Software Subscriptions and Services (CCW-R)

Smart Account User Guide
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1 Introduction

This user guide provides detailed instructions for using Cisco Commerce to manage Smart Accounts in the Software Subscriptions and Services (CCW-R) tool. It assumes you have already read the appropriate user guide, shown in the list below, for your user type, and that you have read the Smart Accounts User Guide, which explains Smart Accounts for Cisco Commerce in general.

**PRO TIP** Review your user profile before using Software Subscriptions and Services (CCW-R) in Cisco Commerce. See the document list below for how to ensure your user profile is set up correctly.

For more details on using the Software Subscriptions & Services (CCW-R) space in Cisco Commerce, refer to the links below.

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1.1 Smart Accounts Overview

Cisco Smart Accounts enable you to manage license assets on your own. Through your Smart Account, you can view and control access to all of your Cisco software licenses and entitlements across your organization. Before Smart Accounts, visibility to entitlements required individual Cisco.com identification, which restricted license management and reporting capabilities.

Smart accounts offer the ability for customers, partners, and Cisco to share a common view of hardware, software entitlements, and services in the Cisco Smart Software Manager interface. In that space, all Smart Software Licensed products, upon configuration and activation with a single token, will self-register, removing the need to go to a website and register products with PAKs. Instead of using PAKs, your company can manage a pool of software licenses or entitlements in a flexible and automated manner. Your customers can self-manage license deployments easily and quickly in the Smart Software Manager.

1.2 Types

1. **End Customer Smart Account**: A Customer Smart Account identifies the customer for whom this order is being placed. End Customer Smart Accounts help customers view, manage and use entitlements they have purchased. The creation of your End Customer Smart Account is a one-time setup activity.

   **Note**: End Customer Smart Account can be assigned only to request line(s) where service level Entitlement Party is Install-at (CBR).

2. **Virtual Account**: A subset of a Smart Account that a customer can use to organize licenses. For example, if “BigU.edu” is a customer’s umbrella Smart Account, they can also create “BigU.edu Physics Department,” a virtual account where they can deposit all licenses pertaining to BigU’s Physics Department. When you create a Smart Account, a corresponding default virtual account is automatically created at the same time.

3. **Holding Smart Account**: A Holding Smart Account allows Partners to temporarily store unassigned orders until they can be assigned to an identified Customer Smart Account. Partners must assign a Customer Smart Account to products and services before the customer will be able to access and use those entitlements.

4. **Partner Smart Account**: A Partner Smart Account identifies the Partner for whom this order is being placed. Partner Smart Accounts help Partners view, manage and use Partner Branded Service entitlements they have purchased.

   **Note**: Partner Smart Account can be assigned only to request line(s) where service level Entitlement Party is Bill-to (PSS).

1.3 Roles

1. **Smart Account Administrator**: This user type can view and manage license inventory for the entire Smart Account and perform account management activities. This user can edit account properties, add, edit, or delete virtual accounts, add, edit, or delete users, and accept the Smart Licensing Agreement.

2. **Virtual Account Administrator**: This user type can view and manage licenses only in specific virtual accounts for which the Smart Account administrator has granted them access.
3. **Smart Account User**: This user type can view and manage license inventory for the entire Smart Account.

4. **Virtual Account User**: This user type can view and manage license inventory for assigned virtual account(s).

1.4 End Customer Smart Account Mandatory Check Logic

Whether an End Customer Smart Account is mandatory for your quote or transaction is based on:

1. **Smart Account setup**: If the quote/transaction has End Customer Smart Account-enabled products or SKUs, which are deemed mandatory.

2. **Opt-in process setup**: As an End Customer, if you have chosen to have Smart Account experience enabled for all your assets. This can be set up via an entitlement tool (ESM). If you have chosen to opt-in, End Customer Smart Account will be mandatory regardless of the product setup.

1.5 Quoting/Contract Administration Transaction Basics

1. Once you have created a Quote or an Add to Contract transaction, you will notice an option to assign a Smart Account in the quote/transaction header and on your lines.

   **Note**: Assign Smart Account link will always be available for quotes / transactions with Technical Services (TS) lines. Subscriptions only (TnC) lines will have Assign Smart Account link available for a quote/transaction including Smart Account-enabled products or if the user has opted in for Smart Account assignment.

2. A line item with a mandatory Smart Account will have an error if Smart Account is not assigned.
3. If a Smart Account information is already available in the system, the details will be defaulted on the lines, which can be modified as needed. If there are more than one Smart Account for an instance, one of the active Smart Account will be randomly chosen.

4. The Smart Accounts (End Customer, Holding and Partner) assigned at the header will be cascaded to the lines below. If you add a new line, Smart Account will be cascaded to the newly added lines.

5. If you change your service type (PSS to CBR or vice versa) on a request line which has a Smart Account assigned, your Smart Account value will be nullified.
2 Smart Account Operations from the Quote Header

2.1 Adding a Smart Account

1. To add a Smart Account from the quote header, first click Assign Smart Account in the quote header.

![Assign Smart Account](image)

2. The Assign Smart Account window will appear. Informational icons, along with banner messages provide details about Smart Account types. Choose the desired account type you wish to add to the quote.

![Assign Smart Account](image)

**PRO TIP**
You can only add a Holding via the Quote Header. You cannot add it to a quote at the line level. The option to add a Partner Smart Account in the header and line level will be present based on your service level.
2.1.1 Adding an End Customer Smart Account

1. To add your End Customer Smart Account, start by typing the Email ID or Domain Identifier in the search bar. A dropdown will appear with the Account Domain Identifier, Account Name and Status fields.

2. Select your End Customer Smart Account.

**Note:** If you choose an account with the status being in a “Pending” condition, a new field will appear within the window, requiring you to nominate an additional Smart Account creator. You will also not be able to assign a Virtual Account Name.
3. If the desired Smart Account is unavailable, you can request a new End Customer Smart Account. See Requesting a New Smart Account section of this document to learn more.

4. Select the radio button below to choose to assign this End Customer Smart Account to all current and future Install-at entitled items on the quote, or to only currently unassigned Install-at entitled items. If you choose the latter, Install-at entitled items that currently do not have a line-level Smart Account will have this account added.

5. When you are finished click Assign.

6. You can see your End Customer Smart Account added to the appropriate lines on the quote.

2.1.2 Adding a Holding Smart Account
1. You can add a Holding Smart Account to your quote by selecting the Holding Smart Account option within the Assign Smart Account window.

2. Search for the Holding Smart Account by typing the typing the email ID or domain identifier in the search bar. Your search criteria will search the Account Domain Identifier, Account Name and Status fields.
3. If the desired Smart Account is unavailable, you can request a new Holding Smart Account. See Requesting a New Smart Account section of this document to learn more.

4. Make a selection and click Assign.

5. You can see your Holding Smart Account added to all your lines.

2.1.3 Adding a Partner Smart Account

1. You can add a Partner Smart Account to your quote by selecting the Partner Smart Account option within the Assign Smart Account window.

Note: Partner Smart Account option is only available if you have one or more request lines with service level Entitlement Party is Bill-To.
2. You can search for the Partner Smart Account by typing the Email ID or Domain Identifier in the search bar. Your search criteria will search the Account Domain Identifier, Account Name and Status fields.

3. Select your Partner Smart Account.

![Assign Smart Account](image)

**Note:** If you choose an account with the status being in a Pending condition, a new field will appear within the window, requiring you to nominate an additional Smart Account creator.

4. If the desired Smart Account is unavailable, you can request a new Partner Smart Account. See Requesting a New Smart Account section of this document to learn more.

5. Select the radio button below to choose to assign this Partner Smart Account to all current and future Bill-to entitled items on the quote, or to only currently unassigned Bill-to entitled items.
If you choose the latter, Bill-to entitled items that currently do not have a line-level Smart Account will have this account added.

6. When you are finished, click Assign.

7. You can see your Partner Smart Account added to the appropriate lines on the quote.

8. If you have added multiple accounts, you can find all your accounts at the header level and line-level. You can edit or delete them.
2.1.4 Adding a Virtual Account

1. You can add a Virtual Account for your End Customer, Holding or Partner Smart Account to your quote by typing in the Virtual Account name in the Virtual Account Name field.
2. A drop down will appear and you can also choose an existing Virtual Account name.
3. The dropdown list of Virtual Account will only show Public Virtual Accounts.

**Note:** You cannot assign a Virtual Account if you have chosen an End Customer, Partner or Holding Smart Account which is in pending status.

4. If you have chosen to not enter a Virtual Account (keeping Virtual Account field empty) for your End Customer Smart Account, CCWR will auto assign a default Virtual Account for your End Customer Smart Account.
Assign Smart Account

End Customer Smart Account

An End Customer Smart Account can be assigned to request line(s) where service level Entitlement Party is install-at.

Virtual Account Name

Assign Smart Account To
- Assign to all current and future Install-at entitled items.
- Assign only to currently unassigned Install-at entitled items.

Request a new Customer Smart Account

Cancel  Assign

Quote Number

Buy Method

Created By

Smart Account

End Customer Smart Account

abc@gmail.com DEFAULT

There are errors on 1 lines. Use the appropriate filter to view them.

Item

Discounts  Billing  Review and Submit

Remove From Quote  Edit Lines  More Actions

Product Number  Service/Offer Type  PAK/Serial/Instance Number  End Customer  Start End Date  Unit List Price  Quantity

SL-19-APP-K9

ECMU  Target Contract

01-SEP-2019

31-AUG-2020

Smart Account: abc@gmail.com DEFAULT [Customer Account]
2.2 Requesting a New Smart Account

1. Within the Assign Smart Account window, you can indicate your selection to Request a new End Customer, Partner or Holding Smart Account. The New Smart Account Request window will appear.

**PRO TIP** You can only request a Holding via the Quote Header. You cannot request it while you are adding a Smart Account at the line level.

2. Enter the customer email ID per the instructions.
3. The system will create a new Smart Account Domain Identifier based on the email address. You may edit the default domain identifier if desired, but please read the information provided by clicking the information icon before proceeding.
4. You can also assign your Smart Account to all current and future or currently unassigned items. **Note**: This option is only present for End Customer and Partner Smart Account.
5. Click **Submit Account Request** when you are finished.

6. If the domain identifier is already in use, you will see an error message. Simply edit the default by clicking the pencil icon and try to submit as before.
3 Smart Account Operations at the Line Level
You can add or edit End Customer or Partner Smart Account from the line level of a quote.

PRO TIP You can only add Holding Smart Account at the quote, or “header,” level.

3.1 Adding an End Customer/Partner Smart Account

1. While you are viewing the items tab of your quote, click the pencil icon next to the Smart Account field.

2. A window will appear, allowing you to assign either an End Customer or Partner Smart Account. The option will be based on the service level Entitlement Party on the request line(s). The process of assignment at line level remains similar to the section above, within an additional option to assign the Smart Account at header level.

3. You can also select your End Customer Smart Account from the Suggested SA for End Customer section and skip performing the search. The suggestions are based on your historical Smart Account assignment.

Note: This is only available while doing line-level(inline) assignment/edits for End Customer Smart Account setup.
4. You can edit and delete your End Customer/Partner Smart Account at the line level once assigned.

5. If you wish to add the same End Customer/Partner Smart Account for multiple lines, select the lines and click **Assign Smart Account** from the **More Actions** dropdown menu. This option will be enabled only if two or more lines are selected. Once you click it, the process to assign will be similar to the section above.
4 Filters and Export

6. Filter your lines using Smart Account filters on the Software and Subscriptions Landing Page (SLP). You can also see your Smart Account/Virtual Account details in the Smart Account/Virtual Account column, the last column on SLP search results.

7. To export your Smart Account/Virtual Account from SLP, select your lines and click the Export option.
8. Within the Quoting page, you can filter your lines based on your **Smart Account** details or if your line requires Smart Account, **Smart Account Required**, under Line Type filter. Your Quoting export will also have Smart Account/Virtual Account details.

9. Refer to the **Search, Filter and Sort Quick Reference Guide** for details on Filters.
5 Smart Account in Contract Administration

You can add or edit End Customer, Holding and/or Partner Smart Accounts to your Add to Contract ($0, Non $0) transactions.

**Note:** If there is no request line in quote where service entitlement party is Bill-To, then Partner Smart Account option will not show up.

1. To add a Smart Account to the Add to Contract transaction at the header level, click **Assign Smart Account** in the quote header. You can also add it in the line.

   ![Add to Contract](image)

2. The process of adding different types of Smart Account in the header remains similar to the quoting flow. Refer section **Adding a Smart Account section** for details.

3. Alternatively, to edit your Smart Account details from your line, refer **Smart Account Operations** for details.

**Note:** Assign/edit Smart Account functionality for other Contract Management transactions is not available, but for transactions like Contract Move, Swap Serial/Instance Number and Link Minor to Major transactions, implicit Smart Account inheritance is enabled.
## Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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<tr>
<td>Active (Contract Status)</td>
<td>A contract that is current and enabled for TAC support.</td>
</tr>
<tr>
<td>Expired (Contract Status)</td>
<td>An expired contract status is 30 or more days after the contract ended. No TAC support.</td>
</tr>
<tr>
<td>Overdue (Contract Status)</td>
<td>A contract that has ended but is within the 30-day grace period and enabled for TAC support.</td>
</tr>
<tr>
<td>Signed (Contract Status)</td>
<td>A contract that has not started.</td>
</tr>
<tr>
<td>Terminated (Contract Status)</td>
<td>A contract that has been terminated on request from Partner/Customer. No TAC support.</td>
</tr>
<tr>
<td>Co-Term</td>
<td>Aligning the end date of a line in the quote with the end date of an existing contract. Also referred to as End-Date Alignment.</td>
</tr>
<tr>
<td>GU ID (or GU Name)</td>
<td>Global Unique Identifier (The GU ID is the data point used in Cisco’s records to associate all branches of a corporation to a common, overarching entity)</td>
</tr>
<tr>
<td>Host ID</td>
<td>Host ID is an unique identifier for a particular device. For a SW Subscription line, the Host/Mac ID is the HW device on which the subscription is installed and registered with Cisco via SWIFT portal.</td>
</tr>
<tr>
<td>Instance Number</td>
<td>Unique identifier for a Product in Install Base record can be used similar to serial numbers and will apply to both Serialized and Non-Serialized products</td>
</tr>
<tr>
<td>MAC ID</td>
<td>Media Access Control ID is a unique identifier assigned to network interfaces for communications on the physical network segment.</td>
</tr>
<tr>
<td>PAK</td>
<td>Product Authorization Key</td>
</tr>
<tr>
<td>PO Number</td>
<td>Purchase Order Number</td>
</tr>
<tr>
<td>Product Number</td>
<td>The unique name Cisco uses to identify the product also referenced to as Product SKU or License name for subscriptions</td>
</tr>
<tr>
<td>Service Choice</td>
<td>Cisco covers many levels of service. This specifies which level is being obtained</td>
</tr>
<tr>
<td>SKU</td>
<td>Stock-Keeping Unit. A unique identifier for each distinct product and service that can be purchased in business.</td>
</tr>
<tr>
<td>SO Number</td>
<td>Sales Order Number</td>
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