



Cisco[®] Shared Support for Latin America and Caribbean (LATAM)

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Introduction

This Cisco® Shared Support Program User Guide provides detailed program information to:

- Understand the fundamentals and elements of the program
- Direct you to available tools and links
- · Help you understand the necessary business processes involved in participating in Cisco Shared Support

Although not all inclusive, this guide is designed as an aid to help you implement the Cisco Shared Support program.

Cisco Shared Support Overview and Definitions

What is the Partner Technical Support Services Portfolio?

The new Partner Technical Support Services (PTSS) Portfolio has been developed to replace the existing partner branded services programs.

The programs offered under the PTSS Portfolio for the growth markets are:

- **Cisco Shared Support** for Gold, Silver, and select Premier certified partners¹ who meet Cisco Shared Support eligibility criteria and demonstrate their ability to sell, renew and deliver high-quality service under their own brand
- **Cisco Brand Resale** (as a complement to Cisco Shared Support) through which partners can resell Cisco brand services

The new portfolio clearly recognizes partners' skills and investment and rewards performance.

Cisco Shared Support recognizes the partners' investment in services by applying strong eligibility requirements and monitoring on-going performance. This enables more differentiation in the marketplace and helps improve both partner and Cisco profitability via cost reduction (discounts and logistical costs.)

Cisco Shared Support is an annuity-based program, which means that a partner pays for each service contract annually. In contrast to previous Cisco partner-brand programs that required the partner to pay a one-time fee up front, in Cisco Shared Support service contracts are sold under a full entitlement in year one, and under a selective entitlement model the following years.

Cisco Shared Support partners may also use Cisco Brand Resale, based on their logistics geographic reach or leverage Cisco's technological expertise in the introduction of new technologies. This allows partners to expand their market share without engaging in delivering services.

End customers can better select partners that meet Cisco's high quality standards and this will contribute to increased customer satisfaction.

¹ Select premier partners in LatAm have been invited to participate in the Cisco Shared Support program

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What is the PTSS Portfolio replacing?

The PTSS Portfolio replaces the following partner-branded programs:

• System Integrator Support (SISE/SIS98)

Why was the PTSS Portfolio created?

The PTSS Portfolio is designed as a blend of partner brand and Cisco brand service programs. The purpose of introducing a blended portfolio of programs is to strengthen services awareness, develop value and overall customer satisfaction through partners and simultaneously introduce Cisco's brand of services as a valuable option.

The PTSS Portfolio is designed to address the key concerns of the previous partner branded programs:

- Partners bundled SIS98 with products, essentially giving the service away and driving down its value, or "street price."
- SIS98 did not require partners to meet eligibility requirements or performance metrics around service coverage, service efficiency, or service quality. The result was a large field of partners competing for customers, some undercutting others on price. Undercutting, combined with a lack of accountability for service delivery, caused customer satisfaction ratings for partner-delivered service to lag behind ratings for Cisco-delivered service.

The PTSS Portfolio is also designed to increase services maturity and value in the growth and emerging markets, as well as move partners to an annuity business versus the previous model of a "one-time fee." With the introduction of the PTSS Portfolio, Cisco is introducing choice into a market where services have been typically perceived as low value but highly priced.

Portfolio Value to the Partner and Customer

The Cisco Shared Support program, with Cisco Brand Resale as a complement, enables Gold, Silver, and select Premier certified partners to offer their unique service portfolio and build on their core competencies by leveraging Cisco's technical expertise and parts logistics infrastructure to maximize profitability.

Cisco Shared Support partners offer their own brand of services and provide Technical Assistance Center (TAC) Level 1 support, TAC Level 2 support, and onsite support. The partner determines to what extent they will leverage Cisco's parts logistics infrastructure.

Cisco Shared Support partners may choose to complement their portfolio of services by using Cisco Brand Resale to expand their geographic reach, provide advanced technology support or accommodate customer preference.

Cisco Systems, Inc. All contents are © 2004 Cisco Systems, Inc. All Rights Reserved. Page 4 of 89 Table 1 provides a framework of deliverables under Cisco Shared Support and Cisco Brand Resale.

Table 1. Partner and Cisco Deliverables Under Cisco Shared Support and Cisco Brand Resale

Deliverables	Cisco Shared Support	Cisco Brand Resale
Service sales	Partner provides to customer	Partner provides to customer
Contract administration	Partner provides to customer	Partner provides to customer
_Contract renewals and upgrades	Partner provides to customer	Partner provides to customer
Technical Assistance Center (TAC) _Levels I and II support	Partner provides to customer	Cisco provides to customer
TAC Level III support	Cisco provides to partner	Cisco provides to customer
Cisco.com	Cisco provides to partner, partner administers to customer	Cisco provides to customer
Cisco IOS [®] Software maintenance, minor, and major releases	Cisco provides to partner, partner administers to customer	Cisco provides to customer
Software Application Support; two options: • Standard offering: SAS— maintenance and minor releases • Upsell offering: Software Application Support plus Upgrades (SASU)—maintenance, minor, and major releases	Cisco provides to partner, partner administers to customer	Cisco provides to customer
 Parts delivery*: two options: Standard offering: 8x5xSDS/NBD where available Upsell offering: 8x5x4, 24x7x4*** 	Cisco provides to partner or customer as indicated by partner at time of purchase	Cisco provides to customer
Onsite hardware replacement*	Partner provides to customer**	Cisco provides to customer***

*Parts shipment is either delivered by Cisco to the partner's depot or by Cisco to the customer directly. For parts to end user, service levels may vary per country. Please confirm service level availability with your local Cisco Representative.

Partner can outsource Onsite Services and use Cisco Onsite Services (where available) in case emergency occurs. Partner would have to pay Time and Materials if partner leverages Cisco Onsite Services. *Where available.

What are the benefits to the partner?

The PTSS Portfolio offers partners the following benefits:

- Recognizes the quality of service delivered by partners as reflected in customer satisfaction scores and • service performance, and rewards partners based on their performance
- Promotes and sustains partner differentiation through eligibility criteria and ongoing performance metrics
- Enables partners to utilize the Cisco parts-logistics infrastructure to support specific products or to expand . geographical reach
- May help partners improve cash flow through an annuity-based fee structure ٠

What are the benefits to the customer?

Cisco Shared Support provides the following benefits to the end customer:

- One primary contact for a complete support solution
- Improved network availability and reliability •
- Investment protection through software updates and upgrades •
- Improved contract and asset management

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Program Elements

What are the program elements of Cisco Shared Support?

The four elements of Cisco Shared Support are:

- Eligibility
- Performance Metrics
- Pricing
- Delivery

This section of the user guide provides more detail on each of these four elements.

Eligibility and Certification

Eligibility is a set of criteria used to evaluate and determine a partner's qualifications to participate in Cisco Shared Support. These requirements help enable partner differentiation in the marketplace as well as promote more efficient service delivery leading to higher quality of support and increased customer satisfaction. This eligibility is aligned with the channel certification programs.

What are the criteria to participate in Cisco Shared Support?

LATAM
Entry and Year 1
Gold, Silver and select Premier certified partners
8x5 local TAC capability
Online ordering and case management
Take the Partner Readiness Assessment
Year 2 and Ongoing
Meet or exceed performance metrics thresholds
Automated asset management system
24x7 local TAC capability

What is the Partner Readiness Assessment?

You will be requested to complete the Partner Readiness Assessment (PRA) for participation to the Cisco Shared Support Program. The PRA is a survey that partners can complete to assess their business and systems capabilities as they relate to Cisco Shared Support. The survey contains questions for each phase in the process enabling the measurement of partner capabilities today and twelve months out. In addition, this tool:

• Assists SAMs, CSAMs and SBDMs in helping partners measure the maturity of their business capabilities as it relates to service delivery and management

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- Provides insights into a partner's capabilities by identifying areas of strength and opportunity at the process level.
- · Provides insights to the asset management and contract management capabilities
- Identifies gaps or specific areas for process improvements

Cisco Shared Support

Key Highlights

 Table 3.
 Cisco Shared Support Key Highlights

Cisco Shared Support
Annuity-based contracts
First year of product life:
Full entitlement—purchase service on all product at time of order
Second year of product life and onward:
Selective renewal—purchase service only on products for which customer renews service
Pricing is based on discount off SMARTnet and Software Application Support/Software Application Support plus Upgrades (SAS/SASU) support price lists
Discount is driven by partner's performance
Multiple hardware service options: Same-day shipment (SDS)/Next business day (NBD)/4 hour where available
Gradual entitlement enforcement

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Performance Metrics

Why Have Performance Metrics?

The Cisco Shared Support performance metrics have been developed to promote strong partner performance in services sales, delivery and end-customer satisfaction. This program is designed for partners who have a strong brand presence, routinely sell and renew service as part of their overall business strategy and provide additional program value-add beyond traditional break/fix. The primary objectives of the Cisco Shared Support metrics are to:

- Motivate the partner to sell and renew service. The metrics provide significant incentive to ensure service is initially sold as part of the hardware/software sale and to ensure continued investment in service growth through renewal management
- Measure value exchange between the partner and Cisco. Value exchange means that the price the partner pays for Cisco Shared Support services directly relates to the partner's ability to reduce Cisco's operating expense in delivering service to the end-customer. The Cisco Shared Support program offers the partner the opportunity to perform certain service and support functions in exchange for deeper discounts.
- **Highlight the importance of end-customer satisfaction.** The metrics emphasize the responsibilities of the partner to deliver quality service to the end-customer.

Cisco Shared Support performance metrics do not replace any existing metric programs. This includes metrics related to partner certification criteria and operational excellence initiatives. However, partners failing to maintain Cisco Shared Support eligibility will lose certification.

Performance Recognition

Cisco Shared Support is a performance-based program. The partner's performance is monitored through a set of metrics that:

- Measure the partner's ability to sell services
- Measure the partner's ability to manage service requests, Return Material Authorization (RMA) volumes, and meet or exceed customer expectations
- · Rewards partner performance and recognizes partner investment

The partner will be measured on the following metrics:

- Conversion Rate
- Renewal Rate
- Post-Sales Support Customer Satisfaction
- Service Request Volume
- RMA Volume

What are the measurement periods?

Partner metrics performance and application of discounts will be aligned to a 12 month measurement time period of August 1st to July 31st. Results from this measurement period will be used to determine discounts for the next 12 month period. Discounts are updated on a yearly basis for all partners on October 1. Partners with at least six months metrics history (activating on the Cisco Shared Support program prior to February 1) will be held accountable for

Cisco Systems, Inc. All contents are © 2004 Cisco Systems, Inc. All Rights Reserved. Page 8 of 89 performance during the next eligibility and discount assessment. Partners with less than six months of metrics history (activating on Cisco Shared Support after February 1) will continue to be measured through the following year before the eligibility and discount assessment occurs at entry level discounts.

How are partners measured?

There are five metrics which measure partner against Cisco's expected performance and overall partner performance in the Cisco Shared Support program. These are grouped into three categories - Service Coverage, Service Quality, and Service Delivery.

Table 4. Metrics Measurements

	Service Coverage	Service Quality	Service Delivery				
Metric	Conversion RateRenewal Rate	Post-Sales Support Customer Satisfaction	Service Request VolumeRMA Volume				
Purpose	Determine partner ability to sell services as part of the original equipment sale and renew services on an ongoing basis. The primary goal of the service coverage metrics is to encourage service sales alongside product sales and promote a strong annuity based business.	Determine partner ability to meet/ exceed end-customer expectations. The primary goal of the quality metric is to ensure end-customer satisfaction with the service delivery.	Determine partner ability to manage service request and RMA volumes. The primary goal of the delivery metrics is to determine the value exchange related to work performed by the partner on behalf of Cisco.				

Service Quality Metrics

Post-Sales Support Customer Satisfaction Details

Measures customer satisfaction as reported by the partner's customers.

Service Quality is measured by one metric:

Customer Satisfaction: This metric focuses on the end user's satisfaction with partner branded post sales service. Cisco has determined that end user satisfaction is a key indicator of quality service delivery and strongly influences repeat product and services sales. This metric also serves as a point of balance to ensure the partner's Service Request and RMA volumes are not artificially reduced to meet performance thresholds, as customer satisfaction would likely be negatively impacted. This metric rewards partners who earn higher end user satisfaction ratings.

Cisco uses a third-party company, Walker, to perform customer satisfaction surveys. The results from this survey are used for a variety of purposes related to partner certification and the development of operational improvement plans.

Post-Sales Support Customer Support Calculation

Average customer score (scale of 1-5) minimum of 30 completed surveys) for the following question:

"Overall, how would you rate your satisfaction with post-sales support (repair, maintenance, and technical support) provided by the above Cisco Channel partner? Would you say you are...."

5-Very Satisfied

4-Satisfied

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- 3-Neutral
- 2-Dissatisfied
- 1-Very Dissatisfied

Survey process—Partners and Cisco field personnel are asked to identify customers who should be solicited for participation in the survey. The survey uses a rating system of 1-5, with 5 being the highest. The partner's customers are asked to complete the survey on behalf of the channel partner (the channel partner is identified on the survey). End-customer names are collected and entered by:

- · Cisco account Teams
- Partners by using PMC Tool, go to: <u>http://www.cisco.com/cgi-bin/frontx/PMC2/ctrl/partner_home.html</u>

Survey volume—Each Cisco Shared Support partner is required to submit enough customer names to ultimately achieve a minimum of 30 responses on Question 18 for each country grouping. Multiple (unique) respondents from a specific partner client are acceptable to meet the target of 30 responses. If a minimum number of 30 responses are received, points will be deducted from the partners score depending on the responses received.

Survey timing—Customer satisfaction surveys are distributed throughout the 12 month period. Each partner's targets and thresholds are based on the goals set at the beginning of the measurement period. Measurement periods for partners are based on Cisco Fiscal Year. The result will be calculated on a daily basis during the Cisco fiscal year.

Customer Satisfaction – 50/50 Rules

Partners must achieve a minimum of 30 responses on post-sales support (Q18) from their end users. Of these 30 responses, a minimum of 15 must be sourced from the partner (via PAL0 to emphasize partner participation. So that no one participant's results overshadows the other in respect to calculating the final customer satisfaction results at the time of a partner's yearly audit, Cisco will employ a 50/50 weighting factor such that response scores will be weighted equally as follows:

- If both Cisco sourced responses and partner-sourced responses are at a minimum 15, both sources will be weighted equally. For example, if Cisco sourced responses are 100 responses at 4.0 and partner-sourced has achieved 20 responses at 4.5, the final CSAT score will be weighted equally, irrespective of more responses being sourced by Cisco. In this example, the final customer satisfaction score would be 4.25 (not 4.08 if we overall weight-average).
- If the partner provides a minimum of 30 responses and Cisco sourced is less than 15, then the partner
 responses and scores will receive full, 100 percent weighting (in other words, no Cisco sourced scores will be
 applied in the calculation for recertification purposes).
- If the partner provides less than 15 responses and Cisco sourced is 30 or more, then Cisco sourced responses and scores will receive full, 100 percent weighting (same as above example but in reverse).
- If both Cisco sourced and partner-sourced are less than 15, a partner will be considered ineligible for this 50/50 Rules calculation and all responses will be weighted equally, and subject to the Cisco Shared Support adjustment penalty or ineligibility due to low response.

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Customer Satisfaction - Metric response allowance

The Cisco Shared Support Customer Satisfaction Metric Response Allowance is for partners who over-achieve on their PAL survey response rate on Q18. This process is implemented independently from the Certification Response Allowance, since Cisco Shared Support only focuses on Post-Sales Support Quality (Q18 in the PAL Survey) and on a Cisco fiscal year basis.

A partner can potentially be qualified for the Certification Response Allowance but not qualified for the Cisco Shared Support Customer Satisfaction Metric Response Allowance and vice versa.

Each Theater Quality Metric Response Allowance is aligned with the Channel's Response Allowance policy. In other words, if a theater has implemented the Channel's Certification Response Allowance, then the Cisco Shared Support Metric Response Allowance policy may be applicable within that theater.

Process

At the end of Cisco's fiscal year, if the partner has 36 responses or more on Q18 in the Annual Customer Satisfaction Survey (PAL), a corresponding number of low scores, determined by the Response Allowance Table, will be excluded in the Customer Satisfaction Metric calculation.

Each Response Allowance level is determined by response rate of the lower allowance level multiplied by 1.20. From there, Cisco will remove the lowest scores up to the amount specified in the Response Allowance Table. Note that no score on Q18 (field is empty) or an answer with "Don't Know" will not be used in determining response rate or the average Q18 score.

After the exclusions are determined, Cisco will recalculate the score based on the remaining survey Q18 responses and ultimately determine the partner's Cisco Shared Support discount level or eligibility.

Because this policy will require 36 responses or above, it should not overlap with the low response adjustment policy. Response allowance applies if the number of responses are >36. Low response adjustment applies if the number of responses is between 10 and 29. However, if the partner also qualifies for other customer satisfaction adjusts (such as 50/50); response allowance will be applied last. In other words, 50/50 is applied first, and the metric response allowance is applied. This ensures that the partner will receive the maximum benefit when both rules are applied.

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Response Rate on Q18	Response Allowance
Less than 30	
30 to 35	0
36 to 43	1
44 to 51	2
52 to 62	3
63 to 74	4
75 to 89	5
90 to 17	6
108 to 128	7
129 to 154	8
155 to 185	9
186 to 222	10
223 to 267	11
268 to 320	12
321 to 385	13
386 to 462	14
463 to 554	15
555 to 665	16
666 to 798	17
799 to 958	18
959 to 1150	19
lighest response rate from the last level x 1.20)	(Increment 1 allowance from the last level)

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Service Delivery Metrics

The delivery metrics measure the Cisco/partner value exchange and the partner's compliance in performing the Service Request (technical assistance) and RMA (troubleshooting/repair) functions required as part of the Cisco Shared Support program definition. These metrics relate to the volume of service interactions between the partner and Cisco and are not intended as a qualitative measure of the interactions.

Service Delivery is measured by two metrics:

- Service Request Volume²: As part of the Cisco Shared Support value exchange model, partners are required to provide TAC Level One and Two support to their end users. The Service Request Volume metric measures the partner's ability to minimize the overall number of Cisco Shared Support service requests escalated to Cisco relative to the dollar value of the partner's supported installed base (Shared Support installed base under contract between Cisco and the partner). With the exception of specific service request type exclusions Cisco does not differentiate call types it closes in support of the partner—whether the call is TAC Level One, Two or Three. This minimizes the level of subjectivity around definition split between the support levels. This metric rewards partners who escalate a smaller number of calls to Cisco, relative to their Shared Support installed base value
- **RMA Volume Ratio:** As part of the Cisco Shared Support value exchange model, partners are required to provide RMA support to their end-customers. The partner has a breadth of shipment location and service level options, but it is responsible for the fault isolation, diagnosis and RMA processing. RMA volume ratio focuses on the number of field replacement units (FRUs) from Cisco for the partner's Cisco Shared Support contracts relative to the dollar value of the partner's Shared Support supported installed base (installed base under contract between Cisco and the partner). With the exception of RMA category exclusions Cisco does not differentiate the RMAs shipped in support of the partner—whether the RMA is No Fault Found or a true failure, the RMA is counted. This is to minimize the subjectivity around definition split between the RMA categories. This metric rewards partners who request a smaller number of RMAs from Cisco, relative to their Shared Support installed base.

Service Coverage Metrics

Both Cisco and partner profitability have considerable dependencies on reaching forecasted sales and renewal volumes. While it is recognized that many Partners manage their services business independently from the product sale, significant focus must be placed on solution selling and attaching service alongside the product. We have also determined historically that customer loyalty is significantly higher with end-customers who buy service as part of their purchase than those that buy hardware/software alone.

Product coverage is measured by two metrics:

• **Conversion Rate:** The Growth Market full entitlement model presents some complexities in measuring the partner's ability to attach service alongside the hardware purchase. Because a partner must purchase one year of service for every serviceable product (if there is a SMARTnet equivalent offering for the chassis or card)—from a Cisco perspective, the attach rate (ability to sell service with the original equipment purchase) for service will be 100%. We recognize that this may or may not reflect the partner's *true* attach rate for services they sell-through to their end-customer.

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² Service Request Exclusions: The following service request categories are excluded from the service requests closed calculation: SVO, CCO, DOA, Open in Error, Duplicate, SMARTspares, Service Request Open Tool Self-Help (service requests opened that are closed after utilizing self-help web tools).

To address this disparity, the conversion metric has been developed to measure the partner's performance in renewing the full entitlement contracts purchased during the prior year. It may also be viewed s the combined measure of the partner's first year attach rate and second year renewal performance. The performance expectation for this metric represents the combined expectation of sales to end users in the first year and how much of that should be renewed the following year. This combined measure, however, looks only at measuring services sales between Cisco and the partner and does not measure sales between the partner and the partner's end-customer. This metric rewards partners who earn a higher ratio of service converted.

• **Renewal Rate:** On-going renewals or annuity business represents a key profit opportunity for our partners. The renewal rate metric tracks the partner's ability to renew service agreements. Renewals management requires specific investment and focus in customer data tracking (contact information, product ownership, service usage, contract expiration date, etc.) and investment on service renewal sales and marketing (telemarketing, direct mail, e-mail notification, etc.).

The renewal rate metric is measured ongoing from the 24th month onward for all service agreements. It compares the dollar value of chassis and card coverage available for renewal and the partner's performance in renewing that chassis and card coverage. This metric rewards partner who earns a higher ratio of service renewed to chassis coverage available for renewal.

Conversion Rate and Renewal Rate metrics are *independent* measures that track different time periods and contract types. At any given time, the conversion metric looks back only one year. The renewal metric looks at the aggregate renewal performance, irrespective of the age of the contract.

Metrics Phase-In

The following table illustrates the phase in of each of the five metrics.

	8/01/05 - 7/31/06	8/01/06 7/31/07	8/01/07 - 7/31/08	8/01/08 - 7/31/09
Metrics Measured during each Period (Measurement period is August 1 st to July 31 st)	Customer Sat Service Request RMA	Customer Sat Service Request RMA Conversion Rate	Customer Sat Service Request RMA Conversion Rate Renewal Rate	Customer Sat Service Request RMA Conversion Rate Renewal Rate
	8/01/05 - 9/30/06	10/01/06 - 9/30/07	10/01/07 - 9/30/08	10/01/08 - 9/30/09
Metrics Impacting Discount each Period (discounts in effect from October 1 st to September 30th)	Fixed Promotion Discount at Level 2	Level 2 discount for Conversion and Renewal Metrics Discounts for CSAT,RMA, and Service Request are based on performance *	Level 2 discount for Renewal Metric Discounts for CSAT,RMA, Service Request, and Conversion are based on performance *	Discount based on performance for all Metrics

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Performance Metrics Central

The PMC tool is a one-stop location for Cisco and partners to manage performance metrics for operational excellence and maximum profitability. The PMC collects partner performance raw data from various sources, conducts analysis and calculations, and presents to the users a set of metrics numbers, which would indicate the performance of the partner from different angles. The PMC enables partners to better assess their operations, identify areas for improvement and make use of Cisco's performance-based pricing. Cisco will provide visibility to a monthly snapshot via the PMC tool. The previous month's metrics performance will be published on the 15th of the following month. The PMC can be accessed at http://tools.cisco.com/CustAdv/PP/smIntroduction.do

The PMC User Guide is located at: <u>http://www.cisco.com/en/US/partners/metrics.shtml</u>. For more information or to answer additional questions, contact pmc support amer@cisco.com.

Partner Benefits

- Measure attach and renewal rates, and drive service sales performance against program thresholds/requirements
- Anticipate program eligibility changes (+/-) and discounts
- Identify whether partners can target cost reduction to Cisco to improve program performance
- Enables partners to understand their shipment and service coverage patterns (can identify top performers on sales teams)
- May also see the following benefits:
 - o Forecast renewal opportunities
 - See opportunities lost to other partners (i.e., when items disappear from renewal opportunity list)

How to Maximize PMC Benefits

- Log into PMC monthly
- · Download metrics to analyze and understand performance
- Anticipate and proactively address program eligibility changes (+/-) and discounts
- · Use this data to assist business planning and activities to meet business goals

Accessing Partner Metric Central

In order to be able to access the PMC tool, the user must have a Cisco.com (CCO) account.

Users must be granted access to the PAL tool. Access can be requested either on-line or by contacting your Cisco Channel Account Manager (CAM). If you do not know who your CAM is you can use the CAM Locator tool at http://tools.cisco.com/WWChannels/CAMLOC/jsp/cam_locator.jsp

Cisco Systems, Inc All contents are Copyright © 2004 Cisco Systems, Inc. All Rights Reserved. Important Notices and Privacy Statement. Page 15 of 89 Performance Metrics Central tool which currently covers all active SIS/Cisco Shared Support/Cisco Brand Resale partners. For additional help, send an email to the theater alias listed below:

For LATAM: pmc_support_amer@cisco.com

Login

Step1. Open your browser. The PMC tool supports both IE (version 5.5 and above) and Netscape (version 6.0 and above).

Step2. Type the following URL to the address field of your browser: <u>http://tools.cisco.com/CustAdv/PP/smIntroduction.do</u>

Step3. A dialog box will automatically pop up, which looks like the following:

Enter Netv	vork Passwor	d ?	×
? >	Please type yo	our user name and password.	
8	Site	taols.cisco.com	
	Realm	DCO	
	<u>U</u> ser Name		
	Password		
	🗆 Save this p	assword in your password list	
		DK Cancel	

Step4. Type in your CCO id and password, and click 'OK'.

Step5. It depends on the type of user of your CCO id as what screen you will see. Please see the sections below.

Once logged in, the partner user will be able to view performance metrics by clicking on 'PERFORMANCE METRICS' top menu or tab.

The following screen will be displayed after authentication:

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Cisco Systems	400000000000000000000000000000000000000	Home Logged in Profile Conta	rts & Feedback Help Ste Map
	Area Navigation Select an Area	I BO	Sahata Lasaéan / Langunga
			Search:
ELCOME TO CISCO YSTEMS	+ IVELCOME TO CISCO SYSTEMS		00
ather Access onLine (PAL). Second Metrice	Partner Access onLine (PAL) - Support M	Aetrics	Search Al Cisco.com 💌
Select metrics	INTRODUCTION	PERFORMANCE METRICS	Toolkit: Rai overteare below
		Your Partner Nama (Country) Your Name	(= = + •
	This module of Support Metrics/Partner Access onlin Metrics for worldwide Shared Support partners. Following are the key features.	e (PAL) presents 2003 Shared Support Program	Related Tools Support Metrics Partner E-Learning Connection Related Links
	 View applicable performance metrics Download detailed reports of underlying data View applicable Thresholds and discounts metrics 	for each metric. Natrix	Products & Services Shared Support Introduction Partners & Resellers
	The pilot phase will only have data for few select UAT PERFORMANCE METRICS tab.	F partnero. To view the metrics please elicis the	Carrier Casco Programs
	Please click Support Metrics link under the Related T operational information	Fools section to access other matrics or support	
	PUSINESS INPUSTRIES & SOLUTIONS NETWORKING SOL CREENING ISCHNICAL SUPPORT LEARNING & EVENTS	UTIONS & PROVISIONED SERVICES PRODUCTS & SEI PARTNERS & RESELLERS OPOUT CISCO	RVICES TECHNOLOgies
	Home Logged in Profile Contacts & Feedback Help Site	Map	



By selecting the Performance Metrics tab, the following screen appears:



Section Header

All the Cisco Shared Support metrics are displayed in a section with the header 'Shared Support'. In the section header, it also displays the publishing date of the metrics numbers. The metrics numbers for the month are normally published on the 15th of next month. Based on the publishing date, you can determine for what month the current metrics numbers are calculated. For example, if the publishing date is Dec 15, 2003, it means the metrics numbers are calculated based on the data till Nov. 2003.

Metrics List

All the Cisco Shared Support performance metrics are listed in the first column. Partners in LATAM would see the following list:

Conversion Rate Renewal Rate Post-Sale Customer Sat Case Volume RMA Volume

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Metrics Number Displays

The second column of the metrics table is for the metrics numbers.

Each metrics may have multiple numbers, as named in the metrics name column. For each metrics, there is one key number among all the metrics numbers. This key number will determine which level the partner belongs to, which is illustrated using the color code. At the bottom of the section, you can find the legends for those color codes.

Download Shared Support Metrics Detail Report

Each metrics number is calculated based on a set of data extracted from the various data source. If you want to see the detailed item by item data of which the metrics numbers consist, you can download them from the Performance Metrics Central tool.

Download detail reports

Step1. Go to the Performance Metrics Screen

By clicking on the Performance Metrics tab, you would see the following screen:



Step2. Click the link Download Report as marked in the above screen shot.

A window will pop up, shown as follows:

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CISCO SYSTEMS	Close Window	
Performance Metric	s Central	
Download Detail Rej	port(s)	
Mark the checkboxes agai	inst reports required a	and submit request. Reports would be emailed as soon as the processing is completed
□ Conversion Rate %	o (Year-To-Date) /ear-To-Date)	
Post-Sales Custon	ner Sat (Year-To-Date)
Case Volume (Sele RMA Volume (Sele Submit	ect Month Select one ect Month AUG 2004 SEP 2004 OCT 2004 NOV 2004 DEC 2004	
Close Window		

Step3. Select the corresponding report or reports and click the 'Submit' button. The following screen will display:

🧳 Pe	erform	iance M	letrics C	entra	al - Ci	sco Sy	stems - Mi	cro	soft Inter	net Ex	plore	provid	ed by	Cisc	o Syste	[.	- 101)
Ele	Edit	⊻jew	Favoril	es 🔅	Tools	Heb				Der	rforman	ce Metric	s Ceni	hral -	Cisco Sva	tens	- Micro
¢ − B	ack 👻	⇒ ~	8 🖗	ã	0	5earch	Favor I	es	Media	3	12-	3 2			C13C0 391	ACC 112	
	Cisc	o Systi	EM S	Clo	se VVI	ndow											
Pe	rfor	nance	Metri	cs C	entr	al											
D Ti y	ownio he dow cu upo	ad Deta vriload ra n comple	il Repor equest ha ston	t Resi is bee	ult n subr	nitted. 1	he report(s)	wi	I be emailed	to							
c	lose W	indow															

Step4. The PMC tool will generate the report and email to you. Depending on the system load, normally it would take less than four hours to receive the requested reports via email.

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Normally, it takes 15 minutes or less to get the email of the requested report. However, due to the network conditions, server load, or size of the download, it might take as long as a few hours to get the email. If you do not receive the report after 24 hours, you need to request download again, or contact the PMC support team.

View the downloaded report

The requested reports are packed into a zip file before emailed to you. You need to uncompress the file first. When unpack the zip file, suggest you uncheck the option 'Use folder names'. This way, all the reports will be extracted directly into the location you've specified.



This would happen to partners who have many contracts or large volume of items or cases, etc. In this situation, you can use other generic editor tool to open the CSV file first, since the CSV file is also a plain text file. You can then break the file into multiple sections, each of which is less than 64 lines.

View Shared Support Program Threshold and Discount

On the metrics display screen, in the Shared Support section, there is a link "View Threshold and Discount" as described below:



Click on the link, a new window will pop up, showing the threshold and discount information for the current partner as below:

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Pricing

In the SIS98 program, the partner paid a support fee based on a standard percent of product net in exchange for delivering specific call-center and repair functions. This required the partner to incur substantial cost for spares, logistics, and other capital expenses. Cisco Shared Support pricing offers the partner the ability to use Cisco infrastructure. This includes parts delivery to the partner's selected location, resulting in reduced cost of capital SIS fee, spares, and logistics.

Note: This pricing information refers to the standard Cisco Shared Support program. Pricing for Cisco Shared Support partners is based on the following:

- Partner's discount is taken from LATAM Shared Support Price List
- Reflects a consistent discount across all partners

Cisco Shared Support
Annuity-based contracts
First year of product life:
Full entitlement—purchase service on all product at time of order
Second year of product life and onward:
Selective renewal
Pricing is based on discount off Latam Shared Support Price File
Discount is driven by partner's performance metrics
Conversion Rate
Renewal Rate
Service Request Volume
RMA Volume
Post-Sales Support Customer Satisfaction
Multiple hardware service options: Same-day shipment (SDS)/Next business day (NBD), 8x5x4, 24x7x4
Entitlement enforcement



Responsibilities and Process Flow

General Responsibility Diagram

General Responsibility and Information Flow for Cisco Shared Support



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System Changes and Business Process Flows

Pre- and Post-Sales Operational Changes

Pre-Sales	Post-Sales
Electronic ordering	Service request management
Point of sale (POS) data reporting required	Serial number capture and site-level customer date required
Asset management	Quoting and ordering (product and service) process changes
Significant changes to quoting and ordering process	Gradual entitlement enforcement on product orders
Quoting requires use of quote tool to ensure accuracy	Cisco Shared Support program service levels
Ordering requires attaching service to original product	Cisco Shared Support program part numbers
shipment case management	Cisco Shared Support partner discount

Process Flow Categories

Process Flow Categories



The following section will cover these topics:

- New Product/Services—Quoting, ordering, contract creation and invoicing
- Service Only—Quoting, ordering, contract creation, invoicing, renewals
- Delivery-Cisco IOS downloads, TAC support, RMAs, replacement product
- Others-Moves, adds, changes; service upgrades and downgrades

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Ordering

Quoting and Ordering Data Requirements

Under Cisco Shared Support, all service orders and renewals must be submitted electronically by the partner and certain information must be supplied. An inability to supply some or all of the required data will delay order processing and may potentially prevent a service order from being booked. A partner's ability to maintain appropriate details regarding their end customer's equipment installation sites, and tracking installed equipment information will support the ordering process and automation of contract information and data maintenance may facilitate the coordination of a partner's data management with the requirements for order creation.

It should be noted that the input of incomplete or incorrect data during ordering can impact both partner's operating expenses and the delivery of services to customers. Partners who use their own address in the "ship to" install or service site field rather than the end customer's address (perhaps in order to stage or inventory the equipment for the customer or because the end customer is not yet finalized or under contract) would have to maintain their own logistics infrastructure and expenses instead of benefiting from the economies of scale available by leveraging the inventory and logistics operations available under Cisco Shared Support. Additionally, they will be unable to effectively manage their contract data at the time of renewal, potentially impacting their ability to drive their conversion and renewal rates as outlined in the next section.

Business Process Flow for New Product and Service Quote (Use Ordering Tool – IPC)



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Process Flow to Submit Order



New Products and Services

Those partners that order product directly from Cisco will place the order via the Ordering Tool.

The Ordering Tool

The Ordering Tool is a web-based application designed to allow partners to enter their product and service orders directly from the web. The Tool is for use by all 1-Tier partners who do not use XML but need to order product and service at the same time.

The *Ordering Tool User Guide* describes the basic process of creating an order using the IPC Ordering Tool. Topics are presented in a sequential order so you can reference the information you need when using the tool. Advanced features, timesaving techniques, and ways to customize your orders are also described in detail. These topics include: setting defaults, using ship sets, getting saved configurations, line-item details, and item searching.

Benefits of Using the Ordering Tool

- A central home page from which you can create orders, access saved orders, and use features that save time in creating orders.
- The ability to assign different shipping destinations and contact people to items on the same order.
- Timesaving features such as default order information, order templates, and saved configurations.

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Using the Ordering Tool

The home page provides convenient access to the following ordering functions:

- Create an order—create a new product and service order.
- Open or delete saved orders-View and manage existing orders.
- Get routed order—View orders routed to you for approval.
- Use order templates—Build an order from a template or modify a template.
- Set defaults—Set defaults or standard settings for all orders you create.

Learning Tools Available for ordering tool:

Ordering Tool User Guide at:

http://www.cisco.com/E-Learning/bulk/guest/customer_service/ot_help/index.htm

There is a training video on demand available at:

http://www.cisco.com/en/US/partner/products/svcs/ps3844/ps3849/ps3850/service presentations list.html

This web-based system provides a consolidated view of Ordering Tool training and support information including step-by-step instructions, online demonstrations, a glossary and much more.

Note: If a partner orders across several countries, they should use the order bill-to and discount associated with the country the device will be installed in.

Responsibilities for New Product/Services for the Ordering Tool

Task	Cisco	Partner
Set up partner's portfolio to reflect appropriate levels of Cisco Shared Support access and full entitlement enforcement	х	
Choose appropriate service level at the point of product sale		х
Attach service at the point of product sale		х
Provide end user name, install site location, ship to, and contact information		х
Establish service level default at the partner level within the partner's Ordering Tool portfolio	х	х
Change processes to incorporate one service invoice for every product shipment		х
Use advanced contract management to establish service level defaults for the partner's end users (optional)	х	x

Required data to complete an order includes:

- Order type
- Product and service discounts
- Service level
- End user company name
- Partner service billing address
- Install site and contract data

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Formatted: Bullets and Numbering

Cisco Shared Support Combined Hardware and Software Services Ordering Process

Partner logs onto the Ordering Tool at http://www.cisco.com/en/US/partner/ordering/index.shtml by selecting Ordering Tool.



Please include the following information in their respective fields on the Create an Order Page:

- Order Type •
- Price List •
- Product Discount Percentage
- Service Discount Percentage

- Purchase Type (should be set to Resale for ordering CSSP services)
- Purchase Order Number .
- Requested Ship Date ٠

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Service Level

End User

Figure 1.

Create an Order

🚰 Cisco Systems: Online Ordering Tool - Microsoft I	nternet Explorer provided	by Cisco Systems, Inc.	_ 8 ×
Eile Edit View Favorites Iools Help			
🗧 Back 🔹 🤿 🔹 😰 🚮 🛛 🐼 Search 💿 Favor	ites 🛞 Media 🎯 🖏 •		
Address 🕘 https://ecommerce.cisco.com/cgi-bin/front.x/s	ervlet/IPCLoginServlet.OT?se	ssion=109967657813806152343756304	▼ 🖉 Go Links '
Y! - 2- Search Web	👻 🚍 🖌 🖂 Mail 👻 🚳 I	My Yahoo! 💽 Games 👻 🍄 Personals 👻 🚯 LAUNCH 👻 Sign In 💌	
Create an Order			
Instructions:	1. Fill out Basic Order inforr	nation 2. Fill out End User information 3. Click Continue to go to the Order Form	
Basic Order Info	Order Type	Standard Order Help me choose	
	Price List	Global Price List US Availability	
	Order Description	×	
	Product Discount	20.0 % Service Discount 70.0 %	
	Purchase Type	Resale Help me choose	
	Purchase Order #		
	Requested Ship Date	(MM/DD/YYYY)	
	Quote Number QN		
	Hardware Service Level	Shared Support Same Day Ship	
	Software Service Level	Shared Support SAS	
Referral Info (Required for the US/Canadian Shared Support Referral orders	Select End User	Select One	
onlyl <u>earn more</u>)		If not listed, add new End User	
	Country	Spain	
	End User Market	Select One	
e 1			Internet

In the example depicted above, the selected Service Level is Shared Support Same Day Ship, which is a hardware service offering. By selecting this service option on the Create an Order page, all hardware line items ordered on the Main Order Form will be populated with this service level. You will need to select a software level of SAS or SASU even though you may not be ordering software. SAS or SASU service lines will only be attached if you ordering software.

- 1. Click **Continue** to access the Main Order Form.
- 2. Enter selected hardware product or products.
- 3. Click Enter
- 4. Click Save Order
- 5. The Main Order Form will look as shown.

Main Order Form Example

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Country

🚈 Cisco Ordering 1	fool: Main Order Form - Microsoft Internet Explorer provided by Cisco Systems, Inc.		_ 8 ×
<u>File E</u> dit <u>V</u> iew	Favorites Iools Help		-
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Address 🙆 https://	ecommerce.cisco.com/cgi-bin/front.x/servlet/IPCOrderServlet.OT?DisplayOrderChecklist=18session=1099676578138061523437563048id=MP5695655	• @	Go Links »
Y! - @-	Search Web 👻 📑 🖌 🖂 Mail 👻 🥥 My Yahoo! 🌔 Games 🔹 💖 Personals 🔹 🏠 LAUNCH 🔹 Sign In 💌		
	CISCO SYSTEMS CISCO Ordering Tool Cisco Home NPM		_
	Jahn Jahn Main Order Form		
	Ordering Tool Home Address Book HELP		
	Main Order Form Header Details ShipSets All Order Details		
	Shipping: REGRESSION DO NOT SHIP CS Billing: REGRESSION DO NOT SHIP CS P.O. Number:		
	FRANCE BILLING ADDRESS SPAIN BILLING ADDRESS Order ID: MP5695655 PARIS 75008 France MADRID 28020 Spain		
	requested ship Date.		
	Hardware Shared Support Same Day Ship		
	C Apply to all service lines		
	Enter, configure, and revise line item		
	Line # Enter Product Qty. Discount Unit Price Clear Contigure Get Saved Contrg		
	New Market		•
	Line Product Org List Price Discount Onter Price Status Delete 1 PIX-501 1 595.00 20.0% 476.00 476.00 Unverified Image: Compare the status Image: Compare the status <td></td> <td></td>		
	SET 1 PIX 501 Chassis (Chassis, Software, 1 FE+4 Complete FE Port Switch)		
	2 New Line		
	Save Order Save as Template Route Order Subtotal: 478.00 Check for Errors Submit Order		<u></u>
25	(Includes Minor Lines)		<u>-</u>
		nternet	
Start M.	▲▲ 2011 - 201	905	12:47 PM

Once a product is placed on order
 Select the Unverified link to configure the product.

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- Configure the product accordingly (see figure 13).
 Select Check Configuration

Cisco Configuration	n Tool - Configure - Microsoft Internet Explorer provideo	l by Cisco S	Systems, Inc.		_ 8 ×
<u>Eile E</u> dit ⊻jew Fa	avorites Iools Help				
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Address 2 https://www	w.cisco.com/cgi-bin/front.x/apollo/servlet/ICITServlet?Applicatio	nName=IPC	&ServiceName=IPCConfigurator&EventNam	e=LoadSelectOptionsScreenEvent&OrderIc 🗾 🔗	Go Links »
Y! . C.	Search Web 👻 🕞 🛛 NEW Toolbar Upda	te - 🖂	Mail 👻 🚳 My Yahoo! 💽 Games 👻 🖇	🆓 Personals 🔹 🕼 LAUNCH 👻 Sign In 💌	
	Cisco Systems Cisco Configuration Tool		Cisco Home NPM	Legin Prefile You are logged in as: QASSROW	
	Exit Configuration			HELP	
	Configuration Details Select Options		Enter Options 🔰 Classic Menu	Option	
	PIX-501 PIX 501 Chassis (Chassis, Software, 1 FE+4 FE P	ort Switch	n)	View My Selections	
	I o add options, select item category on the left, ther displayed on the right.	n select op	tions from the list	Configuration Guidance OFF	
	Use the Cisco IOS Software Selector for software sel	ection ass	istance.	Enable Error Correction	
	STEP 1: Select Item Category	STEP 2: (Choose Options and Select Desired (Juantity Below	
	Software License for PIX-501	0	None Selected	-	
	Encryption License for PIX-501 POWER CABLES	©(1)	CAB-AC Power Cord,110V	USD 0.00	
		°(1)	CAB-ACE Power Cord Europe	USD 0.00	
		°(1)	CAB-ACI Power Cord-Italian	USD 0.00	
		°(1)	CAB-ACU Power Cord UK	USD 0.00	
		°(1)	CAB-ACA Plug,Power Cord,Australian,10A	USD 0.00	
		O(1)	CAB-ACS Power Cord for Switzerland	USD 0.00	
	Delete All Exit Configuration		Sa	ve Check Configuration	
_					
javascript:;				📔 🔤 💕 Internet	

When the product is configured correctly, the following screen will appear.

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Figure 2. Completed Configuration

Cisco Configuration Tool - Completed Configuration - Microsoft Internet Explorer provided by Cisc	o Systems, Inc.				_ 5	<u>''</u> ×
Eile Edit View Favorites Iools Help						
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Y - 🖉 - Search Web 🕞 🚍 - 🖂 Mail 👻 🥸 My Yahoo! 🎼 Games 👻	💱 Personals 👻 🦇	LAUNCH 👻 Sign I	in 💌			
Cisco Systems Cisco Configuration Tool	Cisco Home NPN	Login	Profile	1		
Completed Configuration		You are logge	d in as: QASSR	ow		
Exit Configuration			HEI	D		
<u>Exit Configuration</u>						
You have successfully completed your configu	ration!					
Product Number and Description	Ofter	Price	l ead Time			
PIX-501			45 Dava			
PIX 501 Chassis (Chassis, Software, 1 FE+4 FE Port Switch)		050 595.00	15 Days			
PIX v6.1 Software for the PIX 501 Chassis	1	USD 0.00				
PIX-501-SW-10	1	USD 0.00				
PIX-501-VPN-3DES	1	LISD 0.00				
PIX 501 3DES/AES VPN/SSH/SSL encryption license CAB-AC						
Power Cord,110V	1	USD 0.00				
				-		
Estimated Lead	<mark>ime:</mark> 18 - 21 Day	Estimated	Price:USD 595	.00		
Email Continuation Print Download Edit Continuation Exit Continuation	tion	Save	Add to Orde	er		
and congention that contact and an angention						

Click Add to Order to return to the Main Order Form.

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Shared Support Service Level

🚰 Cisco Ordering Tool: Main Order Form - Microsoft Internet Explorer provided by Cisco Sy	/stems, Inc.	8×
<u>E</u> ile <u>E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> ools <u>H</u> elp		
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Address 💩 https://ecommerce.cisco.com/cgi-bin/front.x/servlet/IPCOrderServlet.OT?DisplayMainOrder	rForm=18session=109967657813806152343756304&id=MP5695655 🔽 🎓 Go 🛛	Links »
Y - 🖉 - Search Web 🕞 🚍 - 🖂 Mail 🕞 🥥 My Yahoo! 🗓] Games 👻 🌮 Personals 👻 🦚 LAUNCH 👻 Sign In 💌	
Cisco Systems Cisco Ordering Tool	Cisco Home NPM	-
Ordering Tool Home	Address Book HELP	
Mein Order Form Header Details ShipSets All Order Details Shipping: REGRESSION DO NOT SHIP CS Billing: REGRESSION DO FRANCE BILLING ADDRESS Billing: REGRESSION DO PARIS 75008 France	IS ON OT SHIP CS <u>P.O. Number;</u> DRESS Order ID: MP5685655 ain <u>Requested Ship Date;</u> C Apply to page sendre lines only	
Hardware Service Level Shared Support Same Day Ship	C Apply to all service lines	
Enter, configure, and revise line item	Clear Configure Get Saved Config Enter Item Search Service/Line Details	•
Line Float Critical Crital Critical Crit	20.0% 476.00 476.00 <u>Verifies</u>	
2 CON-CSSPD-PIX501 1 143.00 SET 1 Shared Supp. Same Day Ship, PIX-501	70.0% 42.90 42.90 Not Configurable Site Info. Incomplete	
3	New Line	
Save Order Save as Template Route Order	Linetotal: 0.00 Check for Errors Submit Order	

• Select the <u>Site Info. Incomplete</u> link and enter the relevant service site information. This includes install site and contact data as well as partner service billing address and contact data. These are used to set up the service contract based upon the Service Agreement Framework defined for the program (one contract per service level/end user).

- Click Save button to return to the Main Order Form.
- If you are ordering software products, enter selected software product(s).
- Enter selected software product or products.
- Click Enter
- Click Save Order.

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The *Main Order Form* will look as follows:

Main Order Form

DOCK -	3 3 🚮 Q Search 🗃 Favorites @ Media	3 B- 3 = B 🔒 🛝		
ress 🙋 https:	//ecommerce.cisco.com/cgi-bin/front.x/servlet/IPCOrderS	Servlet.OT?DisplayMainOrderForm=18session=1	10132203267681884765625409&DisplayMainOrderForm=1&id=	Go Links
1 - 0-	Search Web + - NEW T	roolbar Update 👻 🖂 Mail 👻 🌚 My Yaho	o! 💽 Games 👻 💖 Personals 👻 🚯 LAUNCH 👻 Sign In	-
	CISCO SYSTEMS Cisco Ordering Tool	Cisco Home	NPM	
	Main Order For	rm		
	Ordering Tool Home		Address Book HELP	
	Main Order Form Header Details Ship	Sets All Order Details		
	Shipping: REGRESSION DO NOT SHIP CS	Billing: REGRESSION DO NOT SHIP CS	P.O. Number;	
	FRANCE BILLING ADDRESS PARIS 75008 France	SPAIN BILLING ADDRESS MADRID 28020 Spain	Order ID: MP5778047	
			Requested Ship Date:	
	Hardware Shared Support Same	e Day Ship	 Apply to new service lines only 	
	Service Level 1	· ·	C Apply to all service lines	
	🗉 Enter, configure, and revise li	ine item		
	Enter Product Gty.	Discount Unit Price Clear	Configure Get Saved Config	
	I New _ 1	49 Enter	Item Search Service/Line Details	
	Line Product	Qty List Price Discount Unit I	Price Extended Price Status Delete	
	ET 1 PIX-SUT SET 1 PIX 501 Chassis (Chassis, Software, 1 FE+4 FE Port Switch)	1 595.00 49.0% 3	U3.45 3U3.45 <u>Venned</u> Complete	
	2 CON-CSSPD-PIX501 SET 1 Shared Supp.Same Day Ship, PDK-501	1 164.00 70.0%	49.20 49.20 Not Configurable Complete	
	3		New Line	
	-			

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Line Number

ress 2 https://ecommerc	jsco.com/cgi-bin/front.x/servlet/IPCOrderServlet.OT?DisplayMainOrderForm=18session=1101327805564086914062598628DisplayMainOrderForm=18ade 💆 🔗 🕼 Visional and 🖉 🖉 December 2010 Dece
Cisco S utilitius Ordenin	Test Cisco Andering Tool Cisco Nome NPM Color Co
Main C Shippi	er Form Header Details SnipSets All Order Details REGRESSION DO NOT SHIP CS PRANCE BILLING ADDRESS SPAIN BILLING ADDRESS Order D: MP5778601 PARIS 75008 France MADRD 28020 Spain Requested Ship Date: C Analytic page service lines only
	terdware Shared Support Same Day Ship C Apply to all service lines ter, configure, and revise line item F Enter Product Gty. # Enter Item Search ServiceLine Details
Line 1 SET 1 1	I Oty List Price Discount Unit Price Extended Price Status Delete 1 595.00 49.0% 303.45 303.45 Verified Image: Chassis (Chassis, Software, 1 FE+4 Image: Chassis (Chassis (Chass
2 1 SET 2 3	SPD-PIX501 1 164.00 70.0% 49.20 49.20 Not Configurable Supp. Same Day Ship, PIX-501 Contexts N New Line Contexts

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After the appropriate product is selected, click **Service Line Details** shown in the figure below.

Service Line Details

Elle Edit View Favorites Tools Help + Back + + + + + + + + + + + + + + + + + + +	ē ×
Image: Back · · · · · · · · · · · · · · · · · · ·	
Address in https://ecommerce.disco.com/cg/bin/front.x/servlet/IPCOrderServlet.017DisplayMainOrderForm=18assion=1101322032676818947565254098DisplayMainOrderForm=18ads.ic> in a in	
Y C Search Web Image: New Toobsr Update Year Toobsr Update <thyear th="" toobsr="" update<=""> <thyear th="" toobsr="" u<=""><th>nks »</th></thyear></thyear>	nks »
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Ordering Tool Home Address Bool: HELP Main Order Form Header Details ShipSets All Order Details PL Shipsing: REGRESSION DO NOT SHIP CS PARKE SEGRESSION DO NOT SHIP CS PL PL PARKE SEGRESSION DO NOT SHIP CS SPAIN BILLING ADDRESS PL Order D: MP5778047 PARKE STOOD France SPAIN BILLING ADDRESS MADRD 28020 Spain Order D: MP5778047 Requested Ship Date: C Apply to new service lines only C Service Level Shared Support Same Day Ship C Apply to all service lines Select Line Details PLine # Enter, configure, and revise line item C Configure Oct Saved Config Line # Enter Product Oty Discourt Unit Price Clear Configure Line Product Oty List Price Discourt Unit Price Extended Price Address to this ne, including service, shipping, end D1 PR<601	4
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3 New Line	
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Subtoral 400.15 [Includes Minor Lines]	*

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The following Line Items Detail page will appear:

🛃 Cisco Ordering	g Tool: Set Line Item Details - Microsoft Internet Explorer provided by Cisco Systems, Inc.	_ 8
Eile Edit View	V Favorites Icols Help	
↓⇒ Back • ⇒ →	🖓 🖉 🚮 😡 Search 🔄 Favorites 🞯 Media 🧭 💁 🥥 🖃 🗐 🚱	
Address 2 hitps	s://ecommerce.cisco.com/cgi-bin/front.x/servet//PCOrderServlet.OT?line_tem_id=61958147&action=LIDetalsFrameset&session=110132203267	6818847656254098id=1 @ @ Go Unks
X! . @.	Search Web 🕞 📑 🖛 MEW Toolbar Update 👻 🖂 Mail 🗸 🥨 My Yahoo! 💽 Games 🤟 Personals 🛪	S LAUNCH · Sign In ·
	Ordening Tool Home	HELP
	Line Item Details Configuration Details	
	Modify details of a line item	Line
	You can select another line to edit via the Line ≢ pull-down below, and you can modify your configuration via the configuration status link. When you are finished, click the Save button to save changes you make to any section of this page.	
	Note: Changes made here are line-specific.	
	You are working on this line:	e Status
		Vention
	PIX 501 Chassis (Chassis, Software, 1 FE+4 FE Fort Switch) 1 595.00 49.0 303.45	Complete
	Sections: <u>Service Options</u> <u>Referral Info</u> <u>Add/Edit Notes to this Line</u>	
	Service Options	TOP
	Note: After modifying the options below, dick Save to save your changes.	
	Service Level Shared Support Same Day Ship	
	Length 1 year	
	Service Discount Length of Service	
	Last saved: 2 years	
	Save Order November 24, 3 years	Back to Order Form
Done		🔒 🍘 Internet

Select the desired contract duration.

- Click Save Order.
- Click **Back to Order Form** to return to the Main Order Form.





The Main Order Form will look as shown below.

Main Order Form

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ress e https:/	ecommerce.cisco.com/cgi-bin/front.x/serviet/IPCOrders	ervlet.OT?DisplayMainOrd	erForm=18session=1101322	032676818847656254098	DisplayMainOrderForm=	=18id= • 67 60	LINK
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	Hardware Shared Support Same	Dev Ship		Apply to new set	ervice lines only		
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	E New 1	49	Enter	Item Search Ser	vice/Line Details		
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	■ 1 PIX-501 SET 1 PIX 501 Chassis (Chassis, Software, 1 FE+4 FE Port Switch)	1 595.00	49.0% 303.45	303.45	Verified Complete		
	2 CON-CSSPD-PIX501 SET 1 Shared Supp.Same Day Ship, PIX-501	3 164.00	72.8% 44.63	133.89 Not	Configurable		
	3				New Line		

Click Save Order Click Submit Order

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Cisco Shared Support SKU Numbers

New SKU Numbers

Service Levels*	SKU Description Prefix	GSP Description	
CSSPD	CON-CSSP SDS	Shared Support Same Day Ship	
CSSPE*	CON-CSSP 8x5x4	Shared Support 8x5x4	
CSSPP*	CON-CSSP 24x7x4	Shared Support 24x7x4	
CSSPS	CON-CSSP SAS	Shared Support SAS	
CSSPU	CON-CSSP SAU	Shared Support SAU	
*where available			

Module & Card Support

Under SIS98, modules/cards/boards were assigned a service category (i.e., A, B, C, D or S) determined by the complexity of the product family. Based on the service category, a SIS98 fee was charged, and items were routinely added to the SIS98 contract to drive spares holding and service entitlement to the partner.

Under Cisco Shared Support, modules/cards/boards may or may not be mapped to the Shared Support price list and therefore may have a \$0 service value. If the modules/cards/boards have a \$0 value, they would be covered for support under the following two scenarios. If neither of these scenarios applies and there is a \$0 service value, the modules/cards/boards are not automatically covered for support.

- 1. If the module was purchased as part of the standard configuration of a chassis, that module would be automatically mapped to the contract associated with the chassis.
- 2. If the module was purchased outside of the standard configuration of a chassis (i.e., purchased separately for added functionality or as a spare for a given chassis), no service fee will be charged, but the module may be supported if:
 - i. Associated with a specific chassis already covered by an active contract. The partner will have to advise Cisco through Service Contract Center (SCC) contract update, which covered chassis the module needs to be associated with.
 - ii. Where the chassis is covered by the legacy SIS98 contract, the process to update configurations is the same.
 - 1. Associated to a spares only contract where the specific chassis cannot be identified maximum service level CSSPD. The partner will initially need to request Cisco to create this spares contract via use of the email aliases below, the partner's request should be as follows:
 - 2. Email Subject: Request for CSSPD Spares Contract

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- 3. If less than five devices, within the email, provide product code, serial number and partner's spares address.
- 4. If greater than five devices, provide this same information in a spreadsheet attachment; product code, serial number and partner's spares address.
- 5. Following this initial contract setup ongoing updates to the spares contract with additional modules will need to be managed via SCC.

Other ordering scenarios and associated operating practices:

SIS Spares ONLY, not installed into a chassis	SIS Spares insertion into a chassis covered by SIS98	CSSP Contract Spares and Chassis Adds	SNT Contract Spares and Chassis Adds
Partner B and Chargeable Service: Order product sparses on IPC, add the appropriate CSSPD part Indicating the GBM/ E/U Contract number; SDS/NBD only. Partner IB and US Service: Order product sparse on IPC, send email to "sparse allas" with order Information and the GBM/ E/U Contract number; SDS/NBD only.	Partner B and Chargeable Service and Partner ID and 0\$ Service: Order product spares on IPC with NO Service Line, send email to "spares allas" with order Information, SIS chassis serial number and SIS98 service contract number. CSSPD is the only service level allowed - SDS/NBD only.	Partner IB and Chargeable Service: Order product sparse on IPC, add the appropriate CSSP part Indicating the GBM/ E/U Contract number. Partner IB and 08 Service: Order product sparse on IPC. Use SCC to add the product spare to the appropriate GBM/ E/U Contract number.	Partner IB and Chargeable Service: Order product spares on IPC, add the appropriate CSSP part Indicating the GBM/ E/U Contract number. Partner IB and US Service: Order product spares on IPC. Use SCC to add the product spare to the appropriate GBM/ E/U Contract number.
Competitor IB and Chargeable Service: Order product spares on IPC, add the appropriate CSSPD part indicating the GBM/ E/U Contract number; SDS/NBD only. Competitor IB and 0\$ Service: Order product spares on IPC, send email to "spares allas" with order information and the GBM/ E/U Contract number; SDS/NBD only.	Competitor IB adds to chassis' are PROHIBITED unless the entire chassis and all associated cards are acquired from incumbent partner. Manual process if acquired.	Competitor IB Sparing is not recommended. Competitor IB <u>adds to</u> chassis' are <u>PROHIBITED</u> unless the entire chassis and all associated cards are acquired from incumbent partner.	Competitor IB Sparing is not recommended. Competitor IB adds to chassis' are PROHIBITED unless the entire chassis and all associated cards are acquired from incumbent partner.

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Multi-Line Configurator Tool

The Multi-Line Configurator (MLC) tool is an ideal tool for pre-sales engineers or other groups who need to create quotes quickly.

The Multi-Line Configurator Tool allows you to do the following:

- You can create and save more than one configuration in a configuration set.
- You are able to add spares and service products to a configuration set.
- You may route configuration sets to other people to process.
- You can export configuration sets as either Excel files or XML files.
- You are able to apply service to all lines in the configuration set.

The above functionalities are presented in a familiar environment to users of the Ordering Tool. Please note the MLC does not allow for the submission of orders.

Please refer to the Multiline Configurator user guide for instructions on using this tool. Request this from your Cisco Representative if you require a copy.

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Ordering (New Service and Renewals)

New Product via 2-Tier Point of Sale Purchases

Those partners that order product through a distributor will place a service only order via SCC. The distributor is required to provide Cisco with Point of Sale data including the product details, serial numbers and who the product was sold to. This information will then be used by the partner and Cisco to create service contracts.

Each month the partner will be provided the following documentation each month:

- Notification letter/email from Cisco summarizing the information relating to service fees currently due
- POS Billing Report showing details of product purchases on which service fees are due Excel spreadsheet
 showing details of product purchases and corresponding information on which service fees are due that
 partners review for accuracy. The partner is also required to validate and update end user details.
- Once the partner validates the spreadsheet with the necessary information and returns it to Cisco, a quote will be **generated in SCC** where it can be retrieved. It is the partner's responsibility to validate and ensure the information is correct as well as provide any missing information. This information will help the partner in identifying renewal opportunities as they near expiration.

As part of the above documentation, a schedule of the following due dates are provided:

- Notification Date
- Equipment Validation and EU/Serial Number Due Date
- Purchase Order Due Date

Upon receipt of the purchase order, the product will be entitled under a Cisco Shared Support contract at the minimum service level (CSSPD). Partners may choose to upgrade to other Cisco Shared service levels as required.

Service Renewals

Equipment covered under a Cisco Shared Support one year contract will require renewal from the 13th month forward and quotations and orders may only be created on Cisco's Service Contract Center (SCC). For partners who do not have existing business practices for renewing end customer service agreements on an annual basis, processes, systems and personnel may be required to proactively capture renewal revenue opportunities.

Specifically measuring annual service renewal rates can provide partners with increased focus on this element of their business and assist in understanding the cost/benefit of the service renewal business. By focusing on service renewal bookings, revenue and margins, there is an improved awareness of service renewal opportunities, contributing to sustained revenue streams and avoiding gaps in a customer's support. To this end, documented contract renewal processes can drive both improved service coverage and more effective sales operations through capture of, and adherence to, managed processes. Additionally documented processes support the training and education of new staff and allow improved quality of sales service to customers.

Cisco Systems, Inc All contents are Copyright © 2004 Cisco Systems, Inc. All Rights Reserved. Important Notices and Privacy Statement. Page 42 of 89 By proactive management of renewals and advance notification to end customers of renewal prior to contract expiration, partners may drive improved communications with customers, assist them in budgeting for their support requirements and decrease the risk of customers' critical communications systems becoming unsupported.

The practice of automatically generating and sending renewal notifications when contracts approach expiration offers the customer the opportunity to renew service agreements without delay and may assist in ensuring that there are no lapses in coverage. Partners may wish to establish a formalized and automated process for sending renewal notifications to customers before service agreement expiration. Such a process could involve the sending of various staged renewal notifications in the months before contract expiration. In association with notices, the partner would work with the customer to define appropriate services levels and terms for each piece of equipment as well as all arrangements for invoicing and service agreements updating. While automatic cancellation of un-renewed service contracts can assist in preventing the support of un-entitled equipment there are risks that delayed renewals processes may lead to unplanned for contract termination and customer satisfaction issues and risks to customers important communications capabilities.

Since the successful close rate for service sales opportunity may dramatically decrease the longer an opportunity goes uncovered, it is recommended that partner sales management plan, review, and take actions on renewal opportunities on at least a monthly basis.

Managing the renewal of service contracts requires tracking and identifying end customer service contracts that are due for renewal as well as the review of equipment installation site. Partners may benefit from the establishment of processes and contract management systems functionality that automatically reports each month on which customers have service contracts requiring renewal to sales staff. Cisco Shared Support agreements that are due for renewal may be monitored using reports available on SCC. Partners should be proficient in the use of SCC as this is also the mechanism by which they may renew service contracts. Without proactive and rigorous attention to service sales, decreases in performance metric levels can result in reduced discount levels and may eventually lead to a reduction in a partner's ability to compete in the market.

You can refer to the Renewals Handbook for more detail. You can ask your Cisco Representative for a copy if your organization has not received a copy.

Service Contract Center

Service Contract Center (SCC) is used to create quotes and contracts, renew contracts, upgrade service, and update customer information. This information can then be provided to any customer electronically or verbally with just a few clicks of the mouse. It's accessible anytime, anywhere.

A comprehensive SCC tutorial is available at:

http://www.cisco.com/public/scc/internal/lesson00_topic00_page01.shtml

Identifying Renewal Business

The Renewal Business Summary allows you to identify renewal opportunities and manage your renewal business. You may view your contracts that are due for renewal in the next 90 days. They will then need to determine which items need to be renewed for each customer, create renewal quotes, and submit them online. Renewals quotes need to be created for each contract with items that are due to expire. In addition, ordering service without product (for products purchased via a distributor) will also have to be done through SCC.

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Service Contract Center									
CONTRACTS	20	OTING & DRDERIN	<u>6</u>	PRICING & AVAILABILIT	C PACKAG	ED SERVICES	ADMINISTRATION		
My Contracto Renewal	Mz Santinada (Renewal Business Summary) Mew Balanci Status Sule								
Quick Search	Contract N	lunber 💌		Bel Advanced Sea	usia				
Renewal Summary : I	ast updated o	n August 30,2	1 004,09 :32A	IM PST					
3	Net Contract Amount	Number of Contracts	Net Quote Amount	Number of Quotes Created by Partner	Number of Quotes Created by SSR				
Past Due (31-90 Days)	14,458	3	0	0	0				
Past Due (0-30 Days)	109,799	27	0	0	0				
Expires in 90 Days	203,578	9	0	0	0				
Net Renewal Opportunity	327,830	5				_			
Net Total (All Contracts)	46,283,773	21							
Download 4)								
Contract Summary Query				6					
End Customer Name			'To view ALL, le	ave it blank					
Contracts Expiring In		Days (Inclu	dex Part Due Ci	on tracts)					
Submit									
SIS type contracts are exclude	d in the renormal app	otunity							
Tip 2 Yos can guery any part of the	outomer name. (Fin	example: Entering	"STATE" will a	earch for all ourtomets with	*STATE' in their name)				

1. Click the Contracts tab.

2. Click the Renewal Business Summary link.

The Renewal Business Summary page displays.

Note: The date and time displays the last time the renewal business summary page was last updated. A 24-hour timeframe is needed to see all contract changes in Renewal Business Summary.

3. Select one of the following links to display the category of expiring contracts that you would like to view:

- Past Due (31-90 Days)
- Past Due (0-30 Days)
- Expires in 90 Days

The Customer Detail page displays where you can view additional details.

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	Service Co	ontract Center								
	CONTRACTS	OUDTING & DRDER	ING	PRICING & AVA	ILABILI TY	PACK	AGED SERVI	ICES	ADMINISTRATIO	N
10-5 June Renewal Business Summary View Request Status SHL Customer Detail										
Search (Color co Select (criteria : der for Emirati Das 💽 Sela	cl Action		Contracts Past Due Needly Expired, Ex Submit	31-90 Days quiring in 1 to !	00 Days, Not I	Expiring			
Select	Customer Nama	Service Level	Contract Number	Earliest Expiration Date	Amount PastiDua 31-90 Days	Amount Past Due 0-30 Days	Amount Expires in 90 Days	Net Contract Total	Quote Number(s)	Net Quote Amount
	COLGATE UNIV	BNT	1000520	30-JUN-2005 Renew	3,600	0	0	300,299	03859555 OF 03859654 OF	
	ELECTRONIC DATA SY	STEMS SNT	1000520	28-JUL-2004 Renew	1,664	54,693	37,942	300,299	23859655 OR 23859654 OR	

4. To download the summary page, click <u>Download</u>. SCC will prompt you to open or save the Microsoft Excel file.

5. To perform a Contract Summary Query for a particular End Customer, scroll down the Renewal Summary page.

- a. Enter an End Customer Name
- b. Enter the number of days that you would like to view your expiring contracts.

c. This query will return a complete list of customers with bill-to names that contain the name you entered.

Note: To view all customers from all contracts, leave all fields blank.

6. Click Submit

7. The Customer Detail page displays with a list of customers who have expiring contracts in the category you selected. The following information displays:

- Customer Name
- Amount Past Due 0-30 Days
- Service Level
- Amount Expires in 90 Days
- Contract Number
- Net Contract TotalQuote Number(s)
- Earliest Expiration Date Quote Nu
- Amount Past Due 31-90 Days
 Net Quote Amount

Note: You may download a list of contracts expiring in 120 days or more from today by selecting **All** in the first drop-down menu, select Download with product details in the second drop-down menu, and then click Submit.

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8. Click Renew next to the contract number to generate a renewal quote for the contract you selected.

Quick Tips

Cisco Brand Resale (SMARTnet®, SAS/SASU, Cisco Shared Support and Cisco® Complement (LLW category D products) are the only services that can be renewed online.

If you do not know the end customer name, you may perform a customer query with any part of the customer name. For example, if you enter "STATE" it will search for all customers with STATE in their name.

Moves, Adds, and Changes Process Flow

Process Flow for Moves, Adds, and Changes



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Process flow for takeovers

Process Flow for Takeovers initiated by overtaken partner Takeovers





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Delivery

Service Delivery, under the Cisco Shared Support program, introduces several significant changes to partners who will be migrating from legacy programs. Partners' delivery organizations will be requested to provide additional information to Cisco in order to execute against partners' delivery requirements. This user guide will provide information you will need in order to open a service request with the Technical Assistance Center (TAC) and how to open a Return Material Authorization (RMA).

Entitlement

The Cisco Shared Support program, just like SIS, requires that partners initiate end-customer service requests with Cisco; end-customers can not open a service request directly with Cisco.

Entitlement Compliance and Reporting

Entitlement compliance enables Cisco to support our ability to deliver contracted services to you. Cisco will monitor service entitlement compliance regularly with back-end reporting.

Getting Access to the TAC Service Request Tool – Update the CCO Profile

For partners to open a service request via the Service Request Tool on behalf of their end users, the partner needs to have their end user contract number in their CCO profile.

To update the CCO profile, the following steps need to be taken:

- Login in to CCO.
- Go to the following URL: <u>http://tools.cisco.com/RPF/profile/profile_management.do</u>
- Make the appropriate changes and submit online.
- A service request is opened requesting a change in profile.
- Within approximately 24 hours, the change will be made to the CCO profile.

Changes to an Individual User Access can only be made by PICA Administrators

- From the PICA home page: <u>http://www.cisco.com/xent/pica_admin_tool.shtml</u>
- Click to launch the PICA Admin Tool
- Click the 'View PICA Numbers' tab to view all Registration Number information.
- Locate the Registration Number that needs to be changed and select it. All of the users associated with that PICA Number will appear.
- Select the User ID of the person that needs to be changed. The PICA End User Profile screen will appear.
- Select the option that needs to be updated.
- Click 'Change User Profile'

The Cisco Technical Assistance Center (TAC) provides 24x7 follow-the-sun technical support services for Cisco products and technologies. Partners, on behalf of their customers, are encouraged to open a service request via Cisco's online TAC Service Request Tool or via telephone for critical situations (See Severity Below)

What Determines Severity?

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It is important to realize that the severity definitions use one primary issue and one secondary issue to determine priority. The primary issue is business impact to the end user. Questions that may be asked during a priority discussion include:

- What is the business impact at this point to the end user's company?
- Is their network down?
- Is this a production network that is affecting the end user's operations?
- Is there a work-around in place?

• Are most business operations continuing, even though this issue is impacting their network performance? The secondary issue is the amount of resources the end user is willing to commit to resolve the problem. Is the end user willing to work "around the clock" to resolve the issue? Willingness of the end user to dedicate resources is a consideration in determining priority; however, the most important item in priority determination is business impact to the end user.

Cisco highly recommends that before opening a TAC service request that partners attempt to find answers to their questions by searching through Cisco documentations and tools on Cisco.com online Technical Support.

If a Customer or Partner has a Severity 1 (Network Down) or 2 (Network Emergency) type Service issue, they should Call TAC to open a Service Request. Partners can reference Cisco TAC phone numbers by country via this URL: <u>http://www.cisco.com/warp/public/687/Directory/DirTAC.shtml</u>

If a Customer or Partner has Severity 3 or 4, partners are encouraged to open a TAC service request, on behalf of their end customers, via Cisco's online TAC Service Request Tool.

Global Call Center (GCC) Entitlement Flow

Severity 1	Production network is down, causing critical impact to business operations if service is not restored quickly. No work around is available. Cisco and the customer are willing to commit substantial resources around the clock to resolve the situation.	TAC Worldwide Contacts: http://www.cisco.com/warp/public/687/ Directory/DirTAC.shtml
Severity 2	Production network is severely degraded, impacting significant aspects of the business operations. No workaround is available. Cisco and customer are willing to commit full-time resources during business hours to resolve the situation.	TAC Worldwide Contacts: http://www.cisco.com/warp/public/687/ Directory/DirTAC.shtml
Severity 3	Network performance is degraded. Network functionality is noticeably impaired, but most business operations continue.	www.cisco.com/tac/caseopen
Severity 4	Customer requires information or assistance on Cisco product capabilities, installation or configuration.	www.cisco.com/tac/caseopen

The Cisco Shared Support program, just like SIS, requires that partners initiate end user services requests with Cisco; end users can not open a service request directly with Cisco.

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TAC Service Request Tool

The TAC Service Request Tool is an online tool allowing partners, and Cisco personnel to open and query service requests online. The TAC Case Open Tool and the TAC Case Query Tool have been combined into one tool, the **TAC Service Request Tool.** You can use this tool to create new service requests or to query existing service requests.

End users can access the TAC Service Request Tool to query the status of their service requests. If a partner has a Severity 1 (Network Down) or Severity 2 (Network Emergency) type service issue, they should Call TAC to open a service request.

The Service Request Tool can be found at:

http://tools.cisco.com/ServiceRequestTool/create/launch.do

The TAC Service Request Tool allows you to:

- Open severity 3 and 4 service requests and, after you describe your service request online, the tool recommends resources that may provide a solution immediately
- Check the current status of open service requests
- Update open service requests with your own notes
- Attach files to open service requests
- View service requests closed within the last 18 months

How to Use the Tool

There are five main steps for opening a Service Request using the TAC Service Request Tool. Some of the steps have multiple steps within it, but in general there are five sections involved in the Service Request Open process.

- Problem Definition
- Solutions
- Contact Information
- Service Entitlement
- Additional Details

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Recent Changes to the Tool

New Terminology

- Cases are now called Service Requests
- Priority is now called Severity
- Contract types are now called Contract Service Lines
- End Customer Ticket Number is now called Helpdesk Tracking Number
- End Customer Ticket Number Create Date is now called Helpdesk Tracking Number Create Date

Number Format

- The format of your service request number will also look different (formerly your case number).
- The format will now be 9 digits starting with the number "6"
- Example: 6NNNNNNN (N=number)

Changes to the Tool

- You will now receive recommended solutions before you create a service request.
- You will no longer be able to create users within the tool.

• Service Entitlement is now a multi-step process, requiring specific information to determine entitlement to service. Successfully completing the entitlement process is required to create a service request that accurately reflects the services to which the customer is entitled.

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Generating TAC Cases via the Service Request Tool

TAC Service Request Tool Process Flow



TAC Service Request via Web: In the event the partner does not provide a contract number, product number and site location when opening a TAC service request via the Web, using the TAC Service Request Tool, a warning message will alert the partner that they have missed a field, and they will be given another opportunity to fill in the field.

IMPORTANT: The service request will not be created unless these three fields are populated.

Tracking Service Request Status

The end user will be able to check on the status of their service requests from the Web site at any time. The Service Request Tool can be used for querying service request at the following URL: <u>http://tools.cisco.com/ServiceRequestTool/create/launch.do</u>

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Step 1: Problem Definition

This section will ask you to select Technology, Sub technology, Problem Summary, and Detailed Problem Summary from a pull down list.

0	Close Window				Toolkit: Roll over tools below
CISCO SYSTEMS					Eeedback Help
TAC Service Reque	st Tool New R	equest			
1. Problem Definition	on	2. Solutions	3. Contact Information	4. Service Entitlement	5. Additional Details
Describe the problem us problem on the next page	ing the fields below. e, if solutions exist.	Choose the item in each fi	eld that most closely matches the pro	blem. Your selections will return TAC	Logged in as C-recommended solutions to your
1. Technology	Selec	t One	💌 * required		
2. Subtechnology	Selec	t One 💌 * required			
3. Problem Summary	Selec	t One 💌			
4. Detailed Problem Sur	mmary Selec	t One 💌			
	Next				
Connect to Cisco L Need help creating a se	ive! rvice request? Talk t	o us now.			
Close Window					

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- 1. Choose the Technology that best applies to your problem or Cisco product. Only select OTHER if no Technology applies to your service request.
 - 2. In the Sub-technology Field, make a selection to help narrow down your problem.

3. In the Problem Summary and Detailed Problem Summary Fields, either select the most appropriate options or leave the fields blank.

4. Click the Next button.

Step 2: Solutions

The tool will either provide link(s) to TAC Recommended Solution(s), or indicate that no TAC Recommended Solutions matched your service request description.

Cisco Systems Ck athlinaathlin TAC Service Request T	ise Window			Toolkit: Rol over tools below
1. Problem Definition	2. Solutions	3. Contact Information	4. Service Entitlement	6. Additional Details
TAC Recommended Sol	utions			Logged in as:
View the cannot get into ROM	non mode to download IOS case in TAC C o solve your problem? * required	ase Collection		
C Yes, I've solved my proble	m			
C No, I'd like to create a ser	vice request			
Back Next Connect to Cisco Live! Need help creating a service	request? Talk to us now.			
Close Window				

If TAC Recommended Solutions Are Provided:

1. Click the solution link(s), and review the suggested document(s).

2. Return to the TAC Service Request Tool screen. Answer the question: *Did these solutions help you solve your problem?* Click the **Next** button.

3. If the provided links resolved your service request, select YES, I'VE SOLVED MY PROBLEM. At this time you can choose to define another problem or complete the survey about this tool.

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4. If your response is, NO, I'D LIKE TO CREATE A SERVICE REQUEST, click the **Next** button, and you will continue the process of creating a service request.

If No TAC Recommended Solutions Are Available:

If no TAC Recommended solutions matched your description, click the **Next** button, and continue the process of creating a service request.

Step 3: Contact Information

3.1 Provide the Cisco.com username or use the hyperlink to search for the username.

If you need to create a Cisco.com username you will need to use the hyperlink *Cisco.com Registration and Lookup*. You are not able to create users within the TAC Service Request Tool. After creating a new Cisco.com username, you will be able to use the username immediately to create a service request on their behalf.

CISCO SYSTEMS	Close Window				Toolkit: Roll over tools below E Roll were tools below Feedback Helo
TAC Service Requ	est Tool New	Request			
<u>1. Problem Definit</u>	tion	2. Solutions	3. Contact Information	4. Service Entitlement	5. Additional Details Logged in as: <u>elijimen</u>
Cisco.com username	o.com user io or the	required	Cisco.com Rec	iistration and Lookup	
		Back	Next		
Connect to Cisco I Need help creating a se	Live! ervice request? Talk	to us now.			

Enter the Cisco.com username and click the Next button. You will be taken to the screen that the customer views.

This section will list and allow you to update the following:

First Name Last Name Preferred Method of Contact (Phone or Email)

Cisco Systems, Inc All contents are Copyright © 2004 Cisco Systems, Inc. All Rights Reserved. Important Notices and Privacy Statement. Page 55 of 89 Preferred Phone Number

Preferred Email Address

Would you like an email confirmation of this service request?

0	Close Window				Toolkit: Roll over tool s below
utility					Eeedback Help
TAC Service Reque	st Tool New Re	equest			
1. Problem Definition	n	2. Solutions	3. Contact Information	4. Service Entitlement	5. Additional Details
Please specify how we sl	iould contact you for t	this service request.			Logged in as
First Name		Cisc	o.com Profile Manager		
Last Name					
Preferred Method of Cont	act	C Phone	C E-Mail * required		
Preferred Phone Number From my profile			Update Permanent Pho	ne Number	
C Temporary number	er				
Preferred E-Mail Address					
From my profile			Update Permane	nt E-Mail Address	
C Temporary addres	s				
Would you like an e-mail request?	confirmation of this s	ervice C Yes	• No		
		Back	Next		
Connect to Cisco L Need help creating a service	<u>ve!</u> vice request? Talk to	us now.			

3.2 Choose the preferred method of contact: Phone or E-Mail.

3.3 You have three options for specifying the contact information. You can:

- Select the Preferred Phone Number or E-Mail Address from the drop-down lists.
- The customer can click the hyperlink <u>http://tools.cisco.com/RPF/profile/profile_management.do</u> to update their Permanent Information. They will be taken to the CPR Profile Management Tool, which allows them to update their permanent information such as: phone numbers, e-mail addresses, personal information. Reload the page to view the updates as options on the drop-down list for Preferred Phone Number and Preferred E-Mail address.

**Note- Only customers should use the provided hyperlinks to update their permanent information. GCC/CIN agents should use their admin tool to update the customer's CPR Profile.

 Select the TEMPORARY NUMBER or TEMPORARY ADDRESS radio button and enter the information in the text field. This temporary contact information will only be used for the life of this service request. If the customer would like to update their permanent information they need to use the provided links.

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3.4 If the customer would like to receive an e-mail confirmation of their service request, answer YES to the question at the bottom of the screen.

3.5 Click the Next button.

Step 4: Service Entitlement

Accurate Service Entitlement is required to ensure proper handling of a service request. The Service Entitlement step of the service request open process has five steps within it. The first step will ask you to provide the serial number of the actual product you are opening a service request on or a contract number that entitles you to support. If you enter a serial number you skip all other steps to the "Accept Entitlement" screen which acts as a confirmation page. If you enter a contract, you will then move to the next selection type which is site information, then product family, then the actual product, and finally the Accept Entitlement Screen.

0	Close Window	100 C			Toolkit: Roll over tools below
UISCO SYSTEMS					
TAC Service Reques	st Tool New Requ	est			
1. Problem Definition	2 2	Solutions	3. Contact Information	4. Service Entitlement	5. Additional Details
Serial Number or Cor	ntract > Location of Proc	duct > Product Family > Pr	oduct > Accept		
					Logged in as
If you have your product se	rial number enter it here	. This will expedite your e	entitlement process.		
Serial Number		Cisc	o Product Identification Tool		
	* shortout				
	OR				
If you do not have a serial r	number, select a contrac	t number.			
Contract Number	Select	One	•		
	Back	Next			
Connect to Cisco Liv Need help creating a serv	ret ice request? Talk to us r	10W.			
Close Window					

For each section you will have choices which derive from the choice in the step above. For example, if you pick Contract A then your choices for site information would be sites associated with Contract A.

Also for any section, you will have the option to select "my ##### is not listed here" or "I don't know my #####"

Once you reach the "Accept Entitlement" screen, you will have the option to make changes to any option you selected by hitting "edit" next to the information that needs to be changed.

In some instances, it may take multiple steps to ensure the proper information has been captured.

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Serial Number Provided (shortcut)

Serial Number>Accept

Because the product Serial Number is the most direct means of identifying the customer's entitlement data, the quickest path to complete the Service Entitlement process is to enter the Serial Number of their product. Please use the <u>Cisco Product Identification Tool</u> if you need help locating your Serial Number.

Enter the Serial Number and click the **Next** button. You will be taken to the final screen in the entitlement process, the Confirmation screen. Here you can review the information provided and make any necessary edits. If the information is accurate, click the **Accept** button.

**Note: Warranty Information

If the customer has an expired warranty and no contract number in their profile they cannot continue creating service request. However, if the warranty has expired and there is a Contract Number in their profile, they can continue to open a service request. Also remember that a warranty is insufficient to query their service request.

Full Entitlement Process

Contract Number>Location of Product>Product Family>Product>Accept

The TAC Service Request tool allows you to specify not just the Contract Number, but also the Location, Product Family and Product. The tool will guide you through this process and provide Advanced Search options, which will help you find the appropriate information easily.

1a. Select a Contract Number from the list provided, and click the **Next** button. The Contract Numbers provided are those associated with the customer's Cisco.com profile.

OR

1b. Enter the customer's Contract Number in the Contract Number text field.

OR

1c. If the Contract Number is not visible, you can select SEARCH FOR A CONTRACT. The next screen will be the Advanced Contract Search screen, which will collect more information in order to retrieve the correct Contract Number.

2. After completing the Contract Number step, the following screens will ask you to provide information about Location of Product, Product Family, and Product. If you need to use the Advanced Search option on these screens, click on the NARROW THESE RESULTS hyperlink located at the top of the tables.

3. The final screen in the entitlement process will be the Confirmation screen, where you can review the information provided and make any necessary edits. If the information is accurate, click the **Accept** button.

Serial Number Required

Cisco Systems, Inc All contents are Copyright © 2004 Cisco Systems, Inc. All Rights Reserved. Important Notices and Privacy Statement. Page 58 of 89 Contract Number>Location of Product>Serial Number>Accept

Some Cisco service programs require a Serial Number to verify accurate entitlement. We determine when a Serial Number is required based on the contract and location you select.

1a. Select a Contract Number from the list provided, and click the **Next** button. The Contract Numbers provided are those associated with the customer's Cisco.com profile.

OR

1b. Enter the customer's Contract Number in the Contract Number text field.

OR

1c. If the Contract Number is not visible, you can select SEARCH FOR A CONTRACT. The next screen will be the Advanced Contract Search screen, which will collect more information in order to retrieve the correct Contract Number.

2. On the next screen select the Location of the Product from the table, and click the **Next** button. If you need to use the Advanced Search option on this screen, click on the NARROW THESE RESULTS hyperlink located at the top of the table.

3. Some Cisco service programs require a Serial Number be provided to verify accurate entitlement. We determine if a Serial Number is required based on the contract and location you select. Enter the Serial Number and click the **Next** button. Use the <u>Cisco Product Identification Tool</u> if you need help locating the Serial Number.

4. The final screen in the entitlement process will be a confirmation screen, where you can review the information provided and make any necessary edits. If the information is accurate, click the **Accept** button.

Location, Product or Product Family not selected

Contract Number>No Location Selected>Accept**

**Also includes: No Product Selected or No Product Family Selected

If the customer is unable to provide the appropriate: Location, Product, or Product Family, you can select MY SITE IS NOT LISTED HERE or I DON'T KNOW MY SITE. You will continue the Service Entitlement process and the appropriate fields will be listed as "Unknown" on the Confirmation screen.

1a. Select a Contract Number, and click the **Next** button. The Contract Numbers provided are those associated with the customer's Cisco.com profile.

OR

1b. Enter the customer's Contract Number in the Contract Number text field.

OR

Cisco Systems, Inc All contents are Copyright © 2004 Cisco Systems, Inc. All Rights Reserved. Important Notices and Privacy Statement. Page 59 of 89 1c. If the Contract Number is not visible, you can select SEARCH FOR A CONTRACT. The next screen will be the Advanced Contract Search screen, which will collect more information in order to retrieve the correct Contract Number.

2. The next screen will be the Location of the product screen. If you need to use the Advanced Search option on this screen, click the NARROW THESE RESULTS hyperlink located at the top of the table. You can also select either MY SITE IS NOT LISTED HERE or I DON'T KNOW MY SITE, and click the **Next** button.

*Product and Product Family screens also allow you to select either Not Listed or Not Known. Step 3 will apply to the applicable fields.

3. Click the **Next** button. You will go directly to the final screen in the entitlement process, the Confirmation screen. On this screen all the appropriate fields will be listed as "Unknown".

4. Review the information provided on the Entitlement Confirmation screen and make any necessary edits. If the information is accurate, click the **Accept** button.

Bypass Entitlement Escalation

Bypass Entitlement>Accept

A Cisco employee can select BYPASS ENTITLEMENT ESCALATION in the Contract Number dropdown list. This should only be used when the service request is an internal Cisco service request. If you are opening a Severity 1 or Severity 2 service request on behalf of a customer please use the <u>proxy step</u> and you will be able to use their appropriate entitlement information.

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Step 5: Additional Details

• In this section you will have the opportunity to Add Details, Confirm, and File Upload.

Add Details

TAC Service Request Tool New Request							
1. Problem Definition	2. Solutions	3. Contact Information	4. Service Entitlement	5. Additional Details			
Add Details > Confirmation > File U	Upload						
				Logged in as			
Technology		Router and IOS Architecture Issues					
Subtechnology		IOS Upgrade and Recommendation A	ssistance				
Problem Summary		Cannot get into ROMmon to install IOS	6				
Detailed Problem Summary							
Service Request Title		Cannot get into ROMmon to install I	OS	* required			
Problem Details				*			
				× required			
		30000 characters remaining					
Software Version							
Router/Node Name for the primary d	levice on this service request						
Helpdesk tracking # with your compa	any						
PICA ID							
Helpdesk tracking # create date		Year Vonth Day					
End-Customer E-Mail ID							
Is this service request associated w	ith an interruption of service?	C Yes C N0 * required					
		Next			•		

- 1. The customer can choose to edit the Service Request Title.
- 2. Provide any relevant Problem Details.
- 3. Enter the Software version: this will help in resolving the service request.

4. Router/node name and Helpdesk Ticket Number fields are for the customer's convenience. Provide this information if they would like to link this service request to their company's tracking references.

5. Employees will have the following fields: Helpdesk Tracking Number Create date, End Customer E-Mail ID, PICA ID (Partners only-format LLLNNNN, L=Letter, N=Number). These fields will not be visible to the customer.

6. Answer the question: Is this service request the result of a network outage?

7. Click the Next button.

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Confirmation

The next screen will summarize all the information that you have provided for this service request. Review the information and click the Edit hyperlink if you need to make any changes.

TAC Service Request Tool New Request						
1. Problem Definition	2. Solutions	3. Contact Information	4. Service Entitlement	5. Additional Details		
Add Details > Confirmation > Fie Upload						
Important				Logged in ea		
You will not be able to edit this information or	return to previous pages	once you click Submit.				
Problem Definition						
Technology	Router an	d IOS Architecture Issues				
Subtechnology	10S Upgra	de and Recommendation Assistance				
Problem Summary	Cannot ge	t into ROMmon to install IOS				
Detailed Problem Summary						
Contact Information						
Name						
Preferred Method of Contact						
Preferred Phone Number						
Preferred E-Mail Address						
Service Entitlement						
Serial Number						
Contract Number						
Location of Product						
Product						
Service Request Details						
Service Request Title	PLEASE D	ISREGARD THIS SERVICE REQUEST				
Software Version						
Problem Description	PLEASE D Note: the pr the TAC en	ISREGARD THIS SERVICE REQUEST + th oblem description has been thun cated here on pineer.	its As I am creatin into limit the summary page length. Your-	entire problem description will be sent to		
Router/Node Name						
Helpdesk tracking # with your company						
PICAID						
Helpdesk tracking # create date						
End-Customer E-Mail ID						
Is this service request associated with an inte service?	enuption of					
Important. You will not be able to edit this information or	return to previous pages	once you click Submit.				
	Submit	1				

Click the Submit button once you have confirmed all the information on the screen is accurate.

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Upload Files

The File Attachment Upload feature enables you to attach up to three files containing additional information. This additional information is attached to the service request and is used by the engineer to help resolve the outstanding issue. Note: Files are uploaded without encryption at this time.

TAC Service Request Tool New Request						
1. Problem Definition	2. Solutions	3. Contact Information	4. Service Entitlement	5. Additional Details		
Add Details > Confirmation > File Up	load					
Use the fields below to upload up to	three files at one time (totaling 20 M	B) to your service request. Note: File	s are uploaded without encryption at	Logged in as this time. Click Next to continue.		
If you have no files to upload, click N	ext.					
File 1						
File Name			Browse			
Comments for TAC			A			
			-			
File 2						
File Name			Browse			
Comments for TAC						
			-1			
File 3						
File Name			Browse			
Comments for TAC			~			
			-			
		Nevt				
		- tox				

To upload files:

1. Select a file to be uploaded by clicking the Browse button and choosing a file from your local directory.

2. Select a file type signifying the type of file being uploaded. To ensure the file is processed properly, it is important to select the correct file type.

- 3. Enter any additional information in the File Notes field.
- 4. Repeat Steps 1-3 if you wish to upload additional files.
- 5. Submit the file(s) to be uploaded by clicking the Next button.

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Step 6: Service Request Completed

Once you have completed the task of opening a service request, you will come to a "Thank You" Screen. On this screen you will see the following.

- You will receive a Service Request Number. They are 9 digits long. (ex 60000002).
- You will see a note to inform you that A Technical Support Agent will contact you shortly
- You will have a link to click on to update or see the status of your service request.
- You will have a link to click on that will allow you to open another service request.

CISCO SYSTEMS	Close Window			Toolkit: Ro	oll over tools below 2 Help
TAC Service Requ	est Tool New Re	quest			
Thank you!					Logged in as: <u>elijinen</u>
Please Note: You have created serv support engineer will	ice request number <u>60</u> contact you soon regard	10744129 . A technical ding this request.			
Click <u>here</u> to update or c Click <u>here</u> to create anot Connect to <u>Cisco</u> Need help creating a se Close Window	heck the status of your her service request. <u>ivet</u> evrice request? Talk to r	service requests. Is now.			





Return Material Authorization (RMA)

In order to replace any faulty parts, partners will need to create a Return Material Authorization (RMA) after engineers have performed troubleshooting. You will continue to use existing practices.

Software Delivery

For IOS software downloads, partners can retrieve them at Cisco.com

IOS Software

- Updates are included in support agreement Major, minor, maintenance those are available to end-users within their license feature sets.
- Feature Set Upgrades separately purchased and licensed IOS software that includes additional functionality Feature Set Upgrades are not included within support contracts.
- Application Software
- SAS maintenance and minor releases are available.
- SASU (SAS plus Upgrades) includes major, minor, and maintenance releases.

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My Colleagues Aggregate Tool

The My Colleagues Aggregate Tool, an external facing administrative tool, will entitle users to open Service Requests and RMAs against specific contracts. The tool enables a company to view and manage, (add/remove contracts by BIDs), users who are registered on Cisco.com under specified Bill-to-Ids. My Colleagues Aggregate access is granted to employees within a company who have been designated as External Administrators for their company by a Cisco account team representative. Using this tool, all contracts related to BID(s) can be added or removed by marking/unmarking the BIDs, individually from users' profiles.

Accessing My Colleagues Aggregate Tool

Your Sales Support Representative, Channel Service Account, or World Wide Partner Support contact will work with you to identify who will be the external admin(s) for your company.

- Admin candidate must have company name in Cisco.com profile
- Admin candidate must have company domain name in email domain
- Admin candidate must have company BIDs in Cisco.com profile

Admin and CCO users can add BIDs to Cisco.com profile by sending email to <u>ic-support@cisco.com</u> including User ID, User's Name, Company Name, and BID(s) to be added.

The following instructions are to be used *after* you and your CSAM have determined who your External Administrators should be and the CSAM has gained the appropriated access to the tool.

Step 1 – Login to CCO Step 2 – Click on 'Profile'

WEICOMETOLOSCOSYSTEMS Durbass Strategies A Lean abod fonds, thatgies, and soldions that can help solve ortical burbass problems, dynamic burbasses, and enable burbasses problems, dynamic burbasses, and enable burbasses problems, and the solve ortical burbasses problems, and the solve o	In Sele	ct an Area	🖻 🔤 Log In
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Select an Area WELCOME TO CISCO SYSTEMS Welcome and the selection of the sel	CISCO SYSTEMS		Home Log In Profile
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WELCOME TO CISCO SYSTEMS Business Strategies & Learn abox frends, trategies, and southons that can help solve orbital business proble grant business and enable business problems Strategies & Learn abox frends, trategies, and southons that can help solve orbital business proble grant business and enable business problems Strategies & Learn abox frends, and southors and solve and southors Strategies & Learn abox frends, and southors and solve and southors Strategies & Strategies & Learn abox frends, and southors Strategies & Learn abox frends, and southors Strategies & Strategies & Learn abox frends, and southors Strategies & Str		Select an Area	
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Cisco Systems is the working the leader in revoluting for the Method States VELCOME TO CISCO SYSTEMS Cisco Systems is the working designed to states I.exin about heads, indicating and indication that can help solve ortical business proba- difficult business probability. Cisco Systems is the working designed to states Encode to states Cisco Systems is the working designed to states Encode to states Cisco Systems is the working designed to states Encode to states Cisco Systems is the working designed to states Encode to states Cisco Systems is the working designed to states Encode to states Cisco Systems is the working designed to states Encode to states Cisco Systems is the working designed to states Encode to states Cisco Systems is the working designed to states Encode to states Cisco Systems is the working designed to states Encode to states Cisco Systems is the working designed to states Encode to states Cisco Systems is the working designed to states Encode to states Cisco Systems is the working designed to states Encode to states Cisco Systems is the working designed to states Encode to states Cisco Systems is the working designed to states Encode to states			
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Annotation A		Solutions	 Learn about renus, strateges, and socions that can help solve chocal busitess problems, optimize busitesses, and enable busitess productivity.
Betworking Selections Selections Set Devolutions Selections Set Devolutions Services Devolutions Services Devolutions Services Devolutions Services Devolutions Services Devolutions Devolution Devolutions D	THE TOTAL	Solutions	ogeneto oscencosos, ena criaco oscencos provecenty.
Exclusion Services Exclusion Service Exclusion	THE PERSON PERSO	Networking Solutions &	 Discover how Cisco networking designs, products, and solutions can provide the quality of
Card Systems in the Model is a Service: Leven adout products and services available for Occup, and the information on product services available for Occup, and the information on product services available for Occup, and the information of product services available for Occup, and the information of product services available for Occup, and the information of product services available for Occup, and the information of product services available for Occup, and the information of product services available for Occup, and the information of product services available for Occup, and the information of product services available for Occup, and the information of product services available for Occup, and the information of product services available for Occup, and the information of product services available for Occup, and the information of product services available for Occup, and the information of product services available for Occup, and the information of product services available for Occup, and the information of the information	and the second se		nervice systemity and security that focial/s internet horses regime
Cisco Systems is the variable of the second		Provisioned Services	service, availability, and security that today's internet businesses require.
Sector State Technologies Pressuesch the technologies that support your network ist naturduure. In Technologies that support your network ist naturduure. The technologies that support your network ist naturduure. The technologies and support support your network ist naturduure. The technologies and support support your network ist naturduure. The technologies and support support your network ist naturduure. The technologies and support support your network ist naturduure. The technologies and support support technologies and support support technologies and support support technologies and support support technologies and supportechnologies and technologies and technologies and te		Products & Services	service, availability, and security that today's internet businesses require. Easin about products and services available from Cisco, and find information on product resolutions of products and services available from Cisco.
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Profile Manager – Additional Access

Scroll down the page and click on the My Colleagues Aggregate on Cisco.com link to view who is registered on CCO under your BIDs.

The My Colleagues Aggregate on Cisco.com link is only viewable to users with External Admin access.

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Fax:
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🄮 Internet

Viewing CCO Users

r E Done

the External Admin.

The External Admin can now view relevant users from their company who are registered on CCO with the BIDs of

The listing below shows users from your organization who are registered on Cisco.com with the Bill-to-ID(s) you monitor through this tool. All Users are imitally. You can filter the listing by selecting one or more Bill-to-IDs in the box below, and clicking the "Show Selected Bids Only" button. This will disp those users who have the selected Bill-to-IDs in their profiles.	: displayed lay only
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The "My Colleagues Granular" tool enables an authorized administrator from your organization to add and remove Cisco Systems service contracts/ Cisco.com user profile. As an administrator, you can easily update the user profiles associated with your contracts, at the granular level. Please click: <u>My</u> <u>Granular Link</u> to toggle to the tool. Using this tool, contracts are added individually to user's profiles.	s) from a <u>r Colleagues</u>
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Selecting CCO User

Check one or several user Id(s) that you want to review and click "Add/Remove Contracts by BID" button.

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Add/Remove Contracts by BID

Check or uncheck the BIDs to add or remove contracts by BID and click "Add/Remove Contracts by Bill-to-IDs" button. BID has to reside in both Ext Admin & User's CCO profile in order to be displayed here.



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Mark/Unmark BID

Review the BID(s) that have been marked or unmarked for the CCO user.

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Email Notification

An email will be sent to the CCO user notifying them of marked/unmarked BID(s) in their profile.



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Operating Practices

Operating Practice - Metrics Phase-In for Cisco Shared Support

Purpose

The purpose of this operating practice is to explain how performance-driven discounts are phased-in and applied depending on the date a partner is activated into the Cisco Shared Support program.

Scope

This operating practice applies to:

• Integrators who have signed their Cisco Shared Support exhibit

Geographic Coverage

This policy applies to:

• LATAM countries – Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Puerto Rico & Caribbean, Uruguay, Venezuela)

Definition of Terms

Activation: The date from which a partner has the ability to order under the Cisco Shared Support program.

Operating Practice Statement

This operating practice has the following objectives:

- Ensure that metrics are measured for a period of at least six months before they are used to drive discount adjustments
- Align the discount adjustment schedules of all partners at the earliest date possible

There are multiple schedules of metrics phase-in depending upon when the partner activates onto the Cisco Shared Support program:

- Schedule 1 applies to partners in Growth Markets countries who activate on or before February 1, 2006
- Schedule 2 applies to partners in Growth Markets countries who activate after February 1, 2006, but before March 31, 2006

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Schedule 1

Schedule 1 applies to partners in Latin America and Caribbean who activate on or before February 1, 2006.

Partner Activated		Metrics Measured	Discount Adjusted	Metrics Measured	Discount Adjusted	Metrics Measured	Discount Adjusted
After	On or Before	Until		Until		Until	
August 1, 2005	March 31, 2006	July 31, 2006	October 1, 2006	July 31, 2007	October 1, 2007	July 31, 2008	October 1, 2008
Metrics Concerne	ed						
Post-sales Support Customer Satisfaction		Yes	Yes	Yes	Yes	Yes	Yes
Service Request Volume		Yes	Yes	Yes	Yes	Yes	Yes
RMA Volume		Yes	Yes	Yes	Yes	Yes	Yes
Conversion Rate		NA*	No	Yes	Yes	Yes	Yes
Renewal Rate		NA*	No	NA*	No	Yes	Yes

*NA = Not Available

Schedule 2

Schedule 2 applies to partners in Latin America and Caribbean who activate after February 1, 2006 but on or before March 31, 2006.

Partner Activated		Metrics Measured	Discount Adjusted	Metrics Measured	Discount Adjusted	Metrics Measured	Discount Adjusted
After	On or Before	Until		Until		Until	
Feb 1, 2006	March 31, 2006	August 1, 2006 - July 31, 2007	October 1, 2007	July 31, 2008	October 1, 2008	July 31, 2009	October 1, 2009
Metrics Co	Metrics Concerned						
Post-sales Support Customer Satisfaction		Yes	Yes	Yes	Yes	Yes	Yes
Service Request Volume		Yes	Yes	Yes	Yes	Yes	Yes
RMA Volume		Yes	Yes	Yes	Yes	Yes	Yes
Conversion Rate		NA*	No	Yes	Yes	Yes	Yes
Renewal Rate		NA*	No	NA*	No	Yes	Yes

*NA = Not Available

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Operating Practice – Multi-year Deals

Purpose

The purpose of this operating practice is to provide guidance on how multi-year discounts are applied for Cisco Shared Support and Cisco Brand Resale partners.

Scope

This operating practice applies to:

• Cisco Shared Support and Cisco Brand Resale for Technical Support Services (TSS) when partners purchase multi-year contracts and pay the total fee up front to Cisco

This operating practice does not apply to:

• Multi-year deals that Cisco Shared Support or Cisco Brand Resale for TSS partners do not pay for up front to Cisco

Geographic Coverage

This operating practice applies to:

• LATAM countries – Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, México, Nicaragua, Panamá, Paraguay, Perú, Puerto Rico & Caribbean, Uruguay, Venezuela

Operating Practice Statement

Additional discounts are available if a multi-year (2 or 3 year) deal is prepaid and Cisco has been engaged by the partner on that deal.

For pre-paid multi-year services:

- The partner provides a list of equipment to which discount applies
- The online ordering tools, IPC and SCC, automatically apply the additional discounts when contracts for 2 or 3 years are ordered
- The current Net Present Value Discount is 4% for 2 year deals (off total net price)
- The current Net Present Value Discount is 7% for 3 year deals (off total net price)

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Practical Example

For example, if a partner, whose Cisco Shared Support discount is 50% signs a 3 year deal with an end user and prepays the Cisco Shared Support fee to Cisco and the Cisco Customer Advocacy Finance policy at the time of ordering indicates that an additional 7% discount is applicable, they will benefit from an additional 7% discount on top of the existing Cisco Shared Support discount for that particular deal.

List price of service being ordered:	\$100.00 per year
Cisco Shared Support discount at time of placing order:	50%
Partner's net price:	\$50.00 per year
Additional discount for 3 year pre-paid deal:	7%
Net value of additional discount:	\$3.50 (7% of \$50)
Partner's net price with additional discount:	\$50.00 - \$3.50 = \$46.50
	per year
Total net price to partner for the pre-paid 3 year deal:	3 x \$46.50 = \$139.50

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Operating Practice - Co-Termination of Contracts

Purpose

When a partner purchases equipment on different dates for the same end user, this equipment is added as separate line items into the Cisco contracts related to that end user. These line items will have different start and end dates depending on when the equipment was shipped.

The purpose of this operating practice is to define how partners may co-terminate these contracts in order to synchronize their expiration date beyond the initial year of the product purchase.

Scope

This operating practice covers contracts under Cisco Shared Support and Cisco Brand Resale for Technical Support Services (TSS)

Geographic Coverage

- EMEA countries Austria, Belgium, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Slovakia, Slovenia, Spain, South Africa, Sweden, Switzerland, and United Kingdom
- Australia
- New Zealand
- Latin America Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Puerto Rico & Caribbean, Uruguay, Venezuela.

Definition of Terms

Service Contract Center (SCC): Cisco online contract management tool.

Co-termination: The practice of consolidating multiple contracts into a common end date to align the renewal of contracts for the same service levels to a common date..

Grace Period: 30 day period following product shipment.

Operating Practice Statement

Including the grace period of 30 days, the first year of contract duration (see First Year Contract duration in this document) at point of product shipment may be a minimum of 13 months. Coverage may be for greater than 13 months if the partner selects multi-year contracts at point of product purchase on a pre-paid basis.

When a partner makes multiple purchases for the same end user, each purchase will be added as separate line items in the partner's contract with Cisco for that end user. These line items will have different end dates (the date when service will expire) depending upon when the equipment is shipped from Cisco to the partner.

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Cisco recognizes the importance of providing partners with the capability of aligning the end dates in order to facilitate the renewal of contracts with their end users and has made this possible as follows:

- Contract line items may be contracted for any duration (minimum one month). Any renewals of less than one year are subject to an additional fee
- This enables different line items to be co-terminated

How are contracts renewed?

Partners renew contracts on-line using SCC as described in the Cisco Shared Support and Cisco Brand Resale for TSS User Guides.

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Practical Example

Here are two examples of how contract line items could be renewed:



Note: These examples use one year contracts for purposes of simplification. Co-termination may only be employed after the last expiration date of the contracts to be terminated.



Operating Practice - Sparing and Chassis adds

Purpose:

The purpose of this operating practice is to outline the sparing process for partner installed base as well as competitor installed base.

Scope:

This practice applies to:

- CSSP spares not installed in a SIS98 chassis
- CSSP spares installed in a SIS98 chassis
- CSSP contract spares and CSSP chassis adds
- Smartnet contract spares and chassis adds
- > Sparing activity regarding partner installed base and competitor installed base.

Geographic Coverage:

This operating practice applies to the LATAM theatre: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Puerto Rico & Caribbean, Uruguay, Venezuela.

Definition of terms:

NBD:	Next Business Day
SDS:	Same Day Ship
Spare:	Any module purchased separately from the original contract may be inserted into a chassis or remain uninstalled to be installed later
SSC:	Service Support Centre
SCC: SMARTnet:	Service Contract Center (Cisco on-line contract management tool) The brand name of a Cisco technical support services direct offering

Cisco Systems, Inc All contents are Copyright © 2004 Cisco Systems, Inc. All Rights Reserved. Important Notices and Privacy Statement. Page 79 of 89 Following are the steps involved in Sparing for various service types:

CSSP Spares not installed into a SIS98 chassis

- 1. Partner IB and Chargeable Service
 - A. Order Product spares on Ordering Tool
 - B. Add the appropriate CSSPD part
 - C. Indicate the End User contract number
 - D. Only SDS/NBD allowed.
- 2. Partner IB and 0\$ Service
 - A. Order Product spares on Ordering Tool
 - B. Contact your SSR with order information
 - C. Include End User Contract number
 - D. Only SDS/NBD allowed.
- 3. Competitor IB and Chargeable Service
 - A. Order Product Spares on Ordering Tool
 - B. Contact your SSR with order information
 - C. Include End User contract number.
 - D. Only SDS/NBD allowed.
- 4. Competitor IB and 0\$ Service
 - A. Order Product Spares on Ordering Tool
 - B. Contact your SSR with order information
 - C. Include End User contract number.
 - D. Only SDS/NBD allowed.

CSSP Spares installed in a SIS98 chassis

 Partner IB and Chargeable Service and for 0\$ Service Order Product Spares on Ordering Tool with NO service line. Contact your SSR with Order Information Include SIS Chassis serial number and SIS98 service contract number. CSSPD is the only service level allowed – SDS/NBD

2. Competitor IB: Adds to chassis are PROHIBITED unless the entire chassis and all associated cards a re acquired from incumbent partner. Manual process if acquired.

CSSP Contract Spares and CSSP Chassis Adds

- 1. Partner IB and Chargeable Service
 - A. Order Product spares on Ordering Tool
 - B. Add the appropriate CSSP part
 - C. Indicate the End User contract number.

2. Partner IB and 0\$ Service

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- A. Order Product spares on Ordering Tool.
- B. Use SCC to add the product spare to the appropriate End User include the contract number.

3. Competitor IB: Sparing is NOT recommended and adds to chassis are PROHIBITED unless the entire chassis and all associated cards are acquired from incumbent partner.

SNT Contract Spares and Chassis Adds

1. Partner IB and Chargeable Service

- A. Order Product spares on Ordering Tool and add the appropriate CSSP part.
- B. Indicate the End User contract number.

2. Partner IB and 0\$ Service

- A. Order Product spares on Ordering Tool.
- B. Use SCC to add the product spare to the appropriate End User contract number.

3. Competitor IB: Sparing is NOT recommended and adds to chassis are PROHIBITED unless the entire chassis and all associated cards are acquired from incumbent partner.

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Operating Practice – Take-over / Credit

Purpose:

The purpose of this operating practice is to define the rules surrounding take-overs and refunds.

Take-overs occur when end users make a value-based choice by purchasing service either directly from Cisco (SMARTnet) or from an authorized Cisco partner who did not supply the product. Cisco is implementing this operating practice to ensure that take-overs are handled consistently and efficiently.

Scope:

What the operating practice covers:

Take-overs that occur:

- Under Cisco Shared Support
- Under Cisco Brand Resale for Technical Support Services (TSS)

What the operating practice does not cover:

This practice does not apply to:

- Any take-overs that happen prior to partners migrating to Cisco Shared Support or Cisco Brand Resale for TSS
- Credits for take-overs of SIS98 installed base (even after migration of partner to Cisco Shared Support) as they follow the existing standard policy:
 - o 100% credit in 1st year, 60% credit in 2nd year, no credit in 3rd year and for Category A

Geographic Coverage:

This operating practice applies to the LATAM theatre: (Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Puerto Rico & Caribbean, Uruguay, Venezuela).

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Definition of terms:

Grace Period:	30 day period following product shipment
Credit:	Issuance of a credit for service fees paid under appropriate program
Established Arrangements:	This occurs when the customer has clearly stated in advance of product
-	purchase that support will be supplied directly by Cisco (procured as
	SMARTnet or Cisco Brand Resale for TSS).
New partner:	Partner who acquires the responsibility to support the equipment not originally
	sold to the end user and pays the applicable support fees
Original partner:	Partner who originally sold the equipment to end user and/or previously
	owned the responsibility to support the equipment and has paid the applicable
	support fees to Cisco
SCC:	Service Contract Center (Cisco on-line contract management tool)
SMARTnet:	The brand name of a Cisco technical support services direct offering
Take-over:	When responsibility for support is transferred from one partner to another
	(under Cisco Shared Support or Cisco Brand Resale) or to Cisco

Take-overs Operating Practice Statement

Following are the steps that occur in a take-over:

- 1. End user indicates that the products purchased will be supported by a new partner (or Cisco) in place of the original partner. It is the responsibility of the new partner to ensure that Cisco receives this notification from the end-user. However, either the new partner or the original partner can provide this notification as long as Cisco is notified.
- 2. Within 90 days of the end user advising Cisco of their decision, the original partner declares to Cisco the installed base devices they will no longer be supporting and requests the applicable credit.
- 3. Cisco provides a quote to the new partner for support of these items. If no installed base has been declared within 90 days then Cisco will identify the relevant installed base and use this for the purposes of developing the quote.
- 4. New partner places purchase order for applicable service fees against the quote provided by Cisco.
- 5. Cisco refunds the original partner the applicable credit.

0r

If end user elects to be supported directly by Cisco: Cisco obtains purchase order from new partner for SMARTnet (for Cisco Brand Resale) to be provided on installed base declared by original partner.

- 6. Cisco credits original partner as applicable.
- 7. Cisco cancels contract(s) for this equipment set up for original partner, creates new contracts for new partner and moves the equipment to the new contract.

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How original partner declares the installed base they will no longer support:

- Original partner provides Cisco with written proof of the take-over from either the end user or the new partner.
- Original partner provides notification to Cisco including the contract number, Product ID, serial number, date of takeover, the name of the partner who is taking over the contract, and a letter from the End-user stating that they are requesting the contract to be taken over by a new partner.

How new partner activates service on the installed base they are taking over:

- New partner provides Cisco with the list of devices and site IDs of the equipment to be supported and indicates the service level(s), contract duration required, and end-user information.
- The contract duration cannot be for less than 12 months
- Cisco creates a quote in SCC based on the information supplied by new partner
- New partner places purchase order in SCC
- Cisco sets up new contracts and activates service

Note: In accordance with the Other Products Clause (OPC), the partner taking over the business will be subject to an administration charge up to 10% of the annual support fee for the affected equipment

Credits Issued to Original Partner

Under Cisco Shared Support, credits apply only for the first year following product shipment. No credits will be issued subsequent to this period.

If there is not an Established Arrangement then for take-overs during the grace period or subsequent 90 days partners receive a 100% credit.

Thereafter (i.e. after 90 days have elapsed from the end of the grace period) credits are allocated on a prorated daily basis starting from the end of the grace period and calculated as follows: (original purchase price of service)*(1-(days post grace period - 90) / 275 days))

Practical Example

- Original partner purchases Shared Support contract from Cisco for \$100.
- There is a takeover 180 days after the end of the Grace Period.
- Refund due is (\$100)*(1-(180-90)/275)) = \$67

Cisco Systems, Inc All contents are Copyright © 2004 Cisco Systems, Inc. All Rights Reserved. Important Notices and Privacy Statement. Page 84 of 89 If there is an Established Arrangement then the fees are cancelled (and no service entitled) until the service purchase order is received by Cisco. However, should the service purchase order not be received within 120 days of product shipment date then the original partner will be invoiced for the outstanding fees.

Take-overs of Cisco Brand Resale Contracts

If an end user decides to renew a Cisco Brand Resale contract with a new partner rather than the original partner the following occurs:

- New partner requests support quote from Cisco while providing the list of equipment, locations and service level(s) required
- Cisco places relevant quote in SCC for partner
- New partner places purchase order in SCC

No credits are applicable.

Impact of take-overs on Cisco Shared Support and Cisco Brand Resale Performance Metrics

The installed base no longer covered by the original partner is transferred to the new partner for purposes of metrics calculations.

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Operating Practice - Shared Support Integrators Out-Tasking Support Activities

Purpose:

An integrator must meet defined eligibility criteria in order to enter and remain in the Cisco Shared Support program. Some of the criteria relate to the integrator's service infrastructure and capability.

Cisco will accept that an integrator may out-source certain support tasks provided that the integrator meets the overall eligibility criteria at all times. It is the responsibility of the Integrator to monitor the quality of service provided by any "out-tasker" on their behalf.

Scope:

Applies to integrators Out-Tasking their support activities

Geographic Coverage:

This operating practice applies to the LATAM theatre:

Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Puerto Rico & Caribbean, Uruguay, Venezuela.

Systems Access

The Cisco Shared Support program requires that contracts be managed on a per end user basis for each integrator. This "Service Agreement Framework" is described in detail in the Cisco Shared Support User Guide.

To adhere to the Service Agreement Framework, partners who want to involve out-taskers should be aware that in order for the out-taskers to request service and manage contracts (on behalf of the integrator) it will be necessary for:

- Integrators to request Cisco access for out-taskers
- Out-taskers will have visibility and access to ALL integrator contracts it will not be possible to provide selective access to out-taskers which also applies to use of the SVO Submit Tool and Service Contract Center (SCC)

The integrator must identify an administrator who will be the SOLE person from whom Cisco will accept requests to provide access to out-taskers in addition to changes to the identity of any out-taskers. These requests must be made using the template below.

Metrics

Integrators who choose to work with out-taskers must accept the following in relation to their Cisco Shared Support performance metrics:

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- Out-taskers must open TAC or RMA requests on the appropriate integrator's contracts
- All cases opened by out-taskers will be counted in the metrics measurements (in addition to requests opened directly by the integrator)
- The out-taskers activity on the integrator's contracts will directly impact the integrator's Cisco Shared Support discount
- Customer satisfaction will be measured on the integrator's end users only

Cisco will require that the integrator's contract include a clause whereby the integrator accepts that requests opened by out-taskers will be included in the metrics measurements that drive the integrator's discounts.

Serial Number Management

Under the Service Agreement Framework, it is required that when Moves, Adds or Changes are made, the related serial numbers are updated by the integrator in Service Contract Center to ensure data accuracy at all times.

It will be required that out-taskers who manage inventory or handle spares replacement activities for integrators must ensure that contract data is accurate at all times. This will require identification of spare parts separately for each integrator they work with.

Template to be sent by the integrator's administrator requesting access to be given to an out-tasker.

The following text must be used by the nominated administrator when an integrator is requesting that Cisco provide access to the out-tasker (Service Only Partner) to whom they have decided to out-task components of their service delivery.

I (name) an officer or official of (Integrator) with authority to bind (Integrator) in all respects, request Cisco Systems, Inc. and/or its subsidiaries to provide access to the service contracts of (Integrator) in the Cisco systems (SCC, SVO submit, COT) for the following individual(s) who are employed by (Sub-contractor) to whom we are out-tasking:

First name Last name Email Address Company

I am fully aware that, as a consequence of this request:

 These individuals will have access to ALL details of ALL the support contracts Integrator has with Cisco and that Cisco has no control over the way in which such individuals may use or further disclose such details nor shall Cisco be liable for any losses, damages or claims made as a result of such individuals access to and/or disclosure of such details.

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- CISCO SYSTEMS
 - The TAC and RMA cases opened by these individuals on the Integrator's contracts will be included in the metrics calculation that will drive Integrator's discount

Signed:

For and on behalf of (Integrator)

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Acronyms

CARE - Customer Advocacy Response CCO - - Cisco Connection Online (external website) CSAM - Channel Service Account Manager DOA - Dead on Arrival (parts) EOL - End of Life ERP – Enterprise Resource Planning GCC – Global Call Center GPL - Global Product List Price GPS – Global Product Services GSM - Global Service Manager HW - Hardware IPC - Internet Product Center IC - Internet Commerce LATAM - Latin America NBD - Next Business Day Shipment NPV - Net Present Value PICA - Partner Initiated Customer Access PMC – Performance Metrics Central POS – Point of Sale PRA – Partner Readiness Assessment RMA - Return Material Authorization SAM – Service Account Manager SAS - Software Application Support SASU - Software Application Support plus Upgrades SBDM - Service Business Development Managers SCC – Service Contract Center SDS – Same Day Shipment SSP - Software Subscription Program SVO - Service Ordering Tool TAC - Technical Assistance Center VAD - Value Added Distributor

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