Partner Self Service
User Guide

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

The buttons above are active and will take you to the section of this guide where you can manage your information. By clicking the "Table of Contents" button, you will have access to a list of all of the sub-sections of the buttons above.

In addition to an overview of the general processes and capabilities, the guide provides information for obtaining partner level access for managing your information and maintaining company data, access, and associations.

Important: Always refer to the English version as the most current version. In the event of a discrepancy between a translated version of the document and the English version of the document, the English version prevails.

Access to PSS Application
To access the application, you must complete two steps:

1. **Obtain a Cisco.com User ID and password.** Refer to: https://idreg.cloudapps.cisco.com/idreg/register.do to create your ID. Once completed, you will receive an email confirming your confirming your Cisco.com User ID creation.

2. **Obtain partner level access.** This can be completed by associating your profile with your partner company. Refer to the "Associate Myself with a Company" section for the steps to complete this task.

Manage
To begin managing your information: www.cisco.com/go/PSS

Getting the Most out of Managing Your Information

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

- My Profile
- Access Management
- Company Details
- Location Management
- Contact Management
- Association Requests
- Accountable Program Contacts
- Reports
- Manage My Reward Programs
- Cisco Sales Contacts

Task Navigation Menu

User Definitions

Why this is important:

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

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

Click this task to navigate to:

[User definitions](#)

About Users – What Are the Tasks They Can Do?

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

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

- Associate Myself with a Company

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

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

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

- Manage My Profile
- Access Management (i.e. For viewing and _granting access to_ partner tools administrator access to others (i.e. TPV admin access, PSS admin access, PM&A + PPE, etc.)
- Manage My Reward Programs
- View Cisco Sales Contacts
- Company Details
- Location Management
- Contact Management

- Association Requests
- Accountable Program Contacts (i.e. Assign rebate coordinator(s), program coordinator(s), and payment administrator(s))
- View and Download Reports
- Manage Corporate E-mail Domains
- Global Administrator (Can manage multiple geographies)
- Distributor Details (Only for Partner Admins of 2-Tier companies)

Manage

To begin managing your information: www.cisco.com/go/PSS

Associate Myself with a Company

Why this is important:

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

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

Click this task to navigate to:

[Work Instructions](#)

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

Click on task: [Associate Myself with a Company]
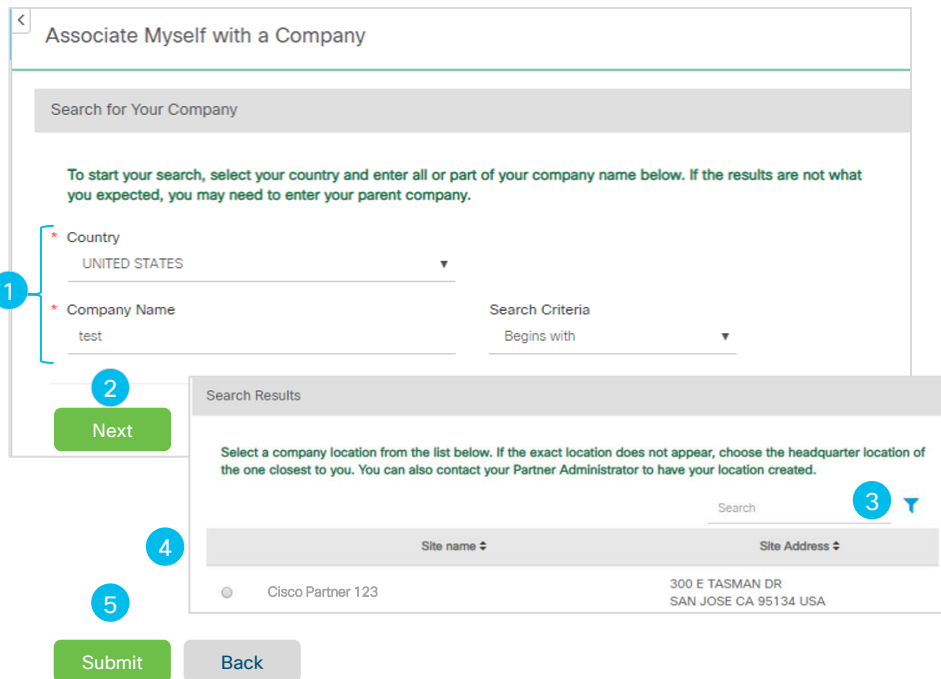
1. Fill in Company Details

2. Click "Next"

3. Click "Search" icon to display list of addresses

4. Click on radio button for company selection

5. Click "Submit" button to proceed to next page

Why do I need to do this?

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

Associate Myself with a Company

Associate Myself with a Company

Search for Your Company

To start your search, select your country and enter all or part of your company name below. If the results are not what you expected, you may need to enter your parent company.

* Country
UNITED STATES ▼

* Company Name
test

Search Criteria
Begins with ▼

Next

Search Results

Select a company location from the list below. If the exact location does not appear, choose the headquarter location of the one closest to you. You can also contact your Partner Administrator to have your location created.

Search ▼

	Site name ⬍	Site Address ⬍
○	Cisco Partner 123	300 E TASMAN DR SAN JOSE CA 95134 USA

Submit   Back

Only the **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

⚠️

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.

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

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Click to Navigate to Work Instructions

Edit Basic Profile Information

Change Associated Location

Change / Remove
Company Association

Delete Additional Cisco.com User IDs

Add Cisco Testing
to Your Profile

Receive
Cisco Communications

Edit Basic Profile Information

Why this is important:

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

Click to navigate to:

[Work Instructions](#)

[Update Email](#)

Only the **Partner User** and **PSS Administrator** can complete this task:
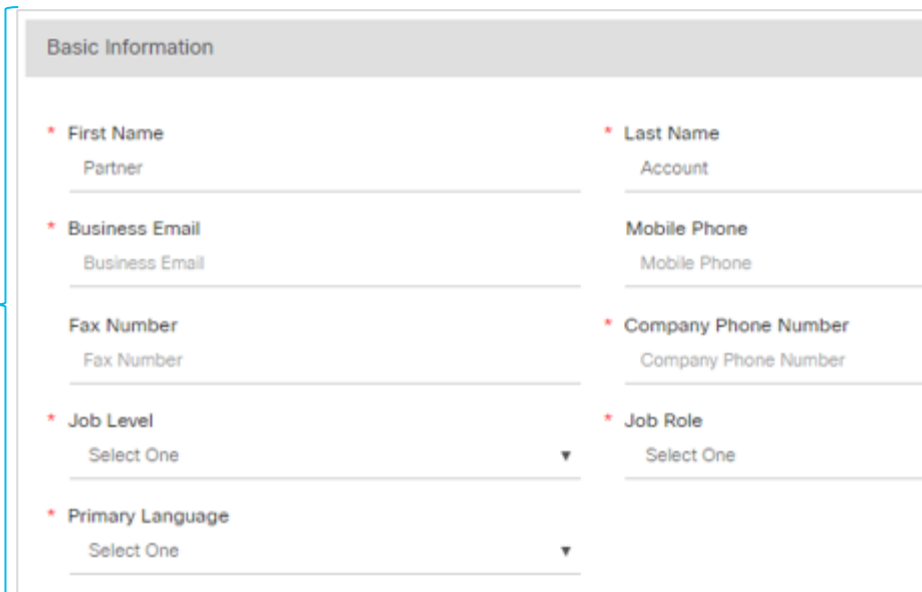
Click on task: 👤 **My Profile**

1. Edit "Basic Information" section

2. Review and click "Submit" button, and a pop-up menu confirming your update will appear

3. When prompted,

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

Basic Information

* First Name
Partner

* Last Name
Account

* Business Email
Business Email

Mobile Phone
Mobile Phone

Fax Number
Fax Number

* Company Phone Number
Company Phone Number

* Job Level
Select One ▼

* Job Role
Select One

* Primary Language
Select One ▼

Submit   Back

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

Click on task: 👤 My Profile

1. Edit "Business Email" field

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

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

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

Update Email

Please Confirm Your Email Address

Updating your profile with the email address you have provided will require you to validate this e-mail address. Please close this message and click the submit button for your email address update to be submitted. Once submitted, go to your inbox of the new email address and click on the URL provided. You will not be able to log-in to Cisco.com until you have completed this process. If you have questions or need further assistance, please open a "Partner Tools" support case via the Customer Services Hub.

Basic Information

* First Name
Partner

* Business Email
Business Email

Mobile Phone
Mobile Phone

Fax Number
Fax Number

* Company Phone Number
Company Phone Number

* Job Level
Select One ▼

* Job Role
Select One

* Primary Language
Select One ▼

Submit   Back

Change Associated Location

Why this is important:

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

Click to navigate to:

Work Instructions

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

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

Click on task: 👤 **My Profile**

1. Scroll to the "Business Address" section, then "Change Location" section in the pop up menu that has opened

2. Click on "Change Location" link, proceed to step 3

Why do I need to do this?

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

Change Associated Location

1

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

2

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

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

3. Click on "Change Location" button in the pop-up menu

4. Choose any of the radio buttons corresponding to the address of your new location

5. Review, then click the "Submit" button, a pop-up screen will appear confirming your request

Change Associate Location - Continued

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

3 Change Location

To change locations, select a new location from the following list:
Site Name ⬍
○ **Partner123,** 456 Cisco Way, San Jose, CA 95131, United States
○ **Partner123,** 2727 Palm Tree Way, San Jose, CA 95128, United States
○ **Partner123,** 9000 Catalyst Way, Milpitas, CA 95132, United States

5 Submit

Change / Remove Company Association

Why this is important:

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

Click to navigate to:

Work Instructions

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

Click on task: **My Profile**

1. Scroll to Business Address

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

Why do I need to do this?

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

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

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

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

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

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

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Delete Additional Cisco.com User IDs

Why this is Important:

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

Click to navigate to:

Work Instructions

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

Click on task: 👤 **My Profile**

1. Scroll to "Business Address"

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

Why do I need to do this?

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

Delete Additional Cisco.com User IDs

1

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

2

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

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

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

Important

The check boxes are pre-selected for you and not modifiable.

This action will not affect any Individual qualifications you may have linked to your PSS profile based on your CSCO testing ID connection.

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

Delete Additional Cisco.com User IDs - Continued

Delete Additional Cisco.com User IDs

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

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

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

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

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

③ Yes, delete the additional user IDs

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

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Add Cisco Testing to Your Profile

Why this is important:

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

Click to navigate to:

Work Instructions

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

Click on task: 👤 My Profile

1. Scroll to "Cisco Testing Information" section

2. Add "Cisco Test ID" corresponding to your profile

3. Click on "Submit" button. A confirmation message will be displayed.

Adding Cisco Testing Information to Your Profile

1

Cisco Testing Information

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

Cisco Testing ID (CSCO#)

2

Cisco Testing ID (CSCO#)

{For example: CSCO12345}

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

Cisco Communications

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

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

3   Submit

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Receive
Cisco Communications

Why this is important:

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

Click to navigate to:

Work Instructions

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

Click on task: 👤 **My Profile**

1. Scroll to "Cisco Communications" section.

2. Choose your preference by selecting the corresponding Radio button. (Mandatory)

3. Clicking Yes, a menu of options will display. Here you can select or deselect previous selections. Clicking No, all previously selected options will be disabled.

4. Click on "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**

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.

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

3 | **Please select the areas that are of interest to your business**

Technology Interests	Collaboration	Data Center/Virtualization
☐ Cloud	☐ Internet of Everything (IoT)	☐ Mobility
☐ Enterprise Networks	☐ Services	☐ ACI
☐ Security		

(Technology Interests ☐, Collaboration ☐, Data Center/Virtualization ☐)

4 Submit

Manage My Company

Click to Navigate to Work Instructions

Company Details   Location Management   Contact Management

Company Details

Why this is important:

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

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

Click to navigate to:

Work Instructions

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

Click on task: 🏛 Company Details

1. A pop up window will appear that lists the different registered companies

2. Click "Select" button to choose the company you would like to update

3. In the "Business Information" section you should be able to update:

   • Corporate Web Address
   • Federal Tax
   • VAT Number
   • Email Domain Name
   • Company Description

4. Click "Submit" button to save changes, proceed to step 5

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

Company Details

1 Search Company

Select Company and Geography **2** ▼

Partner123 (United States)   [Select]

👥 Number of Contacts: 89
🌐 Number of Locations: 6

Company Details	Partner123 United States	[Change]
Business Information		

3

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

4   [Submit]

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

5. As you scroll down through the "Company Details" section, you will be able to view your:

- Registration Status
- Application Details
- Agreement Dates and Timelines

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

Company Details - Continued

⑤

Registration Status	Agreement Dates Timeline

Application ID: 123456

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 Expiration Date
14-May-2021

Agreement Effective Date
15-May-2020

Agreement Approved Date
15-May-2020

Agreement Signed Date
15-May-2020

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

6. As you scroll down through the "Company Details" section, you will be able to view your:

- Certifications
- Specializations
- Authorizations
- Last Approval Date
- Renewal Due Date

Important

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

Company Details - Continued

⑥ Partner Certification/Specialization/Authorizations

Search 🔻

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

Location Management

Why this is important:

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

Click to navigate:

Search Locations

Add Location

Edit Location

Delete Location

Display Your Company in the Partner Locater Application

Designate HQ Location

Display Channel Account Team

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

Click on task: ➤ Location Management

1. Here you can manage the location of your company's offices within the selected country. All site locations will be displayed

2. If you would like to filter for specific locations, click the "Search Locations" button

3. A pop-up menu will appear, enter your search criteria and click the "Search" button, and your results will be displayed

Search Locations

2

| Search Locations | Add Another Location |

1 Location ▼

Partner123

123 Argentina Circle
Santo Domingo
Dominican Republic
Phone Number: 809-567-5140
Date Added: May 10, 2020

☐ Show in Partner Locater

Channel Account Team   👥 Contacts (6)

Partner123

9000 Catalyst Way
Milpitas, CA 95134
United States
Phone Number: 408-555-4567
Date Added: May 10, 2020

☐ Show in Partner Locater

Channel Account Team   👥 Contacts (6)   ⊙ Make HQ   ✏ Edit Location   🗑 Delete Location

Search   **3**   ✕

Country/Country Group	Select One ▼
Site Name	Select One ▼
Site Criteria	Select One ▼
City	
Postal Code	
State/province	

Search

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

Click on task: `✦ Location Management`

1. Click "Add Another Location" button to add an additional location

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

3. Click the "Search" button for a list of available locations, proceed to step 4

Add Location

Location Management   Partner123   [Change]

| To more easily find your location ▼ filter this list. | Search Locations | Add Another Location | ①
|---|---|---|

② | Add Another Location (Search) | Back | Add Another Location |

To add another location for your company, begin by entering the company information for that location then choose "Search:"

*Country	Select One	▼ ⓘ
*Site Name		
*Address 1		
City		
State		
Postal Code		

③ Search

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

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

5. Click "Add" link

6. You will receive a confirmation message

Add Location - Continued

4 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 ○

5 Add

6 Message ✕

Please allow 24 hours to reflect in Partner Locator.

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

Click on task: 🧭 Location Management

1. Your locations will be displayed

2. Click "Edit Location" link, under the location you would like to edit. Proceed to step 3

Edit Location

[Search Locations]   [Add Another Location]

① Location ▼

Partner123

123 Cisco Way
San Jose, CA 95131
United States
Phone Number: 408-555-1212
Date Added: May 10, 2020

☐ Show in Partner Locater

Channel Account Team   👥 Contacts (6)   ◎ Make HQ   **②** ✏️ Edit Location   🗑 Delete Location

Partner123

9000 Catalyst Way
Milpitas, CA 95134
United States
Phone Number: 408-555-4567
Date Added: May 10, 2020

☐ Show in Partner Locater

Channel Account Team   👥 Contacts (6)   ◎ Make HQ   ✏️ Edit Location   🗑 Delete Location

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

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

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

Edit Location - Continued

③ Update Site

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

④ Update

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

Click on task: 🧭 Location Management

1. He 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

To more easily find your location 🔻 filter this list.

Add Another Location

Location ▼

Partner123

123 Cisco Way
San Jose, CA 95131
United States
Phone Number: 408-555-1212
Date Added: May 10, 2020

☐ Show in Partner Locater

👥 Contacts (20)   ○ Make HQ   ✏️ Edit Location   🗑 Delete Location

Partner123

9000 Catalyst Way
Milpitas, CA 95134
United States
Phone Number: 408-555-4567
Date Added: May 10, 2020

☐ Show in Partner Locater

👥 Contacts (20)   ○ Make HQ

Are you sure you want to proceed?   x

You must move or delete all contacts at this location before you can delete it.

To continue with deleting this location, choose "Yes" and the contacts at this location will be displayed. Move or delete all of the contacts then return to the "Location Management Menu" and choose "Delete" for this location.

To cancel this action, choose "No".

Yes   **No**

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

Click on task: ✈ Location Management

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

2. You will receive an automated confirmation message

Important

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

Display Your Company in the Partner Locator Application

Search Locations   Add Another Location

Location	▼

Partner123

123 Cisco Way
San Jose, CA 95131
United States
Phone Number: 408-555-1212
Date Added: May 10, 2020

1 ☑ Show in Partner Locater

Channel Account Team   👥 Contacts (6)   ⊙ Make HQ   ✏ Edit Location   🗑 Delete Location

Partner123

9000 Catalyst Way
Milpitas, CA 95134
United States
Phone Number: 408-555-4567
Date Added: May 10, 2020

2

Message
Your additional location has been added. It may take up to 6 hours for the information to display in applications like the Cisco Partner Locator

☐ Show in Partner Locater

Channel Account Team   👥 Contacts (6)   ⊙ Make HQ   ✏ Edit Location   🗑 Delete Location

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

Click on task: ⬈ Location Management

1. Review the list of locations presented and click the "Make HQ" link for the location you would like to designate as your HQ location

2. You will receive a confirmation message

Designate HQ Location

Search Locations   Add Another Location

Location ▼

Partner123

123 Cisco Way
San Jose, CA 95131
United States
Phone Number: 408-555-1212
Date Added: May 10, 2020

☐ Show in Partner Locater ①

Channel Account Team 👥 Contacts (6) ⊙ Make HQ ✏ Edit Location 🗑 Delete Location

Partner123

9000 Catalyst Wa...
Milpitas, CA 9513...
United States
Phone Number:
Date Added: Ma...

☐ Show in Partner Locater

Channel Account Team 👥 Contacts (6) ⊙ Make HQ ✏ Edit Location 🗑 Delete Location

Message ② ✕

Please allow 24 hours to reflect in Partner Locater.

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

Click on task: Location Management

1. Review the list of locations presented and click the "Channel Account Team" link to display team members

2. Your Cisco Channel Account Team will be displayed with their Cisco emails and roles

Display Channel Account Team

Search Locations | Add Another Location

Location	▼

Partner123

123 Cisco Way
San Jose, CA 95131
United States
Phone Number: 408-555-1212
Date Added: May 10, 2020

2

☐ Show in Partner Locater

1 Channel Account Team   👥 Contac[   ] Delete Location

Channel Account Team

Tsmith (ICAM)

Nhansen (Partner Development Manager)

Vrosado (CAM)

Partner123

9000 Catalyst Way
Milpitas, CA 95134
United States
Phone Number: 408-555-4567
Date Added: May 10, 2020

☐ Show in Partner Locater

Channel Account Team   👥 Contacts (6)   ⦿ Make HQ   ✎ Edit Location   🗑 Delete Location

Table of Contents

User Definitions

Associate Myself
with a Company

Manage
My Profile

Manage
My Company

Manage
Access Requests

Manage
Other Information

Support &
Resources

Contact Management

Why this is Important:

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

Click to navigate to instructions:

Search Contacts

Add Contacts

Edit Contacts

Delete Contacts

View Career Certifications

Move Contacts to Another Location

Remove and Move Contacts to Another Location for Multiple Contacts

Bulk Contact Removal

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

Click on task: Contact Management

1. Your "Contacts" will display. Within the "Contacts" tab, you will be able to perform the following tasks:

   • Search Contacts
   • Search Contact Type
   • Add Contact
   • Move Contacts to Another Location
   • Add Contact Type
   • Delete Contacts
   • Qualifications (will only appear if you have a testing ID #)

2. Click the "Search Contacts" button, then proceed to step 3

Search Contacts

Contact Management   Partner123   [Change]

① Contacts   Manage Multiple Contacts ②

Search Contacts   Search Contact Type

Contacts

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

Tom Smith

Email: Tsmith@partner123.com
Phone: 408-555-1212
Cisco.com User ID: tomsmith123
Administrator Access Privileges: Program Management & Application (PM&A) + Partner Program Enrollment (PPE), Partner Self Service (PSS), Partner Access online (PAL)

🌐 Move Contacts to Another Location   ➕ Add Contact Type   🗑 Delete Contacts

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

3. A pop-up menu will appear where you can use different search queries to search for a contact who is associated with your company in our partner data base. You can search using these criteria:

    •   Identifier: Cisco Testing ID (CSCO#, CCIE#, Cisco.com ID, Email ID, **or**

    •   Individual Certificate, or Certification Category, **or**

    •   Individual Access and Responsibilities, **or**

    •   Contact First and Last Name, **or**

    •   By viewing all contacts who are associated with your company

4. Once you have made your selection, click the "Search" button to view all contacts associated with your company. Proceed to Step 6.

5. Click the "View All Contacts" button to view all individuals associated with your company.

Search Contacts – Continued

③   Search Contact (Enter your preferred search criteria)   Partner123   [Change]

Search on an Identifier

Cisco Testing ID (CSCO#)   _____

CCIE #   _____

Cisco.com User ID   _____

Email ID   _____

                                    OR   [Search] ④

Search on Individual Certification OR Certification Category

Individual Certification   Select One ▼

Certification Category   Select One ▼

                                    OR   [Search]

Search on Individual Access and Responsibilities

Responsibility   Select One ▼

                                    OR

Search on Name

First Name   _____

*Last Name   _____

                                    OR   [Search]

View all Contacts for Your Company
This option lets you view all individuals associated with your company. Clicking "View All Contacts" multiple times may cause a delay in loading the page.   ⑤   [View All Contacts]

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

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 |

Tom Smith

⑥ **Email:** Tsmith@partner123.com
Phone: 408-555-1212
Cisco.com User ID: tomsmith123

🌐 Move Contacts to Another Location   ✚ Add Contact Type   🗑 Delete Contacts

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

Click on task: [Contact Management]

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

Add Contacts

Contact Management

Partner123 (USA)   [Change]

| Contacts | Manage Multiple Contacts |

[Search Contacts]   [Search Contact Type]

Contacts

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

1 [Add Contact]

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

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

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

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

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

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

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

Add Contacts - Continued

2 Add Contact – Profile Information

Search Contact	
Cisco Testing ID (CSCO#)	
CCIE#	
*Cisco.com ID	

3 Search

Location/Contact Information	🔍 Search Again
*First Name	John
*Last Name	Smith
*Job Role	Select One ▼
*Job Level	Select One ▼
*E-mail Address	
*Phone Number	
Phone Extension	
Fax Number	
Mobile Phone	
*Primary Language	English

5

Message	✕
Email has been sent to the user. Pending company association request has been created.	

4 Add Contact   Cancel

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

Click on task: [Contact Management]

1. Clicking on any contact name will open a pop-up menu with their profile details. Here you can review and update their profile. You should be able to review and update the contact's Basic Information. Please ensure a valid corporate email domain is used for the Business Email address.

2. Review the contact's location

3. By clicking the "Submit" button, you can update the user's Basic Information

4. If available, add Cisco Testing ID for the contact and click "Submit"

Edit Contacts

Profile Information

① Basic Information

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

② Business Address

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

③ [Submit]

Cisco Testing Information

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

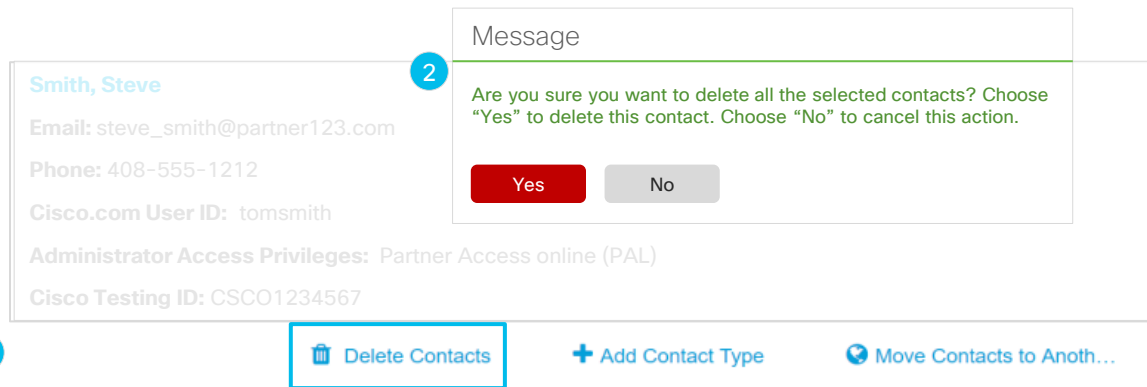| Cisco Testing ID (CSCO#)	Cisco Testing ID (CSCO#)
If you have more than one CSCO#, click **here.**	(For example: CSCO12345678)

④ [Submit]

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

Click on task: 👥 Contact Management

1. Click the "Delete Contacts" icon

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

Delete Contacts

Smith, Steve

Email: steve_smith@partner123.com

Phone: 408-555-1212

Cisco.com User ID: tomsmith

Administrator Access Privileges: Partner Access online (PAL)

Cisco Testing ID: CSCO1234567

2

Message

Are you sure you want to delete all the selected contacts? Choose "Yes" to delete this contact. Choose "No" to cancel this action.

Yes   No

1   🗑 Delete Contacts   ➕ Add Contact Type   🌐 Move Contacts to Anoth…

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

Click on task: 👥 Contact Management

1. Click the "Delete Contacts" icon

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

Delete Contacts

Smith, Steve

Email: steve_smith@partner123.com

Phone: 408-555-1212

Cisco.com User ID: tomsmith

Administrator Access Privileges: Partner Access online (PAL)

Cisco Testing ID: CSCO1234567

2

Message

Are you sure you want to delete all the selected contacts? Choose "Yes" to delete this contact. Choose "No" to cancel this action.

Yes   No

1   🗑 Delete Contacts   ➕ Add Contact Type   🌐 Move Contacts to Anoth…

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

Click on task: Contact Management

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

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

Additional Information

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

View Career Certifications

Smith, Steve

Email: steve_smith@partner123.com

Phone: 408-555-1212

Cisco.com User ID: tomsmith

Administrator Access Privileges: Partner Access online (PAL)

Cisco Testing ID: CSCO1234567

Qualifications

Career Certification	Original Cert Date	Recert Date	Expiration Date
CQS-ASAAMR	25MAR2015	25MAR2015	25MAR2020
CSE-6.0			
S80-403			

🗑 Delete Contacts   ⭐ Qualifications (3)   ➕ Add Contact Type   🌐 Move Contacts to Anoth...

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

Click on task: [Contact Management]

1. Click the "Add Contact Type" icon

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

Add Contact Type

Add Role Type   ②

Role Type

Select One ▼

Submit

Smith, Steve

Email: steve_smith@partner123.com

Phone: 408-555-1212

Cisco.com User ID: tomsmith

Administrator Access Privileges: Partner Access online (PAL)

Cisco Testing ID: CSCO1234567

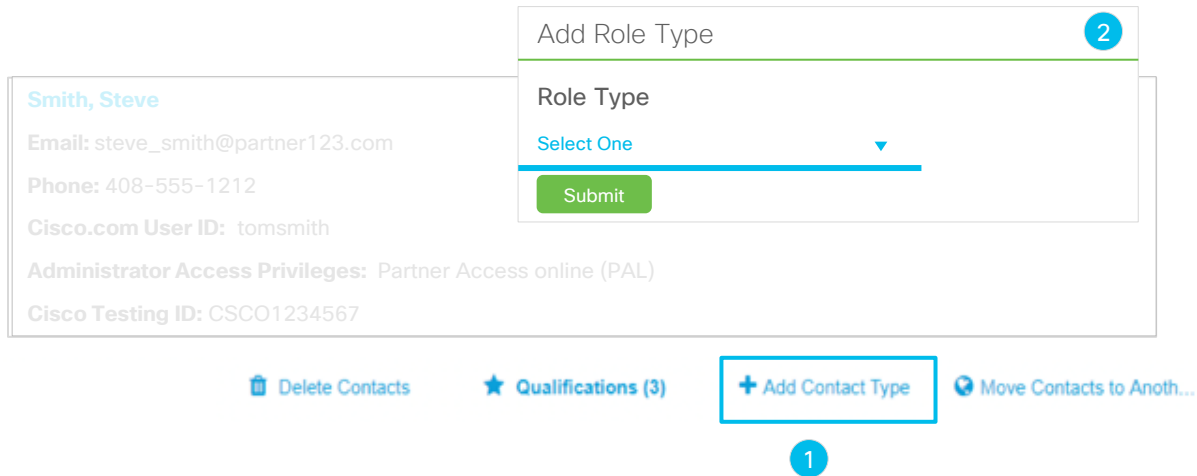🗑 Delete Contacts   ⭐ Qualifications (3)   ➕ Add Contact Type   🌐 Move Contacts to Anoth...

①

Move Contacts to Another Location

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

Click on task: **Contact Management**

1. Click the "Move Contacts to Another Location" icon under the contact you would like to move

2. A pop-up window will appear with all registered locations for the chosen company. When you have decided which location to assign the contact to, click the "Submit" button

3. You will receive a message indicating that the move was completed successfully

List of Locations

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

Name

Partner123
9000 Catalyst Way, Milpitas, CA 95134 United States — Submit

Partner123
123 Cisco Way, San Jose, CA 95131 United States — Submit

🗑 Delete Contacts ⭐ Qualifications (3) ➕ Add Contact Type 🌐 Move Contacts to Anoth...

List of Locations

Contact Moved Successfully
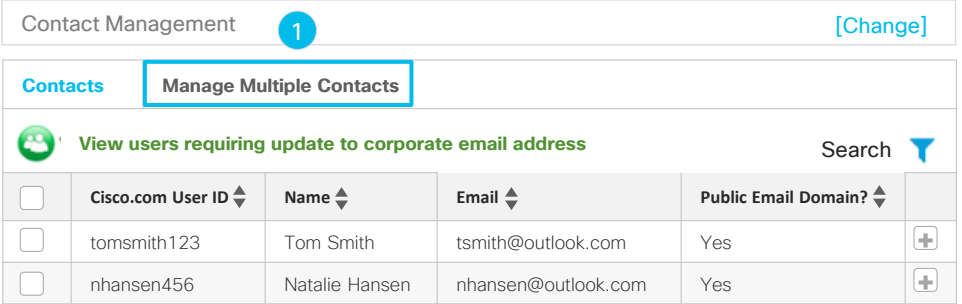
Destination Location
Partner123
9000 Catalyst Way
Milpitas, CA 95134
United States

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

Click on task: 👥 Contact Management

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

2. Select the Cisco.com User IDs you would like to manage, then you can select from the following three buttons to complete your request.

3. Click the appropriate button to complete the request:

   • Remove Selected Contacts *(Proceed to Steps 4 – 6 for additional steps)*

   • Move Selected Contacts *(Proceed to Step 9 –12 for additional steps)*

   • Bulk Contact Removal (Used only with 50+ contacts)

Remove and Move Contacts to Another Location for Multiple Contacts

Contact Management ①				[Change]

Contacts | **Manage Multiple Contacts**

🟢 **View users requiring update to corporate email address**   Search 🔻

☐	Cisco.com User ID ⇳	Name ⇳	Email ⇳	Public Email Domain? ⇳	
② ☐	tomsmith123	Tom Smith	tsmith@outlook.com	Yes	➕
☐	nhansen456	Natalie Hansen	nhansen@outlook.com	Yes	➕

⚠️ Bulk Contact Removal must be used to process more than 50 contacts at one time.

Remove Selected Contacts   Move Selected Contacts   Bulk Contact Removal

③

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

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

5. Click the "Submit" button to confirm your selection

6. You will receive a confirmation that your selected contact has been removed. Click the "Close" button to confirm your selection.

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

Contact Management   [Change]

Contacts   Manage Mul

View users requiri

④

Confirm Remove Contacts

You have selected to remove the following contacts. Are you sure? This action cannot be undone.

	Cisco.com User ID	Name	Email	Public Email Domain?
☑	tomsmith123	Tom Smith	tsmith@outlook.com	No

Cisco.com Use **⑤** Submit   Cancel   Public Email Domain?

SheetalSonawane
8640

You have removed the following contacts from your partner record

These are the contacts that have successfully been removed from your partner record.

Cisco.com User ID	Name	Email	Public Email Domain?
tomsmith123	Tom Smith	tsmith@outlook.com	No

AshwiniParab752

⚠ Bulk Contact Rem   **⑥** Close   ocess more than 50 contacts at one time.

Remove Selected Contacts   Move Selected Contacts   Bulk Contact Removal

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

<u>Only</u> the **PSS Administrator** can complete this task:

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

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

7

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

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

Remove Selected Contacts	Move Selected Contacts	Bulk Contact Removal

8

Move Selected Contacts – Select Location

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

Site Name ⬍	Action ⬍
Partner123_SanJose	Select
Partner123_Milpitas	Select

Cancel

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

9. You will be presented with a pop-up confirmation screen

10. Click the "Confirm" button to submit your request

11. A pop-up screen will appear confirming your request. Click the "Close" button

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

9 | Move Selected Contacts – Confirmation

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

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

10 [Confirm] [Select Another Location] [Cancel]

11 | Move Selected Contacts – Confirmed

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

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

[Close]

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

Click the task: 👥 Contact Management

1. Click "Manage Multiple Contacts" tab. Here you can do bulk contact removals.

2. Select the "Cisco.com User IDs" you would like to manage

3. Click the "Bulk Contact Removal" button

4. A pop-up menu will appear that provides you with three options:

   • Download company contacts. This will download an Excel (.xls, .xlsx, .csv) with all of your contact details

   • Download Bulk Contact Removal template. This Excel (.xls, .xlsx, .csv) template can be used to upload the contacts which he wants to upload

   • Upload Bulk Contact Removal template to disassociate users (.xls, .xlsx, .csv)

5. Make your selection, click the "Next" button

Bulk Contact Removal

Contact Management ① [Change]

Contacts | **Manage Multiple Contacts**

😀 **View users requiring update to corporate email address**   Search 🔻

	Cisco.com User ID ⇅	Name ⇅	Email ⇅	Public Email Domain? ⇅	
☐	tomsmith123	Tom Smith	tsmith@outlook.com	Yes	➕
☐	nhansen456	Natalie Hansen	nhansen@outlook.com	Yes	➕

⚠️ Bulk Contact Removal must be used to process more than 50 contacts at one time.

[Remove Selected Contacts]   [Move Selected Contacts] ③ [**Bulk Contact Removal**]

④ Bulk Management – Option Selection

Choose an option to proceed:

● **Download Company Contacts**

○ **Download Bulk Contact Removal Template**

○ **Upload Bulk Contact Removal Template to Disassociate Users**

⑤ [Next]   [Cancel]

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

6. Depending on your selection, you will be presented with these pop-up screens:

   • Download company contacts. This will download an Excel (.xls, .xlsx, .csv) with all of your contact details

   • Download Bulk Contact Removal template. This Excel (.xls, .xlsx, .csv) template can be used to upload the contacts which he wants to upload. Once you populate this document, then you can upload it, see steps on the next page.

Bulk Contact Removal - Continued
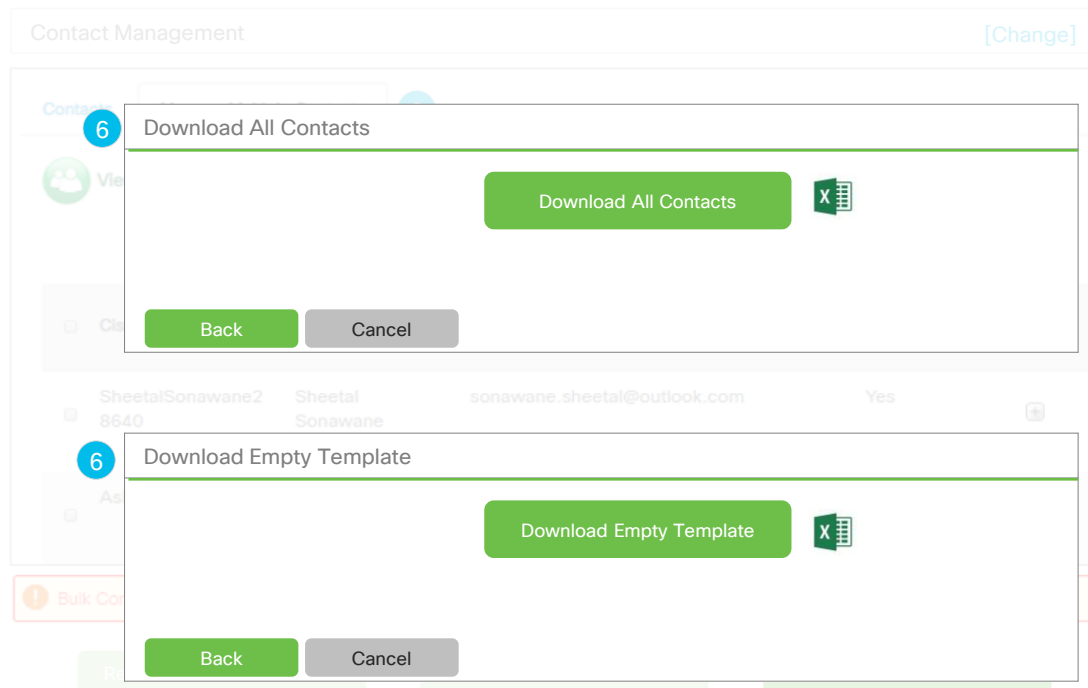
Only the **PSS Administrator** can complete this task:

7. Using the Bulk Contact Management template you just downloaded, enter all of 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

Bulk Contact Management – Option Selection

⚠ Each file size should not be greater than 5MB
Only document types of ".xls," ".xlsx," ".csv" format will be accepted
The file name should not have special characters such as ?, !, *, <>, /\, |

Contact File to Upload | Chose File | No File Chosen

Back | Cancel

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

10. Once the system has received the file, you will be prompted to confirm by selecting the "Yes" button

11. If you would like to delete more than 75% of your contacts, once uploaded, you will be prompted with a screen asking if you would like to proceed.

12. By clicking the "Yes" button, you will receive a confirmation screen

Bulk Contact Removal – Continued

Contact Management   [Change]

Contacts

(10) Are you sure you want to proceed?

The action to remove the selected contacts will not be reversed. Do you want to continue?

Yes   No

Cisco.com User ID   Name   Email   Public Email Domain?

(11) Are you sure you want to proceed?

Your request will result in the removal of more than 75% users associated to your company. Do you wish to proceed?

Yes   No

(12) Bulk Contact Management

Congratulations!

Your request to remove 1 contact(s) has been submitted
Your request has been captured in the Manage Multiple Contacts Log report and you will receive an email upon completion of the request.

Manage Access Requests

Click to Navigate to Work Instructions

Association Requests | Access Management | Global Administrator Access | Accountable Program Contacts

Association Requests

Why this is Important:

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

Click to navigate to:

Employee Initiated

PSS Administrator Initiated Requests to Change Location or Cancel

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

Click on task: ![Association Requests]

1. Click on "Employee Initiated Requests" tab to display requests

2. Select the contact whose Association Request you would like to approve or deny

3. Review and click "Approve" or Deny" button to process your request, proceed to step 4

Why do I need to do this?

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

Employee Initiated

Association Requests

① **Employee Initiated Requests** | PSS Administrator Initiated Requests

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

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

	Name ⇅	Partner Name ⇅	Email ⇅	Cisco.com User ID ⇅	Location Address ⇅	Status ⇅	Days Pending ⇅
☑	② 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

Search 🔽

③ Approve   Deny

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

4. Review contact details

5. If you wish to remove any requests, unselect the appropriate checkboxes

6. Click the "Submit" button to process your request, or click the "Cancel" button to return to the previous screen. The next page will display all the requests you have selected for final review.

Employee Initiated (Approval)

Association Requests

Employee Initiated Requests   PSS Administrator Initiated Requests

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

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

Request Approved

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

Search 🔽

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

Submit   Cancel

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

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

Employee Initiated (Approval) - Continued

Association Requests

Employee Initiated Requests   PSS Administrator Initiated Requests

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

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

⑦ **Request Approved**

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

Search 🔻

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

View All Employee Initia...

Employee Initiated (Denial)

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

8. If you selected the "Deny" button in step 3, a pop-up screen will appear confirming the association requests that have been denied

9. Select a reason from the drop-down menu provided for each denied request

10. Click the "Submit" button to process your request, or click the "Cancel" button to return to the previous screen.

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

Search 🔽

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

10 Submit   Cancel

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

Click on task: **Association Requests**

1. Click on "PSS Administrator Initiated Requests" tab to display all Initiated requests

2. Select the contact who you would like to "Change Location" or "Cancel Request" for

3. Click the "Change Location" button to process your request

4. A pop-up window will appear, select the preferred location

5. Click the "Submit" button to change the contact's site location, or the "Cancel" button to cancel your request. Proceed to step 6.

PSS Administrator Initiated Requests to Change Location or Cancel

Association Requests ①

Employee Initiated Requests | PSS Administrator Initiated Requests

Search 🔻

	Name ⬍	Registration Date ⬍	Country ⬍	Status ⬍
☑	Smith, John	Sep-09-19	United States	Pending
☐	Ng, Charles	May-10-20	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**

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

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

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

Important

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

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

PSS Administrator Initiated Requests to Change Location or Cancel - Continued

Association Requests

Employee Initiated Requests | PSS Administrator Initiated Requests

Change Location 6

Contact Moved Successfully

PSS Administrator Initi...

Cancel Request 7

Yes | No

Access Management

Why this is Important:

This section will cover the steps to request, manage and remove access to specific Cisco tools such as Partner Program Enrollment (PPE) and Total Partner View (TPV) along with other functions.

Click to navigate to:

[View and Edit Company Access](#)

[Request Additional Access](#)

[View / Remove My Access](#)

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

Click on task: 🔷 Access Management

1. Click on "Company Access" to search for tool users in your company, to search for an individual, and view all contact access

2. Click on "+" icon to expand section and search. In this example, the user will be searching for tool users in their company.

   - Click here to see example of searching for access for specific individual

   - Click here to see example of searching for access for all contacts for the company

3. Click the "All Types of Partner Administrators" pull down menu

4. Click the "Submit" button to search for the contacts who have been assigned access to this tool. In this example, it is the PM&A Administrator tool. See next page on additional steps for how PSS administrator can edit access

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

①

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

Company Access

② ➕ Search for Tool Users in Company

③

Access Privilege	Program Management & Application (PM&A) Administrator
Please select a Country/Country Group	CANSAC

④ Submit

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

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

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

7. Click the "Next" button, proceed to step 8

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

➕ Search for an Individual

➕ View all Contact Access

Contacts		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]

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

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

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

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

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

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

Country/Country Group: CANSAC

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

9 Submit   Cancel

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

Click on task: **Access Management**

1. Click on "Company Access" to search for tool users in your company, to search for an individual, and view all contact access

2. Click on "+" icon to expand section and search. In this example, the user will be searching for specific individual in their company..

3. Click the "Search for an Individual" pull down menu. User can search by a variety of criteria such as: Cisco.com User ID; Email Address; First Name; or Last Name

4. After you have entered search criteria, click the "Submit" button. See next page on additional steps for how PSS Administrator can edit access

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

1

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

Company Access

2 ▬ Search for an Individual

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

Cisco.com ID _____
                              OR
Email Address _____
                              OR
First Name (optional) _____

Last Name _____

4 Submit

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

5. Click "Add/Remove Access" button

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

7. Click the "Next" button to receive confirmation of removal, then proceed to step 8.

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

➕ Search for an Individual

➕ View all Contact Access

Contacts		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]

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

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

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

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

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

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

Country/Country Group: CANSAC

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

9 [Submit] [Cancel]

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

Click on task: **Access Management**

1. Click on "Company Access" to view all contacts who are associated with the PSS Administrator in specific locations

2. Click on "+" icon to expand section and search. In this example, the user will be searching for all contact access in their company.

3. Click the "View All Contact Access" link. Here a list of all contacts for this location along with their access levels will be displayed at the bottom of the page

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

4. Click the "Add/Remove Access" button

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

6. Click the "Next" button to receive confirmation of removal, proceed to step 7

View and Edit Company Access (View All Contact Access)

①

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

Company Access

② **③**
– View All Contact Access

| You are currently viewing contacts located in | **CANSAC** ▼ |

Contacts ⇅	**④**
Johnson, Tom (CANSAC)	Add / Remove Access

Tool	Access Level	Country/Country Groups
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

– Total Partner View — Access Level: Administrator

> When providing access to TPV, you also need to go to the "Accountable Contacts" section for specifying which dashboards and content should be accessible.

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

⑤ ☑ CANSAC

⑥ Next | Reset

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

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

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

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

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

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

Click on task: **Access Management**

1. Click on "Request Additional Access"

2. Select the Tool you need access to from the drop down menu, and the Country/Country Group

3. Review and click "Submit" button

4. Filter results. To request access, please contact via email any of the individuals listed

Why do I need to do this?

- To obtain additional tool/application access, you must contact the tool/application administrator directly to request access

- If your tool is not listed in the drop down menu, please contact your PSS Administrator

Request Additional Access

1

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

Request Access

> To request access to additional partner tools, you will need to contact your company's partner administrator. Select the tool you need access to from the pull-down menu and your company's list of partner administrators will be displayed.
>
> **2** **Select the tool you need access to**:   Select One
>
> **Please select a Country/Country Group:**   United States

3 Submit

4

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

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

4

Only the **Partner User** and the **PSS Administrator** can complete this task:
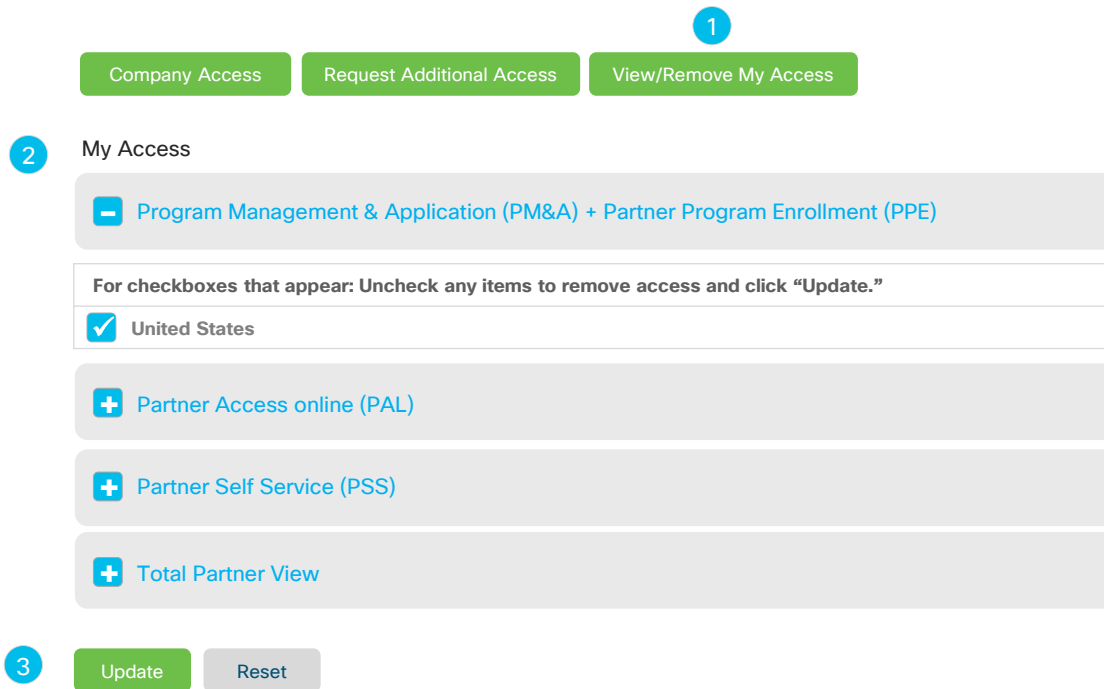
Click on task: **Access Management**

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

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

3. Review and click "Update" button

Why do I need to do this?

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

View / Remove My Access

①

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

② **My Access**

➖ **Program Management & Application (PM&A) + Partner Program Enrollment (PPE)**

| For checkboxes that appear: Uncheck any items to remove access and click "Update." |

☑ United States

➕ **Partner Access online (PAL)**

➕ **Partner Self Service (PSS)**

➕ **Total Partner View**

③ Update   Reset

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with a Company

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Global Administrator Access

Why this is Important:

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

Click to navigate to:

Work Instructions

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

Click on task: | Manage Global Administrator Access |

1. Click on "Remove Access" button to remove your global access to a specific country group

2. To manage the Global Access of your company employees, click on the "Company Global Access" button to view employees and their access levels, then proceed to step 3

Important

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

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

Manage Global Administrator Access

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

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

3. Choose any of the search options presented, then enter your criteria

4. Click the "Search" button to display your contacts and their access levels

5. Your search results will be displayed

6. Click the "Edit" button next to each contact to update their global access

Manage Global Administrator Access - Continued

Manage Global Administrator Access

You can grant Group Administrator Access to individuals within your company. Begin by entering an individual's contact information and identifying the search criteria from the drop down menu. You can also search for the individual by selecting the appropriate country location. To view a list of contacts within your company, select the "View All Contact Access" tab.

| Search for an Individual | View all Contact Access |

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.

Contact Information   Select One

Or

Country   Select One

3

4 Search

5 Contacts

6

👤 Steve Smith

Edit

Access Level: Partner Admin Level Access; Group Admin Level Access

Accountable Program Contacts

Why this is Important:

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

Click to navigate to:

Role Definitions

View and Delete Contact

Add a New Contact

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 the security PIN to process rebates for the Programs where you are enrolled and have earned a rebate

- The PSS Administrator and the Payment Administrator must assign at least one up per each applicable program of which you are enrolled

- **Important:** This is the only role that can claim the rebate. If no Rebate Coordinator is assigned the claim notifications are not sent and payment will be put on hold.

Payment Administrator

- Manages the assignment of the rebate coordinator (previously only managed by the PSS Administrator).

- The PSS Administrator and the payment administrator may assign up to two rebate coordinators, and is highly recommended

- **Important:** This role does not receive the rebate claim notification with the security PIN for rebate collection. They only assign the role of the rebate coordinator and copy contacts.

Copy Contacts

- Receives Global EasyPay claim notifications (without security PIN) regarding the payment period/process

- The PSS Administrator may assign up to three copy contacts. Assignment of more than one is highly recommended

- **Important:** This role does not receive the rebate claim notification with the security PIN They are only notified if a Rebate Coordinator is assigned.

Total Partner View

- Manage access to specific TPV dashboards

- The PSS Administrator can restrict access. (i.e. granting metrics data without financial program information)

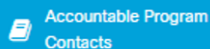- For general tool access, refer to the "Access Management" section

Manage

To begin managing your information: www.cisco.com/go/PSS

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

Click on task: 📝 Accountable Program Contacts

1. Here you can view a list of all assigned contacts, and to add a new one if needed Click on "Accountable Program Contact" to view a list of assigned contacts

2. Click on the "Delete" button to delete program contact assignment

3. You will receive a confirmation message prompting you to choose your preferred action

Why this is Critical

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

View and Delete Contact

Accountable Program Contacts

③

1 ➖ Accountable Program Contacts

Confirmation

Are you sure you want to delete Program Contact?

Choose "Yes" to delete OR Choose "No" to cancel this action.

| Yes | No |

The following contacts have been assigned for your company. To chan

Search ⎯⎯⎯⎯ 🔽

Name ⬍	Function ⬍	Role ⬍	Email ⬍	Action ⬍
Smith, Tom	Program - Cisco Services Partner Program	Copy Contact	Tom_Smith@partner123.com	**2** Delete
Hansen, Natalie	Program - Value Incentive Program	Rebate Coordinator	Natalie_Hansen@partner123.com	Delete

➕ Add Accountable Contact

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

Click on task:

| 📑 Accountable Program Contacts |

1. Here you can view a list of all assigned contacts, and to add a new one if needed Click on "Add Accountable Program Contact" then click on "Search Contacts" button

2. In the pop-up screen, enter the Name, Cisco.com User ID, or the email of the person you wish to locate

3. Click the "Search" button, then proceed to step 4

Important

In order to assign specific roles such as: Copy contact, payment administrator, rebate coordinator, and TPV dashboard access, this step must be completed.

If you search for an employee who you would like to assign to one or more of the roles above, ensure they have been added.

Add a New Contact

Accountable Program Contacts

① ➖ Add Accountable Program Contact

Search Contacts

② Search Contacts by Name or Cisco.com Id or E-mail.

Only contacts with valid Cisco.com ID can be searched and assigned a Program Role.

Last Name
Last Name

First Name
First Name

Cisco.com Id
Cisco.com Id

E-mail
E-mail

③ Search

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

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

5. Click the "Select" button, then proceed to step 6

Important

Once you select your preferred contact, the next sections will cover the steps to assign:
- Copy Contacts
- Rebate Coordinator
- Payment Administrator
- Total Partner View Program Dashboard Access

Add a New Contact - Continued

Accountable Program Contacts

➖ Add Accountable Program Contact

4 | Search Results

CCO ID ⬍	Contact Name ⬍	Company Name ⬍	Email ⬍
⚪ Partner123	Tom Smith	Partner123	tsmith@partner123.com

5 [Select]

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

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

7. Click the "Add" button to save, then process to step 8

Important

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

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

Add a New Contact – Continued (Rebate Coordinator Example)

Accountable Program Contacts

Add Accountable Program Contact

Search Contacts   Hansen, Natalie

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

Role   6   **Select One**

Copy Contact 1
Copy Contact 2
Copy Contact 3
Payment Administrator
Program Coordinator
Rebates Coordinator 1
Rebates Coordinator 2
Total Partner View

7   Add

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

8. You will be prompted to select specific programs to assign this role to. Programs designated with a green check mark ✓ are the programs where that designee has already been assigned. Their name will also appear as well. You can un-check to remove their access.

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

Important

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

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

Add a New Contact – Continued (Rebate Coordinator Example)

Accountable Program Contacts

Add Accountable Program Contact

⑧

Search Contacts Hansen, Natalie

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

Role Rebates Coordinator 1

Function Program

☑ Value Incentive Program (Natalie Hansen)

☐ Cisco Services Partner Program

☑ Cisco Rewards (Natalie Hansen)

☐ Perform Plus

☐ Lifecycles Incentives

⑨ Add

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

Actual access to TPV tool is read only for all users and is controlled in the "Access Management" section. If no selections are made full access is provided

1. When managing access to TPV, go to "accountable contacts and select the "Function" of "Dashboard". Here you can restrict user access to TPV by selecting specific dashboards to assign this role to.

2. To provide access to specific dashboards and program pages, select the appropriate check boxes.

   Selections designated with a green check mark ✓ are those that the user has already been assigned access

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

To remove access, you must delete the accountable contact for the assigned TPV contact, see "View and Delete Contact"

Add a New Contact – Continued (Total Partner View Example)

Accountable Program Contacts

Add Accountable Program Contact

Search Contacts   Hansen, Natalie

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

Role   Total Partner View

① **Function**   ② Dashboard

☐ Select All

☑ Incentive Programs – Payments

☐ Incentive Programs - VIP

☐ Incentive Programs - CSPP

☐ New Sales Prospects

③ **Add**

Manage Other Information

Click to Navigate to Work Instructions

View and Download Reports

Manage My Reward Programs

Distributor Details

Cisco Sales Contacts

View and Download Reports

Why this is Important:

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

Click to navigate to:

Work Instructions

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

Click on task: 📄 Reports

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

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

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

   • **Number of Contacts:** How many contacts have been removed

   • **Success Records:** How many contacts have been successfully removed

   • **Error Records:** How many contacts have not been removed due to an error

Proceed to step 4

View and Download Reports

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 (2)

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 Cor

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	2020-05-01 22:34:23	tsmith@partner123.com
Bulk Contact Removal	1	1	0	2020-04-29 21:34:23	tsmith@partner123.com

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

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

5. Click "Ok" to open the file

View and Download Reports – Continued

Reports   Partner123   [Change]

④ Opening Bulk Contact Removal Error Report.csv   ✕

You have chosen to open:

   📊 **Bulk Contact Removal Error Report.csv**

     which is: Microsoft Excel Comma Separated Values File (140 bytes)

     from: blob:

What should Firefox do with this file?

④   ⦿ Open with   Microsoft Excel (default)   ⌄

     ○ Save File

     ☐ Do this automatically for files like this from now on.

⑤

             OK   Cancel

Distributor Details

Why this is Important:

Here you can verify your account numbers with your Distributors.

By associating yourself with a Distributor, you can receive assistance with program onboarding and training if you do not have coverage from Cisco directly.

Click to navigate to:

Work Instructions

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

Click on task: 🔧 Distributor Details

1. Here you can view a list of Distributor and Reseller details entered for a 2-tier Partner. Click on "pull down" to view and select more Distributors

2. Enter "Reseller Account Number/Unique ID"

3. Click on "+ Icon" to add more Reseller Account Number/Unique ID

4. Click the "Save" button to save this record. A success message will pop up, "Your entered information updated successfully".

Important

PSS Administrators can view the Distributor and Reseller Details entered for a 2-Tier Partner in this task.

Distributor Details

Distributor Details

⚠ Verify your account number(s) with your Distributor(s). To complete the form below, you must provide the exact Account Number/ID that your company has with your Distributor(s).

Please select Preferred Distributor for onboarding and training purposes.

Ingram Micro ▾ ①

Reseller Account Number/Unique ID*

21812134543 ➕ ②

Show More Distributors

Select All	Additional Distributors*	Reseller Account Number/Unique ID	
☑	AVT Technology Solutions	12345	➕ ③
☐	COMSTOR	Reseller Number	➕

④ **Save**
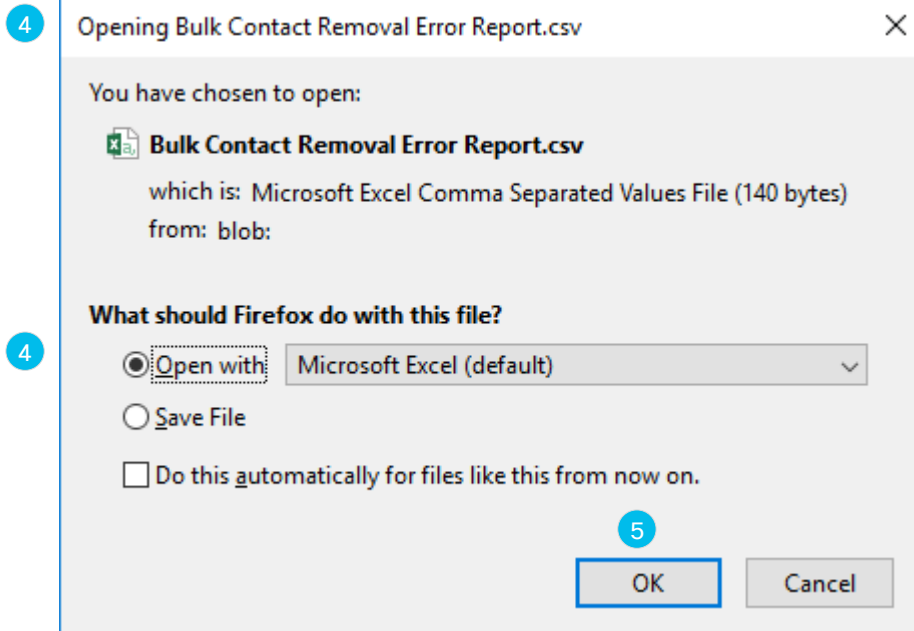
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Cisco Sales Contacts

Why this is Important:

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

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Click to navigate to:

Work Instructions

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

Click on task: **Cisco Sales Contacts**

1. Enter the name of your company in the "Customer / Partner Name" and the Country of location in the "Country" field (red *asterisk fields are mandatory)

2. Click the "Submit" button

3. The Cisco Channel Account Managers associated with your company will be displayed

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Important

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

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

Cisco Sales Contacts – Channel Account Team

Cisco Sales Contacts

①

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

② **Submit**   **Clear**

③

Channel Account Team	Who is My Cisco Rep?

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

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

Click on task: **Cisco Sales Contacts**

1. Click on "Who is My Cisco Rep?" tab

2. The Cisco Representatives associated with your company will be displayed

Cisco Sales Contacts – Cisco Representative

Channel Account Team | **Who is My Cisco Rep?** ①

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

②

Support & Resources

Why this is Important:

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

Click to navigate to:

Useful Links

All users can complete this task:

The process steps to open a Cisco Support case for an issue being experienced are displayed.

Review the list of scenarios and follow the steps from there.

Support & Resources

Issues	How to resolve
Tool-related support: Upon submission of your case, you will receive a response from Cisco within 2 business days with a status. To submit and check the status of your case, refer to the Customer Service Hub: https://customerservice.cloudapps.cisco.com/	
Access to tools (assign partner admin role)	Open a Partner Tools support case if a review of this guide does not answer your question.
Tool support (partner registration, associate contacts, assign rebate coordinator, and so on)	
Program Set-Up	
Enrollment: Not able to complete Channel Program Incentive Agreement (CPIA) enrollment.	For more information, refer to the following: • CPIA User Guide • Partner Self Service tool
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 because of incorrect or missing contact information	Contact one of the PSS Administrators for your company to ensure that a Rebate Coordinator has been assigned for the programs of your choice
Rebate coordinator not assigned	
Incorrect beneficiary name or country on claim notification	Open a Program Payment support case.
Questions regarding payment amounts	

Manage My Reward Programs

Why this is Important:

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

Click to navigate to:

N/A