

Standard Partner Holding Smart Account Structure

Best Practices

What is a Partner Holding Smart Account what it is used for?

A Partner Holding Smart Account is used by Partners to store orders temporarily before they are deposited to End Customer Smart Accounts.

Why would a Partner need a Partner Holding Smart Account?

To store orders temporarily when the End Customer or the Customer's Smart Account is unknown. Once the Customer is identified post-order, the Partner will transfer the order to the Customer Smart Account.

What are the Benefits of a Partner Holding Smart Account for the Partner?

A Partner Holding Smart Account can serve as one central storage location for Customer orders. Assigning a Holding Account on an order also provides company-wide access to the order. A Holding Account reduces order friction, because the order can be booked even if Customer SA is unknown.



Partners

Distis/2T Partners

End Customer / Smart
Account Information
Unknown



Assign order to your
Holding Smart Account
temporarily in CCW

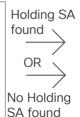
Identify End Customer and / or help Customer setup account Move order from your
Holding Account to
Customer Smart
Account in CCW



Distributor
Works
Primarily with
Reseller
Partner



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



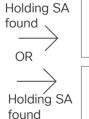
Request Holding Smart Account on Reseller's behalf from CCW

Assign to Reseller's

existing Holding

Smart Account

Reseller will move order to Customer Smart Account in CCW



Assign to existing
Customer Smart
Account

Request Customer Smart Account on Customer's behalf

cisco

General Best Practices - Recommendations



- Create one Partner Holding Smart Account for your organization.
- If you have one centralized purchasing department, one Virtual Account should be sufficient to manage your orders (or you can create one Virtual Account in addition to the Default Virtual Account).
- If you have purchasing departments in multiple locations / countries, you can create multiple Virtual Accounts.
- If you are a global company with multiple independent subsidiaries and multiple purchasing departments, you have the option to request for multiple Partner Holding Smart Accounts.



• If your End Customer is unknown at the time of order, the Partner Holding Smart Account provides the ability to temporarily deposit Cisco Software orders until the End Customer Smart Account or downstream 2-Tier Partner Holding Smart Account is known.



• If you are also purchasing Cisco Software licensing for internal consumption and not for resale, you should create one Customer Smart Account for your organization. Virtual Accounts allow you to segment your assets by organizational unit (e.g. country, region, department, business line, another organizational unit). You can create multiple Virtual Accounts within your Smart Account.



- Since B2B Partners use a single CCO User ID to place B2B orders across entities, they are only able to have a single Default Partner Holding Smart Account (a Default Holding Account associated to their CCOID for B2B orders).
- The Cisco ID for B2B Partner orders typically has the following format: CompanyName-Xml



Partners

01 - Default

Account

Holding

Partner

SA

Approver

SA Admins/ **Approvers**

Operating in one Country or State, with Local Presence, Centralized Procurement

Company Type: Small or Medium Business Company operating in one Country or State, local presence.

Company Information/ Structure:

- 1 location
- Centralized Purchasing Department (Procurement)

Number of Partner Holding Accounts:

1 Partner Holding Account

Number of Virtual Accounts:

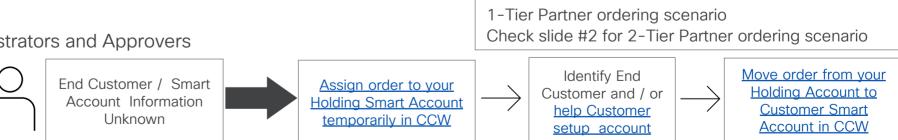
1 Virtual Account (Default)

Structure of Virtual Accounts:

N/A (Centralized Procurement)

Number of Users/ Admins:

- 1 Smart Account Approver
- 2-4 Smart Account Administrators and Approvers





Account

Partners

Global or Regional Presence, Centralized Procurement

Company Type: Global or Regional Company

Company Information/ Structure:

- 2+ locations (Global presence or Regional presence)
- Centralized Purchasing Department (Procurement)

Number of Smart Accounts:

1 Partner Holding Account

Number of Virtual Accounts:

2 Virtual Accounts (one Default and one additional)

Structure of Virtual Accounts:

N/A (centralized)

Number of Users/ Admins:

- 2 Smart Account Approvers
- 2 Smart Accounts Admins and Approvers
- 2 Account Users
- 2 Virtual Account Admins
- 2 Virtual Account Users



Account SA Admins/ **Approvers SA Admins** Holding SA Approvers Partner SA Users

01 - Default Admins VA Users X X 02 - Central

1-Tier Partner ordering scenario Check slide #2 for 2-Tier Partner ordering scenario

Move order from your Identify End Holding Account to Customer and / or **Customer Smart** help Customer Account in CCW setup account





Holding Smart

in CCW

Global or Regional Presence, Decentralized Procurement

Company Type: Global or Regional Company

Company Information/ Structure:

- 2+ locations (Global presence or Regional presence)
- Decentralized Procurement: Purchasing Departments in multiple Regions/Countries (one local Procurement Dept. for each subsidiary/branch)

Number of Smart Accounts:

1 Partner Holding Account

Number of Virtual Accounts:

2-100 Virtual Accounts (as many as the local Purchasing Departments)

Structure of Virtual Accounts:

by Location (City, Country, Region)

Number of Users/ Admins:

- 2 Account Admins and Approvers, 2 Admins, 2 Approvers
- 2+ (2-100) Virtual Account Admins, 2+ (2-100) Virtual Account Users
- 2 Account Users

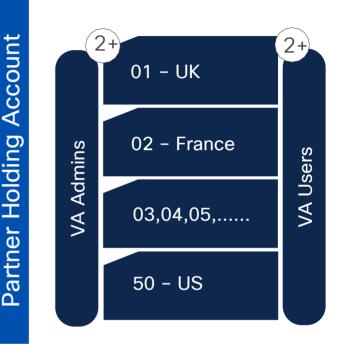


Holding SA Approvers Partner SA Users

SA Admins/

Approvers

SA Admins



1-Tier Partner ordering scenario Check slide #2 for 2-Tier Partner ordering scenario

Move order from your Identify End Holding Account to Customer and / or **Customer Smart** help Customer Account in CCW setup account



Partner Holding Account

Holding Smart

in CCW

Virtual Account

SA Role

VA Role

Global or Regional Presence, Centralized Management of Holding SA, Decentralized Procurement

Company Type: Global or Regional Company Company Information/ Structure:

- 2+ locations (Global presence or Regional presence)
- Decentralized Procurement: Purchasing Departments in multiple Regions/Countries (one local Procurement Dept. for each subsidiary/branch)

Number of Smart Accounts:

1 Partner Holding Account

Number of Virtual Accounts:

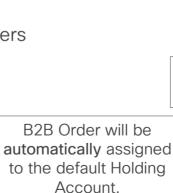
2+ Virtual Accounts (as many as the Purchasing Departments).

Structure of Virtual Accounts:

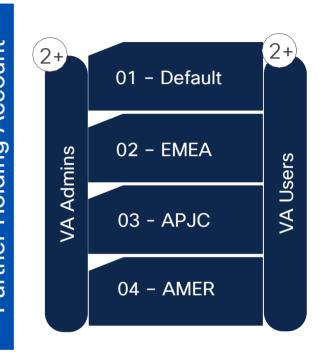
by Location (City, Country, Region)

Number of Users/ Admins:

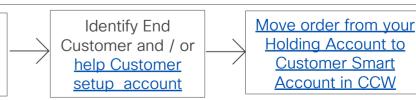
- 2 Smart Account Approvers, 2 Smart Accounts Admins and Approvers
- 2+ (2-100) Virtual Account Admins
- 2+ (2-100) Virtual Account Users
- 2 Account Users



Account SA Admins/ **Approvers SA Admins SA Approvers** Partner SA Users



1-Tier Partner ordering scenario Check slide #2 for 2-Tier Partner ordering scenario





KEY:

Partner Holding Account

Virtual Account

SA Role

VA Role

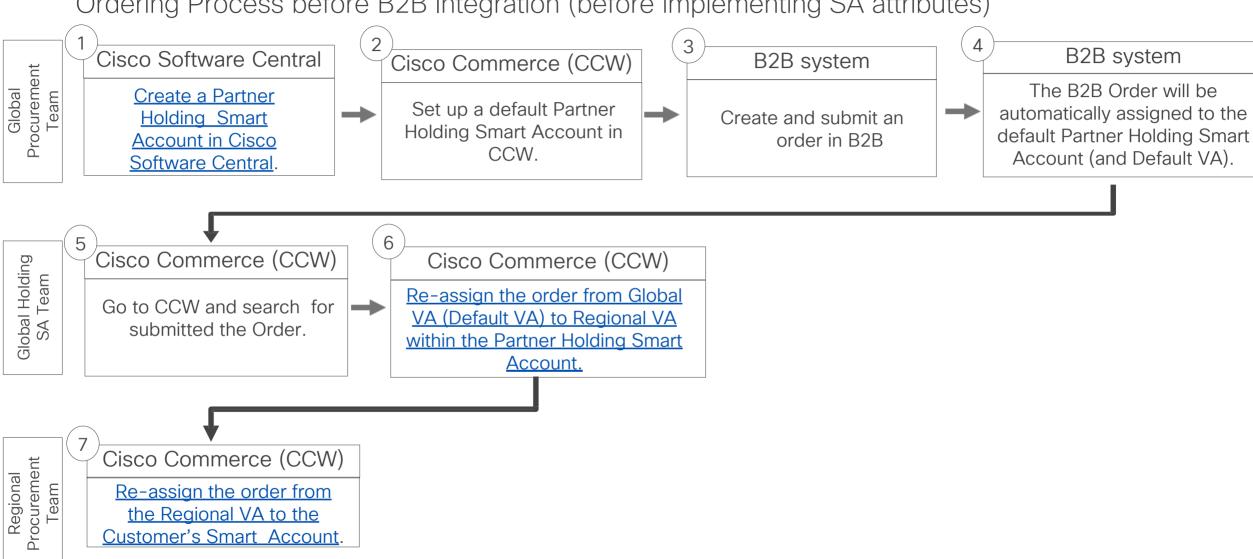
End Customer /

Smart Account

Information Unknown

B2B Partners

Ordering Process before B2B Integration (before implementing SA attributes)



I-Tier Partners



Cisco Software Central

Create a Partner **Holding Smart** Account in Cisco Software Central. Cisco Commerce (CCW)

Create a Quote/Order or standalone Order in CCW. Cisco Commerce (CCW)

If the Customer is known. assign directly the Customer Smart Account. Optional: associate your

Partner Holding Account.

If the Customer or Customer's SA is unknown. assign your Partner Holding Smart Account. Request SA for your Customer in CCW.

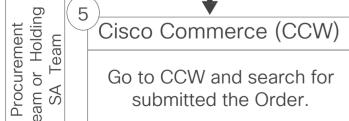
Cisco Commerce (CCW)

Cisco Commerce (CCW)

Submit the order.

Cisco Commerce (CCW)

Submit the order.



Go to CCW and search for submitted the Order.

Cisco Commerce (CCW)

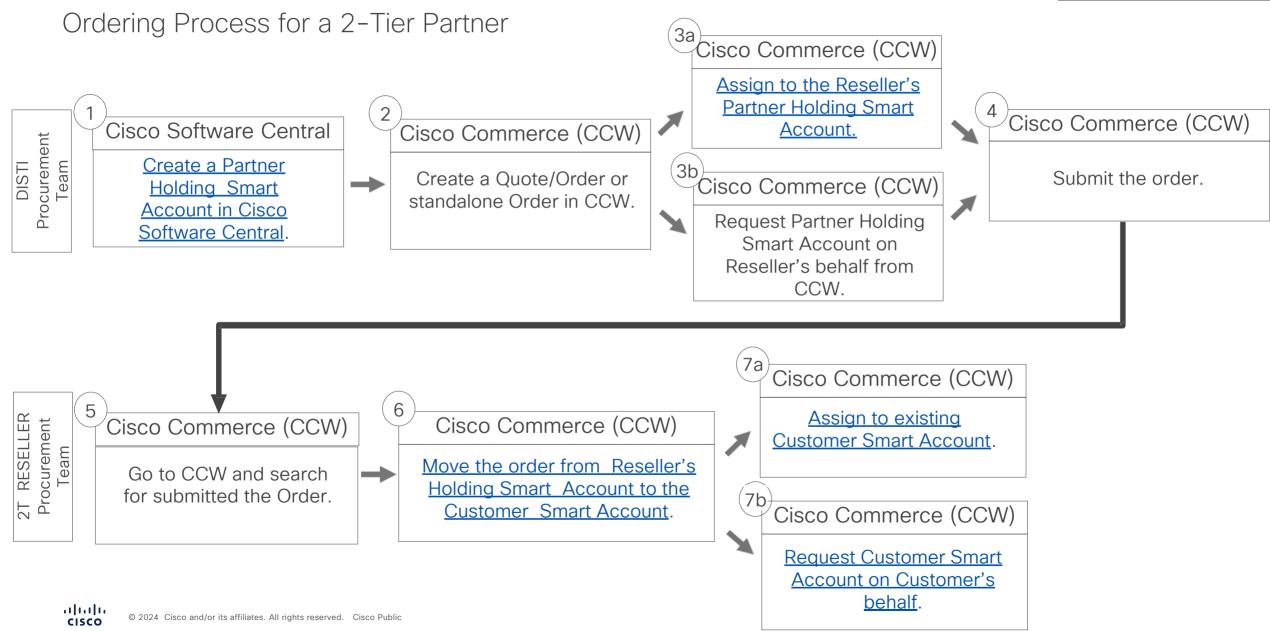
Move the order from Partner Holding Smart Account to the **Customer Smart Account**



Team or

Procurement

Distributors and 2-Tier Resellers



B2B Ordering with Smart Accounts

Appendix



B2B - Smart Account Changes

B2B - Implementing Smart Account Changes

Partners should incorporate Smart Account changes in their B2B system prior to placing orders.

There are two types of Smart Account attributes that can be incorporated in the Partner's B2B system:

- 3A4 attribute allows the Partner to assign a Smart Account when creating an order in their B2B system.
- Smart Account attribute on Quoting punch-out: allows the Partner to assign a Smart Account in the B2B Quoting punch-out.
- Please check the <u>Implementation Guidelines</u> for ordering that include information about Smart Licensing.
- For more information about the Smart Account attribute on Quoting punch-out (cXML), check these <u>Implementation Guidelines</u> owned by the B2B Team.

Smart Account Mandatory products are identified in the B2B catalog.

As regards the 3A4 attribute, non-mandatory fields can be added to XML forms, so users enter Smart Account information when placing the order through B2B:

- At order level, users can enter information for Customer Smart Account and Customer Virtual Account, and/or Holding Smart Account and Holding Virtual Account.
- At line level, users can enter information for Customer Smart Account and Customer Virtual Account. If users do not enter
 any Smart Account information and they have not yet created and specified a default Holding Smart Account in their
 Cisco Commerce profile, Cisco will contact them to set it up.



B2B Quoting and Ordering with Smart Accounts

Q20 Process - Options for B2B Partners

Smart Account Mandatory SKU (e.g., Smart License): Required to assign a Smart Account to deliver licenses to Customer Create a Holding Smart Account in Cisco Smart Account Optional SKU (e.g., PAK): Assignment to SA is Software Central. optional (but recommended). You can edit the Smart Account assignment Yes before Order submission Set up a default Holding Have you implemented Smart Account in CCW Assign a Smart Account the 3A4 Smart Account on Quote. SA assignment attribute? Yes will carry over to the Submit the Order with the Order Smart Account Have you implemented assignment carried over the Smart Account Assign a Smart Account from Quote. Yes attribute on Quoting directly on the B2B Order. punch-out? Have you implemented the 3A4 Smart Account No attribute? The B2B Order will be Re-assign the Order to the End Customer Smart assigned to your default No Holding Smart Account. Account in CCW. B2B Quoting Punch-Out (Y); 3A4 (Y) → Select Smart Account on Quote, then transfer to Order. You can edit/add Smart Account before submitting the Order. B2B Quoting Punch-Out (N); 3A4 (Y) → Assign Smart Account at the time of order and then Submit the Order. B2B Quoting Punch-Out (Y); 3A4 (N) → Select Smart Account on Quote, then transfer to Order and submit the Order. B2B Quoting Punch-Out (N); 3A4 (N) → B2B Order will be assigned to your default Holding Smart Account. After order submission go to CCW

to re-assign the Order to the End Customer's Smart Account.

How Partner Internal Roles can be mapped to Holding Account Roles



Smart and Virtual Account User Roles



Smart Account Administrator

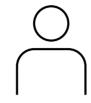
Edit Smart Account properties, add and edit users and Virtual Accounts, view event logs, and manage licenses for the entire Smart Account.



Smart Account Approver

Edit Smart Account properties, view all users, and view event logs.
Approvers cannot manage licenses.

Note: This role is used less and less, as Admin and User roles are more preferred.



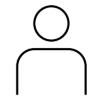
Smart Account User

Access all Virtual
Accounts and
perform licensing
activities but cannot
create new Virtual
Accounts or manage
users.



Virtual Account Administrator

Add and edit users to assigned Virtual Accounts, view event logs for assigned Virtual Accounts, view account agreements, and manage licenses for the assigned Virtual Accounts.



Virtual Account User

Manage licensing for Virtual Accounts they are assigned to, but they cannot add new users.



Smart / Virtual Account Viewer

Access the Licensing tools and view the content or data but may not have the ability to add, delete, transact or modify.



Partner Holding Smart Account - Roles

Access to Holding Account and Partner Roles Involved

- The access to the Partner Holding Account provides the following options:
 - Visibility to the orders assigned to a Partner Holding Account in Cisco Commerce.
 - Ability to re-assign the license on the order from the Partner Holding Account to the Customer Smart Account.
 - Option to set up email notification settings: receive an email when orders are provisioned to the Holding Account
- 2 Examples of Partner Roles that should have access to the Partner Holding Account:

Partner Role	Partner Function	Smart Account Role* (Global Role)	Virtual Account Role* (Local/ Dept. Role**)
Post-Sales Specialist	Anyone who is reassigning an order from a Partner Holding Account to an End Customer's Smart Account.	Smart Account User	Virtual Account User
Purchasing Team Manager	Person managing the Purchasing Team.	Smart Account Admin	Virtual Account Admin
IT Admin Specialist	Person managing the IT Administration	Smart Account Admin	Virtual Account Admin

^{*}A Smart Account Admin or User has access to the entire Smart Account, while a Virtual Account Admin or User has access only to selected Virtual Account(s).

^{**}Local/Department Role: the Partner may want separate Virtual Accounts by Organizational Unit * (ex. business line, product family, department, region, country, etc.) to allow separate access/ visibility to different purchasing departments and post-sales departments.





The bridge to possible