



MDF CHEAT SHEET

MDF FUND REQUESTS & CLAIMS: STEP-BY-STEP INSTRUCTIONS


May 2020

MDF FUND REQUEST AND CLAIM PROCESS

- Partner communicates planned MDF activity with Sales and Marketing.
- Partner submits the MDF Fund Request.
- Channel Marketing approves the Fund request and sets up a campaign.
- Partner carries out the activity.
- Partner submits a Fund Claim against the approved Fund Request, including all required Proof of Performance according to MDF Guidelines.
- MDF Admin reviews and approves or rejects the Fund Claim.
- Payment terms for completely documented & approved claims is Net 60.

MDF FUND REQUEST STEP 1:

- Log into the partner portal using your SecureFirst portal credentials.

SONICWALL® | 

SecureFirst

Sign-in to the Partner Portal

User name

Password

Remember me?

Login

[Forgot your password?](#)

DON'T HAVE A LOGIN?

Request access to the SecureFirst Partner Portal.

[Request Portal Access](#)

STEP 2: SELECT "MDF REQUEST:"



STEP 3: CREATE A NEW MDF REQUEST:

 Fund Requests
Recently Viewed 

0 items • Updated a few seconds ago

<input type="checkbox"/>	Request Name	Account	Status	Amount	Created Date
--------------------------	--------------	---------	--------	--------	--------------



STEP 4: COMPLETE REQUIRED FIELDS & CLICK “SAVE & SUBMIT:”

Please provide a detailed description of your request. Include the answers to below questions in your description:

- Title of activity
- Opportunity for SonicWall
- Attendees/Leads/Sends/Views/Clickthrough’s Expected
- Marketing Activities that will be carried out
- Follow up efforts to drive sales
- Expected ROI: e.g. 20 leads, that will turn to 5 opportunities at a value of \$25k on average. Target is \$100k - \$125k
- Expected ROI time frame
- How will you report ROI to SonicWall

Edit Fund Request

Information

* Owner ID: SecureFirst Demo NOAM

Fund Request Number

** Request Name: Complete this field.

** Product Groups

Available: Firewalls, Endpoint, Wireless, Secur...

Chosen:

An option must be selected

** Description:

** Activity Type: --None--

Currency ISO Code: USD - U.S. Dollar

Activity Sub Type: Available, Chosen

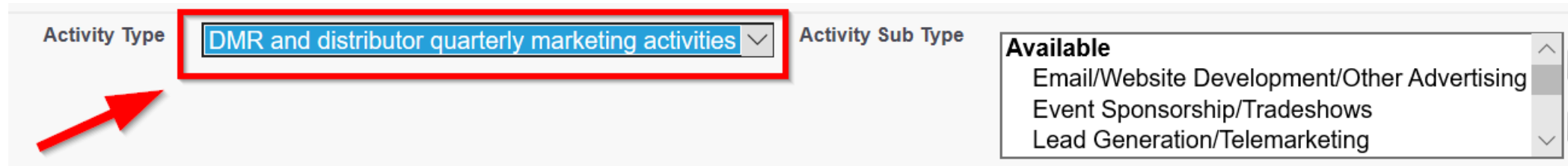
Buttons: Cancel, Save, Save & Submit

WHEN SELECTING ACTIVITY TYPE "DMR & DISTRIBUTOR QUARTERLY MARKETING ACTIVITIES," CHOOSE ALL APPLICABLE ACTIVITY SUB-TYPES:

Activity Type **DMR and distributor quarterly marketing activities** Activity Sub Type

Available

- Email/Website Development/Other Advertising
- Event Sponsorship/Tradeshows
- Lead Generation/Telemarketing



Activity Type **DMR and distributor quarterly marketing activities** **Activity Sub Type**

- Email/Website Development/Other Advertising
- Lead Generation/Telemarketing
- Partner Certification Training
- Sales Enablement Workshops/Inside Training

Chosen

- Event Sponsorship/Tradeshows
- Marketing Materials/Branded Merchandise



ASSIGN PERCENTAGE OF FUNDS TO BE USED FOR EACH ACTIVITY SUB-TYPE AND SAVE. TOTAL MUST EQUAL 100%.

▼ Add/Update Actiity Types

Type	Percentage
Marketing Materials/Branded Merchandise	50.00
Event Sponsorship/Tradeshows	50.00

Total Percentage: 100

MDF FUND CLAIM STEPS 1- CHOOSE THE APPROVED REQUEST:

SonicWall's Marketing Development Funds (MDF) Program enables partners to take advantage of marketing funds in support of demand generation, building brand awareness, and training opportunities mutually beneficial to SonicWall and its certified partner community. Please Note: All MDF claims must be submitted within 90 days post activity completion.

Fund Requests
All Fund Requests

11 items • Sorted by Fund Request Number • Filtered by all fund requests • Updated a few seconds ago

<input type="checkbox"/>	Fund Request Number ↑	Request Name	Status	Activity End Date	Amount
1	<input type="checkbox"/> FR-00000456	Test	Draft	4/17/2017	USD 2.00
2	<input type="checkbox"/> FR-00000840	Alan Test	Approved	6/30/2017	USD 1,000.00

STEP 2 - CLICK NEW FUND CLAIM:

The screenshot displays the SonicWall SecureFirst user interface. At the top, there is a navigation bar with the SonicWall logo, a search bar, a user profile dropdown labeled 'SECUREFI...', and a 'CONTACT US' button. Below this is a secondary navigation menu with items like 'Deal Registration', 'MDF Request', 'Leads', 'Training', 'Marketing Content', 'Sales Content', 'SecureFirst', 'Services', 'MSSP', and 'More'. The main content area shows a 'Fund Request' card for 'Alan Test' with an 'Owner' of 'SecureFirst Demo NOAM'. To the right, there are buttons for 'EDIT' and 'SUBMIT FOR APPROVAL'. A red arrow points to a 'NEW FUND CLAIM' button, which is highlighted with a red box. Below this, a table titled 'Fund Claims (2)' is visible, with columns for 'CLAI...', 'CLAIM ...', 'STATUS', and 'AMOU...'. The table contains two rows of data.

SONICWALL® | SecureFirst

Search Search

SECUREFI... CONTACT US

Deal Registration MDF Request Leads Training Marketing Content Sales Content SecureFirst Services MSSP More

Fund Request
Alan Test

Owner
SecureFirst Demo NOAM

Request Name
Alan Test

Fund Request Number
FR-00000840

Product Groups
Responsible Threats Center

EDIT SUBMIT FOR APPROVAL

NEW FUND CLAIM

Fund Claims (2)

CLAI...	CLAIM ...	STATUS	AMOU...

STEPS 3 & 4: COMPLETE REQUIRED FIELDS, THEN CLICK "SUBMIT & ADD ATTACHMENT." ATTACH REQUIRED PROOF OF PERFORMANCE ACCORDING TO MDF GUIDELINES.

* * Claim Name

* * Amount

Expenditure Type
--None--

* * Claim Details

Currency ISO Code
USD

Approved Date

Fund Claim Number

Age (Days)

Payment and Verification Details

* * Payment Options
Pay to Company

Invoice #

Settlement Reference Num

Claim Paid Date

CM #

Fund Claim
TEST approval/rejection comments

Fund Request
[Alan Test](#)

Claim Name
TEST approval/rejection comments

Expenditure Type
Conference Fees

Currency
USD - U.S. Dollar

Fund Claim Number
FC-00000462

Status
Approved

Amount
USD 1.00

Claim Details
1

Approved Date
8/9/2017

Age (Days)
888

Payment and Verification Details

Payment Options
Pay to Company

Settlement Reference Num

CM #

Performance Attached

Invoice #

Claim Paid Date


Performance Verified

Notes & Attach... (1)

Son...
Aug 9...

[View All](#)

PLEASE ALLOW 60 DAYS FROM APPROVAL DATE TO RECEIVE PAYMENT.

 Fund Claim
TEST approval/rejection comments

Fund Request

[Alan Test](#)

Claim Name

TEST approval/rejection comments

Expenditure Type

Conference Fees

Currency

USD - U.S. Dollar

Fund Claim Number

FC-00000462

Status

Approved

Amount

USD 1.00

Claim Details

1

Approved Date

8/9/2017

Age (Days)

888

EDIT

SUBMIT FOR APPROVAL



Notes & Attach... (1)

UPLOAD FILES



Son...

Aug 9...

View All

THANK YOU

The SonicWall logo features the word "SONICWALL" in a white, bold, sans-serif font. A registered trademark symbol (®) is positioned to the upper right of the final "L". An orange swoosh graphic is located below the "WALL" portion of the text, starting under the "W" and curving under the "A", "L", and "L".

SONICWALL®

www.sonicwall.com

