Xerox® Managed Print Services SCOT Tool

User Guide

Version 5.0

October 2014

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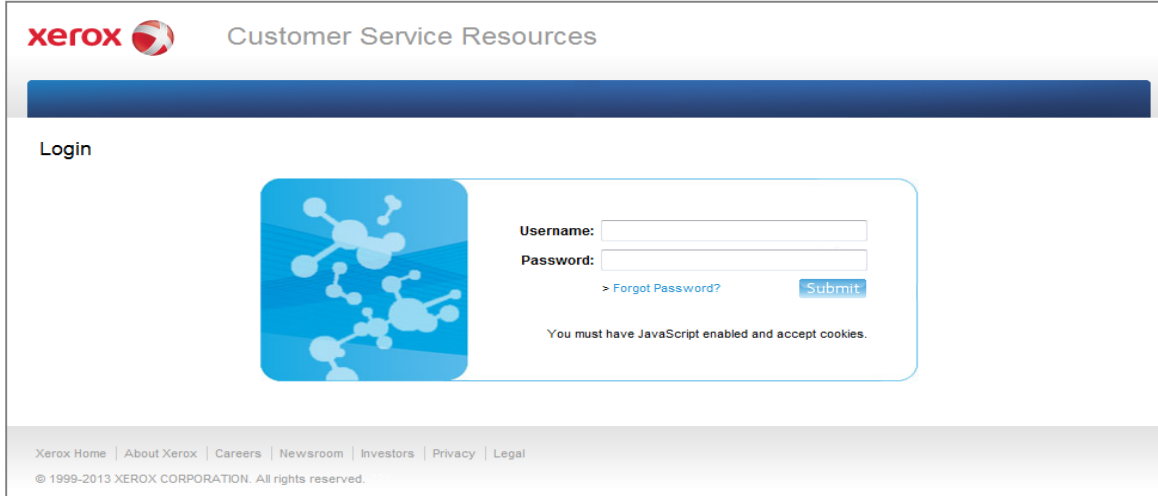
PGPGL-02UC

Table of Contents

1 Screens

To access the Service Contract Ordering Tool (SCOT tool), the Partner will first login to their Reseller Extranet site and navigate to the Print Services home page.

Click on the "Resource Hub Login" link to open a web browser to the SCOT Tool Login screen.

1.1 SCOT User Login Screen

Enter the Username and Password provided when becoming certified. The original, temporary password will need to be changed the first time the login is used.

Once the Username and Password are entered, click the Submit button to proceed to the SCOT tool home screen. Passwords are case sensitive.

Note: If you are an ASP Certified User you may see a different screen prompting you to select your next option. To get into the SCOT tool choose the Xerox® MPS Resource Hub.
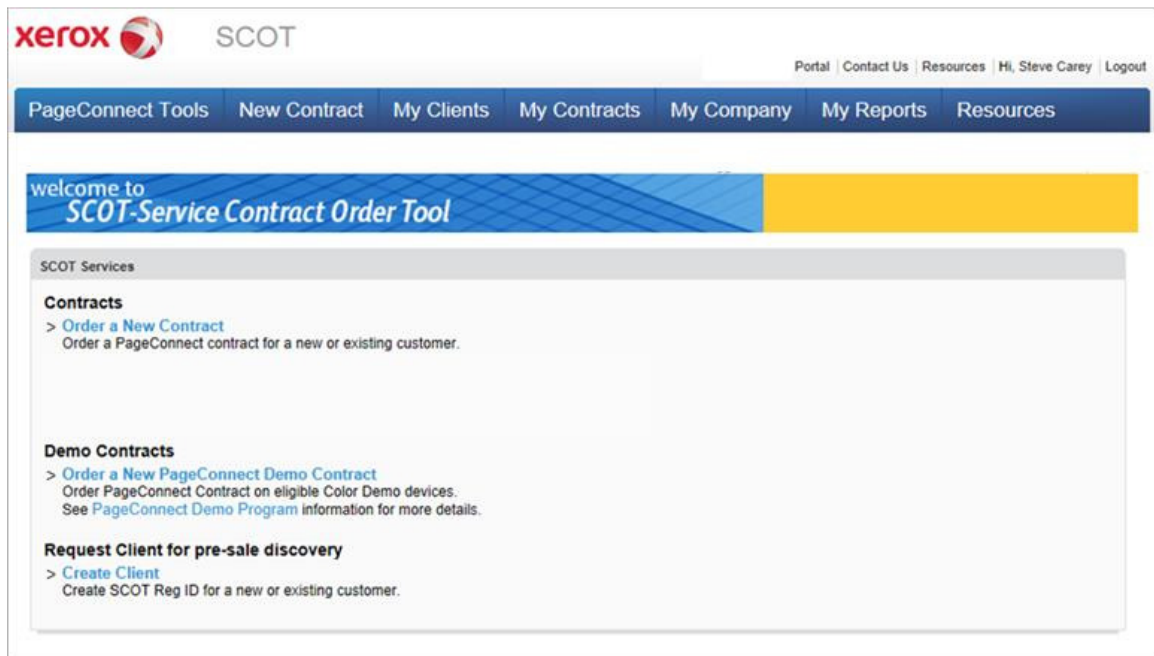
This will take you to the Xerox® MPS Resource Hub page.

Under the Contracts section click on "SCOT – Service Contract Order Tool"

1.2 SCOT Home Screen

The SCOT Tool home screen provides various menu options in the blue bar at the top of the screen, and the most frequently used options in the middle of the page. The following list describes each menu choice, which will be covered in more detail:

Menu Item	Description
New Contract	Order a New PageConnect Contract or a Demo Contract
My Clients	List of Clients with an PageConnect contract and the contract details
My Contracts	List of PageConnect contracts and management of contract renewals
My Company	Partner address and financial information, e.g., credit cards
My Reports	Billing Details information is available in this menu item
Resources	Links to the PageConnect Services Procedures document and current Price List
Portal	Returns you to the Xerox® MPS Resource Hub page
Contact Us	Opens an email to the PageConnect Support Team
Log Out	Log out of the SCOT tool

2 Order New Xerox® PageConnect Services Contracts

2.1 PageConnect Contract for a New Client
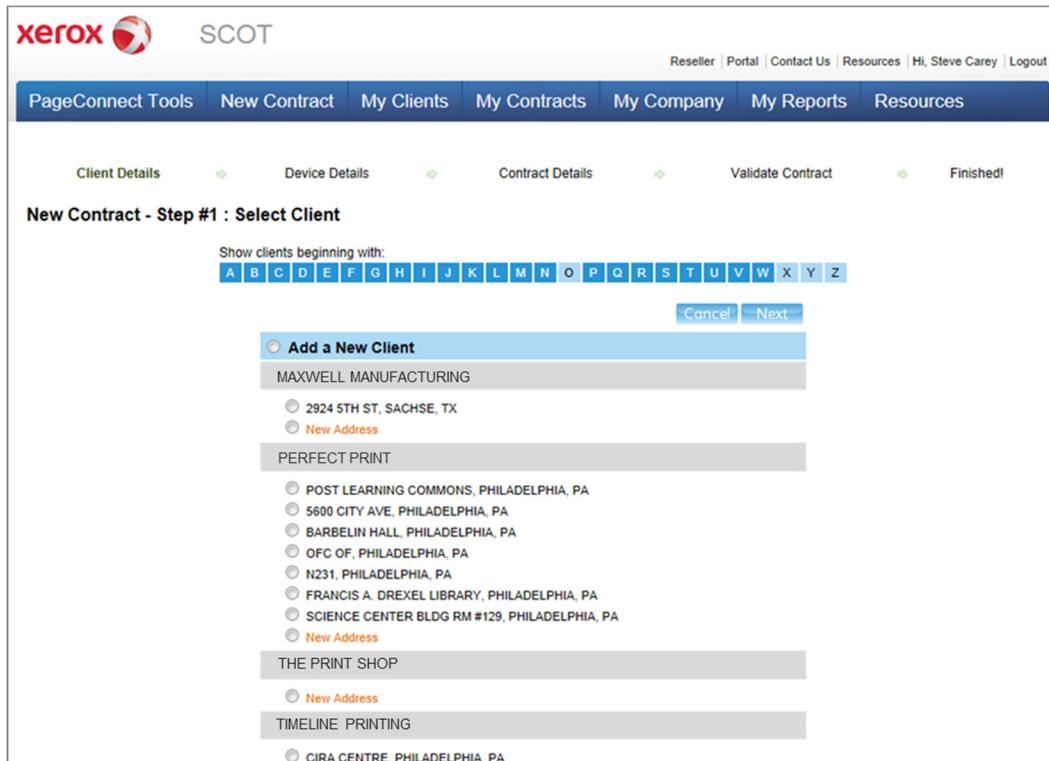
To create a new PageConnect contract, click on the New Contract menu item, or the **Order a New Contract** link in the middle of the SCOT tool landing page.
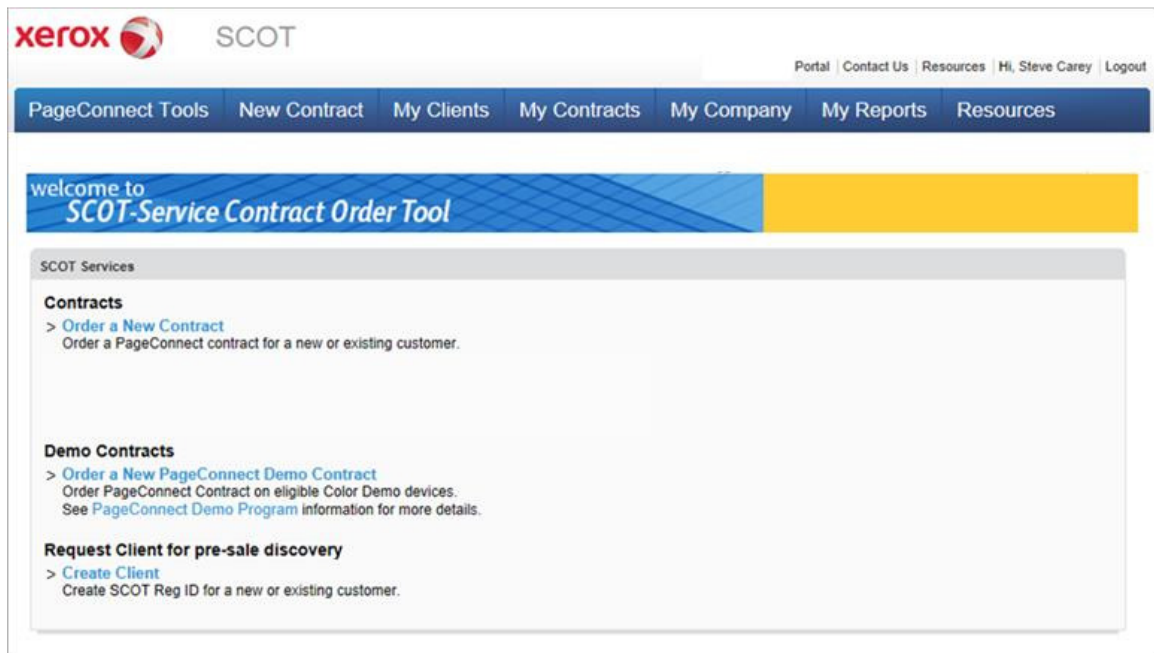
This will open the Select Client selection screen, with a listing of all existing PageConnect customers.

2.2 Select Client

The Select Client screen will have a listing of all existing PageConnect customers in alphabetical order. You can narrow the view of existing customers by clicking on the first letter of the customer in the bar across the top of the page.

To create a contracts for **Existing** clients, select the address where the device will be located. If that address is not shown under the existing client, select the New Address radio button to create under that existing client and click Next. Remember, all devices at the addresses under a client must be on the same customer network so allow communication with the Xerox® Device agent.

2.3 Client Details Entry and Confirmation

For Existing clients the address will be displayed, so only selection of the customer contact for the device must be selected.

For New clients, all client details will be required. Please ensure that all entries have been entered properly, such as the correct zip code or email address. A contact telephone number and email address are also required.

Once all entries have been made and verified, click the Submit Client Details button to go to the Serial Number entry screen.

2.4 Enter Serial Number

Select the contract type and enter serial number on the Enter Device Details screen.

Xerox® Devices: Xerox® devices require only the serial number. The system will then verify the Serial Number for accuracy, and to be sure there is no existing coverage on the device.

Xerox® devices have 9-digit serial numbers: a 3-digit prefix followed by 6 numbers. The prefix may be all letters, such as AUA, or a mixture of letters and numbers, such as L99.

If the Xerox serial number ends in a letter, do not enter that letter or letters. If the serial number is 10-digits and begins with an "S", do not enter the "S", just the last 9-digits. There are also no dash "-"characters in the serial number.

Non-Xerox® Devices: Select the contract types, Supplies & Service or Supplies Only, and then select the Make and Model from the drop-down lists, and the device serial number. Please be accurate, as these serial numbers cannot be validated.

Click the Submit button to move to the next screen.

2.5 Enter Contract Details

The contract details page is used to select the contract length, contract start date, and service provider.

Contract length for Xerox® devices varies depending upon the model, up to 5 years. All contract lengths are in full year increments. Non-Xerox® devices will have 1 year lengths, but can be renewed after the first year with a price uplift as defined in the PageConnect Procedures and Price List.

The contract price is the total amount of the Base Monthly Charge times the number of months in the contract. The total contract amount is not charged at once but is only shown for reference. Billing will be charged as the monthly base amount along with the usage charges. For some models, pages are included in the base amount, so usage charges would be for pages in excess of the pages included. Non-Xerox® models under supplies-only contracts will have no base charge.

Note: If you have requested special pricing through a Special Marketing Exception, or SME, be sure to verify the pricing in the Monthly Usage Charges section. The pricing displayed is the pricing that will apply to this contract.

The Contract Start Date allows the choice to start the contract up to 1 month in the future, to allow for installation of the device and the Xerox® Device Agent software The Xerox® Device Agent Assistant software can be installed prior to this date.

There are 3 Service Types available on most Xerox® models:

- **Xerox** – Xerox will manage service on this product.
  Xerox will manage the service call, including contacting the customer to remote solve the issue, scheduling an on-site service visit if needed, and dispatching the technician. No action is required by the Partner.

- **Partner** – I will manage service on this product. Instruct customer to call.
  With this selection, when a customer tries to create a Service Request in Customer Portal they will receive a pop-up message instructing them to call you, the Partner, and the Partner phone number will be displayed. Xerox will not have visibility of this service request, so it will be up to the partner to manage this service incident, either by delivering the service or contacting the Xerox Customer Support Center for service.

- **Notify** – I will manage service on this product.
  With this selection, the customer will be able to create a Service Incident in the Customer Portal, and all details will be sent to the Partner at the email address selected. Xerox will not take action on this service request, so it will be up to the partner to manage this service incident, either by delivering the service or contacting the Xerox Customer Support Center for service.

Click Continue to proceed to the next screen.

2.6 Select Credit Card

The Credit Card selected on this screen will be automatically charged each month for the billing amount for this serial number. Select the desired credit card from the drop-down list, or Add New Credit Card. Click **Submit Order** for the next screen.

Note: This screen will not appear for Channel Partners who have qualified for open account (Net) terms.

2.7 Validate Contract Data

The Validate Contract screen is a summary of the previous screens and is used to confirm that the data has been entered accurately. Changes can be made by using the Edit button under each section, so the corrections can be entered and applied.

If you have requested special pricing through a Special Marketing Exception, or SME, be sure to verify the pricing. The pricing displayed is the pricing that will apply to this contract.

If all entries on the Contract Confirmation screen are accurate, click on the Submit Contract button to go to the final screen.

2.8 Contract Confirmation Page with SCOT Registration ID

The final screen in the PageConnect Contract ordering process is the Confirmation screen. This contains the contract data as well as the Registration ID, which is required during installation of the Xerox® Device Agent software.

A Confirmation email will be sent with all contract details, and the Registration ID required for installation of the Xerox® Device Agent software. You may also print this page for future reference.

If this is an existing PageConnect customer, the Xerox® Device Agent should already be installed, so no additional action is required. The Xerox® Device Agent will discover the new device and activate the coverage on the contract start date.

Note that for the contract shown above the Registration ID is THEPRINT9639-39771. The format for the SCOT Registration ID is the first 8 characters of the Client Company Name (without spaces or special characters such as the ampersand) usually followed by 4 numbers, a dash character ("-"), and 4 more numbers. The SCOT Registration ID ties together the serial number, client, channel partner, and the Xerox® Device Agent software for ongoing management of the device.

This completes the standard PageConnect contract ordering process.

3 Contracts and My Account Information

3.1 My Clients

You have visibility of your customer information under My Clients, including all created addresses under each client. Click on an address to see all contracts associated with that address. You will also see the SCOT Registration ID, should you need to re-install the Xerox® Device Agent, and a like to initiate an early termination of a contract if needed.

3.2 Update Client Contacts

You can also update client Contact information by clicking on Contact Maintenance next to the Client name. You can Add, Update, or Remove contacts as needed. If you remove a contact who is associated with one or more contracts, you will need to use the Replace functionality so a new Contact is associated with those contracts.

To update the email address or phone number, click Update by the contact you want to change. In the following window update the email address and/or the phone number then click "Submit". If the first or last name is incorrect a new record will need to be created and the old record deleted.

Adding a new contact is a two-step process; both steps must be done before the system will create the account.

Step 1: Click the **Add New** link in the Contact Management screen, to access the Add Contact screen. Enter the new contacts first and last name, email address and phone number in the fields provided and click Submit. When you return to the Contact Management page the new contact will be listed.

Enter the New Contact information to create the contact.

Once the new contact is added, it can be assigned as the contact for contract by clicking
Replace next to the old contact.

Step 2: In the Replace Contact window select a serial number from the Select Device drop down and click the radio button next to the new contact under **Replacement Contact Information**. Click Replace then click OK in the confirmation window. At this point our system will process the new contact and an email with the new contact's username and password will be emailed to the contact's email within 24 hours.
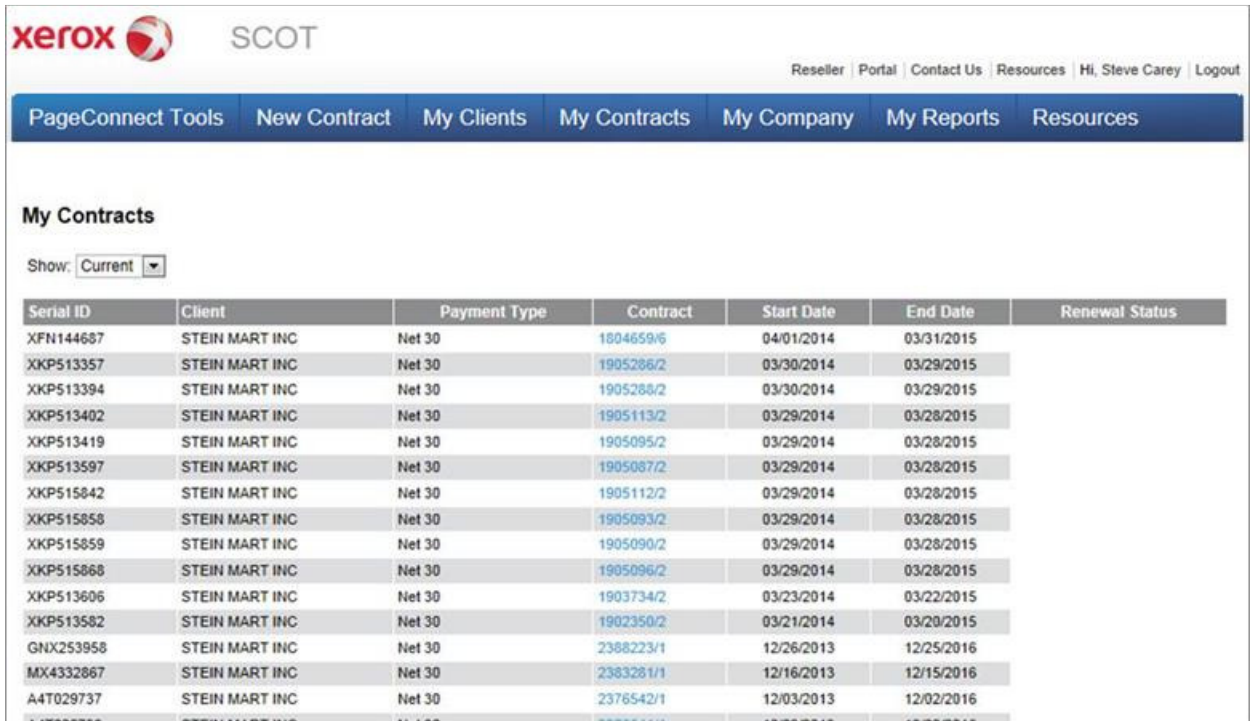
To delete a user account, you are required to replace that user on all devices they are associated with. So, to delete a user from SCOT you would need to do the Replace step above until there are no more serial numbers in that user's drop down.

Once the user is no longer assigned as a contact, the Delete link will be active. Click Delete, you will be asked to confirm the deletion. After you complete the Delete step email **PageConnectSupport@xerox.com** and inform us that a user account has been deleted.

3.3 My Contracts

In the My Contracts area the Channel Partner can view individual contract details, update the page cover limit on Graphic Arts / A3 Color Tabloid Printers and as contracts become eligible for renewal; review pricing and manage the renewal process.

To view the contract details or update the page cover limit on Graphic Arts / A3 Color Tabloid Printers, click the Contract link.

This will open details about the specific contract and device.

Some Graphic Arts models and all non-Xerox® color models have pricing bands based on toner coverage. Contracts should be ordered with the appropriate estimated coverage. However, if toner coverage is higher than anticipated the customer may not receive the toner required to continue printing. In these cases you may need to increase the coverage percentage, which will increase the cost-per-page but also increase the amount of toner available for this device.

To increase the coverage, click the drop-down next to "Change Pricing Coverage to", and select the appropriate coverage percentage. This will update the color price-per-page, and allow additional toner to be ordered for this device.

Contract Renewals

When contracts reach 90 days prior to their End Date, an Expiring Contracts notice will be displayed on the SCOT landing page. The status of Expiring will also be displayed in the Renewal Status column of the My Contracts screen. To review and manage a contract renewal, click on the Expiring link next to a device.

Clicking on Expiring will open the Contract Review Screen below, showing current and renewal information.

The current contract information (base price and usage charges) will be displayed along with the renewal version information. To renew coverage for, simply click the Renew button. All renewals will be for 1 year, at the Renewal pricing. If the contract will not be renewed, click Do Not Renew.

Email notifications will be sent to the Partner at 90 days, 30 days, and again at 5 days prior to the contract End Date. However, selecting Renew or Do Not Review at any point will suspend further notifications.

If no action is taken, the contract will automatically renew for one year with the renewal pricing.

3.4 My Account

The Channel Partner account information is available via the My Company menu selection. Partner address information, payment terms, partial credit card information (if on Credit Card terms is shown.

For Credit Cards, there are three actions for maintenance:

- **Update**
  Edit the current information on the card, such as expiration date.

- **Replace**
  Remove this card and enter a new one in its place. This action will update the credit card on all related contracts.

- **Add New**
  Add a new card. Once added, the new card will be available for new contracts, or the Replace action described above.

3.5 Billing Details

Monthly PageConnect Billing Details information is available in the SCOT tool through the My Reports menu item. Select Billing Details from the list of reports to display the following screen below.

Then select the year and month for the billing period. Select the report type, either HTML for online viewing or EXCEL to download for additional analysis and use in the partner billing process.

Note that this file can also be exported in formats that allow easy upload of meter read data into the billing applications of select affiliated companies.

The report is displayed with one line per serial number per contract. Contract renewals are considered a separate contract and will show the asset on two lines. The first columns of the file display the Customer/Client, the model and serial number, the beginning and end dates of the billing for that serial number and the Base Monthly Charge, which may be split into Service and Supplies for taxation purposes. Note that new contracts or ending contracts may be a partial month, thus showing pro-rated charges and a start date other than the 25th or an end date other than the 24th.

Monthly Invoice Details

Billing Period: **September - 2014**
Reseller Name: **THE PRINT SHOP**
Program: **PAGECONNCET**

Invoice #	Customer	Make	Model	Serial #	Contract ID	Contract Type	Invoice Period Begin	Invoice Period End	Base -Svc
2205707294	MAXWELL MANUFACTURING	Xerox	7535	XKK397019	2055391	PAGEPACK	25-AUG-14	24-SEP-14	$8.00
2205707294	MAXWELL MANUFACTURING	Xerox	3600	MHB897478	2056745	PAGEPACK	25-AUG-14	24-SEP-14	$3.00
2205707294	MAXWELL MANUFACTURING	Xerox	3600	MHB911672	2056744	PAGEPACK	25-AUG-14	24-SEP-14	$3.00
2205707294	MAXWELL MANUFACTURING	Xerox	3600	MHB911936	2056743	PAGEPACK	25-AUG-14	24-SEP-14	$3.00
2205707294	MAXWELL MANUFACTURING	Xerox	3635M	BB1855113	2056739	PAGEPACK	25-AUG-14	24-SEP-14	$8.00
2205707294	MAXWELL MANUFACTURING	Xerox	3635M	BB1858104	2056753	PAGEPACK	25-AUG-14	24-SEP-14	$8.00
2205707294	PERFECT PRINT	Xerox	3635M	BB1858606	2056754	PAGEPACK	25-AUG-14	24-SEP-14	$8.00
2205707									
2205707									
2205707									
2205707									
2205707									

Q	R	T	W	X	Z	AU	AV	AZ	BA	BE
Mono-Beg	Mono-End	Mono-Usage	Color-Beg	Color-End	Color-Usage	Mono-CPC	Color-CPC	Mono-Total	Color-Total	Device Total
114146	117246	3100	190698	198414	7716	0.004	0.04	$12.40	$308.64	$329.04
100	100	0	0	0	0	0.0069	0	$0.00	$0.00	$3.00
100	100	0	0	0	0	0.0069	0	$0.00	$0.00	$3.00
1164	1164	0	0	0	0	0.0069	0	$0.00	$0.00	$3.00
39157	40235	1078	0	0	0	0.0069	0	$7.44	$0.00	$15.44
3584	3584	0	0	0	0	0.0069	0	$0.00	$0.00	$8.00
8053	8421	368	0	0	0	0.0069	0	$2.54	$0.00	$10.54
16608	16648	40	0	0	0	0.0069	0	$0.28	$0.00	$8.28
5088	5295	207	0	0	0	0.0069	0	$1.43	$0.00	$4.43
6072	6123	51	0	0	0	0.0069	0	$0.35	$0.00	$3.35
34740	34862	122	0	0	0	0.0069	0	$0.84	$0.00	$3.84
3894	3896	2	0	0	0	0.0069	0	$0.01	$0.00	$3.01

Continuing with the same spreadsheet, Mono and Color Begin Read, End Read, Adjustments, Invoice Period Usage, Base Included Pages and Usage Pages are displayed in the Billing Details file. Mono, Color and Total costs per serial number are not shown here but are displayed in the rightmost cells of the spreadsheet.

PageConnect billing details information will be available in the SCOT tool no more than 3 business days after the 24th of the month.

4 Xerox® Partner Print Services View in SCOT

In the Xerox® Partner Printer Services program, contracts are initiated in the Print Services Sales Tool, (PSST), rather than SCOT. However, several Xerox® Partner Printer Services functions continue to utilize SCOT, and Partners who are Xerox® Partner Printer Services Certified can access a special Xerox® Partner Printer Services view to access these Xerox® Partner Printer Services -specific functions.

4.1 SCOT Home Screen
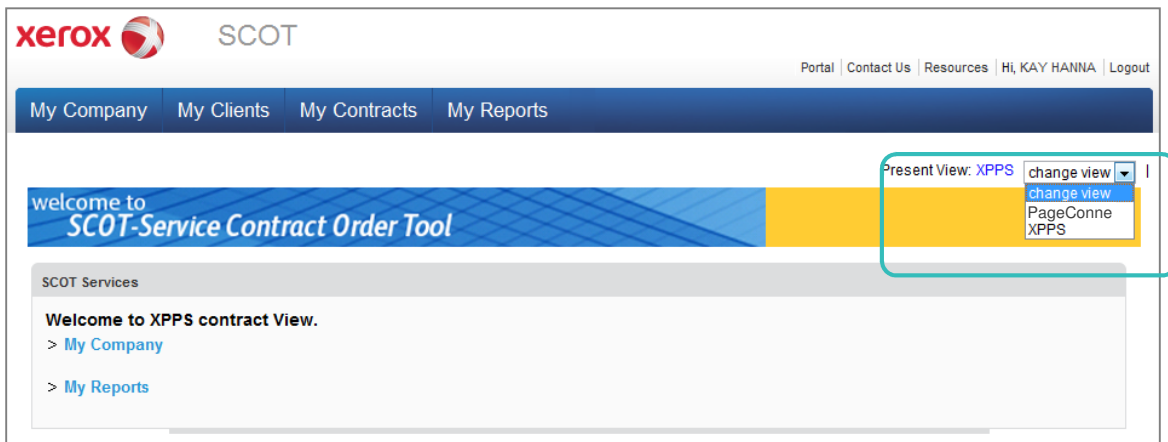
Xerox® Partner Printer Services Certified Partners can change Views between PageConnect and Xerox® Partner Printer Services (referred to as XPPS in the SCOT Tool) in the drop-down in the upper right section of the SCOT home screen. Selecting Xerox® Partner Printer Services will show a limited set of Services and Menu items.

4.2 My Company

The My Company screen is the common between PageConnect and Xerox® Partner Printer Services, and can be used to manage order confirmations, update the Attention line for invoices, maintain company contacts, and manage Credit Cards, (if required). Any updates here will apply to both PageConnect and Xerox® Partner Printer Services activity.

4.3 My Clients

The My Clients screen will show both PageConnect and Xerox® Partner Printer Services clients, as indicated next to the Client Name. In the Xerox® Partner Printer Services view these clients are View Only. Any new Xerox® Partner Printer Services Clients are created in the Print Services Sales Tool, (PSST).

4.4 My Contracts

The My Contracts screen with show only Xerox® Partner Printer Services contracts when the Xerox® Partner Printer Services View is selected. Contract details are available by clicking on the Contract number link for a specific device.

The Credit Card associated with a specific device can also be updated by clicking on the Credit Card number in the Payment Type column.

When a contract is within 90 days expiration, an Expiring link will be shown in the Renewal Status column. Clicking on that link with open the contract details and display current and renewal pricing.

4.5 My Reports

The My Reports screen in the Xerox® Partner Print Services View shows the Billing Details report. This provides details of monthly summary billings, including device information, meter reads, usage, pricing and the billing amount for each device for the month. (Note: This report does not reflect any tax amounts.)

The Billing Details report in the Xerox® Partner Print Services view will show only Xerox® Partner Print Services billings. To see PageConnect billing, change the view to PageConnect and navigate to My Reports.

All other Reporting for the Xerox® Partner Print Services program will be run from the Xerox® Partner Print Services Fleet Management Portal or PSST. Reporting capabilities include Standard Reports as well as analytics using the Xerox® MPS Business Intelligence tool.

5 SCOT Frequently Asked Questions

A current SCOT tool user is no longer at the company. How can a new SCOT tool user be created and how is the previous one removed?

For additional users, please email **PageConnectProgram@xerox.com** with the user's First name, Last name, email address, and telephone number. This email address should also be used to request removal of a user from the SCOT tool.

How do I change my SCOT tool password?

From the Reseller Extranet webpage, go to the PageConnect home page and select Logon to SCOT. On the user login page, select **Forgot Password?**, which will take you through the steps to obtain a new password.

I want to edit/replace/add a credit card in the My Account section of the SCOT tool. How is that done?

Login to the SCOT tool and select My Accounts. For the desired credit card, select Update to update the current credit card information (such as the Expiration Date); select Replace to remove this credit card and replace it with another credit card; select Add New to add a new credit card to the account. The Add New option should only be used if there are less than two credit cards currently entered.

Where can I find my billing information in the SCOT tool?

Billing Details information is available under the Reports menu selection in the SCOT tool. Billing details are available in HTML or Excel format and can be selected based on month and year.

Where can I find the SCOT Registration ID in the SCOT tool?

The Registration ID for each PageConnect device is found in the My Clients menu item of the SCOT tool.

I do not yet have the serial number for the machine. Can I still enter a PageConnect Contract?

No, the SCOT tool must have a serial number in order to complete the contract.

How long does it take from the time a PageConnect contract is orders in the SCOT tool until the device is registered in the system?

It normally takes 24 to 48 hours for the PageConnect contract to be setup in the system. An email notification will be emailed to the Channel Partner when the contract has been setup.

If I am Xerox® Partner Print Services Certified, how do I see Xerox® Partner Print Services-specific activity?

Change the View in the in the upper right corner of the SCOT Home Page to Xerox® Partner Print Services to see Xerox® Partner Print Services-specific activity. Remember, most client management and reporting is done in the Xerox® Partner Print Services tool suite, and only limited Xerox® Partner Print Services functions are supported in SCOT.

For Non-Xerox® devices, what contract lengths are available?

Non-Xerox® models have initial contract lengths of 1 year, with annual renewals after the initial term.

How do I increase coverage levels on models with page coverage-based pricing levels?

Xerox® Graphic Arts models and non-Xerox® color models have pricing bands, based on the toner coverage levels. (See the PageConnect Procedures and Price List for more details.) To increase the coverage, and the toner provided for these devices, go to My Contracts, select the contract for the related device, and in the Update Contract Details page next to the "Change Pricing Coverage to:" select the appropriate coverage percentage. This will update the cost-per-page going forward, and will allow additional toner to be ordered for this device.

What if I need to terminate a contract early?

For early termination, go to the same Contract Details page, and click on the Early Contract Termination link. That will open a termination screen, where you select the termination date and reason for the termination. Note that early termination in the first 36 months of coverage for Xerox® devices may result in an early termination charge. Please refer to the PageConnect Procedures for more details.