Cisco Sales Collaboration Platform

PARTNER USER GUIDE - MARCH 2013
NORTH AMERICA, LATIN AMERICA, CANADA

Accelerating Opportunities Through Collaboration

"Collaboration is in our DNA at Cisco. With the Sales Collaboration Platform, we have a great way to collaborate with our partners to accelerate growth."

Andrew Sage
Vice President, Worldwide Partner Led Sales

The Cisco Sales Collaboration Platform is a new way for Cisco to work closely with our partners to accelerate growth by sharing leads, prospects, and *customer intelligence with partner sales teams.

Continuing its global roll-out during 2013, the Platform integrates with Cisco Commerce Workspace (CCW) and is designed to accelerate the focus on key sales opportunities through early account engagement with Cisco sales and use of *customer intelligence.

A key enabler of our Partner Led go-to-market strategy, the Platform will become foundational in support of our profitable partnership. Please use it to collaborate with us on sales opportunities.

*Where available

Benefitting Your Business

Collaborate with Cisco early in the sales process to drive incremental revenue through your pipeline.

A consolidated view of Cisco opportunities, with Customer Intelligence (CI), where available, can enable more effective sales planning and execution, and may help reduce time-wasting channel conflicts on deals.

Target Prospect Engagement

- Focus on high-potential accounts

Early Visibility of Opportunities

- Engage with accounts earlier

Customer Intelligence (Where Available)

- Increase win rate, expand deal size, reduce cost of sale

Lead and Prospect Management

- Improve business visibility

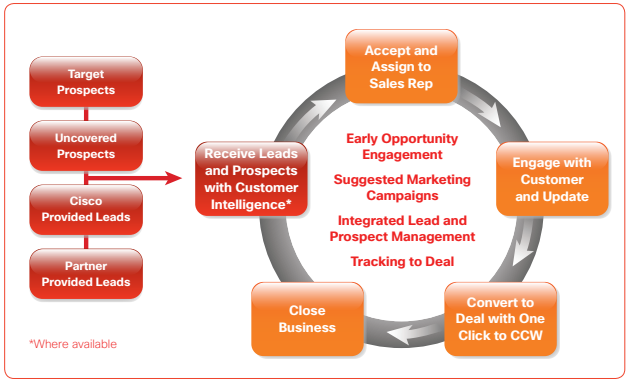
Joint Progress Tracking

- Improve sales planning and resource management

Integration with Cisco Commerce Workspace (CCW)

- Use one click to CCW, and more easily enter a deal and register for incentive programs.

Figure 1. Cisco and Partner Collaboration in the Sales Process



Sales Collaboration Platform: SCP Mobile

And now the Platform has gone mobile. SCP Mobile is an extension of your desktop, enabling you to get closer to prospects and leads with powerful mobile features such as GPS maps, automatic updates, and favorites. See page 22.

Learn More and Access Training

Visit Sales Collaboration Platform or speak to your Cisco sales contact.

Onboarding

The Cisco Sales Collaboration Platform is designed to support your working relationship with Cisco, so your usual Cisco sales contact will support you through the onboarding process.

Introduction Session

- Find out how the Platform can benefit your business

Identify your Users

- Enroll your company and enroll your salespeople

Training Session

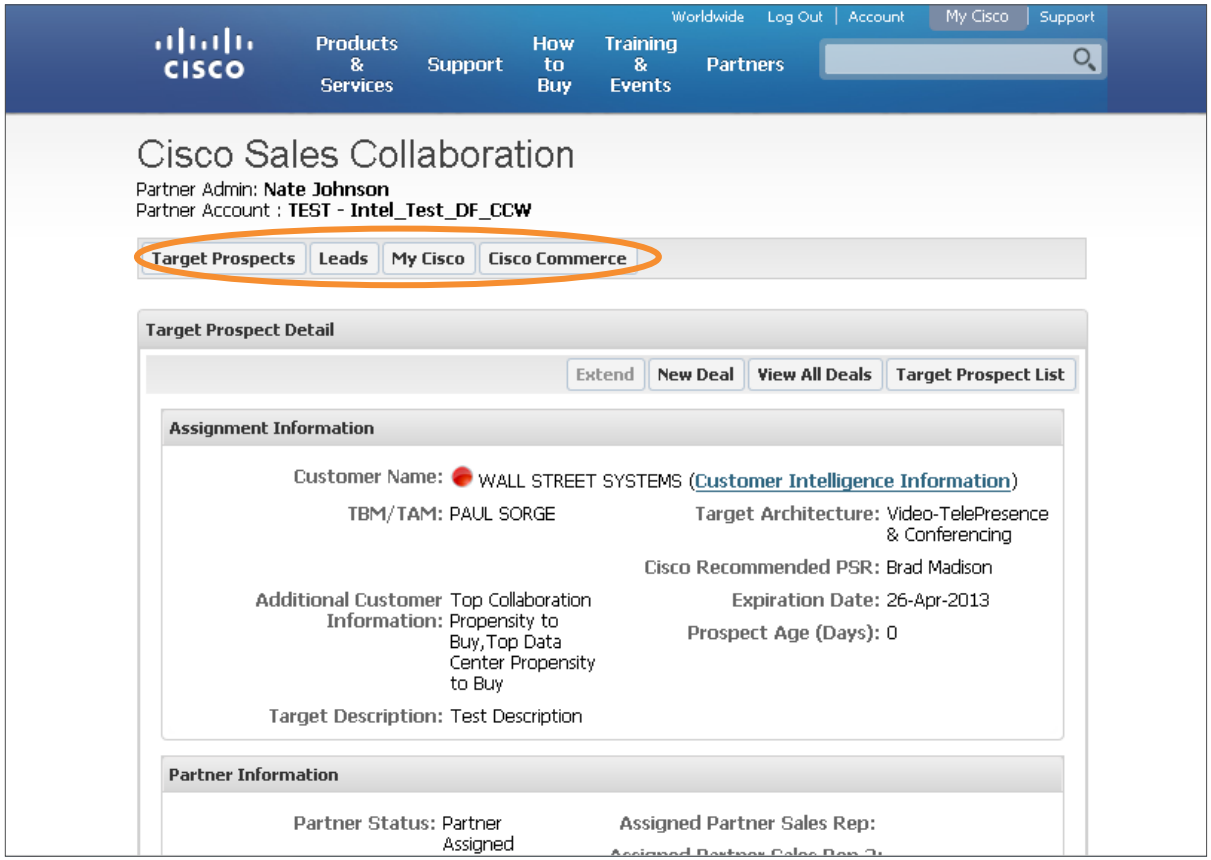
- View training modules with your Cisco sales contact

Start Collaborating Session

- Review Target Prospects and Leads (when available)

Ongoing Collaboration

- Continue to work closely with your Cisco sales contact for support with Prospects and Leads
- Add Notes, Attachments, and Tasks to the Platform, for ongoing tracking



Enrollment Overview

To obtain access to the Sales Collaboration Platform partner companies must be enrolled and identify the sales individuals who will require access to the system.

Partners Have Two User Types

The Sales Collaboration Partner Admin (PA) is the person identified to enroll the partner company in the Sales Collaboration Platform and grants access to other employees/contacts. They could be a Sales Manager, Sales Rep, or Sales Administrator and are responsible for accepting/rejecting, and assigning leads and target prospects to Partner Sales Reps (PSRs). The Partner Admin can also perform the functions of the Partner Sales Rep. A partner can have several PAs.

The Sales Collaboration Partner Sales Reps (PSRs) are salespeople at the partner company. They accept/reject, update and convert leads and target prospects in the Sales Collaboration Platform, collaborate on opportunities with their Cisco Sales contact and enter deals in CCW.

Once enrolled, all users can add the Platform to My Cisco Workspace for easy access through that tool.

Partner Admins From Partner Plus Partners

If your company has completed enrollment in the Partner Plus program, your company should already be enrolled to the Sales Collaboration Platform.

You will have received an email confirming this. It provides a link and instructions to enable you to assign individuals in your company to the role of Partner Sales Rep (PSR) and/or Partner Admin (PA), for the Platform.

For these instructions, go to Partner Admin and see under Assign Your Salespeople to the Platform.

Partner Admins From Non Partner Plus Partners

Please go to Partner Admin and follow the enrollment instructions to first enroll your company and then your company's sales individuals.

Partner Sales Reps (PSRs) From All Partners

As a PSR, you will receive a welcome email with a link and instructions on how to access the Sales Collaboration Platform. (Note: It can take 14-36 hours after assignment by the Partner Admin (PA), for access to the Platform to be available.)

If you have not received this email, or are having trouble accessing the Platform, please contact your Sales Collaboration Partner Admin (PA) first to ensure they have assigned you to the PSR role. If you are still having problems, please speak to your Cisco sales contact or the Partner Relationship Team (PRT).

Problems enrolling?

Please speak to your Cisco sales contact or go to the Partner Relationship Team (PRT).

Sales Collaboration Partner Admin Role

Enroll Your Company in the Sales Collaboration Platform

1. You will need your valid Cisco.com ID
2. Go to the Partner Program Enrollment (PPE) tool
3. At the Eligible Programs tab, expand the Profitability and Practices section
4. Locate the Cisco Sales Collaboration Platform program and click Select
5. Validate your information
6. Select Save and Continue
7. Review Terms and Conditions and click the check box to approve
8. Click Continue
9. Click Submit Request

To view the screenshots that accompany these instructions, please go to Screenshots.

Assign Your Salespeople to the Platform

You will receive an email containing a link to enroll sales individuals to the role of Partner Sales Rep (PSR) using the Partner Self-Service (PSS) tool.

1. Go to Partner Self-Service (PSS)
2. Under Choose a Task select the drop-down menu for Update Company Contacts Access
3. On the Company Access tab, at Search For An Individual, enter search criteria for an employee (i.e. Cisco.com ID, email address, name) and click Search
4. You may also click on the View All Contact Access link at the top of the tab to view all employees/contacts
5. Select the desired employee/contact and click Edit
6. Check the box to grant the desired level of access to the employee:
   - **Sales individual:** Select Sales Collaboration Partner Sales Rep
   - **Partner administrator:** Select Sales Collaboration Partner Admin *and* Partner Sales Rep
7. Click Next
8. Click Submit and repeat the above steps to grant access to additional employees if desired

If an individual is not listed, and if you have permission, enter that person's information into the Partner Self-Service (PSS) system following the standard procedures. You can also contact the administrator for your Cisco partnership to add new contacts.

A welcome email will be sent to each enrolled individual with a link and instructions for accessing the Sales Collaboration Platform. (Note: It can take 14-36 hours after assignment by the Partner Admin (PA), for access to the Platform to be available.)

Problems enrolling?

Please speak to your Cisco sales contact or go to the Partner Relationship Team (PRT).

Enrolling Your Company in the Platform

1. You will need your valid Cisco.com ID
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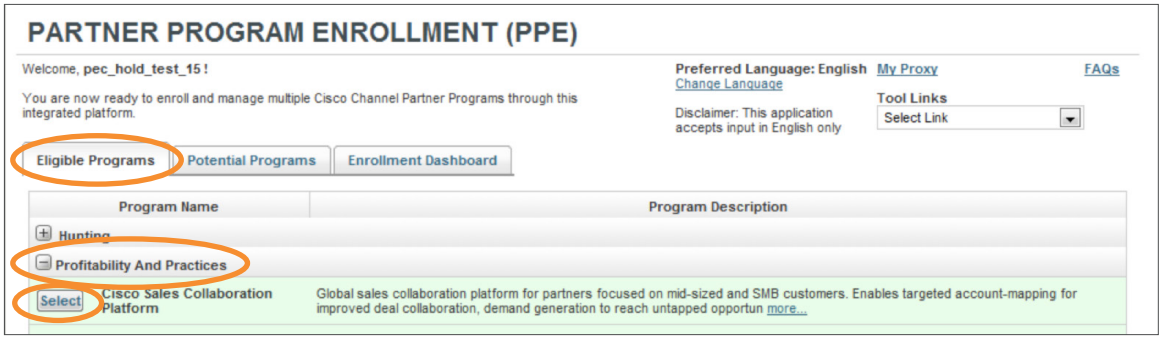

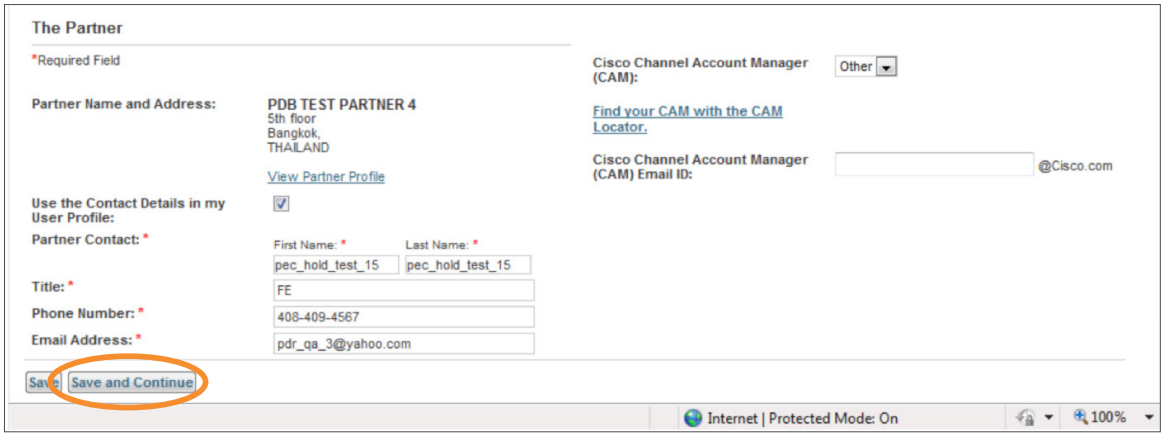

Assigning Your Salespeople to the Platform

1. Go to Partner Self-Service (PSS)
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3. On the Company Access tab, at Search For An Individual, enter search criteria for an employee (i.e. Cisco.com ID, email address, name) and click Search
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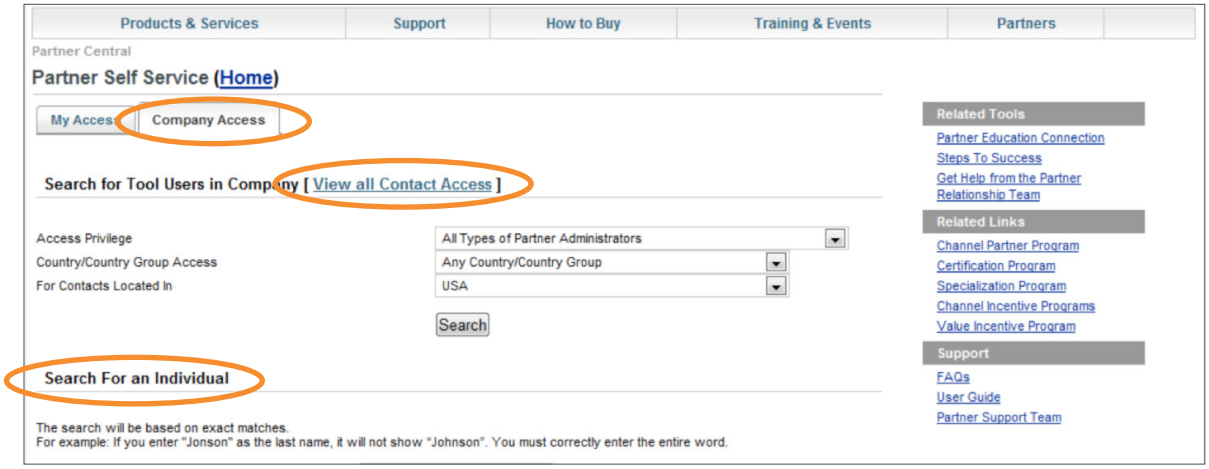
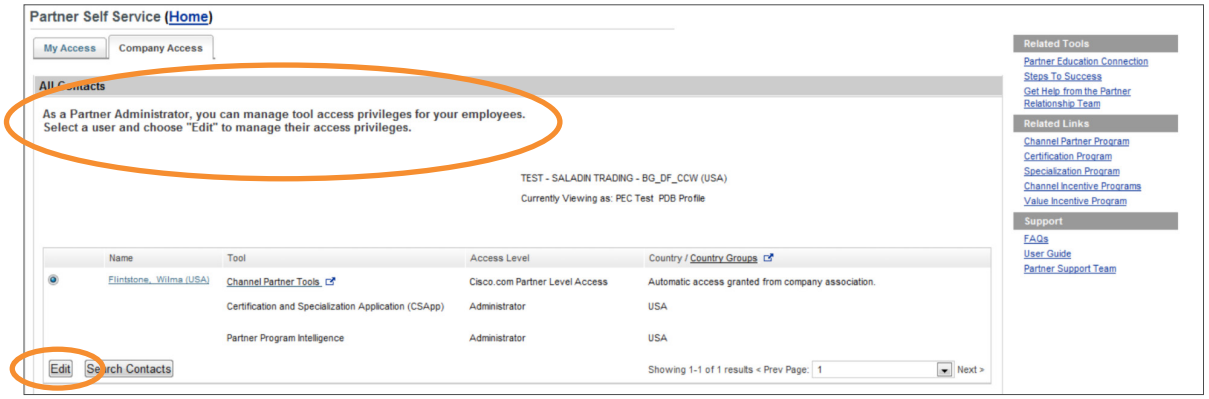


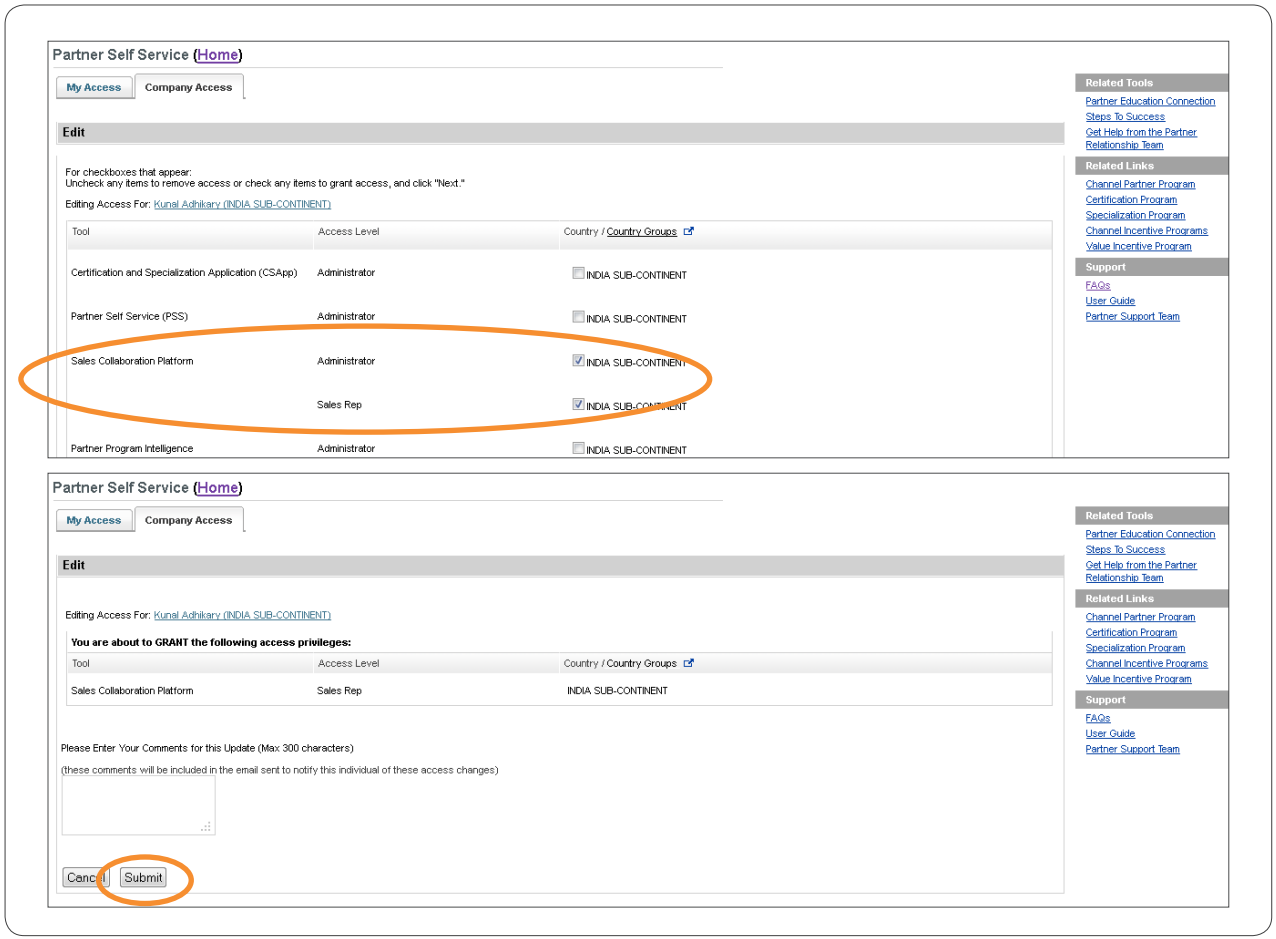


Assigning Your Salespeople to the Platform

6. Check the box to grant the desired level of access to the employee:
   - **Sales individual:** Select Sales Collaboration Partner Sales Rep
   - **Partner administrator:** Select Sales Collaboration Partner Admin *and* Partner Sales Rep
7. Click Next
8. Click Submit and repeat the above steps to grant access to additional employees

If an individual is not listed, and if you have permission, enter that person's information into the Partner Self Service (PSS) system following the standard procedures. You can also contact the administrator for your Cisco partnership to add new contacts.

A welcome email will be sent to each enrolled individual with a link and instructions for accessing the Sales Collaboration Platform. (Note: It can take 14-36 hours after assignment by the Partner Admin (PA), for access to the Platform to be available.)

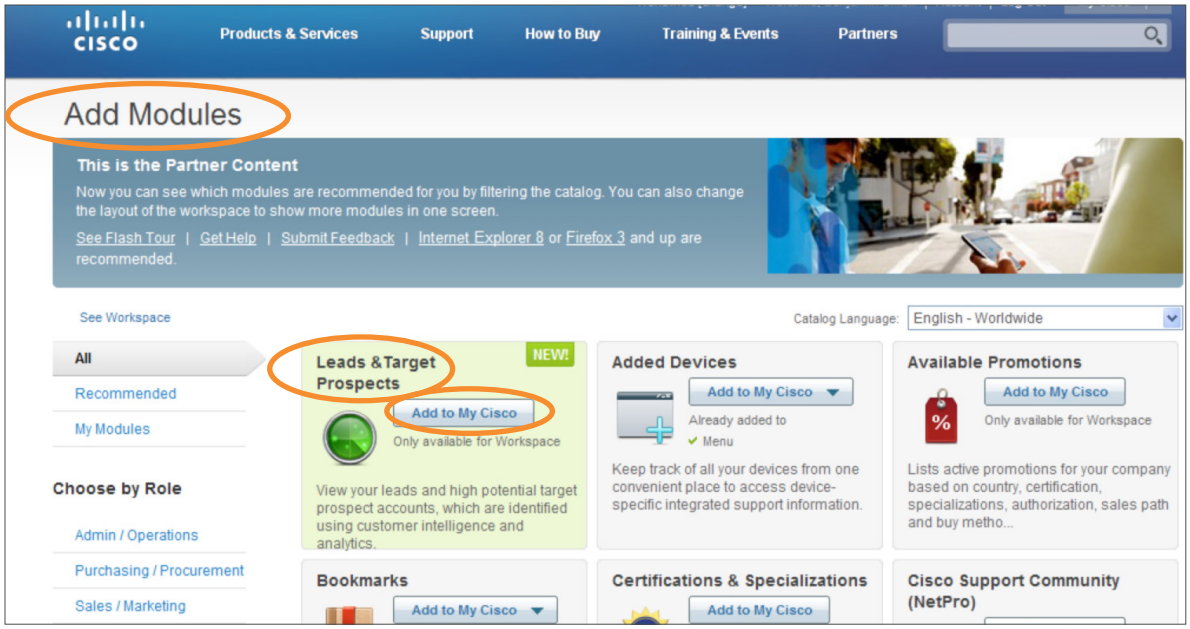


All Users: Add to My Cisco Workspace

Once enrolled, you can add the Platform to your My Cisco Workspace for easy access and viewing through that tool.

1. Go to My Cisco Workspace
2. Go to the Add Modules page and select the Leads & Target Prospects module
3. Click Add to My Cisco
4. Click See Workspace

Note: It can take up to 36 hours between completing enrollment and being able to view the Platform through My Cisco Workspace.



Browser Compatibility

The Cisco Sales Collaboration Platform, My Cisco Workspace and Cisco Commerce Workspace (CCW) are best experienced using IE8 or the latest version of Firefox.

For instructions on how to receive, view, assign, and work with Target Prospects, Leads, and Uncovered Prospects through to Deal in Cisco Commerce Workspace (CCW) go to Using The Platform.

Target Prospects

A Target Prospect is a company/account that, based on intelligence and analytics, has a high potential to generate sales opportunities for one or more technologies or solutions.

Cisco will upload to the Platform details on high-potential accounts, with Customer Intelligence (CI) where available. Potential primary customer opportunities are identified based on an analysis of installed base data and intelligent predictive models.

Customer Intelligence availability varies by region. Please contact your Cisco sales representative for details.

After viewing the Target Prospect and CI, your Sales Collaboration Partner Admin (PA) accepts and assigns the Prospect to a Partner Sales Rep (PSR). The PSR engages with the customer, identifying potential sales opportunities, with the support of the Cisco sales team. By updating the Platform with information about the sales engagement, we have joint tracking and visibility during the sales cycle.

*Where available

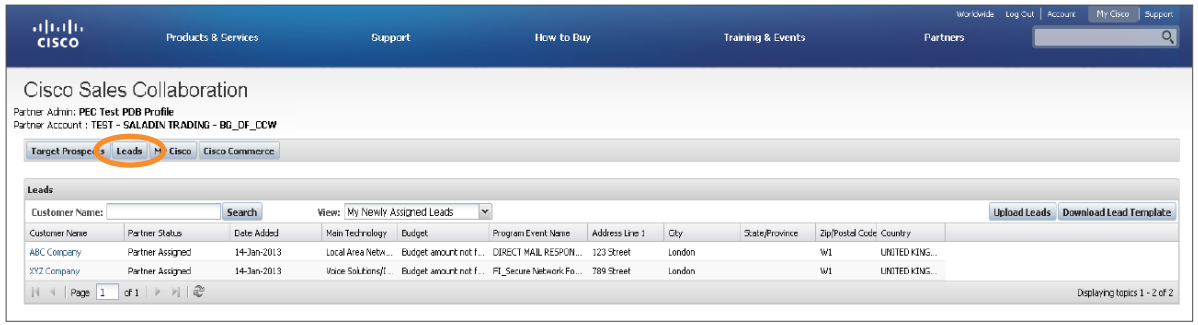
The process to create a deal is simplified, with one click to Cisco Commerce Workspace (CCW) that pre-populates the new Deal with the data captured so far. The PSR then proceeds to booking in CCW in the usual way, including registering for incentives programs such as the Opportunity Incentive Program (OIP), Solution Incentive Program (SIP), and Teaming Incentive Program (TIP).

For instructions on how to receive, view, assign, and work with Target Prospects, Leads, and Uncovered Prospects through to Deal in Cisco Commerce Workspace (CCW) go to Using The Platform.

Leads

A (BANT) Lead is a company/account that has expressed an interest in a Cisco solution, and that is qualified by Cisco, a vendor, or a partner to have budget, need, and timeline.

Where available in your region, Cisco will upload Leads to the Platform for you to accept and assign to a Partner Sales Rep (PSR) in the same way as for Target Prospects.



Lead Categories: Definitions

Cisco Leads will be categorized to help with prioritization and to identify what action is needed.

BANT Criteria

- BANT refers to the key lead-qualification criteria: Budget, Authority, Need, Timeframe.

Appointments

- Appointment leads are from joint programs between Cisco and a Partner where the call center is arranging an appointment for a partner. These will include all BANT and appointment details such as proposed dates and types of appointment.

Quote Request

- Leads in which the customer or contact has requested a quote from Cisco or a partner. The call center will attempt to collect the project technology and timeframe prior to passing a Lead to sales.

Demo or Trial

- These Leads will include any demo or trial requests received through the call center. The call center will attempt to collect the project technology and timeframe prior to passing the Lead to sales.

Attendees

- Contacts who have attended an event where the partner or sales person has agreed to follow up. These may or may not include the BANT questions depending on the data collected at the event.

Cisco Leads may also have Customer Intelligence, where available, attached to them. This varies by region so please check with your Cisco sales contact.

The process for managing Leads on the Platform is similar to that for Target Prospects.

You (or your vendor) can also upload leads to the Platform, to better collaborate with your Cisco sales contact. For co-marketing demand generation campaigns, this will facilitate reporting and tracking the ROI.

For instructions on how to receive, view, assign, and work with Target Prospects, Leads, and Uncovered Prospects through to Deal in Cisco Commerce Workspace (CCW) go to Using The Platform.

Uncovered Prospects

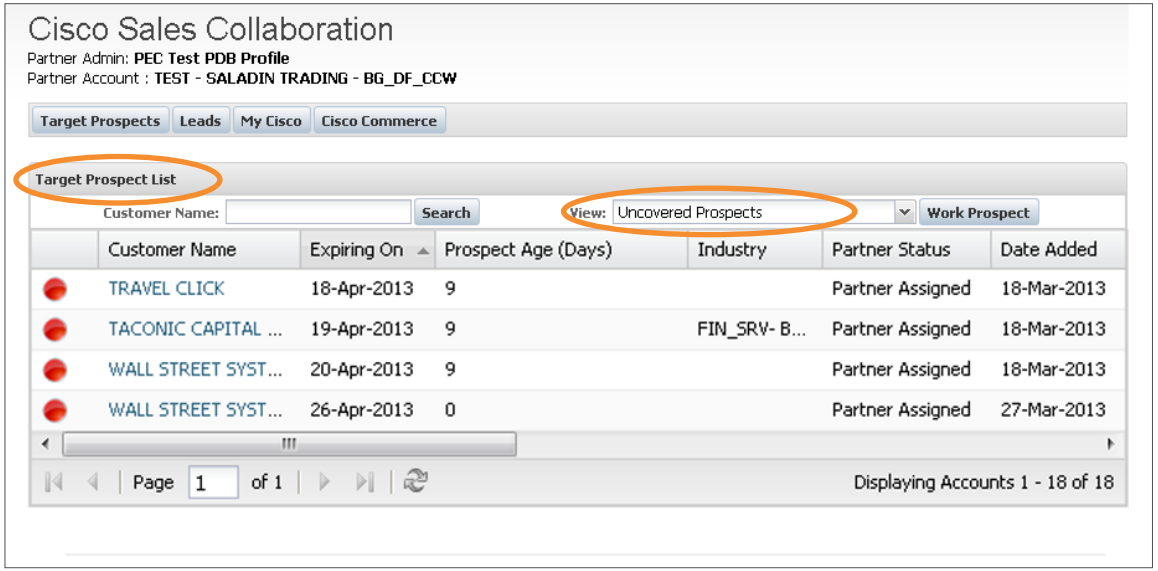
An Uncovered Prospect is a company/account that, based on intelligence and analytics, has little or no Cisco purchase history but has potential for a specific technology or solution.

Uncovered Prospects will be shared with our channel partners through the Sales Collaboration Platform, providing incremental new business opportunities.

The process varies by region, so please check with your Cisco sales contact.

Cisco will also suggest marketing campaigns that would be suitable for addressing these Uncovered Prospects, including links to the marketing materials for you to use.

The process is then similar to that for Target Prospects and Leads.



For instructions on how to receive, view, assign, and work with Target Prospects, Leads, and Uncovered Prospects through to Deal in Cisco Commerce Workspace (CCW) go to Using The Platform.

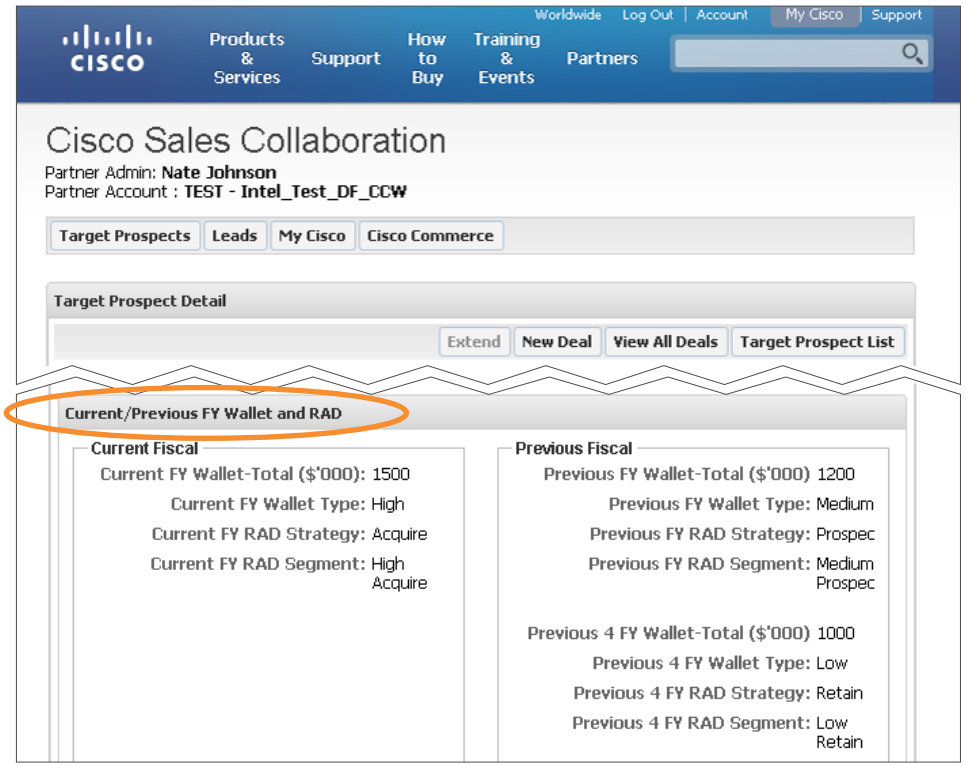
Customer Intelligence (CI) (Where Available)

Customer information based on an analysis of installed base data and intelligent predictive models. It includes for each Cisco technology, the company/account's: (1) estimated wallet size – potential technology spend, (2) the prospect's propensity to buy technologies or solutions, and (3) sales alerts with related marketing campaigns.

1. Estimated wallet size – potential technology spend
   Uses the Cisco analytical model to predict the wallet size of an account in a given timeframe. Use this CI to gain an overall understanding of the size of the account, and to help plan and prioritize how best to engage with an account.

   Companies/accounts are categorized as follows:

   - Wallet Type - value as estimated by Cisco: Small/Medium/Large or Low/Med/High (terminology varies by Region)
   - RAD Strategy - sales approach based on Cisco's wallet-share*: Retain, Acquire, Develop
     - Retain = greater than 50% wallet share.
     - Acquire = less than 10% wallet share.
     - Develop = 10-50% wallet share.
     - Prospect = 0% wallet-share.



- RAD Segment is the result based on the Wallet type and RAD Strategy, e.g. High Prospect, Medium Retain

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2. Propensity to buy

Based on the Cisco award-winning propensity to buy model, the probability that the prospect will purchase a given technology in the next six months.

Use wallet size and propensity to buy in combination to prioritize engagements within an account.

- E.g. Is a $500,000 wallet size with a 10% probability of purchase more or less interesting than a $100,000 wallet size with a 90% probability of purchase?

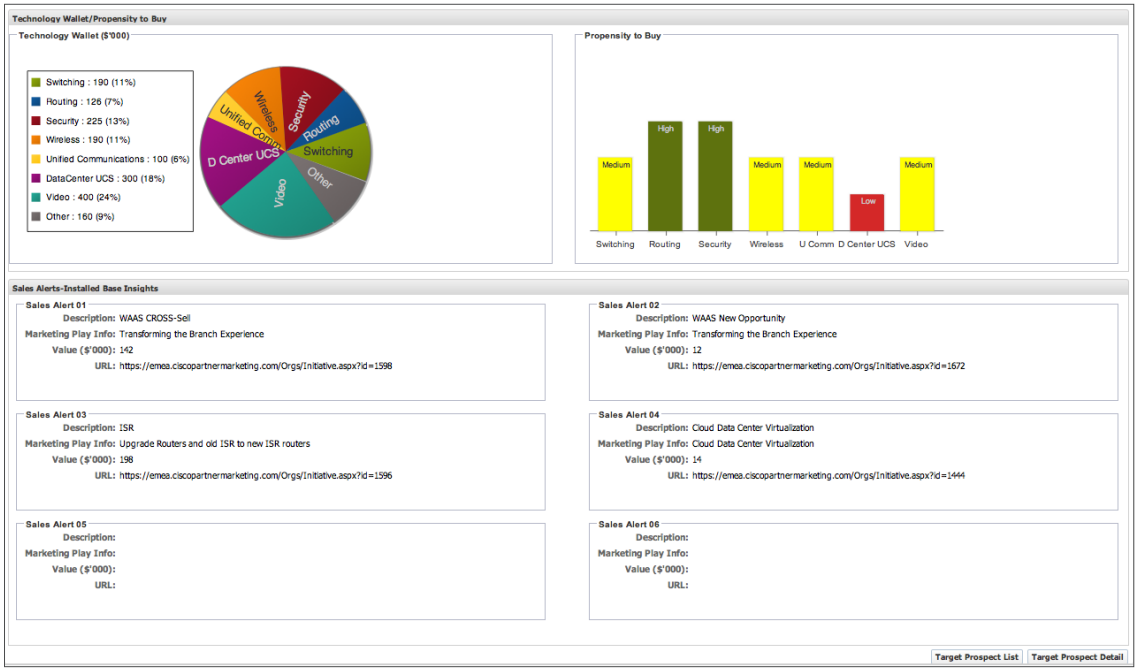
3. Sales alerts with related marketing campaigns

These are business-logic rules analyzed over bookings data to identify potential opportunities within an account for end-of-life, end-of-support, cross-sell, upsell, and migration opportunities.

Use in conjunction with the assigned marketing plays to increase your relevance to the market and partners.

The alerts comprise:

- Description (e.g.,Cisco PIX® to Adaptive Security Appliance [ASA] migration)
- Value of opportunity
- Marketing play name (suggested Cisco co-marketing campaign)
- Links to access campaign descriptions and materials



Where available, Customer Intelligence will be attached to Target Prospects, Uncovered Prospects, and Leads supplied to you through the Platform. Availability varies by region. Please ask your Cisco sales contact.

For instructions on how to receive, view, assign, and work with Target Prospects, Leads, and Uncovered Prospects through to Deal in Cisco Commerce Workspace (CCW) go to Using The Platform.

Partner Admin Responsibilities

Receive Leads and Target Prospects

Cisco will assign Leads and Target Prospects to your business. Keep in touch with your Cisco sales contact about what is being assigned to your company.

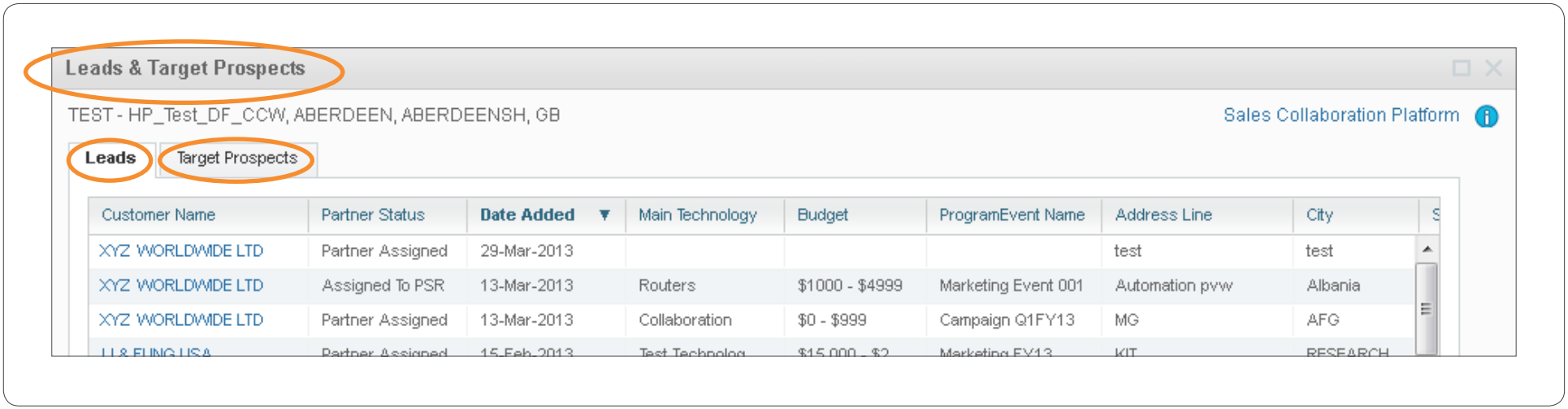
The Partner Admin (PA) either accepts and assigns the account to a Partner Sales Rep (PSR) or rejects it.

For best practice, this is done within 48 hours.

- Go to the Sales Collaboration Platform either from My Cisco Workspace* or from Cisco Commerce Workspace (CCW).
- A list of Leads and Target Prospects assigned to your company can be seen under the corresponding Leads or Target Prospects tab.
- To view or update a specific Lead or Target Prospect (including rating the quality of a Lead) select it from the list.

* If using My Cisco Workspace, you must first have added the Leads & Target Prospects module. See page 9.

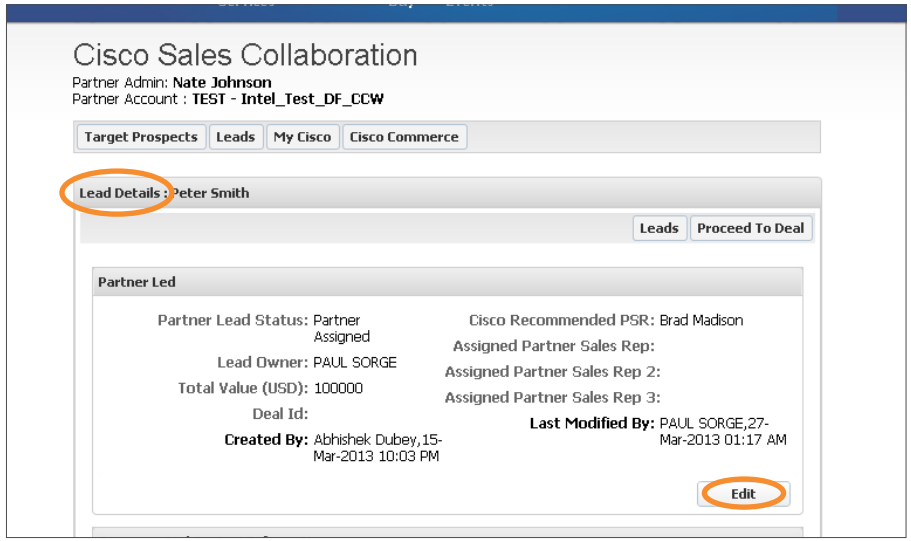
- Target Prospects contain a deadline date by which you will need to take action.
- You will see the expiry date and "age" of the prospect clearly noted, and those expiring within the next 7 days will be highlighted in red.
- You can invoke an automatic extension of 30 days (once only).
- The expiry date is extended by 60 days when the prospect is converted to a new deal.

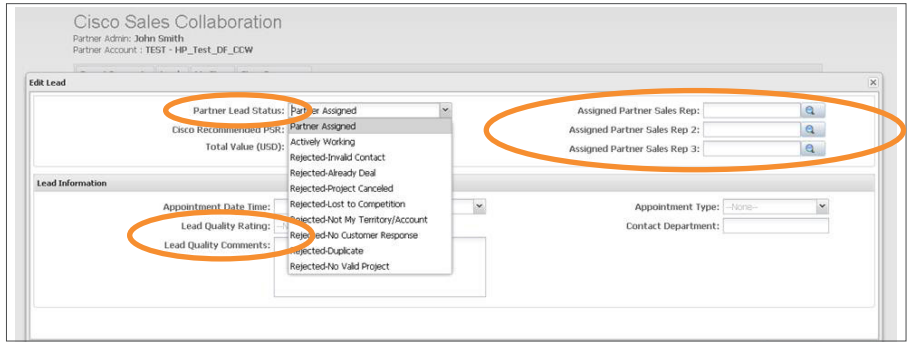


Partner Admin Responsibilities

Accept and Assign, or Reject Leads and Target Prospects

1. Click on the Lead or Prospect to open and review the details provided by Cisco.
2. To change, accept and assign, or reject the Lead or Prospect, select **Edit**.
3. To proceed, go to **Assigned Partner Sales Rep** and assign a Partner Sales Rep's name. (If you do not see the PSR listed, see Enrollment Instructions to Assign Your Salespeople to the Platform.)
4. You should now see the Sales Rep's name assigned to that Prospect or Lead.
5. Or, if you will be acting as the Partner Sales Rep yourself, simply change the status from **Partner Assigned** to **Actively Working**. The Prospect or Lead is now assigned to you.
6. To reject a Lead or Prospect, change the **Partner Status** to **reject** with one of the **rejection reasons** given
7. For Prospects, provide additional details on the rejection reason. For Leads, please leave a **Lead Quality Rating** and **Comment**.
8. The details of the Prospect or Lead will no longer be visible to you.





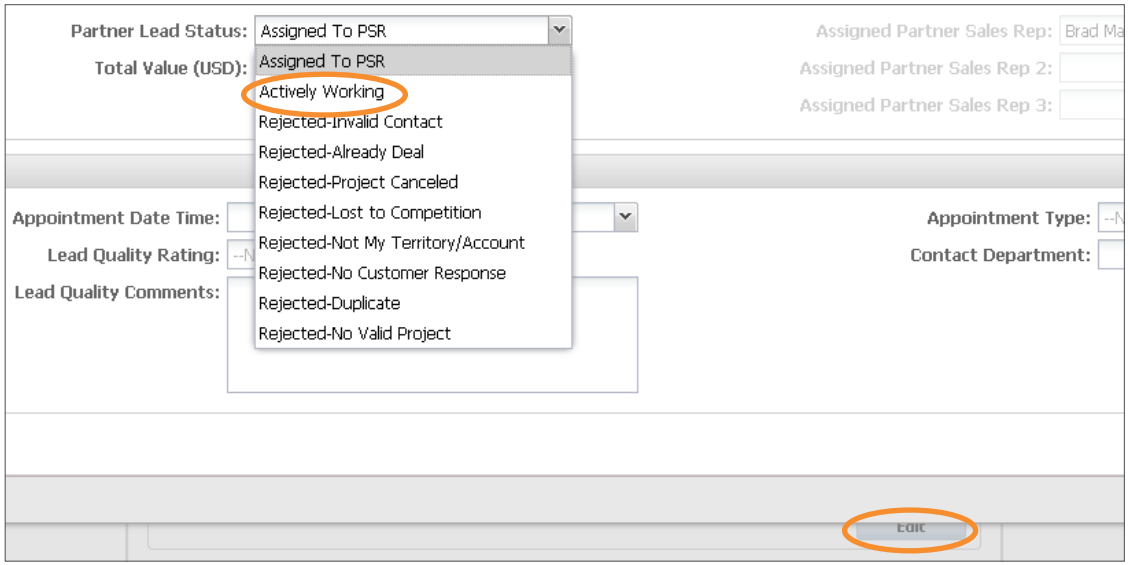
Partner Sales Rep Responsibilities

View, track, and work assigned Leads and Prospects through the sales cycle, adding notes and attachments throughout the process. Update the status as the Lead or Prospect progresses through the sales cycle from Actively Working to Closed.

View Leads and Target Prospects

- Go to the Sales Collaboration Platform either from My Cisco Workspace* or from Cisco Commerce Workspace (CCW).
- Go to the Leads & Target Prospects module and view new and existing Leads and Target Prospects under the corresponding tab
- Keep in touch with your Cisco relationship contact about what is being assigned to your company
- Your Leads and Prospects will be immediately visible when your administrator has assigned them to you
- Click on the Prospect or Lead to open and review the information provided by Cisco
- To begin working the Lead or Prospect, select Edit and set the status to Actively Working
- Add notes and attachments and update the status as soon as it changes through the sales cycle

* If using My Cisco Workspace, you must first have added the Leads & Target Prospects module. See page 9.



Prospect Expiration

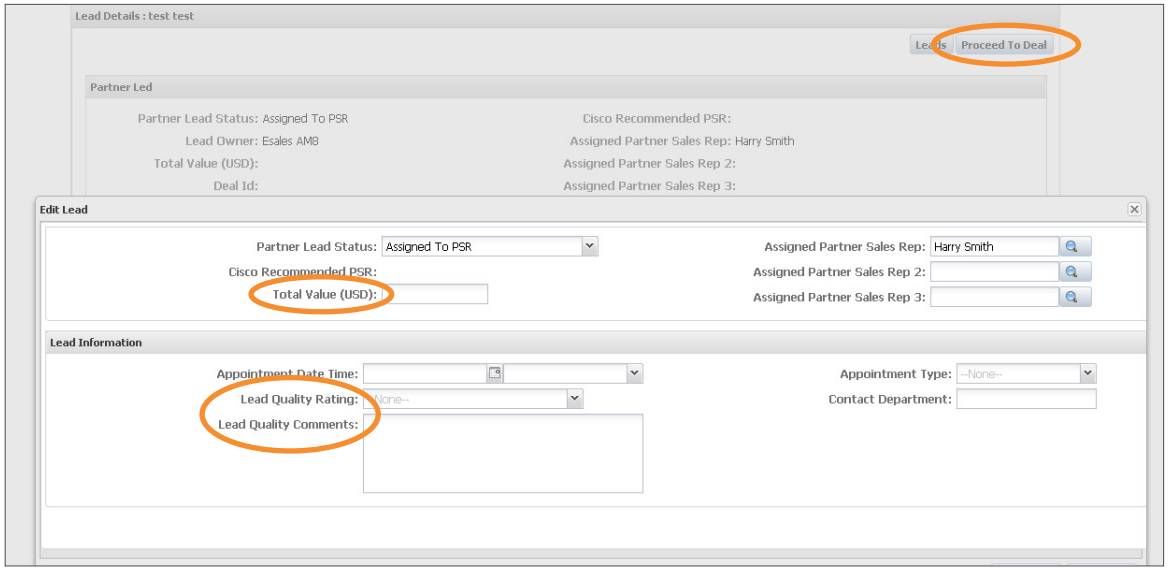
Target Prospects contain a deadline date by which you will need to take action.

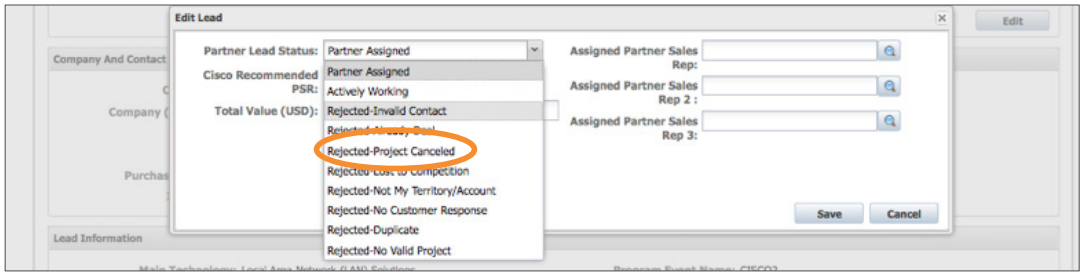
- This date will be 15, 30, 60 or 90 days from when the Target Prospect was assigned to your company.
- The expiry date and "age" of the prospect is clearly noted and those expiring within the next 7 days are highlighted in red.
- You can invoke an automatic extension of 30 days (once only).
- The expiry date is extended by 60 days when the prospect is converted to a new deal.
- If the Expiring On field is blank, there is no expiry date associated with that record.

Partner Sales Rep Responsibilities

Complete the Sales Process

- If proceeding to deal, enter the Total Value, and then click the Proceed To Deal button.
- You will be taken to Cisco Commerce Workspace (CCW) where you can add additional details as prompted to complete the deal registration process.
- Key information from the original Prospect or Lead record will be pre-populated into CCW to reduce your data entry.
- Follow the existing CCW sales process through to order.
- If there is no opportunity, change the status to Closed and provide details of why the Deal did not materialize for the Prospect or Lead.
- To reject the Prospect or Lead, click Reject and select a reason.
- For Prospects, provide additional details on the rejection reason. For Leads, please leave a Lead Quality Rating and Comment.
- The details of the Prospect or Lead will no longer be visible to you.



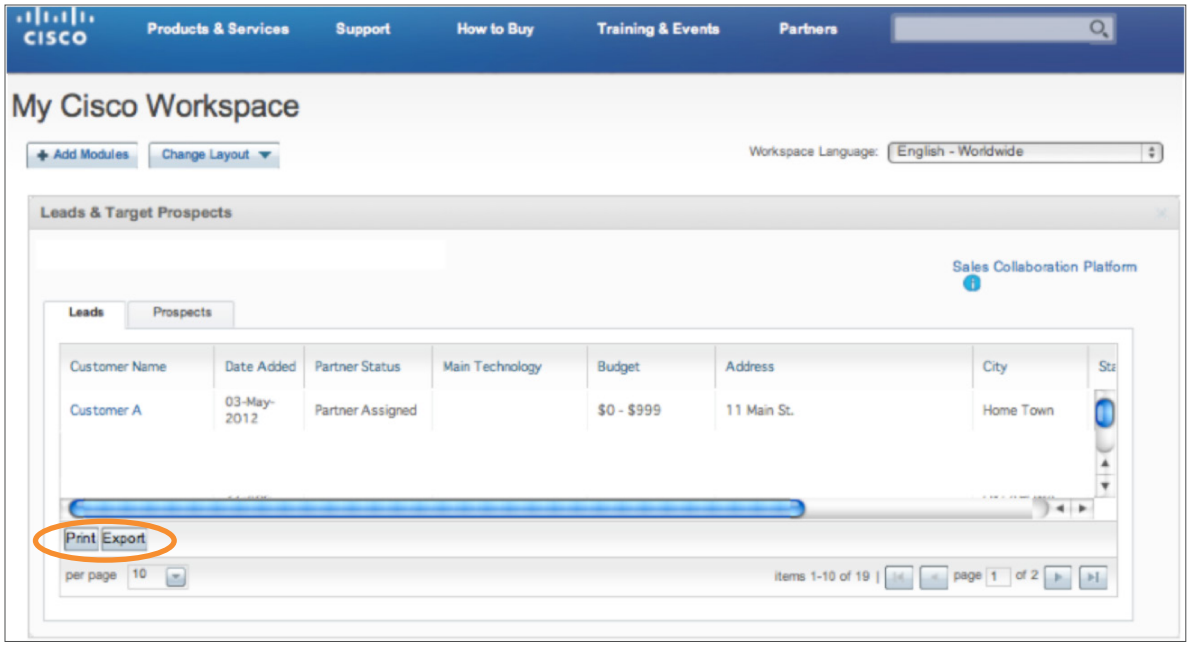


Tracking

Go to the My Leads & Target Prospects module in My Cisco Workspace and view new and existing Leads and Target Prospects under the corresponding tab.

To download the data, click Export or Print.

Your Cisco sales contact has access to reporting so please ask if you are interested in receiving reports.



Need Help?

For technical support with this process, please contact the Partner Relationship Team (PRT).

Cisco Sales Collaboration Mobile: SCP Mobile

Now, you can take this powerful tool with you wherever you go, using the innovative, new Cisco Sales Collaboration Mobile app for mobile devices.

SCP Mobile is an extension of your desktop, enabling you to get closer to prospects and leads with powerful mobile features such as GPS maps, automatic updates, and favorites.

SCP Mobile will work on iPhones, iPads, Android smartphones and Android tablets; first in English, with 16 other languages being added during 2013.

Registered users of the Sales Collaboration Platform can go to the Apple App Store or Google Play Store and search for SCP Mobile. Install the app using your iTunes or Google Play credentials.

For your security, your Cisco.com authentication is required to log in. You'll find a familiar, easy-to-navigate experience, starting with the Recent screen. Toggle between Leads, Prospects, and All views and see the status of each record.

Select Leads or Prospects in the bottom navigation, toggle to the Map view, and you'll see all the leads and prospects on a clear, easy-to-follow GPS map. If you're using a tablet, you can also see List and Map views side-by-side for added convenience.

Whichever view you choose, you'll find all the information at your fingertips. Just tap on the record to get a complete overview. You can also search and filter prospects and mark Favorites by tapping the star.

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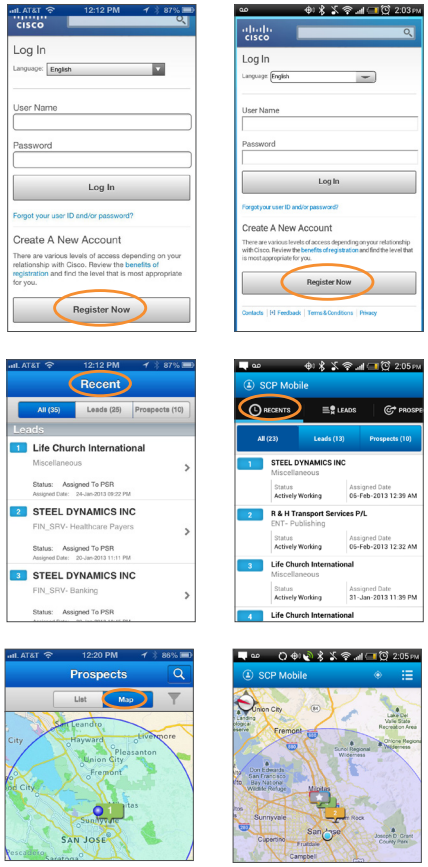


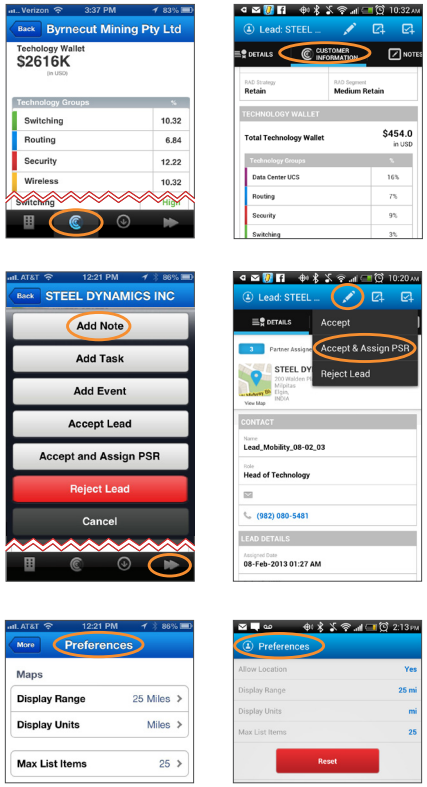
You want every advantage you can get when it comes to generating new business. Tap the Target icon to view Customer Intelligence data about your customers and prospects (when available) to give you a competitive edge when engaging a new prospect.

It's easy to add Notes, Tasks, and Events on the go, so you can keep all communication about a record in one place, instead of in multiple emails. Just tap a record, then tap the Action button. You can also Accept or Reject Leads and Prospects, and Partner Administrators can Assign them to a sales representative in the usual way. All updates are available in real time back at your desk.

SCP Mobile is customizable to match the way you do business. Set your Preferences for Display Range and Units, and the list of items you want to see on each screen you access.

Then from your desk, you'll enter the deal and close the business in Cisco Commerce Workspace (CCW). With one click to CCW, it's fast and easy.

Just because you're away from the office, doesn't mean you need to be away from the Cisco Sales Collaboration Platform. Download SCP Mobile today and see how far it can take your business.



Need Help?

See the Help section in SCP Mobile. Contact SCP Mobile email support: scp-mobility-support@cisco.com

Glossary

Cisco Commerce Workspace (CCW)

An integrated quoting platform that enables partners to: register deals; configure and price products, software, and related services; submit orders.

Customer Intelligence (CI)

Customer information based on an analysis of installed base data and intelligent predictive models. It includes for each Cisco technology, the company/account's: (1) estimated wallet size – potential technology spend, (2) the prospect's propensity to buy technologies or solutions, and (3) sales alerts with related marketing campaigns.

Deal

A partner sales opportunity, registered in CCW, for which the partner has confirmed the dollar amount, technology, timeframe, and pricing.

Lead (BANT criteria)

A company/account that has expressed interest in a Cisco product or service and is qualified as to budget, need, and timeline. (See the Leads page for details of sub-categories also used.)

Leads & Target Prospects Module

Enables partners to access the Sales Collaboration Platform from My Cisco Workspace or Cisco Commerce Workspace (CCW).

My Cisco Workspace

A customizable workspace designed to improve partner productivity. Add modules from a catalog and get immediate access to the business applications and information you use most frequently.

Partner Led

Cisco's go-to-market model that empowers and rewards Cisco Partners to lead customer engagements in mid-sized and small businesses.

Partner Program Enrollment (PPE)

Partner Administrators use this tool to enroll the partner company in the Sales Collaboration Platform.

Partner Self-Service (PSS)

Partner Administrators use this tool to grant access to Partner Sales Reps (PSRs) and other employees.

Sales Collaboration Mobile: SCP Mobile

The mobile app for the Platform, available on Apple iPhones and iPads and Android smartphones and tablets.

Sales Collaboration Platform

A global platform integrated with Cisco Commerce Workspace (CCW), and designed to accelerate collaboration efforts between partner sales teams and Cisco sales teams.

Target Prospects

A company/account that, based on intelligence and analytics, that has a high potential to generate an opportunity for one or more technologies or solutions.

The Sales Collaboration Partner Admin (PA)

The person identified to enroll the partner company in the Sales Collaboration Platform and grants access to other employees/contacts. They could be a Sales Manager, Sales Rep, or Sales Administrator and are responsible for accepting/rejecting, and assigning leads and target prospects to Partner Sales Reps (PSRs). The Partner Admin can also perform the functions of the Partner Sales Rep. A partner can have several PAs.

The Sales Collaboration Partner Sales Reps (PSRs)

Salespeople at the partner company. They accept/reject, update and convert leads and target prospects in the Sales Collaboration Platform, collaborate on opportunities with their Cisco Sales contact and enter deals in CCW.

Uncovered Prospects

A company/account that, based on intelligence and analytics, has little or no Cisco purchase history but has potential for a specific technology or solution.

Support

Please talk to your Cisco relationship contact; the Platform is designed for you to work together.

For Technical Support Using the Platform

- Please contact the Partner Relationship Team (PRT)

For Technical Support Using SCP Mobile

- See the **Help** section in SCP Mobile.
- Contact SCP Mobile email support: scp-mobility-support@cisco.com

Information, Training, and Videos

- View and/or download resources at Cisco Sales Collaboration Platform (on Partner Central).

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