



# Cisco Customer Loyalty program

## Customer Portal

Customers designated as Team Captains and Team Players qualified to participate in the Cisco Customer Loyalty program are allowed access to the Customer Portal tool. In this program, customers are assigned loyalty points based on their purchases with Cisco Systems, Inc. Customer Team Captains, Team Players and Cisco Account Managers can view point transactions as: assigned, redeemed and expired transactions.

Upon viewing the balance of loyalty points available, it is expected the Customer Team Captain will work with the Cisco Sales Account team to build a learning map and redemption plan for their company. Through the Cisco Customer Loyalty program, the Customer Team Captain redeems valuable Cisco Learning Services and Cisco Learning Partner rewards further developing and defining their IT business environments.

This document provides details of the various features the tool has to offer to the end users of this customer portal.

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# User Profile: Team Captain, Team Player or Account Manager

## Step 1: Logging into the Cisco Customer Loyalty Portal

- a) Access Customer Portal URL : <http://customerloyalty.cloudapps.cisco.com/crtmgr/jsp/customer/index.jsp>
- b) User will be navigated to a page which prompts user name and password. Enter CCO Username and Password.

- c) Upon successful login, user sees the Customer Portal. The following details are displayed upon login:

Points Status	Points Available	Points Redeemed	Points Expired
Available	19,650		
Redeemed		175,538	
Expired			0

- Account Name: Name of the Customer/Account
- Total Points Available: Amount of available points for reward redemption

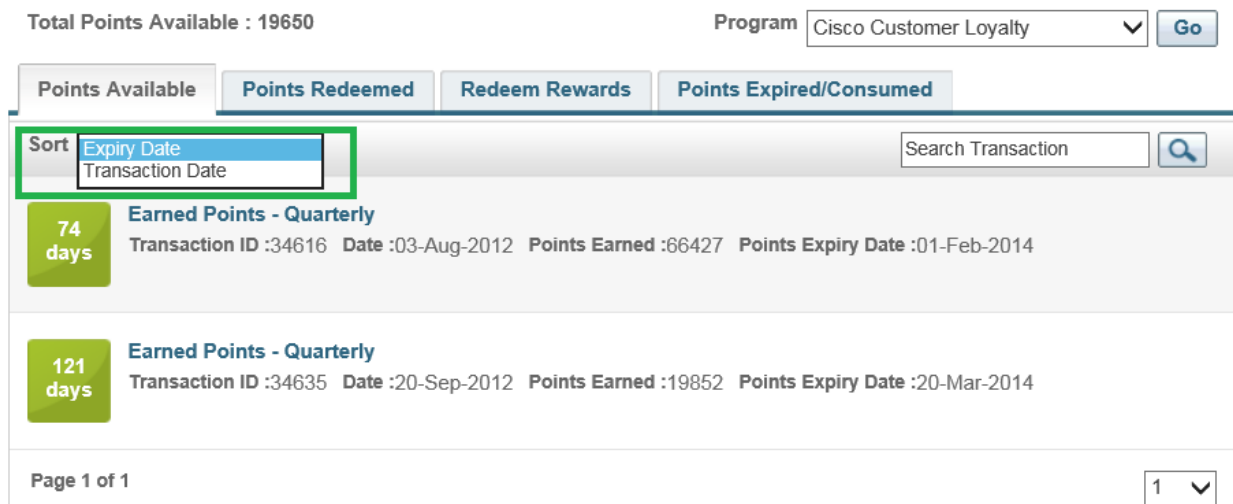
- Program Name: Name of the Participating Program. In this case the Cisco Customer Loyalty program.
- Page Navigation: Allowing user to navigate up and down the page.
- Tab Navigation: Points Available (Default), Points Redeemed, Redeem Rewards, Points Expired/Consumed. The Redeem Rewards is a new tab available only to the Team Captain for reward redemptions.
- Transaction Details: Statement of all the transactions.
- Other Information Areas: Points Status Charts, Monthly Reports Summary & Related Links Module.

## Step 2: Checking Points Transaction Activity: Points Available, Points Redeemed, Redeem Rewards and Points Expired/Consumed

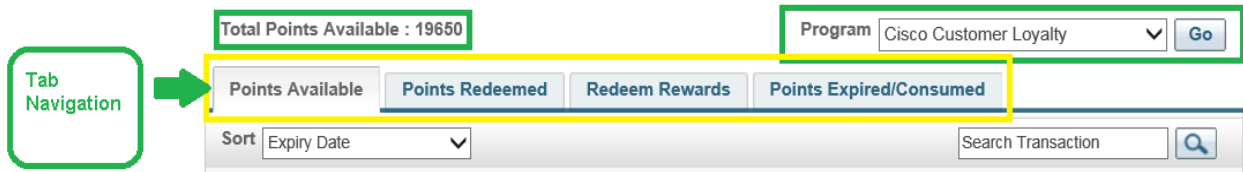
- a) Points Available Tab: By default, the user is navigated to the Points Available tab. The points balance displayed belongs to the Program displayed on the right.



- b) In the above example: The user is viewing an available balance of 19650 POINTS from the “Cisco Customer Loyalty” program.
- c) The user may sort the list of displayed transactions using different sorting options such as Transaction Date or Expiry Date. The screenshot below displays the transaction(s) being sorted by either of the selected options.



- d) The user may navigate from one tab to another tab (“Points Available”, “Points Redeemed” “Redeem Rewards” and “Points Expired/Consumed” tabs) to view a different set of transaction(s) under each category.



### Step 3: Understanding Transaction Details

#### a) Points Available Transactions:

In the transaction snapshot below, the duration in days indicates the number of days the earned points will remain available in ACTIVE status. Beyond the Points Expiry Date the points will expire. Points are valid for 18 months from the date of assignment. No extensions are provided as Customers are encouraged to redeem points before expiration.



#### b) Points Redeemed Transactions:










Transactions listed under this tab provide the user with redemption detail.

- Transaction Icons: Five different icons of Completed, In Progress, On Hold, Submitted and Notes indicate the redemption progress.

Total Points Available : 13100 Program Cisco Customer Loyalty

Points Available Points Redeemed Redeem Rewards Points Expired/Consumed

Sort Completed Date Search Transaction

	<b>XXX Points on purchase of CCNP Written Exam</b> Transaction ID :35736 Transaction Date :23-Jan-2014 Points used from Assignment Transaction ID:34615 Attachment: <a href="#">Template.xls   CCNP Exam_Test.xls</a>	<a href="#">Upload File</a> <a href="#">Update Points</a> 
	<b>XXX Points on purchase of CCIE Written Exam</b> Transaction ID :35735 Transaction Date :22-Jan-2014 Points used from Assignment Transaction ID:34615 Attachment: <a href="#">Template.xlsx   CCIE Written Exam_test.xlsx</a>	
	<b>10000 Points on purchase of Cisco Learning Credits</b> Transaction ID :35510 Transaction Date :19-Nov-2013 Points used from Assignment Transaction ID:34616	
	<b>200 Points on purchase of Cisco Learning Credits</b> Transaction ID :35483 Transaction Date :18-Nov-2013 Points used from Assignment Transaction ID:34616	
	<b>100 Points on purchase of Cisco Learning Credits</b> Transaction ID :35482 Transaction Date :18-Nov-2013 Points used from Assignment Transaction ID:34616	Completed on 18-Nov-2013

On Hold - Check Notes

Submitted - Awaiting Processing

Completed

Click on Note icons for details



- Notes Icons: Notes icon provides you with more details about a transaction.


Example: The transaction for **XXX Points on purchase of CCNP Written Exam** is on hold.

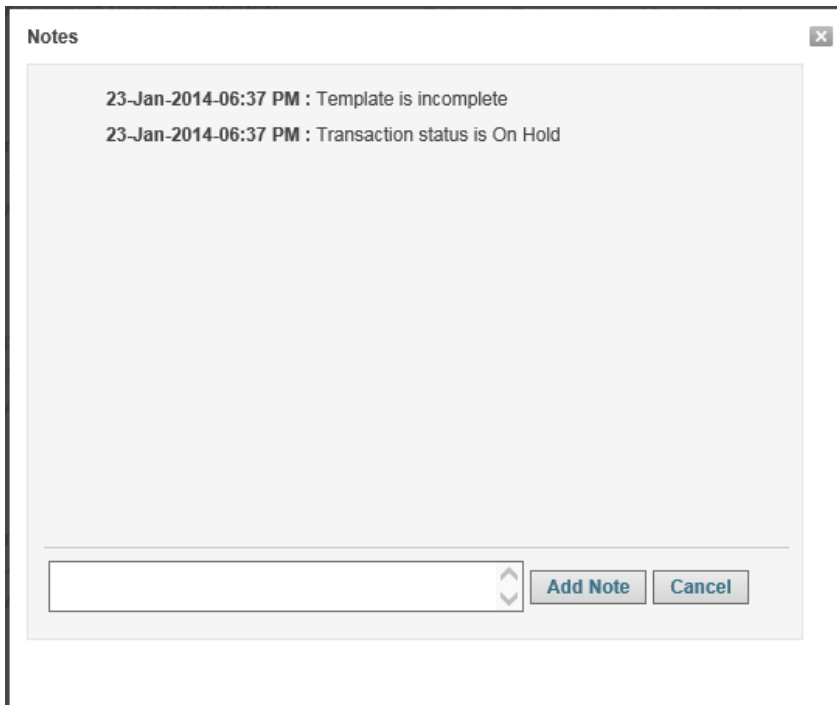
Total Points Available : 13100 Program Cisco Customer Loyalty

Points Available Points Redeemed Redeem Rewards Points Expired/Consumed

Sort Completed Date Search Transaction

	<b>XXX Points on purchase of CCNP Written</b> Transaction ID :35736 Transaction Date :23-Jan-2014 Points used from Assignment Transaction ID:34615 Attachment: <a href="#">Template.xls   CCNP Exam_Test.xls</a>	<a href="#">Upload File</a> <a href="#">Update Points</a> 
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Below window will appear once you click on the Notes icon . From here you can understand the reason of placing on-hold and can be used as a communication tool between Cisco Customer Loyalty team and the Account Manager/customer.



Based on the Notes description, you are requested to complete the template for CCNP Written Exam. When you are ready, click on Upload File [Upload File](#) and Update Points [Update Points](#) to complete your transaction.

Upload File window:

**\*Upload File** x

Select File:

Updates Points window:

**\*Update Points** x

Transaction Id : 35736

Redeemable Offering Type : CCNP Written Exam

Redeemable Product : CCL 642-467 CAPPs v8.0

Product Price : **XXX**



New Product Quantity :

Points Entered Before :

- Points used from Assignment Transaction ID:

Points Available | Points Redeemed | **Redeem Rewards** | Points Expired/Consumed

Sort  Search Transaction

 **200 Points on purchase of Cisco Learning Credits** 

Transaction ID : 35483    Transaction Date : 18-Nov-2013

Points used from Assignment Transaction ID: 34616 Estimated Redeem date 22-Nov-2013

Notice the Reference Transaction ID from which the redeemed quantity of Loyalty Points has been debited. Clicking on the Assignment transaction ID (e.g. Transaction ID: 34616) in the above screenshot, results in displaying the details of the transaction on a pop-up page.

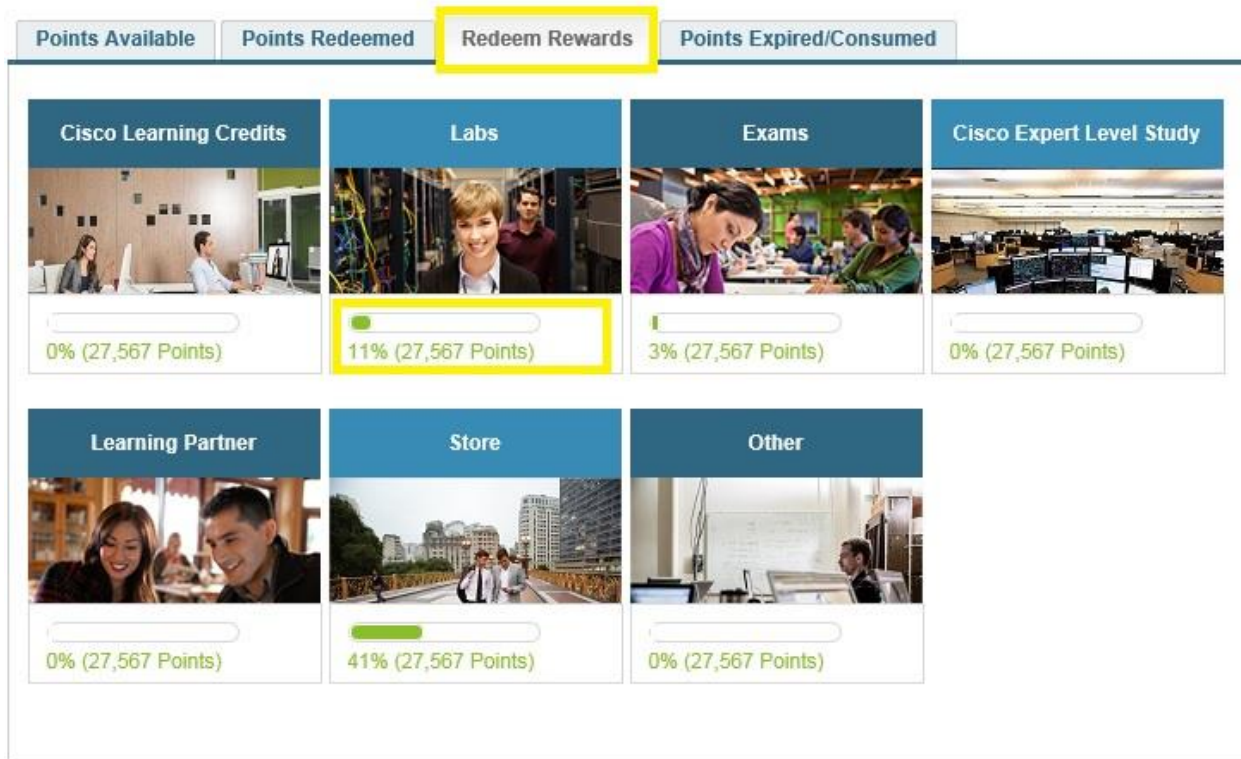
Transaction Details - Points Earned			
Transaction ID	: 34644		
Date	: 21-Nov-2012		
Transaction Type Description	: Earned Points - Quarterly		
Reason Code Description	: Quarterly Reward Point Assignment		
Notes	: G1FY13		
<b>Points Summary</b>			
Points Earned	132500		
<b>Points Redeemed</b>			
Date	Description	Transaction ID	Points
13-May-2014	Cisco Learning Credits	35463	2300
27-Apr-2014	Cisco Learning Credits	35387	30000
14-Apr-2014	Cisco Learning Credits	35363	40000
02-Apr-2014	Cisco Learning Credits	35329	46000
<b>Total Redeemed</b>			<b>118300</b>
<b>Available Points</b>			<b>14200</b>

c) Redeem Rewards Transactions (Team Captains Only):

This tab is only available to the Team Captain.

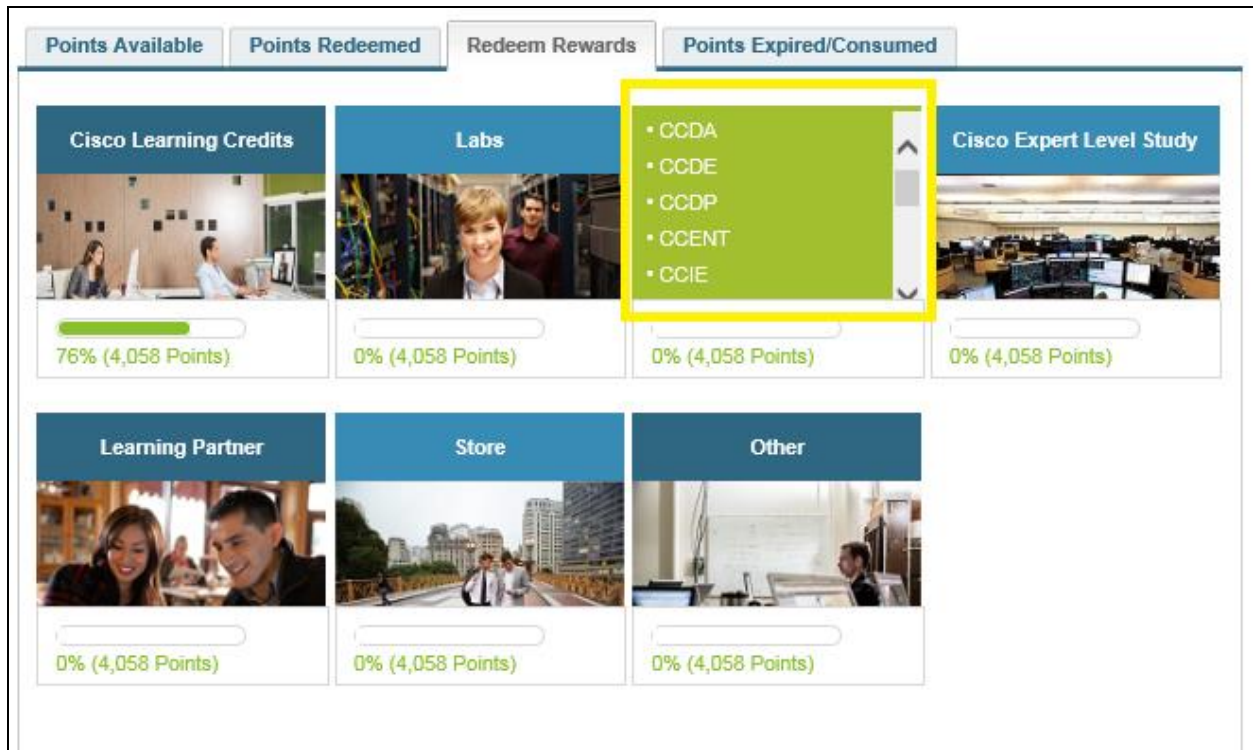
It allows the Team Captain to request redemption of their loyalty points for rewards by:

1. Choosing a Category Tile to select a reward
  - The percentage under the Category Tile displays the usage of loyal points for that category





2. Doing a mouse over a Category Tile displays a list of Product Offerings, for example, Exam offerings (as shown)
3. Clicking on a Product Offering, such as CCIE; a Redeemable Product screen will pop up



4. Selecting "Redeemable Product" from drop down list, and then clicking on the "Add" button. Or, type partial text and a smaller list will appear using "type ahead" technology.

**Redeemable Product :** CCL 350-018 CCIE Security Quantity :

**Download Template File:** [CCIE-template.xlsx](#) **Upload File:**

**File to be Submitted :**

**Notes:**

A group of added redemption requests can be remembered over time or submitted at a later date by clicking “Submit Transaction”. The “Submit Transaction” action sends the redemption requests to the Cisco Customer Loyalty program administrator for processing.

Click on “Submit Transaction”:

Redeem Transaction Details					Submission Date:21-Aug-2014	
Sr. #	Product Redeemed	List Price	Qty	Total Points Used	Estimate Redeem Date	
1	CCL 100-101 ICND1	XXX	1	XXX	28-Aug-2014	
2	CCL 350-001 CCIE R&S	XXX	1	XXX	28-Aug-2014	

View Assign transaction balance, [click here.](#)

Transaction processed:

Points Available | Points Redeemed | Redeem Rewards | **Points Expired/Consumed**

✓ You have successfully posted the Transaction(s) 35947,35948

<b>Cisco Learning Credits</b>  56% (882,562 Points)	<b>Labs</b>  0% (882,562 Points)	<b>Exams</b>  0% (882,562 Points)	<b>Cisco Expert Level Study</b>  0% (882,562 Points)
<b>Learning Partner</b>  0% (882,562 Points)	<b>Store</b>  0% (882,562 Points)	<b>Other</b>  0% (882,562 Points)	

d) Points Expired/Consumed Transactions:

Transactions listed on Points Expired/Consumed tab consist of all those transactions where the assigned points have exceeded the stipulated "Points Expiry Date," or have been consumed for rewards redeemed.

Total Points Available : 27270      Program Cisco Customer Loyalty      Go

Points Available | Points Redeemed | Redeem Rewards | **Points Expired/Consumed**

Sort Expiry Date      Search Transaction

100% means points were used up for redemptions →	 <b>48125 Earned Points - Quarterly - Consumed</b> Transaction ID :34592    Date :17-May-2012    Expired on :09-May-2013    Points Consumed:48125    Points Expired:0
Points were expired →	 <b>100000 Earned Points - Quarterly - Expired</b> Transaction ID :35190    Date :28-Feb-2013    Expired on :18-Jun-2013    Points Consumed:0    Points Expired:100000
	 <b>47990 Earned Points - Quarterly - Consumed</b> Transaction ID :34597    Date :18-Apr-2012    Expired on :31-Jul-2013    Points Consumed:47990    Points Expired:0

**Step 4: Check Balance Statements - Current, Monthly Statements**

In the right hand side (RHS) page areas, Options to view the points in pie-charts are available.

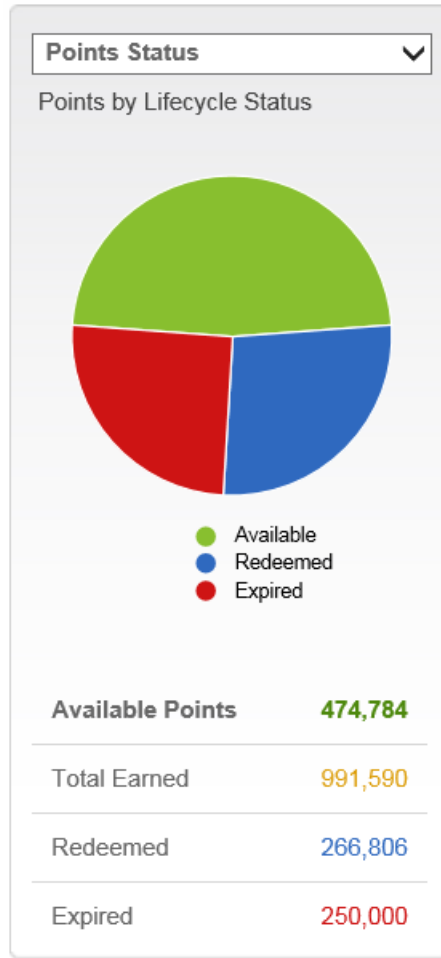
# Points Status

**Available Points:** Points readily available for redemption for a given customer. These points may be available under one or more assignment transaction(s).

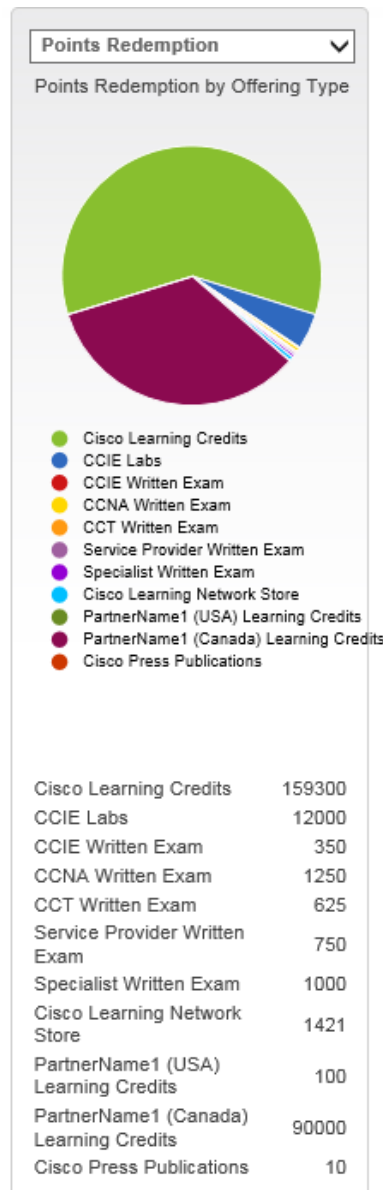
**Total Earned Points:** Points assigned to the Customer thru various assignment transactions within the program.

**Redeemed Points:** Points redeemed by the Customer Team Captain thru various redeem transactions within the program.

**Expired Points:** Points expired due to non-redemption of assigned reward points.



# Points Redemption by Offering Type



**Monthly Summary:** At the end of every calendar month a statement of “Monthly Points Summary” is posted in customer’s account. A summary statement of this monthly balance summary is also sent to the Customer Account Team Captain. Every summary page lists 3 months of each page. Previous and Next Month’s button when clicked, allows the user to view the point summary statement as of end of each calendar month.

**Monthly Summary**

	Earned	Redeemed	Expired
<b>October 2013</b>	0	0	0
<b>August 2013</b>	234567	0	0
<b>March 2013</b>	0	9018	0

◀ Previous Months Next Months ▶

## Monthly Statement e-mail Notification Sample

1. Top section is a summary of the loyalty points activity for the statement month as of the reporting date. This will not include any activities after the statement report date.
2. Bottom section lists any transactions expiring in 90 days as of reporting date. No transaction listed means no points expiring in 90 days.

**Subject:** Cisco Customer Loyalty Monthly Balance Statement for December , 2013

Hello <Customer Name> (Account Name),

Your Cisco Customer Loyalty points account statement as of **1 Jan-2014** is noted below,   
Report Date: When the report was run

**Cisco Customer Loyalty**

Total Earned	0	Number of points earned for the reported month, as of the Report Date
Redeemed	400	Number of points redeemed for the reported month, as of the Report Date
Expired	119057	Number of points expired for the reported month, as of the Report Date
Available Points	<b>213091</b>	Total available points for the account as of the Report Date

Points expiring within next 90 days   
List of transactions with points expiring within 90 days as of Report Date

Program Name: Cisco Customer Loyalty	Assign Transaction Id	Points Assigned	Date Assigned	Points Balance	Points Expiry Date	# Of Days before Points Expiration
	00000	10000	09/20/2012	5550	03/20/2014	68

The points assignment transaction ID

Date when the quarterly points assigned were entered

Number of points remaining for transaction ID (only for this quarterly transaction)

Date when the number of points will expire for transaction ID

Number days before the points for transaction ID expire, counting from the Report Date to Points Expiry Date

You can visit [Customer Loyalty](#) for further details and notes.

Please contact us thru [Customer Loyalty Support](#) or call 1-800-553-6387 (US/CANADA) in case of any questions.

Regards,  
 Cisco Customer Loyalty  
 Program Administration

**Note:** Please log in to the Cisco Customer Loyalty customer portal to view your most current loyalty points balance and activities. Points are valid for 180 days from the “Date Assigned” as shown above.

## Step 5: Related Links Module

User is presented with set of related links that lead to various other Learning @ Cisco sites, Frequently Asked Questions and other Learning @ Cisco training options available to the user.

**Related Links**

- [Frequently Asked Questions](#)
- [Training Options](#)
- [Cisco Learning Network](#)