SONIC**WALL**®

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.

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MDF FUND REQUEST STEP 1:

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

STEP 2: SELECT "MDF REQUEST:"

STEP 3: CREATE A NEW MDF REQUEST:

Fund Requests

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NEW

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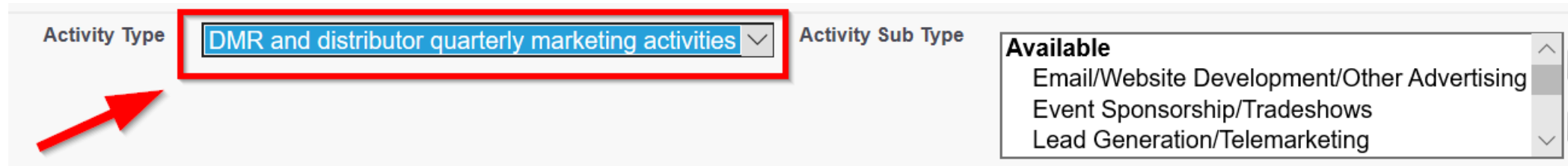
WHEN SELECTING ACTIVITY TYPE "DMR & DISTRIBUTOR QUARTERLY MARKETING ACTIVITIES," CHOOSE ALL APPLICABLE ACTIVITY SUB-TYPES:

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:

STEP 2 - CLICK NEW FUND CLAIM:

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

PLEASE ALLOW 60 DAYS FROM APPROVAL DATE TO RECEIVE PAYMENT.

THANK YOU

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