



# Partner Self Service

User Guide

May 12, 2025

## About this Guide

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

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

By clicking the “[Table of Contents](#)” button, you will have access to a list of the sub-sections of the buttons above.

## Access to PSS Application

To access the application, you must complete two steps:

### 1. Obtain a Cisco.com User profile and password

- Refer to: <https://id.cisco.com/signin/register> to create your profile.
- Once completed, you will receive an email confirming your Cisco.com User profile creation.

### 2. Obtain partner level access

- This can be completed by associating your profile with your partner company.
- Refer to the “[Associate Myself with a Company](#)” section for the steps to complete this task.

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

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# User Definitions

## Why this is important:

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

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

## Click this task to navigate to:

[User definitions](#)

## About Users – What Are the Tasks They Can Do?

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

### Guest User

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

- Associate Myself with a Company

### Partner User

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

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

### Partner Self Service (PSS) Administrator

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

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

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

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# Associate Myself with a Company

## Why this is important:

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

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

## Click this task to navigate to:

[Work Instructions](#)

Only Guest User can complete this task:

Click on task:



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

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

### Why do I need to do this?

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

## Associate Myself with a Company

The screenshot shows the 'Associate Myself with a Company' form. It includes a search bar, a dropdown for 'Country' (set to 'UNITED STATES'), a text field for 'Company Name' (containing 'test'), and a 'Search Criteria' dropdown (set to 'Begins with'). A 'Next' button is at the bottom. A 'Search Results' modal is open, showing a table with columns 'Site name' and 'Site Address'. The table contains one entry: 'Cisco Partner 123' with address '300 E TASMAN DR, SAN JOSE CA 95134 USA'. A 'Submit' button is at the bottom left, and a 'Back' button is at the bottom right.

1. Country: UNITED STATES

2. Company Name: test

Search Criteria: Begins with

Next

3. 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.

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

4. Submit

5. Back

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


- You will receive a prompt with a status of your company association request
- A list of Partner Administrators will be generated who can approve your request. You may send a reminder to the approver list by clicking the [“Send Reminder Email to Admin”](#) button

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

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

## Associate Myself with a Company - Continued

6



Your request is still being processed.

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

7

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

[Send Reminder Email to Admin](#)[Cancel Request](#)



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# Manage My Profile

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

Click on task:



My Profile

1. Edit “Basic Information” section
2. Review and click “[Submit](#)” button, and a pop-up menu confirming your update will appear

### Why do I need to do this?

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

## Edit Basic Profile Information

1

### 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 ▼	

2

SubmitBack

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

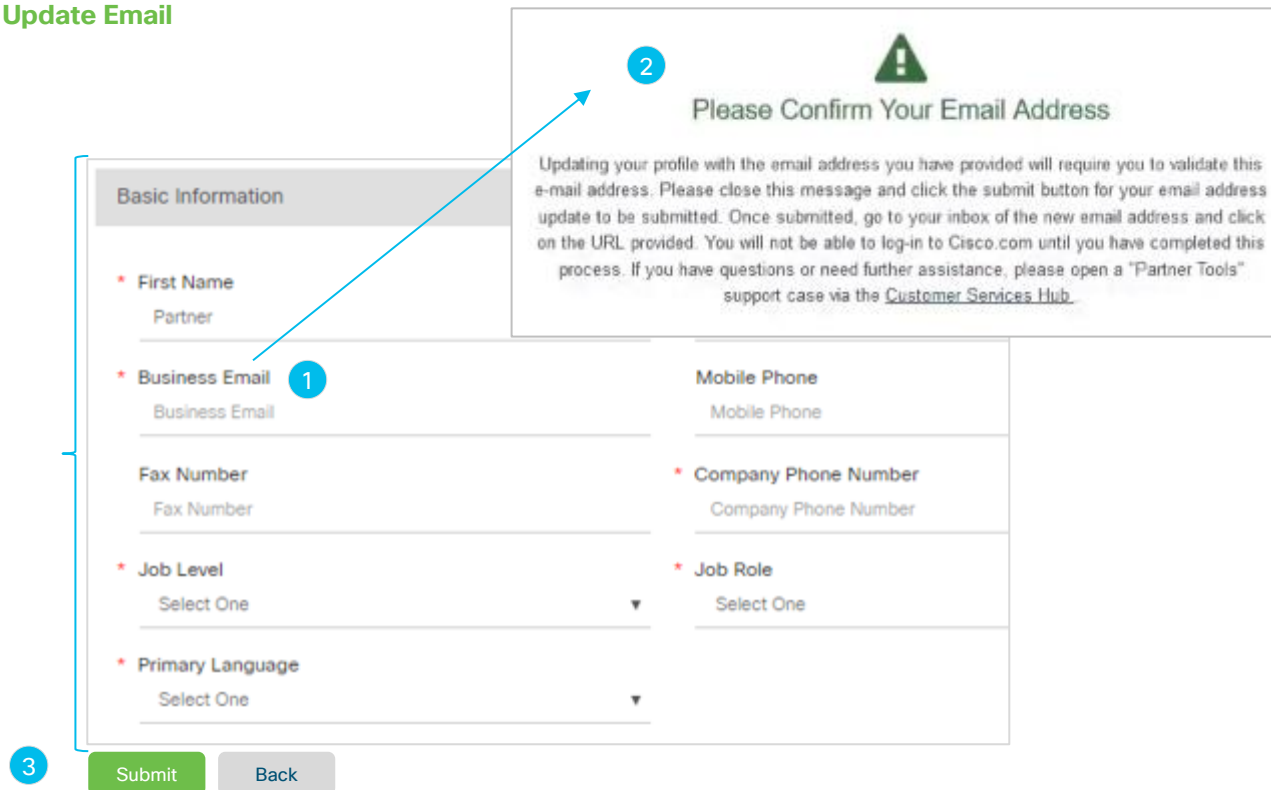
Click on task:  **My Profile**

1. Edit “[Business Email](#)” field
2. You will be prompted with a “[pop up window](#)” that includes instructions to go to your new email to click on the URL provided.

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

3. Close the “[pop-up window](#)”, then click the “[Submit](#)” button.

## Update Email



The screenshot illustrates the 'Update Email' process. It features a 'Basic Information' form with the following fields:

- \* First Name**: Partner
- \* Business Email**: Business Email (labeled with a blue circle 1)
- Fax Number**: Fax Number
- \* Job Level**: Select One
- \* Primary Language**: Select One
- Mobile Phone**: Mobile Phone
- \* Company Phone Number**: Company Phone Number
- \* Job Role**: Select One

A blue arrow points from the 'Business Email' field to a pop-up window titled 'Please Confirm Your Email Address' (labeled with a blue circle 2). The pop-up contains the following text:

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](#).

At the bottom of the form, there are two buttons: **Submit** (labeled with a blue circle 3) and **Back**.

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# Change Associated Location

## Why this is important:

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

## Click to navigate to:

[Work Instructions](#)

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

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

Click on task:



My Profile

1. Scroll to the “[Business Address](#)” section, then “[Change Location](#)” section in the pop up menu that has opened
2. Click on “[Change Location](#)” link, proceed to step 3

### Why do I need to do this?

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

## Change Associated Location

1

### Business Address

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

2

[Change Location](#)  
[Change or Remove My Company Association](#)  
[Delete Additional Cisco.com User IDs](#)

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

- Click on “**Change Location**” button in the pop-up menu
- Choose any of the radio buttons corresponding to the address of your new location
- 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 ⚡

4

- |                       |                                                                           |
|-----------------------|---------------------------------------------------------------------------|
| <input type="radio"/> | <b>Partner123</b> , 456 Cisco Way, San Jose, CA 95131, United States      |
| <input type="radio"/> | <b>Partner123</b> , 2727 Palm Tree Way, San Jose, CA 95128, United States |
| <input type="radio"/> | <b>Partner123</b> , 9000 Catalyst Way, Milpitas, CA 95132, United States  |

5

Submit

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# Change / Remove Company Association

## Why this is important:

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

## Click to navigate to:

[Work Instructions](#)



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

Click on task:



My Profile

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

### 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.

You will be able to update your email address when completing steps to associate to your new partner company.

## Change / Remove My Company Association

1

### Business Address

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

2

[Change Location](#)  
[Change or Remove My Company Association](#)  
[Delete Additional Cisco.com User IDs](#)

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

- Click on “[Change/Remove My Company Association](#)” button
- 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.

4

### Change/Remove Association

Are you sure you want to proceed?

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

Click on task:



My Profile

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

### Why do I need to do this?

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

## Delete Additional Cisco.com User IDs

1

### Business Address

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

2

[Change Location](#)  
[Change or Remove My Company Association](#)  
[Delete Additional Cisco.com User IDs](#)

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

- 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](#)



**Partner Users** must complete this task:

Select task:  **My Profile**

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

### Why do I need to do this?

This is a mandatory step to complete your profile.

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

## Receive Cisco Communications

1

### Cisco Communications

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

2

I would like to receive communications by email. Yes ☒ No ☐

3

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

☐ **Technology Interests**

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

☐ **Communications Interests**

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

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**Submit**

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# Find My PSS Admin

## Why this is important:

PSS administrators are responsible for managing access to partner tools for their associated company users.

## Click to navigate to:

[Work Instructions](#)

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

Select task:  Find My PSS Admin

1. View the list of PSS admin(s) and contact the PSS admin who holds admin rights to the Country/Country Groups where you need access. Request the application/tool access you require.

### Important

If you want access to an application/tool for a specific Country/Country Group, the PSS admin that can help you must hold admin rights to your associated Country/Country Group along with admin rights to the Country/Country Group where you need access.

## Find My PSS Admin

PSS administrators are responsible for managing access to partner tools for their associated company users.

From the list below, please contact the PSS admin who holds admin rights to the Country/Country Groups where you need access. From there, request the application access you require.





Administrator(s) ⚙	
<a href="#">Partner123 (Germany)</a>	 <a href="mailto:Partner123@ciscopartner.com">Partner123@ciscopartner.com</a> GERMANY
<a href="#">Partner456 (Germany)</a>	 <a href="mailto:Partner456@ciscopartner.com">Partner456@ciscopartner.com</a> GERMANY
<a href="#">Partner789 (Germany)</a>	 <a href="mailto:Partner789@ciscopartner.com">Partner789@ciscopartner.com</a> GERMANY
<a href="#">PartnerABC (Germany)</a>	 <a href="mailto:PartnerABC@ciscopartner.com">PartnerABC@ciscopartner.com</a> BELUX, CANADA, FRANCE, GERMANY, INDIA SUB-CONTINENT, IRELAND, MALAYSIA, MEXICO, NETHERLANDS, SPAIN, SWITZERLAND, UK, USA

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# Manage My Company

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# Company Details

## Why this is important:

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

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

## Click to navigate to:

[Work Instructions](#)

Only PSS Administrator can complete this task:

Click on task:  **Company Details**

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

Note: You can click **“Change”** to select any of your different registered company instance

## Company Details



### 1 Search Company

#### Select Company and Geography

2

Partner123 (United States)

Select

 Number of Contacts: 89  
 Number of Locations: 6

### 3

Company Details

Partner123 United States

[\[Change\]](#)

Business Information

**Company Name**  
Partner123

**Country Name**  
United States

**Headquarter Address**  
123 Cisco Way, San Jose, CA 95131  
United States

**Purchasing Relationship**  
Indirect

**\*Corporate Web Address**  
www.partner123.com

**Federal Tax ID**  
1234567

**VAT Number**  
1234567

**Email Domain Name**  
Partner123.com

**\*Company Description**  
Software technology company

### 4

Submit





Only PSS Administrator can complete this task:

5. As you scroll down through the “[Company Details](#)” section, you will be able to view your:

- Registration Status
- Application Details
- Agreement Dates and Timelines

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

## Company Details - Continued

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

Only PSS Administrator can complete this task:

6. As you scroll down through the “[Company Details](#)” section, you will be able to view your:

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






### Important

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

## Company Details - Continued

6

### Partner Certification/Specialization/Authorizations

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



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# 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 Locator Application](#)[Designate HQ Location](#)[Display Channel Account Team](#)

Only PSS Administrator can complete this task:

Click on task:  Location Management

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

## Search Locations

1


Location

Partner123

123 Argentina Circle  
Santo Domingo  
Dominican Republic  
**Phone Number:** 809-567-5140  
**Date Added:** May 10, 2023

☐ Show in Partner Locator

Channel Account Team

 Contacts ( 6 )

2

Search Locations

Add Another Location

3

Search

Country/Country Group

Select One

Site Name

Select One

Site Criteria

Select One

City

Postal Code

State/province


Search


Partner123


9000 Catalyst Way  
Milpitas, CA 95134  
United States  
**Phone Number:** 408-555-4567  
**Date Added:** May 10, 2023


☐ Show in Partner Locator

Channel Account Team

 Contacts ( 6 )

 Make HQ

 Edit Location

 Delete Location

Only PSS Administrator can complete this task:

Click on task:  Location Management


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

## Add Location

Location Management

Partner123

[\[Change\]](#)

To more easily find your location  [filter this list.](#)

Search Locations

Add Another Location

1

3

Add Another Location (Search)

To add another location for your company, be then choose “Search:”

\*Country [Select One](#)

\*Site Name

\*Address 1

City

State

Postal Code

2

Add Another Location

I hereby confirm that:

1.I am authorized to act on behalf of Partner to add a Site ID(s) to Partner's profile;

2. Partner is authorized to enter into the applicable channel partner agreement with Cisco on behalf of Partner's Affiliate(s); and

3. Partner's new location and Affiliate(s) added as a Site ID(s) meet all the requirements set forth in the applicable Cisco partner agreement (e.g. ownership requirements, within the authorized territory, etc.).

Agree

Quit

4

Search

Only PSS Administrator can complete this task:

- Confirm location details and update any additional fields presented. (red **\*asterisk fields are mandatory**)
- Click “Add” link
- You will receive a status message

## Add Location - Continued

5

### Add Another Location (Confirm)

*Country	United States
*Location Name	
*Address 1	
*City	
State	
Postal Code	
*Phone	
Fax	
Local Language	English
Office Type	Sales Support Office
Is this a support location?	Yes <input checked="" type="radio"/> No <input type="radio"/>
Is this the headquarter location?	Yes <input checked="" type="radio"/> No <input type="radio"/>

6

Add

Message

7

Please allow 24 hours to reflect in Partner Locator.

Only PSS Administrator can complete this task:

Click on task:  Location Management

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

## Edit Location

[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, 2023

☐ Show in Partner Locator[Channel Account Team](#) [Contacts \( 6 \)](#) [Make HQ](#) [Edit Location](#) [Delete Location](#)**2****Partner123**

9000 Catalyst Way  
Milpitas, CA 95134  
United States  
**Phone Number:** 408-555-4567  
**Date Added:** May 10, 2023

☐ Show in Partner Locator[Channel Account Team](#) [Contacts \( 6 \)](#) [Make HQ](#) [Edit Location](#) [Delete Location](#)

Only PSS Administrator can complete this task:

- You will be presented with a pop-up window with a list of fields to complete (**red \*asterisk fields are mandatory**)
- Click **“Update”** link. A confirmation message will be displayed.

### Edit Location - Continued

3

#### Update Site

**\*Country**

United States

**\*Location Name****\*Address 1****\*City**

State

Postal Code

**\*Phone**

Fax

Local Language

English

Office Type

Sales Support Office

Is this a support location?

Yes ☒ No ☐

Is this the headquarter location?

Yes ☒ No ☐

4


Update

Only PSS Administrator can complete this task:


Click on task:  Location Management

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

## Delete Location

To more easily find your location  [filter this list.](#) [Add Another Location](#)

1

Location 


Partner123


123 Cisco Way  
San Jose, CA 95131  
United States  
**Phone Number:** 408-555-1212  
**Date Added:** May 10, 2023

☐ Show in Partner Locator

Contacts ( 20 )

☐ Make HQ

 Edit Location

2  Delete Location

3

Partner123

9000 Catalyst Way  
Milpitas, CA 95134  
United States  
**Phone Number:** 408-555-4567  
**Date Added:** May 10, 2023

☐ Show in Partner Locator

Contacts ( 20 )

☐ Make HQ

Are you sure you want to proceed?

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 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, 2023

1

☒ Show in Partner Locator

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, 2023

2

☐ Show in Partner Locator

Channel Account Team

Contacts ( 6 )

Make HQ

Edit Location

Delete Location

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



Only PSS Administrator can complete this task:

Click on task: [Location Management](#)

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

## Designate HQ Location

[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, 2023

☐ Show in Partner Locator[Channel Account Team](#)[Contacts \( 6 \)](#)[Make HQ](#)[Edit Location](#)[Delete Location](#)

#### Partner123

9000 Catalyst Wa  
Milpitas, CA 95131  
United States  
**Phone Number:**  
**Date Added:** Ma

☐ Show in Partner Locator[Channel Account Team](#)[Contacts \( 6 \)](#)[Make HQ](#)[Edit Location](#)[Delete Location](#)

### Message

Please allow 24 hours to reflect in Partner Locator.

Only PSS Administrator can complete this task:

Click on task:  Location Management

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

## Display Channel Account Team

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, 2023

☐ Show in Partner Locator

1

Channel Account Team

Contact

Partner123

9000 Catalyst Way  
Milpitas, CA 95134  
United States  
**Phone Number:** 408-555-4567  
**Date Added:** May 10, 2023

☐ Show in Partner Locator

2

Channel Account Team

Tsmith (ICAM)  
Nhansen (Partner Development Manager)  
Vrosado (CAM)

Delete Location

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  
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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 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 **PSS Administrator** can complete this task:

- 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
- Once you have made your selection, click the **“Search”** button to view all contacts associated with your company. Proceed to Step 6.
- 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

### 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 PSS Administrator can complete this task:

- 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

Email: Tsmith@partner123.com

Phone: 408-555-1212

Cisco.com User ID: tomsmith123

 Move Contacts to Another Location

 Add Contact Type

 Delete Contacts

Only PSS Administrator can complete this task:

Click on task:  Contact Management

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

## Add Contacts

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 **PSS Administrator** can complete this task:

- 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 #.
- Click **“Search”** button. If the contact information is found, it will be displayed.
- Click **“Add Contact”** to add the displayed contact information.
- 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

\*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 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	<b>Basic Information</b>	<b>Business Address</b> 2	
	<b>*First Name</b> Tom	<b>*Last Name</b> Smith	<b>Partner Name</b> Partner123
	<b>*Business E-mail</b> Tom_smith@partner123.com	<b>Mobile Phone</b> 408-555-1212	<b>Business Address</b> 9000 Catalyst Way
	<b>Fax Number</b> null	<b>*Company Phone Number</b> 415-123-3456	<b>City</b> San Jose
	<b>*Job Level</b> Executive ▼	<b>*Job Role</b> Executive Management ▼	<b>State/Province</b> CA
	<b>*Primary Language</b> English ▼		<b>Country</b> United States
			<b>Postal Code</b> 95131

3

Submit

### Cisco Testing Information

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

Cisco Testing ID (CSCO#)

If you have more than one CSCO#, click [here](#).

Cisco Testing ID (CSCO#)

(For example: CSCO12345678)

4

Submit

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

Click on task:



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: CSC01234567

1

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

Delete Contacts

+ Add Contact Type

Move Contacts to Anoth...

Only PSS Administrator can complete this task:

Click on task:  Contact Management

1. Click the “Qualifications” icon. This icon will appear if a Cisco Testing ID has already been added to the contacts profile
2. A pop-up window will appear that provides details regarding Career Certifications, Certification Date, Recertified Date, and Expiration Date where applicable

### 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 [Cisco 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: CSC01234567

Qualifications

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

1

2

Delete Contacts

★ Qualifications (3)

+ Add Contact Type

Move Contacts to Anoth...

Only PSS Administrator can complete this task:

Click on task:



Contact Management

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

## Add Contact Type

**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: CSC01234567

Add Role Type

Role Type

Select One ▼

Submit

Delete Contacts

★ Qualifications (3)

+ Add Contact Type

🔄 Move Contacts to Anoth...

1

Only PSS Administrator can complete this task:

Click on task:



Contact Management

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

## Move Contacts to Another Location

List of Locations	
To change locations, select a new location from the following list.	
Name	
<b>Partner123</b> 9000 Catalyst Way, Milpitas, CA 95134 United States	<a href="#">2</a> Submit
<b>Partner123</b> 123 Cisco Way, San Jose, CA 95131 United States	Submit

1

Delete Contacts

Qualifications (3)

Add Contact Type

[Move Contacts to Anoth...](#)

3

List of Locations
<a href="#">Contact Moved Successfully</a>
<b>3</b> <b>Destination Location</b> Partner123 9000 Catalyst Way Milpitas, CA 95134 United States

Only PSS Administrator can complete this task:

Click on task:  **Contact Management**

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

## Remove and Move Contacts to Another Location for Multiple Contacts


Contact Management


1



[Change]

Contacts

Manage Multiple Contacts

 View users requiring update to corporate email address

Search 

<input type="checkbox"/>	Cisco.com User ID	Name	Email	Public Email Domain?	
<input type="checkbox"/>	tomsmith123	Tom Smith	tsmith@outlook.com	Yes	
<input type="checkbox"/>	nhansen456	Natalie Hansen	nhansen@outlook.com	Yes	

!

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

2

3

Remove Selected Contacts

Move Selected Contacts

Bulk Contact Removal

Only PSS Administrator can complete this task:

- If you selected the option to “[Remove Selected Contacts](#)”, a pop menu will appear asking you to confirm the removal of the contacts
- Click the “[Submit](#)” button to confirm your selection
- 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 [\[Change\]](#)

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?
<input checked="" type="checkbox"/>	tomsmith123	Tom Smith	tsmith@outlook.com	No

5

Submit Cancel

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

6

Close

Bulk Contact Removal: Process more than 50 contacts at one time.

Remove Selected Contacts Move Selected Contacts Bulk Contact Removal

Only PSS Administrator can complete this task:

- If you selected option to “[Move Selected Contacts](#)”, the system will ask you to choose your desired location if there are multiple locations.
- If there are multiple locations, the system will ask you to choose your desired location. Click the “[Select](#)” button to submit your choice, proceed to step 9

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

7

<input type="checkbox"/>	Cisco.com User ID ⚡	Name ⚡	Email ⚡	Public Email Domain? ⚡	
<input checked="" type="checkbox"/>	tomsmith123	Tom Smith	tsmith@partner987.com	No	
<input checked="" type="checkbox"/>	nhansen456	Natalie Hansen	nhans@partner456.com	No	
<input type="checkbox"/>	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	
Partner123_Milpitas	

Cancel



Only PSS Administrator can complete this task:

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

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

9

### Move Selected Contacts – Confirmation

You are about to move the following contacts to the Partner123\_SanJose location. Click “Confirm” to complete the operation or “Cancel”

<input type="checkbox"/>	Cisco.com User ID ⬆	Name ⬆	Email ⬆	Public Email Domain? ⬆
<input checked="" type="checkbox"/>	tomsmith123	Tom Smith	tsmith@partner987.com	No
<input checked="" type="checkbox"/>	nhansen456	Natalie Hansen	nhans@partner456.com	No

10

Confirm

Select Another Location

Cancel

11

### Move Selected Contacts – Confirmed

**Congratulations! You have successfully moved the following contacts to the “Partner123\_SanJose” location**

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

Close

Only PSS Administrator can complete this task:

Click the task:  **Contact Management**


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

## Bulk Contact Removal


Contact Management 1 [\[Change\]](#)







Contacts


Manage Multiple Contacts



View users requiring update to corporate email address

Search 

<input type="checkbox"/>	Cisco.com User ID 	Name 	Email 	Public Email Domain? 	
<input type="checkbox"/>	tomsmith123	Tom Smith	tsmith@outlook.com	Yes	
<input type="checkbox"/>	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

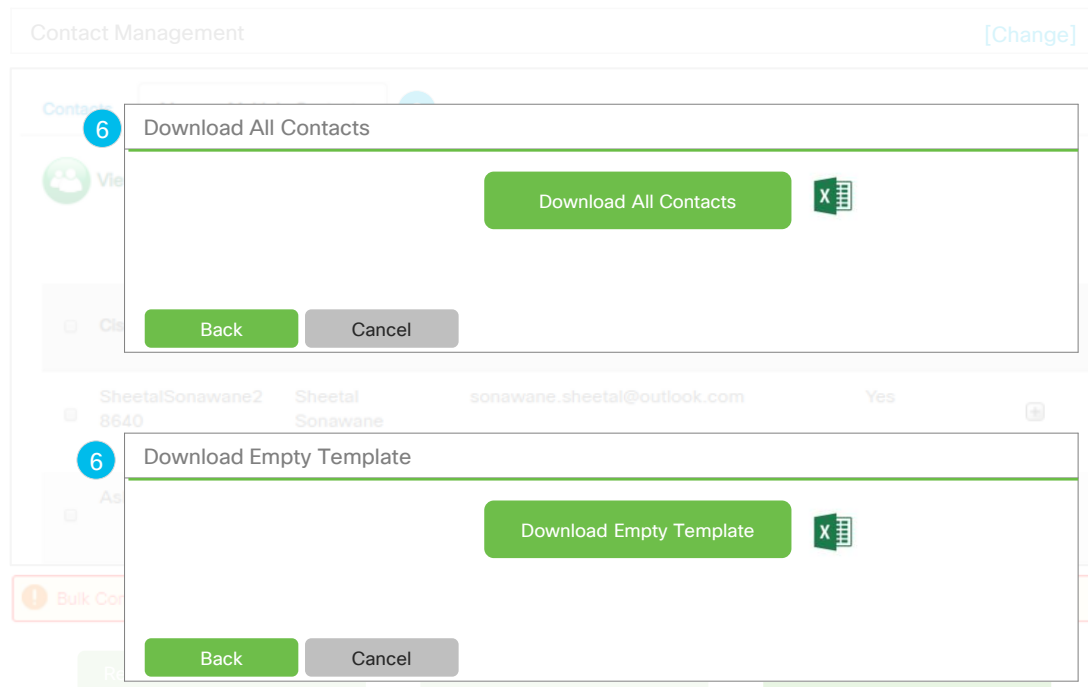
5 Next

Cancel

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

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

## Bulk Contact Removal - Continued



Only PSS Administrator can complete this task:

- Using the Bulk Contact Management template that you just downloaded, enter all the Cisco.com User IDs you would like to disassociate from your company (Your limit is up to 50 IDs), then save to your desktop
- From the “Bulk Contacts Management – Option Selection” select the “Upload Bulk Contact Removal” template to disassociate users.
- 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

The screenshot displays the 'Bulk Contact Management' interface. At the top, a Microsoft Excel spreadsheet template is shown with columns for 'Cisco.com User ID', 'Name', and 'Email'. A red circle with the number '7' highlights the 'Upload Bulk Contact Removal' option in the sidebar. Below the spreadsheet, a modal dialog titled 'Bulk Contact Management - Option Selection' is open. It contains a red warning icon and text: 'Each file size should not be greater than 5MB', 'Only document types of “.xls,” “.xlsx,” “.csv” format will be accepted', and 'The file name should not have special characters such as ?, !, \*, < >, / \, |'. At the bottom of the dialog, there is a 'Contact File to Upload' section with a 'Chose File' button (labeled with a red circle '9') and a 'No File Chosen' button. There are also 'Back' and 'Cancel' buttons at the very bottom of the dialog.

	A	B	C	D	E	F	G
1	Cisco.com User ID	Name	Email				
2							
3							
4							
5							
6							

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

- Once the system has received the file, you will be prompted to confirm by selecting the “Yes” button
- 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.
- By clicking the “Yes” button, you will receive a confirmation screen

## Bulk Contact Removal - Continued

The screenshot shows the 'Contact Management' interface with three numbered steps overlaid on a background of a contacts table. The table has columns for 'Cisco.com User ID', 'Name', 'Email', and 'Public Email Domain'. Step 10 shows a confirmation dialog for removing selected contacts. Step 11 shows a confirmation dialog for removing more than 75% of users. Step 12 shows a success message for the bulk contact removal.

**Step 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

**Step 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

**Step 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.

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# Manage Access Requests

Click to Navigate to Work Instructions

- [Association Requests](#)
- [Access Management](#)
- [Advanced Access Management](#)

- [Global Administrator Access](#)
- [Accountable Program Contacts](#)

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# 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 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

2

Search 							
<input type="checkbox"/>	Name 	Partner Name 	Email 	Cisco.com User ID 	Location Address 	Status 	Days Pending 
<input checked="" type="checkbox"/>	Smith, John	Partner123 (US)	jsmith@partner123.com	jsmith123	Site address	Pending	19
<input type="checkbox"/>	Ng, Charles	Partner123 (US)	C_ng@partner123.com	cng4567	Site address	Pending	5

3

Approve

Deny



Only PSS Administrator can complete this task:

- Review contact details
- If you wish to remove any requests, unselect the appropriate checkboxes
- 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



4



Name



Email



Cisco.com  
User ID



Location Address



5



Smith, John

jsmith@partner123.com

jsmith123

Partner123  
9000 Catalyst Way  
Milpitas, CA 95134  
United States

6

Submit

Cancel

Only PSS Administrator can complete this task:

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

## Employee Initiated (Approval) - Continued

### Association Requests

Employee Initiated Requests

PSS Administrator Initiated Requests

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

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

7

### Request Approved

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

Search



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

View All Employee Initia...

Only PSS Administrator can complete this task:

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

## Employee Initiated (Denial)

### Association Requests

Employee Initiated Requests

PSS Administrator Initiated Requests

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

To approve a request, choose a contact and click on “Approve” button, confirm and submit

8

### Request Denied

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

Search



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

10

Submit

Cancel

Only PSS Administrator can complete this task:

Click on task:



Association Requests





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

## PSS Administrator Initiated Requests to Change Location or Cancel

### Association Requests

#### Employee Initiated Requests

#### PSS Administrator Initiated Requests

Search 				
<input type="checkbox"/>	Name 	Registration Date 	Country 	Status 
<input checked="" type="checkbox"/>	Smith, John	Sep-09-19	United States	Pending
<input type="checkbox"/>	Ng, Charles	May-10-20	United States	Pending

Change Location

Cancel Request

#### 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

Submit

Cancel

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

- 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.
- 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

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# Access Management

## Why this is Important:

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

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

## Click to navigate to:

[View and Edit Company Access](#)[Request Additional Access](#)[View / Remove My Access](#)[Locate PSS Administrator](#)

Only PSS Administrator can complete this task:

Click on task:  Access Management

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

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

1

Company Access

Request Additional Access

View/Remove My Access

Company Access

2

+

Search for Tool Users in Company

3

Access Privilege	<a href="#">Program Management &amp; Application (PM&amp;A) Administrator</a>
Please select a Country/Country Group	CANSAC

4

Submit

Only PSS Administrator can complete this task:

- To edit access, click the “Add/Remove Access” button
- A pop-up screen will appear, un-check / check the checkboxes in order to revoke or grant access to selected tool Country / Country Group
- 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

tribution.

7

Next

Reset



Only PSS Administrator can complete this task:

8. A pop-up screen will appear where you can enter your comments for adding or revoking access.
9. Click the “Submit” button to remove access privileges. A confirmation screen will appear.

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

8

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

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

Country/Country Group: CANSAC

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

9

Submit Cancel

Only PSS Administrator can complete this task:

Click on task:  Access Management

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

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

1

Company Access

Request Additional Access

View/Remove My Access

### Company Access

2

 [Search for an Individual](#)

3

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

Cisco.com ID

OR

Email Address

OR

First Name (optional)

Last Name

4

Submit

Only PSS Administrator can complete this task:

- Click “Add/Remove Access” button
- A pop-up screen will appear, uncheck / check the checkboxes in order to revoke or grant access to selected tool Country / Country Group
- 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

tribution.

7

Next

Reset

Only PSS Administrator can complete this task:

8. A pop-up screen will appear where you can enter your comments for adding or revoking access.
9. Click the “Submit” button to remove access privileges. A confirmation screen will appear.

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

8

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

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

Country/Country Group: CANSAC

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

9

Submit

Cancel

Only PSS Administrator can complete this task:

Click on task:  Access Management

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

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

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

## View and Edit Company Access (View All Contact Access)


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

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

Click on task:  Access Management

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

### Why do I need to do this?

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

## Request Additional Access

1

Company Access

Request Additional Access

View/Remove My Access

### Request Access

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

2

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

Select One


**Please select a Country/Country Group:** United States

3

Submit

4

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

Search 

#### Admins

4

**Baker, Nicky (United States)**  
Nicky\_baker@partner123.com

**Smith\_John (France)**  
John\_Smith@partner123.com

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

Click on task:  Access Management

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

### Why do I need to do this?

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

## View / Remove My Access

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)

3

Update

Reset

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

Click on task:  Access Management

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

## Locate My PSS Administrator

1

Company Access

Request Additional Access

View/Remove My Access

### Request Additional Access

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

Select the tool you need access to:

2

Partner Self Service (PSS) ▼

Please select a Country/Country Group:

3

GULF ▼

4

Submit

5

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

Administrator(s) ⚡

**Smith, John (GULF)**

✉ [John@ciscopartner.com](mailto:John@ciscopartner.com)

GULF

**Hansen, Natalie (GULF)**

✉ [Natalie@ciscopartner.com](mailto:Natalie@ciscopartner.com)

GULF

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# Advanced Access Management

## Why this is Important:

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

## Click to navigate to:

[Work Instructions](#)

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

Click on task:



Advanced Access  
Management

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

[PSS Advanced Access Management guide](#) for:

- Partner Experience Platform (XP)
- Enterprise Agreement Management Platform (EAMP)
- Digital Lifecycle Selling Experience (DLSE)
- Cisco Commerce Workspace (CCW) - *Only Direct Partners and Distributors*
- Distributor Business, Sales and Incentives Applications

## Advanced Access Management

**Advanced Access Management**

Click the button below to leverage the Advanced Access Management portal to add, manage or remove access to specific features and reporting for multiple tools including PXP, EAMP, DLSE, and CCW (only Direct Partners and Distributors)

This will also allow you to provide user access to the “Disti Partner View Management” functionality.

**Manage Cisco Tools Access**

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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 PSS Administrator can complete this task:

Click on task:



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

### Important

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

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

## Manage Global Administrator Access

### 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 PSS Administrator can complete this task:

- Choose any of the search options presented, then enter your criteria
- Click the “Search” button to display your contacts and their access levels
- Your search results will be displayed
- 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.

3

Contact Information

Select One

▼

4

Country

Select One

▼


Or

Search

5

Contacts

6

 Steve Smith

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

Edit

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

### Payment Administrator

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

### Copy Contacts

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

## Tool Access: Partner Experience Platform (PXP)

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

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

from Global Easy Pay (GEP).

Refer to the [Global EasyPay Training and Documentation](#) page to find the PXP Payment Notification user guide.



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

Click on task:



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

To Add Accountable Contact, proceed to steps [here](#).

#### Why this is Critical

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

## View and Delete Contact

### Accountable Program Contacts

#### Accountable Program Contacts

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

Search <input type="text"/>				
Name	Function	Role	Email	Action
Smith, Tom	Program - Cisco Services Partner Program	Copy Contact	Tom_Smith@partner123.com	Delete
Hansen, Natalie	Program - Value Incentive Program	Rebate Coordinator	Natalie_Hansen@partner123.com	Delete

[+ Add Accountable Contact](#)

1

Select Geography

Select Geography

EXPEREO INTERNATIONALBV (NETHERLANDS) [Select](#)

EXPEREO INTERNATIONALBV (UK) [Select](#)

EXPEREO SINGAPORE PTE LTD (SINGAPORE) [Select](#)

4

Confirmation

Are you sure you want to delete Program Contact?

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

[Yes](#) [No](#)

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

Click on task:



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

Proceed to [Step 5](#)

#### Important

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

## Add a New Contact

### Accountable Program Contacts

#### Accountable Program Contacts

The following contacts have been assigned for your company

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

#### Add Accountable Program Contact

Complete the following steps to add a Program Contact. You can assign a Program Contact to a different country group within your company.

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

Search Contacts

1

Select Geography

Select Geography

EXPEREO INTERNATIONALBV (NETHERLANDS) Select

EXPEREO INTERNATIONALBV (UK) Select

EXPEREO SINGAPORE PTE LTD (SINGAPORE) Select

Search

2

Accountable Program Contacts

The following contacts have been assigned for your company

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

4

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

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

Last Name First Name

Last Name First Name

OR

Cisco.com Id

Cisco.com Id

OR

E-mail

E-mail

Search

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

5. Your search results will display, select the individual whom you would like to assign a specific program role to
6. Click radio button next to user and the “Select” button

Proceed to [Step 7](#)

### Important

Once you select your preferred contact, the next sections will cover the steps to assign:

- Copy Contacts
- Rebate Coordinator
- Payment Administrator

## Add a New Contact - Continued

### Accountable Program Contacts

 [Add Accountable Program Contact](#)

5

#### Search Results

CCO ID ◆	Contact Region ◆	Company Name ◆	Company Name ◆	Email ◆
<input type="radio"/> Partner123	Netherlands	Tom Smith	Partner123 International	tsmith@partner123.com

6

Select

[Only PSS Administrator](#) and the [Payment Administrator](#) can complete this task:

- Choose the program role that you would like to assign your chosen contact to. Refer to the [Role Definitions](#) for more information

Proceed to [Step 8](#)

### Important

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

To view program enrollments, refer to the [Partner Program Enrollment](#) application

## Add a New Contact – Continued (Rebate Coordinator Example)

### Accountable Program Contacts

Add Accountable Program Contact

#### Search Contacts

Hansen, Natalie

#### Business Address

456 Cisco Way  
San Jose, CA  
95131  
United States

#### Role

7

#### Select One

[Copy Contact 1](#)  
[Copy Contact 2](#)  
[Copy Contact 3](#)  
[Payment Administrator](#)  
[Program Coordinator](#)  
[Rebates Coordinator 1](#)  
[Rebates Coordinator 2](#)

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

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

If you would like to delete an assigned accountable contact and role, click [here](#) for steps

### Important

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

To view program enrollments, refer to the [Partner Program Enrollment](#) application

## Add a New Contact – Continued (Rebate Coordinator Example)

### Accountable Program Contacts

Add Accountable Program Contact

8

#### Search Contacts

Hansen, Natalie

#### Business Address

456 Cisco Way  
San Jose, CA  
95131  
United States

#### Role

Rebates Coordinator 1

#### Function

Program

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

9

Add

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# Manage Other Information

Click to Navigate to Work Instructions

[Distributor Partner  
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[View and Download Reports](#)

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[Cisco Sales Contacts](#)

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# Disti Partner View Management

## Where You Can Find Resources

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

## Click to navigate to:

[Work Instructions](#)

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

Click on task:



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

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

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

## Disti Partner View Management

The screenshot shows a user interface for "Disti Partner View Management". On the left is a sidebar menu with items: "My Profile", "Advanced Access Management", "Disti Partner View Management" (highlighted in blue), "Access Management", "Company Details", and "Location Management". The main content area has the title "Disti Partner View Management" followed by a green horizontal line. Below this is a yellow box containing text: "Leverage this portal to facilitate stronger collaboration between a Distributor and a Reseller by which the reseller can provide a controlled access to their insights for specific areas within PXP." and "Note that only Resellers having at least one current or previous DPV relationship initiated by a Distributor can leverage this functionality." Below the note is a blue circle with the number "1" and the text "Contact your PSS Admin to gain access to this functionality." At the bottom right of the yellow box is a dark blue button labeled "Manage DPV Relationships".



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# View and Download Reports

## Why this is Important:

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

## Click to navigate to:

[Work Instructions](#)

Only PSS Administrator can complete this task:

Click on task:  Reports

- 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
- To view the report generated during “Bulk Contact Removal” click the “Manage Multiple Contacts Log” link
- 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 with](#)

[All Individuals](#)

[WW Partner Qualif](#)

[WW Cisco Certified](#)

[All Opt In Company](#)

[All Accountable Co](#)

### Manage Multiple Contacts Log

3

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

[Manage Multiple Contacts Log](#)

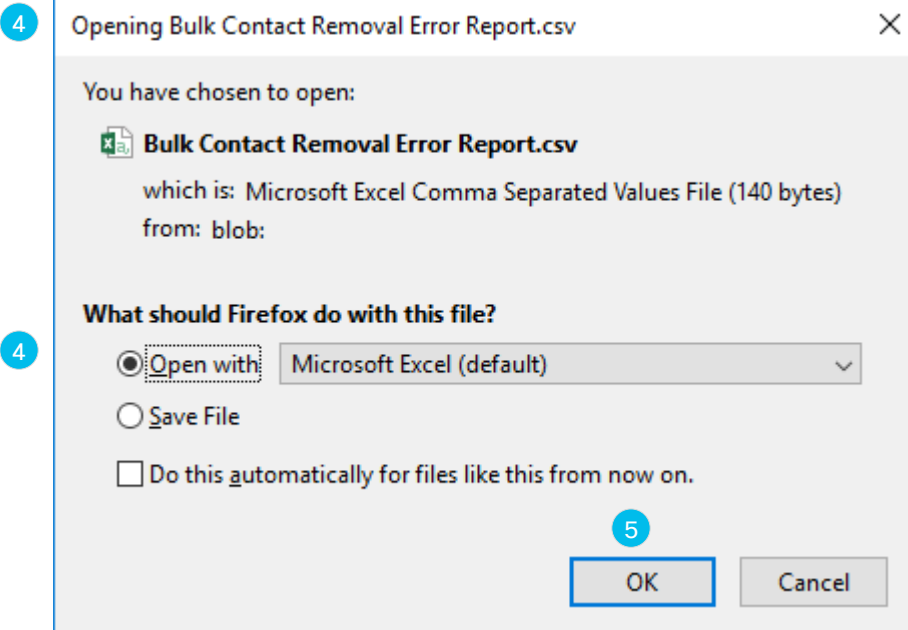
Only PSS Administrator can complete this task:

- 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 menu
- Click “Ok” to open the file

## View and Download Reports - Continued

Reports

Partner123

[\[Change\]](#)

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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.

## Click to navigate to:

[Work Instructions](#)

Only PSS Administrator can complete this task:

Click on task:  Cisco Sales Contacts

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

### Important

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

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

## Cisco Sales Contacts – Channel Account Team

### Cisco Sales Contacts

1

\* Customer / Partner Name  
Partner123

1

\* Country  
United States

State / Province  
Select One

City  
City

Postal Code  
Postal Code

Roles  
PSSM, PAM, PBM,...(45)

2

Submit

Clear

3

### Channel Account Team

### Who is My Cisco Rep?

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

Only PSS Administrator can complete this task:

Click on task:  Cisco Sales Contacts

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

## Cisco Sales Contacts – Cisco Representative

Channel Account Team		Who is My Cisco Rep?			
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

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# Support & Resources

## Why this is Important:

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

## Click to navigate to:

[Useful Links](#)

## Support & Resources

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

### Issues

### How to resolve

#### Access Management

- Access to tools (assign partner admin role)
- Tool support (partner reg., associate contacts, assign rebate coordinator, etc.)

Open a [Partner Tools support case](#) if a review of this guide does not answer your question.

- Service Access Management Tool (SAMT)

For more information, refer to the following SAMT resources: [Website](#), [Training](#), and [SAMT Support](#).

#### Program Set-Up

- **Enrollment:** Not able to complete Channel Program Incentive Agreement (CPIA) enrollment.
- **Login** issues
- **Associating** your Cisco.com ID with your company

For more information, refer to the following:

- [CPIA User Guide](#)
- [Partner Self Service tool](#)

Contact one of the PSS Administrators for your company.

#### Compensation

- Rebate claim notification not received due to incorrect or missing contact information
- Rebate coordinator not assigned
- Incorrect beneficiary name or country on claim notification
- Questions regarding payment amounts

Contact one of the PSS Administrators for your company to ensure that a Rebate Coordinator has been assigned for the programs of your choice

Open an [Incentives and Funds Program Support](#) case





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# 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