

Mitsubishi Electric Partner Portal

Relationship Development Fund (RDF) and Claims Guide



Grow Your Business
with Mitsubishi Electric



Introduction

Mitsubishi Electric have developed a new portal which will become a “one stop shop” for all of your Partner Programme requirements.

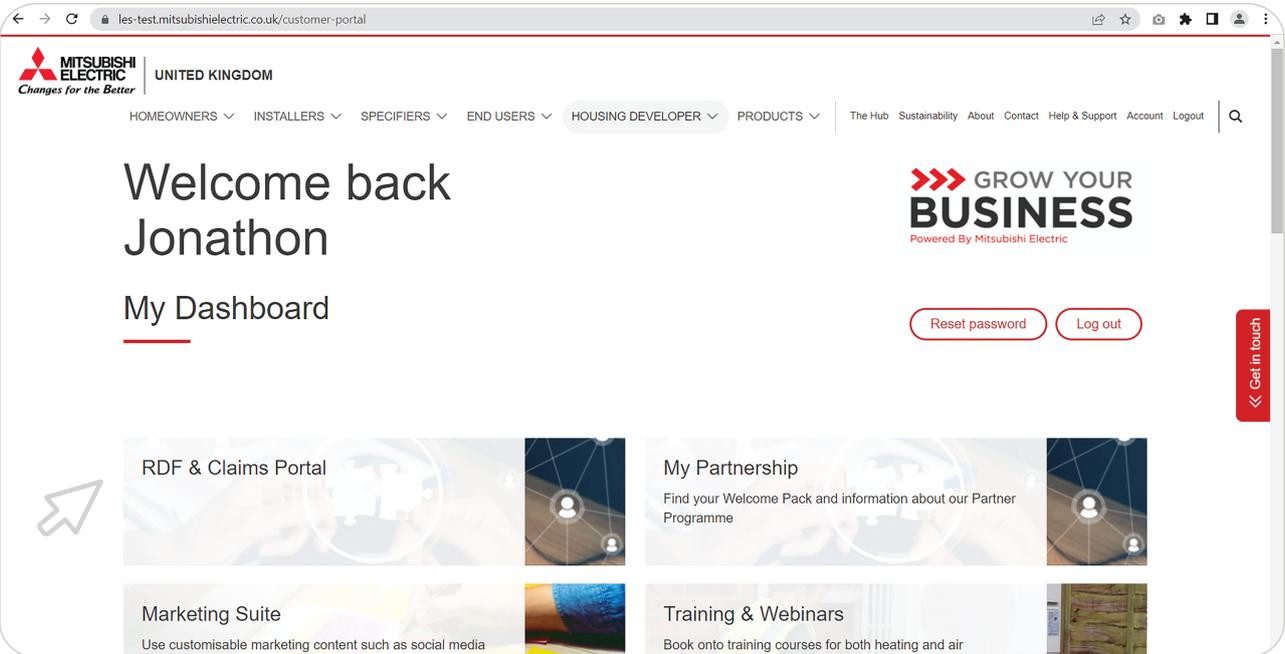
We are starting with introducing RDF and Claim management through the portal as we understand this is the area that could use the most improvement first, and other features such as Partner Upgrades and Partner Certificate downloads will follow soon.

> Logging in

You must be an active partner with Mitsubishi Electric in order to have access to this system.

You can access this system through the following link: les.mitsubishielectric.co.uk/customer-portal

Log in* and then click on the “**RDF & Claims Portal**” tile.

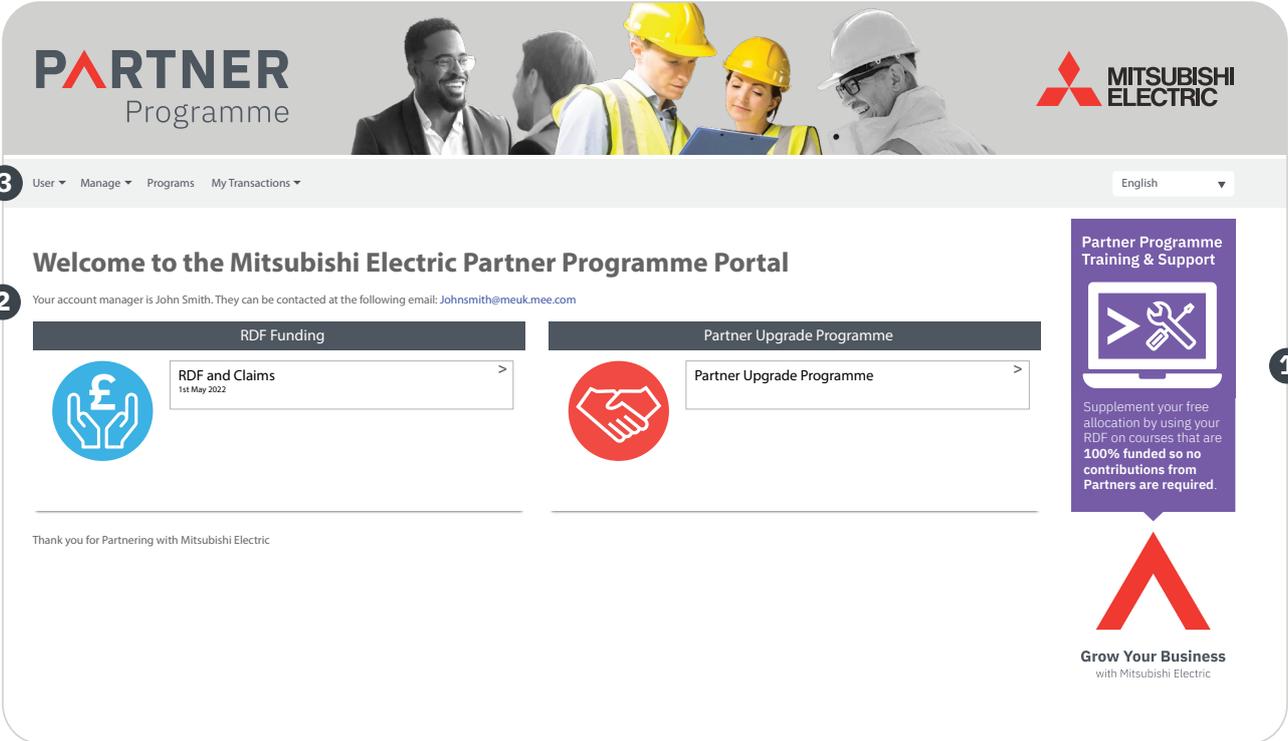


*** if you do not already have an account**, please use the “**Create an account here**” button on the Log in screen and your login details will be confirmed shortly by the Partner Programme team.



> Logging in

You will now be greeted with the following screen:



- 1 On the right, you can see a (currently purple) banner, this is regularly updated with new information about the partner portal and the programme in general, look out for interesting updates here.
- 2 You will also be able to see your **Account Managers details** underneath the welcome banner, should you need to contact them at all.
- 3 You can edit your details under the **“User”** tab.



> How to view and manage your RDF

As you will be aware we run 2x RDF periods per financial year and are calculated on the previous 6 months spend through Mitsubishi Electric and our Sales Channels.

- Period 1** RDF for the period of April to September all claims must be submitted by 16th September
- Period 2** RDF for the period of October to March all claims must be submitted by 11th March

At the start of every period, the Partner Programme team will load your RDF balances onto your account, and you will be notified by email.

Click on the **“RDF and Claims”** tile under the programs tab and and you will see the following tiles:

The screenshot shows the Partner Programme dashboard with the following elements:

- Header:** PARTNER Programme logo on the left, Mitsubishi Electric logo on the right, and navigation links (User, Manage, Programs, MyTransactions) and a language dropdown (English).
- RDF and Claims Section:** Four colored tiles:
 - Program Period:** 01 Apr - 30 Sep (purple tile with hourglass icon)
 - Available Budget:** £1,970.00 (blue tile with piggy bank icon)
 - Approved Requests:** £262.00 (green tile with hand holding dollar sign icon)
 - Approved Claims:** £262.00 (orange tile with stack of coins icon)
- Notification:** A red text box below the tiles states: "Fund Requests can be created between 1st April and 16th September 2022".
- Training & Support:** A purple box on the right titled "Partner Programme Training & Support" with a laptop icon and text: "Supplement your free allocation by using your RDF on courses that are 100% funded so no contributions from Partners are required." Below this is a red arrow pointing up and the text "Grow Your Business with Mitsubishi Electric".

Program Period

Shows you which period we are currently in.

Available Budget

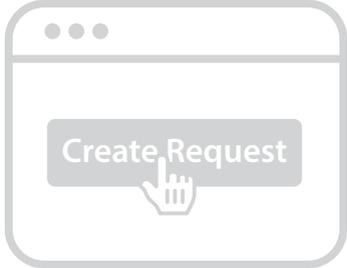
Tells you how much RDF you have remaining for this period.

Approved Requests

Tells you how many REQUESTS you have had approved.

Approved Claims

Tells you how many CLAIMS you have had approved.



> **How to submit a claim**

To submit a claim, go into the RDF and claims tile as you have previously to view your RDF.

Now click the **“Create Request”** button.



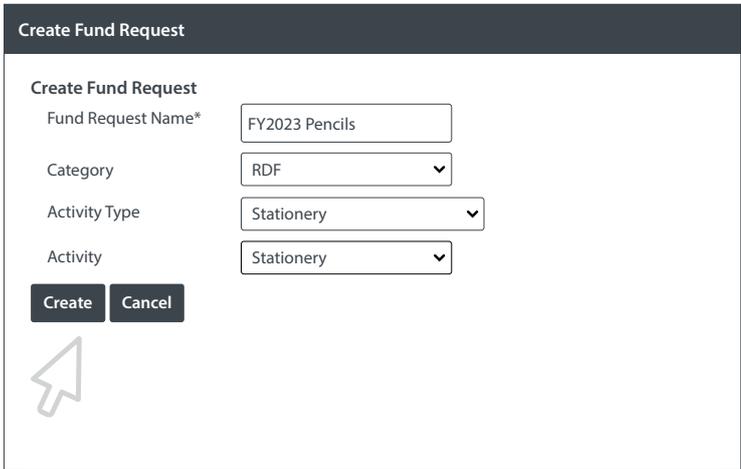
Now fill in **“Fund Request Name”** with a name that will be memorable for you, so you can easily locate your claims later.

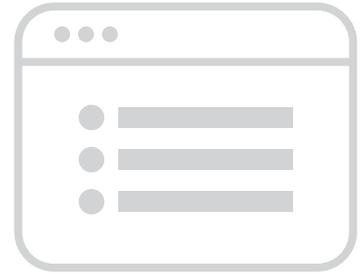
Category - RDF

Activity type - select your activity type (if you are unsure what one to pick, then please give the partner programme a call who will assist).

Activity - there should only be 1x option here so leave it as it is.

Click **“Create”**





> How to submit a claim

This will bring you through to the **Fund Request Form**.

You will see at the top there is a reminder of the cut off dates for each period.

The screenshot shows the 'Fund Request Form' interface. At the top, there is a navigation bar with the 'PARTNER Programme' logo on the left and the 'MITSUBISHI ELECTRIC' logo on the right. Below the navigation bar, there are dropdown menus for 'User', 'Manage', 'Programs', and 'My Transactions', along with a language selector set to 'English'. The main content area is titled 'Fund Request Form' and includes a red warning: 'Please ensure start and end dates are within the current period.' Below this, two bullet points specify the current periods: 'Period 1: 1st April - 16th September' and 'Period 2: 1st October - 11th March'. To the right, a 'Funds Available' table shows 'RDF' with an accrued amount of '£1970.00'. Below the table, there are two sections: 'Partner Details' and 'Request Details'. The 'Partner Details' section shows 'Partner Id: RES002', 'Company Name: MCMW Ltd', and 'Company Name: John Smith'. The 'Request Details' section shows 'Category: RDF', 'Fund Request Number: QDG703E8K1', 'Fund Request Name: FY2023 Pencils', 'Activity Type: Stationery', 'Activity: Stationery', 'Fund Request Submitted By: michelle.meetest.cm.com', and 'Fund Request Submitted Date: 19 Apr 2022'. The 'Start Date' and 'End Date' fields are highlighted with a red border and a red asterisk, both set to '20 Apr 2022'. On the right side of the form, there is a purple box for 'Partner Programme Training & Support' with an icon of a laptop and a wrench, and a red arrow pointing to the 'Grow Your Business with Mitsubishi Electric' logo.

Fill in the relevant information on the fund request form and upload your relevant documents to support your co-marketing claim such as visuals and invoice(s).

Important* You will note that the form asks for a “start” and “end” date, we understand that some activities do not have “start” and “end” dates, therefore simply enter a date range within the current period, this is a required field of the system to ensure the request is coming from the correct fund.



> How to submit a claim

Once the form is filled out like below, you can either **submit** or **save as a draft** and return later to submit (for example if you have not received visuals for your claim, you can save as a draft and when you have received visuals, simply upload them and submit claim).

User ▾ Manage ▾ Programs My Transactions ▾
English ▾

Request Details

Category	RDF
Fund Request Name	FY2023 Pencils
Activity Type	Stationary
Activity	Stationary
Fund Request Submitted By	-
Fund Request Submitted Date	
Start Date	20 Apr 2022
End Date	20 Apr 2022
Currency	GBP
Total Cost of Activity (£)	50.00
Fund Requested	25.00
Funds Approved	
Fund Request Status	
Expiration Date (claim must be submitted)	Pending Submission

Fund Request Supporting Documents

Document Type	Required	File Name	Upload Date
Invoice	<input checked="" type="checkbox"/>	TEST INVOICE.pdf	19 Apr 2022
Visual Proof	<input checked="" type="checkbox"/>	TEST VISUALS.pdf	19 Apr 2022

Upload
Submit
Save Draft

Partner Programme Training & Support

Supplement your free allocation by using your RDF on courses that are 100% funded so no contributions from Partners are required.

Grow Your Business with Mitsubishi Electric



> How to submit a claim

Your claim has now been submitted to the partner programme team for review and you will receive a **fund request number** for your records.

Once your request has been approved, you will receive an email to notify you that your request is ready to be **claimed**. Click the link in the email to review your final claim details, amend any details if necessary, such as invoices and visuals if there have been any changes. If you are happy with everything in your claim, please press **submit** at the bottom.

Upload

Submit Save Draft

Your fund request: QDG703E8K1 is pending approval

Back

Total Cost of Activity (£)	50.00
Fund Requested	25.00
Funds Approved	£25.00
Fund Request Status	Approved
Expiration Date (claim must be submitted)	30 Sep 2022

Claim Details	
Claim Requested (£)	<input type="text" value="25.00"/>
Claim approved (£)	
Fund Claim Status	Pending Submission
Claim Date	19 Apr 2022
Invoice Number	<input type="text"/>

Fund Request Supporting Documents			
Document Type	Required	File Name	Upload Date
Invoice	<input checked="" type="checkbox"/>	TEST INVOICE.pdf	19 Apr 2022
Visual Proof	<input checked="" type="checkbox"/>	TEST VISUALS.pdf	19 Apr 2022

Upload

Claim Proof of Supporting Documents			
Document Type	Required	File Name	Upload Date
Revised Visual Proof (if applicable)	<input type="checkbox"/>		
Revised Invoice (if applicable)	<input type="checkbox"/>		

Upload

Add Note Hide Note

Submit Save Draft

You will now receive confirmation that your claim has been completed. The Partner Programme team will now raise the credit to your Mitsubishi Electric account or Sales Channel where applicable. You will receive email confirmation once complete.

Confirmation

Your fund claim is successfully submitted and pending. We'll be in touch when it is approved.

Return



> How to view and manage your claims

The new portal offers a feature where you can now track your claims and view your previous claims and get information such as credit numbers at the click of a few buttons.

Go through to **Programs Tab** and click on the **RDF and Claims** tile again, towards the bottom of the page, you will find a table of all your current and previous fund requests.

Request Number	Request Name	Request Date	Activity Start Date	Activity End Date	Requested Amount	Approved Amount	Approved Claim Amount	Budget Period	Category	Activity	Request Status	Claim Status	Claim Date	Expiration Date	Action	Cancel
IATEL388HM	FY2023 Pencils	19 Apr 2022	20 Apr 2022	20 Apr 2022	€25.00	€0.00	€0.00	Apr 22 - Sep 22	RDF	Stationary	Cancelled				View	
ODG703E8K1	FY2023 Pencils	19 Apr 2022	20 Apr 2022	20 Apr 2022	€25.00	€25.00	€25.00	Apr 22 - Sep 22	RDF	Stationary	Approved	Approved	19 Apr 2022	30 Sep 2022	View	
GOKVSM363P	training test 1104	11 Apr 2022	12 Apr 2022	12 Apr 2022	€10.00	€10.00	€10.00	Apr 22 - Sep 22	RDF	Internal Training	Approved	Approved	11 Apr 2022	30 Sep 2022	View	
2TP99DO9VO	test MW 1104	11 Apr 2022	20 Feb 2023	27 Feb 2023	€10.00	€10.00	€10.00	Oct 22 - Mar 23	RDF	Offline advertising	Approved	Approved	11 Apr 2022	30 Sep 2022	View	
5HZUJVOH05	Test MW 0904	09 Apr 2022	19 Apr 2022	26 Apr 2022	€10.00	€10.00	€10.00	Apr 22 - Sep 22	RDF	Literature	Approved	Approved	11 Apr 2022	30 Sep 2022	View	
1KGU99XF10	FAQ test 1	05 Apr 2022	06 Apr 2022	06 Apr 2022	€0.00	€0.00	€0.00		RDF	Online Advertising	Rejected				View	
98UJV3UCS	FAQ test 1	05 Apr 2022	11 Apr 2022	11 Apr 2022	€1.00	€0.00	€0.00		RDF	Online Advertising	Cancelled				View	
LBGY7FF2AA	RL TEST	30 Mar 2022	31 Mar 2022	01 Apr 2022	€2.50	€2.50	€2.50	Oct 21 - Mar 22	RDF	Co-Funded Event	Approved	Approved	30 Mar 2022	01 May 2022	View	
SDJMGNF44B	FAQtest	29 Mar 2022	30 Mar 2022	30 Mar 2022	€0.50	€0.50	€0.50	Oct 21 - Mar 22	RDF	Own Premises Equipment	Approved	Approved	29 Mar 2022	29 Apr 2022	View	
NPLQI8Q8GR	resilosnay	28 Mar 2022	31 Mar 2022	31 Mar 2022	€5.00	€5.00	€5.00	Oct 21 - Mar 22	RDF	External Training (DGP Partners Only)	Approved	Approved	28 Mar 2022	30 Apr 2022	View	

Page Size: 10 | 43 items in 5 pages

You can filter this table using the filters in the top row, so you can search for specific requests to see the current status, and find the credit note numbers, or if you want to report on your RDF usage from the previous periods, simply enter the period you want to report on in the filters and the table will show you all of the requests from the relevant period.

You can also see which requests require action from you to submit your claim, or if we are still to approve any requests, ready for you to claim.

If you have any questions please contact the Partner Programme team, partner@meuk.mee.com



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Note: The fuse rating is for guidance only. Please refer to the relevant databook for detailed specification. It is the responsibility of a qualified electrician/electrical engineer to select the correct cable size and fuse rating based on current regulation and site specific conditions. Mitsubishi Electric's air conditioning equipment and heat pump systems contain a fluorinated greenhouse gas, R410A (GWP:2088), R32 (GWP:675), R407C (GWP:1774), R134a (GWP:1430), R513A (GWP:631), R454B (GWP:466), R1234ze (GWP:7) or R1234yf (GWP:4). *These GWP values are based on Regulation (EU) No 517/2014 from IPCC 4th edition. In case of Regulation (EU) No.626/2011 from IPCC 3rd edition, these are as follows. R410A (GWP:1975), R32 (GWP:550), R407C (GWP:1650) or R134a (GWP:1300).

Effective as of April 2022

