



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	<ul style="list-style-type: none">All	Cisco Software Central (CSC)
Module 2: Order and Assign Smart Products	1 hour	<ul style="list-style-type: none">Person placing ordersPerson assigning order from Holding Account to Customer Smart Account	Cisco Commerce Workspace (CCW)
Module 3: License Management	1 hour	<ul style="list-style-type: none">Software license and purchasing approverLicense administration and management	Smart Software Manager (SSM) & License Registration Tool (LRP)

A person with dark hair, wearing a grey jacket and a backpack, is seen from the back, looking through a blue telescope. The background shows a cityscape across a river, with a bridge and several buildings under a bright sky. The scene is captured in a cinematic style with soft lighting.

Learn how to:

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

Agenda

1 Overview

2 Cisco Commerce Workspace Demonstration

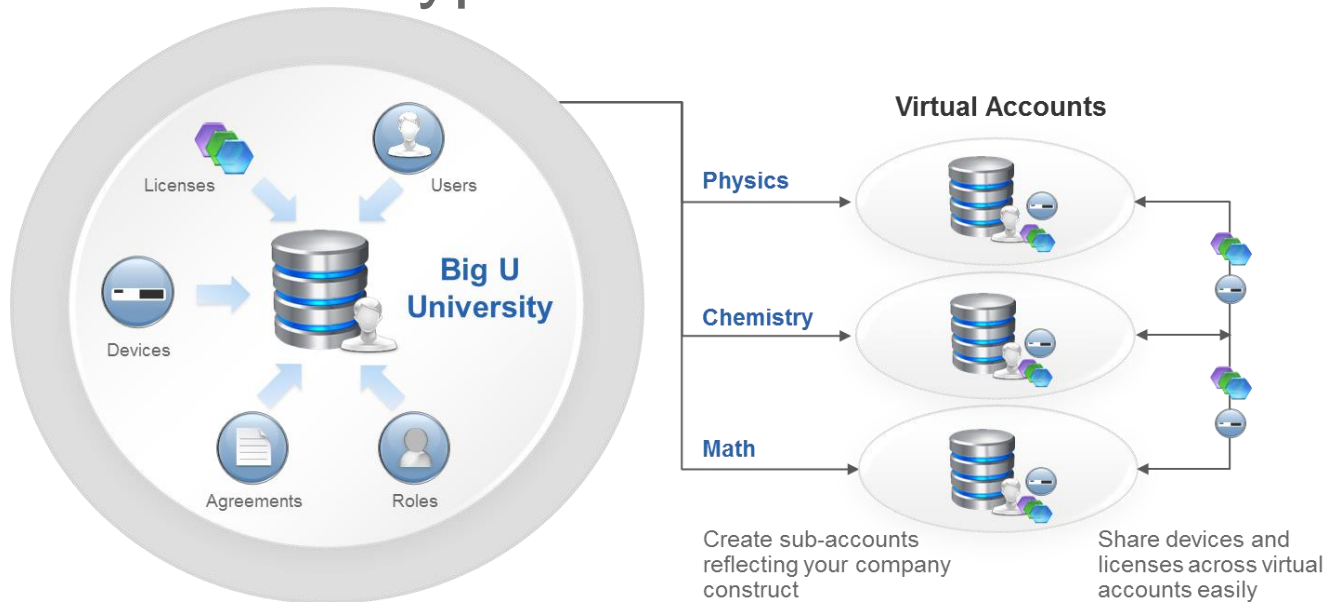
3 Additional Information



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

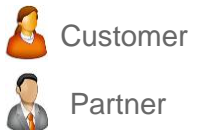
Who needs this: All Channel Partners

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



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.

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

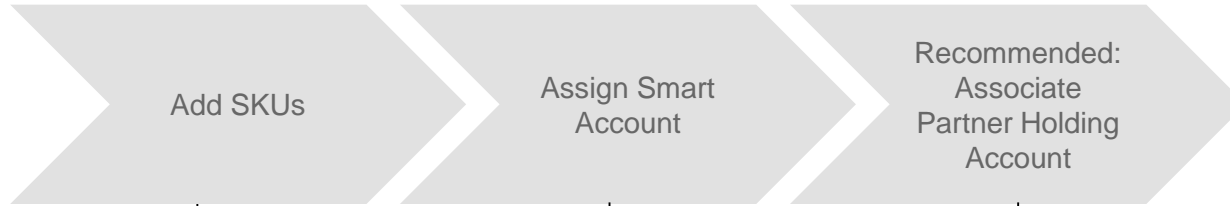
- Smart License enabled products cannot be stocked.

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.

Ordering and Assigning Smart Accounts

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.

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.

Worldwide [Change] Welcome, MARIA ROARK Account Log Out

CISCO Products & Services Support How to Buy Training & Events Partners

Cisco Commerce Search All... MARIA ROARK

Home Catalog Estimates & Configurations Deals & Quotes **Orders** **Services & Subscriptions** Software

1

The Powerful Pre-Sales Capabilities of Cisco Commerce

Check out this video to see how you can use established Build and Price features to manage your configurations, collaborate seamlessly with customers, partners and Cisco Sales, and streamline your overall experience.

Watch Video

Estimates: Created By Me

Estimate Description	Estimate ID	Estimate Name
----------------------	-------------	---------------

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

Create Order

- Access Shared Order
- Smart Account Orders
- View All
- Recent
- Shared
- Saved Searches
- Tags
- Invoices
- Returns

Public 12

CCW

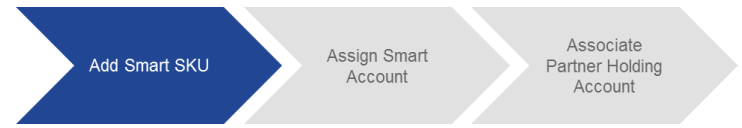
Getting Started – Upfront Smart Account Assignment

- 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.

The screenshot displays the Cisco Commerce Order interface. At the top, there is a navigation bar with tabs for 'Catalog', 'Estimates & Configurations', 'Deals & Quotes', 'Orders', and 'Service Con'. The 'Orders' tab is active. Below the navigation bar, there is a search bar and user information for 'MARIA ROARK'. The main content area shows the 'Order' page with a note: 'Note: Not all fields are required at this time, however, the more information you supply, the more accurately we can determine the value of your order.' Below the note, there are several form fields: 'Order Name' (Smart Account Order), 'Managed Service Order?' (radio buttons for Yes and No, with 'No' selected), 'Intended Use' (Resale), 'Price List and Address Information' (Global Price List in US Dollars), and 'Billing Information'. A red circle with the number '1' highlights the 'Assign Smart Account' button in the 'Smart Account Assignment' section. A modal dialog box titled 'Assign Smart Account' is open in the foreground. It has a close button (X) in the top right corner. The dialog contains the following text: 'Select Smart Account Type' with radio buttons for 'Customer Smart Account' (selected) and 'Holding Smart Account'. Below this, it says: 'Search for a Customer Smart Account using the customer's Domain ID (e.g., mycompany.com)'. There is a text input field with the placeholder 'Enter smart account domain identifier. For Example: mycompany.com'. To the right of the input field, there is an 'OR' separator and a link 'Request New Customer Smart Account'. At the bottom of the dialog, there are 'Cancel' and 'Assign' buttons. A blue callout box on the right side of the screenshot contains the text: 'Holding Account is assigned to the entire Order, whereas a Customer Smart Account is assigned to the specific lines, and can be edited at the line level.'

CCW

When is Smart Account Assignment Required



- 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.

1 Search by Sku, Description and Product Family

2 1.0 L-CSR-10M-AX-3S= SA
Smart Licensing SKU for 10Mbps AX 3-year
Smart Account Required Assign Now
Single License Key

3 2.0 FLASR1-CE-100R=
Unified Border Element Ent, 100 Sessions, Redundancy, Paper
SMART ACCOUNT Assign Now
Change to Multiple | Single License Key


	Hardware, Software and Services	P.O. Line Reference	Lead Time	Unit List Price (USD)	Qty	Ext. List Price (USD)
1	1.0 L-CSR-10M-AX-3S= SA Smart Licensing SKU for 10Mbps AX 3-year Smart Account Required Assign Now Single License Key		2 days	1,933.00	1	
3	2.0 FLASR1-CE-100R= Unified Border Element Ent, 100 Sessions, Redundancy, Paper SMART ACCOUNT Assign Now Change to Multiple Single License Key		21 days	13,763.00	1	

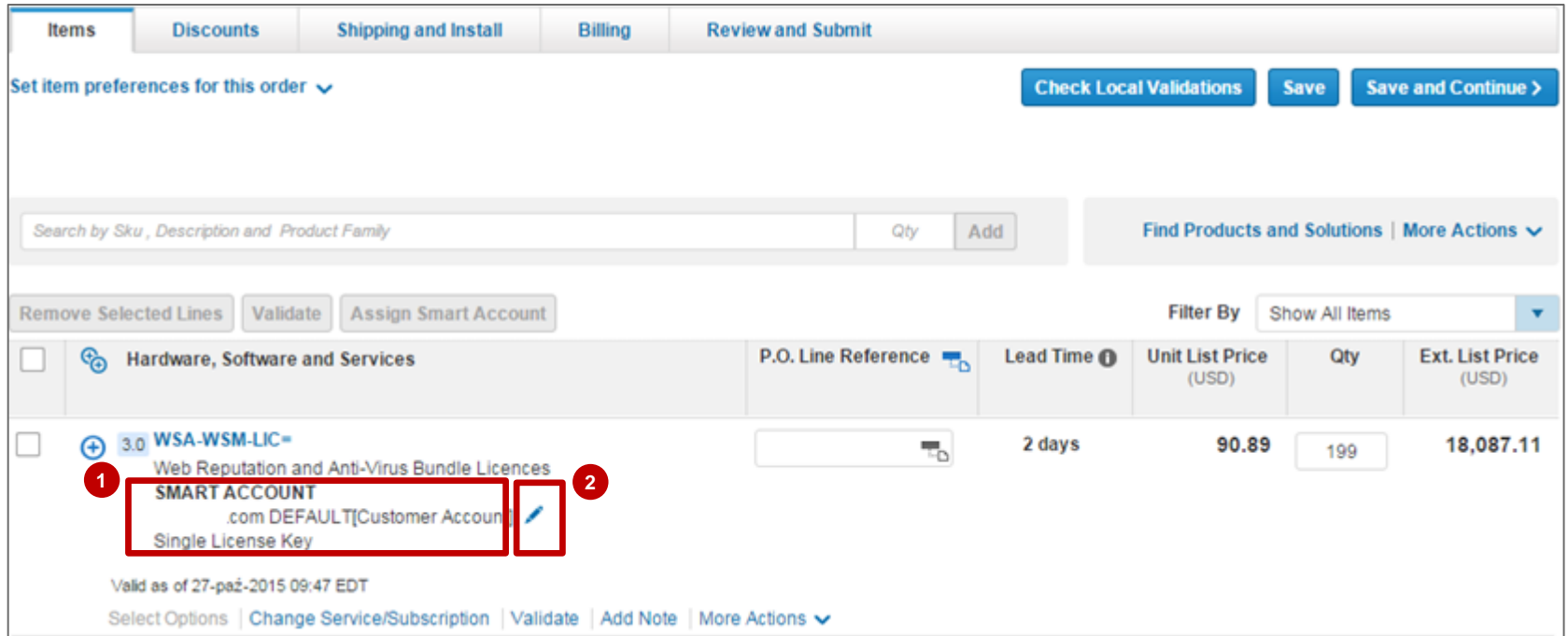
SA Icon and "Smart Account Required": SA assignment Mandatory (Smart Licensing)
"Smart Account message" = SA assignment optional. (e.g. PAKs). Provides more holistic view of classic PAK licenses in LRP.

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.







Items Discounts Shipping and Install Billing Review and Submit


Set item preferences for this order  [Check Local Validations](#) [Save](#) [Save and Continue >](#)

Search by Sku, Description and Product Family Qty Add [Find Products and Solutions](#) | [More Actions](#) 

[Remove Selected Lines](#) [Validate](#) [Assign Smart Account](#) Filter By [Show All Items](#) 

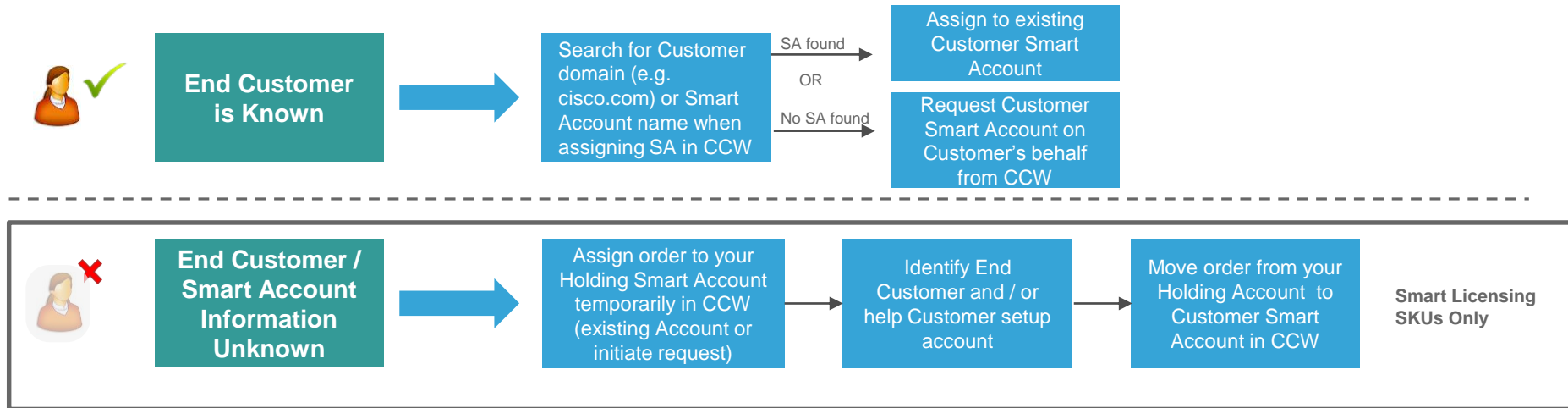
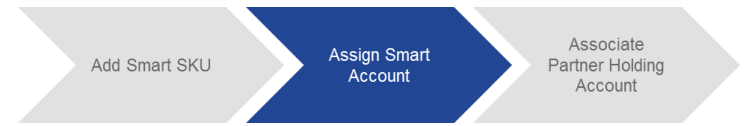
<input type="checkbox"/>	Hardware, Software and Services	P.O. Line Reference 	Lead Time 	Unit List Price (USD)	Qty	Ext. List Price (USD)
<input type="checkbox"/>	 3.0 WSA-WSM-LIC= Web Reputation and Anti-Virus Bundle Licences SMART ACCOUNT .com DEFAULT[Customer Account] Single License Key 	<input type="text"/>	2 days	90.89	199	18,087.11

Valid as of 27-pa2-2015 09:47 EDT

[Select Options](#) | [Change Service/Subscription](#) | [Validate](#) | [Add Note](#) | [More Actions](#) 

CCW

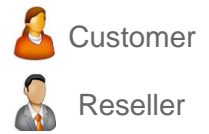
Assign Order to Smart Account: Partners



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

CCW

Assign Order to Smart Account: Distributors & Resellers



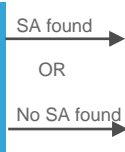
Smart Licensing
SKUs Only



**Distributor Works
Primarily with
Reseller Partner**

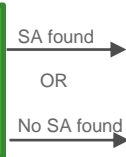


Search for Reseller domain (e.g. cisco.com) or Smart Account name when assigning SA in CCW



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



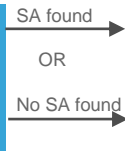
Assign to existing Customer Smart Account
Request Customer Smart Account on Customer's behalf



**Distributor has
Relationship with
End Customer**



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



Assign to existing Customer Smart Account
Request Customer Smart Account on Customer's behalf from 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



**Reseller /Customer
Information
Unknown or
Uncertain**



Assign order to Distributor Holding Smart Account temporarily in CCW



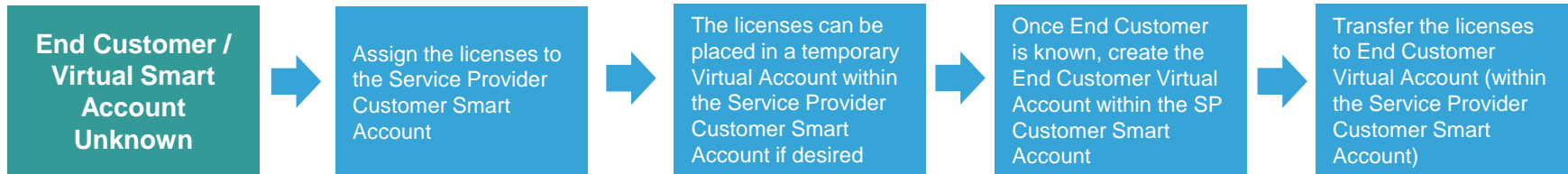
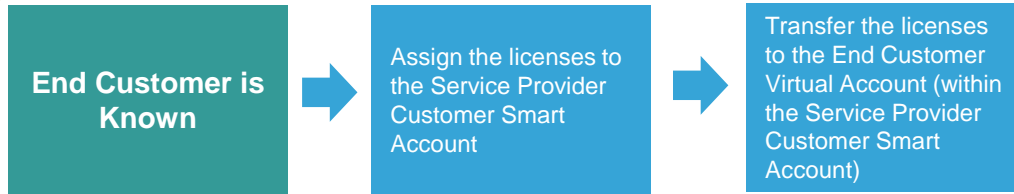
Move order from Distributor Holding Account to Reseller Holding Account or Customer Smart Account in CCW



Reseller will move order to Customer Smart Account in CCW

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.



CCW

Assigning Smart Account in Order

Add Smart SKU

Assign Smart Account

Associate Partner Holding Account

- 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.

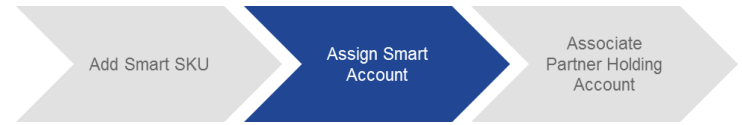
The screenshot displays the Cisco CCW interface for a purchase order. At the top, the order name is 'Test Order 27102015' and the status is 'UNSUBMITTED'. A red box highlights the 'SMART ACCOUNT' field with the text 'Assign Smart Account', and a red circle with the number '1' is placed above it. Below the order details, there are tabs for 'Items', 'Discounts', 'Shipping and Install', 'Billing', and 'Review and Submit'. A search bar is present with the text 'Search by Sku, Description and Product Family'. A red circle with the number '2' is placed above the search bar. Below the search bar, there are buttons for 'Remove Selected Lines', 'Validate', and 'Assign Smart Account'. A red box highlights the 'Assign Smart Account' button, and a red circle with the number '2' is placed above it. The main table shows two line items. The first item is '1.0 L-CSR-10M-AX-3S=' with a unit list price of 1,933.00 and a quantity of 1. A red box highlights the 'Assign Now' button next to the item, and a red circle with the number '1' is placed above it. The second item is '2.0 FLASR1-CE-100R=' with a unit list price of 13,763.00 and a quantity of 1. A red box highlights the 'Assign Now' button next to the item, and a red circle with the number '1' is placed above it. A red box also highlights the checkboxes for both line items, with a red circle with the number '2' placed to the left of the first checkbox.

	Hardware, Software and Services	P.O. Line Reference	Lead Time	Unit List Price (USD)	Qty	Ext. List Price (USD)
<input checked="" type="checkbox"/>	1.0 L-CSR-10M-AX-3S= Smart Licensing SKU for 10Mbps AX 3ve Smart Account Required Assign Now Single License Key		2 days	1,933.00	1	1,933.00
<input checked="" type="checkbox"/>	2.0 FLASR1-CE-100R= Unified Border Element Ent. 100 Se SMART ACCOUNT Assign Now Change to Multiple Single License Key		21 days	13,763.00	1	13,763.00

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.

CCW

Assigning Smart Account in Order



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.

The screenshot displays the CCW interface for an order. The main order details show the order name 'Test Order 27102015', purchase order number '70398542', and status 'UNSUBMITTED'. A red box labeled '1' highlights the 'SMART ACCOUNT' link in the header. Below the header, there are tabs for 'Items', 'Discounts', 'Shipping and Install', 'Billing', and 'Review and Submit'. A search bar is present with the text 'Search by Sku, Description and Product Family'. A table of line items is shown, with a red box labeled '2' highlighting the 'Assign Now' link for the first line item. A second red box labeled '3' highlights the 'Set the Smart Account at Order Level' link at the bottom of the page. Two modal windows are open: 'Assign Smart Account' and 'Assign Customer Smart Account'. Both modals have a search bar for 'Enter Smart Account Name or Domain Identifier (i.e. mycompany.com)'. The 'Assign Smart Account' modal has radio buttons for 'Customer Smart Account' and 'Holding Smart Account'. The 'Assign Customer Smart Account' modal has radio buttons for 'Assign to all current and future items in this order' and 'Assign only to currently unassigned items'. Both modals have 'Assign' and 'Cancel' buttons.

CCW

Assigning Smart Account in Order – Search

Add Smart SKU

Assign Smart Account

Associate Partner Holding Account

- 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.

ORDER NAME Test Order 27102015

PURCHASE ORDER # * WEB ORDER ID 70398542 STATUS UNSUBMITTED SMART ACCOUNT Assign Smart Account

Assign Customer Smart Account

Smart Account will only be assigned to Smart Account enabled items.

1 Search for a Customer Smart Account

Test

OR Request New Customer Smart Account

Customer Domain Identifier	Customer Account Name	Virtual Account Name
testdomain1445926148880.com	Cloud Services Cisco Internal1234	
testdomain1445925719639.com	Cloud Services Cisco Internal1234	
testdomain1445901954671.com	Cloud Services Cisco Internal1234	

2 Assign Cancel

3

Smart Licensing SKU for 10Mbps AX 3-year
Smart Account Required Assign Now
Single License Key

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.

New Smart Account Request [Close]

An email will be sent to the Smart Account Creator specified below to complete account setup
Specify the email address of the Smart Account Creator for the company's Smart Account *

4

Smart Account Domain Identifier *
Smart Account Domain Identifier is based on the email address of the Smart Account Creator and must belong to the company that w

ⓘ ✎ 5

Assign to all current and future items in this order.
 Assign only to currently unassigned items.

6

Cancel **Submit Account Request**

Editing domain identifier will require additional approval time.

CCW

Associating Partner Holding Account

Add Smart SKU

Assign Smart Account

Associate 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**.

The screenshot shows the Cisco Commerce Order management interface. The 'Orders' tab is selected. The 'SMART ACCOUNT' field is highlighted with a red box and a red circle '1'. The 'Associate partner holding account with order' link is highlighted with a red box and a red circle '2'. A callout box on the right explains the 'Partner Holding Account Association'.

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.

The screenshot displays the Cisco Commerce Order system interface. The top navigation bar includes 'Catalog', 'Estimates & Configurations', 'Deals & Quotes', 'Orders', 'Service Contracts', 'Subscriptions', and 'Software'. The 'Orders' tab is active.

The main content area shows an 'Order Review' section with a red error message: **Purchase Order # is mandatory.** Below this, there are three red circular icons representing 'Items', 'Discounts', and 'Shipping & Install'.

The 'Order Review' section includes fields for 'ORDER NAME Smart Accounts', 'PURCHASE ORDER # *', 'WEB ORDER ID 63715400', 'STATUS UNSUBMITTED', 'CREATED BY mariar on 11-May-2015', 'DEAL ID n/a', 'DEAL NAME n/a', and 'QUOTE STATUS n/a'. There are also buttons for 'Export', 'Print', 'Email', 'Share', 'Delete', 'Save as Estimate', and 'Clone Order'.

The 'Financial Summary' and 'Order Note' sections are partially visible at the bottom.

Overlaid on the right is a 'Product Detail' view for 'L-CUSP-SL-100= SA'. It shows a 'Qty *' field and an 'Add' button. Below this, there is a table with columns: 'Hardware, Software and Services', 'P.O. Line Reference', 'Lead Time', 'Unit List Price', and 'Qty'. The table contains one row: '1.0 L-CUSP-SL-100= SA' with a unit list price of '80,000.00' and lead time 'NPH'. Below the table, there is a description: 'CUSP Smart License enabled for 100 CPS', 'SMART ACCOUNT Assign Customer Smart Account', 'Single License Key', and a red warning: 'Q20350: A Smart Account is required for this product.' Below that, a yellow diamond icon indicates: 'This product is on New Product Hold (NPH). There is no restriction on Quoting or Ordering NPH products.'

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

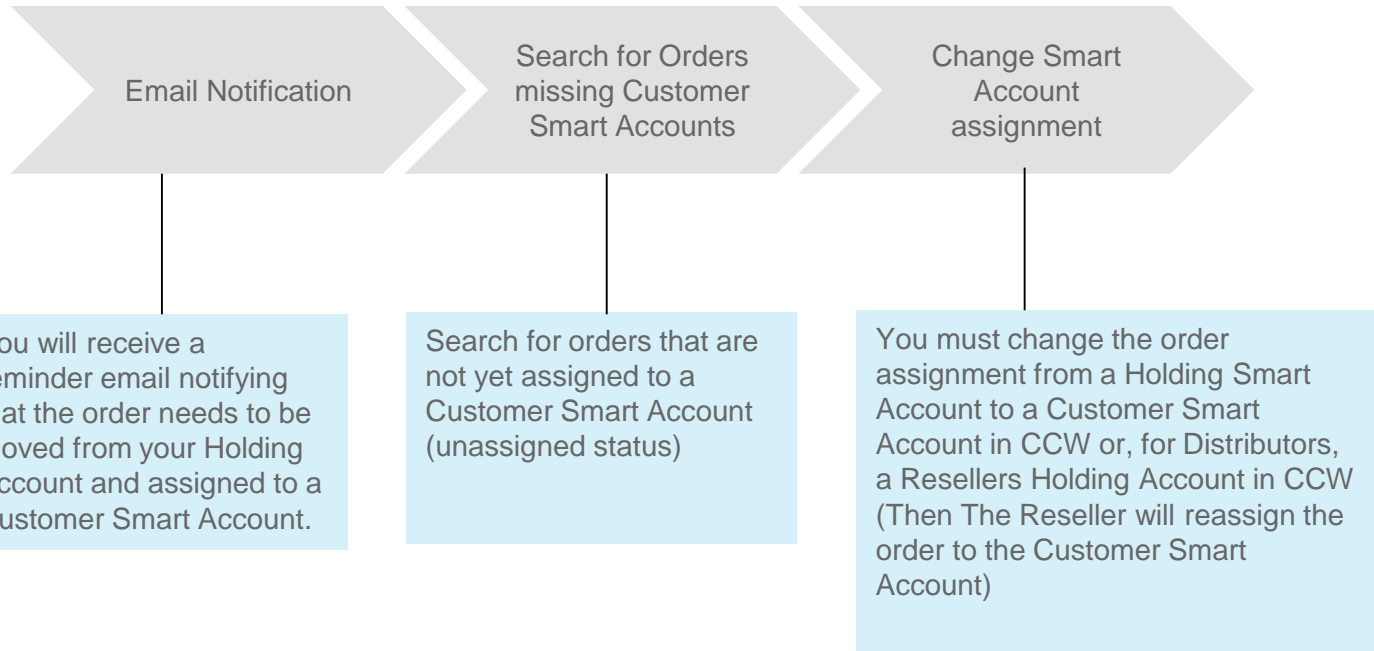
Changing Assignment from Partner Holding Smart Account to Customer Smart Account

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



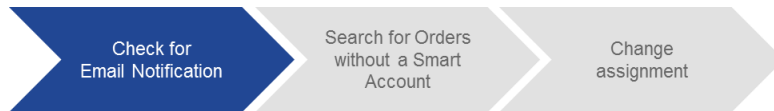
CCW

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/icw/pdrqo/req_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

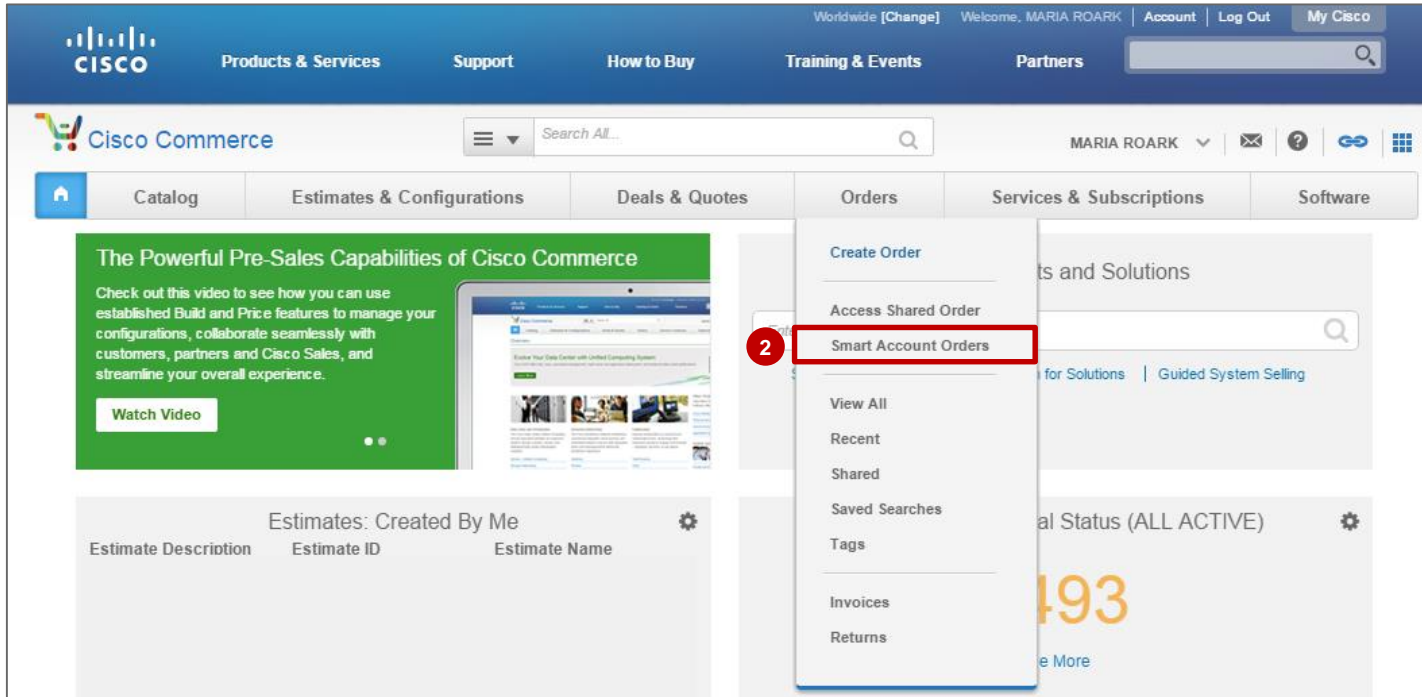
Search for Smart Account Orders

Check for
Email Notification

Search for Orders
without a Smart
Account

Change
assignment

- 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

Check for
Email Notification

Search for Orders
without a Smart
Account

Change
assignment

- 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.

The screenshot shows the Cisco Commerce Orders interface. The top navigation bar includes 'Catalog', 'Estimates & Configurations', 'Deals & Quotes', 'Orders' (selected), 'Services & Subscriptions', and 'Software'. A search bar at the top right shows 'Search All...'. The main content area displays a table of 36 results. The table has columns for 'Customer Smart Account Status', 'Order Name', 'Sales Order No.', and 'Web Order ID'. The first row is highlighted, with a red box around the 'Customer Smart Account Status' column header (marked with a red '1') and a red box around the 'Web Order ID' value '63341504' (marked with a red '2'). The table shows several rows with 'NOT ASSIGNED' status. A callout box on the right explains that 'Not Assigned' status indicates an order was originally assigned to a Holding Account and needs to be re-assigned to a Customer Smart Account. The bottom of the interface shows a pagination bar with '5 Items Per Page' and 'Page 1 of 8'.

Customer Smart Account Status	Order Name	Sales Order No.	Web Order ID
NOT ASSIGNED	Notification_TC_01_MAN_H...	100187860	63341504
NOT ASSIGNED	SA_Notification_test		
NOT ASSIGNED	SA_Notification_test2		
NOT ASSIGNED	Order-63470398	100192001	
NOT ASSIGNED	Order-63453006	100192456	

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

Check for
Email Notification

Search for Orders
without a Smart
Account

Change
assignment

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

The screenshot displays the Cisco Commerce Order management interface. At the top, there is a navigation bar with tabs for Catalog, Estimates & Configurations, Deals & Quotes, Orders (selected), Services & Subscriptions, and Software. A search bar and user profile (MARIA ROARK) are also visible. A prominent orange notification banner states: "This order contains Smart Account SKU's and/or SKU's which can be assigned to a Smart Account as an option." A red box highlights the link "View or change Smart Account Assignments" with a red circle containing the number 1. Below the notification, a star icon indicates a "Notification_TC_01_MAN_HOLD Order Booked" with a progress bar from Submitted to Closed. A "Change Order | Cancel Entire Order" button is present. The "Order Details" section includes a table with fields: SALES ORDER ID (100187860), PURCHASE ORDER # FOR CISCO (Notification_TC_01_MAN_HOLD), ACCOUNT MANAGER (with a "View Info" link), DEAL ID (--), PROGRAM TYPE (Standard), WEB ORDER ID (63341504), DPAS/TA (--), SHIPPING PRIORITY (--), TRADE-IN QUOTE # (--), PERIODIC BILLING (--), SUBMITTED BY (Jgose on 07 Apr 2015), and REMARKETING (--). Below the table are utility icons for Export, Share, Delete, Print, Email, Clone, and Add Dispute. A tabbed interface shows "Items" selected, with other tabs for Discounts, Shipping & Install, Billing and Invoice, and Order History. A "Federal Government" section shows "US Federal Government Order" with a "No" status. At the bottom, a "Line Item Status Summary" progress bar shows stages: Submitted (0), Order Processing (0), Booked (2), Scheduled (0), Production (0), Logistic Warehouse (0), Shipped (0), Subscription fulfillment (0), Invoiced (0), and Closed (0). The "Booked" stage is highlighted with a blue circle and the number 2. A "Show Me" link is under the Booked stage. "Order Status Definitions" is also visible.

SALES ORDER ID	PURCHASE ORDER # FOR CISCO	ACCOUNT MANAGER	DEAL ID	PROGRAM TYPE	WEB ORDER ID
100187860	Notification_TC_01_MAN_HOLD	View Info	--	Standard	63341504

DPAS/TA	SHIPPING PRIORITY	TRADE-IN QUOTE #	PERIODIC BILLING	SUBMITTED BY	REMARKETING
--	--	--	--	Jgose on 07 Apr 2015	--

Line Item Status Summary

Submitted (0) Order Processing (0) **Booked (2)** Scheduled (0) Production (0) Logistic Warehouse (0) Shipped (0) Subscription fulfillment (0) Invoiced (0) Closed (0)

line item(s) line item(s) line item(s) [Show Me](#) line item(s) line item(s) line item(s) line item(s) line item(s) line item(s)

CCW

Change Smart Account Assignment

Check for
Email Notification

Search for Orders
without a Smart
Account

Change
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**.

The screenshot shows the Cisco Commerce Order interface. At the top, there is a navigation bar with tabs for Catalog, Estimates & Configurations, Deals & Quotes, Orders (selected), Services & Subscriptions, and Software. Below the navigation bar, the 'Order' details are displayed in a table format. The 'SMART ACCOUNT' section is highlighted with a red box and a red circle with the number 1, containing the link 'Assign Customer Smart Account'. Below this, the 'HOLDING ACCOUNT' is listed as 'manualmsgchks.cisco.com'. The table also shows 'WEB ORDER ID' (63341504), 'STATUS' (SUBMITTED), 'CREATED BY' (jgose on 07-Apr-2015), and 'LAST UPDATED BY' (jgose on 07-Apr-2015). Below the table, there is a 'Filter By' dropdown set to 'Show All Items'. The main content area shows a list of items under the heading 'Smart Account Assignment'. The first item is 'A901-6CZ-FT-A SA' with a red box around the 'Assign Customer Smart Account' link. The second item is 'NC6-2/10X100G-M-K= SA' with a similar link. At the bottom of the page, there is a 'Showing 1 - 2 of 2 Line Items' indicator, a 'Previous' button, a page number '1', a 'Next' button, and a 'Submit' button highlighted with a red box and a red circle with the number 2. A red box also highlights the 'Assign Smart Account' button at the bottom left.

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
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-efi-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

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.

The screenshot displays the Cisco Commerce Order interface. At the top, there is a navigation bar with tabs for Catalog, Estimates & Configurations, Deals & Quotes, Orders (selected), Service Contracts, Subscriptions, and Software. Below this, the order details are shown, including the Order Name (NIHON Price List in Japanese Yen (JPY)), Purchase Order # (NA_68455553), Web Order ID (68455553), and Status (SUBMITTED). A red box highlights the 'View History' link in the header area, with a red circle and arrow pointing to it from step 1 of the instructions.

Below the order details, there is a table of Smart Account Assignments. The first row is highlighted, showing the assignment for '1.0 VMS-CVPN2-PKG-A SA' (Cisco VMS Cloud VPN Advanced Package, Annuity) assigned to 'renutest2.cisco.com DEFAULT [Customer Account]'. A red box highlights the 'View History' link in this row, with a red circle and arrow pointing to it from step 2 of the instructions.

The 'Smart Account History' modal window is open, showing a table with the following data:

Account Type	Old Value	New Value	Assigned By	Date Changed
CUSTOMER		ela12cisco.com	marlar	16-Oct-2015 17:54
HOLDING		hotmail0.558629528165530.2512931945156315.com	marlar	14-Oct-2015 14:07

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.

The screenshot shows the Cisco Commerce Order page. The top navigation bar includes 'Catalog', 'Estimates & Configurations', 'Deals & Quotes', 'Orders' (selected), 'Service Contracts', 'Subscriptions', and 'Software'. The main content area displays order details for Order-68455553, including purchase order number, web order ID, status (SUBMITTED), and smart account information (renutest2.cisco.com DEFAULT). A 'View History' link is visible next to the smart account details. Below this, a table lists line items, with the first item '1.0 VMS-CVPN2-PKG-A SA' highlighted. A red circle with the number '3' is placed over the 'View History' link for this line item, and a red arrow points from it to the 'Smart Account History' dialog box shown in the next screenshot.

The 'Smart Account History' dialog box is open, showing a table with the following data:

Account Type	Old Value	New Value	Assigned By	Date Changed
CUSTOMER	---	renutest2.cisco.com	mariar	01-Oct-2015 18:06

A red circle with the number '4' is placed over the top-left corner of the dialog box.

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

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.

The screenshot displays the Cisco Commerce Cloud (CCW) interface. The top navigation bar includes 'Catalog', 'Estimates & Configurations', 'Deals & Quotes', 'Orders', 'Services & Subscriptions', and 'Software'. The 'Orders' tab is active, showing a search bar and a user profile for 'MARIA ROARK'. Below the navigation, there are buttons for 'Download Reports' and 'Create New Order'. The main content area shows a list of 36 results. A table with the following columns is visible: 'Customer Smart Account Status', 'Order Name', 'Sales Order No.', and 'Web Order ID'. One row is highlighted with a red box, showing 'NOT ASSIGNED' status for the order 'Notification_TC_01_MAN_H...' with Sales Order No. 100187860 and Web Order ID 63341504. To the right, a detailed view of the order is shown, with a red box highlighting the link 'View or change Smart Account Assignments'. Below this, there are buttons for 'Change Order' and 'Cancel Entire Order'. A table at the bottom provides additional details for the order, including 'PURCHASE ORDER # FOR SCO', 'ACCOUNT MANAGER', 'DEAL ID', 'PROGRAM TYPE', 'WEB ORDER ID', 'DPAS/TAA', 'SHIPPING PRIORITY', 'TRADE-IN QUOTE #', 'PERIODIC BILLING', 'SUBMITTED BY', and 'REMARKETING'.

Customer Smart Account Status	Order Name	Sales Order No.	Web Order ID
NOT ASSIGNED	Notification_TC_01_MAN_H...	100187860	63341504
NOT ASSIGNED	SA_Notification_test		63394503
NOT ASSIGNED	SA_Notification_test2		63413385
NOT ASSIGNED	Order-63470398	100192001	63470398

PURCHASE ORDER # FOR SCO	ACCOUNT MANAGER	DEAL ID	PROGRAM TYPE	WEB ORDER ID
Notification_TC_01_MAN_HOL D	View Info	---	Standard	63341504

DPAS/TAA	SHIPPING PRIORITY	TRADE-IN QUOTE #	PERIODIC BILLING	SUBMITTED BY	REMARKETING
---	---	---	---	Jgose on 07 Apr 2015	---

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

Additional Information



Cisco Commerce Workspace (CCW)

Export Compliance Considerations

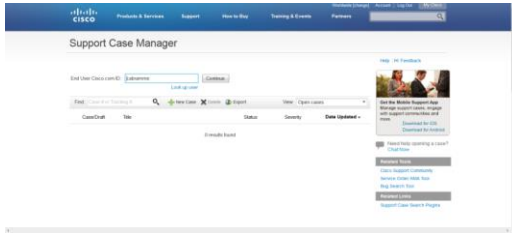
- A small segment of government and military entities located in countries outside the EU License-Free zone will be unable to activate export controlled features in Smart-enabled products due to export compliance issues.
- Manual business processes are in place to identify Customers in restricted countries 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.

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 Support for Enterprise and Service Providers

Note 1: Numbers with an asterisk (*) have special dial instructions.

1. Dial the Local Access number.
2. After the chime, dial the Card number and PIN number 5689.
3. After you hear a few beeps, dial *99.
4. If dialing *99 does not work, the operator will ask you what number you wish to dial; use the card number.

Note 2: Numbers with a double asterisk (**) may not be available from all mobile phones.

United States	1 800 555 2447 1 408 526 7208
Africa	+32 2 704 6565
Argentina	Preferred contact: 0800-555-3456 ** Alternate numbers: ALA: 0 800 298 5288, then 888 443 2447 Telecom: 0 800 555 4286, then 888 443 2447 Telefonica: 0 800 222 1288, then 888 443 2447
Armenia	800-721-7549

[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



Any Questions



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.



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	