Partner Self Service

User Guide

March 10, 2024

About this Guide

This guide provides step-by-step instructions for how to use the Partner Self Service (PSS) application.

The buttons above are active and will take you to the section of this guide where you can manage your information.

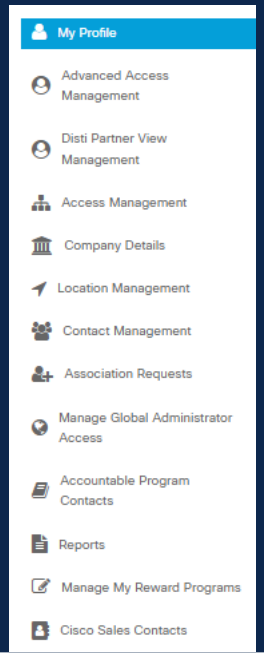
By clicking the "Table of Contents" button, you will have access to a list of the sub-sections of the buttons above.

Access to PSS Application

To access the application, you must complete two steps:

1. **Obtain a Cisco.com User profile and password**
   - Refer to: https://id.cisco.com/signin/register to create your profile.
   - Once completed, you will receive an email confirming your Cisco.com User profile creation.
2. **Obtain partner level access**
   - This can be completed by associating your profile with your partner company.
   - Refer to the "Associate Myself with a Company" section for the steps to complete this task.

In the Partner Self Service application, the left navigation (pictured below) will take you to top level tasks where you can view and manage them to ensure your employees and company are properly mapped to Cisco. Click any of the sections above to navigate to specific tasks.



Task Navigation Menu

User Definitions

Why this is important:

Here you will learn which users (Guest User, Partner User and the Partner Self Service (PSS) Partner Administrator) can perform which tasks, along with detailed definitions

It's important to understand who can perform which tasks so that there is no disruption in your selling cycle.

Click this task to navigate to:

User definitions

About Users – What Are the Tasks They Can Do?

Throughout this guide you will see references to different user levels. Below are the tasks that can be managed by each level:

Guest User

User is not associated to a Partner company.
This role cannot grant access to others.

- Associate Myself with a Company

Partner User

User is associated with Partner company.
This role cannot grant access to others.

- Manage My Profile
- Access Management (i.e. For viewing and *requesting access to* partner applications, and roles (PSS admin access, PM&A + PPE, etc.)
- Manage My Reward Programs
- View Cisco Sales Contacts

Partner Self Service (PSS) Administrator

The first person to register the company as a registered partner with Cisco, will be assigned to this role.
This role can grant access to tools, applications, and roles ONLY to employees who are associated with the company.

- Manage My Profile
- Access Management (i.e. For viewing and *granting access to* partner tools administrator access to others (i.e. PSS admin access, PM&A + PPE)
- Advanced Access Management (for PXP and (Enterprise Agreement Management Portal (EAMP) access) –Manage My Reward Programs
- View Cisco Sales Contacts
- Company Details
- Location Management
- Contact Management
- Association Requests
- Accountable Program Contacts (i.e. Assign rebate coordinator(s), program coordinator(s), and payment administrator(s))
- View and Download Reports
- Manage Corporate E-mail Domains
- Global Administrator (Can manage multiple geographies)
- Distributor Details (Only for Partner Admins of 2-Tier companies)

Associate Myself with a Company

Why this is important:

Associating yourself with your company is a critical step with the set-up process. Once you are associated with your company, you will gain partner level access to Cisco Partner tools.

If additional tool access is needed, your PSS Administrator can assign you access and roles to facilitate specific tasks.

Click this task to navigate to:

Work Instructions

Only **Guest User** can complete this task:

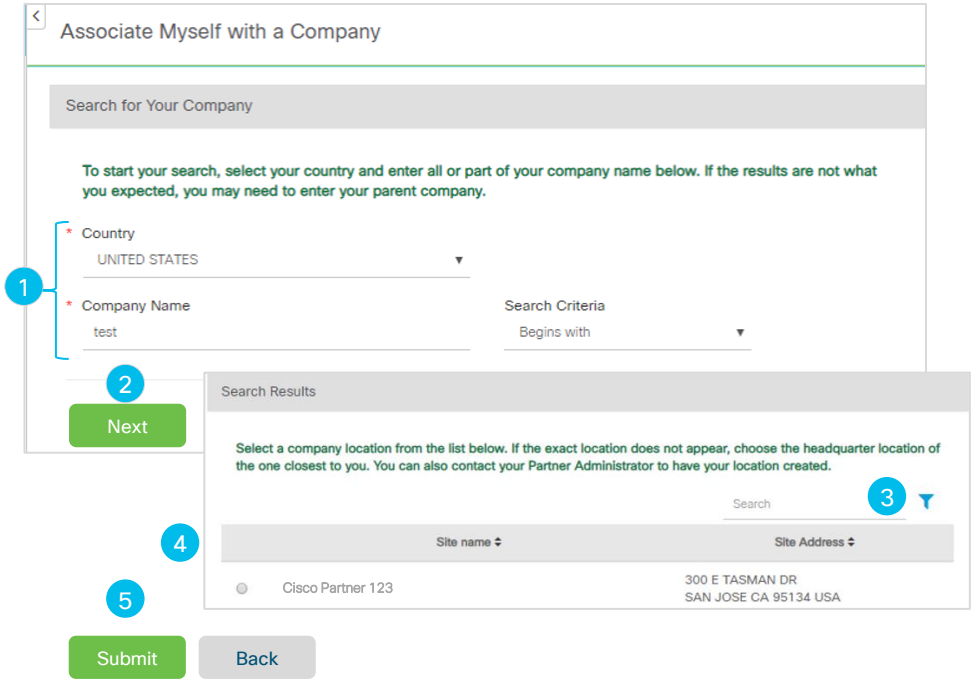
Click on task: Associate Myself with a Company

1. Fill in Company Details
2. Click "Next"
3. Click "Search" icon to display list of addresses
4. Click on radio button for company selection
5. Click "Submit" button to proceed to next page

Why do I need to do this?

In order to be granted access to specific tools and/or assigned to roles (rebate coordinator) you must first be associated with your company. Contacts must be associated to the company to gain partner level access and so their profile details can flow over to partner tools for usage with applications/enrollments.

Associate Myself with a Company



bution.

Only **Guest User** can complete this task:

6. You will receive a prompt with a status of your company association request

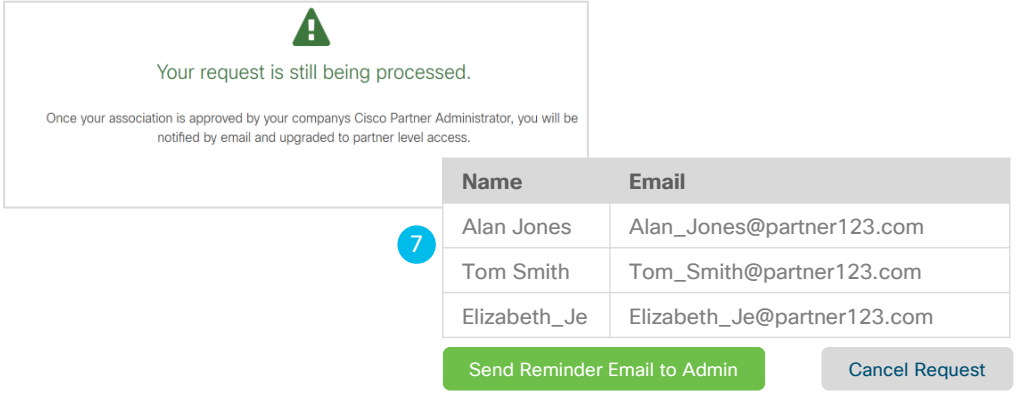
7. A list of Partner Administrators will be generated who can approve your request. You may send a reminder to the approver list by clicking the "Send Reminder Email to Admin" button

Once your company association has been completed, you will receive a confirmation email from Cisco.

Please allow 24-48 hours after association approval to access partner tools.

Associate Myself with a Company - Continued

6



Manage My Profile

Click to Navigate to Work Instructions

Edit Basic Profile Information

Why this is important:

This section will cover the steps to manage how to edit your associated profile information.

Click to navigate to:

Only Partner User and PSS Administrator can complete this task:

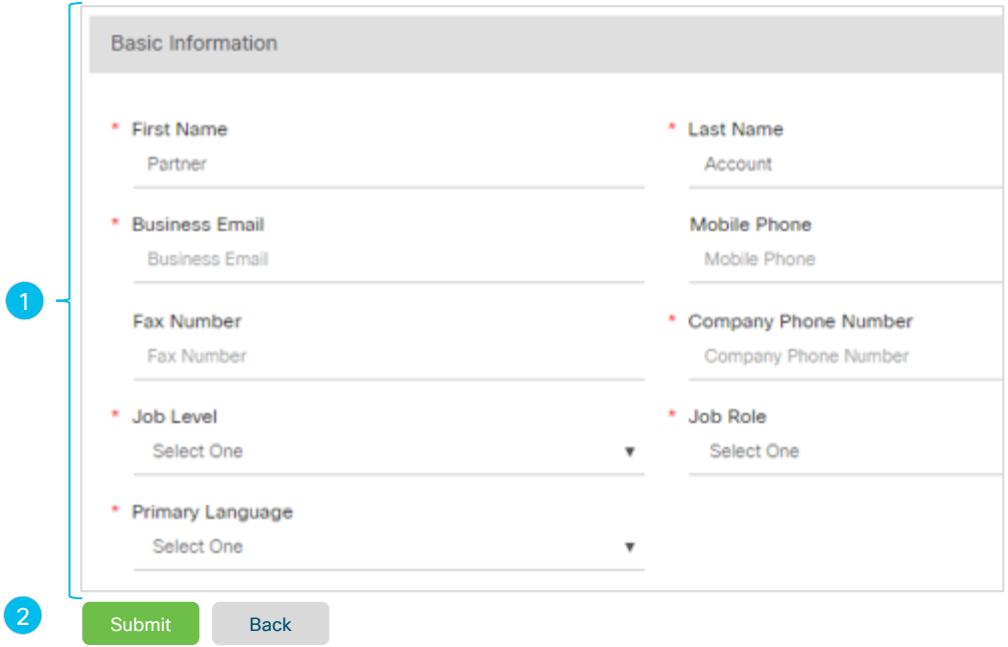
Click on task: My Profile

1. Edit "Basic Information" section
2. Review and click "Submit" button, and a pop-up menu confirming your update will appear

Why do I need to do this?

This helps ensure that Cisco has the most up-to-date information about you and your company should we need to get a hold of you.

Edit Basic Profile Information



Only Partner User and PSS Administrator can complete this task:

Click on task: My Profile

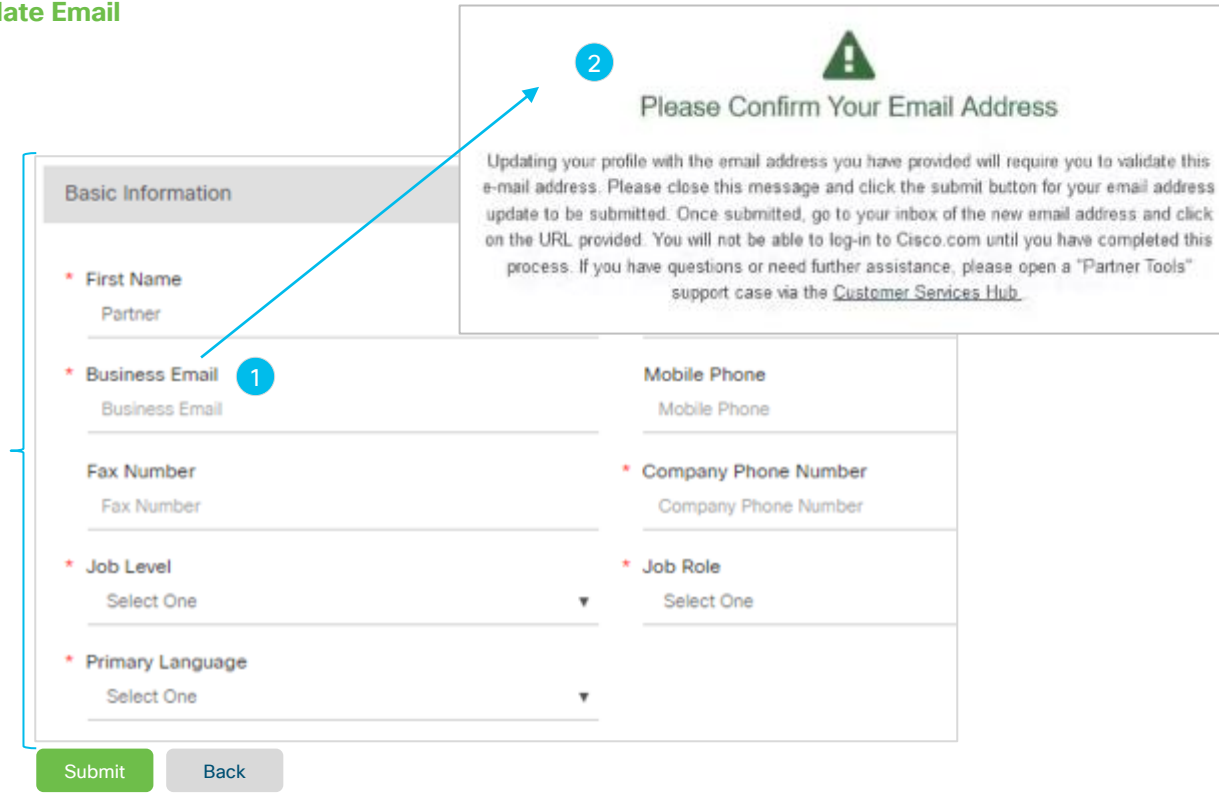
1. Edit "Business Email" field

2. You will be prompted with a "pop up window" that includes instructions to go to your new email to click on the URL provided.

   Note: This pop-up window will not happen if you are just updating your PSS email to match with the Cisco.com email that you used with log in so proceed to step 3 to "submit". If you are prompted with the pop-up window, you will not receive the new email until you click the "submit" button as instructed in step 3."

3. Close the "pop-up window", then click the "Submit" button.

Update Email



Change Associated Location

Why this is important:

This section will cover the steps to manage your associated location for your current company. This step is important to ensure that your business information is accurate for additional administrative aspects.

Click to navigate to:

Work Instructions

Note: If you have moved to a new company and would like to change your association to the new company, please navigate to Change / Remove Company Association.

Only Partner User and PSS Administrator can complete this task:

Click on task: My Profile

1. Scroll to the "Business Address" section, then "Change Location" section in the pop up menu that has opened
2. Click on "Change Location" link, proceed to step 3

Why do I need to do this?

By ensuring your associated location is correct, it will optimize your experience with Cisco. We can be in a better position to contact you when needed.

Change Associated Location

1

Business Address	
Partner Name	Partner123
Business Address 1	123 Cisco Way
Business Address 2	
Business Address 3	
City	San Jose
State/Province	CA
Country	United States
Postal Code	95131

2

Change Location
Change or Remove My Company Association
Delete Additional Cisco.com User IDs

Only Partner User and PSS Administrator can complete this task:

3. Click on "Change Location" button in the pop-up menu
4. Choose any of the radio buttons corresponding to the address of your new location
5. Review, then click the "Submit" button, a pop-up screen will appear confirming your request

Change Associate Location - Continued

Change Location	
Your Current Location	
Site Name	Partner123
Business Address 1	123 Cisco Way
City	San Jose
State/Province	CA
Country	United States
Postal Code	95131

3 Change Location

To change locations, select a new location from the following list:

	Site Name ⬍
○	**Partner123,** 456 Cisco Way, San Jose, CA 95131, United States
○	**Partner123,** 2727 Palm Tree Way, San Jose, CA 95128, United States
○	**Partner123,** 9000 Catalyst Way, Milpitas, CA 95132, United States

4

5 Submit

Change / Remove Company Association

Why this is important:

Occasionally individuals will need to change or remove their company due to a company departure or a job change. Here you can modify details of which individuals are associated with a company.

Click to navigate to:

Work Instructions

Only Partner User and PSS Administrator can complete this task:

Click on task: My Profile

1. Scroll to Business Address
2. Under Business Address, click on "Change or Remove my Company Association" link, proceed to step 3

Change / Remove My Company Association

1

Business Address	
Partner Name	Partner123
Business Address 1	123 Cisco Way
Business Address 2	
Business Address 3	
City	San Jose
State/Province	CA
Country	United States
Postal Code	95131

2

Change Location
Change or Remove My Company Association
Delete Additional Cisco.com User IDs

Why do I need to do this?

If you have moved to a new partner company, first complete steps 1-5 shown on this slide and the next slide to remove your association from previous partner company. Once completed, go to Associate Myself with a Company to submit association request to the new partner company.

Only Partner User and PSS Administrator can complete this task:

3. Click on "Change/Remove My Company Association" button

4. Click the "Yes, Remove my Association" confirmation button to proceed. A confirmation message will be displayed.

Change / Remove My Company Association - Continued

3

Change or Remove My Company Association

You are currently associated with:

Partner123
United States

Change/Remove My company Association

You may associate to another company by selecting "Associate my Cisco ID with my Partner Company" at next step.

4

Change/Remove Association

Are you sure you want to proceed?

Yes, Remove my Association | No

Important

If you are the only individual associated to the company, please go to Support & Resources section for instructions to open a customer service case for assistance.

Delete Additional Cisco.com User IDs

Why this is Important:

It's important that there is only one active Cisco.com User ID linked to your profile in Partner Self Service. Occasionally users can end up with more than one Cisco.com User ID. Follow the process steps in this section to delete additional Cisco.com User IDs.

Click to navigate to:

Work Instructions

Only Partner User and PSS Administrator can complete this task:

Click on task: My Profile

1. Scroll to "Business Address"
2. Under Business Address, click on "Delete Additional Cisco.com User ID's" link *(this link will only be visible if there are multiple Cisco.com User IDs linked to the profile)*, proceed to step 3.

Why do I need to do this?

It is important to ensure that you have a single Cisco.com User ID so that all future communications, system prompts, and other interaction with Cisco systems is optimized. Please use this section to ensure this step is completed.

Delete Additional Cisco.com User IDs

1

Business Address	
Partner Name	Partner123
Business Address 1	123 Cisco Way
Business Address 2	
Business Address 3	
City	San Jose
State/Province	CA
Country	United States
Postal Code	95131

2

Change Location
Change or Remove My Company Association
Delete Additional Cisco.com User IDs

Only Partner User and PSS Administrator can complete this task:

3. Click on the "Yes delete the additional User IDs"

Important

The check boxes are pre-selected for you and not modifiable. This action will not affect any Individual qualifications you may have linked to your PSS profile based on your CSCO testing ID connection.

If you have any questions/concerns, please open a "Partner Tools" support case via the Customer Services Hub before taking any action.

Delete Additional Cisco.com User IDs - Continued

Delete Additional Cisco.com User IDs

You are currently logged in with **tomsmith@partner123.com** which is linked to Cisco.com User ID **tomsmith1234.**

To help avoid access issues with Partner tools and possible data mismatches between your Cisco.com user profile and your Partner Self Service (PSS) profile, there should only be one Cisco User ID linked to your associated contact profile in PSS.

Please click the delete button below to remove the additional Cisco.com User Id's from your PSS profile. Additional Cisco.com User ID's:

- ☑ **tomsmithXYZ** linked to tomsmithXYZ@partner123.com
- ☑ **tomsmith767** linked to tomsmith767@partner123.com

3 Yes, delete the additional user IDs

Note: This action will not affect any Individual qualifications you may have linked to your PSS profile based on your CSCO testing ID connection. If you have any questions or concerns, please open a "Partner Tools" support case via the Customer Services Hub before taking action.

Add Cisco Testing to Your Profile

Why this is important:

To ensure that all individual Cisco certifications are mapped to your Cisco.com User ID, you must complete this step, otherwise you will be prevented from being auto-enrolled into Programs of which you are eligible.

Click to navigate to:

Work Instructions

Only Partner User and PSS Administrator can complete this task:

Click on task: My Profile

1. Scroll to "Cisco Testing Information" section
2. Add "Cisco Test ID" corresponding to your profile
3. Click on "Submit" button. A confirmation message will be displayed.

Adding Cisco Testing Information to Your Profile

1

Cisco Testing Information

If you have passed any certification exams, enter your CSCO number. To ensure this certification is added correctly, make sure the first and last name in your profile matches the name on the test. Click here to find your testing information.

Cisco Testing ID (CSCO#)

2

Cisco Testing ID (CSCO#)

{For example: CSCO12345}

If you have more than one CSCO#, click here.

Cisco Communications

Occasionally, Cisco sends communications about products, programs, special offers, services, support, or invitations to participate in market research. Your personal information will be used in accordance with Cisco's privacy statement.

I would like to receive Cisco communications by email. Yes ● No ○

3

Submit

Receive Cisco Communications

Why this is important:

Staying on top of the latest technology solutions is a great way to increase your competitive edge in the marketplace. This is a mandatory step in your set-up process, and this section provides a simple set of steps to complete this requirement.

Click to navigate to:

Work Instructions

Partner Users must complete this task:

Select task: My Profile

1. Scroll to "Cisco Communications" section.
2. Choose your preference by selecting the corresponding radio button. (mandatory)
3. By selecting Yes, a menu of options will display. Here you can select or deselect previous selections. By selecting No, all previously selected options will be disabled.
4. Select the "Submit" button. A confirmation message will be displayed.

Why do I need to do this?

This is a mandatory step to complete your profile.

Staying on top of the latest technology solutions is a great way to increase your competitive edge in the marketplace.

Receive Cisco Communications

1 **Cisco Communications**

2 If you select "yes" you will always have the opportunity to choose only the notifications you would like to receive related to Cisco products, services, promotions, surveys, events, or trainings. You have the ability to unsubscribe to selected notifications at any time. Your personal information will be used in accordance with Cisco's privacy statement.

I would like to receive communications by email. Yes ● No ○

3 **Please select the areas that are of interest to your business** ☐ **Select/Unselect All**

☐ Technology Interests

☐ Cloud	☐ Collaboration, Voice	☐ Data Center/Virtualization
☐ Enterprise Networks	☐ Internet of Everything (IoE)	☐ Mobility
☐ Security	☐ Services	☐ Software/ACI

☐ Communications Interests

☐ Case Studies	☐ Cisco Capital & Financing	☐ Cisco Vision & Thought Lead..
☐ Competitive	☐ Events, Webinars	☐ Incentives, Discounts, Rebate
☐ Marketing Campaigns	☐ News, Acquisitions, Strategic	☐ Product, Launches & EOS
☐ Partner Program Information	☐ Pricing Information	☐ Support & Tools

4 Submit

Manage My Company

Click to Navigate to Work Instructions

Company Details | Location Management | Contact Management

Company Details

Why this is important:

This section will cover the steps to modify your company information and how to view your company's Cisco Certifications, Specializations, and Authorizations.

Here you can also view and manage your company corporate web address, federal tax ID, VAT number, e-mail domain name, and company description.

Click to navigate to:

Work Instructions

Only PSS Administrator can complete this task:

Click on task: Company Details

1. A pop-up window will appear that lists the different registered companies
2. Click "Select" button to choose the company you would like to update
3. In the "Business Information" section you should be able to update:
   - Corporate Web Address
   - Federal Tax
   - VAT Number
   - Email Domain Name
   - Company Description
4. Click "Submit" button to save changes, proceed to step 5

Note: You can click "Change" to select any of your different registered company instance

Company Details

1 Search Company

Select Company and Geography 2

Partner123 (United States) Select

Number of Contacts: 89
Number of Locations: 6

Company Details	Partner123 United States [Change]
3 Business Information	
Company Name Partner123	**Country Name** United States
Headquarter Address 123 Cisco Way, San Jose, CA 95131 United States	**Purchasing Relationship** Indirect
***Corporate Web Address** www.partner123.com	**Federal Tax ID** 1234567
VAT Number 1234567	**Email Domain Name** Partner123.com
***Company Description** Software technology company	

4 Submit

Only PSS Administrator can complete this task:

5. As you scroll down through the "Company Details" section, you will be able to view your:
   - Registration Status
   - Application Details
   - Agreement Dates and Timelines

Keep scrolling to view your competency program status. Proceed to step 6

Company Details - Continued

5

Registration Status	Agreement Dates Timeline
Application ID: 123456	**Agreement Expiration Date** 14-May-2023
Application Status: Approved	**Agreement Effective Date** 15-May-2021
Application Type: Partner Registration	**Agreement Approved Date** 15-May-2021
Applicant Cisco.com User ID: pam@partner123.com	**Agreement Signed Date** 15-May-2021
Applicant Details	
Name: New Name, New Surname	
Phone: 408-555-1212	
Email: email@domain.com	
Full Name on Agreement: partner123	

Only PSS Administrator can complete this task:

6. As you scroll down through the "Company Details" section, you will be able to view your:
   - Certifications
   - Specializations
   - Authorizations
   - Last Approval Date
   - Renewal Due Date

Important

It is important to review renewal and expiration dates in order to stay in good standing with the eligibility requirements for the Cisco Programs of which you are enrolled

Company Details - Continued

6

Partner Certification/Specialization/Authorizations

Search

Qualification Type	Certification/Specialization(s)/Authorization(s)	Last Approved Date	Renewal Date
Auth	CSPP Identifier	05-May-20	01-Jan-22
Auth	Cisco Open Stack Private Cloud	05-May-20	01-Jan-22
Auth	Disabled Veteran Business Enterprise	05-May-20	01-Jan-22
Auth	HubZone Small Business	05-May-20	01-Jan-22

Location Management

Why this is important:

Here you will learn how to manage the location of the offices of your company, within the selected country. As well as editing the details of the location, or deleting a location if the company moves, you can also select which office serves as your head office and whether a location is shown in the Partner Locator application.

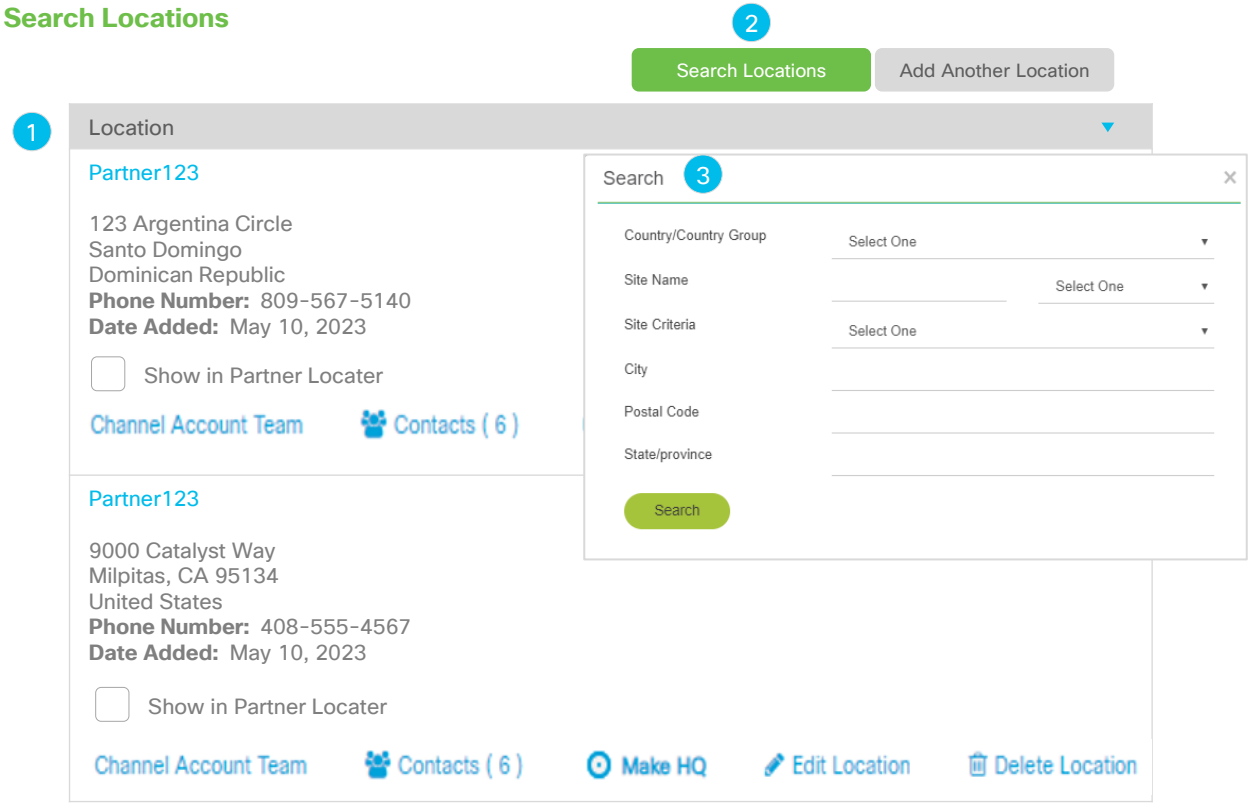
Click to navigate:

Only **PSS Administrator** can complete this task:

Click on task: Location Management

1. Here you can manage the location of your company's offices within the selected country. All site locations will be displayed
2. If you would like to filter for specific locations, click the "Search Locations" button
3. A pop-up menu will appear, enter your search criteria and click the "Search" button, and your results will be displayed

Search Locations

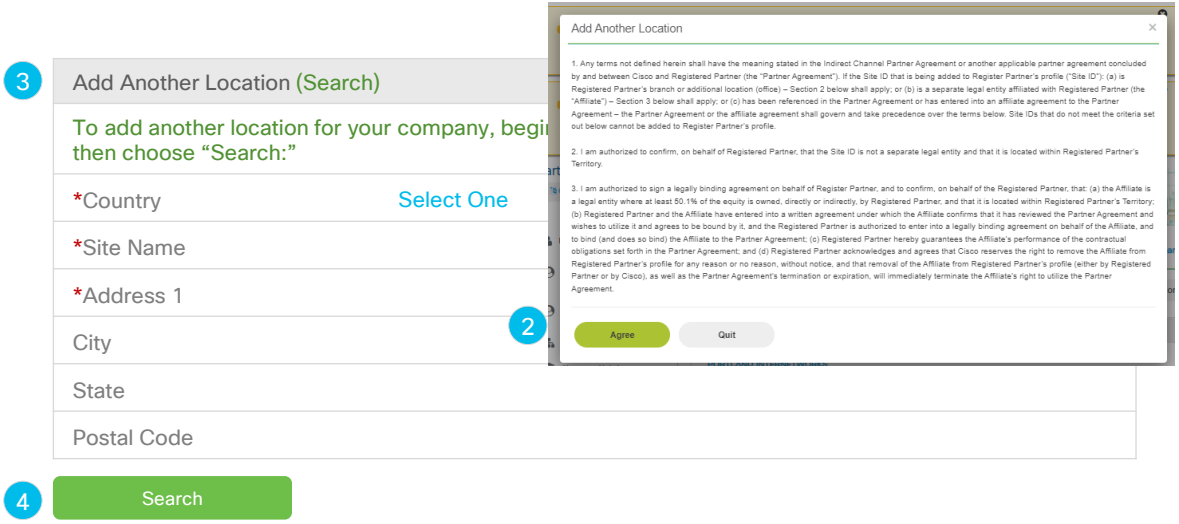


Only PSS Administrator can complete this task:

Click on task: Location Management

1. Click "Add Another Location" button to add an additional location
2. You will be presented with a pop-up window with a legal addendum stating any locations added will be governed by your current ICPA. Click "agree" to continue.
3. Complete the list of fields for the location (red *asterisk fields are mandatory)
4. Click the "Search" button for a list of available locations, proceed to step 5

Add Location



Only **PSS Administrator** can complete this task:

5. Confirm location details and update any additional fields presented. (red *asterisk fields are mandatory)
6. Click "Add" link
7. You will receive a status message

Add Location - Continued

5

Add Another Location (Confirm)	
*Country	United States
*Location Name	
*Address 1	
*City	
State	
Postal Code	
*Phone	
Fax	
Local Language	English
Office Type	Sales Support Office
Is this a support location? Yes ● No ○	
Is this the headquarter location? Yes ● No ○	

6 Add

Message 7

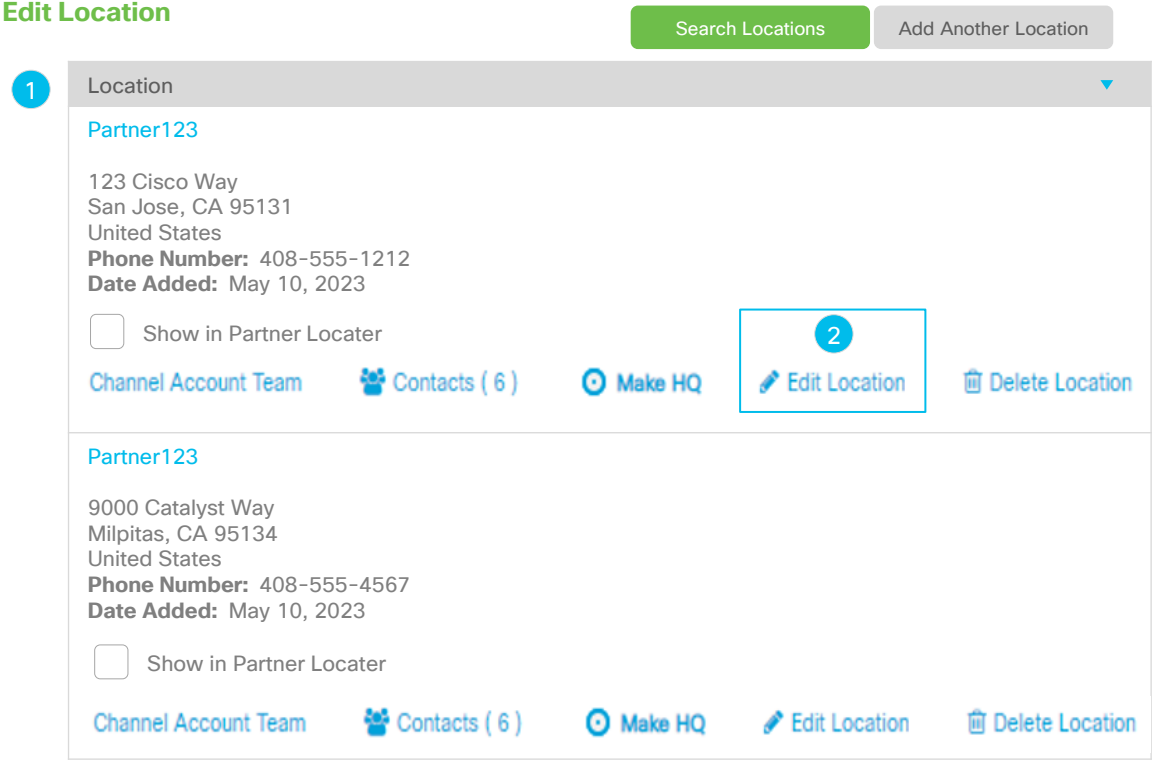
Please allow 24 hours to reflect in Partner Locator.

Only **PSS Administrator** can complete this task:

Click on task: Location Management

1. Your locations will be displayed
2. Click "Edit Location" link, under the location you would like to edit. Proceed to step 3

Edit Location



Only PSS Administrator can complete this task:

3. You will be presented with a pop-up window with a list of fields to complete (red *asterisk fields are mandatory)

4. Click "Update" link. A confirmation message will be displayed.

Edit Location - Continued

3

Update Site	
*Country	United States
*Location Name	
*Address 1	
*City	
State	
Postal Code	
*Phone	
Fax	
Local Language	English
Office Type	Sales Support Office
Is this a support location? Yes ● No ○	
Is this the headquarter location? Yes ● No ○	

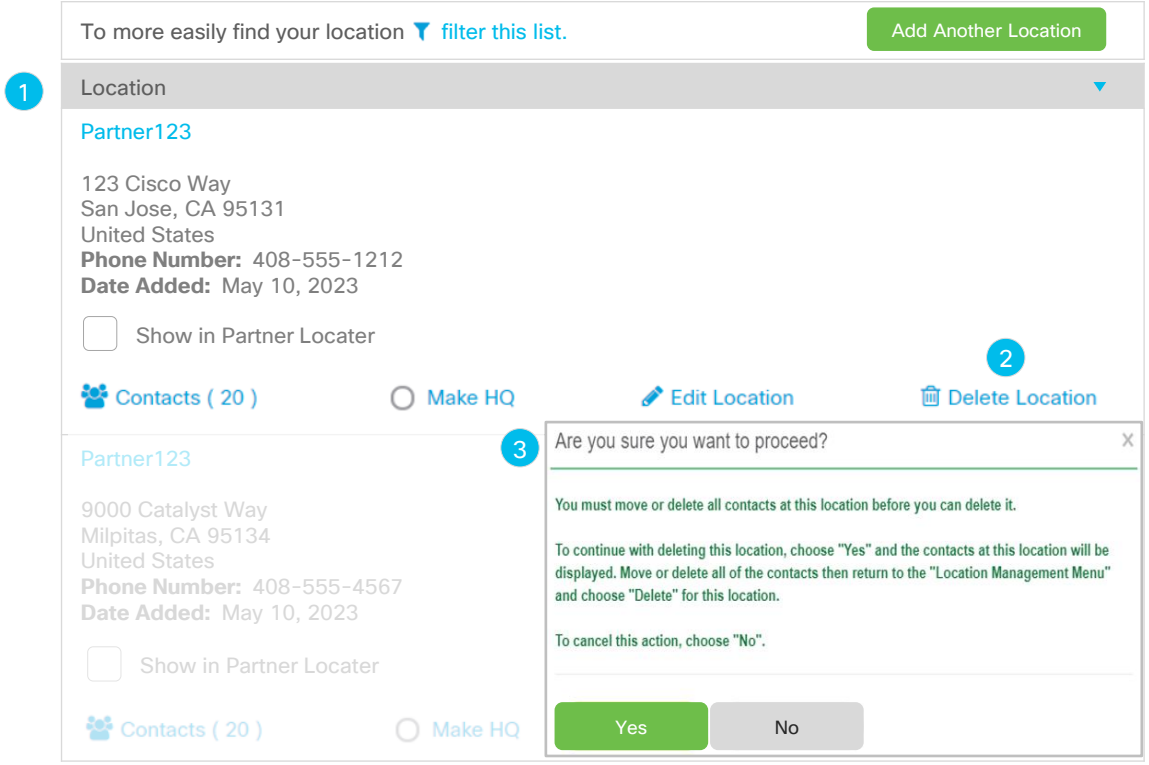
4 Update

Only PSS Administrator can complete this task:

Click on task: Location Management

1. Here you can manage the location of your company's offices within the selected country. Your locations will be displayed
2. Click "Delete Location" button under the location you would like to remove
3. A pop-up message will appear asking if you would like to proceed with deleting your chosen location. Click "Yes" to proceed and complete the task.

Delete Location



Only PSS Administrator can complete this task:

Click on task: Location Management

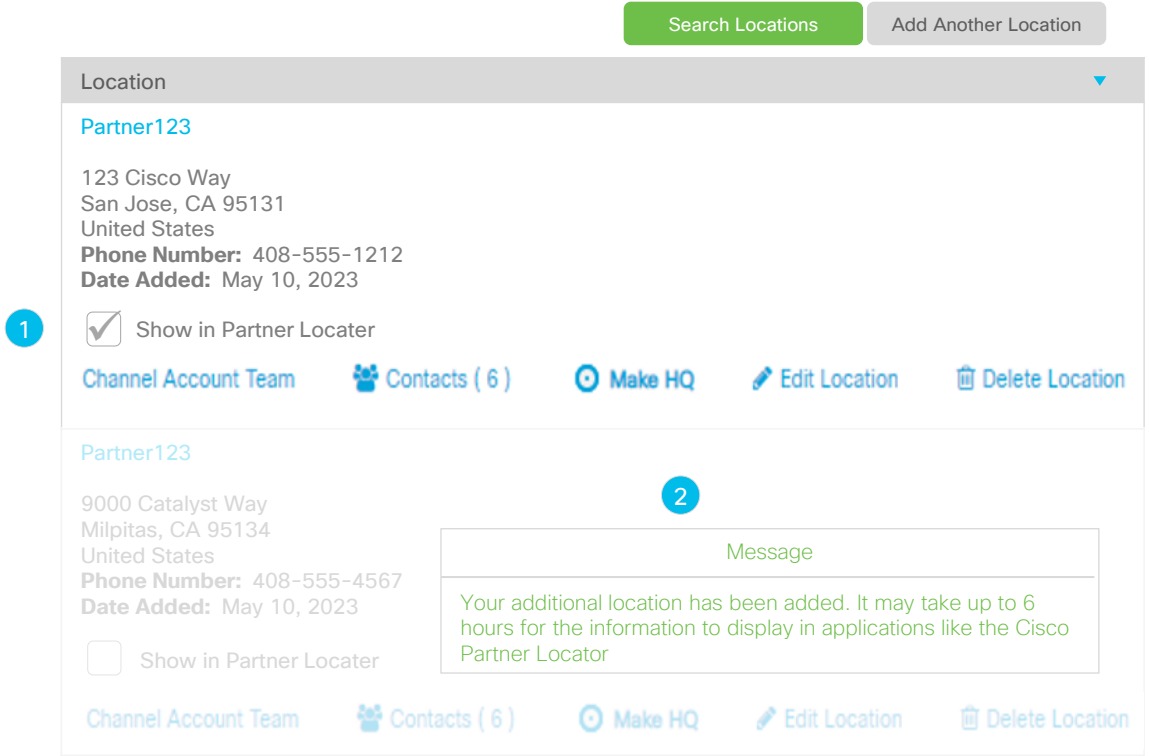
1. Click the "Show in Partner Locator" box to have your company displayed in this application. If you do not check this box, your company will not be displayed in Cisco Partner Locator.

2. You will receive an automated confirmation message

Important

Showing your company in the Cisco Partner Locator, helps customers quickly find your company by your name, location, technologies, industries, and company size.

Display Your Company in the Partner Locator Application

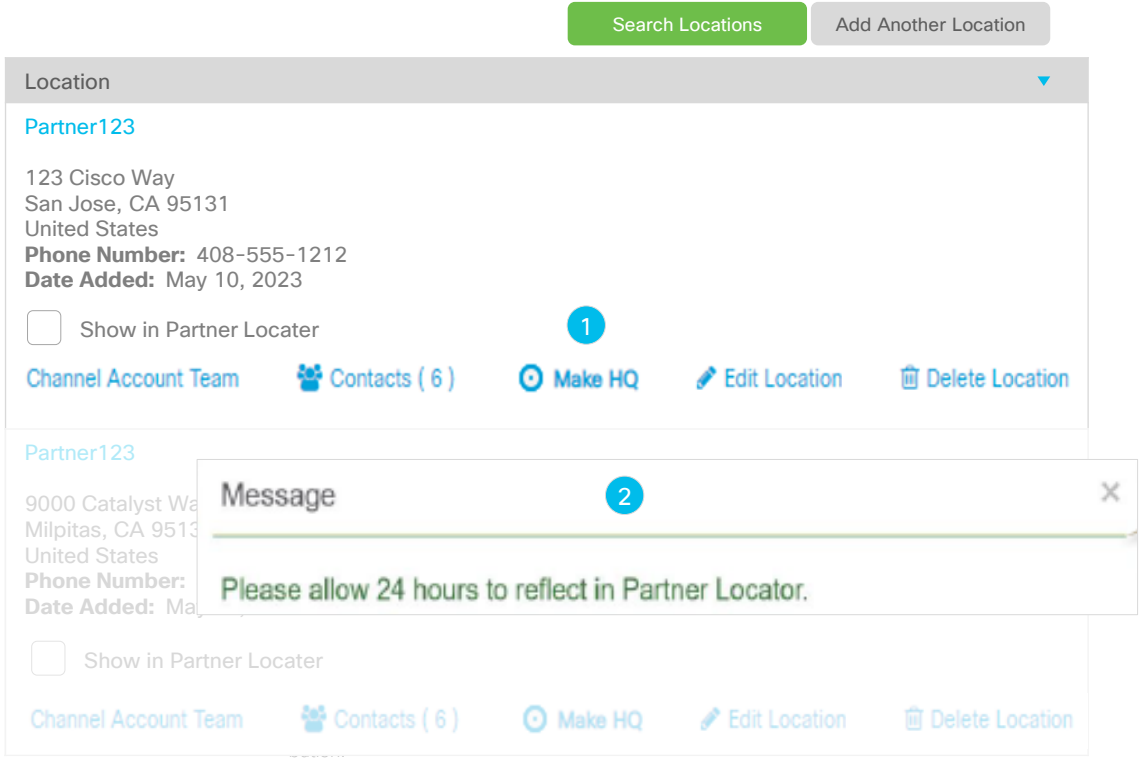


Only PSS Administrator can complete this task:

Click on task: Location Management

1. Review the list of locations presented and click the "Make HQ" link for the location you would like to designate as your HQ location
2. You will receive a confirmation message

Designate HQ Location

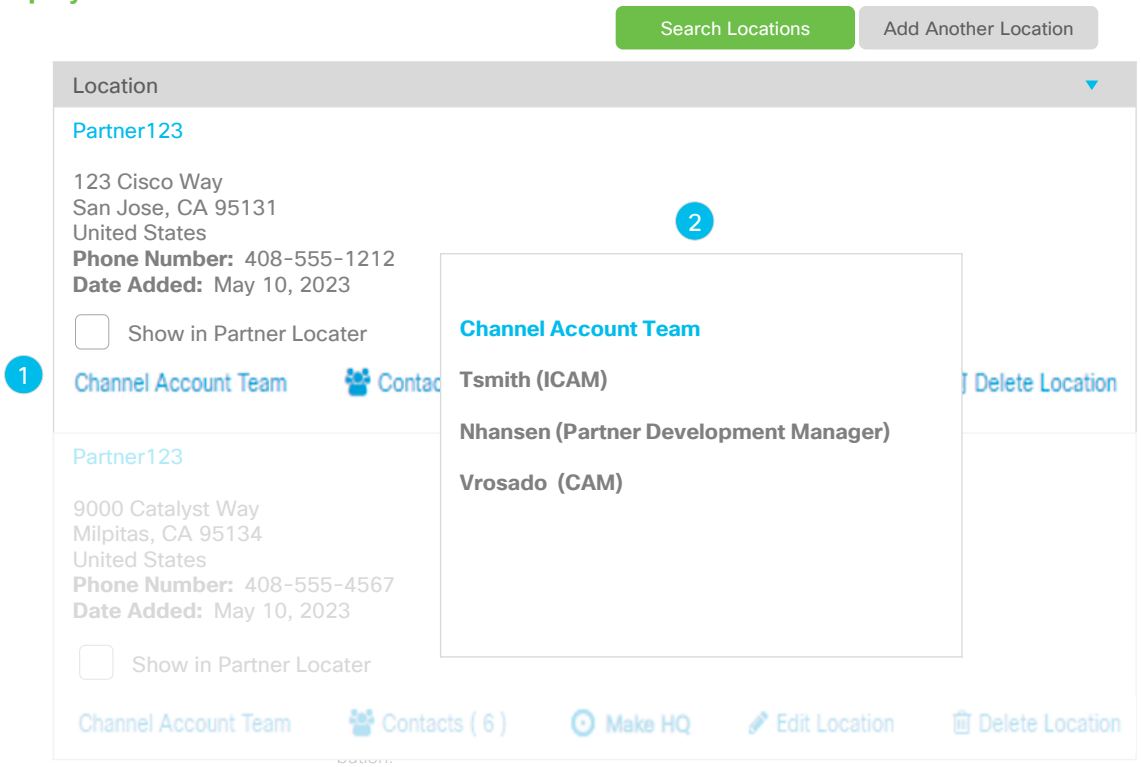


Only PSS Administrator can complete this task:

Click on task: Location Management

1. Review the list of locations presented and click the "Channel Account Team" link to display team members
2. Your Cisco Channel Account Team will be displayed with their Cisco emails and roles

Display Channel Account Team



Contact Management

Why this is Important:

Here you will learn how to manage the contacts for your company. Specific steps to add, delete, and move contacts are addressed along with other details. As a Partner Administrator, you have the controls at your hands are encouraged to keep your contact information up-to-date so that you have a more optimized experience with Cisco.

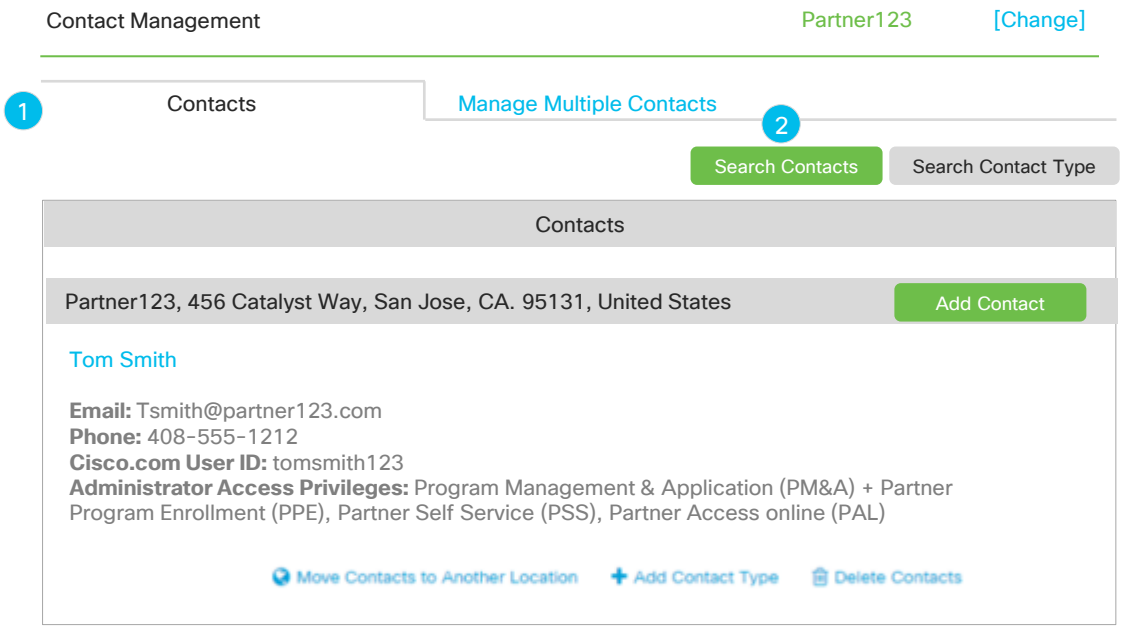
Click to navigate to instructions:

Only PSS Administrator can complete this task:

Click on task: Contact Management

1. Your "Contacts" will display. Within the "Contacts" tab, you will be able to perform the following tasks:
   - Search Contacts
   - Search Contact Type
   - Add Contact
   - Move Contacts to Another Location
   - Add Contact Type
   - Delete Contacts
   - Qualifications (will only appear if you have a testing ID #)
2. Click the "Search Contacts" button, then proceed to step 3

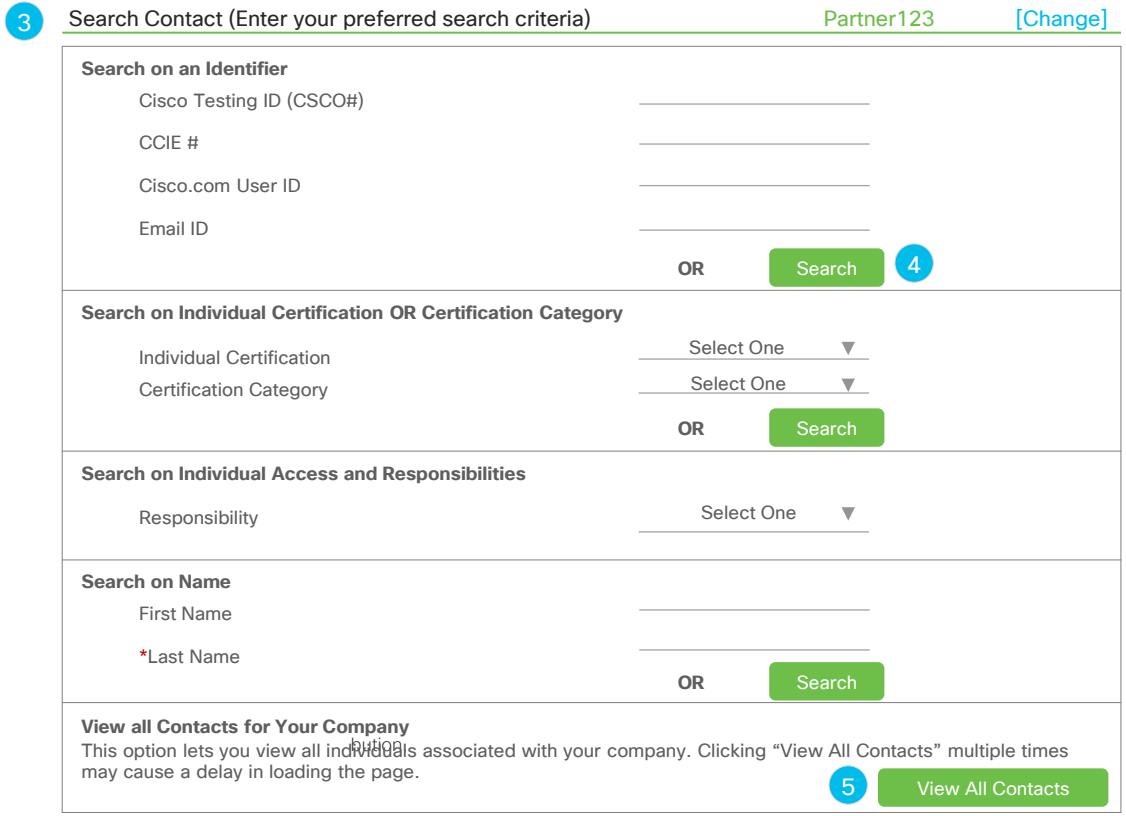
Search Contacts



Only PSS Administrator can complete this task:

3. A pop-up menu will appear where you can use different search queries to search for a contact who is associated with your company in our partner data base. You can search using these criteria:
   - Identifier: Cisco Testing ID (CSCO#, CCIE#, Cisco.com ID, Email ID, or
   - Individual Certificate, or Certification Category, or
   - Individual Access and Responsibilities, or
   - Contact First and Last Name, or
   - By viewing all contacts who are associated with your company
4. Once you have made your selection, click the "Search" button to view all contacts associated with your company. Proceed to Step 6.
5. Click the "View All Contacts" button to view all individuals associated with your company.

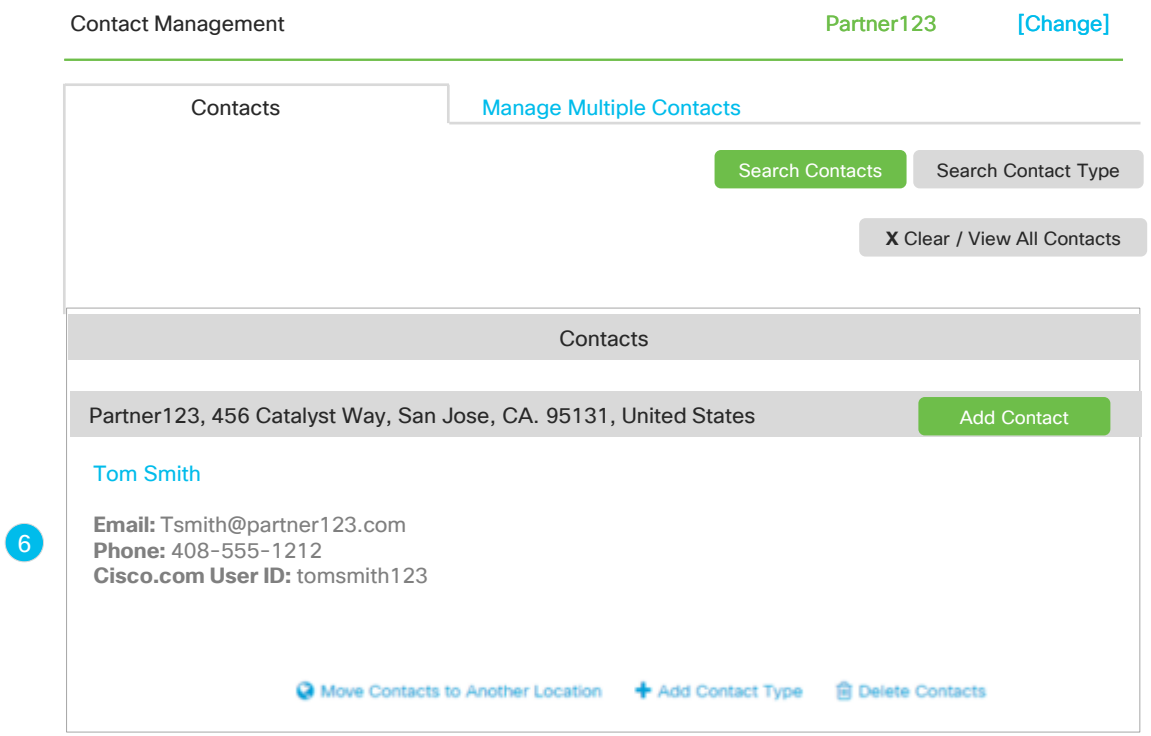
Search Contacts – Continued



Only PSS Administrator can complete this task:

6. The results of your search criteria will be displayed.

Search Contacts - Continued

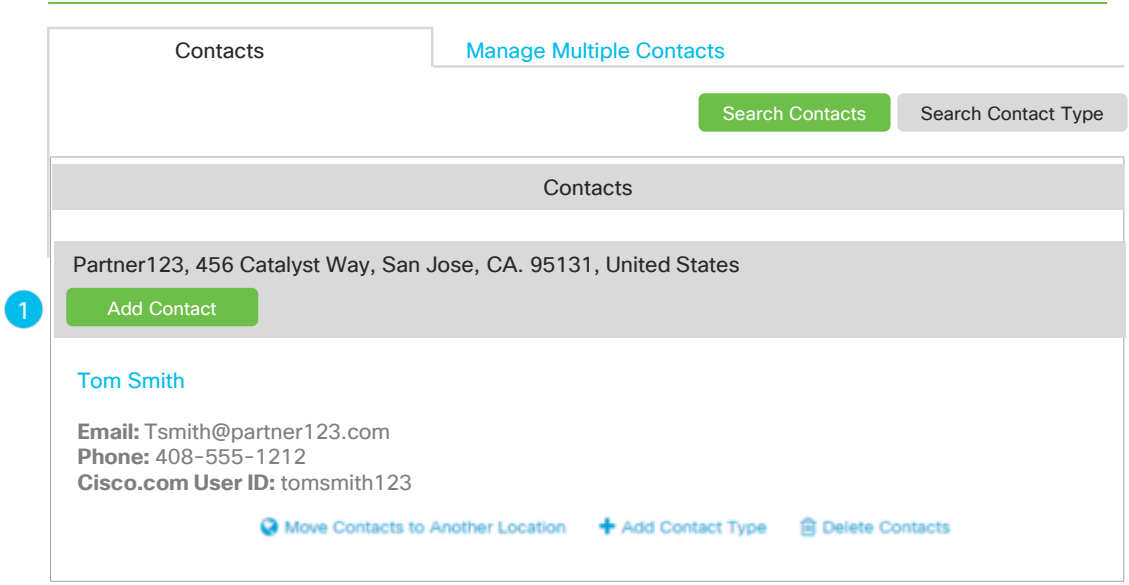


Only PSS Administrator can complete this task:

Click on task: Contact Management

1. A list of associated contacts to your company will be displayed. Click "Add Contact" button, proceed to step 2

Add Contacts



Only PSS Administrator can complete this task:

2. A pop-up where you can either search for the contact by Cisco.com ID (red *asterisk fields are mandatory) or the Cisco Testing ID (CSCO#) or the CCIE #.

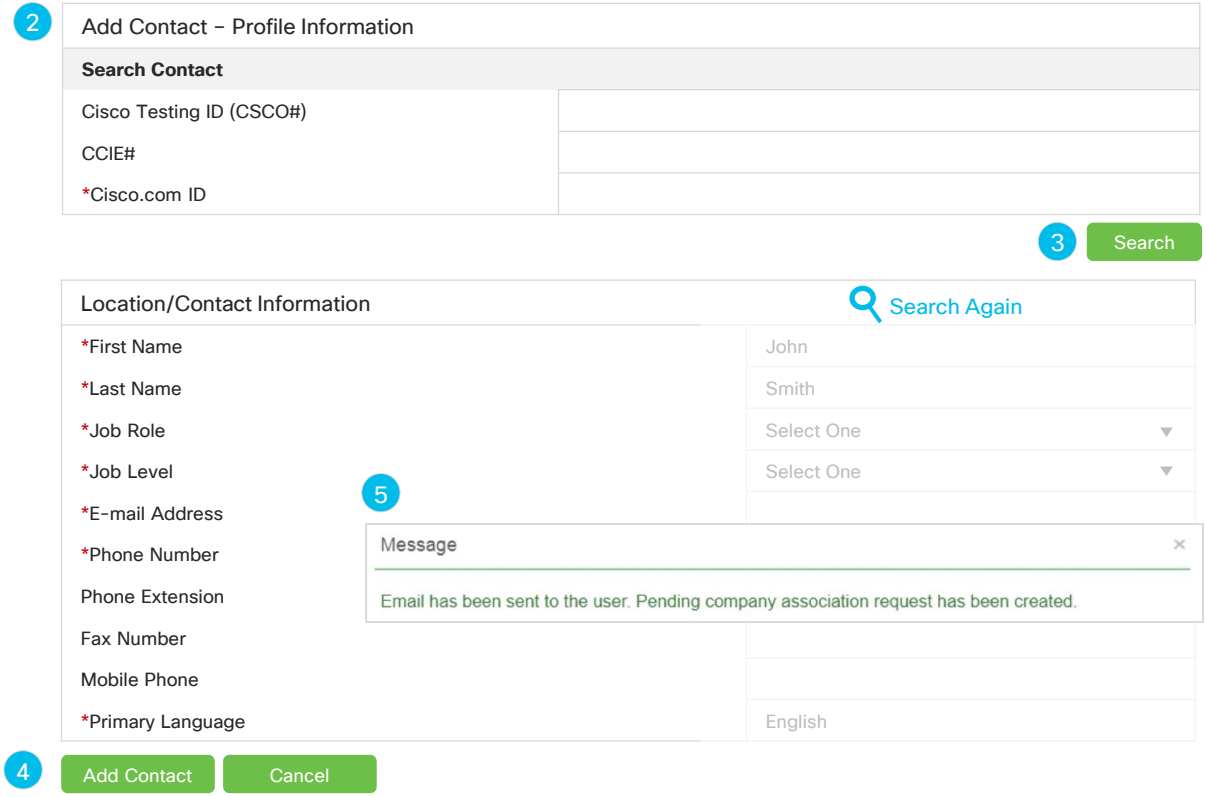
3. Click "Search" button. If the contact information is found, it will be displayed.

4. Click "Add Contact" to add the displayed contact information.

5. When the form has been submitted, a confirmation message will be displayed indicating that the contact has been notified about their company association.

   When the contact confirms association, their Cisco.com ID will be assigned a Partner User access level and will be able to perform the tasks outlined on the User Definitions page.

Add Contacts - Continued



Only PSS Administrator can complete this task:

Click on task: Contact Management

1. Clicking on any contact name will open a pop-up menu with their profile details. Here you can review and update their profile. You should be able to review and update the contact's Basic Information. Please ensure a valid corporate email domain is used for the Business Email address.
2. Review the contact's location
3. By clicking the "Submit" button, you can update the user's Basic Information
4. If available, add Cisco Testing ID for the contact and click "Submit"

Edit Contacts

Profile Information

1

Basic Information	
*First Name Tom	*Last Name Smith
*Business E-mail Tom_smith@partner123.com	Mobile Phone 408-555-1212
Fax Number null	*Company Phone Number 415-123-3456
*Job Level Executive	*Job Role Executive Management
*Primary Language English	

2

Business Address	
Partner Name	Partner123
Business Address	9000 Catalyst Way
City	San Jose
State/Province	CA
Country	United States
Postal Code	95131

3 Submit

Cisco Testing Information	
If you have passed any certification exams, enter your CSCO number. To ensure that this certification is entered correctly, make sure the first and last name in your profile matches the name on the test. Click here to find your testing information.	
Cisco Testing ID (CSCO#) If you have more than one CSCO#, click here.	Cisco Testing ID (CSCO#) (For example: CSCO12345678)

4 Submit

Only the **PSS Administrator** can complete this task:

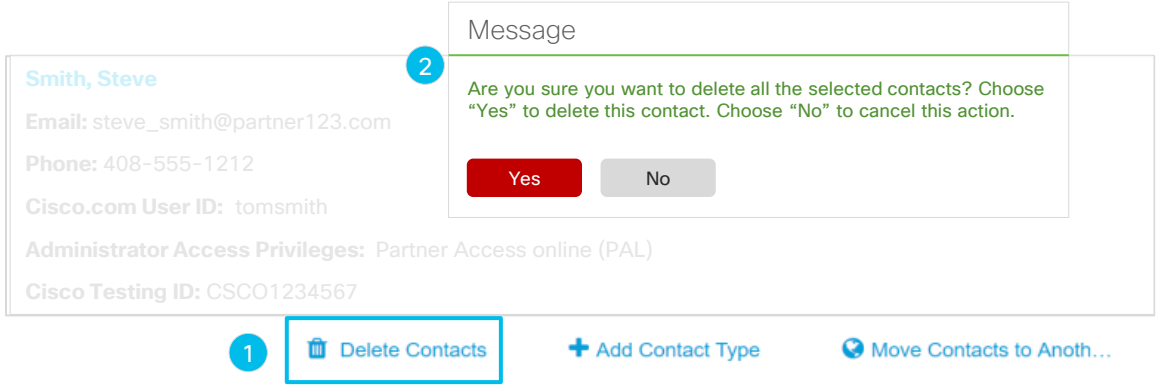
Click on task: Contact Management

1. Click the "Delete Contacts" icon

2. A pop-up window will appear asking to confirm the delete action, Upon deleting the contact association from the company, the contact's cisco.com user ID will be downgraded to Guest User status. Refer to the User Definitions page for more information.

Note: When removing association for a contact or association has been removed by the contact AND user had BID(s) and/or commerce ordering access on their profile, please open "CCO ID Profile Update" case on Customer Service Hub to request to have BID(s) and/or commerce ordering access removed from the user profile. This will ensure the user no longer has access to them.

Delete Contacts



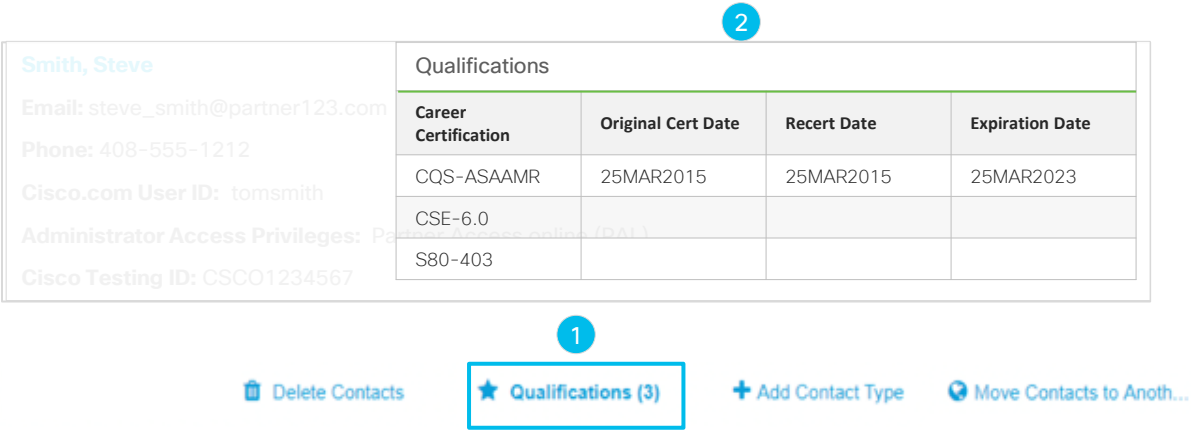
Only PSS Administrator can complete this task:

Click on task: Contact Management

1. Click the "Qualifications" icon. This icon will appear if a Cisco Testing ID has already been added to the contacts profile

2. A pop-up window will appear that provides details regarding Career Certifications, Certification Date, Recertified Date, and Expiration Date where applicable

View Career Certifications



Additional Information

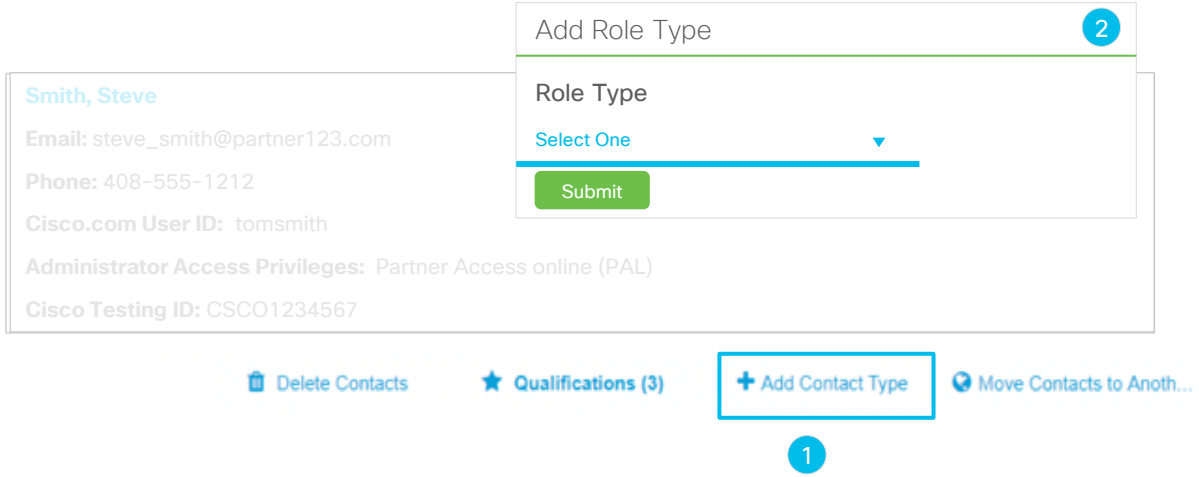
Exam expiration dates may not be applicable for specific Partner Specializations and Authorizations. Some old exams may still qualify a candidate for a role even if the exam has been refreshed with a new number or replaced outright by another exam. Please refer to the applicable program requirement document for details on the Channel Partner Program website

Only PSS Administrator can complete this task:

Click on task: Contact Management

1. Click the "Add Contact Type" icon
2. A pop-up window will appear to select the applicable "Contact Type" from the drop-down menu

Add Contact Type

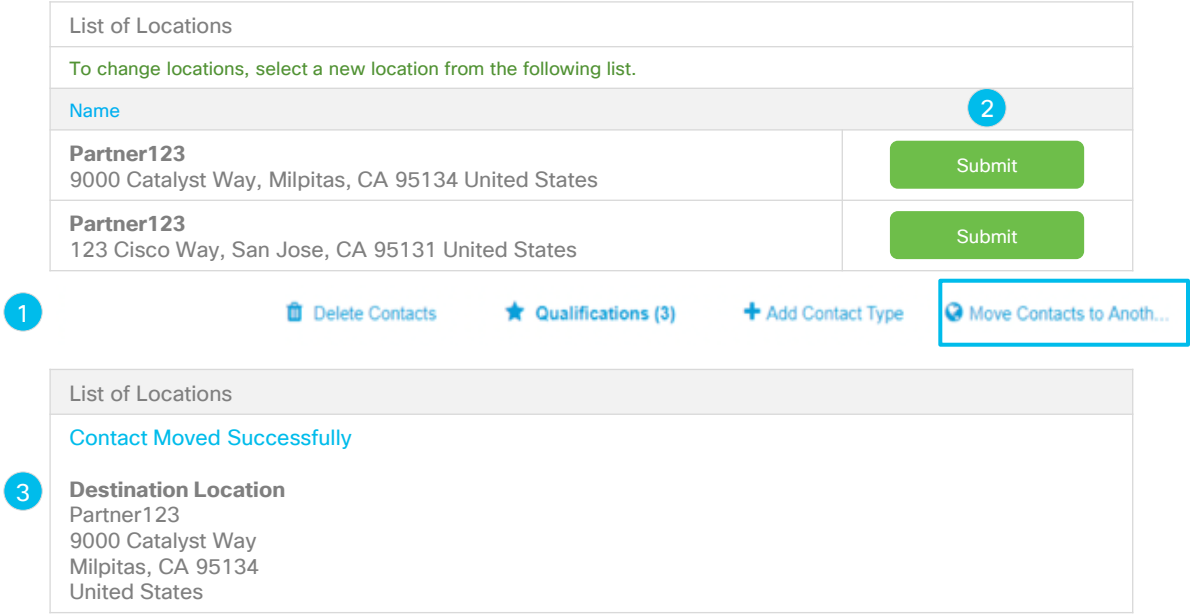


Only PSS Administrator can complete this task:

Click on task: Contact Management

1. Click the "Move Contacts to Another Location" icon under the contact you would like to move
2. A pop-up window will appear with all registered locations for the chosen company. When you have decided which location to assign the contact to, click the "Submit" button
3. You will receive a message indicating that the move was completed successfully

Move Contacts to Another Location

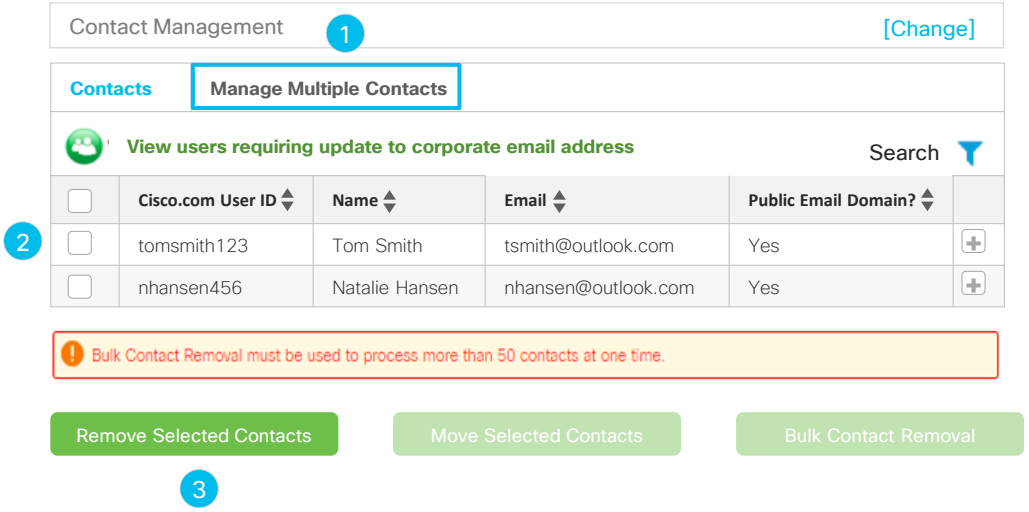


Only PSS Administrator can complete this task:

Click on task: Contact Management

1. Click "Manage Multiple Contacts" tab. Here you can remove, move, or do bulk contact removals
2. Select the Cisco.com User IDs you would like to manage, then you can select from the following three buttons to complete your request.
3. Click the appropriate button to complete the request:
   - Remove Selected Contacts *(Proceed to Steps 4 - 6 for additional steps)*
   - Move Selected Contacts *(Proceed to Step 9 -12 for additional steps)*
   - Bulk Contact Removal (Used only with 50+ contacts)

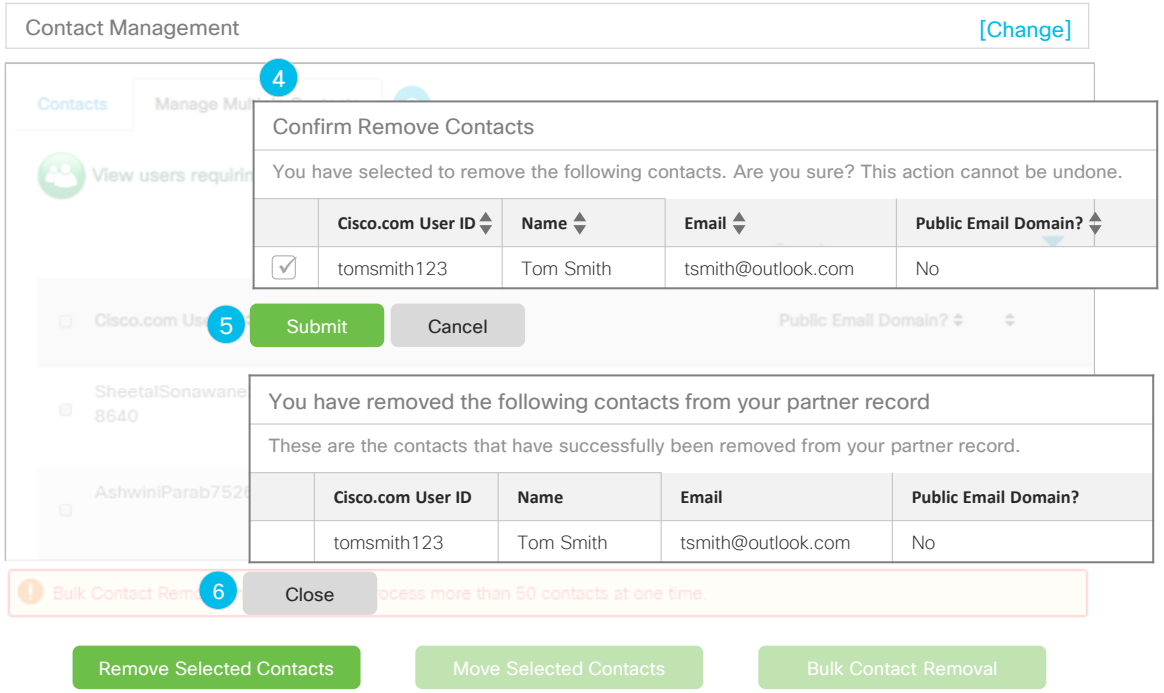
Remove and Move Contacts to Another Location for Multiple Contacts



Only PSS Administrator can complete this task:

4. If you selected the option to "Remove Selected Contacts", a pop menu will appear asking you to confirm the removal of the contacts
5. Click the "Submit" button to confirm your selection
6. You will receive a confirmation that your selected contact has been removed. Click the "Close" button to confirm your selection.

Remove and Move Contacts to Another Location for Multiple Contacts – Continued



Only PSS Administrator can complete this task:

7. If you selected option to "Move Selected Contacts", the system will ask you to choose your desired location if there are multiple locations.

8. If there are multiple locations, the system will ask you to choose your desired location. Click the "Select" button to submit your choice, proceed to step 9

Remove and Move Contacts to Another Location for Multiple Contacts – Continued

7

	Cisco.com User ID	Name	Email	Public Email Domain?	
☑	tomsmith123	Tom Smith	tsmith@partner987.com	No	+
☑	nhansen456	Natalie Hansen	nhans@partner456.com	No	+
☐	Jrosado329	Je Rosado	jrosad@partner123.com	No	+

Max of 50 contacts per submission can have their association removed or their location updated.

Remove Selected Contacts | Move Selected Contacts | Bulk Contact Removal

8

Move Selected Contacts – Select Location

Please select the location under which you would like to move the selected contacts

Site Name	Action
Partner123_SanJose	Select
Partner123_Milpitas	Select

Cancel

Only PSS Administrator can complete this task:

9. You will be presented with a pop-up confirmation screen
10. Click the "Confirm" button to submit your request
11. A pop-up screen will appear confirming your request. Click the "Close" button

Remove and Move Contacts to Another Location for Multiple Contacts - Continued

9

Move Selected Contacts – Confirmation

You are about to move the following contacts to the Partner123_SanJose location. Click "Confirm" to complete the operation or "Cancel"

	Cisco.com User ID	Name	Email	Public Email Domain?
☑	tomsmith123	Tom Smith	tsmith@partner987.com	No
☑	nhansen456	Natalie Hansen	nhans@partner456.com	No

10 Confirm | Select Another Location | Cancel

11

Move Selected Contacts – Confirmed

Congratulations! You have successfully moved the following contacts to the "Partner123_SanJose" location

Cisco.com User ID	Name	Email	Public Email Domain?
tomsmith123	Tom Smith	tsmith@partner987.com	No
nhansen456	Natalie Hansen	nhans@partner456.com	No

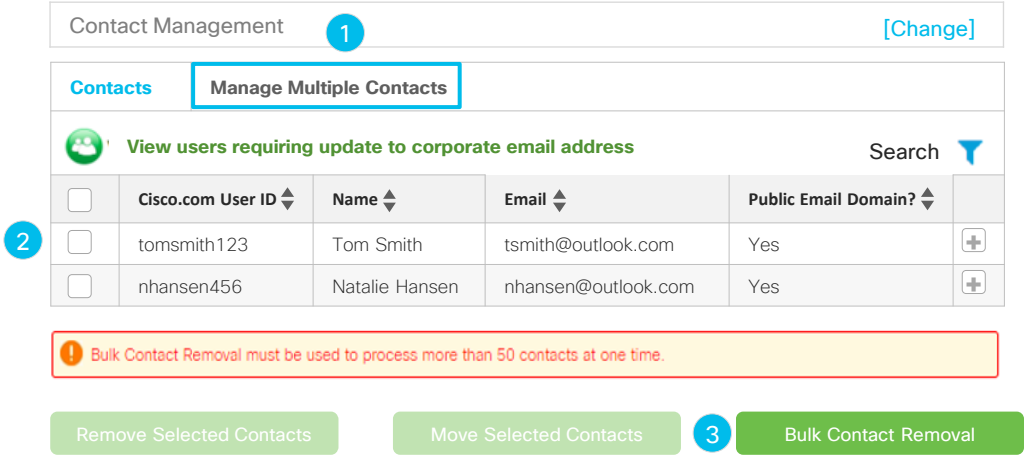
Close

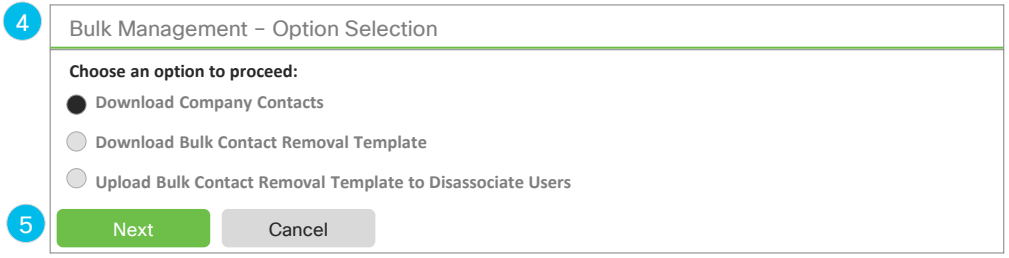
Only PSS Administrator can complete this task:

Click the task: Contact Management

1. Click "Manage Multiple Contacts" tab. Here you can do bulk contact removals.
2. Select the "Cisco.com User IDs" you would like to manage
3. Click the "Bulk Contact Removal" button
4. A pop-up menu will appear that provides you with three options:
   - Download company contacts. This will download an Excel (.xls, .xlsx, .csv) with all your contact details
   - Download Bulk Contact Removal template. This Excel (.xls, .xlsx, .csv) template can be used to upload the contacts which he wants to upload
   - Upload Bulk Contact Removal template to disassociate users (.xls, .xlsx, .csv)
5. Make your selection, click the "Next" button

Bulk Contact Removal

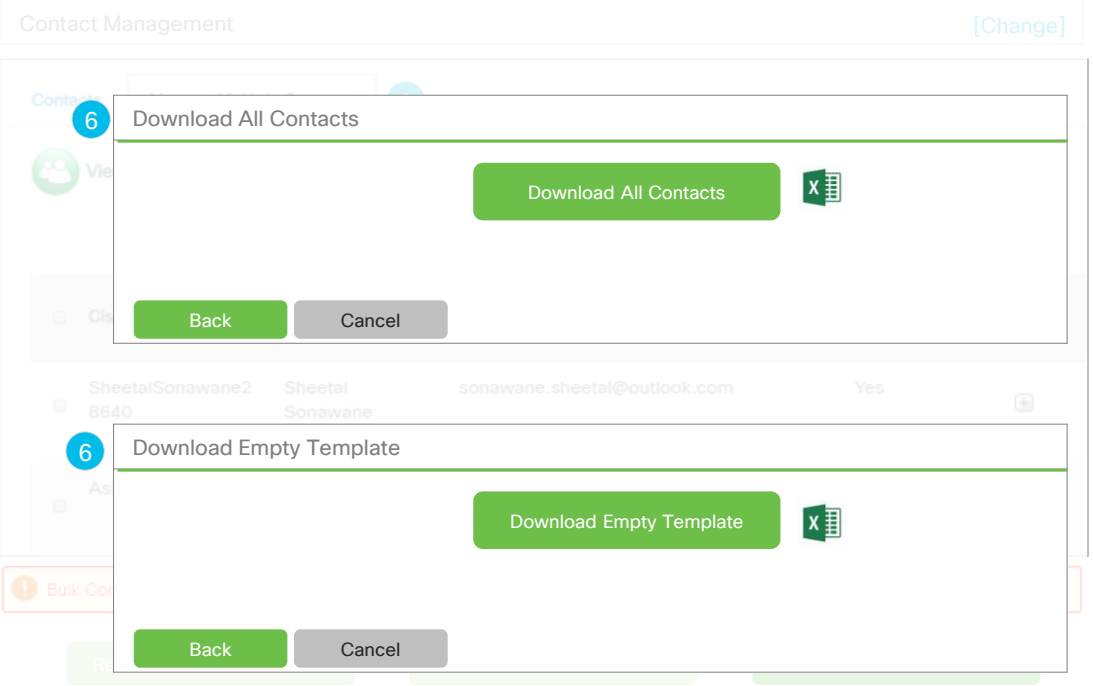




Only PSS Administrator can complete this task:

6. Depending on your selection, you will be presented with these pop-up screens:
   - Download company contacts. This will download an Excel (.xls, .xlsx, .csv) with all your contact details
   - Download Bulk Contact Removal template. This Excel (.xls, .xlsx, .csv) template can be used to upload the contacts which he wants to upload. Once you populate this document, then you can upload it, see steps on the next page.

Bulk Contact Removal - Continued



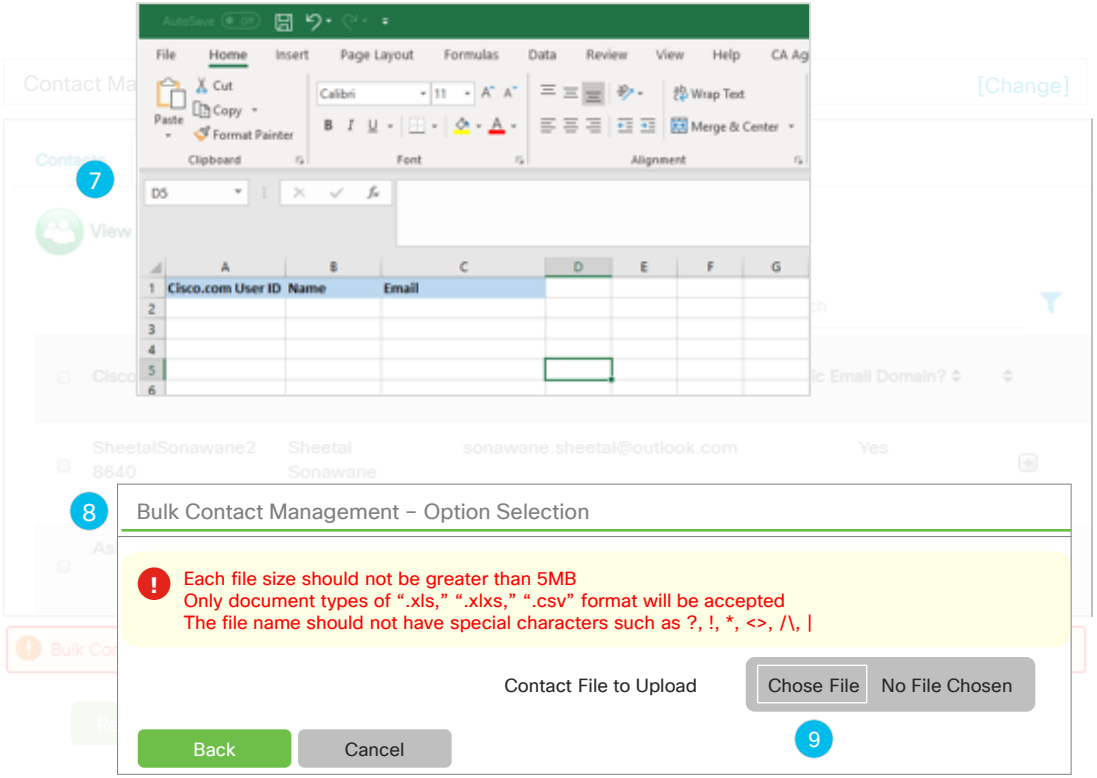
Only PSS Administrator can complete this task:

7. Using the Bulk Contact Management template that you just downloaded, enter all the Cisco.com User IDs you would like to disassociate from your company (Your limit is up to 50 IDs), then save to your desktop

8. From the "Bulk Contacts Management – Option Selection" select the "Upload Bulk Contact Removal" template to disassociate users.

9. Click "Choose File" to locate file on your desktop to upload. You will be prompted to choose the saved file from your desktop.

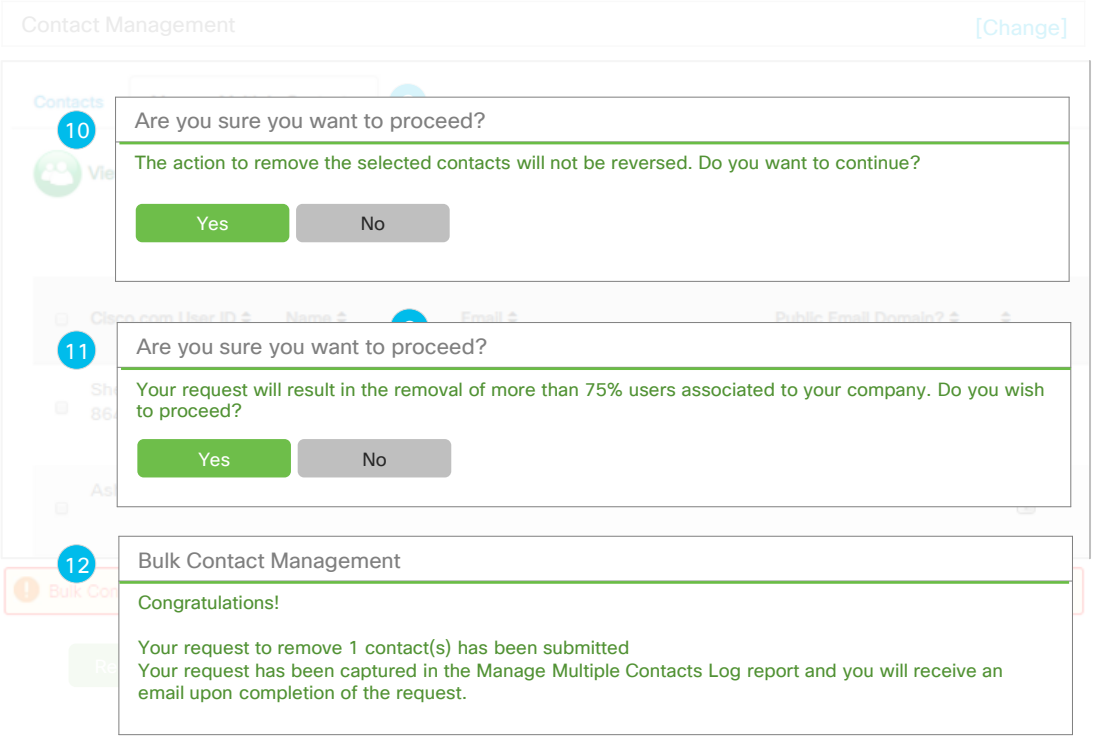
Bulk Contact Removal - Continued



Only PSS Administrator can complete this task:

10. Once the system has received the file, you will be prompted to confirm by selecting the "Yes" button
11. If you would like to delete more than 75% of your contacts, once uploaded, you will be prompted with a screen asking if you would like to proceed.
12. By clicking the "Yes" button, you will receive a confirmation screen

Bulk Contact Removal - Continued



Manage Access Requests

Click to Navigate to Work Instructions

Association Requests

Why this is Important:

This section demonstrates how to approve or deny association requests that are initiated by employees or other PSS Administrators at your company.

Click to navigate to:

Only PSS Administrator can complete this task:

Click on task: Association Requests

1. Click on "Employee Initiated Requests" tab to display requests
2. Select the contact whose Association Request you would like to approve or deny
3. Review and click "Approve" or Deny" button to process your request, proceed to step 4

Why do I need to do this?

The process of approving any requests for association with your company lies solely with you. It is up to you to validate that the user is affiliated with your company and to ensure their email domain is your corporate address. To approve associations, select one or more checkboxes for each pending request and choose "Approve".

Employee Initiated

Association Requests

1 Employee Initiated Requests | PSS Administrator Initiated Requests

These are requests initiated by an employee of a PSS Administrator from your company in your selected country.

- To approve a request, choose a contact and click on "Approve" button, confirm and submit
- To deny a request, choose a contact and click on "Deny" button, provide the reason of denial and submit
- If you are a Group Administrator for multiple countries, click **"select geography"** (only viewable by Group Administrator) to change countries

Search

2

	Name	Partner Name	Email	Cisco.com User ID	Location Address	Status	Days Pending
☐							
☑	Smith, John	Partner123 (US)	jsmith@partner123.com	jsmith123	Site address	Pending	19
☐	Ng, Charles	Partner123 (US)	C_ng@partner123.com	cng4567	Site address	Pending	5

3 Approve | Deny

Only PSS Administrator can complete this task:

4. Review contact details
5. If you wish to remove any requests, unselect the appropriate checkboxes
6. Click the "Submit" button to process your request or click the "Cancel" button to return to the previous screen. The next page will display all the requests you have selected for final review.

Employee Initiated (Approval)

Association Requests

Employee Initiated Requests | PSS Administrator Initiated Requests

These are requests initiated by an employee of a PSS Administrator from your company in your selected country.

- To approve a request, choose a contact and click on "Approve" button, confirm and submit.

Request Approved

You are approving the following contact(s) association with your company. Choose "Submit" to continue.

Search

	Name	Email	Cisco.com User ID	Location Address
4 ☐				
5 ☑	Smith, John	jsmith@partner123.com	jsmith123	Partner123 9000 Catalyst Way Milpitas, CA 95134 United States

6 Submit Cancel

Only PSS Administrator can complete this task:

7. A pop-up screen will appear confirming the association requests that have been approved. Proceed to step 8 for the steps to deny a request.

Employee Initiated (Approval) - Continued

Association Requests

Employee Initiated Requests | PSS Administrator Initiated Requests

These are requests initiated by an employee of a PSS Administrator from your company in your selected country.

- To approve a request, choose a contact and click on "Approve" button, confirm and submit.

7

Request Approved

You have approved the following contact(s) association requests. A notification email has been sent to each individual.

Search

Name	Email	Cisco.com User ID	Location Address
Smith, John	jsmith@partner123.com	jsmith123	Partner123 9000 Catalyst Way Milpitas, CA 95134 United States

View All Employee Initia...

Only PSS Administrator can complete this task:

8. If you selected the "Deny" button in step 3, a pop-up screen will appear confirming the association requests that have been denied
9. Select a reason from the drop-down menu provided for each denied request
10. Click the "Submit" button to process your request or click the "Cancel" button to return to the previous screen.

Employee Initiated (Denial)

Association Requests

Employee Initiated Requests | PSS Administrator Initiated Requests

These are requests initiated by an employee of a PSS Administrator from your company in your selected country.

- To approve a request, choose a contact and click on "Approve" button, confirm and submit

8

Request Denied

You have denied the following contact association with your company. For each individual, select a reason for denial from the drop-down menu and choose "Submit"

Search

Name	Email	Cisco.com User ID	Location Address	Reason 9
Smith, John	jsmith@partner123.com	jsmith123	Partner123 9000 Catalyst Way Milpitas, CA 95134 United States	No longer an employee associated with this company Does not need partner level access Already has partner level access with same ID Already has partner level access with different ID Other

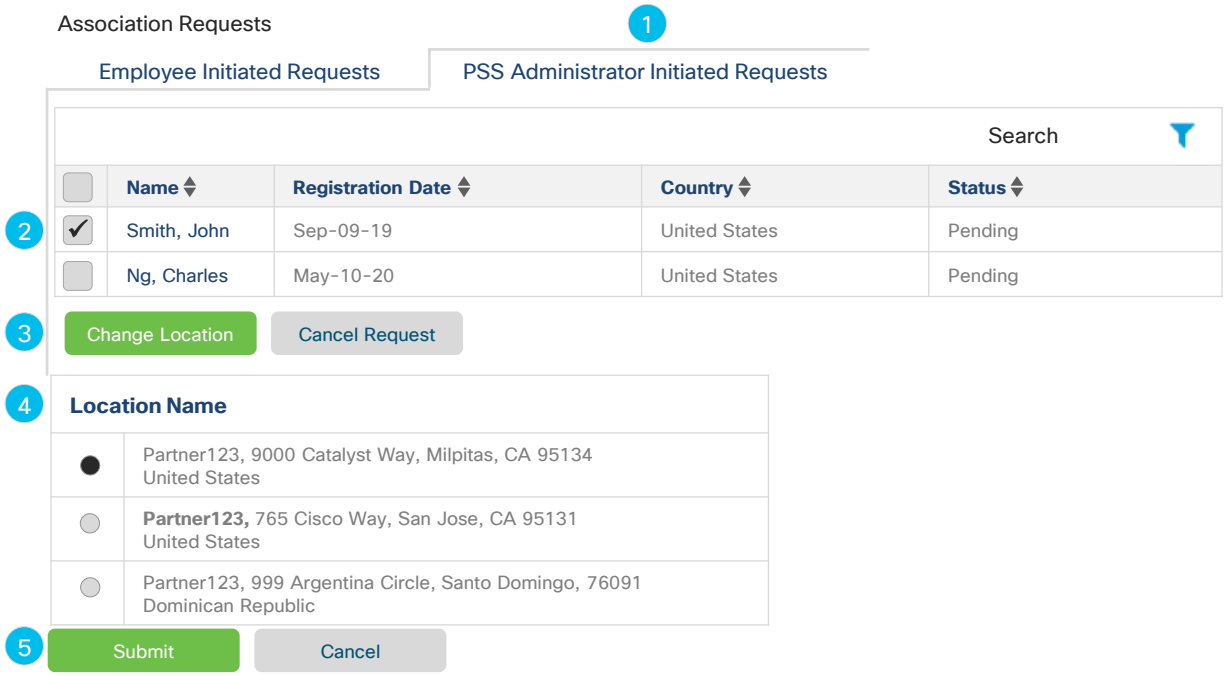
10 Submit Cancel

Only PSS Administrator can complete this task:

Click on task: Association Requests

1. Click on "PSS Administrator Initiated Requests" tab to display all Initiated requests
2. Select the contact who you would like to "Change Location" or "Cancel Request" for
3. Click the "Change Location" button to process your request
4. A pop-up window will appear, select the preferred location
5. Click the "Submit" button to change the contact's site location, or the "Cancel" button to cancel your request. Proceed to step 6.

PSS Administrator Initiated Requests to Change Location or Cancel



Only PSS Administrator can complete this task:

6. A pop-up screen will appear confirming that the location for the contact's association has been moved successfully. The contact will be mapped to the new location within 24-hours.

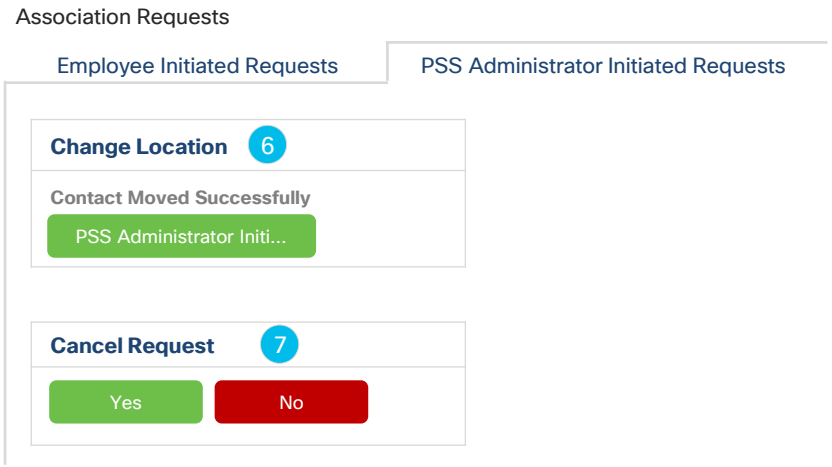
7. A pop-up screen will appear. Click the "Yes" button to remove the record from the list. Click the "No" button to cancel request

Important

This request will stay in a pending status waiting for the contact to approve.

The contact can approve the association request via the email they received, or when accessing the Partner Self Service application, they will be prompted to approve or deny the request.

PSS Administrator Initiated Requests to Change Location or Cancel - Continued



Access Management

Why this is Important:

This section will cover the steps to request, manage and remove access to specific Cisco tools such as Partner Program Enrollment (PPE), and Program Management & Application (PM&A) and Partner Self Service (PSS) along with other functions.

Note: Refer to Advanced Access Management section for help with PXP, DLSE, or Enterprise Agreement Management Portal (EAMP) access.

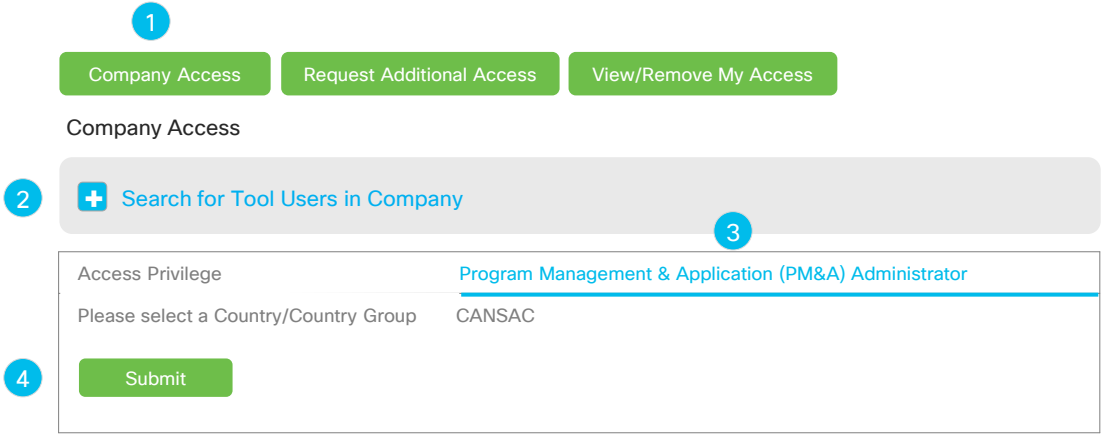
Click to navigate to:

Only PSS Administrator can complete this task:

Click on task: Access Management

1. Click on "Company Access" to search for tool users in your company, to search for an individual, and view all contact access
2. Click on "+" icon to expand section and search. In this example, the user will be searching for tool users in their company.
   - Click here to see example of searching for access for specific individual
   - Click here to see example of searching for access for all contacts for the company
3. Click the "All Types of Partner Administrators" pull down menu
4. Click the "Submit" button to search for the contacts who have been assigned access to this tool. In this example, it is the PM&A Administrator tool. See next page on additional steps for how PSS administrator can edit access

View and Edit Company Access (Search for Tool Users in Company Example)



Only PSS Administrator can complete this task:

5. To edit access, click the "Add/Remove Access" button
6. A pop-up screen will appear, un-check / check the checkboxes in order to revoke or grant access to selected tool Country / Country Group
7. Click the "Next" button, proceed to step 8

View and Edit Company Access (Search for Tool Users in Company Example) - Continued

Search for an Individual

View all Contact Access

Contacts		
Johnson, Tom (CANSAC)		Add / Remove Access
Tool	**Access Level**	**Country/Country Groups**
Program Management & Application (PM&A) + Partner Program Enrollment (PPE)	Administrator	CANSAC
Channel Partner Tools	Cisco.com Partner Level Access	Automatic access granted from company association

5

Editing Access For: Tom Johnson

Invitation Programs Application — Access Level: Administrator

Program Management & Application (PM&A) + Partner Program Enrollment (PPE) — Access Level: Administrator

6 For the checkboxes that appear:
Uncheck any items to remove access or check any items to grant access, and click "Next."

☑ CANSAC bution.

7 Next | Reset

Only PSS Administrator can complete this task:

8. A pop-up screen will appear where you can enter your comments for adding or revoking access.

9. Click the "Submit" button to remove access privileges. A confirmation screen will appear.

View and Edit Company Access (Search for Tool Users in Company Example) - Continued

8

Confirm – Program Management & Application (PM&A) + Partner Program Enrollment (PPE)

You are about to **REMOVE** the following access privileges:

Country/Country Group: CANSAC

Please enter your comments for this update (Max 300 characters). These comments will be included in the email sent to notify this individual of these access changes

9

Submit | Cancel

Only PSS Administrator can complete this task:

Click on task: Access Management

1. Click on "Company Access" to search for tool users in your company, to search for an individual, and view all contact access
2. Click on "+" icon to expand section and search. In this example, the user will be searching for specific individual in their company..
3. Click the "Search for an Individual" pull down menu. User can search by a variety of criteria such as: Cisco.com User ID; Email Address; First Name; or Last Name
4. After you have entered search criteria, click the "Submit" button. See next page on additional steps for how PSS Administrator can edit access

View and Edit Company Access (Search for an Individual Example)

1

Company Access | Request Additional Access | View/Remove My Access

Company Access

2 Search for an Individual

3

The search will be based on exact matches. For example: If you enter "Jonson" in the Last Name, it will not show "Johnson." You must correctly enter the entire word.

Cisco.com ID

OR

Email Address

OR

First Name (optional)

Last Name

4 Submit

Only PSS Administrator can complete this task:

5. Click "Add/Remove Access" button
6. A pop-up screen will appear, uncheck / check the checkboxes in order to revoke or grant access to selected tool Country / Country Group
7. Click the "Next" button to receive confirmation of removal, then proceed to step 8.

View and Edit Company Access (Search for an Individual Example) - Continued

Search for an Individual

View all Contact Access

Contacts		
Johnson, Tom (CANSAC)		Add / Remove Access
Tool	**Access Level**	**Country/Country Groups**
Program Management & Application (PM&A) + Partner Program Enrollment (PPE)	Administrator	CANSAC
Channel Partner Tools	Cisco.com Partner Level Access	Automatic access granted from company association

5

6

Editing Access For: Tom Johnson

Invitation Programs Application — Access Level: Administrator

Program Management & Application (PM&A) + Partner Program Enrollment (PPE) — Access Level: Administrator

For the checkboxes that appear:
Uncheck any items to remove access or check any items to grant access and click "Next."

☑ CANSAC bution.

7

Next | Reset

Only PSS Administrator can complete this task:

8. A pop-up screen will appear where you can enter your comments for adding or revoking access.

9. Click the "Submit" button to remove access privileges. A confirmation screen will appear.

View and Edit Company Access (Search for an Individual Example) - Continued

8

Confirm – Program Management & Application (PM&A) + Partner Program Enrollment (PPE)

You are about to **REMOVE** the following access privileges:

Country/Country Group: CANSAC

Please enter your comments for this update (Max 300 characters). These comments will be included in the email sent to notify this individual of these access changes

9

Submit | Cancel

Only PSS Administrator can complete this task:

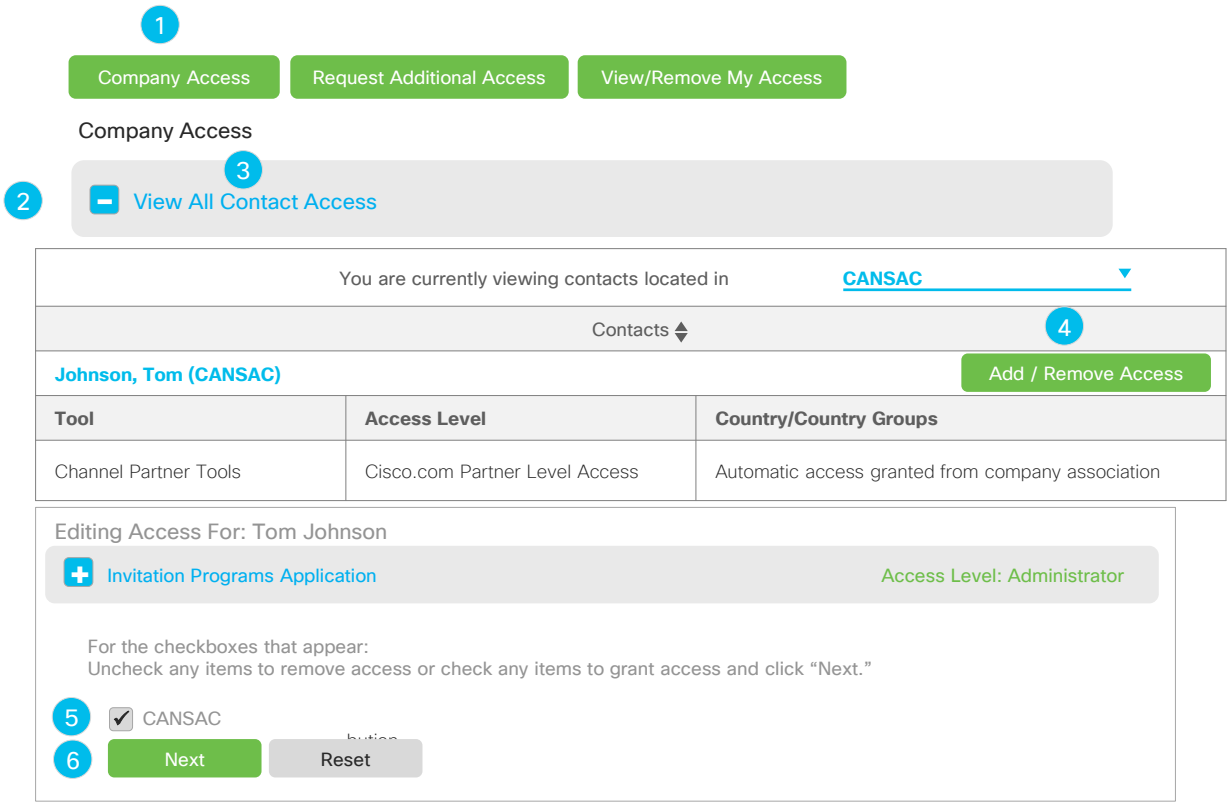
Click on task: Access Management

1. Click on "Company Access" to view all contacts who are associated with the PSS Administrator in specific locations
2. Click on "+" icon to expand section and search. In this example, the user will be searching for all contact access in their company.
3. Click the "View All Contact Access" link. Here a list of all contacts for this location along with their access levels will be displayed at the bottom of the page

Only PSS Administrator can complete the remaining tasks 4-8:

4. Click the "Add/Remove Access" button
5. A pop-up screen will appear, uncheck / check the checkboxes in order to revoke or grant access to selected tool Country / Country Group
6. Click the "Next" button to receive confirmation of removal, proceed to step 7

View and Edit Company Access (View All Contact Access)

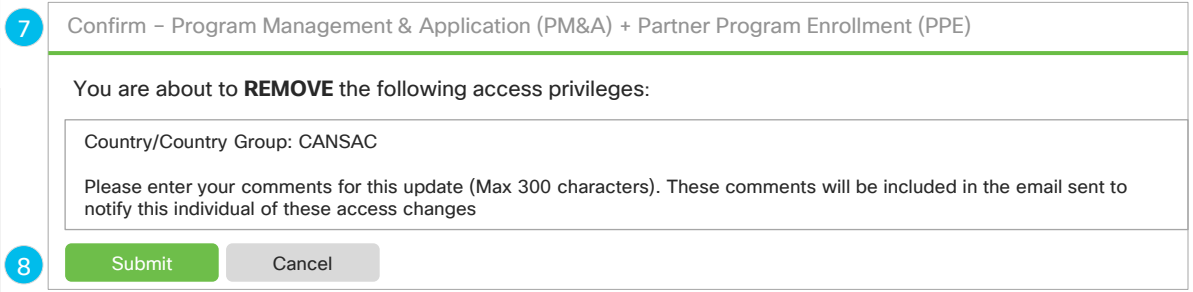


Only PSS Administrator can complete this task:

7. A pop-up screen will appear where you can enter your comments for adding or revoking access

8. Click the "Submit" button to remove access privileges

View and Edit Company Access (View All Contact Access) - Continued



Only Partner User and PSS Administrator can complete this task:

Click on task: Access Management

1. Click on "Request Additional Access"
2. Select the Tool you need access to from the drop-down menu, and the Country/Country Group
3. Review and click "Submit" button
4. Filter results. To request access, please contact via email any of the individuals listed

Why do I need to do this?

- To obtain additional tool/application access, you must contact the tool/application administrator directly to request access
- If your tool is not listed in the drop-down menu, contact your PSS Administrator

Request Additional Access

1

Company Access | Request Additional Access | View/Remove My Access

Request Access

To request access to additional partner tools, you will need to contact your company's partner administrator. Select the tool you need access to from the pull-down menu and your company's list of partner administrators will be displayed.

2 **Select the tool you need access to:** Select One

Please select a Country/Country Group: United States

3 Submit

4

Please contact any of the individual(s) listed below to request access. Search

Admins
Baker, Nicky (United States) Nicky_baker@partner123.com
Smith_John (France) John_Smith@partner123.com

4

Only Partner User and the PSS Administrator can complete this task:

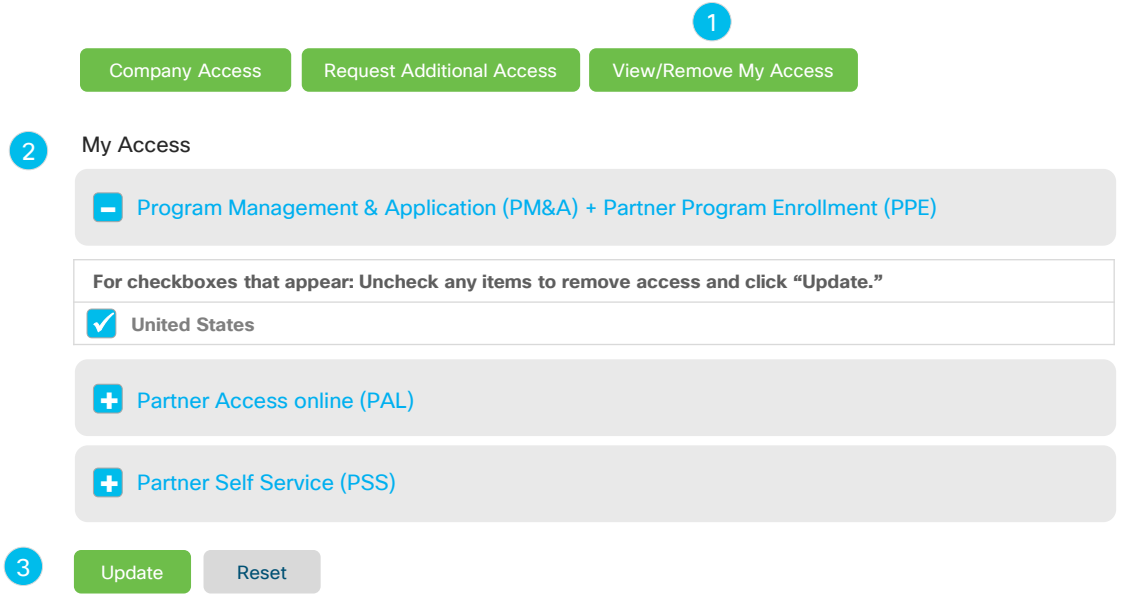
Click on task: Access Management

1. Click on "View/Remove My Access" to view tools you have access to in an expandable format
2. Click on "+" icon to expand section and edit tool access level. Uncheck the countries where you want to remove access for that tool
3. Review and click "Update" button

Why do I need to do this?

In order to be able to facilitate certain functions, the Partner Administrator must have access to specific tools. (i.e. Assign rebate coordinator, enroll into programs, etc.)

View / Remove My Access



Only Partner User and the PSS Administrator can complete this task:

Click on task: Access Management

1. Click on the "Request Additional Access" Note: Requesting Additional Access area just allows users to locate their administrator(s). Administrator(s) still need to be contacted directly for help with any additional access.
2. Select "Partner Self Service (PSS)" next to tool you need access to.
3. Select your country/country group
4. Click "Submit"
5. List of Partner Self Service (PSS) admins will display. Contact admin(s) for any additional access needed. Email option is provided to help with contacting an admin

Locate My PSS Administrator

1

Company Access | Request Additional Access | View/Remove My Access

Request Additional Access

To request access to additional partner tools, you will need to contact your company's partner administrator. Select the tool you need access to from the pull-down menu and your company's list of partner administrators will be displayed. Contact your Partner Self Service (PSS) administrator for requesting access to any tools not listed.

Select the took you need access to: 2 Partner Self Service (PSS)

Please select a Country/Country Group: 3 GULF

4 Submit

5 Please contact any of the individual(s) listed below to request access.

Administrator(s)
Smith, John (GULF) John@ciscopartner.com GULF
Hansen, Natalie (GULF) Natalie@ciscopartner.com GULF

Advanced Access Management

Why this is Important:

This portal allows you to add, manage, or remove your team's access to PXP, EAMP, DLSE, and CCW (only Direct Partners and Distributors)

Click to navigate to:

Work Instructions

Only PSS Administrator can complete this task:

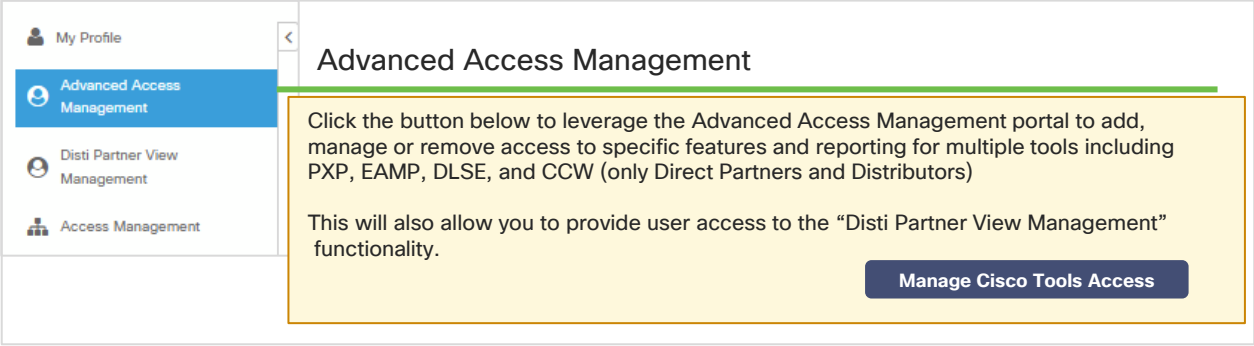
Click on task: **Advanced Access Management**

For detailed process steps, the following guide should be referenced:

PSS Advanced Access Management guide for:

- Partner Experience Platform (PXP)
- Enterprise Agreement Management Platform (EAMP)
- Digital Lifecycle Selling Experience (DLSE)
- Cisco Commerce Workspace (CCW) – *Only Direct Partners and Distributors*

Advanced Access Management



Global Administrator Access

Why this is Important:

If you have a presence in other countries, being able to administrate the information will become very important when you enroll into rebate programs.

Click to navigate to:

Work Instructions

Only **PSS Administrator** can complete this task:

Click on task: Manage Global Administrator Access

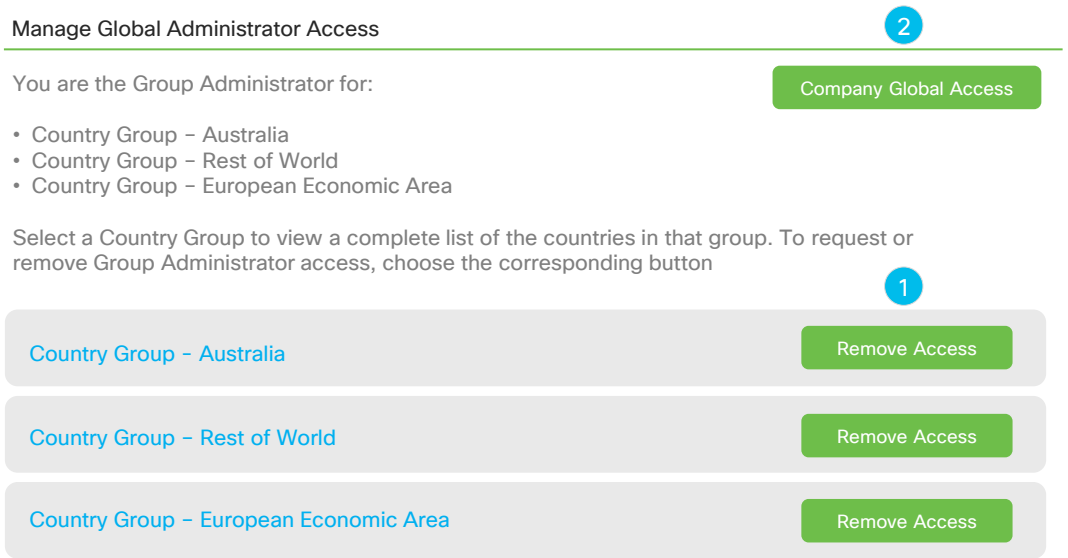
1. Click on "Remove Access" button to remove your global access to a specific country group
2. To manage the Global Access of your company employees, click on the "Company Global Access" button to view employees and their access levels, then proceed to step 3

Important

If you do not see all countries for your country group, you may be experiencing a company mapping issue. Please open a case with Cisco support to resolve this issue.

If you do not have a designated Global Administrator for your company open a case with Cisco support to resolve this issue.

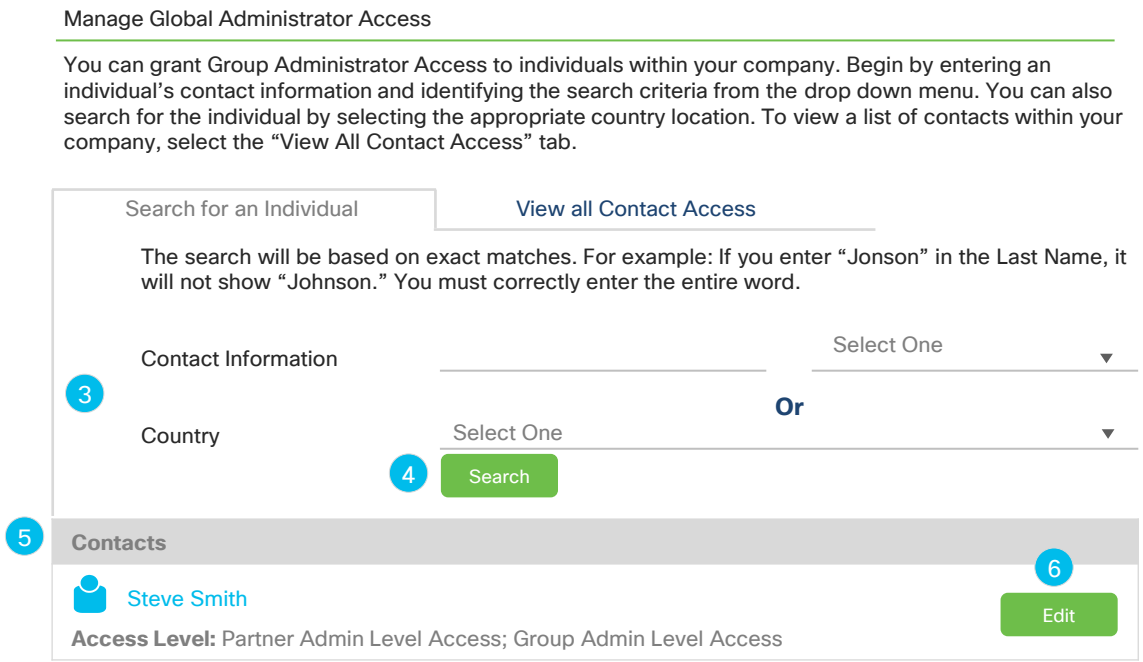
Manage Global Administrator Access



Only PSS Administrator can complete this task:

3. Choose any of the search options presented, then enter your criteria
4. Click the "Search" button to display your contacts and their access levels
5. Your search results will be displayed
6. Click the "Edit" button next to each contact to update their global access

Manage Global Administrator Access - Continued



Accountable Program Contacts

Why this is Important:

Managing the contacts for your company is one of the most critical steps to ensure that you receive vital information that may benefit your company. For example, if a rebate coordinator is not assigned to the programs for which you are enrolled and participate in, you will not receive claim notifications and can potentially forfeit your earned rebates.

Click to navigate to:

Role Definitions

Before getting started with managing the accountable contacts for your company, it is important to understand which roles are responsible for certain activities. Below are four key roles that must be managed on a regular basis to ensure that you receive timely information.

Rebate Coordinator

- Receives Global EasyPay claim notifications with security PIN to process earned rebates for the Programs and incentives where you are enrolled.
- The PSS Administrator and the Payment Administrator must assign at least one per each applicable program of which you are enrolled
- **Important:** This is the only role that can claim the rebate. Payments will not be sent, placed on hold, and possibly forfeited if this role is not assigned.

Payment Administrator

- Manages the assignment of the rebate coordinator (previously only managed by the PSS Administrator).
- The PSS Administrator and the payment administrator may assign up to two rebate coordinators, and is highly recommended
- **Important:** This role does not receive the rebate claim notification with the security PIN for rebate collection. They only assign the role of the rebate coordinator and copy contacts.

Copy Contacts

- Receives Global EasyPay claim notifications (without security PIN) regarding the payment period/process
- The PSS Administrator may assign up to three copy contacts. Assignment of more than one is highly recommended
- **Important:** This role does not receive the rebate claim notification with the security PIN They are only notified if a Rebate Coordinator is assigned.

Tool Access: Partner Experience Platform (PXP)

Overview: PXP allows users to manage and track performance and view program/incentive enrollments. For access, contact your PSS Administrator and refer to the PSS Advanced Access Management User Guide.

Access Management: When a PSS Administrator is assigning PXP access, Rebate Coordinators and Copy contacts can be granted access to the Payment Notification and Actions dashboard in PXP. This dashboard allows user to view and manage payments from Global Easy Pay (GEP).

Refer to the Global EasyPay Training and Documentation page to find the PXP Payment Notification user guide.

Only PSS Administrator and the Payment Administrator can complete this task:

Click on task: Accountable Program Contacts

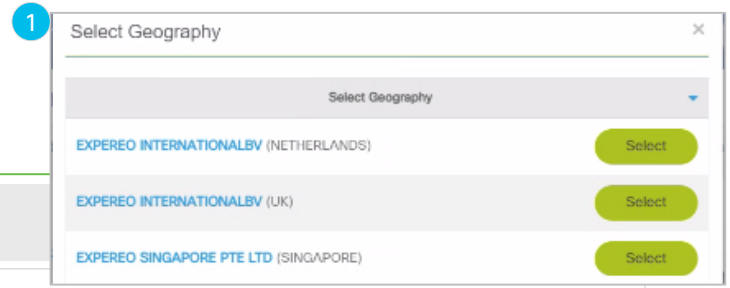
1. Select Geography from pop up menu. The options listed are based on country groups that you manage as a PSS Administrator or assigned to as a Payment Administrator.
2. Click on "Accountable Program Contacts" to expand and view the list of all assigned contacts for the selected Geography.
3. To delete an accountable contact and role, click on the "Delete" button next to assigned contact you
4. You will receive a confirmation message prompting you to choose your preferred action.

To Add Accountable Contact, proceed to steps here.

Why this is Critical

Managing the contacts for your company is one of the most critical steps to ensure that you receive vital information that may benefit your company. For example, if a rebate coordinator is not assigned to the programs for which you are enrolled and participate in, you will not receive claim notifications and can potentially forfeit your earned rebates.

View and Delete Contact



Accountable Program Contacts

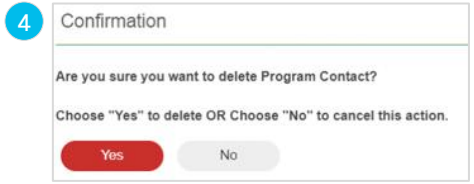
2 Accountable Program Contacts

The following contacts have been assigned for your company. To change the Accountable Contact and Role, click Delete.

Search

Name	Function	Role	Email	Action
Smith, Tom	Program - Cisco Services Partner Program	Copy Contact	Tom_Smith@partner123.com	3 Delete
Hansen, Natalie	Program - Value Incentive Program	Rebate Coordinator	Natalie_Hansen@partner123.com	Delete

Add Accountable Contact



Only PSS Administrator and the Payment Administrator can complete this task:

Click on task: Accountable Program Contacts

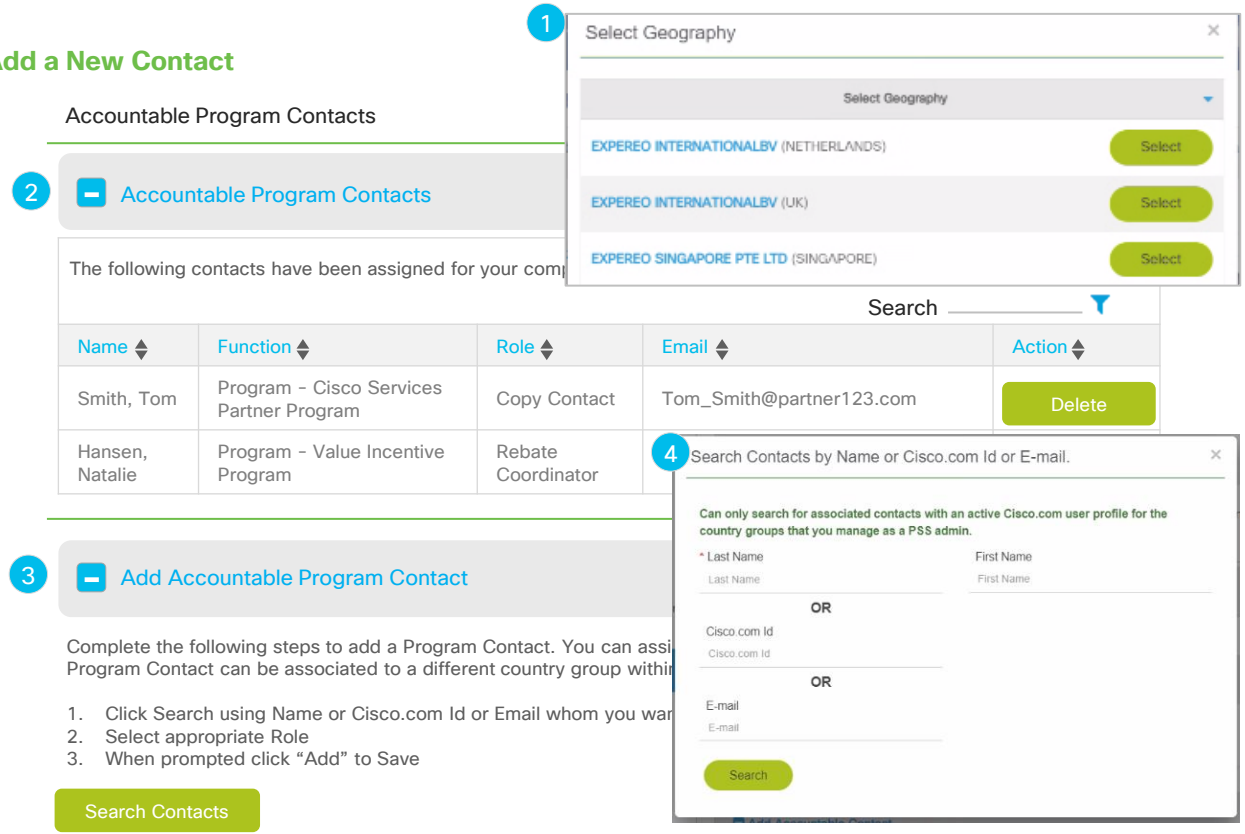
1. Select Geography from pop up menu. The options listed are based on country groups that you manage as a PSS Administrator or assigned to as a Payment Administrator.
2. Click on "Accountable Program Contacts" to expand and view the list of all assigned contacts for the selected Geography.
3. To add an accountable contact and role, click on "Add Accountable Program Contact", then click on "Search Contacts" button
4. In the pop-up screen, enter the Last Name, Cisco.com ID, or the email of the person you wish to locate, then click "Search" button. You can now search and add a contact that is associated to any country group that you manage within your company.

Proceed to Step 5

Important

- In order to assign specific roles such as: Copy contact, payment administrator, rebate coordinator, this step must be completed.
- If you want a contact to be assigned to multiple Program roles, you need to repeat steps to search and add contact for each role.

Add a New Contact



Only PSS Administrator and the Payment Administrator can complete this task:

5. Your search results will display, select the individual whom you would like to assign a specific program role to

6. Click radio button next to user and the "Select" button

Proceed to Step 7

Important

Once you select your preferred contact, the next sections will cover the steps to assign:
- Copy Contacts
- Rebate Coordinator
- Payment Administrator

Add a New Contact - Continued

Accountable Program Contacts

Add Accountable Program Contact

5

Search Results

CCO ID	Contact Region	Company Name	Company Name	Email
Partner123	Netherlands	Tom Smith	Partner123 International	tsmith@partner123.com

6 Select

Only PSS Administrator and the Payment Administrator can complete this task:

7. Choose the program role that you would like to assign your chosen contact to. Refer to the Role Definitions for more information

Proceed to Step 8

Important

As a reminder, you must assign at least one (up to two) rebate coordinators *for each applicable program.*

To view program enrollments, refer to the Partner Program Enrollment application

Add a New Contact – Continued (Rebate Coordinator Example)

Accountable Program Contacts

Add Accountable Program Contact

Search Contacts Hansen, Natalie

Business Address
456 Cisco Way
San Jose, CA
95131
United States

Role 7 **Select One**

- Copy Contact 1
- Copy Contact 2
- Copy Contact 3
- Payment Administrator
- Program Coordinator
- Rebates Coordinator 1
- Rebates Coordinator 2

Only PSS Administrator and the Payment Administrator can complete this task:

8. Check the box for the Program(s) you would like to assign your chosen contact and Program role to. Programs designated with a green check mark ✓ are the Programs where a designee has already been assigned. Their name will also appear as well.

9. Click the "Add" button to complete the assignment

If you would like to delete an assigned accountable contact and role, click here for steps

Important

It is highly recommended that you assign more than one rebate coordinator for each program that your company participates in. To assign a secondary one, select the role "Rebates Coordinator 2"

To view program enrollments, refer to the Partner Program Enrollment application

Add a New Contact – Continued (Rebate Coordinator Example)

Accountable Program Contacts

Add Accountable Program Contact

8

Search Contacts Hansen, Natalie

Business Address
456 Cisco Way
San Jose, CA
95131
United States

Role Rebates Coordinator 1

Function Program

- ✓ Value Incentive Program (Natalie Hansen)
- ☐ Cisco Services Partner Program
- ✓ Cisco Rewards (Natalie Hansen)
- ☐ Perform Plus
- ☐ Lifecycle Incentives

9 Add

Manage Other Information

Click to Navigate to Work Instructions

Distributor Partner View Management | View and Download Reports | Manage My Reward Programs | Cisco Sales Contacts

Disti Partner View Management

Where You Can Find Resources

For complete details on access and managing Disti Partner View (DPV) relationships refer to the DPV site for resources, guides, FAQs, training, etc.

Click to navigate to:

Work Instructions

Only Partner User and the PSS Administrator can complete this task:

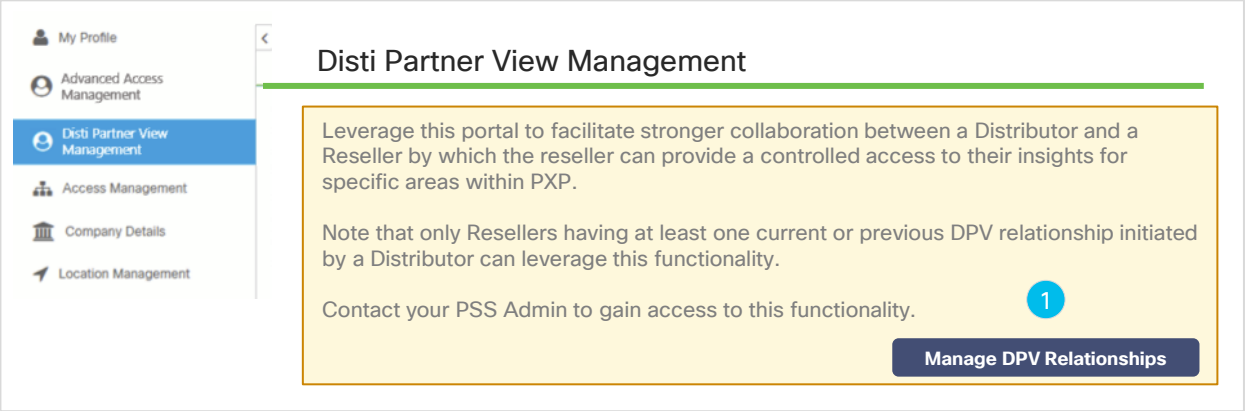
Click on task: Disti Partner View Management

1. Click on "Manage DPV Relationships" button to manage DPV Relationships

Note: The Manage DPV Relationships button will only be enabled (in dark blue) when your PSS Admin has assigned "Disti Partner View Relationship Management" function/capability to you as part of your PXP access.

For More Information: For complete details on access and managing Disti Partner View (DPV) relationships refer to the DPV site for resources, guides, FAQs, training, etc.

Disti Partner View Management



View and Download Reports

Why this is Important:

Here you can view how to generate reports that capture information for individuals at your company such as: Cisco Career Certified, Cisco Certified Sales Experts, Cisco Certified Network Associates, Cisco Network Professionals, Cisco Internet Experts, individuals with Cisco.com User IDs, individuals without Cisco.com User IDs, and all individuals

Click to navigate to:

Work Instructions

Only PSS Administrator can complete this task:

Click on task: Reports

1. Here you can view a list of all the available reports. Click (only one) report from the displayed list, once you click on your preferred link, the Excel report will begin to download

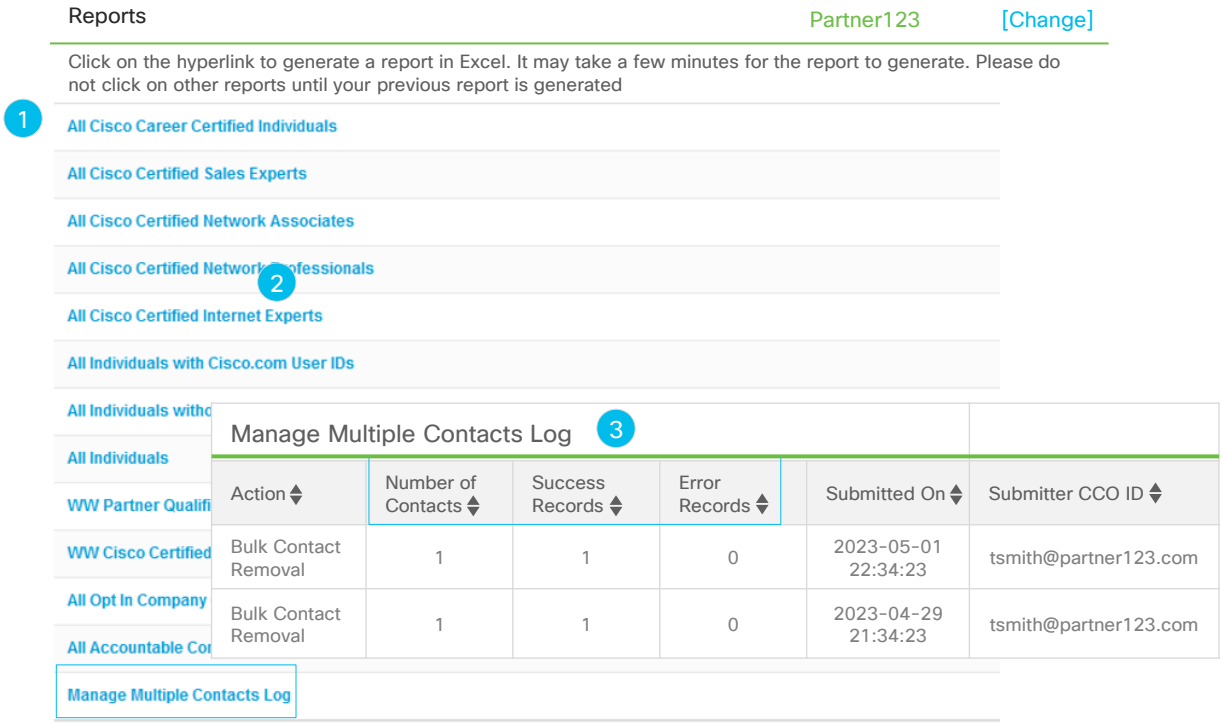
2. To view the report generated during "Bulk Contact Removal" click the "Manage Multiple Contacts Log" link

3. A pop-up screen will appear where you can choose a variety of downloadable reports as follows:

   - Number of Contacts: How many contacts have been removed
   - Success Records: How many contacts have been successfully removed
   - Error Records: How many contacts have not been removed due to an error

Proceed to step 4

View and Download Reports

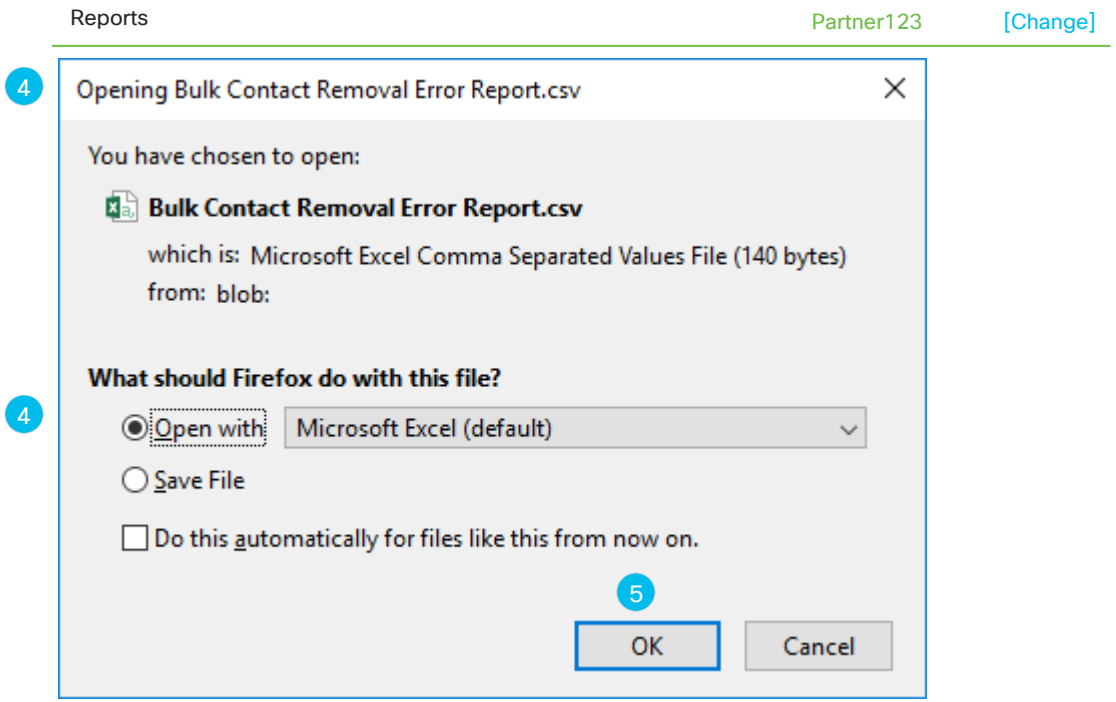


Only PSS Administrator can complete this task:

4. Upon selection of the report you wish to view, a pop-up menu will appear prompting you to choose the application to open with. Click "Open With" radio button, then "Microsoft Excel" from the drop-down men

5. Click "Ok" to open the file

View and Download Reports - Continued



Cisco Sales Contacts

Why this is Important:

In this section, you can identify your Cisco contacts. You will be able to filter by Channel Account Manager and Cisco Representative roles. Once you submit, you will be able to see the contact information and customer information.

.

Click to navigate to:

Work Instructions

Only PSS Administrator can complete this task:

Click on task: Cisco Sales Contacts

1. Enter the name of your company in the "Customer / Partner Name" and the Country of location in the "Country" field (red *asterisk fields are mandatory)
2. Click the "Submit" button
3. The Cisco Channel Account Managers associated with your company will be displayed

Important

If there are no Partner Account Managers or Cisco Representatives associated with your company, a message will appear on your screen stating so.

If you need channel support and do not have a Partner Account Manager associated to your company, please work with your local Distributor.

Cisco Sales Contacts – Channel Account Team

Cisco Sales Contacts

1 * Customer / Partner Name Partner123	1 * Country United States
State / Province Select One	City City
Postal Code Postal Code	Roles PSSM, PAM, PBM,...(45)

2 Submit Clear

3 Channel Account Team | Who is My Cisco Rep?

Name	Role	Email	Partner Name	Country	State	City	Postal Code
Mary Adam	PSDM	madam@cisco.com	Partner123	United States	CA	San Jose	95131
Mary Adam	PSDM	madam@cisco.com	Reseller85	United States	AZ	Phoenix	85001

Only PSS Administrator can complete this task:

Click on task: Cisco Sales Contacts

1. Click on "Who is My Cisco Rep?" tab
2. The Cisco Representatives associated with your company will be displayed

Cisco Sales Contacts – Cisco Representative

1

Channel Account Team | Who is My Cisco Rep?

2

Name	Role	Email	Company	Region	Customer Name
Hugo Bishop	Account Manager Security Sales	hbisho@cisco.com	Partner123	Pky_eaw_educ_academy(team)	Customer 87
Peter Jones	Account Manager Security Sales	pjones@cisco.com	Reseller85	Pky_eaw_educ_academy(team)	Customer 25

Support & Resources

Why this is Important:

Where to go for help and additional resources that can help you with your Cisco experience

Click to navigate to:

Useful Links

Support & Resources

To submit and check the status of your case, refer to the Customer Service Hub. Upon submission of your case, you will receive a response from Cisco within 2 business days with a status.

Issues	How to resolve
Access Management	
• Access to tools (assign partner admin role) • Tool support (partner reg., associate contacts, assign rebate coordinator, etc.)	Open a Partner Tools support case if a review of this guide does not answer your question.
• Service Access Management Tool (SAMT)	For more information, refer to the following SAMT resources: Website, Training, and SAMT Support.
Program Set-Up	
• **Enrollment:** Not able to complete Channel Program Incentive Agreement (CPIA) enrollment. • **Login** issues • **Associating** your Cisco.com ID with your company	For more information, refer to the following: • CPIA User Guide • Partner Self Service tool Contact one of the PSS Administrators for your company.
Compensation	
• Rebate claim notification not received due to incorrect or missing contact information • Rebate coordinator not assigned	Contact one of the PSS Administrators for your company to ensure that a Rebate Coordinator has been assigned for the programs of your choice
• Incorrect beneficiary name or country on claim notification • Questions regarding payment amounts	Open an Incentives and Funds Program Support case

CISCO

Manage My Reward Programs

Why this is Important:

There are currently no programs using this feature within the Partner Self Service application.

Click to navigate to:

N/A