Partner Self Service

User Guide

February 26, 2026

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Click to View Information and to Manage Tasks:

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 information.

To access the PSS application, complete these steps:

1. Create Cisco.com User Profile Account

- Create your profile: https://id.cisco.com/signin/register.
- Once completed, you will receive an email confirming your Cisco.com User Profile creation.

2. Gain Partner-level Access

- Associate yourself with your company using the Partner Self Service (PSS) application.
- Refer to the Associate Myself with a Company section for the steps to complete this task.

www.cisco.com/go/PSS

User Definitions + Tasks

Below are the user profiles and capabilities within PSS that you will see referenced throughout this guide.

Guest User: Not associated to partner company.

- This role cannot grant access to others *and cannot access PPE tool.*
- User only has access to Associate Myself with a Company task within PSS Application

Partner User: Is associated to partner company.

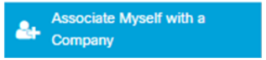
- This role cannot grant access to others.
- Manage My Profile
- Access Management (i.e. For viewing and requesting access to partner applications, and roles (PSS admin access, PM&A + PPE, etc.)
- Manage My Reward Programs
- View Cisco Sales Contacts
- Disti Partner View Management
- Find My PSS Admin

PSS Administrator*: The first person to register partner 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 associated employees.

Task management includes:

- 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 access to applications PXP, EAMP, Adoption Accountability Planning (formerly named DLSE), etc.)
- View Cisco Sales Contacts
- Company Details
- Location + 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)
- Disti Partner View Management
- Find My PSS Admin

***Important:** All active Cisco-registered partner companies (at the BE_GEO_ID level) are recommended to have a minimum of two named "PSS Administrators" (PSS Admins), who should be different individuals, and are the designated controllers of their own company's user accounts, entitlements and permissions within and across Cisco's tools. A PSS Admin cannot assign access to themselves; this must be done by another PSS Admin. PSS Admins have the highest level of access to their company's Cisco data and are accountable for on-boarding and off-boarding their company's Cisco users.



Only **Guest User** can complete this task.
Click on task: Associate Myself with a Company

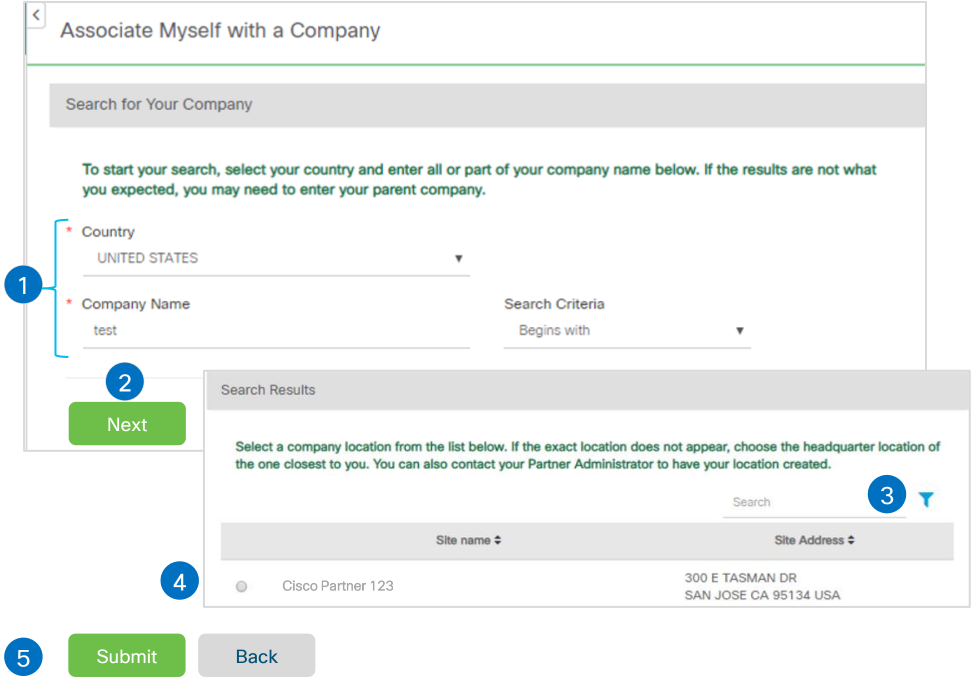
1. Fill in Company Details
2. Click Next
3. Click Search icon to display list of addresses
4. Click on radio button for company selection
5. Click Submit button to proceed to next page to review your profile information and make any necessary updates, then click Submit button.

   Note: If you moved to a new partner company which you are submitting association to, you can update your email address during this step.

Why do I need to do this?

To be granted access to specific tools and/or assigned to roles (rebate coordinator) you must first be associated with your company.

Associate Myself with a Company



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

Your request is still being processed.

Once your association is approved by your companys Cisco Partner Administrator, you will be notified by email and upgraded to partner level access.

7

Name	Email
Alan Jones	Alan_Jones@partner123.com
Tom Smith	Tom_Smith@partner123.com
Elizabeth_Je	Elizabeth_Je@partner123.com

Send Reminder Email to Admin | Cancel Request

Manage My Profile

Click to Manage Tasks:

Basic Information

- Edit Basic Profile Information
- Update Email

Location Management

- Change Associated Location
- Change / Remove Company Association
- Delete Additional Cisco.com User IDs

Other

- Add Cisco Testing to Your Profile
- Receive Cisco Communications
- Find My PSS Admin

My Profile

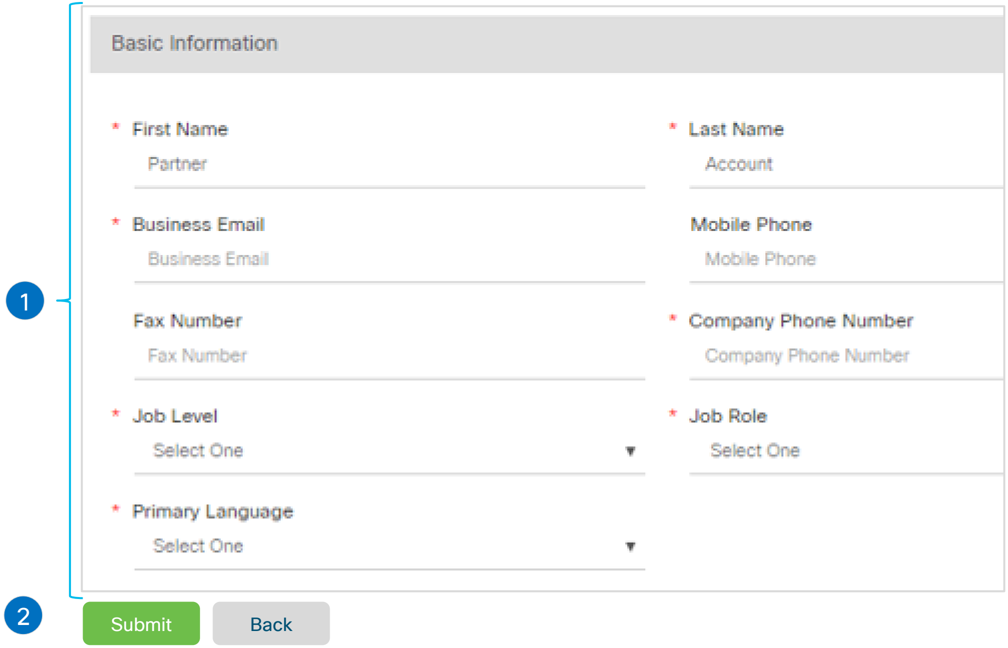
Only Partner User and PSS Administrator can complete this task. Click on My Profile task to manage:

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



My Profile

Only **Partner User** and **PSS Administrator** can complete this task. Click on My Profile to manage:

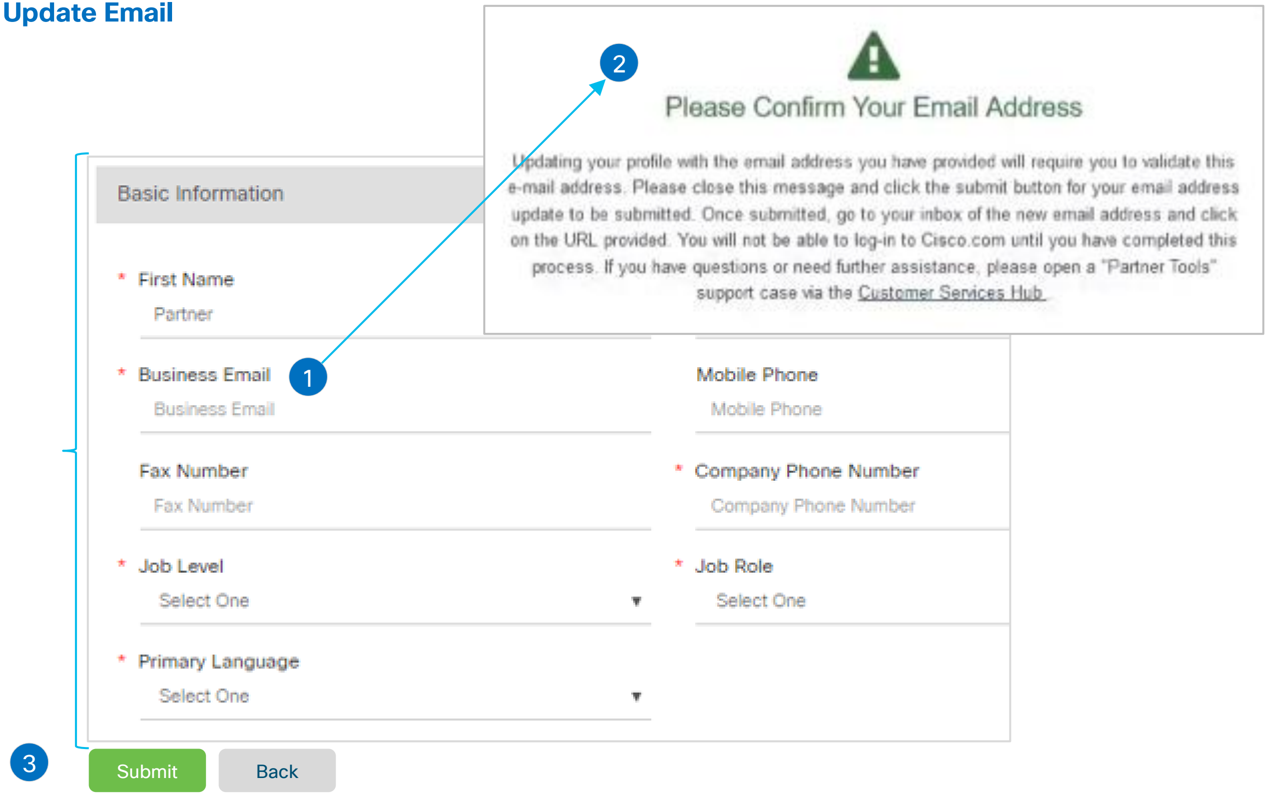
1. Edit Business Email field

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



My Profile

Only Partner User and PSS Administrator can complete this task. Click on My Profile task to manage:

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 next steps.

Why do I need to do this?

By ensuring your associated location is accurate, we can contact you when necessary.

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.

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

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

My Profile

Only **Partner User** and **PSS Administrator** can complete this task. Click on My Profile task to manage:

1. Scroll to Business Address.

2. Under Business Address, click on Change or Remove my Company Association link

Proceed to next step.

Why do I need to do this?

- If you have moved to a new partner company, complete steps 1-5 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.
- You will be able to update your email address when completing steps to associate to your new partner company.

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

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.

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.

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.

Change/Remove Association

Are you sure you want to proceed?

4

Yes, Remove my Association | No

My Profile

Only **Partner User** and **PSS Administrator** can complete this task. Click on My Profile task to manage:

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 next step.

Why do I need to do this?

It is important to have a single Cisco.com User ID to ensure that all future communications, system prompts, and interactions with Cisco systems are streamlined. Please use this section to confirm that you have completed this step.

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

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.

Open a “Partner Tools” support case via the Customer Service Hub if you have questions and concerns.

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 Service Hub before taking action.

My Profile

Only **Partner User** and **PSS Administrator** can complete this task. Click on My Profile task to manage:

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.

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.

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

My Profile

Partner Users must complete this task.
Click on My Profile task to manage:

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

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.

2

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 Manage Tasks:

Company Details

- View Company Details

Location Management

- Search Locations
- Add Location
- Edit Location
- Delete Location
- Display Your Company in the Partner Locator Application
- Designate HQ Location
- Display Channel Account Team

Contact Management

- Search Contacts
- Add Contacts
- Edit Contacts
- Delete Contacts
- View Career Certifications
- Add Contact Type
- Move Contacts to Another Location
- Remove and Move Contacts to Another Location for Multiple Contacts
- Bulk Contact Removal

Company Details

Only **PSS Administrator** can complete this task.
Click on Company Details task to manage:

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 next step.

Why do I need to do this?
When you need to modify your company information and view your company's Cisco Certifications, Specializations, and Authorizations.

Note: 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

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 next step.

Company Details – Continued

5

Registration Status

Application ID: 123456

Application Status: Approved

Application Type: Partner Registration

Applicant Cisco.com User ID: pam@partner123.com

Applicant Details

Name: New Name, New Surname

Phone: 408-555-1212

Email: email@domain.com

Full Name on Agreement: partner123

Agreement Dates Timeline

Agreement Expiration Date
14-May-2023

Agreement Effective Date
15-May-2021

Agreement Approved Date
15-May-2021

Agreement Signed Date
15-May-2021

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 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

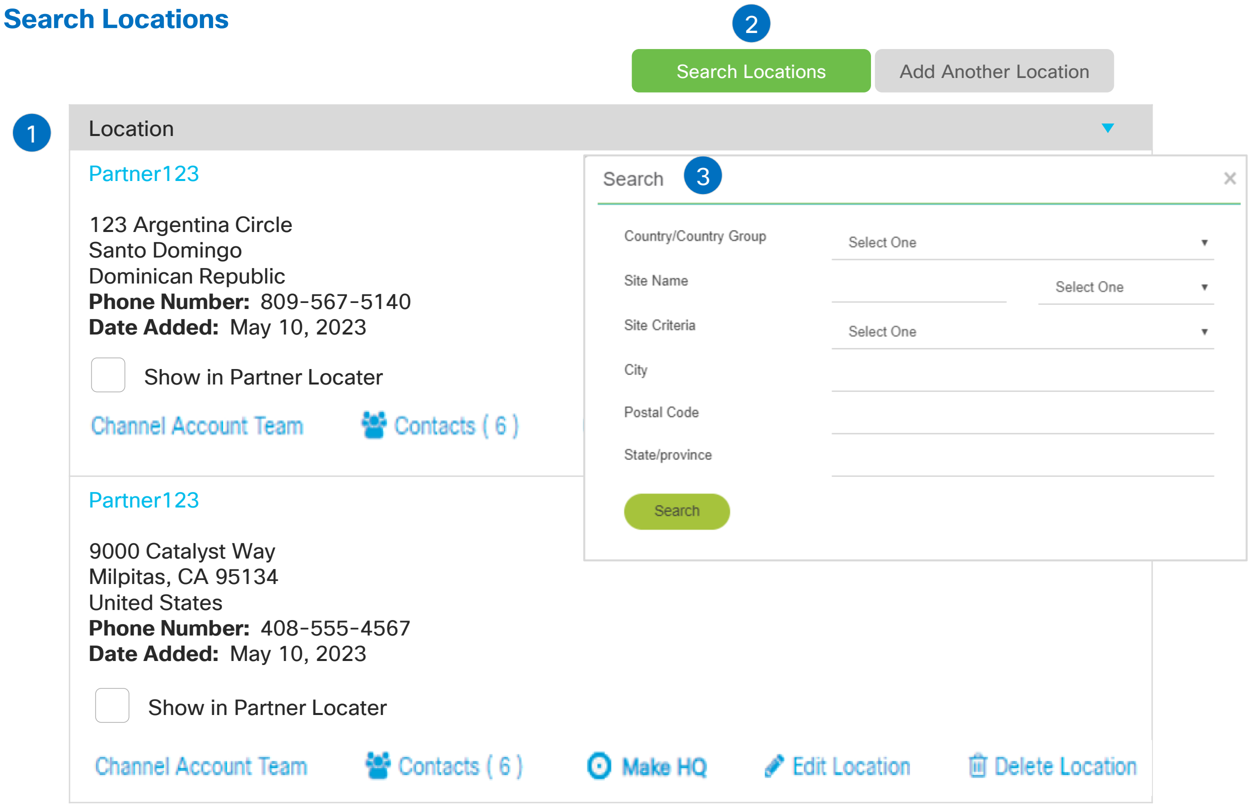
Search

Qualification Type	Certification/Specialization(s)/Authorization(s)	Last Approved Date	Renewal Date
Auth	CSPP Identifier	05-May-20	01-Jan-25
Auth	Cisco Open Stack Private Cloud	05-May-20	01-Jan-26
Auth	Disabled Veteran Business Enterprise	05-May-20	01-Jan-26
Auth	HubZone Small Business	05-May-20	01-Jan-27

Location Management

Only **PSS Administrator** can complete this task. Click on Location Management to manage:

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.



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.

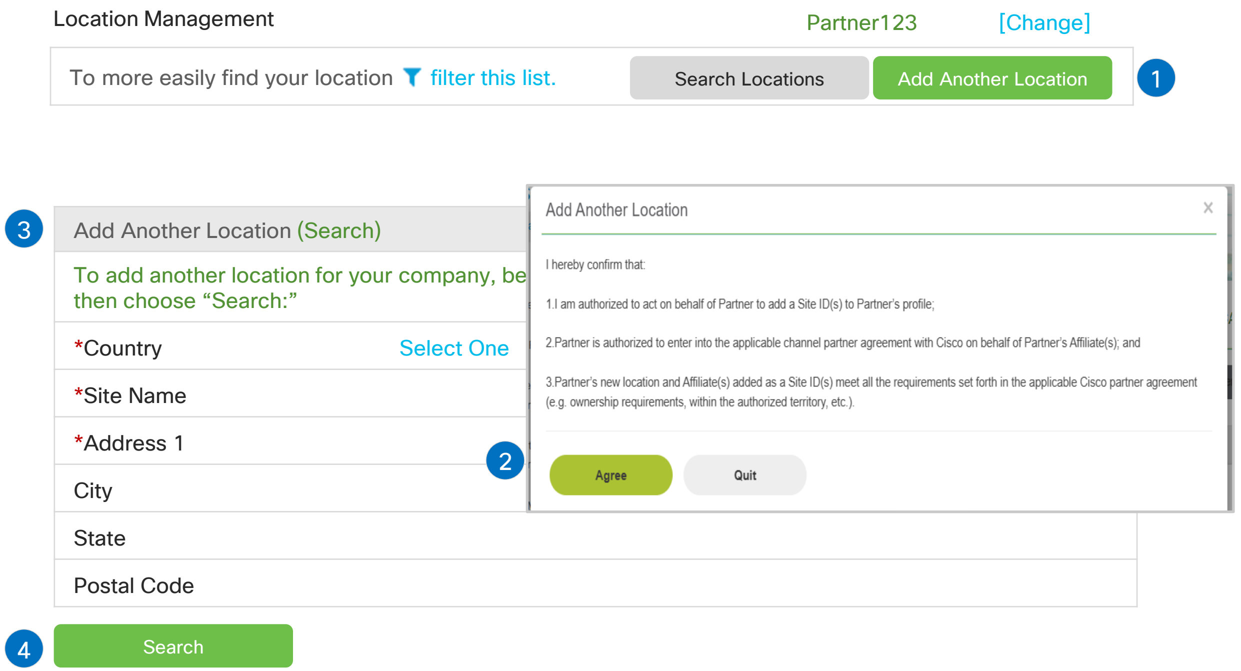
Location Management

Only **PSS Administrator** can complete this task. Click on Location Management task to manage.

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 next step.

Add Location



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 ×

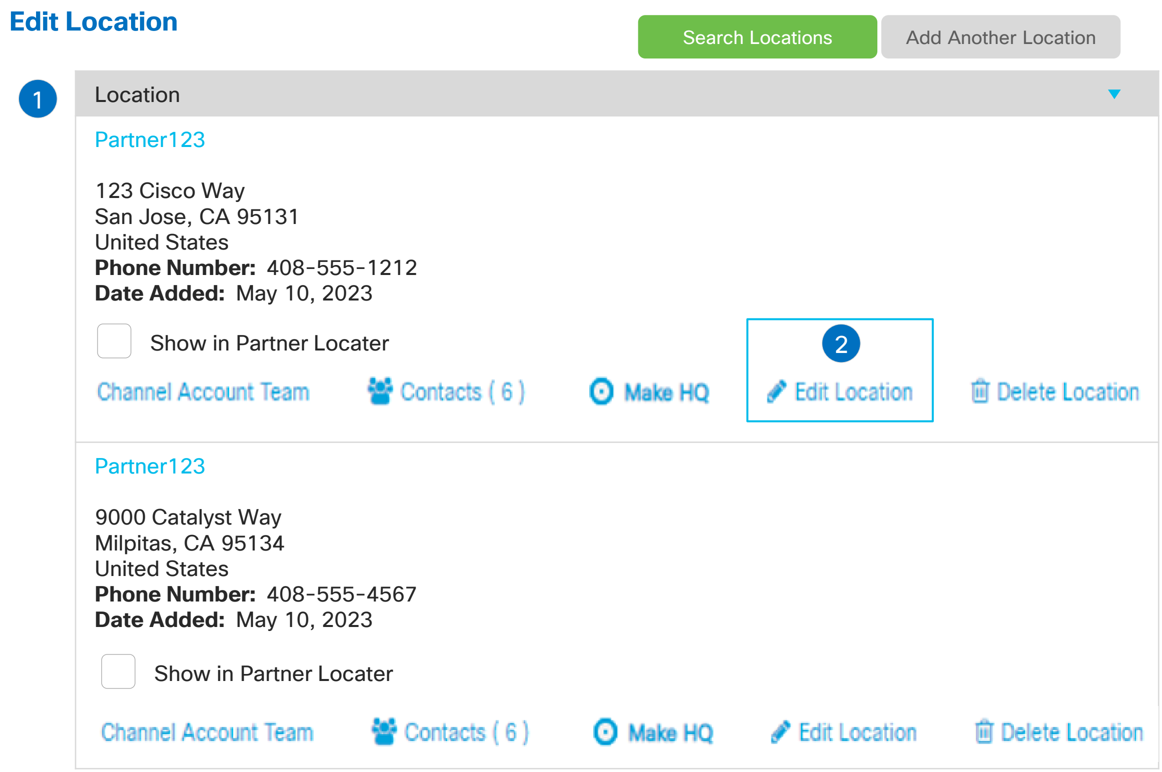
Please allow 24 hours to reflect in Partner Locator.

Location Management

Only **PSS Administrator** can complete this task. Click on Location Management task to manage.

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

Proceed to next step.



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

Location Management

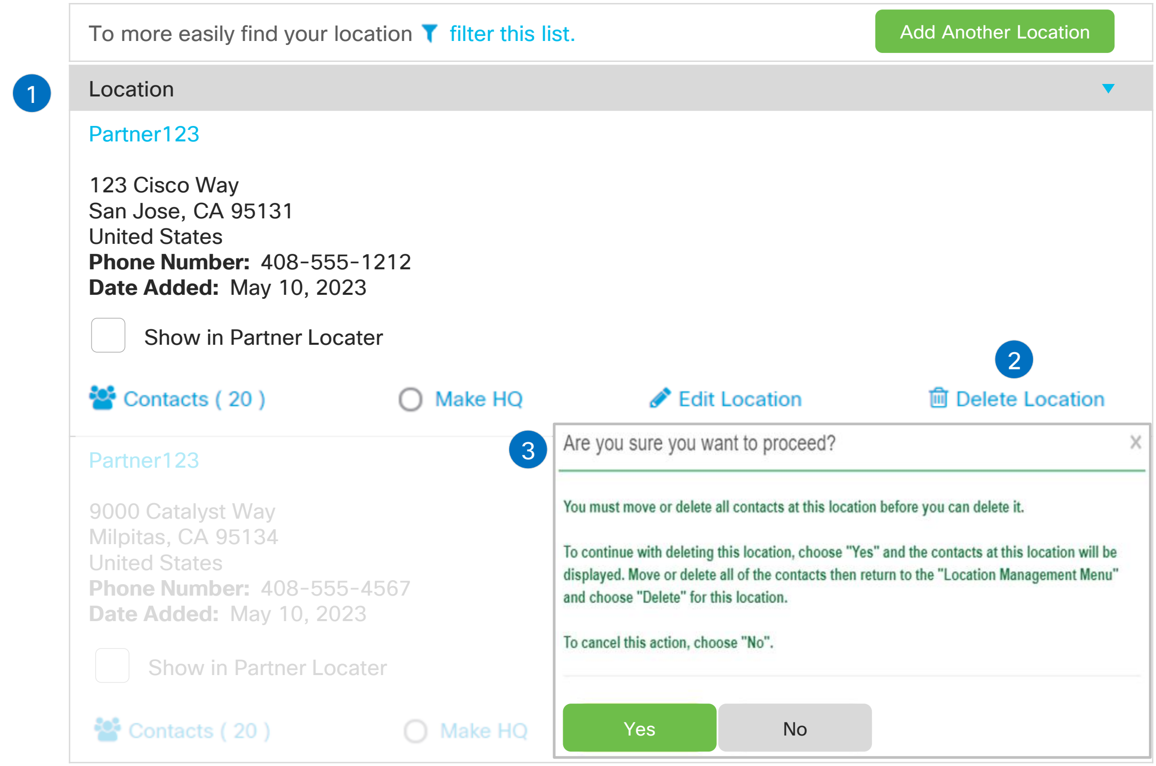
Only **PSS Administrator** can complete this task. Click on Location Management task to manage.

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



Location Management

Only **PSS Administrator** can complete this task. Click on Location Management task to manage.

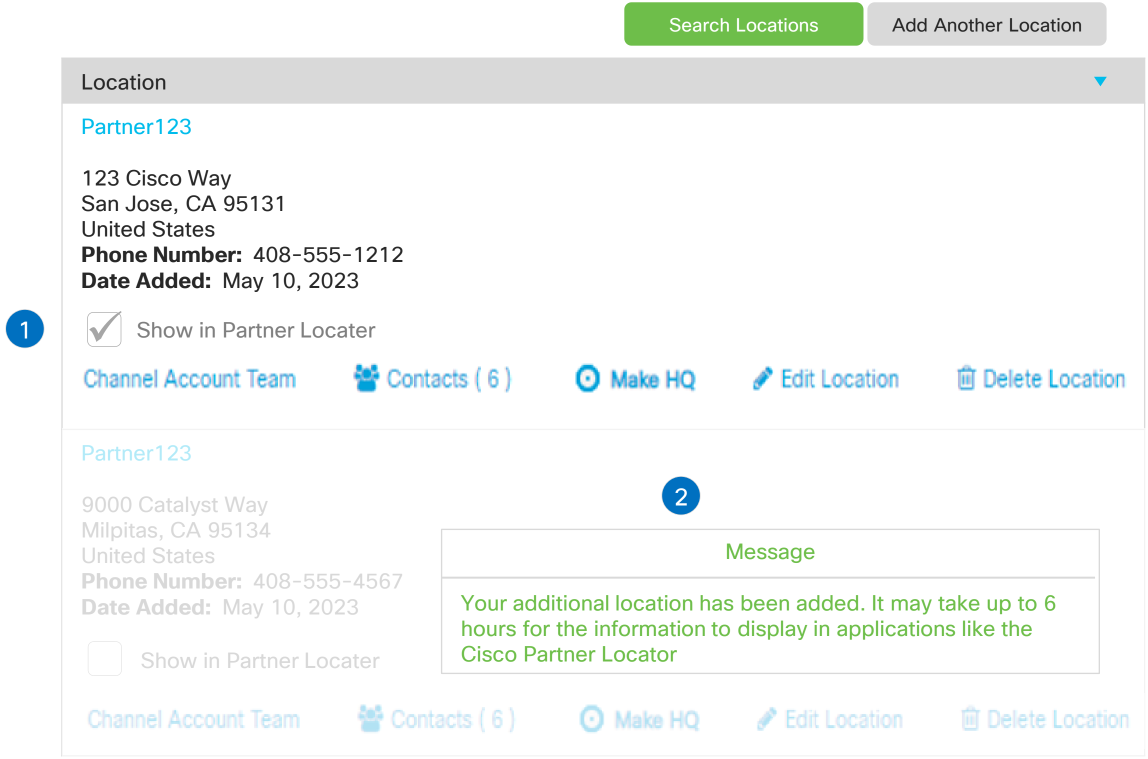
1. Click the Show in Partner Locator box to have your company displayed in this application. If you do not check this box, your company will not be displayed in Cisco Partner Locator.

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



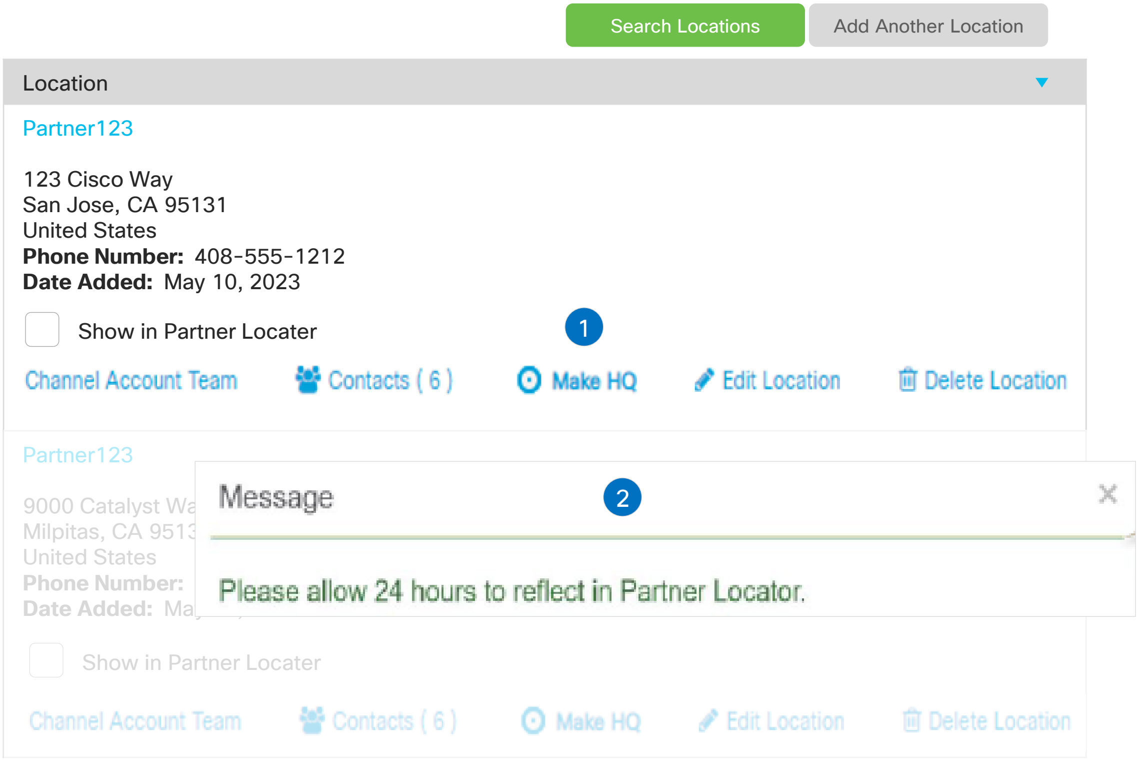
Location Management

<u>Only</u> **PSS Administrator** can complete this task. Click on Location Management task to manage.

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



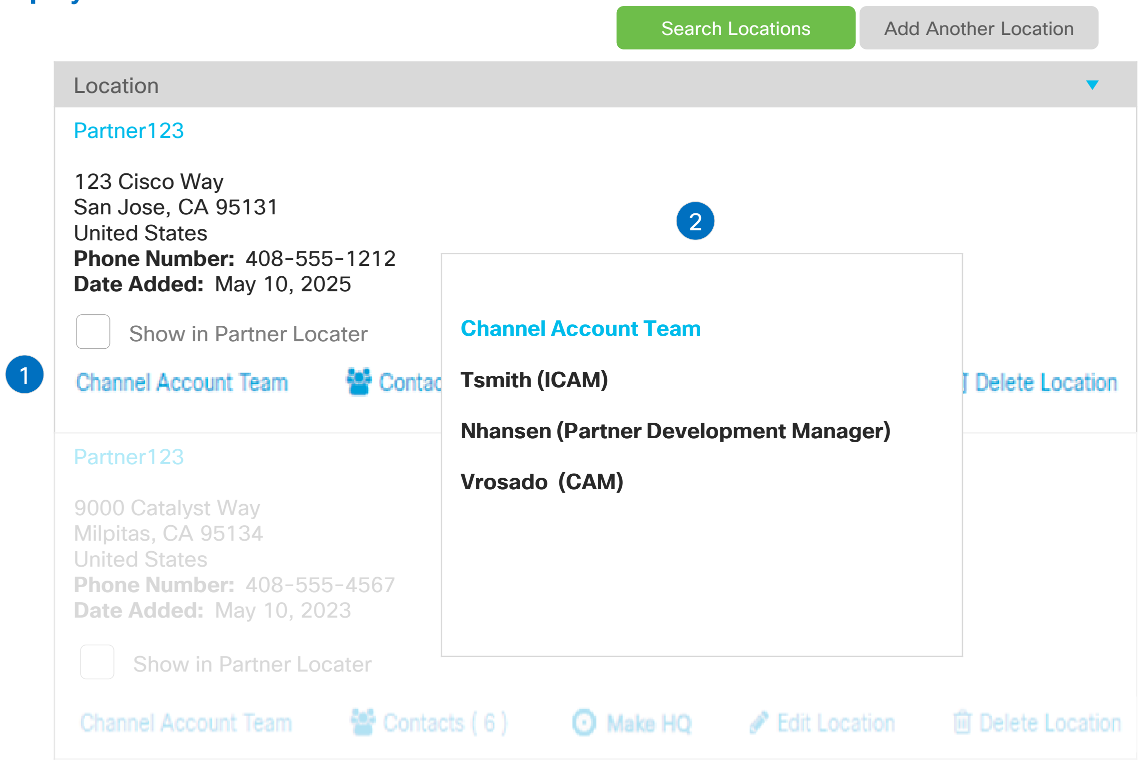
Location Management

Only **PSS Administrator** can complete this task. Click on Location Management task to manage.

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



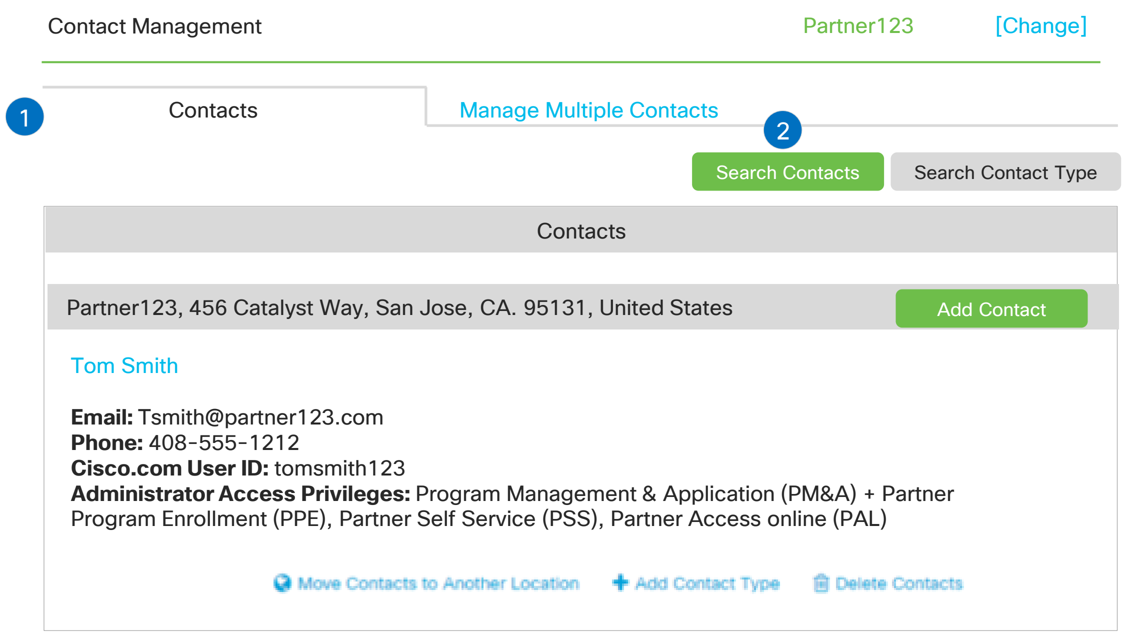
Only **PSS Administrator** can complete this task. Click on Contact Management task to manage.

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 next step.

Important

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.

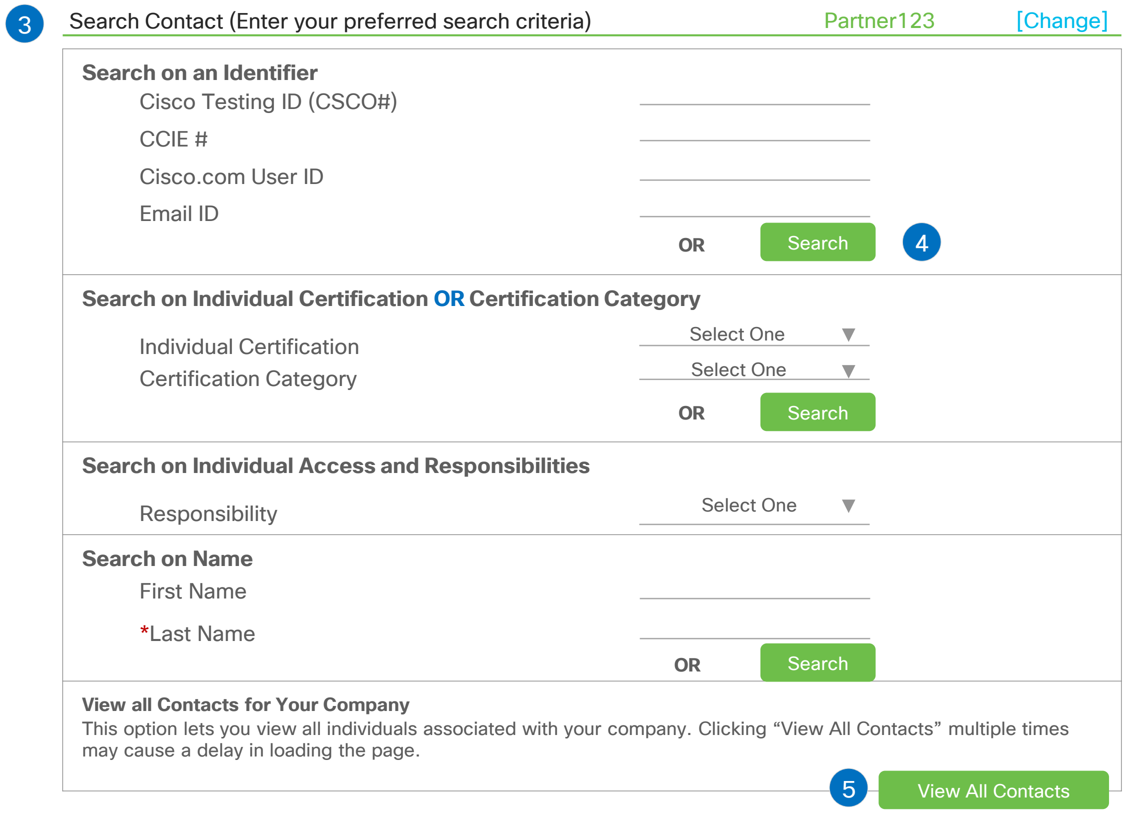
Search Contacts



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.

Proceed to next step.

Search Contacts – Continued



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

Search Contacts – Continued

Contact Management Partner123 [Change]

Contacts | Manage Multiple Contacts

Search Contacts | Search Contact Type

X Clear / View All Contacts

Contacts

Partner123, 456 Catalyst Way, San Jose, CA. 95131, United States | Add Contact

6

Tom Smith

Email: Tsmith@partner123.com
Phone: 408-555-1212
Cisco.com User ID: tomsmith123

Move Contacts to Another Location | Add Contact Type | Delete Contacts

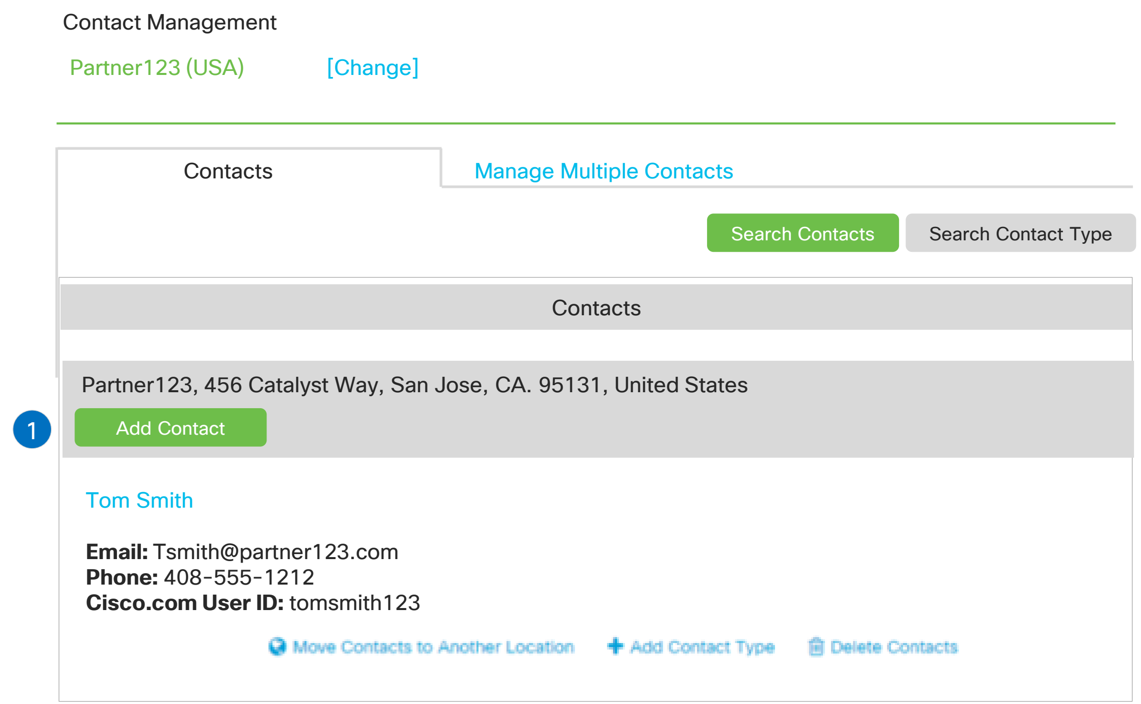
Contact Management

Only **PSS Administrator** can complete this task. Click on Contact Management task to manage.

1. A list of associated contacts and location they are associated to for your company will display. Click Add Contact button next to the location that you would like to add a contact to.

Proceed to next step.

Add Contacts



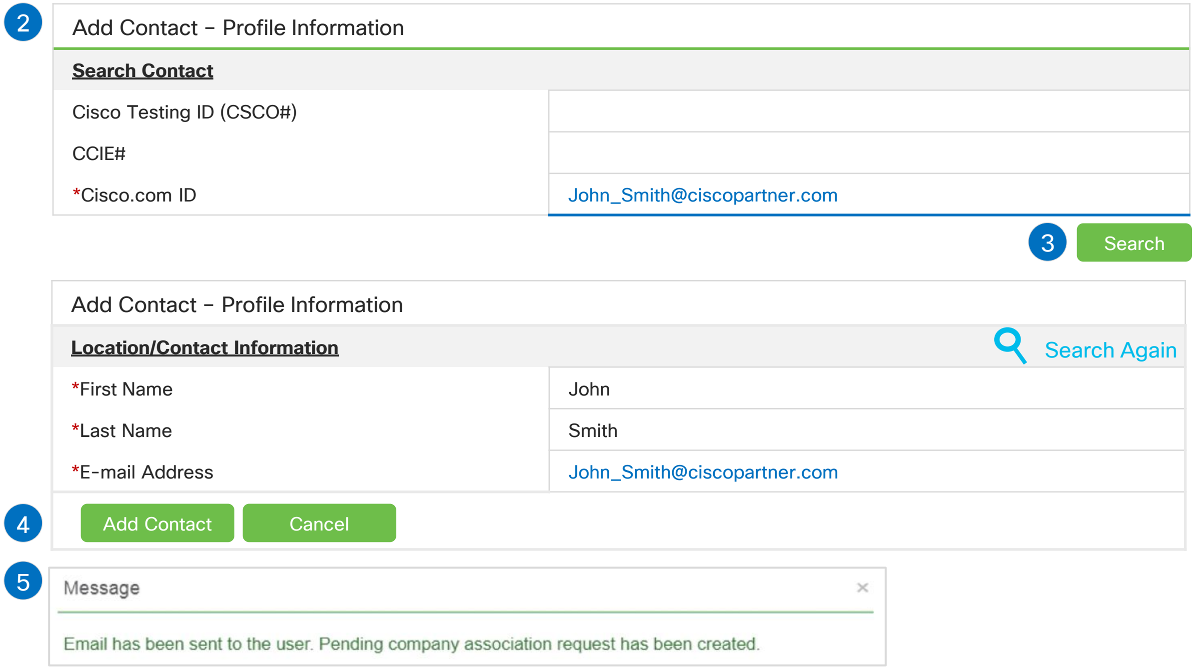
2. A pop-up where you can either search for the contact by Cisco.com ID or email (red *asterisk fields are mandatory) or the Cisco Testing ID (CSCO#) or the CCIE #.

3. Click Search button.

4. If the content information is found, it will be displayed. Click Add Contact button. **Note:** Click Search Again if you would like to initiate a different search.

5. A confirmation message will be displayed indicating that the contact has been notified about their company association.

Add Contacts – Continued



6. User will click on link in email which will direct user to Partner Self Service (www.cisco.com/go/pss) to accept/decline association.

7. After user clicks Accept, a pop-up message will display informing user about required action needed to proceed. User clicks OK button.

Add Contacts – Continued

6

Partner Self Service

Change Language | Resources

Company Association Request

The Partner Administrator for your company has requested your association with this company. By accepting this association, you can take advantage of many Cisco Partner services.

Yes, I belong to this company and accept this association: ACCEPT

Yes, I belong to this company, but choose to decline this association: DECLINE

No, I do not belong to this company, I choose to decline this association: DECLINE

7

Action Required – Complete Your Profile

To proceed, please review and complete the following information:

*Company Phone Number

*Job Role

*Job Level

*Primary Language

OK

8. User will need to review and complete mandatory profile information and click Submit button. User will now be assigned a Partner User access level and will be able to perform the tasks outlined on the User Definitions page.

Add Contacts – Continued

My Profile

8

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	

Submit

Contact Management

Only **PSS Administrator** can complete this task. Click on “Contact Management” task to manage.

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	

Business Address 2	
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#)	Cisco Testing ID (CSCO#)
If you have more than one CSCO#, click **here.**	(For example: CSCO12345678)

4 Submit

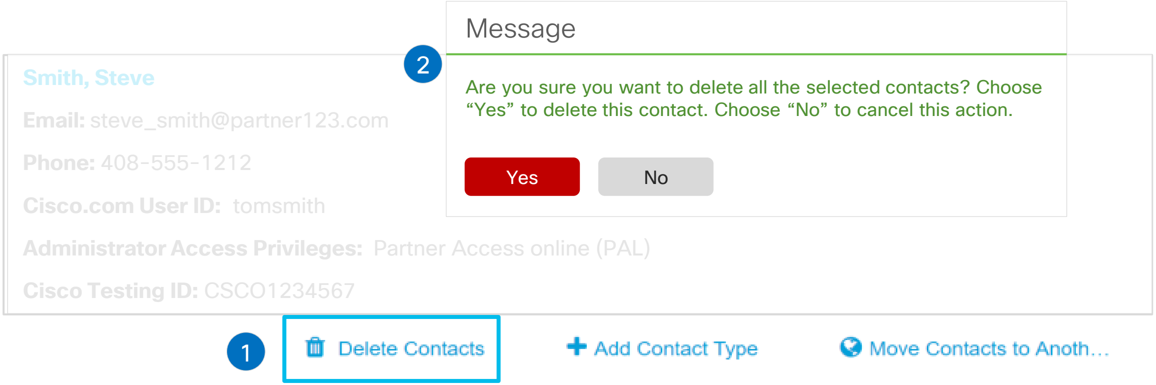
Only **PSS Administrator** can complete this task. Click on Contact Management task to manage.

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.

Delete Contacts



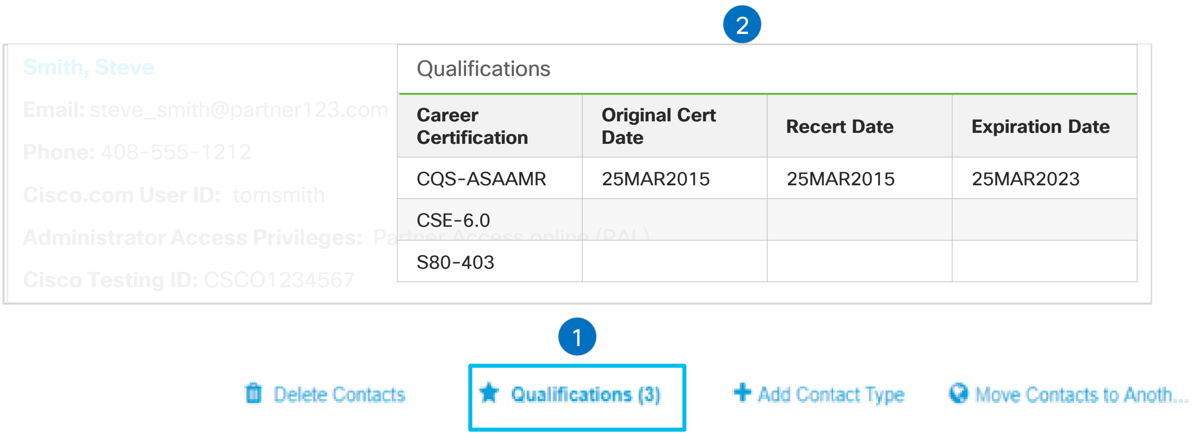
Contact Management

Only **PSS Administrator** can complete this task. Click on Contact Management task to manage.

1. Click the Qualifications icon. This icon will appear if a Cisco Testing ID has already been added to the contact's 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



Career Certification	Original Cert Date	Recert Date	Expiration Date
CQS-ASAAMR	25MAR2015	25MAR2015	25MAR2023
CSE-6.0			
S80-403			

Additional Information

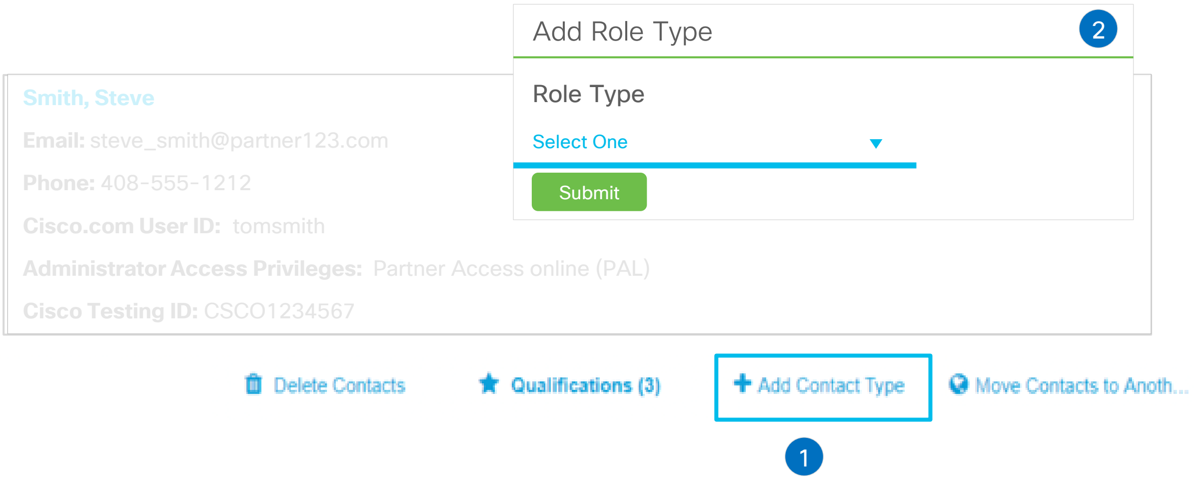
Exam expiration dates may not be applicable for specific Partner Specializations and Authorizations. Some old exams may still qualify a candidate for a role even if the exam has been refreshed with a new number or replaced outright by another exam. Please refer to the applicable requirements documentation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

Contact Management

Only **PSS Administrator** can complete this task. Click on Contact Management task to manage.

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



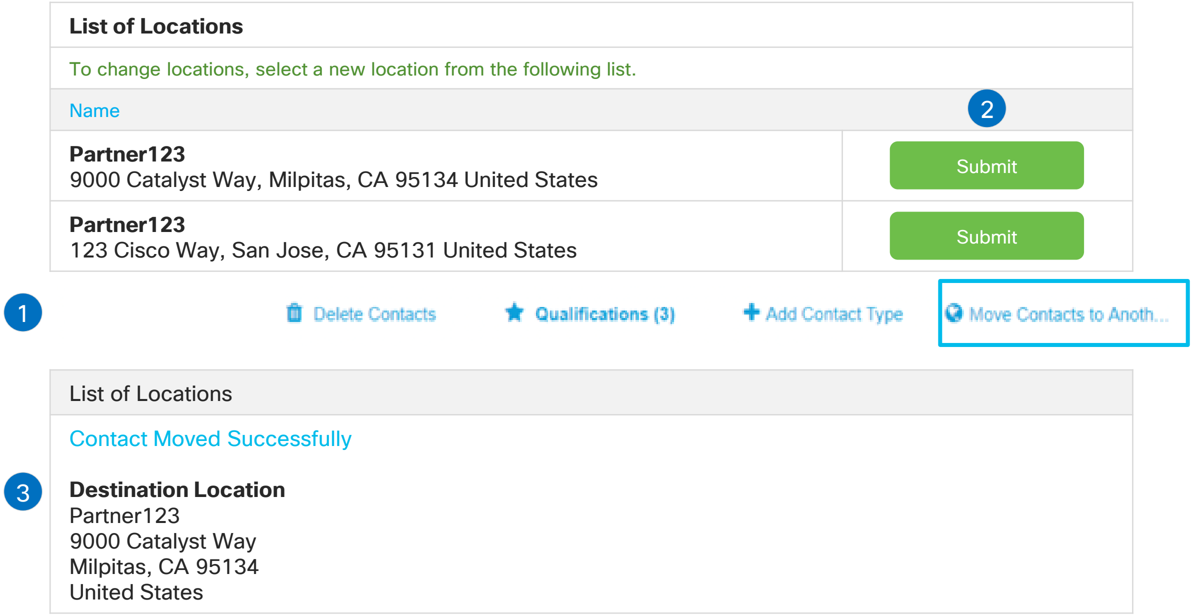
Only **PSS Administrator** can complete this task. Click on Contact Management task to manage.

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



Contact Management

Only **PSS Administrator** can complete this task. Click on Contact Management task to manage.

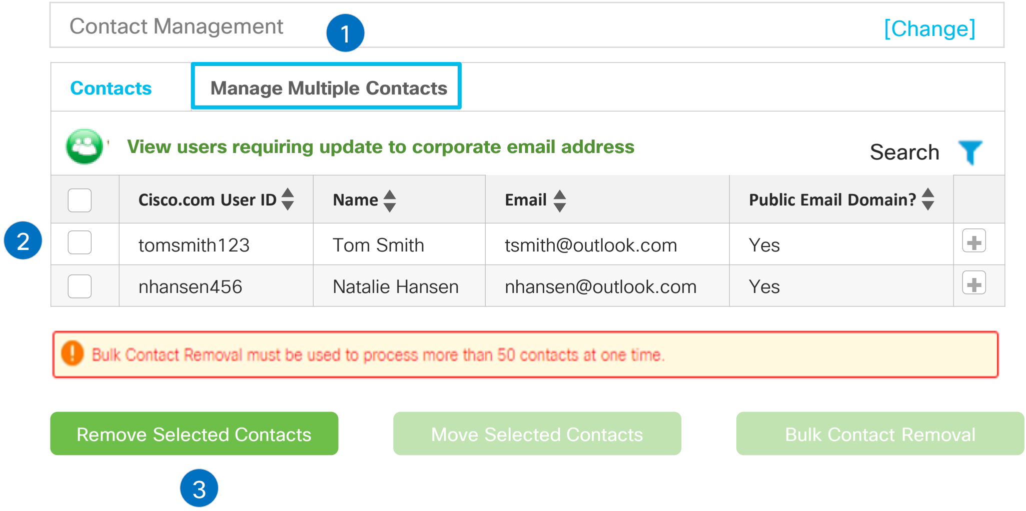
1. Click Manage Multiple Contacts tab. Here you can remove, move, or do bulk contact removals.

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 7 -11 for additional steps)
   - Bulk Contact Removal (Used only with 50+ contacts)

Remove and Move Contacts to Another Location for Multiple Contacts

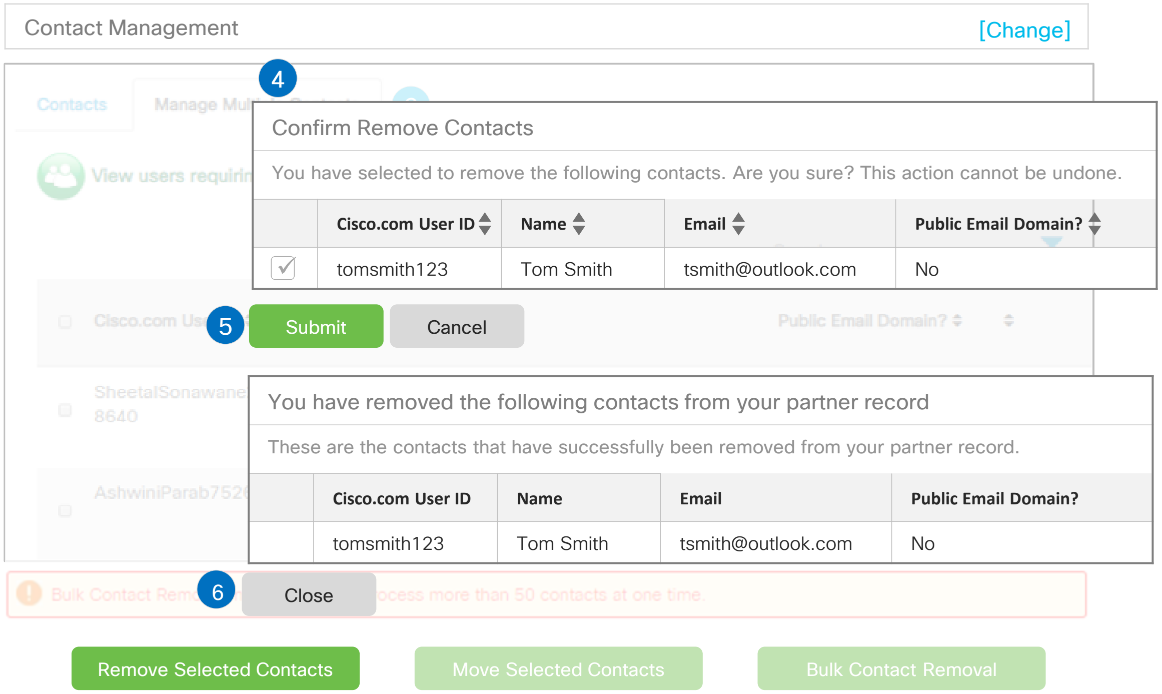


4. If you selected the option to Remove Selected Contacts, a pop menu will appear asking you to confirm the removal of the contacts.

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



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 next step.

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

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

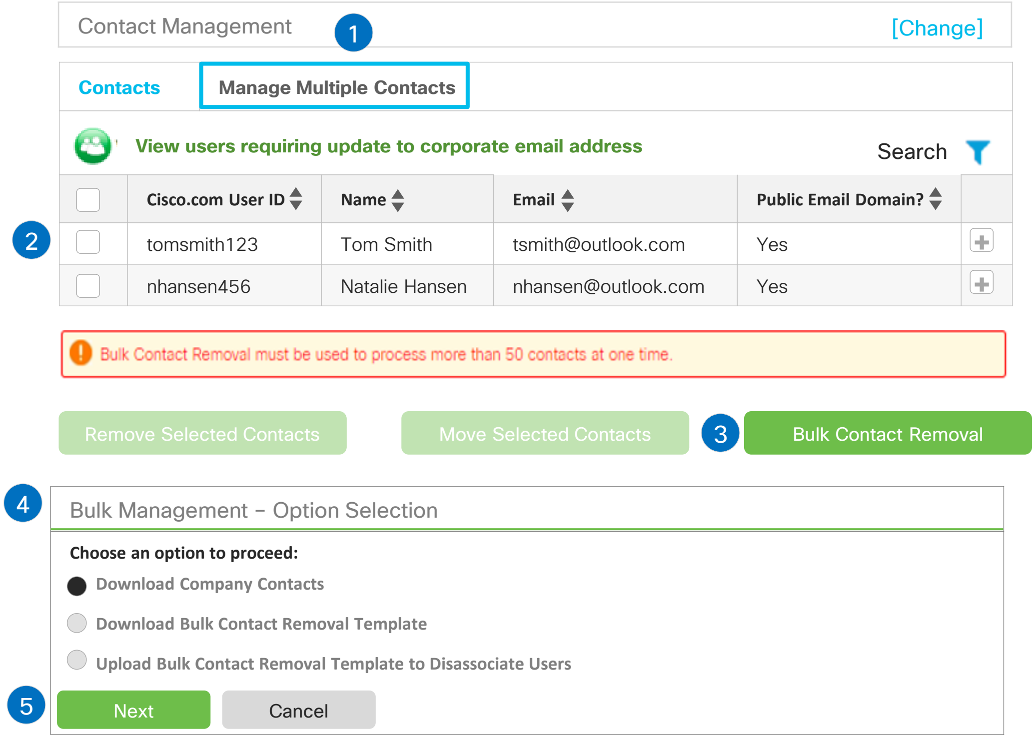
Close

Contact Management

Only **PSS Administrator** can complete this task. Click on Contact Management task to manage.

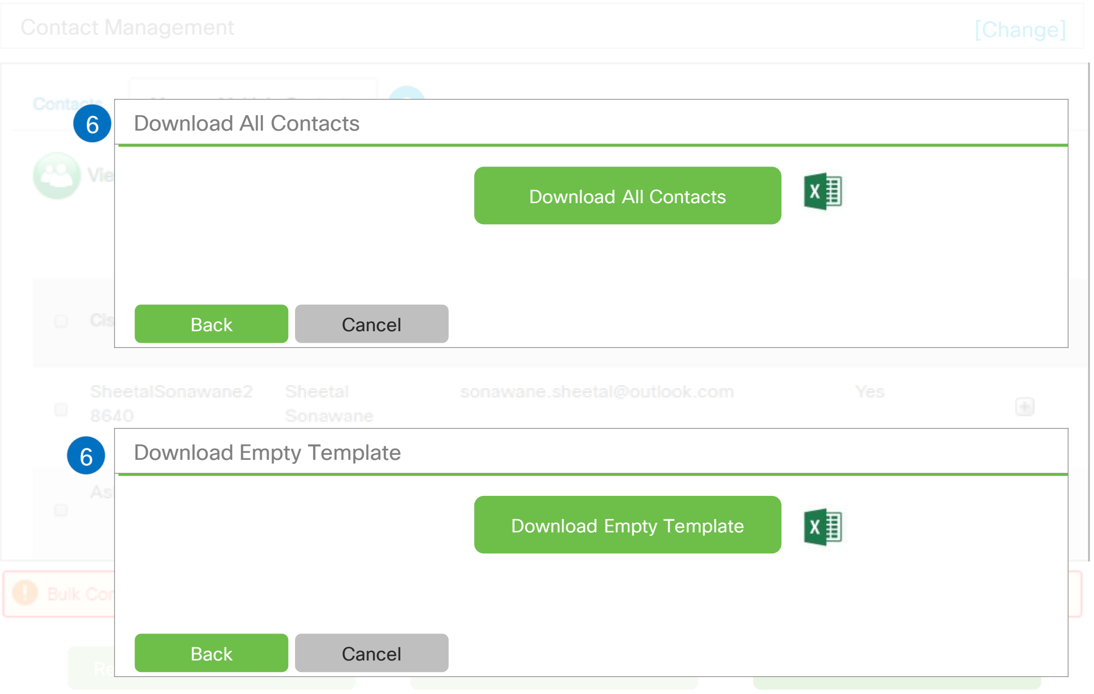
1. Click Manage Multiple Contacts tab. Here you can do bulk contact removals.
2. Select the Cisco.com User IDs you would like to manage.
3. Click the Bulk Contact Removal button
4. A pop-up menu will appear that provides you with three options:
   - Download company contacts. This will download an Excel (.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. Proceed to next step.

Bulk Contact Removal



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

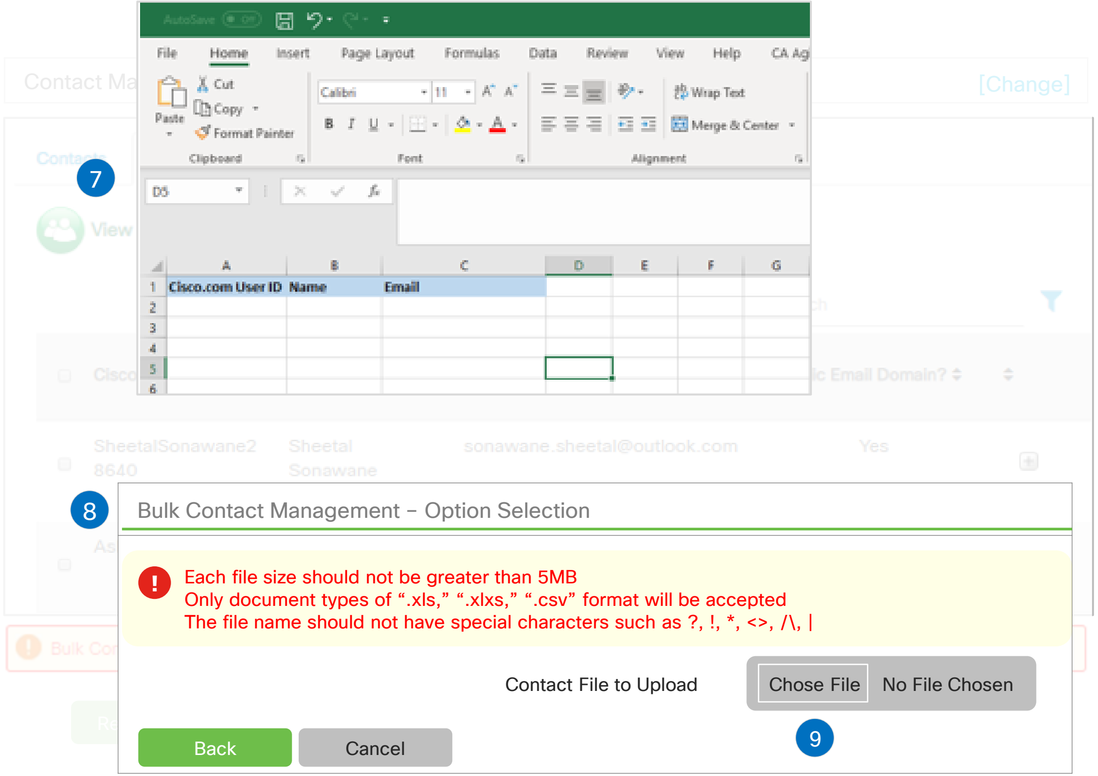


Bulk Contact Removal – Continued

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.

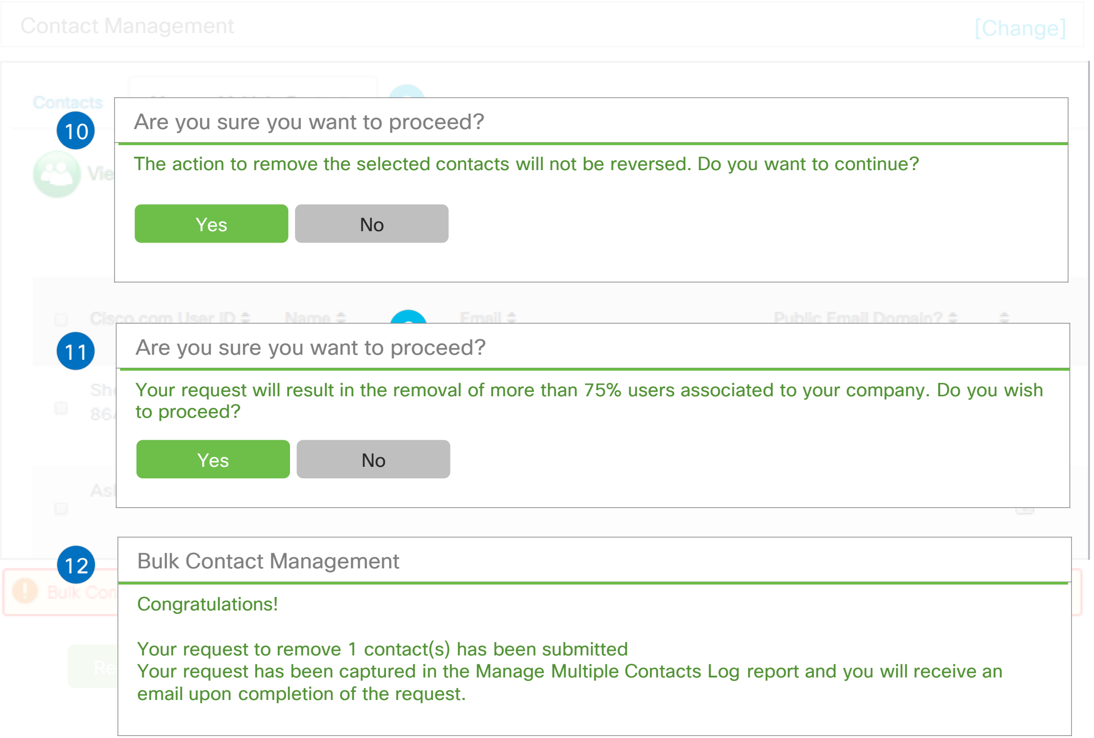
8. From the Bulk Contacts Management – Option Selection select the Upload Bulk Contact Removal template to disassociate users.

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

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.



Manage Access Requests

Click to Manage Tasks:

Association Requests

- Employee Initiated
- PSS Administrator Initiated

Access Management: For viewing and granting partner tools administrator access (i.e. PSS admin access, PM&A + PPE)

- View and Edit Company Access:
  - Search for Tool Users in Company
  - Search for an Individual
  - View All Contact Access
- Request Additional Access
- View/Remove My Access

Advanced Access Management: For viewing and granting access to applications such as PXP, EAMP, Adoption Accountability Planning, etc.

- Manage Cisco Tools Access

Other Access Management:

- Find My PSS Administrator
- Global Administrator Access

Accountable Program Contacts

- Overview
- View and Delete Contact
- Add a New Contact (Rebate Coordinator)

Association Requests

Only the **PSS Administrator** can complete this task. Click on Association Request task to begin management.

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 next step.

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

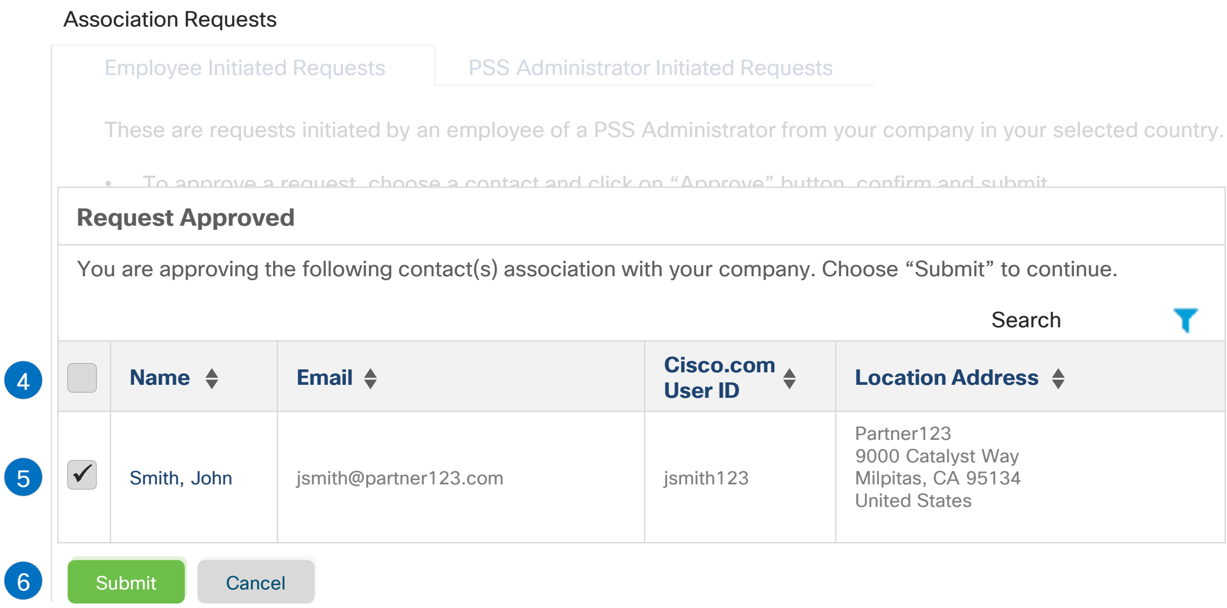
3 Approve | Deny

Employee Initiated (Approval)

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.



7. A pop-up screen will appear confirming the association requests that have been approved.

   Proceed to next 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...

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

Association Requests

Only the **PSS Administrator** can complete this task. Click on Association Request task to begin management.

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 next steps.

PSS Administrator Initiated Requests to Change Location or Cancel

Association Requests

1

Employee Initiated Requests | PSS Administrator Initiated Requests

Search

	Name	Registration Date	Country	Status
2 ✓	Smith, John	Sep-09-24	United States	Pending
☐	Ng, Charles	May-10-25	United States	Pending

3 Change Location | Cancel Request

4

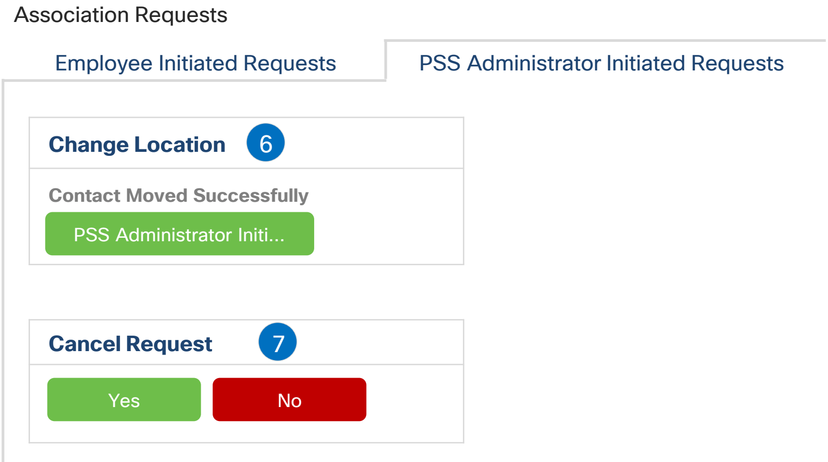
	Location Name
●	Partner123, 9000 Catalyst Way, Milpitas, CA 95134 United States
○	**Partner123,** 765 Cisco Way, San Jose, CA 95131 United States
○	Partner123, 999 Argentina Circle, Santo Domingo, 76091 Dominican Republic

5 Submit | Cancel

PSS Administrator Initiated Requests to Change Location or Cancel – Continued

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.

Only **PSS Administrator** can complete this task. Click on Access Management task to begin management.

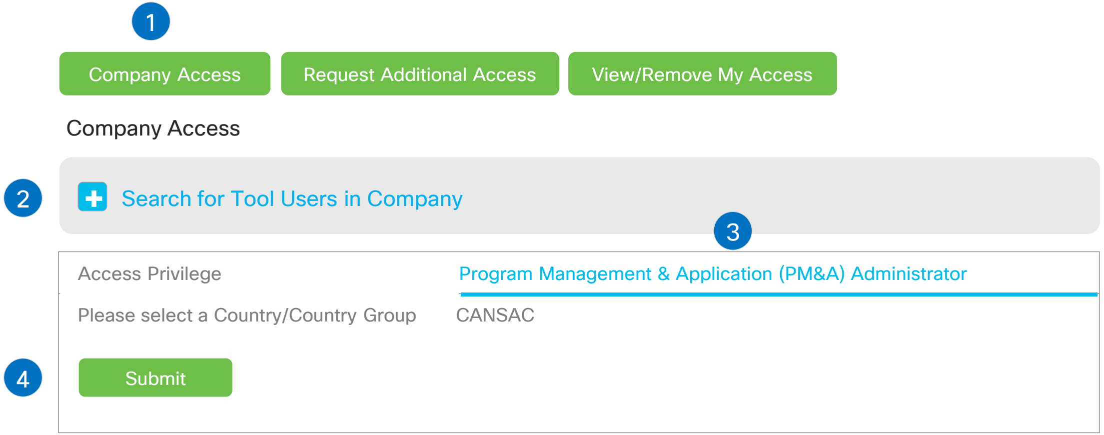
1. Click on Company Access to search for tool users in your company, to search for an individual, and view all contact access.
2. Click on "+" icon to expand section and search. In this example, the user will be searching for tool users in their company.
   - **Specific Individual:** Click here to see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

Important

Here you can 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, Adoption Accountability Planning, or Enterprise Agreement Management Portal (EAMP)

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



5. To edit access, click the Add/Remove Access button.

6. A pop-up screen will appear, un-check / check the checkboxes to revoke or grant access to selected tool Country / Country Group.

7. Click the Next button, proceed to next step.

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

+ Search for an Individual

+ View all Contact Access

Contacts		5
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

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

7 Next | Reset

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

Access Management

Only **PSS Administrator** can complete this task. Click on Access Management task to begin 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

5. Click Add/Remove Access button.

6. A pop-up screen will appear, uncheck / check the checkboxes to revoke or grant access to selected tool Country / Country Group.

7. Click the Next button to receive confirmation of removal, then proceed to next step.

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

+ Search for an Individual

+ View all Contact Access

Contacts		5
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

6 Editing Access For: Tom Johnson

+ Invitation Programs Application — Access Level: Administrator

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

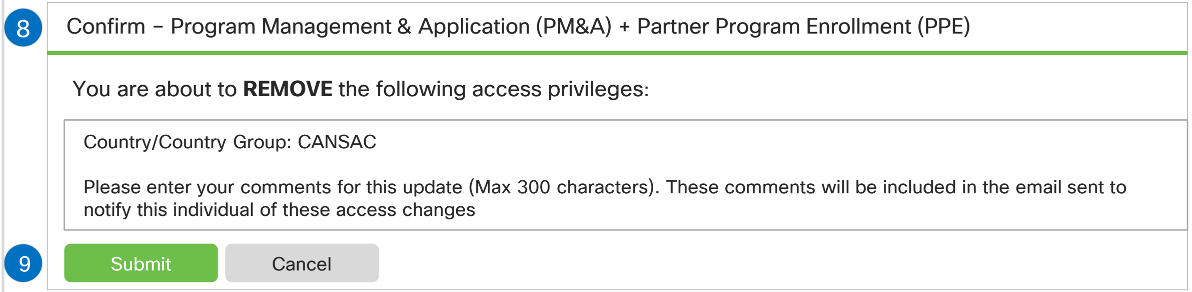
For the checkboxes that appear:
Uncheck any items to remove access or check any items to grant access and click “Next.”

☑ CANSAC

7 Next | Reset

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



Access Management

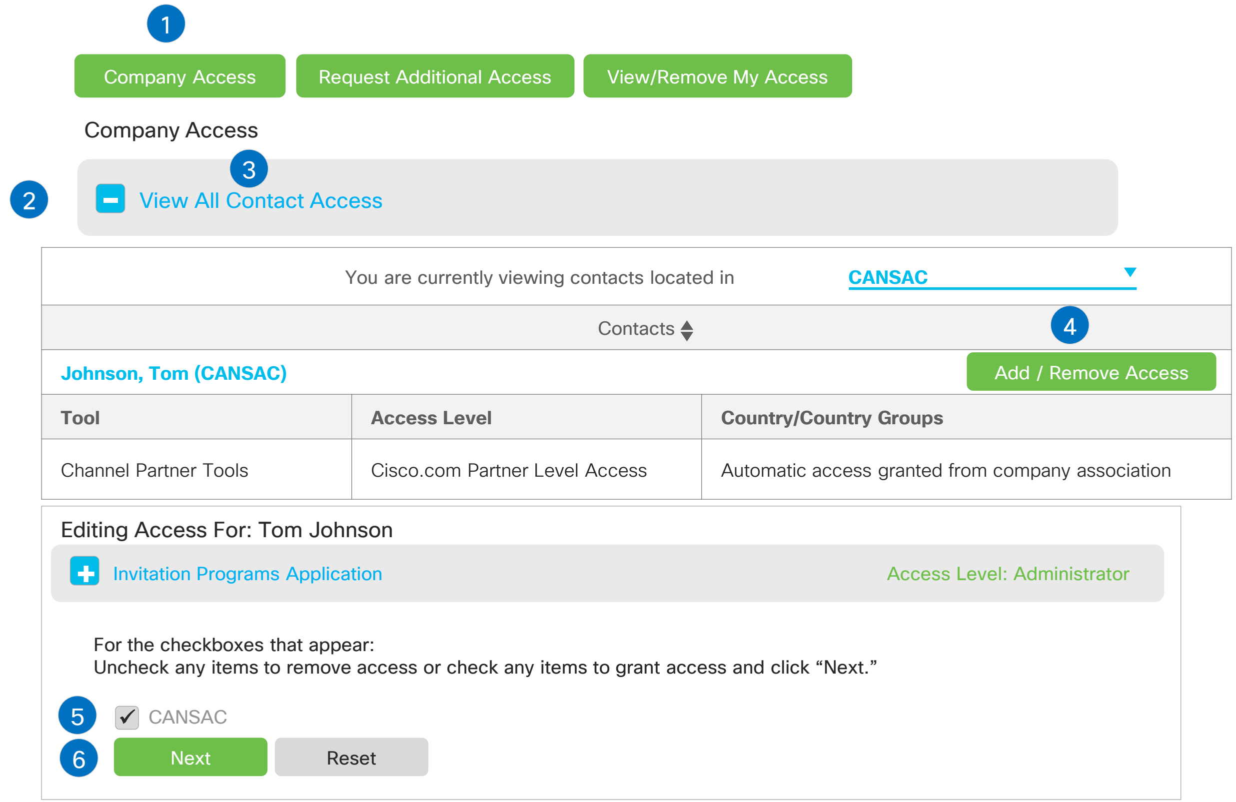
<u>Only</u> **PSS Administrator** can complete this task. Click on Access Management task to begin management.

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 to revoke or grant access to selected tool Country / Country Group.
6. Click the Next button to receive confirmation of removal, proceed to next step.

View and Edit Company Access (View All Contact Access)



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

7 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

8 Submit | Cancel

Access Management

Only **Partner User** and **PSS Administrator** can complete this task. Click on Access Management task to begin 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

Access Management

Only **Partner User** and **PSS Administrator** can complete this task. Click on Access Management task to begin management.

1. Click on View/Remove My Access to view tools you have access to in an expandable format.

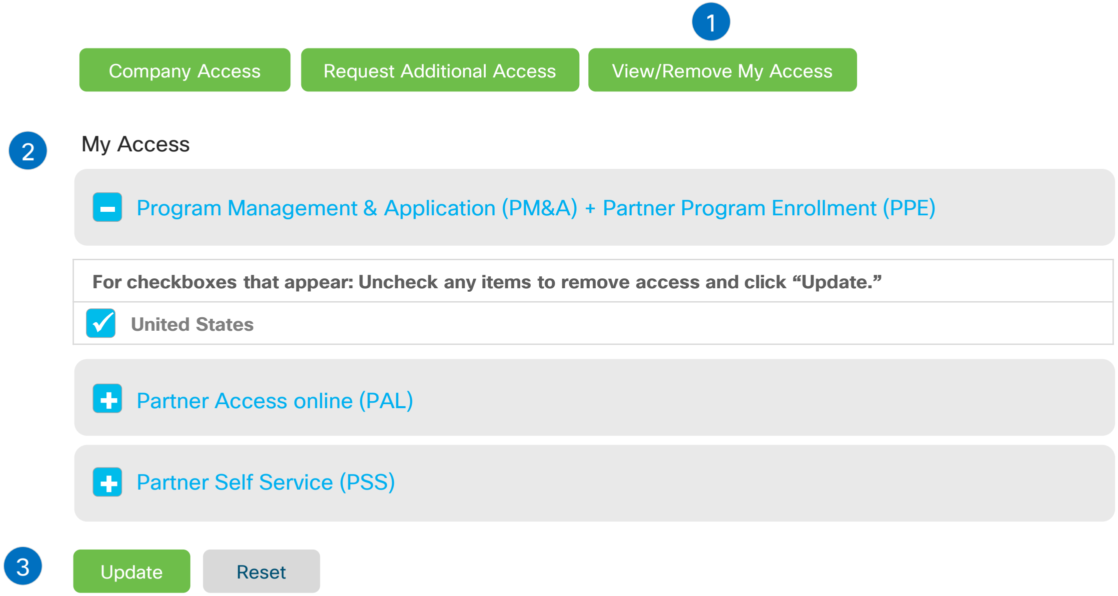
2. Click on "+" icon to expand section and edit tool access level. Uncheck the countries where you want to remove access for that tool.

3. Review and click Update button.

Why do I need to do this?

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



Find My PSS Admin

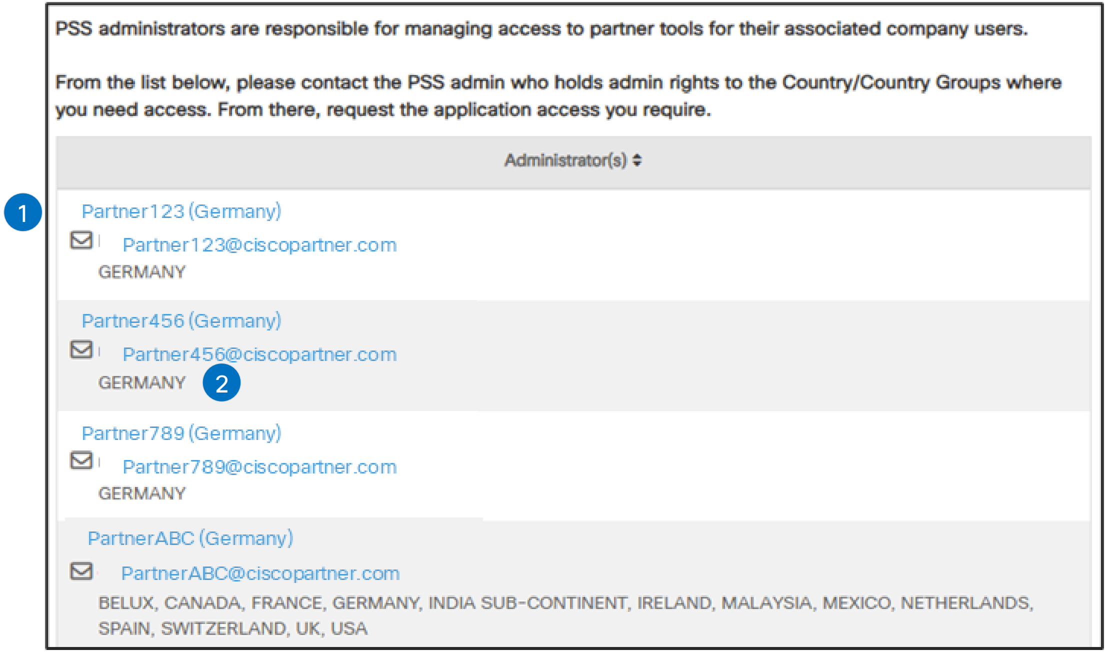
<u>Only</u> **Partner User** and **PSS Administrator** can complete this task. Click on Find My PSS Admin task to begin management.

1. The list of PSS Admin(s) will populate. Look for the PSS Administrator who holds admin rights to your associated Country/Country Groups and if needing access to additional Country/Country Groups, the admin must also hold admin rights to the Country/Groups where you need access. You can browse additional results by going to different pages.

2. Contact the PSS Admin to request the tool access you require.

   For example: If you are associated to the United States profile for your Partner company and you would like PXP tool access for United States, CANSAC, United Kingdom, and Japan. Contact the PSS admin that holds admin rights to United States, CANSAC, United Kingdom, and Japan to help with assigning access.

Find My PSS Administrator



Only **PSS Administrator** can complete this task. Click on Advanced Access Management task to begin management.

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

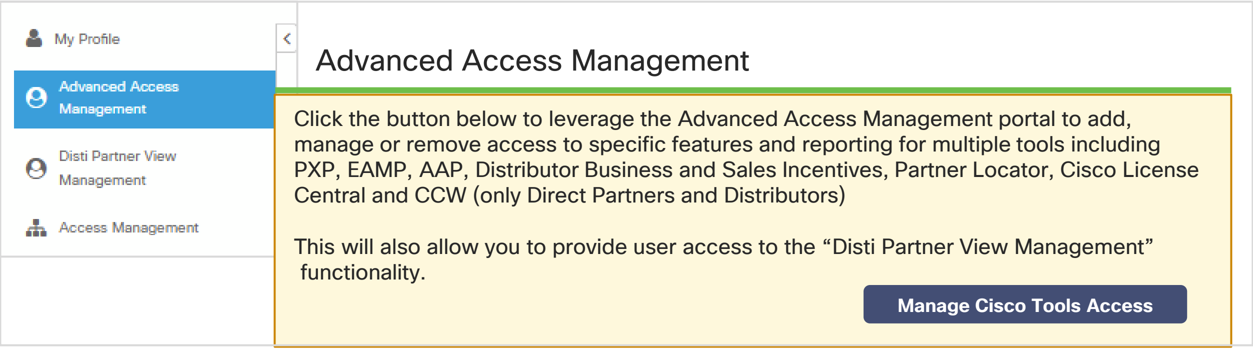
PSS Advanced Access Mgmt. User Guide:

- Partner Experience Platform (PXP)
- Enterprise Agreement Management Platform (EAMP)
- Adoption Accountability Planning (AAP)
- Cisco Commerce Workspace (CCW) - *Only Direct Partners and Distributors*
- Distributor Business, Sales and Incentives Applications
- Partner Locator
- Cisco License Central

Why do I need to do this?

This portal allows you to add, manage, or remove your team's access to the applications listed.

Advanced Access Management



Advanced Access Management

Only **PSS Administrator** can complete this task. Click on Manage Global Administrator Access task to begin management.

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 next steps.

Important

Open a case with Cisco Support if:

- You do not see all countries for your country group you may be experiencing a company mapping issue.
- You do not have a designated Global Administrator for your company.

Manage Global Administrator Access

Manage Global Administrator Access

2

You are the Group Administrator for:

Company Global Access

- Country Group – Australia
- Country Group – Rest of World
- Country Group – European Economic Area

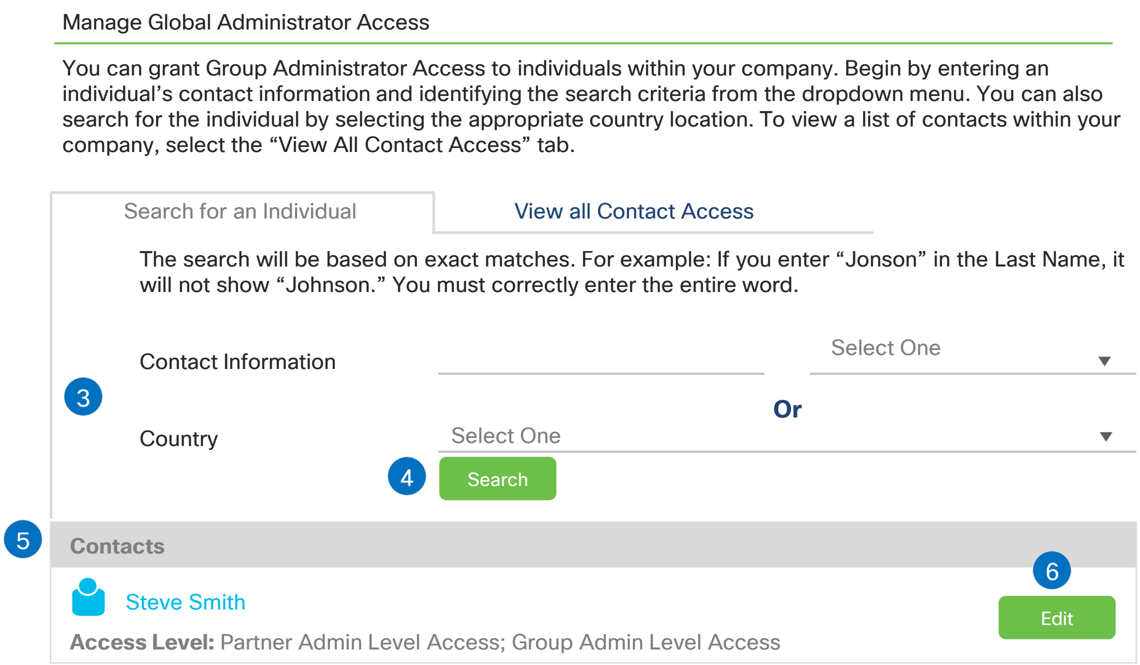
Select a Country Group to view a complete list of the countries in that group. To request or remove Group Administrator access, choose the corresponding button

1

Country Group – Australia	Remove Access
Country Group – Rest of World	Remove Access
Country Group – European Economic Area	Remove Access

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



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, and up to four.
- **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.
- The PSS Administrator and the payment administrator may assign up to four 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 six 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.

Accountable Program Contacts

Only **PSS Administrator** and **Payment Administrator** can complete this task. Click on Accountable Program Contacts task to begin management.

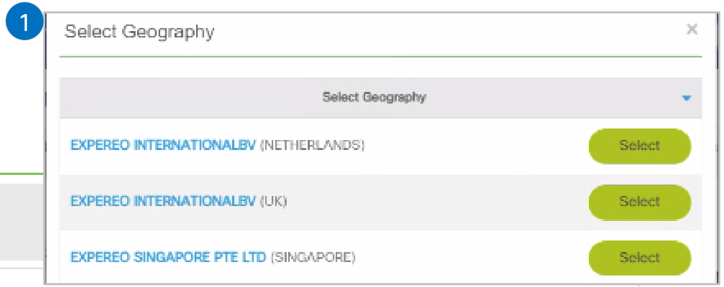
1. Select Geography from pop up menu. The options listed are based on country groups that you manage as a PSS Administrator or assigned to as a Payment Administrator.
2. Click on Accountable Program Contacts to expand and view the list of all assigned contacts for the selected Geography.
3. To delete 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.

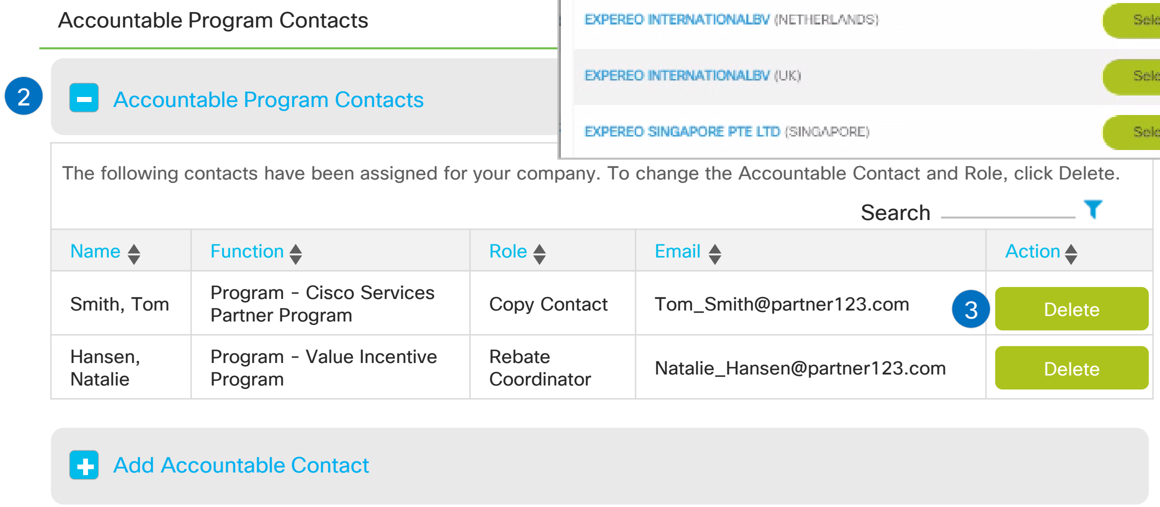
To add Accountable Contact, proceed to steps here.

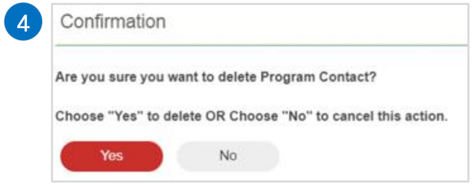
Why this is Critical

Managing the contacts for your company is one of the most critical steps to ensure that you receive vital information. For example, if a rebate coordinator is not assigned to the incentives 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

Only **PSS Administrator** and **Payment Administrator** can complete this task. Click on Accountable Program Contacts task to begin management.

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 next steps.

Important

- 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

Accountable Program Contacts

1

Select Geography

Select Geography

EXPEREO INTERNATIONALBV (NETHERLANDS) Select

EXPEREO INTERNATIONALBV (UK) Select

EXPEREO SINGAPORE PTE LTD (SINGAPORE) Select

2

Accountable Program Contacts

The following contacts have been assigned for your comp

Search

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

3

Add Accountable Program Contact

Complete the following steps to add a Program Contact. You can assi
Program Contact can be associated to a different country group withi

1. Click Search using Name or Cisco.com Id or Email whom you war
2. Select appropriate Role
3. When prompted click “Add” to Save

Search Contacts

4

Search Contacts by Name or Cisco.com Id or E-mail.

Can only search for associated contacts with an active Cisco.com user profile for the country groups that you manage as a PSS admin.

* Last Name — Last Name | First Name — First Name

OR

Cisco.com Id — Cisco.com Id

OR

E-mail — E-mail

Search

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 next steps.

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

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 next step.

Important

As a reminder, you must assign at least one (up to four) 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
Copy Contact 4
Copy Contact 5
Copy Contact 6
Payment Administrator
Program Coordinator
Rebates Coordinator 1
Rebates Coordinator 2
Rebates Coordinator 3
Rebates Coordinator 4

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 additional coordinators (up to four) select the role "Rebates Coordinator 2, 3 and 4."

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

☐ Cisco Partner Incentive

✓ Cisco Services Partner Program (Natalie Hansen)

✓ Cisco Rewards (Natalie Hansen)

9

Add

Manage Other Information

Click to Manage Tasks:

Disti Partner View Management

- Overview

View and Download Reports

- Overview

Cisco Sales Contacts

- Overview

Manage My Reward Programs: There are currently no programs using this feature within the Partner Self Service application.

Only **Partner User** and the **PSS Administrator** can complete this task. Click on Disti Partner View Management task to begin management.

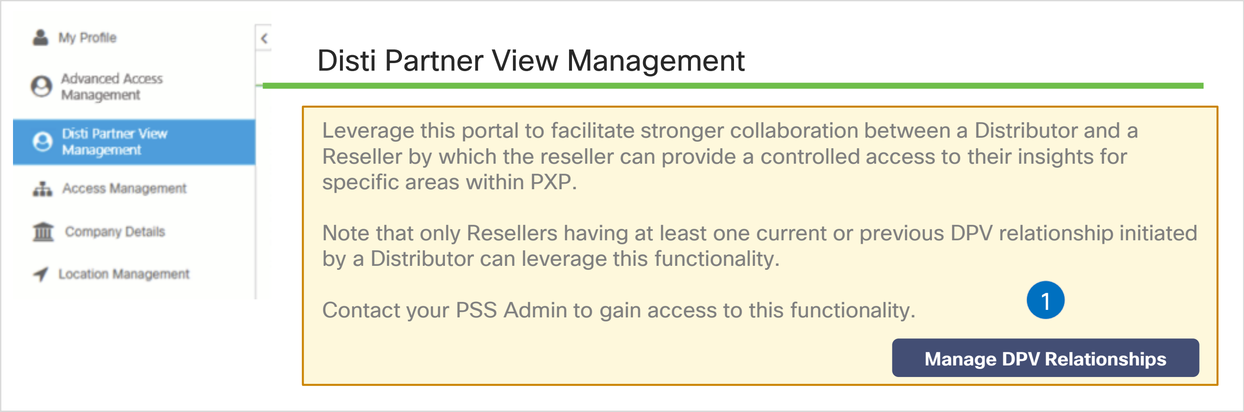
1. Click on Manage DPV Relationships button to manage DPV Relationships.

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.

Important

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



Reports

Only **PSS Administrator** can complete this task. Click on Reports task to begin management.

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 next steps.

View and Download Reports

Reports Partner123 [Change]

Click on the hyperlink to generate a report in Excel. It may take a few minutes for the report to generate. Please do not click on other reports until your previous report is generated

1
- All Cisco Career Certified Individuals
- All Cisco Certified Sales Experts
- All Cisco Certified Network Associates
- All Cisco Certified Network Professionals
- All Cisco Certified Internet Experts
- All Individuals with Cisco.com User IDs
- All Individuals witho
- All Individuals
- WW Partner Qualifi
- WW Cisco Certified
- All Opt In Company
- All Accountable Co

2
- Manage Multiple Contacts Log

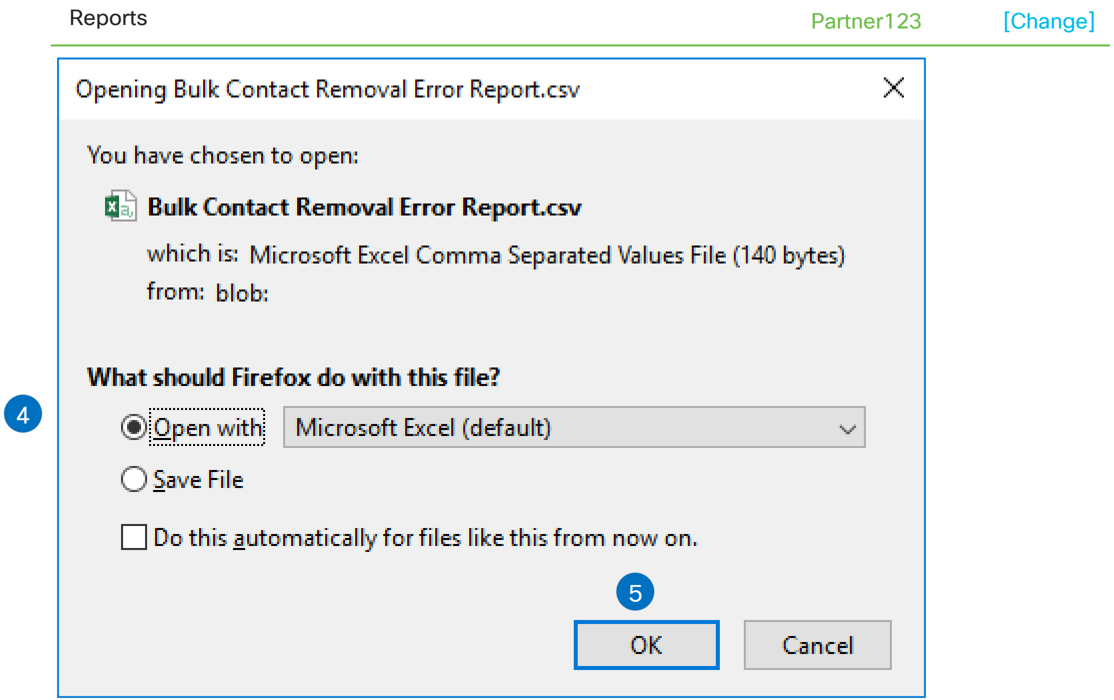
Manage Multiple Contacts Log 3

Action	Number of Contacts	Success Records	Error Records	Submitted On	Submitter CCO ID
Bulk Contact Removal	1	1	0	2023-05-01 22:34:23	tsmith@partner123.com
Bulk Contact Removal	1	1	0	2023-04-29 21:34:23	tsmith@partner123.com

4. Upon selection of the report that 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 menu.

5. Click Ok to open the file.

View and Download Reports – Continued



Cisco Sales Contacts

Only **PSS Administrator** can complete this task. Click on Cisco Sales Contacts task to begin management.

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 Executives 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 Executive 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	PAE	madam@cisco.com	Partner123	United States	CA	San Jose	95131
Mary Adam	PAE	madam@cisco.com	Reseller85	United States	AZ	Phoenix	85001

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.	For more information, refer to the PPE User Guide
• **Login** issues • **Associating** your Cisco.com ID with your company	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