Cisco Services Partner Program
Partner Support Service

QUOTING & ORDERING TRAINING
September 2012
Purpose and Objectives

About the Cisco® Services Partner Program and Partner Support Service (PSS)

Your Transition at a Glance

Protecting Existing Quotes

Pricing and Discounting

Generating a New Cisco PSS Quote After the Migration
  European Economic Area (EEA) Cross-Border PSS Ordering Exception

Contract Management

Getting Support

Additional Resources
Purpose and Objectives

- Explain the effects on the commerce tools of the transition to the Cisco® Services Partner Program
- Introduce Cisco Partner Support Service (Cisco PSS) to the partner quoting and ordering teams
- At the end of this training, you will be able to:

**Plan for the Transition**
- Understand your transition activities
- Understand the unique effects of Cisco PSS on the commerce tools
- Describe pricing and discounting
- Understand the impact the PSS program will have on service delivery tools

**Successfully Order Cisco PSS**
- Generate a new Cisco PSS quote
- Describe how to apply new Cisco PSS product coverage
- Begin considering contract management best practices
- Recognize available support resources

This training is intended to support regular users of Cisco commerce tools. A list of resources for more foundational information on these platforms will be provided in the “thank you” note you will receive after the session, or contact csc-emear-trainingsupport@cisco.com or eea-cspp-ops-questions@cisco.com.
Service-Level Mappings

Current Main Legacy Program

- Shared Support
- Collaborative Tech. Services
- Co-Brand Foundation Bridge

CSPP

PSS

CBS

No Change

* These programs will transition to CSPP/PSS over time.
About the Cisco Services Partner Program and PSS
Cisco PSS Ordering Experience

- Cisco® PSS is designed to use the existing functions of our commerce tools.
- Cisco delivery tools will not be affected by this change.
- Quoting, ordering, contract management, and renewal processes remain largely unchanged.
- Cisco PSS can be ordered using the following tools:
  - Cisco Service Contract Center (CSCC)
  - Cisco Ordering Tool (OT)
  - Cisco Commerce Workspace (CCW)
  - Partner business-to-business (B2B) integrated ordering systems
- No change when ordering Cisco Branded Services.
Service attach at point of order becomes selective

New PSS service SKUs and new price lists

New discount and rebate structure

Partner Support Service replaces Shared Support

Contract numbers may change
Your Transition
At a Glance
What to Expect During the Transition (1)

Before your transition date, Cisco will:

• Add access to Cisco® PSS for your account.

• Update discounts for Cisco PSS and other services as needed.

• Activate the tracking mechanism for rebate calculations and payouts.
After setup:

• You will receive an email stating that the setup is complete.

• You will see the new Cisco® PSS service levels in the Cisco Ordering Tool menus.

• You can immediately start quoting using Cisco PSS service levels (CREATE A TEST QUOTE)

• Shared Support quotes can still be ordered during the transition period (NO ELIGIBLE FOR REBATES)
Important Dates to Remember

- Up to September 30: Shared Support, Cisco® Brand
- October 1: PSS
- From October 1 to November 30: PSS, Cisco Brand, Shared Support
- From December 1: PSS, Cisco Brand
Knowledge Check 1

1. With the introduction of PSS, I will have to be trained on a set of new tools.  **FALSE**

2. From October 1, 2012, I will be able to buy PSS service levels.  **TRUE**

3. The new PSS SKUs will totally replace the old legacy Shared Support SKUs beginning December 1, 2012.  **TRUE**
Protecting Existing Quotes
What is quote protection?

- The period of time after you transition to Cisco® PSS during which all open, validated quotes will continue to be orderable under the original pricing structure.

What is the purpose of quote protection?

- To help reduce disruption to partners' preexisting business during the transition.

Under what conditions are quotes protected?*

- **Cisco Brand** quotes created, validated, and saved up to one day before migration might still be ordered with an FY12 partner’s Cisco Brand Resale discount, either for 60 days OR until November 30, 2012, whichever happens first.

- **Cisco Shared Support** or **Collaborative Technical Support** will still be orderable in any Cisco ordering tool by Cisco partners for a period of 60 days after migration (until November 30, 2012).
Quote Protection Policy for PSS Partners

Join PSS (with or without the Service Sales Discount Incentive [SSDI])

End of legacy FY12 protected discount

Selective Entitlement

FY13 PSS Discount

FY13 Cisco® Brand Discount (35%)

Cisco Brand Resale FY12 Protected Quotes

FY12 Legacy Collaborative Discount (Shared Support)

July 31  Aug 16  October 1  December 1  July 31  October 1

FY12  FY13  FY14
Price Files

• Price files can be used to identify the Cisco® product family coverage available under Cisco PSS.

• Cisco PSS price files can be downloaded.*
  • Partner Support Service price file (contains all pricing except as described here)
  • Unified Computing price file (includes Cisco PSS pricing for Cisco Unified Computing System™)
  • TelePresence price file (includes Cisco PSS pricing for Cisco TelePresence® solution)
  • Cisco Brand price file

• Download often: Price files are published monthly with updates.

* Refer to the Cisco PSS Ordering Guide for download links
Pricing: Operational Readiness

- Cisco® PSS service SKUs will be priced differently than any other service offer.
- Cisco PSS price file uses a new Excel format.
- To prepare to quote and order PSS:
  Update your internal, customized systems or tools to reflect the new Cisco PSS price files.
  Examples: ERP system and Excel spreadsheets with formulas or macros.
- Cisco commerce tools automatically apply correct Cisco PSS pricing.
Partner Discounts

- Discounts are established within the Cisco® Services Partner Program.
- The Cisco Services Partner Program “Resources Index” contains your Performance Management Appendix.
- Partners should refer to this appendix to determine discounts for Cisco PSS and Cisco Branded Services.

Reminder:

Discounts for Cisco PSS and for Cisco Branded Services are different.
Multiyear discounts are automatically applied in Cisco Service Contract Center.

Resources on: www.cisco.com/go/cspp
Knowledge Check 2

1. If I create a Shared Support quote on November 1, I will be able to order it 60 days later.  
   FALSE

2. Beginning December 1, I will be able to place only PSS orders. The legacy Shared Support SKUs will no longer be available.  
   TRUE

3. The PSS price file contains all the prices for each Cisco® service.  
   FALSE
Generating a New Cisco PSS Quote
Cisco PSS Quoting and Ordering

• Cisco® PSS is designed to use the existing functions and processes of our commerce tools.

• In most cases, the primary change will simply be the use of the new Cisco PSS service levels.

• Action: Review service-level defaults in the commerce tools (later in this section).
  • Set default preferences to “PSS” for each Cisco.com user ID.
  • Update each tool separately.

• **Important:** To help ensure that Cisco Services Partner Program metrics and rebates are measured correctly, make sure that the **install location** is set to the end customer information.
Changing Service Default Preferences

• Change default service settings to Cisco® PSS before quoting and ordering.

• Set the service levels for each Cisco.com user ID.

• Each tool must be updated separately.
  • Ordering Tool (OT)
  • Cisco Commerce Workspace (CCW)
  • Cisco Service Contract Center (CSCC)

• Service level automatically defaults to Cisco SMARTnet® setting.

• Remember that it is no longer obligatory to attach Cisco Services at the time of product purchase.
Changing Service Default Preferences in the Ordering Tool

1. Log in to the Ordering Tool or Cisco® Commerce Workspace.

2. Select “Defaults.”

3. Select “Service Options.”
4. Change “Hardware Service Level” from SMARTnet® to PSS.

For a step-by-step guide, go to the job aid located on the Cisco Services Partner Program website:
Changing Default Service Levels in Cisco Commerce Workspace

Option 1

Option 2
Changing Default Service Levels in Cisco Commerce Workspace
Changing Default Service Levels in Cisco Service Contract Center
Access to PSS Offers

• If you see only PSRT in your service level list of values (LOV), make sure you have associated your Cisco.com ID with your company in the Partner Self-Service Tool

Partner Self-Service Tool:
http://tools.cisco.com/WWChannels/GETLOG/welcome.do

Link to User Guide (refer to page 5):
# Cisco PSS Service Levels

<table>
<thead>
<tr>
<th>Service Level Name</th>
<th>Service Level</th>
<th>Service Program Description</th>
<th>Partner Eligibility Restrictions</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSRT</td>
<td>PRTNR SS 8X5XNBD</td>
<td></td>
<td>Available to all Cisco PSS partners OUTSIDE U.S. and Canada</td>
</tr>
<tr>
<td>PSUT</td>
<td>PRTNER SUP 8X5XNBD</td>
<td></td>
<td>Available to all Cisco PSS partners in U.S. and Canada</td>
</tr>
<tr>
<td>PSUE, PSUP, PU2P, PSOE, PSOP, PSO2</td>
<td>8X5X4, 24X7X4, 24X7X2, OS 8X5X4, OS 24X7X4, OS 24X7X2</td>
<td>Cisco Borderless Networks: Hardware support for most Cisco® products</td>
<td></td>
</tr>
<tr>
<td>PSUS, PSUU</td>
<td>SW SUP, SW UPG</td>
<td>Cisco application software update support, Cisco application software update and upgrade support</td>
<td></td>
</tr>
<tr>
<td>PSSD, PSEE, PSSP, PSSW</td>
<td>ESS SW 8X5XNBD, ESS SW 8X5X4, ESS SW 24X7X4, ESS SW</td>
<td>Cisco Essential Operate Service: Unified Communications server and software application support</td>
<td>Available to all Cisco PSS partners</td>
</tr>
<tr>
<td>PSB1N, PSB14, PSB3N, PSB34</td>
<td>PSS SBS 1YR 8X5XNBD, PSS SBS 1YR 24X7X4, PSS SBS 3YR 8X5XNBD, PSS SBS 3YR 24X7X4</td>
<td>Partner Support Service SBS</td>
<td></td>
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<tr>
<td>PSDN, PSEN, PS4N</td>
<td>TP 8X5XNBD, TP 8X5X4, TP 24X7X4</td>
<td>Support for Cisco TelePresence® products</td>
<td></td>
</tr>
<tr>
<td>PSJ1, PSJ2, PSJ3, PSJ4</td>
<td>UCS SUPP 8X5XNBD, UCS SUPP 8X5X4, UCS SUPP 24X7X4, UCS SUPP 24X7X2</td>
<td>Cisco Unified Computing Support Service support</td>
<td>Available to all Cisco PSS partners, but requires additional specializations or Cisco Authorized Technology Provider (ATP) certifications</td>
</tr>
<tr>
<td>PSW2, PSW3, PSW4</td>
<td>UCS W PL 8X5X4, UCS W PL 24X7X4, UCS W PL 24X7X2</td>
<td>Cisco Unified Computing Warranty Plus Service</td>
<td></td>
</tr>
<tr>
<td>PSPN, PSPS</td>
<td>PS 8X5XNBD, PS SW SUP</td>
<td>Cisco Physical Security Service support</td>
<td></td>
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</tbody>
</table>
### Ordering Guide: Transition Help

<table>
<thead>
<tr>
<th>PSS US/C</th>
<th>PSS ROW</th>
<th>CTS US/C</th>
<th>CTS ROW</th>
<th>CSSP US/C</th>
<th>CSSP ROW</th>
<th>CBR</th>
<th>Service Level</th>
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</thead>
<tbody>
<tr>
<td>PSUT</td>
<td>PSRT</td>
<td>CBUT</td>
<td>CBNT</td>
<td>PM2ST</td>
<td>CSSPD</td>
<td>SNT</td>
<td>8X5XNBD</td>
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<tr>
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<td>CBUE</td>
<td>CBNE</td>
<td>PM2SE</td>
<td>CSSPE</td>
<td>SNTE</td>
<td>8X5X4</td>
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<td>CBUP</td>
<td>CBNP</td>
<td>PM2SP</td>
<td>CSSPP</td>
<td>SNTP</td>
<td>24X7X4</td>
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<td>PU2P</td>
<td>CU2P</td>
<td>CS2P</td>
<td>PM2S2</td>
<td>CSSP2</td>
<td>S2P</td>
<td>24X7X2</td>
<td></td>
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<td>PSUS</td>
<td>CBUS</td>
<td>CBAS</td>
<td>PM2S</td>
<td>CSSPS</td>
<td>SAS</td>
<td>SW SUP</td>
<td></td>
</tr>
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<td>CBUU</td>
<td>CBAU</td>
<td>PM2U</td>
<td>CSSPU</td>
<td>SAU</td>
<td>SW UPG</td>
<td></td>
</tr>
<tr>
<td>PSOE</td>
<td>CBOE</td>
<td></td>
<td>PM2OE</td>
<td>C4S</td>
<td>OS 8X5X4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PSOP</td>
<td>CBOP</td>
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<td>PM2OP</td>
<td>C4P</td>
<td>OS 24X7X4</td>
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<td></td>
</tr>
<tr>
<td>PSO2</td>
<td>CBO2</td>
<td></td>
<td>PM2OS</td>
<td>C2P</td>
<td>OS 24X7X2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- The Cisco® PSS Ordering Guide provides tables to help you in your transition quoting.
- Use these tables to translate your existing quoting service levels to Cisco PSS service levels.
Cisco PSS Ordering Exceptions

Guidelines: Multinational Ordering

- Refer to the Multinational Quoting Quick Reference Guide on Partner Central for more information on multinational and cross-border selling of Cisco PSS.
European Economic Area (EEA) Cross-Border PSS Ordering Business Rules

You can sell across borders in Switzerland and the EEA if:

<table>
<thead>
<tr>
<th></th>
<th>Source</th>
<th>Destination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country is within Switzerland and the EEA</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enrolled in Cisco® Services Partner Program</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Cisco PSS eligible</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

**Discount:**
- Discount is based on the certification level at the source location.
- If you meet the specific performance metrics for the Service Sales Discount Incentive (SSDI), you will receive an additional 10% discount.

If a partner is also multinational or globally certified and they are selling to a Global 3100 end customer, they are eligible for the highest discount (42% + SSDI if they qualify).

**NOTE:** You can sell into a country where you do not have a business entity as long as you are selling between two EEA countries.
Temporary Issue with EEA Cross-Border PSS Ordering

If you are selling PSS to an end customer in another EEA country (or Switzerland) where you are not PSS eligible:

- **Ordering Tool**: Orders can be made as usual.
- **Cisco® Service Contract Center**: An error message may appear. Until the fix is deployed, please request a manual override (details in the next slides).
- **Cisco Commerce Workspace**: Please use the Ordering Tool for PSS quotes until a fix is in place. If the OT is no longer available, use the CCW and switch to the Shared Support service levels while we fix the issue.
- The fix is currently planned to be deployed by the end of 2012.
- This issue affects only orders involving PSS service levels.
EEA Cross-Border PSS Ordering Error Message

Error Message SCASL1002
Received when you are not Cisco PSS eligible at the destination.
Open a case in Cisco® Service Contract Center.

Click the Service Programs and Acquisitions radio button.

Choose the option CSPP-EEA Cross Border Selling Override.
Contract Management
Managing Existing Contracts

Main Points About Managing Existing Contracts

• Best practice: Convert legacy Shared Support contracts to the new PSS at the time of renewal.

• You **can** maintain the existing contracts until the time of renewal as long as there are no changes to the contract that affect costs (for example, a return materials authorization [RMA] swap).

• You **cannot** add new devices to the existing contract that require quoting (devices that require a service-level purchase).

• Adding a quotable new device on the existing contract may require moving the entire configuration to a new Cisco® PSS contract.
Steps for Renewing Existing Contracts

To convert to Cisco® PSS at your normal renewal time:

1. Create a new quote.
2. Update your default preferences to Cisco PSS service level.
3. Import lines from existing contract.
4. Ensure that the installed site is the actual end customer.
5. Set the duration of the contract.
6. Validate.
Renewal and Contract Number Changes

• The basic rule: All items on a contract must have a common (compatible) service level.

• When changing from legacy Shared Support to PSS:
  - Upgrade the quote.
  - If all lines are renewed at the same time → same contract number.
  - If only some products are upgraded → a new PSS contract number will be generated for these products.

• From the moment one component is upgraded to PSS, the entire network benefit of smart services.
Best Practices for Contract Renewal

- Update contract details at the time of renewal.
- Co-terminate end dates.
- Consolidate contract numbers.
- Use the Quote Upload template at the time of renewal.
  - Check the Service Availability Matrix (SAM) tool.
  - Only eligible PSS sites to PSS contracts are allowed.
- If editing install site IDs before renewal:
  - Validate the new site in SAM
### Example of Quote Upload Template

<table>
<thead>
<tr>
<th>SERIAL NUMBER</th>
<th>ITEM NUMBER</th>
<th>SITE ID</th>
<th>SITE NAME</th>
<th>ADDRESS</th>
<th>ADDRESS</th>
<th>ADDRESS</th>
<th>COUNTRY</th>
<th>SERVICE LEVEL</th>
<th>BEGIN DATE</th>
<th>END DATE</th>
<th>TARGET CONTRACT NUMBER</th>
<th>SOURCE CONTRACT NUMBER</th>
<th>PURCHASE ORDER NUMBER</th>
<th>SALES ORDER NUMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

- **Site ID** can be modified at the same time as renewal is quoted.
- **End date** can be co-terminated at the same time as renewal is quoted.
- **Contract number** can be modified at the same time as renewal is quoted.

---

**NEW**

- Copy Existing

---

**NEW**

- Copy Existing
Editing Site IDs Before Renewal

• If adding a new site ID or editing an existing site ID on a legacy contract, the following error message may appear:

• To ask for an error override, please submit a support case with SCC.
Editing Site IDs Before Renewal
Opening a Case

Open a case in Cisco® Service Contract Center.

Click the Cisco Service Contract Center radio button.

Choose the Contract Management option.

Choose Move.

Finally, choose Site and To Another Site.
Knowledge Check 3

1. I have to change my default service levels every time I log in to the Cisco® Ordering Tool.
   **FALSE**

2. As a best practice, Cisco recommends that I wait until the time of my contract renewal to convert my legacy Shared Support contracts to the new PSS service offering.
   **TRUE**

3. To help ensure that Cisco Services Partner Program metrics and rebates are measured correctly, I must make sure that the install locations are set to the end customer information.
   **TRUE**
Getting Support
Before Opening a Case

• Cisco® PSS Ordering Guide
  Covers the topics discussed here in more depth
  Go to the PSS website, navigate to the Collaborative Technical Services tab, and then find the document in the “Operations” section

• Cisco Operations Exchange Community
  Accessible from Cisco SCC site
  Contains up-to-date articles and documentation
  Has forums moderated 24 hours a day, 5 days a week

• Your Cisco partner services development manager and Cisco PSS business development manager are also there to help
Support for Quoting and Ordering
Cisco Operations Exchange Community
Support for Quoting and Ordering
Cisco Service Support Center

Open a case.

Click the Service Programs and Acquisitions radio button.

Choose Cisco® Partner Support Service (PSS) or Cisco Services Partner Program (CSPP)
Support for Quoting and Ordering
Cisco Commerce Workspace

Create a case.

Include **CSPP** in the case title.

Click **Submit**.
Support for Quoting and Ordering
Cisco Ordering Tool

Please contact your CRSM or follow the case creating process that you normally follow.
Main Points

- Cisco® PSS quoting and ordering is essentially “business as usual.”
- Prepare your internal systems to use the new Cisco PSS pricing.
- Update your Cisco.com IDs with the correct service-level defaults.
- Create a test quote as soon as possible after October 1.
- Wait until renewal before converting contracts to Cisco PSS.
- Use your usual channels to get quoting support.
- Use the Cisco PSS Ordering Guide as the primary source of information.
- Use this presentation and all the training materials available to help you.
Resources

EEA, Israel, Switzerland, and South Africa Specific Training Materials:

• **Partner Tip Sheet**: Key document, containing all of the resources you need, including links to all below.
  - CSPP Questions and Answers
  - PMC VoDs (look on the partner tip sheet, page 18)
  - EEA Cross Border PSS Ordering VoD
  - Quote Protection VoD

Global Training Materials:

• Cisco® PSS Ordering Guide
• Cisco Services Partner Program Operations Guide
• PSS Quick Reference Guide
• Cisco Service Contract Center website
• Cisco Service Contract Center Managing Contracts
• PSS Multinational Quoting and Cross-Border Selling Quick Reference Guide
• Partner Self-Service Tool
• Partner Self-Service Tool User Guide

Your Contact for Any Training-Related Questions:

• eea-cspp-ops-questions@cisco.com

Program-Related Questions:

• Please contact your partner services development manager.
Thank you.