MICROSOFT SURFACE HUB OPPORTUNITY RESELLER

Readiness and Resource Guide
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Welcome!

Thank you for your interest in the Surface Hub business! We’re excited you’re here. Microsoft created the Surface Hub inventing a new category of collaboration device designed to unlock the power of the group and reimagine the meeting experience. Surface Hub is the best way to create and brainstorm with others. You are part of a select group of resellers chosen to partner with Microsoft to transform your customers’ productivity.

The purpose of this Resource Guide is to provide guidance on the opportunity we see for Surface Hub, the value Surface Hub will provide to your customers, and how to conduct some of the basic business elements with Microsoft like readiness training, device demonstration, basic sales programs, pricing, and Deal Registration.

Understanding the Opportunity

In the following sections we will briefly outline the opportunity we see for Surface Hub broadly in the market as well as the opportunity for you the partner to attach additional products and services increasing revenue, profitability, and customer entanglement.

The Market Opportunity

The Surface Hub is a new category of device, and not easily comparable to other products on the market today, whether for the purposes of market sizing or understanding the direct potential cannibalization. In lieu of a single product comparison, it is both more accurate and more helpful to examine the opportunity and market size of the spaces where a Surface Hub could be deployed, as well as the size of the markets of the current products it would replace. Use the statistics and talking points below to explain the market opportunity to partners, and why we are so excited about launching Surface Hub.

Where we Meet

The opportunity for Surface Hub is primarily in collaborative spaces, where people gather to work jointly together as productively as possible. Globally, there are some 10M large conference rooms and another 30-50M huddle spaces. In addition, there are another 200M personal offices, where many discussions will also take place. Furthermore, there are countless additional spaces that are relevant to a particular vertical, such as classrooms, control rooms, manufacturing floors, design studios, etc.

Group Productivity Market - Spaces people work together

Sources: (1) Internal Estimate based on PCIB (2) Winehouse Research Estimate, Oct. 2014
Existing Products in Meeting Spaces Today
The market for collaborative technology today includes audio conferencing equipment, group video conferencing devices, projectors, large format displays, and interactive displays and whiteboards.

Taxonomy: Overview of the Corporate Display & Audio/Video Conferencing Markets
As of 2014, market estimates in corporate settings (Note: figures below exclude public digital signage and education)

The market for this collaborative technology accounts for over $13B in spending per year.

What’s selling today
Existing market segments that could be disrupted by new category creation

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Projectors(^{(4)})</td>
<td>3.6M</td>
<td>3%</td>
<td>$3.4B</td>
<td>N/A</td>
</tr>
<tr>
<td>Corporate Displays(^{(5)})</td>
<td>2.1M(^{(9)})</td>
<td>14%</td>
<td>$4.2B</td>
<td>2%</td>
</tr>
<tr>
<td>Corporate Interactive Displays(^{(6)})</td>
<td>139K</td>
<td>30%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Group Video Conferencing Devices(^{(7)})</td>
<td>371K</td>
<td>13%</td>
<td>$1.9B</td>
<td>0.2%</td>
</tr>
<tr>
<td>Audio Conferencing / Phones(^{(8)})</td>
<td>41M</td>
<td>2%</td>
<td>$3.6B</td>
<td>-1%</td>
</tr>
<tr>
<td>Whiteboards</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Sources: (4) Units from Future Source Consulting B2B Sales (SMB, Enterprise excl. public displays); revenue estimated using 2013 ASP (PMA) | (5) Future Source, includes B2B sales of Consumer TVs | (6) FutureSource (7) Wainhouse Research (8) Dell’ oro Group (Includes IP conference phones, IP desk phones, IP soft phones, IP wireless LAN phones and traditional phones) | (9) 1.8M units of Consumer TV, 0.3M units of Commercial Flat Panel (10)When available, 2014-2017 CAGR is used for Corporate Projectors, Corporate Displays and Corporate Interactive Displays
The Partner Opportunity

While Surface Hub is an impressive piece of hardware, the real value it offers to partners extends far beyond the transaction of a device. The Surface Hub is the first of its kind - and much of the value partners can capture with Surface Hub is derived from its unique combination of hardware, software, and services.

Many different partner types have an opportunity to gain value from Surface Hub. Resale and fulfillment are just the first part of the broader value chain of a Surface Hub engagement. Partners can be successful with Surface Hub by also selling integration services, including upfront planning, and solutions, both readying existing LOB applications as well as delivering 3rd party solutions that have been built or optimized for the Hub.

### Services and Integration Opportunities

- Skype for Business
- Office 365
- OneNote
- Microsoft Azure
- Windows 10
- 1st and 3rd Party UAPs

### Opportunities with Surface Hub

Elevate your position inside buyer organizations to a strategic buyer level - next generation hardware requires engagement with Technology Management, Business Leaders, and Facilities and Operations.

Construct a portfolio of value-added services and cross-sell, including productivity software (SaaS), ISV software, analytics systems and insights, accessories, and integration services.

Sell to individual employees and not conference rooms - Surface Hub as a hardware offering becomes an extension of the SaaS service, reinforcing and deepening usage.

### Keys for Partner Success:

- Pitch to new buyer roles
Engage in significant demos and POCs
Use hardware as a gateway to a broader SaaS conversation
Tap into buyer innovation budgets
Sell the ease of management and support

Key Sales Scenarios
As you develop go to market plans with your partners, coach them to leverage our learnings thus far in terms of customer buying behavior for Surface Hub as well as the primary customer scenarios we have identified.

Primary Customer Scenarios
1. Workplace transformation: Refresh and build out new experiences
2. Distributed workforce: Remotely collaborate and improve business innovation
3. The empowered executive: Engage effectively with teams
4. Large screen computing: Make decisions faster with improved data insights/visualization
5. Connected business: Transform business processes for enhanced efficiency
6. Re-imagined customer engagement: Enhance customer services using technology

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Key Pitch Points</th>
<th>Decision Maker</th>
<th>Influencers</th>
<th>Cycle Time</th>
</tr>
</thead>
</table>
| 1. Workplace transformation   | - Modernize and beautify your workplace with an all-in-one, elegant design  
                                 - Provide next generation collaboration capabilities to drive employee engagement and group productivity  
                                 - Leverage the productivity tools you own and love – Office, Skype for Business, and OneNote  
                                 - Integrate seamlessly into your backend – a Windows device (centralized management, settings/policy, etc.)  
                                 - Customize experiences per room and keep the device up to date with centralized app installs and Windows updates                                                                 | CXO Facilities | Architects  
                                 | CIO Construction Firms                                                                                                                               | Long, need to be involved early on  
                                 | Typically large deals (100+ units)                                                                                                                    |
| 2. Distributed workforce      | - Leverage a best-in-class digital whiteboard (OneNote) with highly responsive multi-touch and ink  
                                 - Add other media such as apps, web, etc. to the co-creation process versus an ink-only experience  
                                 - Display all participants in a remote meeting to everyone on the call with high quality audio and video  
                                 - Share any content on the screen with remote users via robust device connectivity  
                                 - Save content and innovation for future use                                                                                                       | LOB  
                                 | CXO  
                                 | CIO IT                                                                                                                                             | Medium  
                                 | Evaluation/bake-off  
                                 | Large deals/standardize technology across sites                                                                                                      |
| 3. The empowered executive    | - Modernize executive offices and private                                                                                                              | CXO IT         | Short cycle/impulse         |                                                                           |
| executive | conference rooms with a beautiful, all-in-one, elegant design  
  • Provide high quality video to communicate with distributed teams  
  • Leverage Surface Hub connectivity to discover and explore data in real-time for informed decision making  
  • Share content easily (wireless, wired) for effective reviews (ink-back/touch-back)  
  • Secure devices with “fast start” and “walk away with confidence” capabilities | Facilities | buy  
  Start small/move fast to scale |
|---|---|---|---|
| 4. Large screen computing | • Unlock new ways to engage with data – best-in-class ink and touch, highly responsive with 120Hz refresh  
  • Run Universal apps and HTML5 apps natively  
  • Take advantage of high performance, wired ingest inputs, to power experiences with external compute  
  • Leverage real-time, cloud-powered, data analytics via Surface Hub’s Azure connectivity  
  • Capture screenshots (clips) onto the WB for future use | LOB | IT  
  Short  
 Evaluation/app performance testing  
 Build momentum/win specific audience within customer |
| 5. Connected business | • Bring people together with new form factors (large screen, ink, touch) and introduce group collaboration into workflows  
  • Create new experiences and ways of approaching business problems via new form factors introduced by the Surface Hub  
  • Run Universal apps and HTML5 apps natively to drive consistent experiences across screens in the enterprise  
  • Bring experiences to life both face-to-face and remotely  
  • Install those experiences centrally and quickly across every room within the enterprise | CXO LOB | IT  
  Medium  
 Discovery and design phase to reinvent  
 Major potential business impact ($ savings, way of working) |
| 6. Reimagined customer engagement | • Engage with customers on a new form factor (large screen, ink, touch, sensors)  
  • Tell more engaging stories to audiences in a natural, fluid, and interactive way  
  • Run Universal apps and HTML5 apps natively to drive relevant experiences  
  • Update experiences centrally and quickly  
  • Leverage the flexible deployment options, fixed, rolling, and floor mounts, the Surface | LOB | IT  
  Short to medium  
 Discovery to map key scenario  
 Broad user engagement |
Priority Industries and Verticals

**Manufacturing and Engineering** firms can take advantage of Surface Hub’s powerful pen and touch experience enabling them to conceptualize, design, and review their products digitally, with the added benefit of transforming any space, from the factory floor to the executive conference room, into a collaboration space.

**Design and Creative** firms can collaborate and iterate in real time using outstanding ink and touch capabilities on rich visuals, simplifying workflow processes and gaining rapid consensus regardless of participant location. Surface Hub allows them to transition instantly from working in native applications on any personal productivity device, to working with the group to finesse detailed drawings, 3D renderings and engage in rich modeling applications to reach new levels of creativity and productivity.

**Healthcare** organizations with Surface Hub will improve patient care and satisfaction by collaborating rapidly with teams of experts across geographically dispersed facilities, gain consensus on care plans by including live tele-health specialists, and use advanced ink and touch to co-author and annotate on shared PACS (picture archiving and communication system) and electronic medical records. The Microsoft Surface Hub also delivers an unparalleled medical teaching experience through intimate, hands-on case learning and connecting residents with remote physicians.

**Financial Services** organizations can use Surface Hub’s integrated compute and options for wired and wireless ingest to work seamlessly with real-time data and business critical apps, enabling better informed business decisions and large scale data analysis. Data visualization and engaging presentations on the Surface Hub’s beautifully designed 4K display will drive greater client service and satisfaction.

**Hospitality** organizations can create the most advanced, consistent and compelling meeting and conference offering in order to differentiate from the competition and enable a truly global platform to connect and engage key clients. Surface Hub empowers administrative leadership to collaborate naturally with remote franchise owners or geographically dispersed management using advanced ink and touch capabilities to share insight via powerful yet familiar applications.

**Higher Education** can use Surface Hub to unlock the potential of collaborative learning. Institutions can deliver frictionless education by empowering students and teachers to connect, present, create and engage with specialist educators and remote participants through a platform built for 21st century learning. Surface Hub helps higher education organizations meet students’ expectations for advanced technology in the classroom and prepare students for real world collaborative experiences through powerful productivity applications while unlocking the potential that advanced ink and touch bring to research, storytelling and creativity.

**Public Sector** agencies can use Surface Hub to empower remote and in-room team collaboration across multiple software stacks, while providing the agency a showcase of the new holistic Microsoft software ecosystem.
Sales and Technical Readiness

This section of the document contains some very important links to rich content. Microsoft expects all authorized reseller partners to ensure your sales teams are trained and ready to effectively pitch Surface Hub to your customers and prospects. The links below should all be reviewed in detail and things like branding and marketing assets must be used in compliance with Microsoft brand guidelines.

You will find several useful assets in the following locations:

- **Product Landing Page** – Product specs, Case studies, Apps, Setup, Partners & Support
- **Surface Hub Customer Presentation w/Technical Appendix**
- **Support Landing Page** – SUPER IMPORTANT LINK with readiness guide, admin guide, unpacking guide, mounting and assembly guide, replacement and repair guide, Service Contacts and Warranty info
- **Surface Family Logos**
- **Surface Hub Images**
- **Surface Hub Demo Assets** – DEMO SurfaceHub Sales Deck, welcome screens, apps on Surface Hub, demo script, demo tips and tricks, whiteboard demo and ideas
- **Demo Assets** – Demo Scripts, Apps List, Tips & Tricks
- **FAQs**
  - Surface Hub customer FAQs
  - Surface Hub partner FAQs
  - Surface Hub Onsite Services FAQ
- **Surface Hub customer datasheet**
- **Surface Hub Narrative**
- **Sales Info**
  - How to quote Surface Hub
  - Surface Hub Policy Support
- **Technical Info**
  - Surface Hub Connect
  - Surface Hub core backend integration
  - Surface Hub deployment
  - Surface Hub manageability
  - Surface Hub security
  - Surface Hub site assessment
  - Surface Hub support services
  - Surface Hub Technical Datasheet
  - Surface Hub Certification
  - How to install apps on Surface Hub
  - Surface Hub site readiness guide
- **Training**
  - Selling Surface Hub
  - Surface Hub Technical
  - Microsoft Virtual Academy Product Overview and Demo of the product

We also have some exciting videos to help you see and understand the device:
• **Microsoft Surface Hub - Unlock the power of the group** - Meet Microsoft Surface Hub, the powerful team collaboration device designed to advance the way people naturally work together. Watch as Microsoft Surface Hub unlocks the power of the group

• **Microsoft Surface Hub – Origins** - Meet the creators of Microsoft Surface Hub and discover how these groundbreaking, collaborative devices come to life in our custom-designed manufacturing facility in Wilsonville, Oregon

• **Check under the hood of Surface Hub** - Hardware design, development and management of the specialized Windows operating system on Surface Hub

• **Surface Hub Whiteboard Demo** - Watch this demo of the Microsoft Surface Hub Whiteboard to learn more about how to take your ideas with you. Easily share your whiteboard as a rich OneNote or image file with others so your ideas don’t get lost and you can continue to evolve them after your meeting ends.

• **Surface Hub In Depth Security Measures** - Principal Program Manager Lead for Surface Hub, Paul Barr, walks us through the top defense in depth strategies behind the design of Microsoft’s Surface Hub. As a communal device, the engineering team had the challenge of maintaining Surface Hub’s user friendly, ready to use multimedia experience without compromising on security. Paul takes on possible attack vectors to illustrate Surface Hub’s defense in depth strategies at the level of physical hardware, OS, app and users of the device. Learn more at aka.ms/surfacehubadminguide and aka.ms/endofsession

• **Link to YouTube page with a bunch of great demo videos** – A collection of short videos that dig into many different elements of the device including key applications and demos of individual features like Skype for Business, Whiteboard, collaboration applications. Etc. [This link has a similar collection of useful short videos](https://aka.ms/3Gpf8N)

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**Microsoft Partner Network (MPN) Enrollment**

Opportunity Resellers are required to enroll into the Microsoft Partner Network.

Partners are required to provide both their **Organization Partner ID** and **Location ID** in their registration form. For instructions on how to enroll into MPN IDs, see [here](https://docs.microsoft.com/en-us/marketplace/partner-enrollment). Partners can view the Organization Partner ID and Location ID by logging into their MPN account at [https://partners.microsoft.com/](https://partners.microsoft.com/).
Product Technical Specifications

We are shipping two sizes of Surface Hub, as well as several deployment options and extended warranties. Key specifications regarding the two models are listed below, as well as details regarding our three stand options. It’s important to note that while the hardware is slightly different for the 55” vs. the 84”, the both ship with an identical OS experience and software/services capabilities.

<table>
<thead>
<tr>
<th>Microsoft Surface Hub 55”</th>
<th>Microsoft Surface Hub 84”</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Size</strong></td>
<td><strong>Size</strong></td>
</tr>
<tr>
<td>31.75” x 59.62” x 3.38”</td>
<td>46.12” x 86.7” x 4.15”</td>
</tr>
<tr>
<td>(806.4mm x 1514.3mm x 85.8mm)</td>
<td>(1171.5mm x 2202.9mm x 105.4mm)</td>
</tr>
<tr>
<td><strong>Weight</strong></td>
<td><strong>Weight</strong></td>
</tr>
<tr>
<td>105 lbs.</td>
<td>280 lbs.</td>
</tr>
<tr>
<td><strong>Resolution</strong></td>
<td><strong>Resolution</strong></td>
</tr>
<tr>
<td>1920 x 1080 @ 120 Hz</td>
<td>3840 x 2140 @ 120 Hz</td>
</tr>
<tr>
<td><strong>Compute</strong></td>
<td><strong>Compute</strong></td>
</tr>
<tr>
<td>4th Gen Intel i5, 8 GB RAM, 128 GB SSD</td>
<td>4th Gen Intel i7, 8 GB RAM, 128 GB SSD</td>
</tr>
<tr>
<td><strong>GPU</strong></td>
<td><strong>GPU</strong></td>
</tr>
<tr>
<td>Intel HD 4600</td>
<td>NVIDIA Quadro K2200</td>
</tr>
<tr>
<td><strong>Network</strong></td>
<td><strong>Network</strong></td>
</tr>
<tr>
<td>Wi-Fi (802.11 a/b/g/n/ac), ethernet 1Gbps, Bluetooth 4.0 low energy, NFC reader, Miracast enabled</td>
<td>Wi-Fi (802.11 a/b/g/n/ac), ethernet 1Gbps, Bluetooth 4.0 low energy, NFC reader, Miracast enabled</td>
</tr>
<tr>
<td><strong>Audio/Video</strong></td>
<td><strong>Audio/Video</strong></td>
</tr>
<tr>
<td>(2) 1080p front-facing cameras, 100 degree horizontal field of view, high performance 4 element array microphone, (2) front-facing stereo speakers</td>
<td>(2) 1080p front-facing cameras, 100 degree horizontal field of view, high performance 4 element array microphone, (2) front-facing stereo speakers</td>
</tr>
<tr>
<td><strong>Accessories</strong></td>
<td><strong>Accessories</strong></td>
</tr>
<tr>
<td>(2) Powered, active pens, (1) wireless all-in-one keyboard</td>
<td>(2) Powered, active pens, (1) wireless all-in-one keyboard</td>
</tr>
<tr>
<td><strong>Sensors</strong></td>
<td><strong>Sensors</strong></td>
</tr>
<tr>
<td>(2) Passive infrared presence sensors, ambient light sensors</td>
<td>(2) Passive infrared presence sensors, ambient light sensors</td>
</tr>
<tr>
<td><strong>Ideal room</strong></td>
<td><strong>Ideal room</strong></td>
</tr>
<tr>
<td>Exec Offices, Huddle Spaces, Focus Rooms, Conference Rooms</td>
<td>Conference Rooms, Command Centers, Workshops</td>
</tr>
</tbody>
</table>

From <http://infopedia/kc02/docstore/Repository/Surface%20Hub%20Technology%20Overviews/SurfaceHub-TechSpecs.docx>
Microsoft Pricing Programs Overview

Microsoft is committed to supporting and rewarding eligible partners for their proactive device selling motions. As part of this mission, Microsoft has developed multiple programs to drive up-front discounts for our Authorized Device Resellers (ADR) and Authorized Device Distributors (ADD). These programs fall into two categories:

- Volume Discount Programs
- Deal Registration

Volume Discount Programs

Volume Discount Programs such as “Special Pricing” are designed to help ADRs competitively position Microsoft Devices by granting up-front discounts based on deal size and business case.

Deal Registration

One element of Deal Registration is to reward ADRs for the presales investments they have made for Microsoft Device opportunities.

This Partner Guide summarizes the requirements to participate in these programs and covers key rules and processes. It is designed to help partner teams understand how Microsoft device pricing programs work and how these capabilities align to our go-to-market strategies.
Microsoft Special Pricing and Deal Registration Overview

Special Pricing Overview

The Special Pricing program is designed to evaluate large volume opportunities (50+ units) and award incremental discount for high volume and strategic deals. If awarded, discounts may vary by SKU and are based on several different factors. Special Pricing approvals are reserved only for large and strategic opportunities, and simply meeting minimum quantity threshold (50 units) doesn’t guarantee approval.

Deal Registration Overview

Deal registration is a program to provide recognition to resellers who invest resources into developing relationships and closing sales with customers. The objective of the deal registration is multifold: drive partner sales investment and create pipeline visibility. Deal Registration is intended to reward the ADR for investment of resources and time spent to develop and support Surface wins for eligible products and customer base.

To support these objectives, ADR is eligible for discount % off the Net MSRP at time of transaction as an additional discount for the primary Reseller driving the opportunity. The discount can vary based on the device and model and is provided to the Reseller upfront by Microsoft’s Authorized Device Distributor.

Special Pricing and Deal Registration Program Policies

Special Pricing and Deal registrations requests will need to be submitted via the online submission tool (https://www.microsoftdevicevpp.com) and must meet the following criteria:

Deal Criteria

<table>
<thead>
<tr>
<th>Deal Registration</th>
<th>Special Pricing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Order Quantity</td>
<td>&gt;10 units</td>
</tr>
<tr>
<td>Eligible Devices</td>
<td>Surface Hub Devices*</td>
</tr>
<tr>
<td>First Come, First Serve</td>
<td>First ADR in with BANT secures registration (Budget, Authority/Decision Maker/Need/Timeframe)</td>
</tr>
<tr>
<td>Deal Stacking</td>
<td>Deals can be stacked with Special Pricing on eligible products</td>
</tr>
<tr>
<td>RFPs/RFQs/Public Tenders</td>
<td>Up to 3 Resellers qualify for discount (restrictions apply)</td>
</tr>
</tbody>
</table>
Country-by-Country Registrations

Completed in the country where the deal is transacted unless both Reseller and Customer are located in the EU/EFTA region

Discount Offer

<table>
<thead>
<tr>
<th>Units</th>
<th>Discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 – 19</td>
<td>+1%</td>
</tr>
<tr>
<td>20 – 29</td>
<td>+1.5%</td>
</tr>
<tr>
<td>30+</td>
<td>3%</td>
</tr>
</tbody>
</table>

Varied – meeting criteria above does not guarantee Special Pricing discount approval.

*Specific models may be excluded

Criteria from the Reseller

1. **Deal Intelligence:** The Reseller must report information related to a deal's budget, authority, need and timeline (BANT)
   a) **Budget:** Rough order of magnitude of deal size in local currency
   b) **Authority:** Customer who is responsible for purchase decision. The Reseller must provide the customer's name, country, address, email, and contact name and title
   c) **Need:** Quantity and type of product (SKU-level) being considered, nature of business requirement to be addressed, current usage of tablets (if any), other OEM products in consideration
   d) **Timelines:** Expected date of deal closure of and shipping date

2. **Deal Investment:** The Reseller must report information on all qualifying pre-sales activities completed in support of a deal. Examples of qualifying activities are:
   a) Sales meetings for Surface Hub with qualified buyers
   b) Preparing a requirements/scoping document for Surface Hub
   c) Account meetings with Microsoft employees regarding Surface Hub opportunities

Other Business Considerations

1. **Internal Purchases:** Deals that involve a Reseller purchasing Microsoft products for their own use or purposes do not qualify for Deal Registration or Special Pricing

2. **Overarching Conditions:** A deal will not qualify for Deal Registration or Special Pricing if it violates any overarching conditions restricting business between Microsoft and an end customer, e.g. violations of trade sanctions or embargoes

3. **Other Considerations:** Microsoft reserves the right to immediately deny or end Deal Registration or Special Pricing eligibility based on other criteria not explicitly mentioned in this document

Deal Registration Specific Policies

1. **First Come, First Serve:** The first Reseller to successfully register a deal according to all criteria may be granted Deal Registration. Requests will be considered in the order in which they are received. Microsoft, in its sole discretion, also reserves the right to grant Deal Registration to more than one Reseller for any particular deal.

2. **Catalog and Consortium Buying:** The Deal Registration desk reserves the right to deny Deal Registration for a deal that a Reseller sources from an agreed upon Catalog or Consortium buying contract.

3. **Promotions:** Reseller may not receive both a promotional discount and deal registration credit on same transaction unless stated otherwise in promotion Terms and Conditions.

4. **RFPs/RFQs/Public Tenders:**
   a. Microsoft considers an RFP/RFQ/Public Tender to be when an End Customer requests pricing on a deal to multiple Resellers at a similar time.
   b. If Deal Registration has not been granted to one or more Reseller(s) prior to issuance of an RFP/RFQ/Public Tender, Deal Registration will be available for up to 3 Resellers within a one-month period from date of issuance.
   c. If Deal Registration has been granted to one or more Reseller(s) prior to issuance of an RFP/RFQ/Public Tender, Deal Registration will be denied for requesting Reseller(s).
**Special Pricing Considerations**

Discount approvals are subject to the availability of inventory. Discount percentage is calculated based on **net MSRP** as of the date of the approval, and is shown on the approval for reference. The “Approved Special Price” will remain the same even if net MSRP changes.

If there are multiple Part Numbers contained in a discount request, the quantity split among Part Numbers is an estimate. The Approved Special Price for each Part Number is based on the combined sum of all Part Numbers and it’s the total combined volume (not the estimated Part Number split) that must be met in order for Approved Special Prices to apply. If the total number of units requested for discount is not transacted prior to the Expiration Date of the approval, Microsoft reserves the right to retract any volume discounts applied.

Submitting for Special Pricing does not guarantee a discount approval. If Microsoft awards Special Pricing, it will be in an effort to reduce end customer prices for high volume and strategic orders.

Special Deal Distributor Buy Price is calculated based on net MSRP at time of approval. Distributor credit memo calculation is equal to the difference between the Special Deal Distributor Buy Price and the Distributor List Price at the date of end customer PO. All credit memo request need to have the approved Special Pricing case number in order to be validated.

In the event that an approved Special Pricing opportunity will not meet the threshold outlined in the original approval, it is the responsibility of the Reseller to inform Microsoft of the change prior to transaction.

**Registration Request Process for Special Pricing and Deal Registration**

In order to streamline the request process, all requests for Deal Registration and Special Pricing utilize the same intake tool.

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**Process Flow for Microsoft Device Channel Discounting**

1. Reseller requests deal registration and/or special pricing using the online submission tool ([www.microsoftdevicevpp.com](http://www.microsoftdevicevpp.com)).
2. Within 3 hours of receiving a Special Pricing or Deal Registration Form, Microsoft will respond with a confirmation of receipt by e-mail.
3. Within 2 business days (3 days for identified APOC Countries), Microsoft will communicate the request approval/denial to the Reseller and / or Distributor referencing the case ID number.
   a. For Special Pricing requests, Microsoft will communicate the request approval/denial to the preferred Distributor referencing the case ID number and inform the ADR and requester that the approval has been processed.
   b. If Deal Registration has also been requested, the same email with Special Pricing info will also include Deal Registration info and be provided to the requester identified in the intake form. The preferred Distributor will also be notified if applicable.
c. The 2 business days may be extended for both Special Pricing and Deal Registration if additional information is needed to evaluate the request (i.e. high volume deals, incomplete details, etc.).

d. Additionally, if by exception the decision for one program is taking much longer than the other program, the Disti and Reseller may be notified of decision in separate emails. There will still be only one case ID number generated.

4. If approved, Reseller places order with the Distributor, referencing case ID number for their approved pricing programs.

5. Distributor fulfills the Reseller order including the approved discount(s).

Desk Operations

Microsoft will separately consider a deal’s eligibility for Deal Registration and Special Pricing. A deal may qualify for Deal Registration and not qualify for Special Pricing or vice versa. Regardless of if one or both programs are requested, approved, or denied, a single case ID number will be created to represent the entire opportunity.

Within the email sent to ADD’s, all pertinent information for requested pricing programs will be included such as SKU(s), quantities, decision (approved/denied), discounts granted (if applicable) etc. Within the email sent to Reseller, SKU(s) and quantities will be included with Deal Registration decision as well as processed/denied info for Special Pricing.

Timeframe of Approved Deals

Approved Deal Registration and Special Pricing discounts will be valid for 9 months from initial approval date. All transactions for an approved deal made in this time period will receive approved discounts. If the total units that have transacted during the 9-month eligibility period is less than the program’s unit minimum, any discounts applied may be retracted.

Approved Deal Extensions

Approved deals are valid for 9 months. The Microsoft Deal Registration and Special Pricing desks reserve the right to grant Deal Registration/Special Pricing extensions for up to 90 days if justified. The Reseller may extend a deal if it demonstrates to the Microsoft that such an extension is warranted. A Reseller must verify that:

- The original deal timeline has been extended
- The Reseller remains actively invested in closing the deal
- The Reseller / Customer are still on track to meet the volume commitment

Other Extension Request details:

- All deals that expire without a request for extension will be closed
- A deal can be extended up to an additional 90 days (from the original Deal Registration/Special Pricing expiration date)

If a Reseller fails to request an extension prior to the original Deal Registration/Special Pricing expiration date, that Reseller may forfeit the ability to extend or re-register the opportunity.

Microsoft has full discretion on whether to grant or deny a Deal Registration/Special Pricing extension request. A Deal Registration/Special Pricing approval will not be renewed or extended under the following circumstances:

- Reseller fails to show substantial progress with the End Customer with respect the sales of Microsoft Devices
- Reseller fails to keep the opportunity current by updating prior to the expiration date
- The original opportunity did not identify a specific project name and was not updated prior to the expiration date
Changes to Approved Deals

In the event that an approved deal changes (i.e. the end customer is looking for a different product model), the Partner will need to inform Microsoft of the change to ensure the approval is still valid.

- To make edits to an existing request please locate it by case number via the Case Search Tool then click the ‘Edit Request’ button at left. You will be directed to the original request form with the following editable fields (all others are greyed out and un-editable): Reseller contact name and email, Distributor, Distributor contact name and email, Pre-sales Activity, Business Use Case. Additionally, you may add new SKU’s, update SKU quantities, or apply for an additional program.

- To request an extension to your existing request, locate it by case number via the Case Search Tool then click the ‘Request Extension’ button at left. In the subsequent page, input evidence of ongoing or reinstated pre-sales activity in addition to extension justification.

Validation of End Customer

Microsoft retains the right to validate requests by contacting end customers to confirm accuracy of information. This activity should be conducted only when absolutely required and should be minimally invasive. This contact may be conducted by the deal desks, or it may be delegated to Partner Sales Executives (PSEs), customer Account Executives (AEs), or other Microsoft parties.

Pricing Program Validation Status

Microsoft will provide partners with formal notification of validation status. Valid notifications will be in email from the Microsoft Business Desks and any other notifications will not be honored.

Upon submission of Deal Registration and/or Special Pricing request, Partners will receive a confirmation email. The Reseller will be provided a validation result (approved, denied, or pending further consideration) within two business days upon submission (3 days for identified APOC countries).

Should Microsoft deny a request, the Reseller will be informed of the denial via email. Should Microsoft deny a request, the business desks will inform the Reseller as to why the request was denied. Primary reasons for a denied request include, but are not limited to:

- Opportunity is already registered in our system
- Product registered is not eligible
- Opportunity does not meet minimum threshold requirement
- Proof of investment, via activities and detail are insufficient
- Discount has already been provided for this opportunity

Denied Deal Contestation

A Reseller does have the right to contest a denied deal. The Partner will need provide additional information as to why the validation is being contested. Once a deal is contested, the existing SLA will be changed to 5 business days from the time all of the necessary information has been received to provide a resolution to the Partner outlined communication guidelines.

- For Deal Registration denials, Partners should forward their denial email to HBD-REG@microsoft.com to provide justification and contest a denied request.
- For Special Pricing denials, Partners should forward their denial email to HBD-EXT@microsoft.com to provide justification and contest a denied request.

Device Pricing Program Transaction Audit

All transactions are subject to audit on a quarterly basis.
• An audit may be invoked due to, but not limited to, discrepancies between Distributor reporting and approved Discount Form, number of units transacted does not meet the special deal unit request, or number of units fall under/over specified thresholds.

• When an audit is invoked, Microsoft may request additional end customer and Reseller information, including but not limited to:
  • Invoice from Distributor to Reseller, containing end customer information
  • PO between end customer and Reseller, containing number of units (pricing information must be blocked)
  • Special Pricing and / or Deal Registration Case Number

• Distributor will have 15 calendar days to satisfy the information request once the document request is made.

• Should any transactions fail an audit, Microsoft will contact Distributor with explanation.

• For any transactions that fail audits after this period, Microsoft will deduct the value of the transaction from future credit memos and reserves the right to perform a wider review of all of special deals reported over the audit period. Repeated violations may result in temporary suspension of special deal pricing for the violating Reseller.

Distributor Deal Registration Validation

The Reseller may choose to fulfill a deal using any Microsoft Authorized Device Distributor. Distributors should validate every case ID number prior to quote and transaction via the Distributor Case Number look-up tool (http://dddlookup.azurewebsites.net/).

Relationship with Microsoft’s Direct Selling Channel

Reseller and Microsoft (including Microsoft Retail Stores) are each free to compete for any deal regardless of whether or not a deal has been registered.

Participation Requirements and Updates

Microsoft may monitor and report on key metrics including but not limited to:

• Resellers’ deal closure rates
• Resellers' projected versus actual order sizes
• Distributors' end customer data vs. activation data
• Reseller / Distributors’ track record of upholding program rules

Microsoft may also request that any Reseller participating in any of the above mentioned Pricing Programs provide proof of engaging in the activities relating to the capability. Microsoft may deny a Reseller’s approved deal and/or remove a Reseller from approved deal if:

• A Reseller is unable to provide evidence of having performed the activities described for a registered deal
• A Reseller is shown to have submitted false or misleading information for a registered deal
• Microsoft has reasonable grounds to conclude that a Reseller has not acted in good faith in registering a deal
• Microsoft has received evidence that a deal is part of a formal RFP/RFQ process

In the event that Microsoft discovers that a Reseller has engaged in any of the above misconduct or has a consistent track record of not upholding program rules (i.e. minimum order quantities), Microsoft may recover any benefit already provided to the Reseller through an offset against future earnings, rebates, discounts, incentives, etc., or through a direct payment from the Reseller. Microsoft reserves any other rights to recover damages from Resellers that engage in misconduct in connection with any of the Devices Pricing Programs.
Devices Credit Memo Process (ADD)

Distributors are required to report on all Pricing Discount transactions within the time period outlined per program to be eligible for credit memo payment. Below outlines the required information needed in order for Microsoft to process the credit memo request.

Reporting Periods for Credit Memo Submission

All pricing discount credit memo submissions must be received within 60 days of the invoice date. If Microsoft does not receive a valid credit memo request within the 60 day period, Microsoft will refuse the credit memo request.

Data Requirement for Credit Memo Submission

Distributors are required to report in the information outlined below. In an effort to simplify the reporting experience, Microsoft does not require a standard template to be utilized. Distributors are able to send in the required information in any editable format for review:

- All credit memo request should be sent to DDDCM@microsoft.com
- For each credit memo request, Disti must provide the following information:
  - Invoice Date
  - Invoice #
  - ADR Name
  - End Customer
  - Customer Country
  - PO Date
  - PO # to Reseller
  - Credit Claim Case Number (Deal Reg Case Number / Special Pricing Case Number / Bid Grid / Promo Claim Code)
  - Disti Unique Case (Deal) # if available
  - SKU
  - Quantity

Credit Memo SLA and Memo Process

Microsoft will issue credit memo disbursement within 30 days of receiving the formal credit memo request from the Distributor. Distributor submits credit memo request to DDDCM@microsoft.com

- Microsoft’s credit memo desk processes and validates transactions
- Payments on discounts on approved transactions are executed
- Distributor receives a presentment report that details the credit memo requests that were approved, paid, and/or rejected
- If any credit memo requests got rejected, Microsoft will communicate this back to the Distributor for updates. Once any updates happen for the records in question, Microsoft will have an additional 30 days to process the updated request.

Pricing Program Calculations

Microsoft will validate and calculate the approved credit memo amount based on individual program business rules. Calculation will be against the following:

- Deal Registration – Approved discount% off of Net MSRP for each unit. Approved discount % varies based on product and model.
Special Pricing – Approved discount% off of Net MSRP for each unit. Approved discount % varies based on deal size and business case.

Pricing Program Presentment
Post payment execution, Microsoft will provide each Disti with a presentment report that outlines the following:
- All approved Credit Memo payments with details on payment calculation
- Total amount of credit memo Distributor received
- All rejected credit memo request with corresponding rejection rationale

Note on Revisions to Policies
Policies will be reviewed quarterly, and Microsoft will use reasonable efforts to notify Partners of any changes. In certain situations, Microsoft may need to revise, amend, or add deal registration policies immediately.

Appendix
Roles and Responsibilities
Authorized Devices Reseller ("ADR" or “Reseller”), the end customer contact, is responsible for requesting Device Discounts from Microsoft’s Business Desk. The Reseller is expected to apply for a deal only after completing a minimum threshold of sales activities and only if a potential deal exceeds a minimum order quantity as well as other criteria (see thresholds for both Special Pricing and Deal Registration).

Authorized Devices Distributor ("ADD" or "Distributor"), the Microsoft partner that directly sources hardware devices, is responsible for fulfilling deals and implementing discounts approved by Microsoft, based on unit size and case number, and for providing a monthly report with executed deals to align to Special Pricing criteria. Distributors are also required to implement the additional discount approved for deal registration, and for providing a monthly report with executed deals.

Microsoft Business Desk is responsible for validating and approving or denying all Special Pricing and / or Deal Registration requests (see "Validation") and for managing all partner appeals (see "Contestation"). The Desk also issues capability communications to partners (see "Communication"), confirms Distributor fulfillment and reimbursement (see "Transaction"), and tracks KPIs for program compliance (see "KPI Tracking and Audit").

Microsoft Manufacturing, Supply Chain, Information and Services (MSCIS or Microsoft Supply Chain) is responsible for operationalizing the approved deal and ensuring that Authorized Device Distributors are made financially whole in a timely manner.

MSRP is the manufacturer’s suggested retail price.

Net MSRP is equal to MSRP less the sum of VAT and copyright levies. Reference net MSRP documents are available via the Microsoft Readiness App.

Distributor List Price is the Distributor’s cost (standard buy price from Microsoft) as published on Microsoft’s price list to Distributor.

Special Deal Distributor Buy Price ("Distributor Buy Price") is the Distributor’s adjusted cost granted by WWLP and is specific to the Special Deal approval.
Addendum A

EU/EFTA Cross-Border Commerce

Resellers located in the EU/EFTA region (see list of included countries below) can receive a deal registration discount on deals to Customers also located in the EU/EFTA region regardless of whether both Reseller and Customer reside in the same country.

Example:
A Reseller in England can apply for and receive a deal registration discount for a deal to a Customer in France.

Conditions:
In order to receive deal registration discounts on deals to Customers located outside the Reseller’s country, the Reseller must be authorized to sell eligible Microsoft products to the country the prospective Customer is located.

Restrictions:
A deal that involves a Reseller in the EU/EFTA region and a Customer not in the EU/EFTA region will not qualify for deal registration. Resellers in EU/EFTA will apply for deal registration the same way as described in Partner Guide and are subject to the same requirements and conditions therein.

European Union/European Free Trade Association (EU/EFTA) Country List

Austria
Belgium
Bulgaria
Croatia
Cyprus
Czech Republic
Denmark
Estonia
Finland
France
Germany
Greece
Hungary
Ireland
Switzerland
Italy
Latvia
Lithuania
Luxembourg
Malta
Netherlands
Poland
Portugal
Romania
Slovakia
Slovenia
Spain
Sweden
Iceland
Norway
Supplemental Guide for Skype for Business – Surface Hub Deployment Planning

Introduction

Microsoft Surface Hub is an all-in-one productivity device that is intended for brainstorming, collaboration, and presentations. To get the maximum benefit from Surface Hub, a customer’s infrastructure and the Surface Hub itself must be installed (physically) and integrated (Skype for Business, Exchange and Intune). The Surface Hub uses an Exchange Resource account that is SIP enabled via Skype for Business and managed via standard Mobile Device Managers (MDM) like Microsoft Intune. The Surface Hub Deployment Planning offer provides a guided document to assist the customer in the successful deployment of the Surface Hub into their enterprise.

Skype for Business – Surface Hub Deployment Planning 1-day

This 1-day engagement is intended to provide a planning document to successfully plan for the deployment of a Surface Hub into a customer’s infrastructure by:

Preparation of a customer’s environment for a Surface Hub deployment
  - Completion of preparation checklist (assessment)
  - Creation and verification of device (resource) account
  - Creation of provisioning package (optional)
  - Creation of admin groups to include Domain AD, Azure AD and Local
  - Completion of a Set-up Worksheet to ensure successful deployment

Provide guidance towards the installation and setup of a Surface Hub

  - How to physically prepare the site and install the Surface Hub
  - Steps needed to complete the Surface Hub Out of Box Experience (OOBE) First-run program

Provide guidance towards management of a Surface Hub to include:

  - Installation of customer applications, saving of bitlocker, and personalization of Surface Hub
  - Local Management – IT staff understanding of the Settings app on the device
  - Remote Management – Enrollment of Surface Hub in a MDM (1st or 3rd Party) and Microsoft OMS (optional)
  - Integration of Surface Hub into existing Room Control Systems, Audio and Video sources (optional)

Training the IT Staff and End-user customers on the admin and use of the Surface Hub

  - Review of Surface Hub Settings app, MDM and OMS administration of Surface Hub
  - Demonstration of Surface Hub functionality at a user level to confirm successful deployment

Offering Goals and Benefits to partner and customer

The primary goal of the Surface Hub Deployment Planning offering is to allow Surface Hub and Skype for Business partners with competency the ability to offer a customized solutions document to Surface Hub customers that ensures a successful deployment. The resulting deployment plan can not only educate the customer on the path to deployment but also enlighten them towards the deployment services of the partner as well as managed service opportunities to maintain meeting room solutions and deploy additional Skype for Business solutions.
For the customer the deployment planning offering provides peace of mind towards the investment in Surface Hub and integration into existing infrastructures. The goal being a fully functioning and highly utilized Surface Hub solution.

**Required Skills for Delivery**

The following background and skill sets are recommended:

- Completion of the MPN Surface Hub competency by the delivering service professionals
- Or
- MPN Silver or Gold Communications competency
- Surface Hub IT Pro Training

**Technical Resources**

- Surface Hub Administration Guide
- Surface Hub Readiness and Support Guides
- Surface Hub IT Pro Training
- Surface Hub and Windows 10 Enterprise Differences
- Using the Surface Hub - Videos
- Surface Hub Application Development

**Engagement Closure**

The partner will provide and review a written deployment plan that allows the customer to successfully deploy the Surface Hub. As a result of the customer following the deployment plan, they will be able to successfully:

- Make and receive Skype for Business calls as well as share content via the Surface Hub
- Using the OneNote Whiteboard create, send via email and share via OneDrive content
- Connect to the Surface Hub via both Wired and Wireless (Miracast) from external devices
- Schedule a Skype for Business meeting on the Surface Hub and join the meeting with one touch
- Successfully use external room control systems, audio and video sources (optional)
- Using remote management tools such as Intune apply policy and applications (optional)

**Surface Hub Deployment Plan (Template)**

Preparing a customer’s environment for a Surface Hub deployment

- Completion of preparation checklist
  - Reviewed with customer for complexity and resources needed to be successful.
  - Creation and verification of device (resource) account
  - Step by step guidance to customer on the creation of the resource account within Exchange and Skype for Business based on the complexity of the infrastructure obtained from the preparation checklist. Point out the PowerShell commands and Scripts available for account creation.
  - Creation of provisioning package (optional)
• Guidiance on the creation of provisioning packages that simply remote and/or large scale deployments.

Creation of admin groups to include Domain AD, Azure AD and Local

• Recommendation of the admin group to use for deployment and the advantages of using that particular group. Provide guidiance on the preparation needed to successfully enroll the Surface Hub in the a particular admin group.

Completion of a Set-up Worksheet to ensure successful deployment

• Provide a completed Set-up Worksheet and review content with customer.

Deploying a Surface Hub

Physically prepare the site and install the Surface Hub

• Based on findings from Preparation Checklist and review of Surface Hub Site Readiness Guide provide step by step guidance for installers for each movement of the device from receiving the device, through movement of packaged device in building, to the final mounting and powering on of the device. Particular care and explanation should be provided for movement and installation of the 84” Surface Hub.

Completion of the Surface Hub Out of Box Experience (OOBE) First-run program

• Customized screen shot by screen shot of what should be entered by the customer and/or installer for completion of OOBE.

Managing a Surface Hub

Install customer applications, save bitlocker, and personalize Surface Hub

• Review with the customer the steps needed to install applications and complete the setup and personalization of the Surface Hub.

Local Management – IT staff understanding of the Settings app on the device

• Provide a screen by screen review of the Surface Hub settings app and where to make standard changes and updates to the device.

Remote Management – Enrollment of Surface Hub in a MDM (1st or 3rd Party) and Microsoft OMS (optional)

• Based on customer’s manageability solutions recommend steps for integration of the Surface Hub into the existing environment.

Integrate Surface Hub into existing Room Control Systems, Audio and Video sources (optional)

• Provide guidance to create the necessary command set to control the Surface Hub from existing room control systems such as Crestron or AMX.
Microsoft Surface Hub Installation and Integration Preparation Checklist

Thank you for your purchase of the Microsoft Surface Hub. The following material and checklist is intended to assess your environment and ensure a smooth physical installation and integration into your IT infrastructure.

**Physical Installation:**

Prior to receiving your device, it is recommended you review a number of documents hosted online regarding site preparation for the Surface Hub. In particular, please review the power, Ethernet and weight/orientation requirements of the devices.

- [Microsoft Surface Hub Support Page](#) – Install, User and Warranty Guides
- [Surface Hub Site Readiness Guide](#) – Tech Specs and advice to ensure your site is ready
- [Unpacking Guide for 55” Surface Hub](#) – Safely remove from packaging.
- [Unpacking Guide for 84” Surface Hub](#) – Safely remove from shipment container.

**Surface Hub Specific Preparation:**

Please review the Readiness Guide and Unpacking Guides above and answer the following questions to ensure your site is ready for the device.

1. Does your facility have a loading dock that can accept the size of the shipment container? (The 55” Surface Hub’s shipping dimensions are 43 x 65 x 20 inches (109 x 165 x 51 cm HxWxD) and ships at approximately 150 lbs. /68 kg. The 84” Surface Hub’s shipping dimensions are 64.75 x 99.5 x 24 inches (165 x 253 x 61 cm) and ships at approximately 500 lbs. /227 kg. The shipping containers must remain upright!
   - [ ] Yes  [ ] No  If NO, please describe the delivery arrival area of the facility and path indoors.

2. If going to upper floors does the facility have an elevator that fits the Surface Hub (55” or 84”)?
   - [ ] Yes  [ ] No  If NO, please describe path (stairs, ramps, etc.) the device will need to follow to reach its destination.

3. If you have ordered an installation are there any labor restrictions, insurance requirements or particular site requirements that must be in place prior to the device and installation teams arrival?
   - [ ] Yes  [ ] No  If Yes, please describe the particular details needed.

4. Have you ordered a wall mount or stand? If so, what is the expected delivery date?
   - [ ] Yes  [ ] No  If Yes, please describe the particular details needed including anticipated delivery date.

**Integration into your IT Infrastructure:**

The Microsoft Surface Hub has dependencies on Microsoft infrastructure solutions such as Exchange and Lync / Skype for Business. Microsoft has written a complete guide for the preparation, setup and administration of the Surface Hub.

The Surface Hub administrator guide is hosted on Microsoft TechNet.

- [Microsoft Surface Hub administrator’s guide](#)

The guide is a useful resource to learn about dependencies, complete a setup worksheet and create/test the device account ([Surface Hub](#)). It is highly recommended this guide is referenced prior to receiving your Surface Hub device. In particular, the device account needs to be created prior to device installation.
While the guide is written for standard integrations we understand there are far more complex environments. Please help us understand your environment by answering the following questions. The completion of this checklist will assist in providing additional guidance to complete the device integration.

**Have you deployed Office 365 Workloads?** *(Definition Here)*
- [ ] Yes  [ ] No

If Yes, please list the used workloads:_______________________________________________

**How do you manage the Office 365 Accounts in your Deployment?** *(Definition Here)*
- [ ] Federated account (federated identity e.g. ADFS & AADSync)
- [ ] Work or school account (cloud identity)

**Are you using ExpressRoutes for your Office 365 Workloads?** *(Definition Here)*
- [ ] Yes  [ ] No

**What is the deployment type(s) - hybrid/on-prem/cloud?**

- [ ] 1. Online deployment (Office 365): Your organization's environment is deployed entirely on Office 365.
- [ ] 2. On-premises deployment: Your organization has servers that it controls, where Active Directory, Exchange, and Skype for Business (or Lync) are hosted.

- [ ] 3. Hybrid deployment: Your organization has a mix of services, with some hosted on-premises and some hosted online through Office 365.


**Have you deployed Microsoft Exchange?**
- [ ] Yes  [ ] No

If Yes, how do you have it deployed?
- [ ] Exchange 2010  [ ] Exchange 2013  [ ] Exchange 2016  [ ] Office 365  [ ] Hybrid

If No, please describe what you are using for email and calendar services? ________________

**Have you deployed Lync / Skype for Business?**
- [ ] Yes  [ ] No

If Yes, how do you have it deployed?
- [ ] Lync 2010  [ ] Lync 2013  [ ] Skype for Business 2015  [ ] Office 365  [ ] Hybrid

If No, please describe what you are using for Voice, IM and Presence? ________________

**Is the Autodiscover service (lyncdiscover/lyncdiscoverinternal) published for your SIP-Domains?**
- [ ] Yes  [ ] No

**How many Active Directory forests do you have?** *(Definition Here)*
- [ ] 1  [ ] 2  [ ] 3+
Are Exchange and Lync / Skype for Business hosted in the same forest?
☐ Yes  ☐ No

Have you disabled TLS-DSDK(default) user auth in Lync / Skype for Business? (Definition Here)
☐ Yes  ☐ No  If Yes, please describe what you are using? _______________________________

Do you support Exchange Active Sync (EAS) for devices connected to your internal network?
☐ Yes  ☐ No

Are you using Direct Routes to the internet or a Web Proxy Server?
☐ Yes  ☐ No  If No, please describe what you are using? _______________________________

Do you support Exchange Active Sync (EAS) for devices connected to your internal network?
☐ Yes  ☐ No

Are you using Direct Routes to the internet or a Web Proxy Server?
☐ Yes  ☐ No  If No, please describe what you are using? _______________________________

Does your Web Proxy Server require Authentication? (please describe)
☐ ______________________   ☐ No

Will the Microsoft Surface Hub be connected via Ethernet directly to your Internal network?
☐ Yes  ☐ External  ☐ DMZ  ☐ No Internet  ☐ Other: _______________________________

Do you need a Root Certificate added to a device in order to access Lync / SfB and/or Exchange?
☐ Yes  ☐ No

Which MDM solution are you currently using?
☐ Microsoft Intune  ☐ SCCM  ☐ AirWatch  ☐ Mobile Iron  ☐ Other: __________

Do you support DHCP for the network on which the Surface Hub will reside? (Dependency)
☐ Yes  ☐ No

Will the Surface Hub be deployed to the same security zone as other SfB clients on the internal network? (Dependency) (Client Required Ports Definition Here)
☐ Yes  ☐ No

Have you created and verified the Surface Hub Device Account? (Admin Guide)
☐ Yes  ☐ No

Have you downloaded the Lync Store App and Windows Mail App to verify functionality?
☐ Yes  ☐ No

Are you using QoS in your Lync/Skype for Business deployment? (Definition Here)
☐ Yes  ☐ No

Have you had a Lync / SfB network assessment provided in the past year? (Definition Here)
☐ Yes  ☐ No

Please list the Serial Number of the Device(s) you have received.
Serial Number(s)
Surface Hub Customer FAQ’s and Licensing Guidance

Availability

What markets will Surface Hub be available in?
Initially, Surface Hub is shipping to select markets, including Australia, Austria, Belgium, Canada, Denmark, France, Finland, Germany, Ireland, Italy, Japan, Luxembourg, Netherlands, New Zealand, Norway, Portugal, Qatar, Singapore, Spain, Switzerland, United Arab Emirates, United Kingdom and the United States. Visit https://www.microsoft.com/microsoft-surface-hub/en-us/find-a-hub for more information.

Is Microsoft planning on shipping Surface Hub to additional markets?
Microsoft may announce new potential markets at a later date.

Is there a difference in availability for 55” and 84” units? Will I get them quicker if I order just one size?
Please contact your Reseller for a specific availability and delivery timelines. Scenarios might vary based on the Reseller.

What is the lead time for a new order placed today? When will it arrive?
Your authorized Surface Hub reseller can give you more specific information on lead times.

Is Surface Hub available for consumers?
Not at this time. Microsoft Surface Hub is ideal for business scenarios and enterprise use only; it is a first-of-its-kind collaboration device designed for group productivity and decision making.

Can I use Group Policy Objects (GPO) to manage settings on Surface Hub and HoloLens?
No. Surface Hub is designed to be “appliance-like” in both how it is used and how it is managed. Group Policy is designed for managing PCs and servers, and contains thousands of different knobs and levers—the vast majority of which does not apply for Surface Hub. You can manage Surface Hub using an existing Mobile Device Management (MDM) solution that you may be using for iOS and Android devices.

Can I use System Center Configuration Manager (SCCM) to manage settings on Surface Hub and HoloLens?
Yes. Surface Hub can be managed using your existing Configuration Manager (CM) infrastructure. The current branch of CM supports modern devices that do not require the Configuration Manager client to manage them, including Surface Hub (see this article for more info). This requires an Intune subscription, but you can continue to use CM's administrative console as your "single pane of glass" for managing all of your devices. Note that you can also manage Surface Hub using an existing MDM solution that you may be using for iOS and Android devices.

Can I use Mobile Device Management (MDM) to manage Surface Hub and HoloLens?
Yes. Surface Hub can be managed using an existing MDM solution that you may be using for iOS and Android devices.

How do I manage updates in Surface Hub?
There are a couple ways you can control updates to your Surface Hub:
I. Windows System Update Service (WSUS)

II. Windows Update for Business (WUfB) is a set of features new to Windows 10, designed to provide enterprises additional control over how and when Windows Update installs releases, while reducing device management costs. WUfB can be configured using MDM policies, which means they can be deployed over SCCM and other MDM solutions.

Update management using SCCM requires the Configuration Manager client, which is not supported on Surface Hub.

How many MAC addresses does Surface Hub have?
Surface Hub has an Ethernet MAC, a Wi-Fi MAC, a Bluetooth MAC, and two virtual Wi-Fi adapters that get used in the Miracast process.

How long is Surface Hub’s duty cycle?
Surface Hub can be used continuously for up to 18 hours a day. Nonetheless, Surface Hub is optimized for efficiency. To extend the life of the device, Surface Hub uses smart sensors to turn off the LCD when it detects that no one is near it, so there is no need to turn it off at the end of the day. If the unit is installed in a 24-hour traffic situation, the sensors can be disabled so that it can comply with the 18-hours-per-day requirement.

What are the Surface Hub successfully tested peripherals?
The following peripherals have been successfully tested to be used with Surface Hub after the software has been updated with the Redstone 1 (RS1) release:

- Biamp TesiraFORTÉ CI
- Jabra Speak 810
- Logitech Group
- Logitech PTZ Pro
- Polycom CX5100

Why did you choose to brand this device Surface?
Surface devices are the most productive devices on the planet. Surface 3 and Surface Pro 3 have demonstrated that, and now we continue to increase productivity with Surface Pro 4 and Surface Book. While Surface Hub is an entirely new category of device, we believe it will be the most productive device on the planet designed for group collaboration.

How can I learn more about building apps for Surface Hub?
Resources on Surface Hub app development can be found on the Microsoft Windows Dev Center.

Certifications

What are the Surface Hub Certifications and Legal Requirements?
Please ask your Microsoft Sales Lead for a copy of the Surface Hub Certifications and Key Legal Requirements document (found in Infopedia) for more information on specific certification statuses for Surface Hub.

Will Surface Hub be GSA certified?
Surface Hub is in the process of being General Services Administration (GSA) certified. Please ask your Microsoft Sales Lead for a copy of our Surface Hub Certifications and Key Legal Requirements document for more information.

Is Surface Hub on any government Approved Product List (APL)?
Surface Hub is currently awaiting verification that it has been added to the U.S. Department of Defense Unified Capabilities APL. Please ask your Microsoft Sales Lead for a copy of the Surface Hub Certifications and Key Legal Requirements document for more information.

Purchase

How much will Surface Hub cost?
At this time, Surface Hub MSRP is as follows:

<table>
<thead>
<tr>
<th>Device Size</th>
<th>MSRP Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>55&quot; Device</td>
<td>$8,999 USD</td>
</tr>
<tr>
<td>84&quot; Device</td>
<td>$21,999 USD</td>
</tr>
</tbody>
</table>

Prices will vary slightly by markets and are subject to change. Price does not include any licenses, stands, mounts or installation/integration services. Microsoft Resellers are the only entities that can confirm final pricing and delivery dates to the customer.

Will Microsoft Stores sell Surface Hub?
Select Microsoft Store locations will have Surface Hub available for business/commercial purchase. However, for the best evaluation experience, we encourage business customers to place sales request through our channel partners.

If I purchase Surface Hub through a Microsoft Store, what installation and integration options will be available?
Microsoft Stores may sell Surface Hub for commercial/business use only. Microsoft Stores will primarily provide the option of installation and integration through approved partners. Partners may vary per region/store, and options may be available at different times.

Can Microsoft Stores sell Surface Hub and Accessories for less than MSRP?
Microsoft Stores offer the MSRP price to business/commercial customers and do not offer discounts.

I am a large Microsoft customer and receive special discounts when I buy Microsoft products. Will I be able to get a discount or special pricing on Surface Hub?
Surface Hub is sold through our Authorized Device Reseller channel. Please direct questions on pricing, local pricing, promotions, and discounts to our resellers.
Warranty & Support

What is the Surface Hub return policy?
Microsoft has a No-Return policy as an OEM for Surface Hub. Nonetheless, Resellers can define their own return policy. Surface Hub Resellers may not accept a Surface Hub return unless it is a warranty issue, which is then passed on to Microsoft. We encourage you to clarify return policies with your reseller.

When does the Surface Hub warranty start?
The warranty start date for Surface Hub devices begins on the first day of the first month after the scheduled shipping date to the customer (e.g., Ship Date: April 20, Warranty Start: May 1).

Is it possible for the warranty date to start when the device is installed and activated (such is the norm in the A/V industry), as units may sit unboxed for weeks/months after shipment? No. The warranty start date for Surface Hub devices begins on the first day of the first month after the scheduled shipping date to the customer (e.g., Ship Date: April 20, Warranty Start: May 1).

What is the length of the Surface Hub Warranty?
The Standard Warranty lengths vary depending on the market and are summarized below:

<table>
<thead>
<tr>
<th>Country</th>
<th>Software Support</th>
<th>Hardware Support Device, Power Cord, Keyboard, Pen</th>
<th>Stand Replacement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia, Canada, Japan, New Zealand, Qatar, Singapore, United Kingdom, United States</td>
<td>90 Days</td>
<td>1 Year</td>
<td>1 Year</td>
</tr>
<tr>
<td>Austria, Belgium, Denmark, Finland, France, Germany, Ireland, Italy, Luxembourg, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, United Arab Emirates</td>
<td>90 Days</td>
<td>2 Years</td>
<td>1 Year</td>
</tr>
</tbody>
</table>

Full details on the Surface Hub Standard Warranty can be found on the Surface Hub Support site.

I am ordering Surface Hub devices for my U.S. and EMEA locations and want to also order for offices in countries where Surface Hub is not yet launched. Will Microsoft honor the warranty and support if I ship the units myself from the U.S./EMEA?

Yes, customers can receive support without incurring Out of Warranty fees if the customer ships the device (at the customer’s expense) to the region of installation. Out of Region support SLAs will vary based on material availability.
Is Microsoft committed to Surface Hub in the long term?
Yes, Microsoft remains committed to Surface Hub. We are encouraged about the opportunity businesses see for Surface Hub. Our customers and partners are excited about the innovative new technology and the potential they see for how it will transform the way they work across a variety of industries. We have a healthy pipeline of customers and continue to see high demand from our channel.

Surface Hub Licensing

Office 365 (O365) Licenses

Does Surface Hub come with an O365 license?
Yes, Surface Hub includes an O365 viewing license, which entitles users to view documents only for Word, Excel, and PowerPoint.

Does Surface Hub require an additional O365 license in order to create, edit, and save documents?
Yes, an eligible O365 commercial subscription is required per user in order to create, edit, and save documents in Word, Excel, and PowerPoint.

Eligible subscriptions include:

- O365 Business
- O365 Business Premium
- O365 ProPlus
- O365 E3
- O365 E4/E5

For additional information on O365 licensing models please visit https://products.office.com/en-us/business/explore-office-365-for-business or contact a representative at 1.855.270.0615.

Is the O365 commercial subscription per device or per user?
O365 is only licensed per user, not per device. Each user who creates, edits, and/or saves in Word, Excel, or PowerPoint on a Surface Hub device needs to be licensed on an O365 client subscription.

Is an additional O365 license needed for Surface Hub if we are already using O365 on our work PCs?
O365 is licensed per user, not per device. To comply with the O365 license requirements, customers deploying a Surface Hub should ensure that all users of the device are licensed on O365 if they want those users to be able to create, edit, and/or save documents on a Surface Hub. If users already have a valid O365 license, then there is no further action needed to remain complaint while using Surface Hub.

What is the licensing model of O365?

There are several plans available to meet the needs of your organization. Please visit https://products.office.com/en-us/business/explore-office-365-for-business or contact a representative at 1.855.270.0615.
**Does O365 on Surface Hub have software assurance?**

Software assurance is not applicable to O365.

**Skype for Business**

**Does Surface Hub require a license to use Skype for Business (SfB)?**

Surface Hub is SfB certified, and it requires a connection to a valid SfB Server or SfB Online subscription.


Please identify your meeting scenario from the options below to understand the SfB licensing requirements:

<table>
<thead>
<tr>
<th>Meeting scenario</th>
<th>License(s) required</th>
</tr>
</thead>
</table>
| Surface Hub will not be invited to meetings and will never initiate meetings via “meet now,” but individual users will be invited to meetings and can join from Surface Hub. | To join meetings only: SfB Online Plan 1 or SfB Server Standard Client Access License (CAL).  
To organize and join meetings: SfB Online Plan 2 or SfB Server Enterprise CAL.                                                                 |
| Surface Hub will be invited to meetings and will never initiate meetings via “meet now,” but will be authenticated into meetings.       | Surface Hub must be licensed for SfB Online Plan 1 or SfB Server Standard CAL to join meetings to which it has been invited.                           |
| Surface Hub will be used to initiate meetings via “meet now,” in addition to being invited to meetings.                           | Surface Hub must be licensed for SfB Online Plan 2 or SfB Server Enterprise CAL to initiate meetings via “meet now.”                                  |
| Surface Hub will be a meeting organizer in some instances.                      | Surface Hub must be licensed for SfB Online Plan 2 or SfB Server Enterprise CAL to be a meeting organizer.                                           |
| Surface Hub will be a meeting organizer for meetings with Public Switched Telephone Network (PSTN) Conferencing functions OR will dial out from meetings initiated with the “meet now” functionality. | In Office 365, Surface Hub must have a SfB Online PSTN Conferencing license assigned to it.  
On premises, Surface Hub must have a SfB Server Enterprise CAL assigned to it. |
Can Cloud Private Branch Exchange (PBX) and Public Switchboard Telephone Network (PSTN) User Subscription Licenses (USLs) be assigned to a Surface Hub device?

Yes, in order to use Surface Hub to dial internal or external phone numbers, it will need to have Cloud PBX and/or PSTN USLs assigned to it. Please refer to the following scenarios:

<table>
<thead>
<tr>
<th>Meeting scenario</th>
<th>License(s) required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surface Hub will be used to dial into PSTN based audio conferencing numbers hosted by others (e.g. partners, suppliers, etc.)</td>
<td>Surface Hub will need to be licensed for voice</td>
</tr>
<tr>
<td></td>
<td>• Online, this requires a Cloud PBX license to be assigned to the Surface Hub</td>
</tr>
<tr>
<td></td>
<td>• On premisess, this requires a SfB Server Plus CAL to be assigned to the Surface Hub</td>
</tr>
<tr>
<td>Surface Hub will be used to dial phone numbers (internal or external)</td>
<td>Surface Hub will need to be licensed for voice</td>
</tr>
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</tr>
</tbody>
</table>

Other Licenses

What are the Surface Hub licensing requirements for Exchange?

Surface Hub will need access to an established device account with Microsoft Exchange or Exchange Online. If you already have a licensed version of Exchange, you do not need additional licensing to use Exchange on Surface Hub.

For more information, please visit: https://products.office.com/en-us/exchange/email

Is a separate license required for the Whiteboard app?
The Whiteboard app function is based on the Exchange mailbox/Resource account, which does not currently require a separate license.

What are Surface Hub licensing requirements for the Active Directory (AD) or Azure Active Directory (AAD)?

Active Directory and Azure Active Directory are licensed per user, not per device. If users of Surface Hub are already licensed in AD or AAD, there is no further action to remain compliant while using Surface Hub.

For more information, please visit: https://azure.microsoft.com/en-us/?b=16.24
What are the Surface Hub licensing requirements for Intune, so that Surface Hub may be managed remotely?

Intune needs to be licensed per user or per device for Surface Hub.

For more information, please visit:  [https://www.microsoft.com/en-us/cloud-platform/microsoft-intune](https://www.microsoft.com/en-us/cloud-platform/microsoft-intune)

What are the Surface Hub licensing requirements for Operations Management Suite (OMS), so that Surface Hub may be managed remotely?

Surface Hub is a client device, and OMS is targeted at server Operating Systems (OS). Therefore, licensing would apply to the OS and not Surface Hub.

For more information, please visit: [https://www.microsoft.com/en-us/cloud-platform/operations-management-suite](https://www.microsoft.com/en-us/cloud-platform/operations-management-suite)

What are the Surface Hub licensing requirements for System Center Configuration Manager (SCCM), so that Surface Hub may be managed remotely?

SCCM needs to be licensed per user or per device for Surface Hub.

For more information, please visit: [https://www.microsoft.com/en-us/cloud-platform/system-centerconfiguration-manager](https://www.microsoft.com/en-us/cloud-platform/system-centerconfiguration-manager)

What are the Surface Hub licensing requirements for Windows Server Update Services (WSUS), so Surface Hub customers can manage Windows updates?

WSUS can be run by licensed Microsoft customers on a corporate network via a connection to Windows Server.


Assuming all licenses are purchased and applied to Surface Hub, how much does that add to the base hardware cost?

Please consult with your licensing/Microsoft Account Manager to determine cost.