Simplifying the Cisco Software Experience

Cisco Commerce Workspace (CCW): Ordering and Assigning Smart Accounts for Partners and Distributors

Presenter

Title

December 2015

Smart Account and Smart Licensing Training

Live Training Schedule

Activity	Time	Role Description	Managing Application
Module 1: Smart Licensing Overview and Setup	1 hour	• All	Cisco Software Central (CSC)
Module 2: Order and Assign Smart Products	1 hour	• Person placing orders • Person assigning order from Holding Account to Customer Smart Account	Cisco Commerce Workspace (CCW)
Module 3: License Management	1 hour	• Software license and purchasing approver • License administration and management	Smart Software Manager (SSM) & License Registration Tool (LRP)

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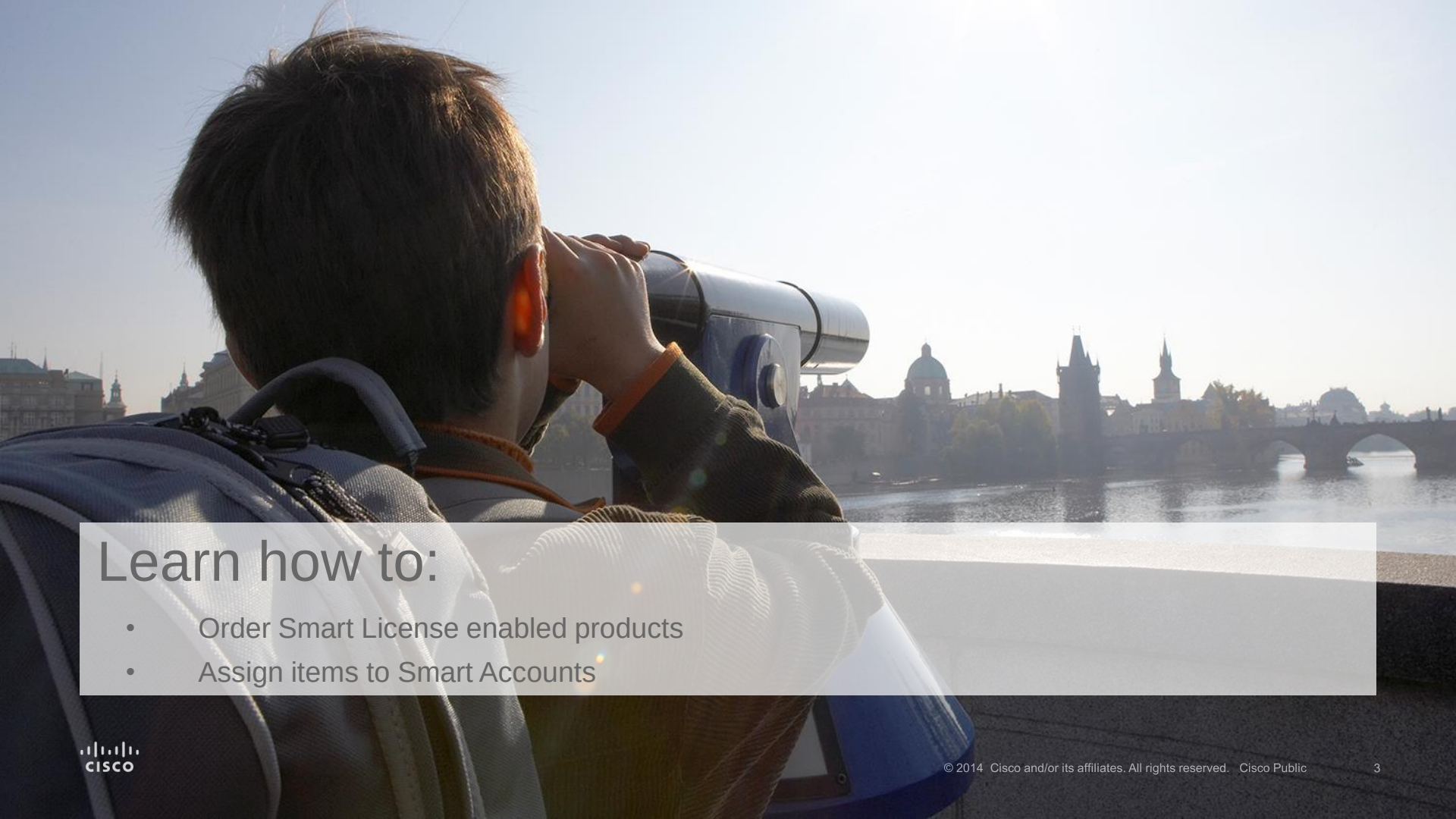

Learn how to:

- Order Smart License enabled products
- Assign items to Smart Accounts

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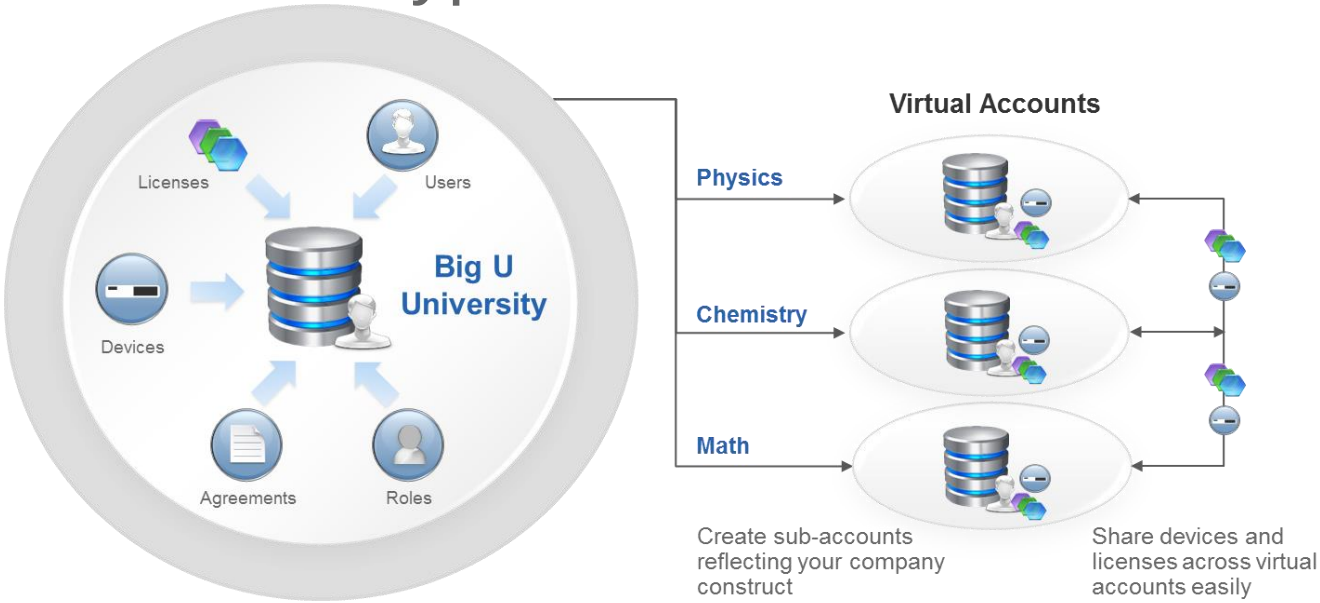
Agenda

1. Overview
2. Cisco Commerce Workspace Demonstration
3. Additional Information

Overview

Smart Account Types



Holding Smart Account

Account where Partners / Distributors can temporarily deposit orders until the end Customer Smart Account is identified. Also provide company-wide access to orders associated with the Holding Account

Who needs this: All Channel Partners

Customer Smart Account

Account where smart account enabled products are deposited. Licenses can be managed by Customer directly, Channel Partner, or authorized party.

Who needs this: All Customers, and Channel Partners purchasing products for their own use

CCW Ordering Scenarios

Customer

Partner

PAK Based Licenses

Smart Account assignment is **optional but recommended** since PAKs will **automatically be available** in LRP and **visible** at the enterprise-wide level.

The best practice is to **assign** the End Customer Smart Account at **the time of order** for the PAKs to be automatically available in LRP. You can assign an end Customer Smart Account up until the order is fulfilled, which is usually 24-48 hours after the order is placed.

Otherwise, PAKs can be assigned to the Smart Account post order in LRP so Customers can benefit from enterprise-wide access control and visibility.

Smart Licenses

Smart Account assignment is **mandatory** to submit the order. The Smart Licenses will be automatically activated and available in SSM.

Detailed Smart Account assignment scenarios will be covered later in this deck, but the initial order can be assigned to either the Customer Smart Account or the Holding Smart Account and re-assigned to the Customer Smart Account post order.

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Cisco Commerce Workspace (CCW)

What's Changing with Smart Accounts in CCW

Follow normal quoting, configuration, and ordering process with 2 main changes:

In CCW Order, all **Smart License products must be assigned to a Smart Account** – either Customer or Holding - to submit the order.

Customer Smart Account Assignment for traditional PAK SKUs is recommended.

Order should be assigned to the End Customer Smart account of the company owning the items, not a Partner Owned Customer Smart Account.

Distributor Callouts

- Smart License enabled products cannot be stocked.

If the initial Smart Account order was assigned to a Holding Smart Account, you need to transfer order from the Holding Account to a Customer Smart Account so the Customer can consume the Smart Licenses.

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Ordering and Assigning Smart Accounts

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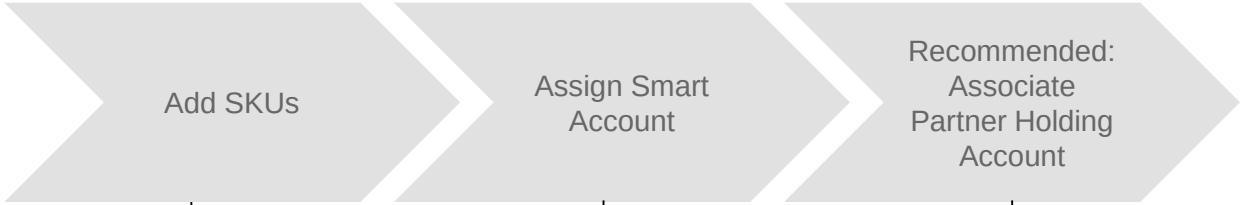
What's Changing: Ordering and Assigning

Here is a look at how the initial ordering of Smart Accounts has changed in CCW:



1. **Smart Account Mandatory SKU (e.g. Smart License):** SA icon indicates to users that it is a Smart Account mandatory product and they are required to assign a smart account to the Order before submitting.
2. **Smart Account Optional SKU (e.g. PAK)**: Assignment to SA is optional

Assign a smart account so that the order can be submitted.

Smart Accounts can optionally be assigned to PAKs for automatic PAK availability in LRP.

Associate a Partner Holding Account with the order so that all users tied to the Partner Holding Account can have enterprise-wide view the order in CCW to serve as a record.

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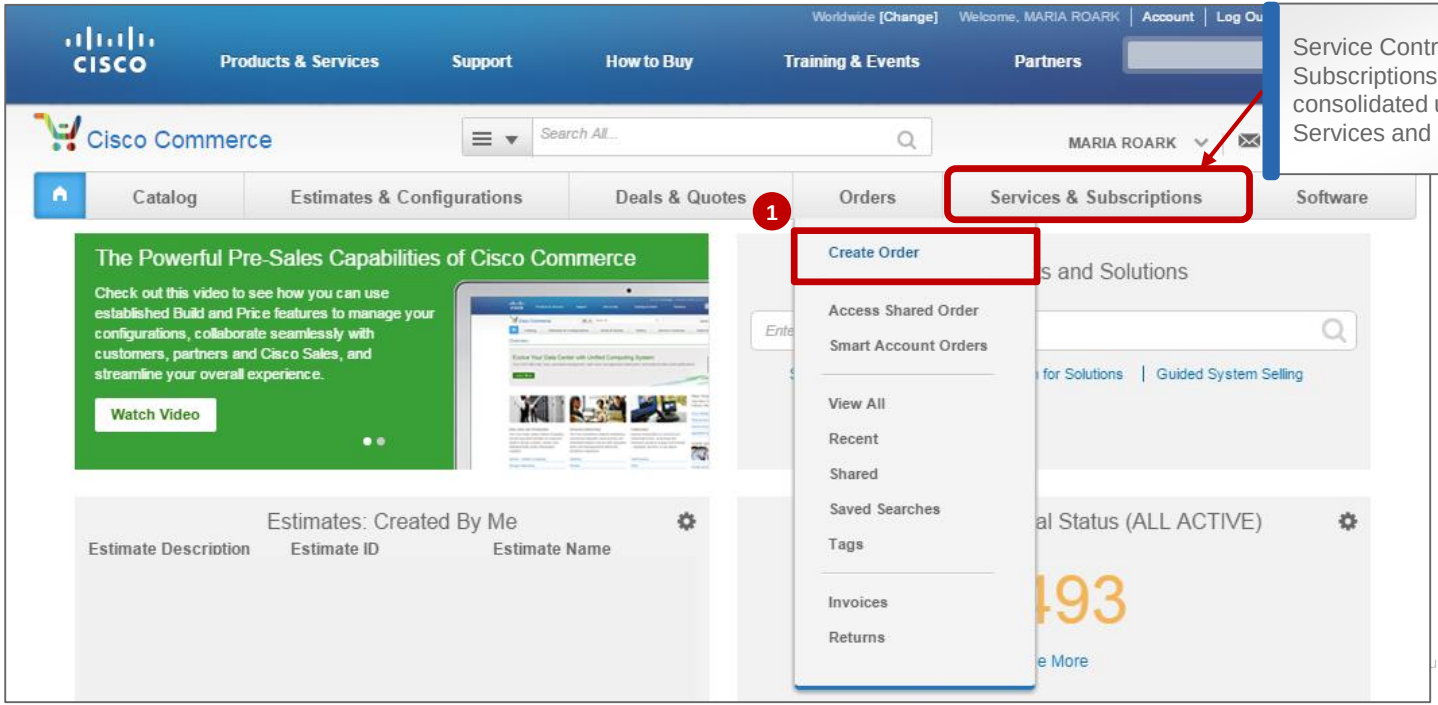
CCW
Getting Started

You can only assign smart accounts in CCW Order.

1. Create standalone order and add a smart account enabled SKU and assign smart account information.
2. Add a smart account enabled SKU in Quote, convert to an order, and assign smart account in Order.

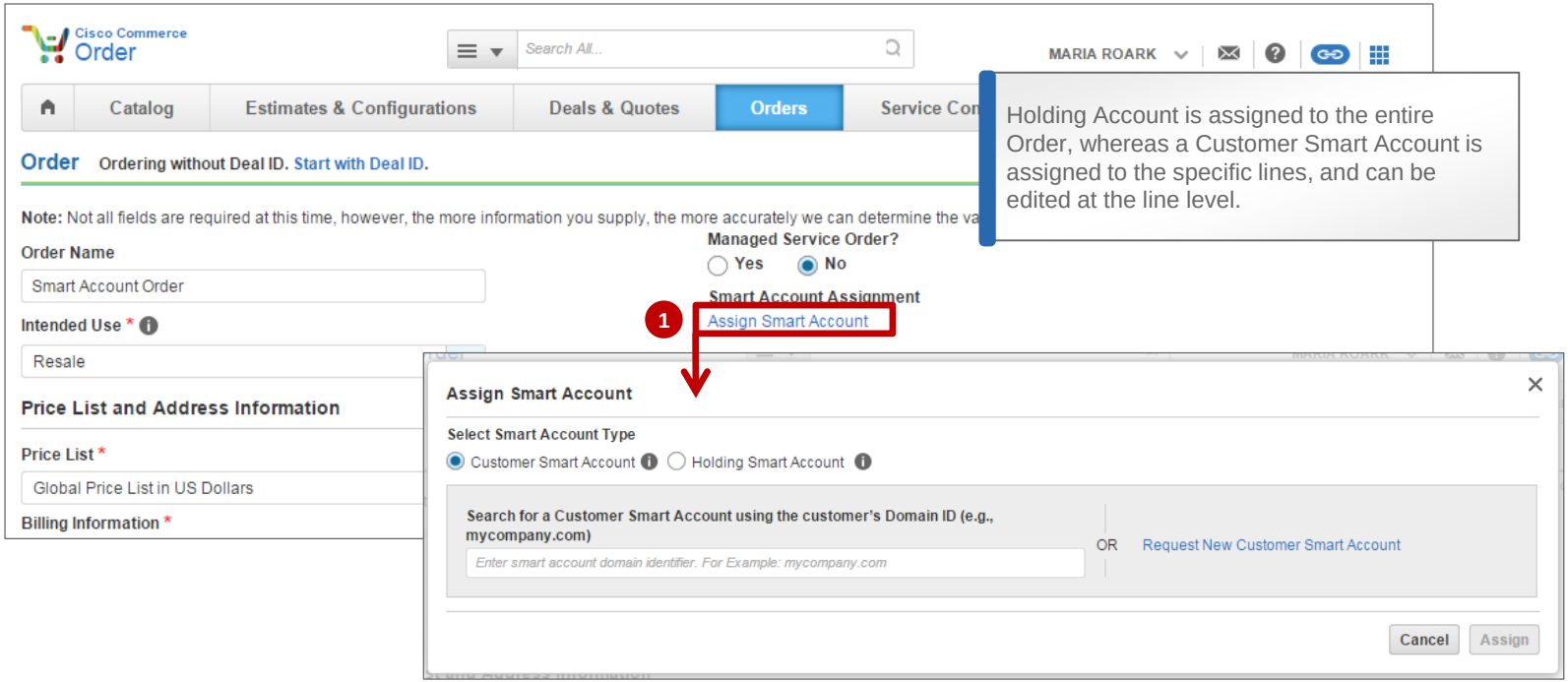


Service Contracts and Subscriptions tabs are now consolidated under one single Services and Subscriptions Tab.

CCW

Getting Started – Upfront Smart Account Assignment

1. On the Order Initiation page, you can assign a Smart Account upfront by clicking **Assign Smart Account**. The assignment will cascade to all licenses on the order, for both Smart Account Mandatory (Smart Licenses) and Smart Account Optional SKUs (Classic PAKs). You can also assign Smart Accounts after you have added items.

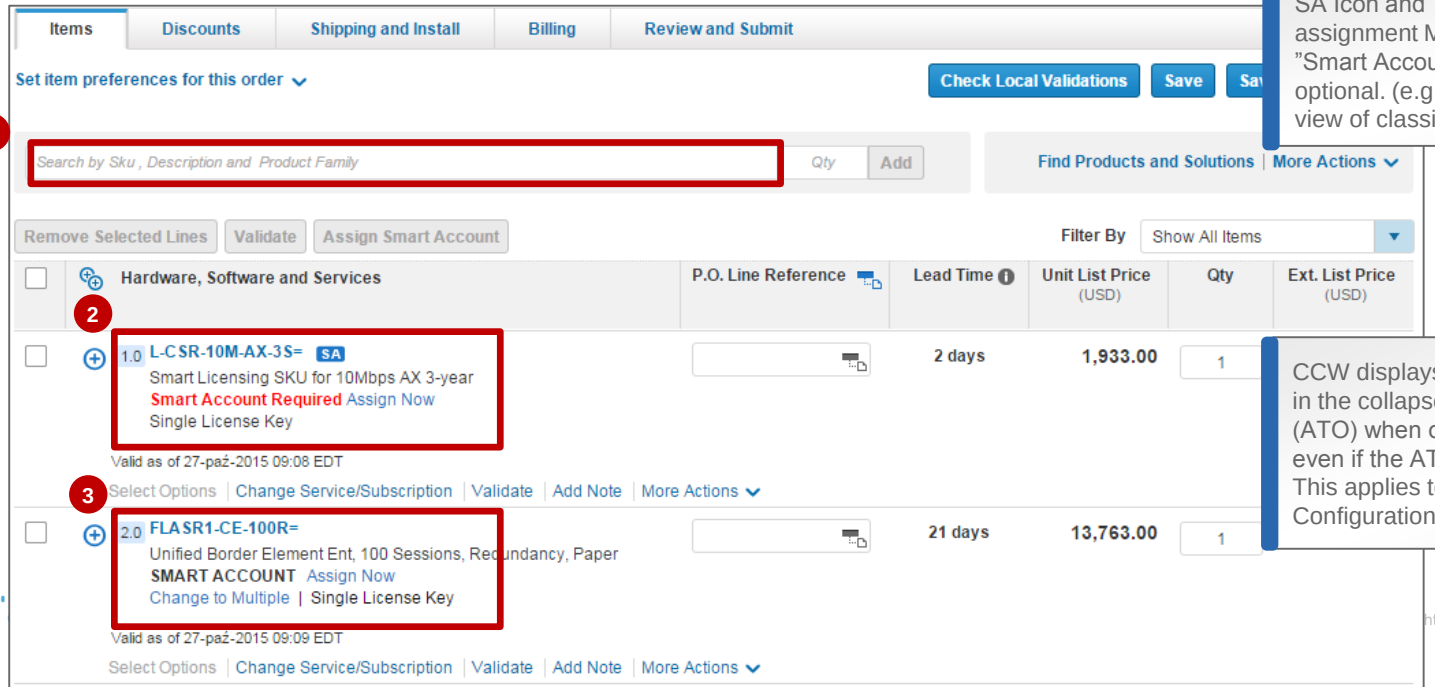


CCW

When is Smart Account Assignment Required

Add Smart SKU → Assign Smart Account → Associate Partner Holding Account

1. Add SKUs through the as-is CCW process.
2. For mandatory Smart License SKUs, the SA icon and Smart Account Required message in red text are displayed. *Smart Account assignment is required to submit the order.*
3. For optional Smart SKUs, Smart Account message is displayed in black text.



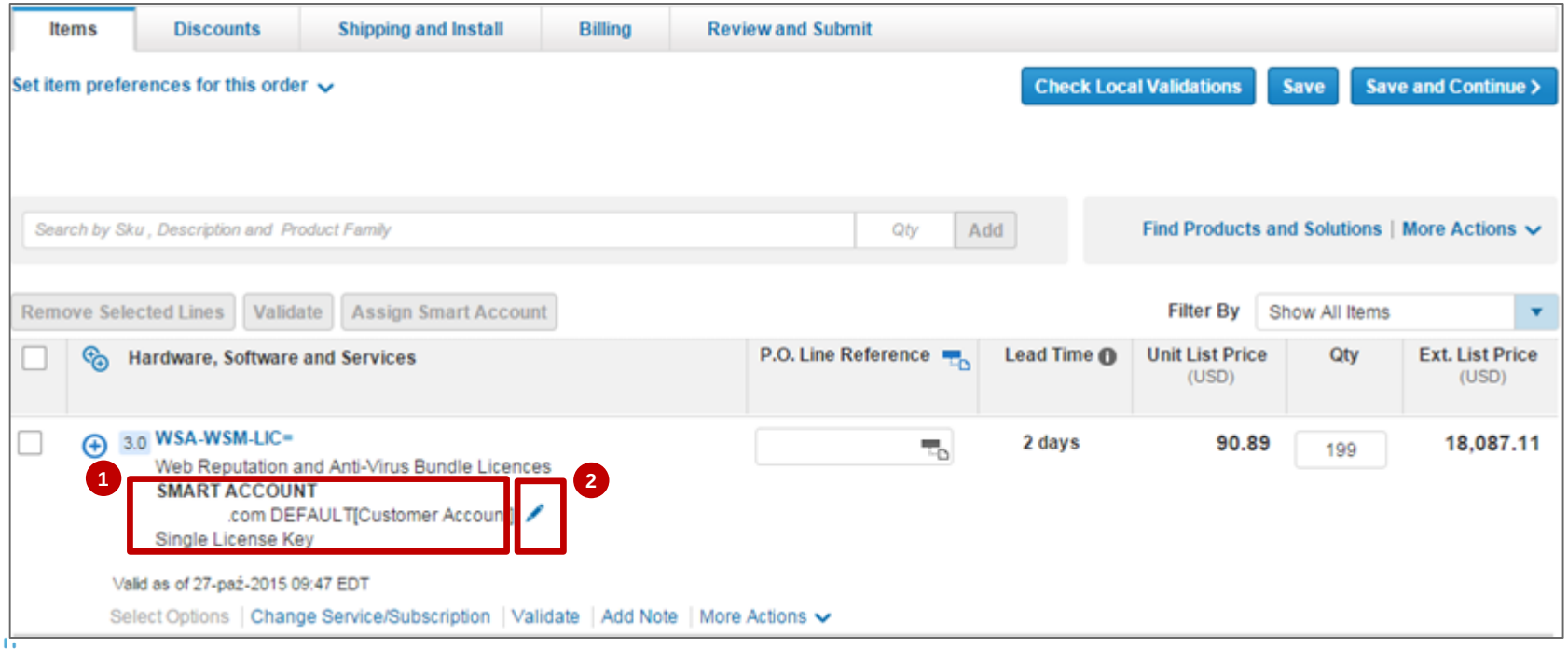
SA Icon and "Smart Account Required": SA assignment Mandatory (Smart Licensing) "Smart Account message" = SA assignment optional. (e.g. PAKs). Provides more holistic view of classic PAK licenses in LRP.

CCW displays the Smart Account Icon SA in the collapsed view of an Assemble To Order (ATO) when one of the minors is "Mandatory," even if the ATO itself is not "Mandatory". This applies to Order, Quote and Configuration.

CCW

View Smart Account Name and edit Smart Account (Items tab)

1. For SKUs already assigned to a Smart Account, the name of the Smart Account is displayed in black.
2. You can click the ✎ icon to edit/ change Smart Account.



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CCW
Assign Order to Smart Account: Partners

Add Smart SKU → **Assign Smart Account** → Associate Partner Holding Account

End Customer is Known

Search for Customer domain (e.g. cisco.com) or Smart Account name when assigning SA in CCW

- SA found → Assign to existing Customer Smart Account
- OR
- No SA found → Request Customer Smart Account on Customer's behalf from CCW

End Customer / Smart Account Information Unknown

Assign order to your Holding Smart Account temporarily in CCW (existing Account or initiate request) → Identify End Customer and / or help Customer setup account → Move order from your Holding Account to Customer Smart Account in CCW

Smart Licensing SKUs Only

Distributors will generally move the order from their own Holding Account to the Resellers' Holding Account; Reseller will then move to Customer Smart Account

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CCW

Assign Order to Smart Account: Distributors & Resellers

Customer

Reseller

Smart Licensing SKUs Only

	Distributors	Distributor / Resellers	Resellers
Distributor Works Primarily with Reseller Partner	Search for Reseller domain (e.g. cisco.com) or Smart Account name when assigning SA in CCW	SA found / OR / No SA found: Assign to Reseller's existing Holding Smart Account; Request Holding Smart Account on Reseller's behalf from CCW	Reseller will move order to Customer Smart Account in CCW — SA found / OR: Assign to existing Customer Smart Account; No SA found: Request Customer Smart Account on Customer's behalf
Distributor has Relationship with End Customer	Search for Customer domain (e.g. cisco.com) or Smart Account Name when assigning SA in CCW	SA found / OR: Assign to existing Customer Smart Account; No SA found: Request Customer Smart Account on Customer's behalf from CCW	
Reseller /Customer Information Unknown or Uncertain	Assign order to Distributor Holding Smart Account temporarily in CCW	Move order from Distributor Holding Account to Reseller Holding Account or Customer Smart Account in CCW	Reseller will move order to Customer Smart Account in CCW

Customer Visibility to Distributors
Assigning the order to the Reseller's Holding Account instead of directly to the Customer Smart Account allows the reseller to limit visibility of the end Customer to the Distributor

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CCW
Assign Order to Smart Account: Service Providers

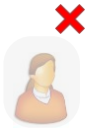
As a Service Provider it is recommended to assign your own Customer Smart Account to CCW orders and, subsequently, reassign the licenses to Virtual Accounts in SSM.

You may want to create one Virtual Account for each of your End Customers within your Customer Smart Account. At this time, having more than 50 Virtual Accounts per Smart Account is not recommended so subdividing Virtual Accounts by Region may be a better option. Each End Customer can be a Virtual Account Administrator for their Virtual Account if your service model requires it.

End Customer is Known

→ Assign the licenses to the Service Provider Customer Smart Account (CCW)

→ Transfer the licenses to the End Customer Virtual Account (within the Service Provider Customer Smart Account) (SSM)



End Customer / Virtual Smart Account Unknown

→ Assign the licenses to the Service Provider Customer Smart Account (CCW)

→ The licenses can be placed in a temporary Virtual Account within the Service Provider Customer Smart Account if desired (SSM)

→ Once End Customer is known, create the End Customer Virtual Account within the SP Customer Smart Account (SSM)

→ Transfer the licenses to End Customer Virtual Account (within the Service Provider Customer Smart Account) (SSM)

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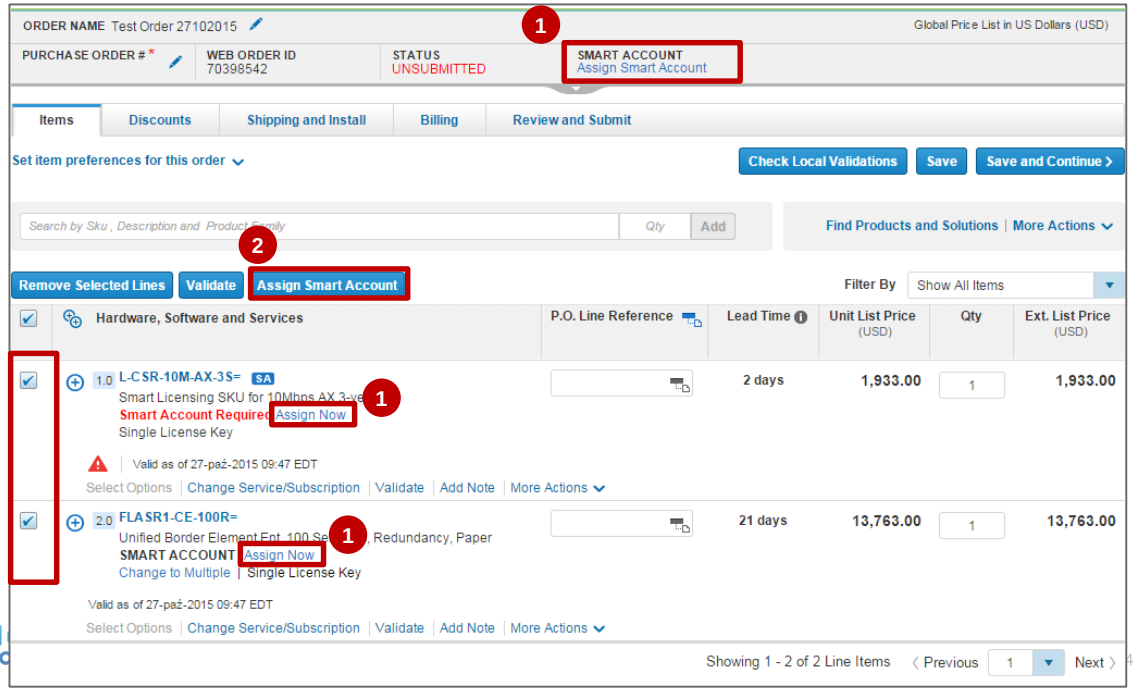
CCW
Assigning Smart Account in Order

1. Assign Smart Accounts at header or line level. Holding Accounts can only be assigned at header level to the entire order.
2. You can also select certain lines and assign a Customer Smart Account to all selected items.



Only one Holding Account can be assigned to an order, but different Customer Smart Accounts OR Customer Smart Account Virtual Accounts can be assigned to each line.

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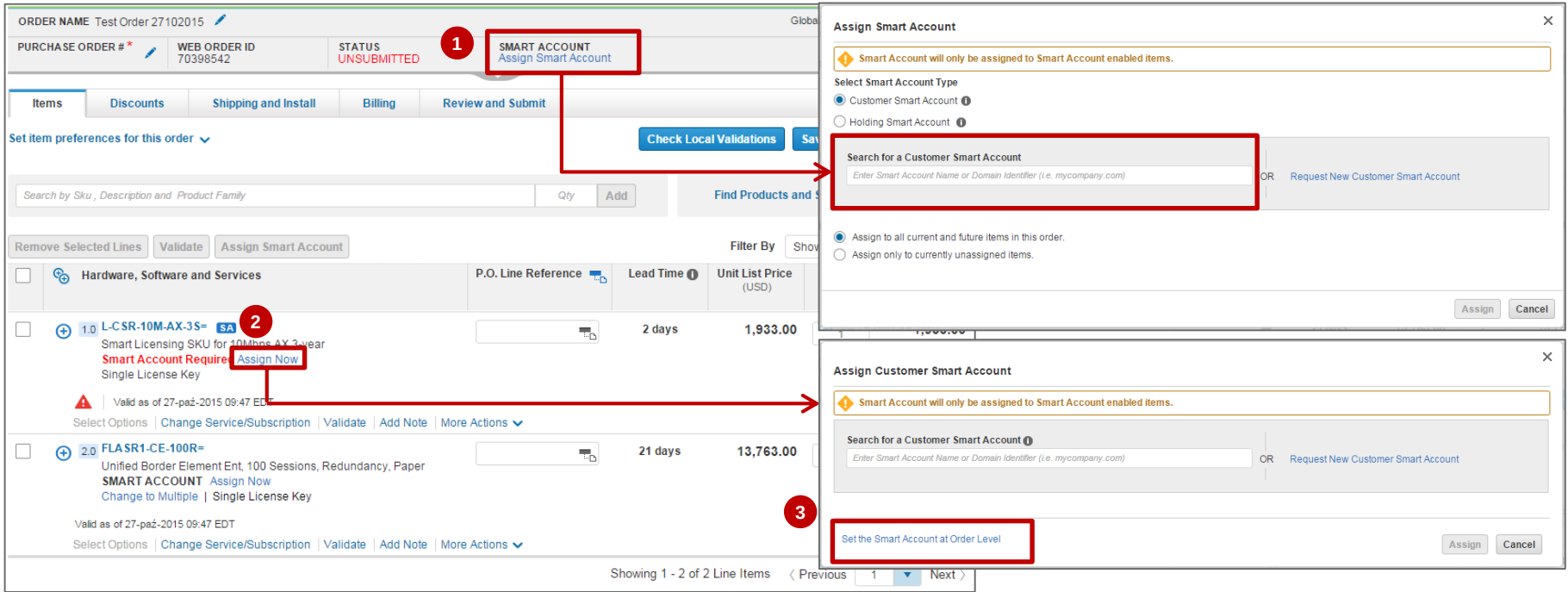
CCW
Assigning Smart Account in Order

Add Smart SKU | **Assign Smart Account** | Associate Partner Holding Account

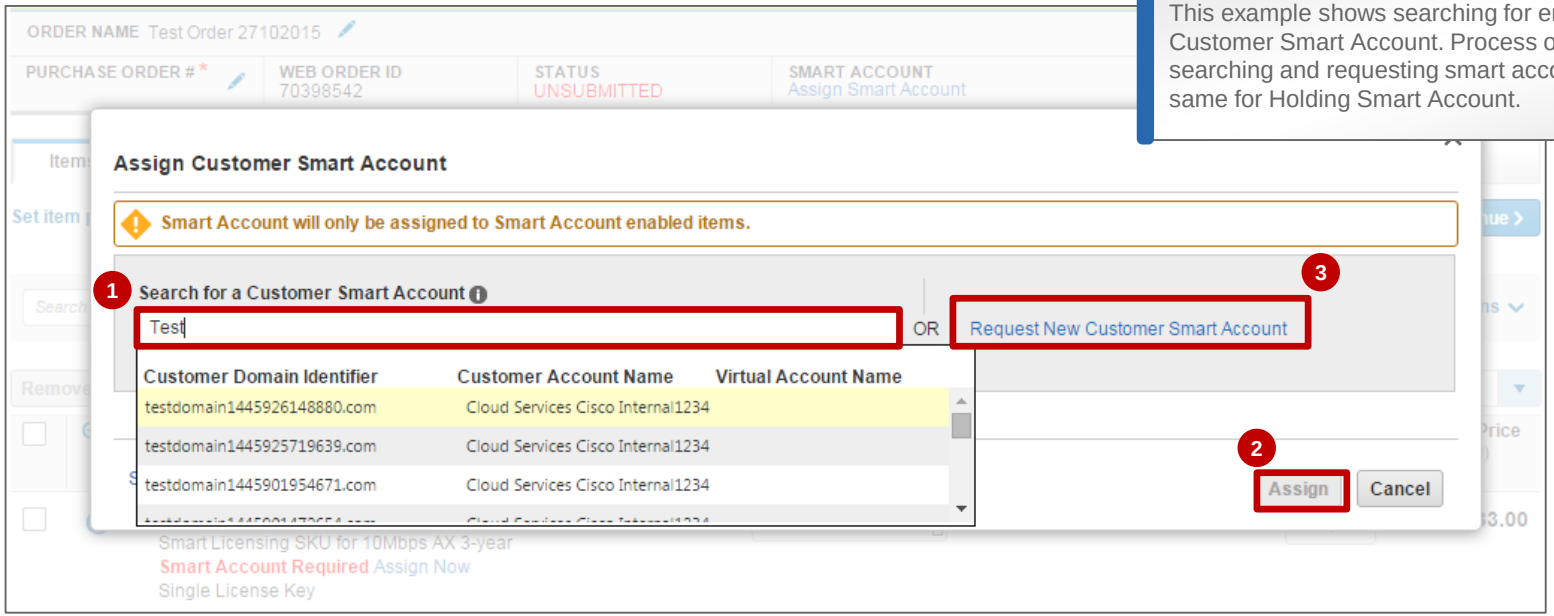
Search is available by Domain ID and Smart Account Name anywhere users search for Smart Accounts.

1. From Header, click ”Assign Smart Account”, select account type (Holding or Customer) and search.
2. From Line, click ”Assign Now” and search.
3. Additionally, at Line level there is a link to Set the Smart Account at the Order Level.



CCW
Assigning Smart Account in Order – Search

1. Search using the End Customer Domain ID or Smart Account Name. Results auto-populate.
2. If you find the correct account, click **Assign**.
3. If you cannot find the correct Customer Smart Account, and know the Customer information, click **Request New Customer Smart Account**.



This example shows searching for end Customer Smart Account. Process of searching and requesting smart account is the same for Holding Smart Account.

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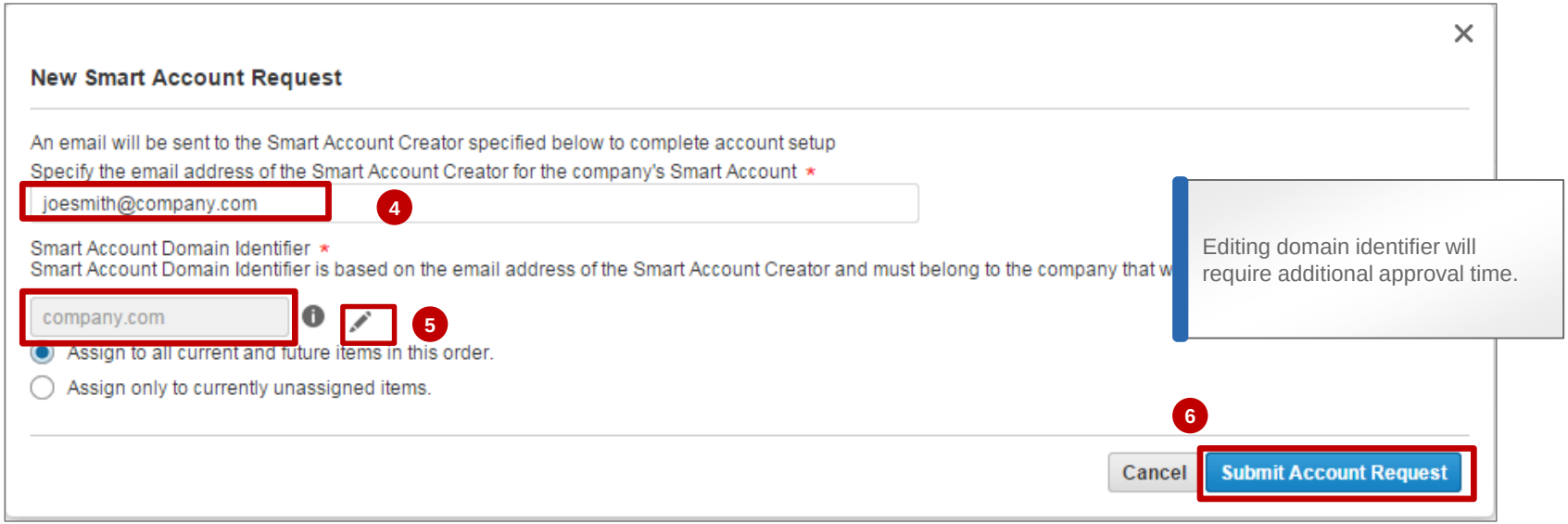
CCW
Submit Smart Account Request

4. Enter the Creator's email address. This must be someone associated with the Customer company.
5. Domain is defaulted from the Creator email. To edit the Account Domain Identifier, click Pencil icon.
6. Click **Submit Account Request**. This account will now be assigned to the order, and you can submit the order.



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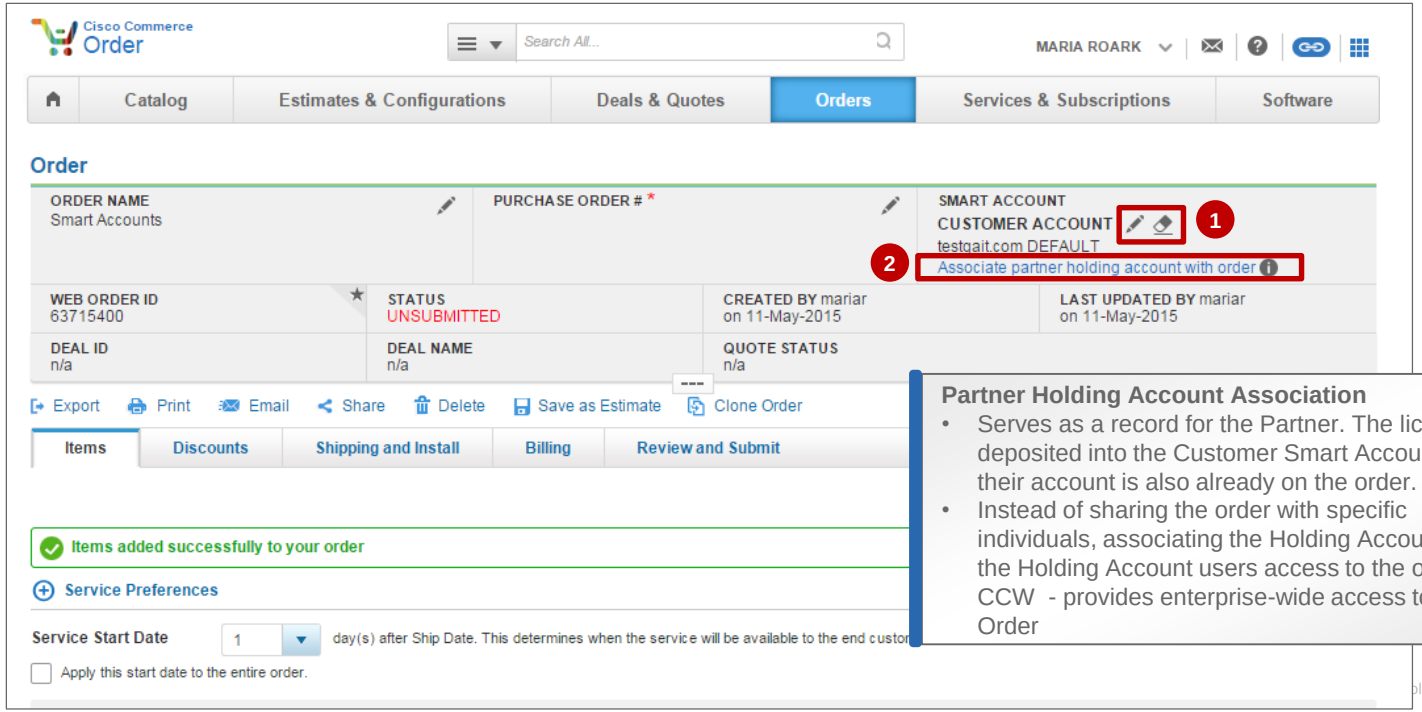
CCW
Associating Partner Holding Account

1. Smart Account assignment now display. Click Pencil icon to edit, or Eraser to delete.
2. (Optional) At header level, associate Partner Holding Account by clicking **Associate Partner Holding Account with Order**.



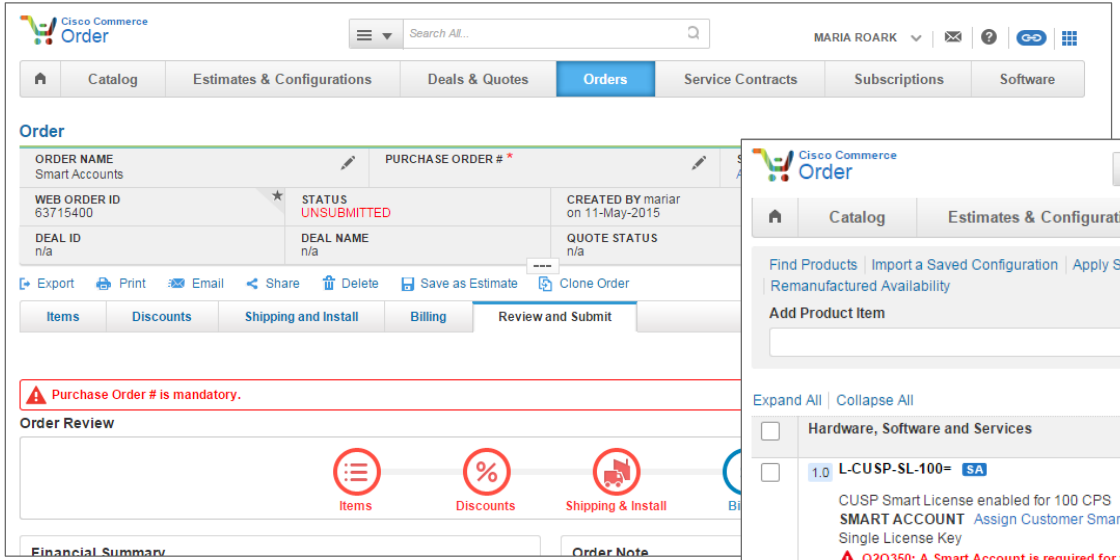
Partner Holding Account Association

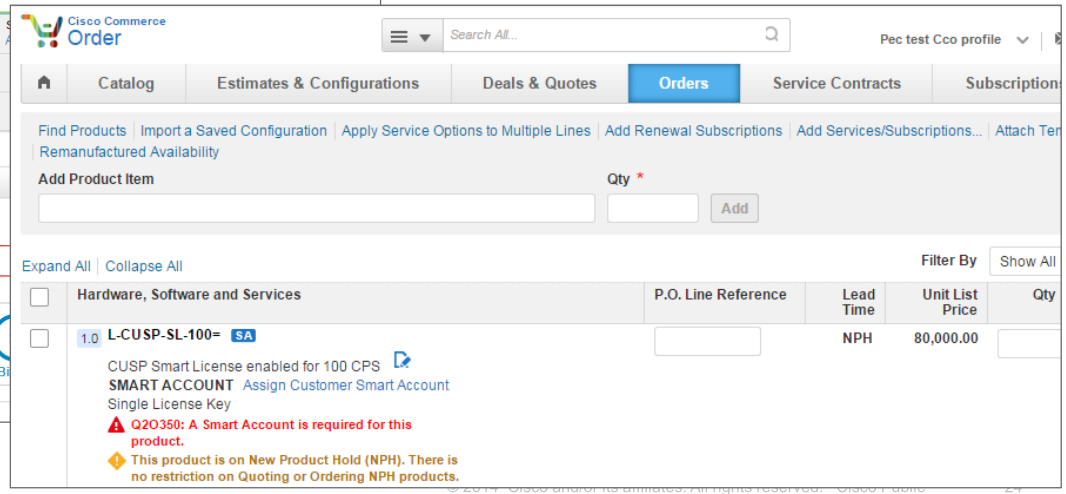
- Serves as a record for the Partner. The licenses are deposited into the Customer Smart Account, since their account is also already on the order.
- Instead of sharing the order with specific individuals, associating the Holding Account allows the Holding Account users access to the order in CCW - provides enterprise-wide access to the Order

CCW
Submit Order

Add Smart SKU → Assign Smart Account → Associate Partner Holding Account

1. Once you have assigned an existing Smart Account or requested one (Customer or Holding), you will be able to submit the order with Smart Account Mandatory SKUs/Smart Licenses.
2. If you have a Smart Account Mandatory item, and haven't selected a Smart Account, then you will receive error messages informing you to assign a SA.





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CCW

When are Licenses Available in Smart Accounts?

Assuming the order was placed successfully without any holds and the Smart Accounts have been created:

Assigned to Holding Account

In order booked status and onward:

- Order will show up in the Partner Holding Account shortly after the Order gets into Booked status, and you can re-assign to Customer Smart Account for Smart Licenses.
- For Smart Account Optional orders you can assign a Smart Account up until the order is fulfilled, otherwise assign to Smart Account in LRP

.

Assigned to End Customer Smart Account

In order shipped status:

- Licenses will show up in the End Customer Smart Account 24-48 hours after the Order had moved into Shipped status

If the order was assigned to an incorrect Customer Smart Account, raise a case with Cisco to modify SA assignment

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Changing Assignment from Partner Holding Smart Account to Customer Smart Account

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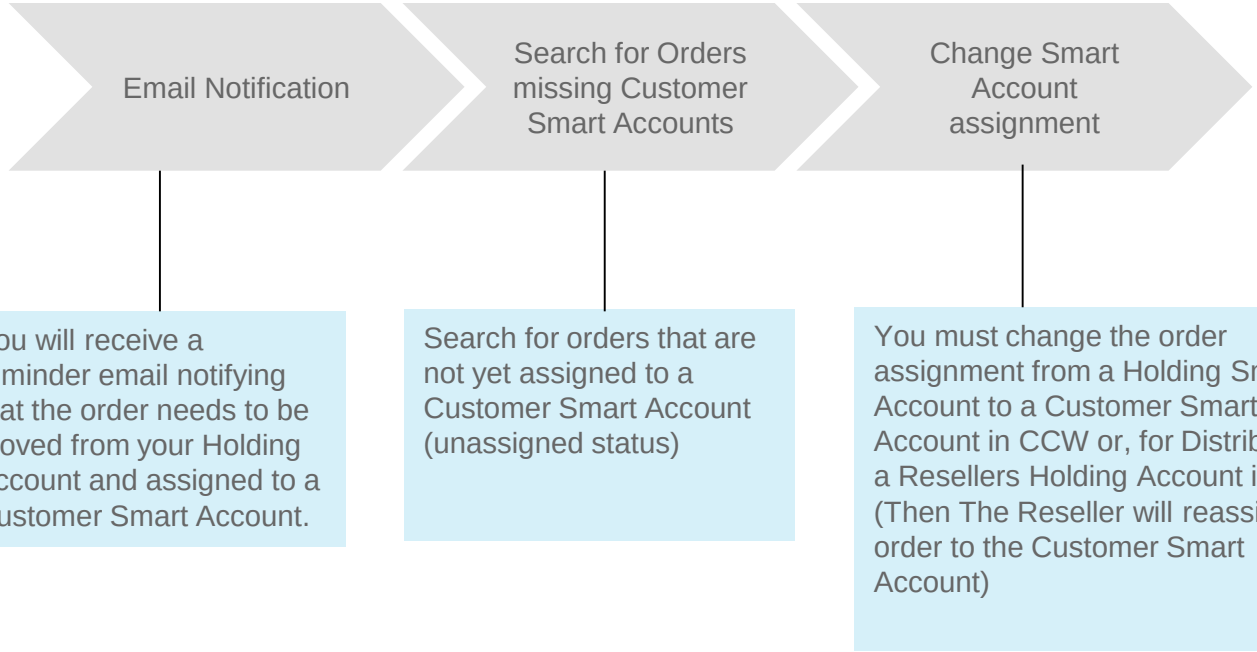
What's Changing: Re-Assigning Smart Accounts

How to assign an order from the Partner Holding Account to the End Customer's Customer Smart Account post order, so the Customers can consume their licenses:

Note: This process is primarily for Smart Account Mandatory Orders (i.e. Smart Licenses.

If classic PAKs (Smart Account Optional) SKUs are assigned initially to the Holding Account they need to be moved to the Customer Smart Account the same day as placing the order



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CCW
Email Notification

If a Holding Account is assigned, you will receive a notification upon order submission informing you that a Customer smart account assignment is required (for Smart Licenses only). Email preferences are set in CSC.

Notification Recipients
- Whoever normally receives CCW notifications
- Order Manager for Holding Accounts

Customer Smart Account Assignment Pending

Dear Subscriber,

The following order requires Smart Account Assignment:
https://apps.cisco.com/lcw/pdrqp/reg.order?orderId=1849770

ORDER INFORMATION

Purchase Order Number:	34567890	Order Name:	Network Upgrade
Sales Order #:	54195394	Web Order ID:	64938731_HOSTO_CISCO2000
Holding Account:	BigU.edu	Virtual Account:	Physics Department
Order Submission Date :	03-Jun-14	Customer Reference	abc_cust_ref

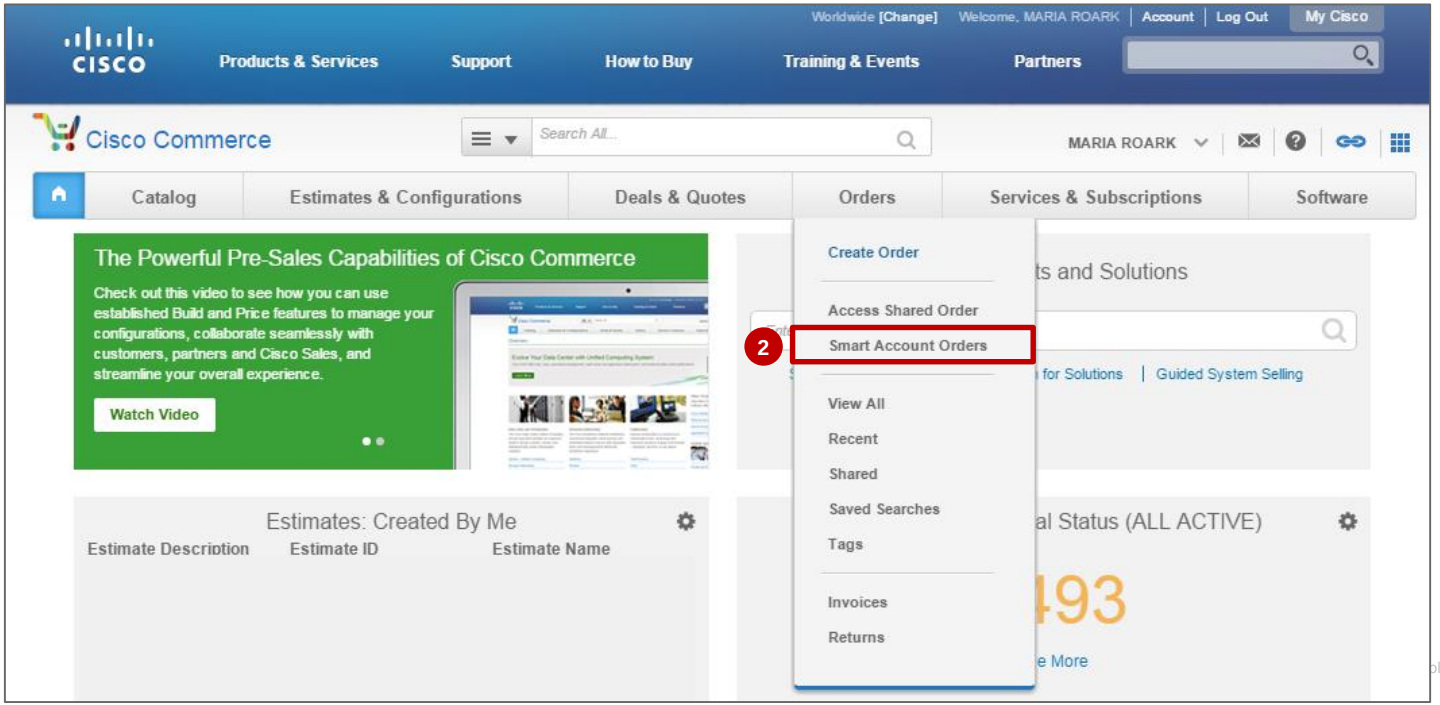
This order has been assigned to a Holding Smart Account. The customer cannot use products on this order until they are assigned to a Customer Smart Account.

Additional information about Smart Accounts can be found at
http://www.cisco.com/c/en/us/products/abt_sw.html

Thank you,
CISCO SYSTEMS, INC.
www.cisco.com
Cisco Systems, Inc is registered in California, USA (Company Number 1183477) with its registered office at 170 West Tasman Drive, San Jose, CA 95134

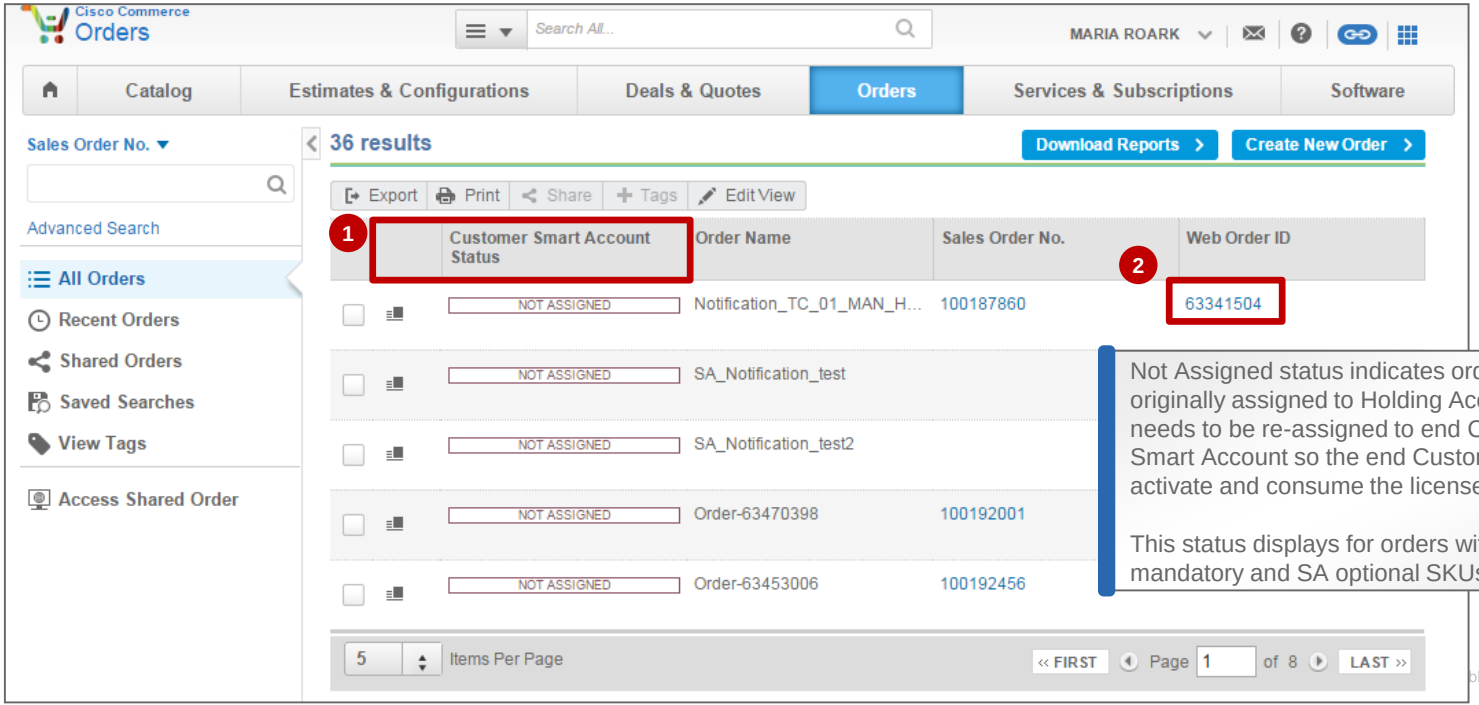
CCW
Search for Smart Account Orders

1. To reassign an order from a Holding Smart Account to a Customer Smart Account or to a different Holding Smart Account, search for the order.
2. Under Orders, click **Smart Account Orders**.



CCW
Filter Smart Account Assignment Status

1. All Orders with Smart Accounts Display. Click the Customer Smart Account Status column to filter the Not Assigned orders to the top.
2. Click the **Web Order ID** to assign a Customer Smart Account to that order.

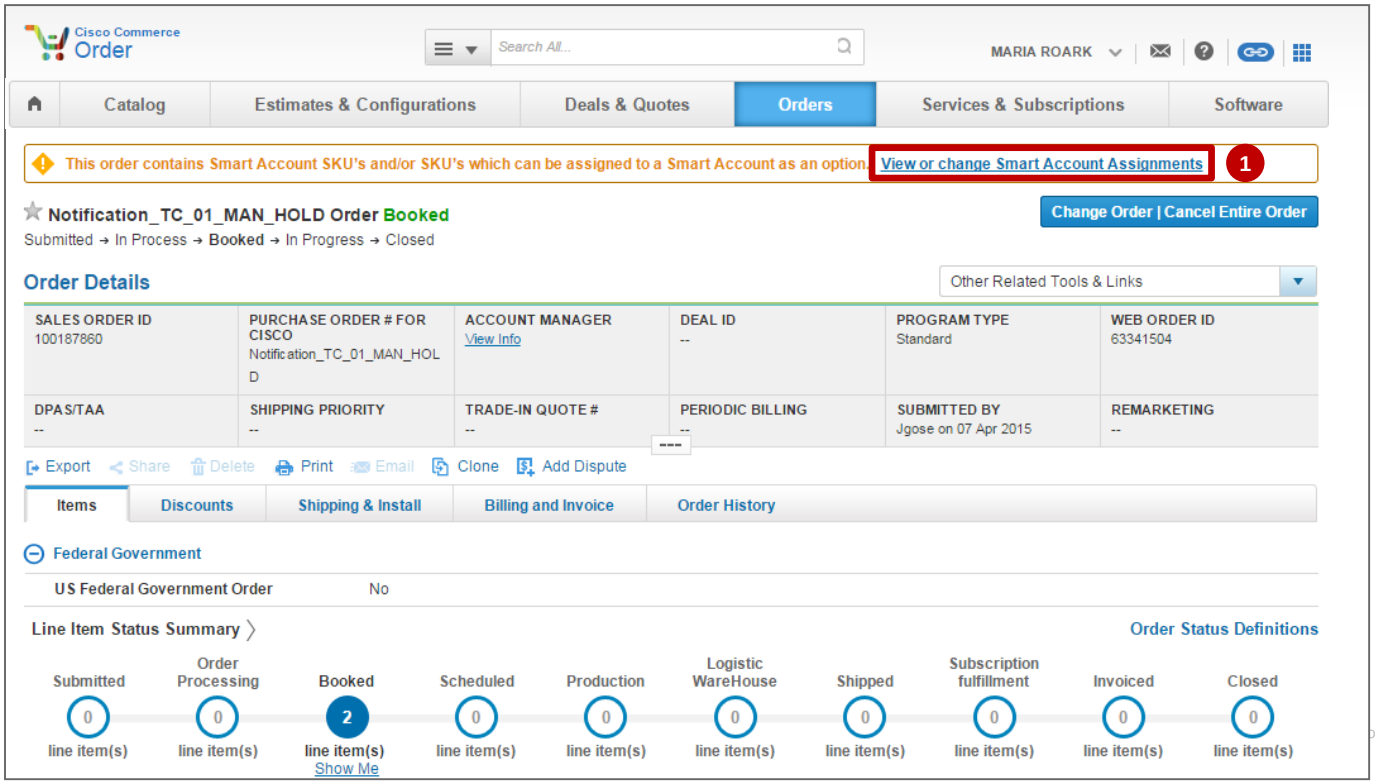


Not Assigned status indicates order was originally assigned to Holding Account and needs to be re-assigned to end Customer Smart Account so the end Customer can activate and consume the licenses.

This status displays for orders with both SA mandatory and SA optional SKUs

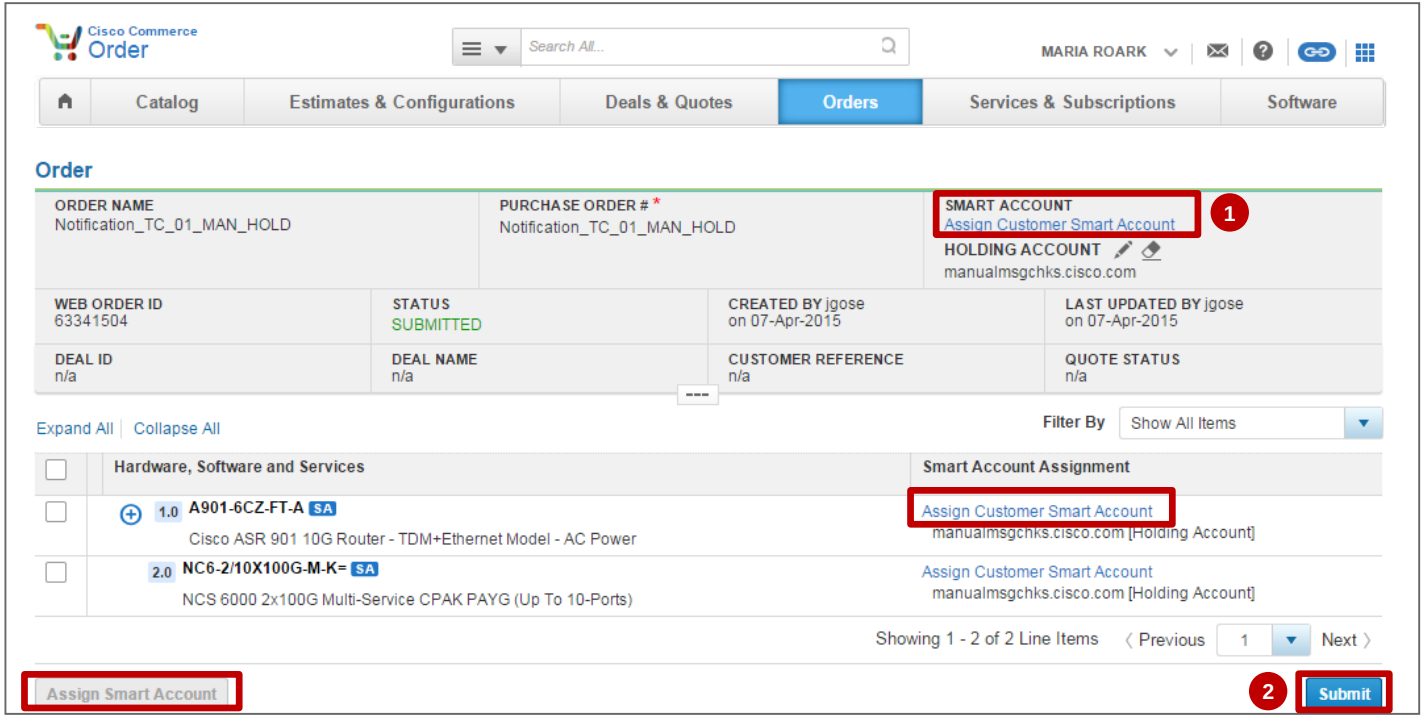
CCW
Change Smart Account Assignment

1. In the header level message, click **View or change Smart Account Assignments** to change the Smart Account assignment.



CCW
Change Smart Account Assignment

1. Following the same process as the initial SA assignment, click **Assign Customer Smart Account** from the header or line level.
2. Click **Submit**.



CCW
Smart License Delivery Email

1. For Smart License enabled products, the provisioning is not completed through the standard eDelivery process. In the email received, Customer will need to click **To View Your Smart Licenses.** This will take them to SSM, where they will view licenses and register them to a device.
   - If the licenses are Classic / PAK licenses, it will say **Register Claim Certificates (PAKs)** instead and those will be accessible in LRP through the as-is process today or automatically available in LRP if assigned to a Smart Account in CCW.

eDelivery Access Order

Line Id	Product ID (SKU)	Description	Qty	Carton/Cust Ref Line Notes	
912345678	L-ASAV10S-K9=	ASAv10 (eDelivery)	1	PO# 123456	1 To View Your Smart Licenses
923456789	L-ASAV10S-STD	ASAv10 with Standard Tier licenses (eDelivery)	1		

eDelivery Access Order

- eDelivery Access Order: Access and download all the order content including software, licenses, documentation, additional items and instructions via eDelivery.
- To View Your Smart Licenses: Access your Smart Account to view licenses and registered devices in your Smart Network.

Please note that all email recipients may not be able to access the "To View Your Smart Licenses" link. If you have any access issues, please contact smart-licensing-eft-tracking@cisco.com.

Note: PAKs will continue to be fulfilled through the selected option – physical or eDelivery.

If they were assigned to a Customer Smart Account from CCW, they will be automatically available in LRP. If they weren't, then they will be registered and managed in LRP following the as-is process.

Smart Account Transaction Traceability

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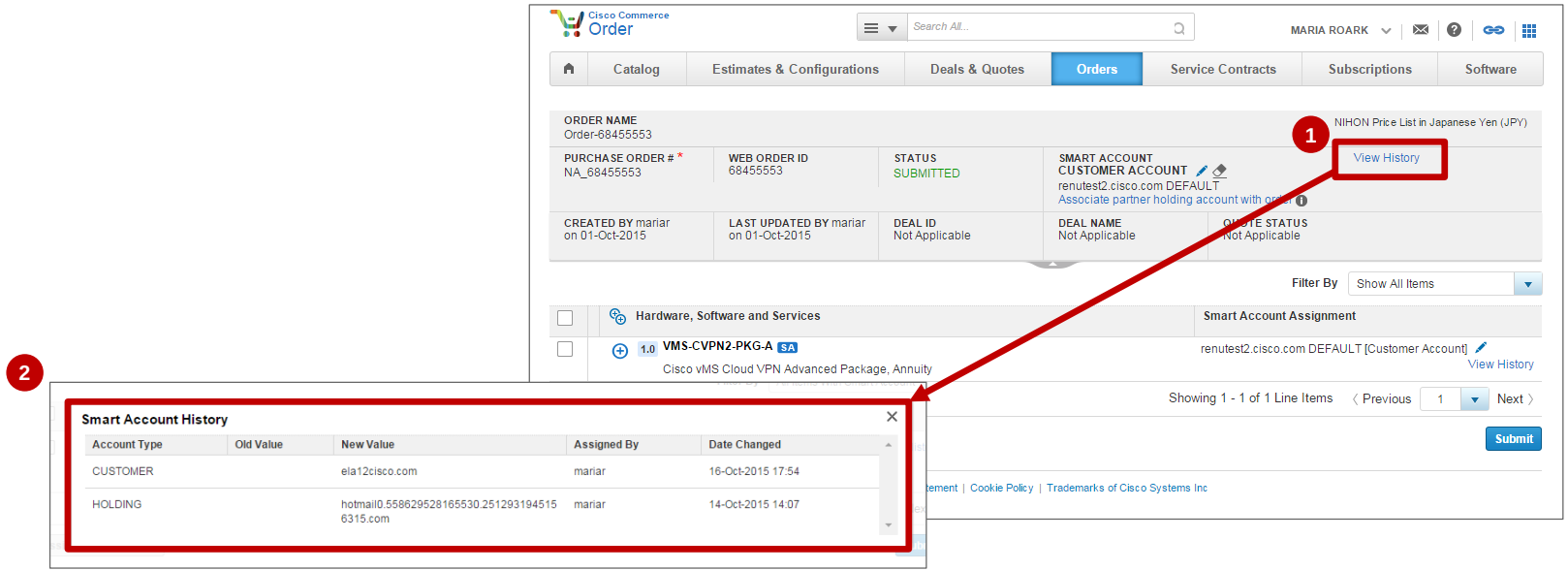
Smart Account Transaction Traceability

View History

You can now view Smart Account transactions in the post-sale assignment page via a new “View History” link at the header and line levels.

1. Click **View History** at the Header level.
2. You can access Smart Account Historical details for both Customer and Holding Accounts.



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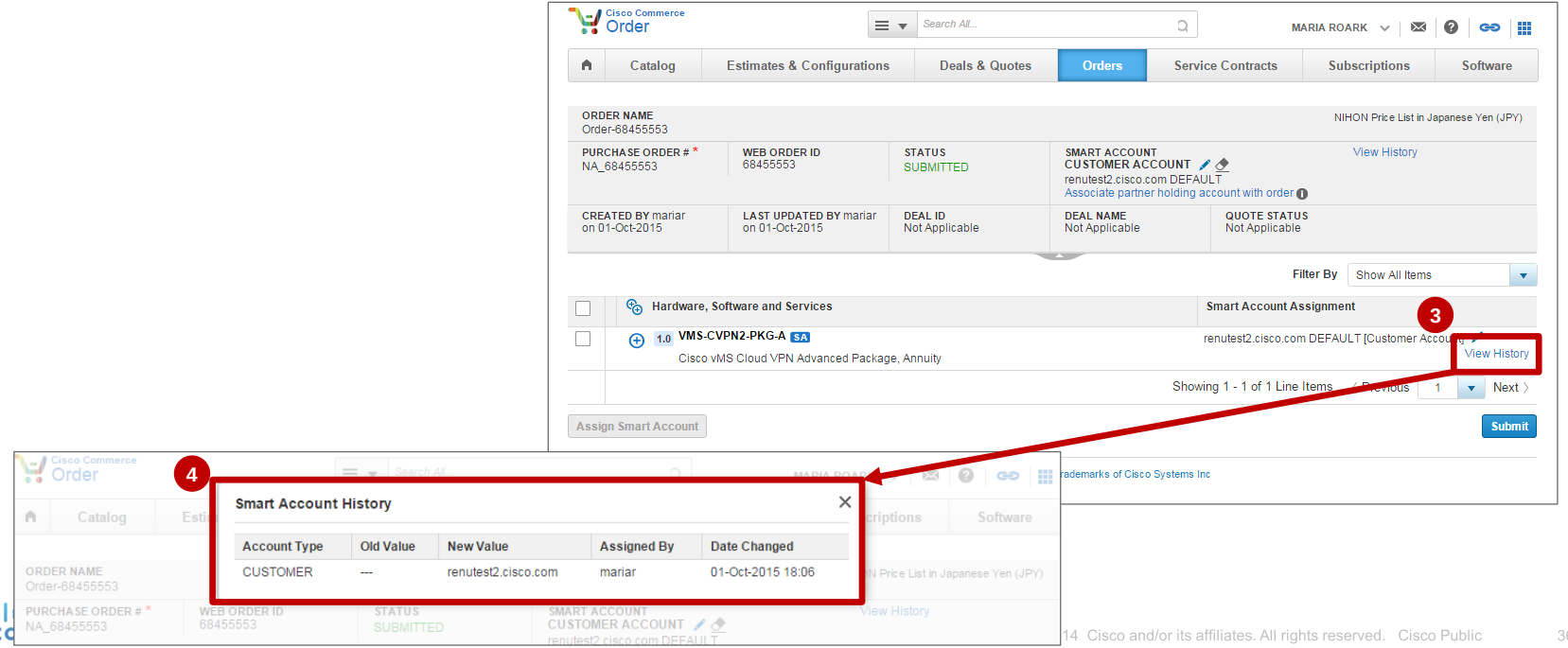
Smart Account Transaction Traceability

View History

Smart Account Historical details are available also at the line level.

3. Click **View History** at the Line Level.
4. View Historical Information.



Visibility in CCW for Smart Orders originating from SOWB (Sales Order Work Bench)

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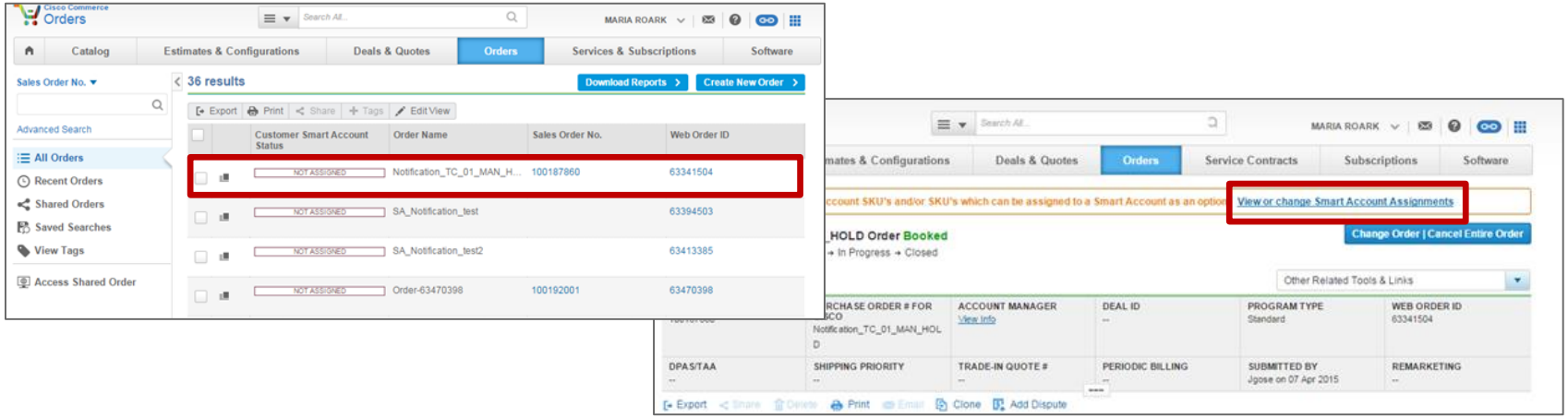
View Smart Orders originating from SOWB

Sales Order Work Bench orders with Smart Accounts

Orders created manually by Cisco Support requiring Smart Accounts must be assigned a Smart Account in CCW. Users can search, initially assign and edit Smart Account information with existing processes from within CCW for all manually created orders.



As with other CCW created orders, notifications are be sent to Holding Account Users of manually created orders pending Customer Smart Account assignment.

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Additional Information

Cisco Commerce Workspace (CCW)

Export Compliance Considerations

- A small segment of government and military entities located in countries outside the EU License-Free zone will be unable to activate export controlled features in Smart-enabled products due to export compliance issues.
- Manual business processes are in place to identify Customers in restricted countries and then to review their orders to ensure that non-approved products are not included. If non-approved products are found, Customers will be redirected to substitute traditionally-licensed products with similar functionality.

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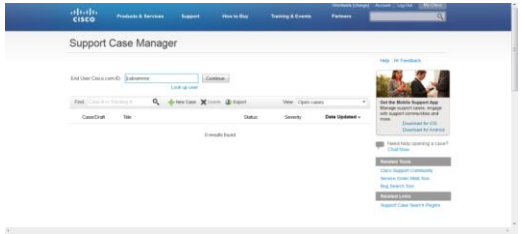
Customer Support
Submitting Cases

Software Licensing Support

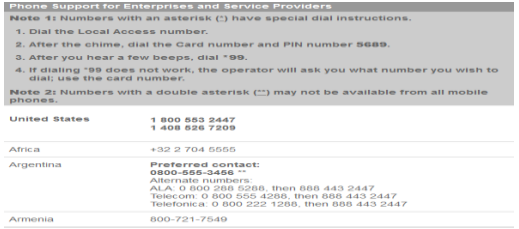
- Customers with Software Licensing issues/questions can open a case using standard Cisco processes:



Online

Licensing@cisco.com
Smart-support-team@cisco.com

Email



Phone

- **Software Licensing Support Hours**

  Monday – Friday: 8:00 am – 5:00 pm (US PT)

Product Support

- Technical Assistance Center (TAC)

  Customers can contact TAC for product support issues & questions using existing Cisco processes

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Any Questions

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Additional Resources for Channel Partners

Location	Audience	Description
http://cisco.com/go/smartaccounts	All	Cisco Smart Accounts Overview
http://cisco.com/go/smartlicensing	All	Cisco Smart Software Licensing Overview
Software Operation Exchange Page Training Schedule Orderable Smart Licensing SKU List FAQ	All	Additional Software training and informational resources
Module 1: Overview and Smart Accounts in CSC	Partner/ Distributor/ B2B	Partner overview of Smart Accounts and Smart Licensing and step-by-step guide on how to create and manage Holding Smart Accounts in Cisco Software Central (CSC)
Module 2: Purchasing and Assigning Smart Accounts in CCW	Partner/ Distributor	Step-by-step guide of how to order Smart Licensing products and assign Smart Accounts to Licenses in CCW for Partners and Distributors
Module 3: License Management with Smart Accounts	Partner/ Distributor/ B2B	Step-by-step guide on how to manage licenses assigned to a Smart Accounts. PAK based licenses are managed in LRP and Smart Licenses are managed in SSM.
Smart Accounts and Smart Licensing for End Customers	End Customer	A step-by-step guide that will assist your end customers with creating and managing Smart Licenses and PAK licenses with Smart Accounts.
Request Holding Smart Account Quick Reference Guide Complete Holding Smart Account Setup Quick Reference Guide	Partner/ Distributor/ B2B	Quick step-by-step guide on how to initiate a request for a Holding Smart Account Quick step-by-step guide on how to complete the setup for a Holding Smart Account
Request Customer Smart Account Quick Reference Guide Complete Customer Smart Account Setup Quick Reference Guide	Partner/ Distributor/ B2B/ End Customer	Quick step-by-step guide on how to initiate a request for a Customer Smart Account Quick step-by-step guide on how to complete the setup for a Customer Smart Account
Assist a Customer with Smart Account Set Up Quick Reference Guide	Partner/ Distributor/ B2B	Quick step-by-step guide on how a Partner can assist a Customer with setting up a Smart Account
Assign a Partner to Manage Account on your Behalf Quick Reference Guide	Partner/ Distributor/ B2B/ End Customer	Quick step-by-step guide on how a customer can assign a partner to manage their Smart Account
Your Smart Account is Here!	Partner/ Distributor/ B2B	Email template for distributors and partners to introduce their customer's new Smart Account and provide next steps to complete the setup.

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CISCO
TOMORROW starts here.

Version History

Slide #	Details	Release
12	Services and Subscriptions Toolbar Update (comment) and updated screenshot	Q2FY16
14	New messages will display for Smart SKUs on the order capture page of CCW that are in addition to the existing “SA” icon	Q2FY16
15	Added slide 15 to show how to View Smart Account Name and edit Smart Account (Items tab)	Q2FY16
16-17	Added info that Smart account can be searched by Domain ID or Smart Account Name	Q2FY16
18	Added slide on Smart accounts process for Service Providers	Request
19	Changed screenshots according to the new User Interface layout	Q2FY16
20-21	Screenshots and text updated (Smart Licensing enhancements)	Q2FY16
29-32	Added the new toolbar with Services & Subscriptions	Q2FY16
34-36	Added three slides for „View History”	Q2FY16
37-38	Visibility in CCW for Smart Orders originating from SOWB (Sales Order Work Bench)	Q2FY16
43	Additional Resources for Channel Partners	

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