



Service Renewals Quoting and Ordering and Support

Purpose

The purpose of this document is to provide partners and distributors with best practice tips and resources available to effectively and independently use Cisco service renewal tools and support processes.

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Section 1: Services Quoting/Ordering and Support Checklist

The first step is to gain access separately to the following tools. **For more information on how to gain access, see the corresponding best practices sections.**

- **Cisco Service Contract Center (CSCC):** 1-Tier Partners and distributors selling distribution consumption
- **SCC for Indirect Resellers and Distributors (SMS3):** Distributors and 2-Tier Partners
- **Performance Metrics Central (PMC):** All partners and distributors
- **Service Support Center (SSC):** All partners and distributors
- **Technical Assistance Center (TAC):** All partners and distributors

✓	Audience	Key Area	Steps	Resources Available
	1-Tier Partners <i>Target: Quoting/ Ordering Agents</i>	1. Cisco Service Contract Center (CSCC): CSCC provides 1-Tier Partners with a streamlined and globally consistent method to order, manage and register new and renewal contracts.	<ol style="list-style-type: none"> 1. Gain access to CSCC (see Best Practices section). 2. Take training on CSCC. 3. Order and renew Cisco Services through CSCC, as well as manage existing service contracts. 4. Request support as needed through Service Support Center (SSC). 	<ul style="list-style-type: none"> • 1-Tier Partner Access Checklist • CSCC Partner Training Website • Service Support Center CSCC Community Site
	Distributors 2-Tier Partners <i>Target: Quoting/ Ordering Agents</i>	2. SCC for Indirect Resellers and Distributors (SMS3): SMS3 provides distributors and 2-Tier Partners with a streamlined and globally consistent method to order, manage and register new and renewal contracts.	<ol style="list-style-type: none"> 1. Gain access to SMS3 (see Best Practices section). 2. Take training on SMS3. 3. Order and renew Cisco services through SMS3, as well as manage existing service contracts. 4. Request support as needed through Service Support Center (SSC). 	<ul style="list-style-type: none"> • 2-Tier Partner Access Checklist • SMS3 Partner Training Website • Service Support Center SMS3 Community Site
	1-Tier Partners Distributors	3. Performance Metrics Central (PMC): PMC provides partners with on-demand visibility into relevant service metrics and operational indicators to help better manage service performance.	<ol style="list-style-type: none"> 1. Gain access to PMC (for instructions, see the Cisco PMC User Guide, section 3, page 8). 2. Take training on PMC. 3. Use PMC to view service metrics. 4. Request support as needed through Service Support Center (SSC). 	<ul style="list-style-type: none"> • Cisco PMC User Guide • PMC Partner Training Website • Service Support Center PMC Community Site
	All (1-Tier Partners, Distributors, 2-Tier Partners) <i>Target: Quoting/ Ordering Agents</i>	4. Service Support Center (SSC): The SSC Community is a collaborative environment for customers and partners to explore self-service materials and receive help with technical questions on CSCC, SMS3, and PMC.	<ol style="list-style-type: none"> 1. Sign up for access to SSC (see Best Practices section). 2. Learn to use the SSC community site to troubleshoot common problems. 3. Learn to open an SSC case for questions not answered through materials on the site. 4. Leverage the SSC community and case support as needed. 	<ul style="list-style-type: none"> • SSC Community Site • SSC Community Training Videos • Open an SSC case

✓	Audience	Key Area	Steps	Resources Available
	All (1-Tier Partners, distributors, 2-Tier Partners) <i>Target: Support Engineers</i>	5. Technical Assistance Center (TAC): Contact Cisco TAC for help with technical support for products, RMAs/DOAs, and software licensing/release keys.	<ol style="list-style-type: none"> 1. Sign up for access to TAC (see Best Practices section). 2. Learn how to open a TAC case. 3. Learn how to request a software license release key. 4. Open TAC cases to receive technical support as needed. 	<ul style="list-style-type: none"> • Technical Assistance Center • Technical Support Reference Guide for Cisco TelePresence Products • Activation Key Process Self Service Guide

Section 2: Services Quoting/Ordering and Support – Best Practices

Cisco Service Contract Center

Activity	Best Practice Tips	Resources Available
Access CSCC	<p>To access CSCC, follow instructions in the CSCC 1-Tier Partner Access Checklist.</p> <p>Review system recommendations in “Guidelines for Optimal Performance” (section 1.1 of “Navigation and Basics” in the CSCC User Guide) to help ensure system compatibility with CSCC.</p>	<ul style="list-style-type: none"> • 1-Tier Partner Access Checklist • CSCC User Guide
Get Trained	<p>Get started on the CSCC Partner Training Website:</p> <ul style="list-style-type: none"> • Follow the training curriculum designed for your organization type and role (partner, reseller, direct customer, etc.) • View the short videos (VoDs) under the “Getting Started” tab • Visit the role-based training relevant to your position in your company <p>In addition, contact your Cisco Representative to sign up for any CSCC training courses offered.</p>	<ul style="list-style-type: none"> • CSCC Partner Training Website <ul style="list-style-type: none"> ◦ Training Curriculums ◦ “Getting Started” VoDs ◦ Role-based Training
Perform Basic Set-up Steps	<p>Before you begin quoting and ordering in CSCC:</p> <ul style="list-style-type: none"> • Set your default Bill to ID (BID) • Set your default service level <p>Use the Address Management Tool to:</p> <ul style="list-style-type: none"> • Save most frequently used Site IDs in your address book • Check the Service Availability Matrix (SAM) for spelling and postal code of the site address • If you have a large number of sites to create, open a case with Customer Service <p>Note: Before creating an estimate or quote, run a SNIF search on the serial numbers you plan to estimate or quote to check for the following:</p> <ul style="list-style-type: none"> • Serial numbers are valid • Current coverage start and end dates do not overlap • Current Site ID matches with your data • No end-of-sale (EOS) items beyond 1 year past the EOS date are included in the quote • Serial number belongs to you 	<ul style="list-style-type: none"> • Setting Preferences Tip Sheet • Service Availability Matrix (SAM) • SAM Introductory Training • Address Management Tip Sheet • Cisco Customer Service • Serial Number Information Finder (SNIF) Training

Activity	Best Practice Tips	Resources Available
Create an Estimate	Before creating an estimate, prepare the following required information: <ul style="list-style-type: none"> • Product ID (serial number <i>is not mandatory</i> to create an estimate, but <i>is mandatory</i> to convert an estimate to a quote) • Service Level • Destination Country (Site ID <i>is not mandatory</i> to create an estimate, but <i>is mandatory</i> to convert an estimate to a quote) 	<ul style="list-style-type: none"> • Estimates and Quotes Overview • Estimates/Quotes Job Aid • Creating an Estimate (Quick Quote) Tip Sheet
Create a Quote	Before creating a quote, prepare the following required information: <ul style="list-style-type: none"> • Serial numbers list (or Product ID if quoting a software service level) • Service Level • Site IDs • Begin/End date for the coverage 	<ul style="list-style-type: none"> • Estimates and Quotes Overview • Estimates/Quotes Job Aid • Quoting Basics Tip Sheet
Complex Quoting Scenario: Takeovers	Tips for creating a takeover quote: <ol style="list-style-type: none"> 1. Run a SNIF report 2. In the Quote Summary Details screen, save the quote 3. Perform takeover action in “Action” dropdown menu 4. Accept the takeover agreement popup 5. Import serial numbers 	<ul style="list-style-type: none"> • CSCC Takeovers Job Aid • Serial Number Information Finder (SNIF) Training
Convert Quote to Order / Error Management	To help resolve errors in CSCC, visit the Complete CSCC Error Guide, Common Quoting Error and Resolution Guide, as well as the “Community Search” function in the SSC community site	<ul style="list-style-type: none"> • Complete Error Guide • Common Quoting Errors and Resolution Guide • SSC Community Site
Manage Contract	To access contracts that are not visible to you, register for the contract in CSCC. Review the CSCC User Guide to learn how to perform these common contract management tasks: <ul style="list-style-type: none"> • Move products to new install site • Merge migrated contract with existing Cisco contract • Move product(s) from one contract to another • Add uncovered product to service contract • Align service coverage end-date upon renewal • Add a “Do Not Renew” designation to an End of Service product • Edit serial number / PAK number on service contract for Return Material Authorization (RMA) 	<ul style="list-style-type: none"> • Contract Management Job Aid • CSCC User Guide

SCC for Indirect Resellers and Distributors

Activity	Best Practice Tips	Resources Available
Access SMS3	<p>To access SMS3, distributors and resellers should follow the steps outlined in the SMS3 Access Guide. For more information, refer to the appropriate user guide.</p> <p>Recommendation: Create as few CCO IDs as possible to ensure that you manage the minimum number of accounts. For example, you can create two role-based generic profiles; one for sales and another for purchasing.</p>	<ul style="list-style-type: none"> • SMS3 Access Guide • User Guide for Resellers • User Guide for Distributors
Get Trained	<p>For SMS3 training, visit the SMS3 distributor and reseller training site. Begin by viewing the SCC for Indirect Resellers and Distributors New Quoting Overview. You can also follow the training curriculum designed for your role (distributor or reseller).</p> <p>Distributors can also access training directly through Cisco. Contact your Cisco representative to find the latest resources and live training sessions available. Resellers should obtain live training through their distributor.</p>	<ul style="list-style-type: none"> • SMS3 Distributor and Partner Training Site • SCC for Indirect Resellers and Distributors New Quoting Overview • Reseller Training Curriculum • Distributor Training Curriculum
Access Contracts	<p>To access contracts that are not visible to you, register for the contract in CSCC (directly accessed via SMS3 through the "Contracts" tab; visit the CSCC User Guide for more information).</p>	<ul style="list-style-type: none"> • CSCC User Guide
Create a Quote: Serial Numbers	<p>Before you create a quote, validate your serial numbers by:</p> <ul style="list-style-type: none"> • Searching for the serial number in CSCC (if you have access to this tool) • Double checking the serial number on your proof of purchase (e.g. Purchase Order, Sales Order) <p>If you find a serial number that is valid but not available for quoting in SMS3, open a case with SSC (via the Service Support Center "Get Help" page).</p> <p>Serial numbers are <i>required</i> for quoting, but <i>not required</i> to generate an estimate.</p>	<ul style="list-style-type: none"> • CSCC Serial Number Search Tip Sheet • Service Support Center "Get Help" Page
Create a Quote: Install Sites	<p>When creating a quote, check that the end customer site information is accurate. The Bill-To-ID (BID) should be that of the reseller to ensure correct entitlement. If a contract has the incorrect BID information, open a case with the SSC.</p> <p>If the quote contains an international site and there are required fields not applicable for the local site, open an SSC case to ensure that the correct install site information is captured.</p>	<ul style="list-style-type: none"> • Service Support Center "Get Help" Page
Create a Quote: Coverage Period	<p>When creating a quote, ensure the coverage period does not overlap with coverage on an existing contract.</p> <p>See the "Quoting/Ordering" section of the SMS3 Distributor and Reseller training site for more information.</p>	<ul style="list-style-type: none"> • SMS3 Distributor and Partner Training Site – Quoting/Ordering
Complex Quoting Scenario: Takeovers	<p>Before building a takeover quote, obtain the contract number and end customer information from the end customer or reseller required for the quote.</p> <p>See section 3.2.2 (Takeover Quote) in the User Guide for Reseller and section 3.2.5 (Generating a Takeover Quote) in the User Guide for Distributors for more information.</p>	<ul style="list-style-type: none"> • User Guide for Resellers • User Guide for Distributors
Manage your Contracts	<p>Learn how to perform common SMS3 contract management tasks, including:</p> <ul style="list-style-type: none"> • Making contract updates • Moving products • Searching for uncovered products <p>Visit the "Contract Management" section of the SMS3 Distributor and Reseller training site and the SMS3 Contract Management Job Aid.</p>	<ul style="list-style-type: none"> • SMS3 Contract Management Training • SMS3 Contract Management Job Aid

Service Support Center

Activity	Best Practice Tips	Resources Available
Use the SSC Community Site	<p>Use the SSC Community Site (including communities for CSCC, SMS3, and PMC) as your first-stop to troubleshoot issues with Cisco services renewal ordering tools.</p> <p>You <i>do not</i> need an existing login to access the SSC Community Site. However, you <i>do need</i> a login to open a case with SSC.</p> <p>Watch the SSC Community Training Videos to learn how to utilize the SSC Community Site.</p>	<ul style="list-style-type: none"> • Service Support Center Community Site • Service Programs and Acquisitions Community Site • SSC Community Training Videos
Access SSC	<p>Before opening a support case with SSC, create an account:</p> <ol style="list-style-type: none"> 1. Navigate to the SSC “Get Help” page 2. Click on “Open a Case” in the “Case Management” section 3. Click on “Create a New Account” in the page that opens 4. Complete the form and click on “Create Account” <p>After you have completed these steps, use your username and password to log into SSC to open cases and participate in forums.</p>	<ul style="list-style-type: none"> • Service Support Center “Get Help” Page
Open an SSC Support Case	<p>To open a support case with SSC:</p> <ol style="list-style-type: none"> 1. Navigate to the SSC “Get Help” page 2. Click on “Open a Case” in the “Case Management” section 3. Log in with your account email address and password <ul style="list-style-type: none"> Note: The webpage may pause for a few seconds before proceeding to the next page, “Submit a question to our support team.” 4. On the next page, for a TANDBERG-related inquiry, <ul style="list-style-type: none"> Select “Service Programs/Acquisitions” in the “Category” menu. Select “TANDBERG” in the “Request Type” drop down; you will also be required to select a sub-type (either “General Quoting/Ordering questions” or “Support”) 5. Complete the remaining fields in the request: <ul style="list-style-type: none"> Include your Partner Company name in the “Subject” field and when appropriate, include your Cisco Contract Number. 6. Describe the issue you are encountering; make sure to provide as much detail as possible (e.g. error code) and any supporting documents 7. Click “Continue.” 8. The “Finish submitting your question” popup will appear with the message “Your question hasn’t been submitted yet.” <ul style="list-style-type: none"> Note: This window provides links to self-serve materials based on the issue you described; you can use these to troubleshoot before submitting the case. 9. If none of these apply or are able to resolve your issue, click on “Finish Submitting Question” to submit the SSC case. <ul style="list-style-type: none"> Note: You can also click “Back” to edit your issue description. 	<ul style="list-style-type: none"> • Service Support Center “Get Help” Page

Technical Assistance Center (TAC), Return Material Authorization (RMA), and Software Licensing Release Keys

Activity	Best Practice Tips	Resources Available
Access TAC Requests	<p>To access Cisco technical support:</p> <ol style="list-style-type: none"> 1. Obtain a Cisco.com user ID (only if you don't already have one) 2. Link your new contract number to your Cisco.com user ID before contacting TAC. <p>Note: If you have a large number of contracts to link, use the Service Access Management Tool (SAMT)</p> <p>Detailed instructions on opening TAC requests are included in the "Your New Service Request Process: Technical Support Reference Guide for Cisco TelePresence Products" document.</p> <p>If you are experiencing trouble while opening a case online using the TAC Service Request Tool (TSRT), call the hotline at 1.800.553.2447(U.S.). For worldwide support numbers, refer to Cisco worldwide contacts.</p>	<ul style="list-style-type: none"> • Your New Service Request Process: Technical Support Reference Guide for Cisco TelePresence Products • Worldwide TAC contact information
Open a TAC Request	<p>Contact TAC for help with:</p> <ul style="list-style-type: none"> • Technical support for products • RMAs/DOAs • Software Licensing/Release Keys <p>When you open a case with TAC, provide as much detail about your request, including your company name and the contract number, if known.</p>	<ul style="list-style-type: none"> • Technical Assistance Center
Associate Multiple BIDs or Contracts	<p>To associate multiple BIDs or contracts for TAC entitlement purposes, use the Service Access Management Tool to manage access to the services provided by your contracts (e.g., TAC support, hardware replacement). It is ideal for organizations that want to manage and associate multiple Cisco.com profiles. This management can be done either using the Bill to ID or contract number.</p> <p>To manage access by Bill to ID, the Bill to ID must be in your Cisco.com profile and selected (enabled) for support access. To manage access by contract number, a contract number must be in your Cisco.com profile to obtain service.</p>	<ul style="list-style-type: none"> • Service Access Management Tool
Get Software License and release Keys	<p>To obtain license and release keys, use the Cisco Product License Registration tool. Prepare your PAK code (sent by Cisco via email) when accessing this website.</p> <p>Review the Activation Key Process Self Service Guide to obtain and install activation keys.</p>	<ul style="list-style-type: none"> • Product License Registration Tool • Activation Key Process Self-Service Guide • Cisco Global Licensing Operations FAQs

Section 3: Additional Information: Partner Resources for Cisco Services

Category	Tool/Process	Self-Serve Support Resource	Additional Cisco Support
General Resources	Service and support for TANDBERG Integration	<ul style="list-style-type: none"> TANDBERG Acquisition Support Website Partner FAQ: Cisco Services for TANDBERG Migration 	Various (See Below)
General Resources	Cross-reference TANDBERG and Cisco Product SKUs	<ul style="list-style-type: none"> Cisco Acquisition Part Number Cross Reference Tool 	Service Support Center "Get Help" Page
Service Renewal Ordering Tool	Look up contract or serial number in CSCC	<ul style="list-style-type: none"> CSCC Serial Number Search Tip Sheet Serial Number Information Finder (SNIF) Training Note: Standard Cisco serial format is 3 letters, followed by 8 numbers and letters; it does not contain an "S" at the beginning. 	Service Support Center "Get Help" Page
General Resources	Multi-year Discounts	<ul style="list-style-type: none"> Multiyear Contracts in the Consolidated Services Programs Operating Practices Guide (pg. 6) 	Service Support Center "Get Help" Page
Service Renewal Ordering Tool	Takeover Quoting and Ordering in CSCC	<ul style="list-style-type: none"> CSCC Takeover Job Aid Partner Contract Takeovers in the Consolidated Services Programs Operating Practices Guide (pg. 10) 	Service Support Center "Get Help" Page
Service Renewal Ordering Tool	Multi-national Quoting	<ul style="list-style-type: none"> GPN Website GPN Partner Locator Tool CSCC Multi-National Quoting Job Aid Cross Border, Cross-Country Selling in the Consolidated Services Programs Operating Practices Guide (pg. 20) 	Service Support Center "Get Help" Page
Service Tool	Partner Metric Central (PMC)	<ul style="list-style-type: none"> PMC Partner Training Site PMC Service Support Community Site Ongoing Eligibility and Metrics in the Partner Core-Bridge Program Guide (pg. 6) Metrics Phase-in in the Consolidated Services Programs Operating Practices Guide (pg. 4) 	Service Support Center "Get Help" Page
Service Tool	Service Availability Matrix (SAM)	<ul style="list-style-type: none"> SAM Introductory Training 	Service Support Center "Get Help" Page
Product /Services Ordering Tool	CCW, Marketplace Ordering Tool	<ul style="list-style-type: none"> CCW Partner Training Site Ordering Tool User Guide 	Partner Help Desk
TAC	Software license/release keys and RMA license transfer activation	<ul style="list-style-type: none"> Product License Registration Tool (also known as SLFEXT) Activation Key Process Self-Service Guide Cisco Global Licensing Operations FAQs 	Contact GLO through TAC TSRT (indicate software licensing issue) or email licensing@cisco.com
TAC	Product technical support, RMA/DOA	<ul style="list-style-type: none"> Your New Service Request Process: Technical Support Reference Guide for Cisco TelePresence Products Partner "What to Expect" Session 1 Partner "What to Expect" Session 2 	TAC TSRT

Category	Tool/Process	Self-Serve Support Resource	Additional Cisco Support
TAC	Service Access Management Tool (SAMT)	<ul style="list-style-type: none"> • Service Access Management Overview Page (including Training) 	TAC TSRT
Cisco Pricing	Cisco Product/Service Pricing	<ul style="list-style-type: none"> • Cisco Pricing Tool • Accessing TelePresence Pricing: Quick Reference Guide 	Service Support Center "Get Help" Page



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