Standard Partner Holding Smart Account Structure

Best Practices
What is a Partner Holding Smart Account?

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.

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

Assign to Reseller’s existing Holding Smart Account

Reseller will move order to Customer Smart Account

Request Customer Smart Account on Customer’s behalf

Assign to existing Customer Smart Account

Request Customer Smart Account on Customer’s behalf

1T Partners

Distis/2T Partners

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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
Small or Medium Business Company
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

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

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

KEY:
Global or Regional (International) Company
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

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

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

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Global or Regional (International) Company

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

1-Tier Partner ordering scenario
Check slide #2 for 2-Tier Partner ordering scenario
Global or Regional (International) Company

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

End Customer / Smart Account Information Unknown

B2B Order will be automatically assigned to the default Holding Account.

Identify End Customer and / or help Customer setup account

Move order from your Holding Account to Customer Smart Account in CCW

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

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Global or Regional (International) Company

Ordering Process before B2B Integration (before implementing SA attributes)

1. Cisco Software Central
   - Create a Partner Holding Smart Account in Cisco Software Central.

2. Cisco Commerce (CCW)
   - Set up a default Partner Holding Smart Account in CCW.

3. B2B system
   - Create and submit an order in B2B

4. B2B system
   - The B2B Order will be automatically assigned to the default Partner Holding Smart Account (and Default VA).

5. Cisco Commerce (CCW)
   - Go to CCW and search for submitted the Order.

6. Cisco Commerce (CCW)
   - Re-assign the order from Global VA (Default VA) to Regional VA within the Partner Holding Smart Account.

7. Cisco Commerce (CCW)
   - Re-assign the order from the Regional VA to the Customer’s Smart Account.
Global or Regional (International) Company
Ordering Process for a 1-Tier Partner

1. Cisco Software Central
Create a Partner Holding Smart Account in Cisco Software Central.

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

3a. Cisco Commerce (CCW)
If the Customer is known, assign directly the Customer Smart Account. Optional: associate your Partner Holding Account.

3b. Cisco Commerce (CCW)
If the Customer or Customer's SA is unknown, assign your Partner Holding Smart Account. Request SA for your Customer in CCW.

4. Cisco Commerce (CCW)
Submit the order.

5. Cisco Commerce (CCW)
Go to CCW and search for submitted the Order.

6. Cisco Commerce (CCW)
Move the order from Partner Holding Smart Account to the Customer Smart Account.

4. Cisco Commerce (CCW)
Submit the order.
Global or Regional (International) Company
Ordering Process for a 2-Tier Partner

1. Cisco Software Central
   Create a Partner Holding Smart Account in Cisco Software Central.

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

3a. Cisco Commerce (CCW)
    Assign to the Reseller’s Partner Holding Smart Account.

3b. Cisco Commerce (CCW)
    Request Partner Holding Smart Account on Reseller’s behalf from CCW.

4. Cisco Commerce (CCW)
   Submit the order.

5. Cisco Commerce (CCW)
   Go to CCW and search for submitted the Order.

6. Cisco Commerce (CCW)
   Move the order from Reseller’s Partner Holding Smart Account to the Customer Smart Account.

7a. Cisco Commerce (CCW)
    Assign to existing Customer Smart Account.

7b. Cisco Commerce (CCW)
    Request Customer Smart Account on Customer’s behalf.
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 [Implementation Guidelines](#) for ordering that include information about Smart Licensing.

- For more information about the Smart Account attribute on Quoting punch-out (cXML), check these [Implementation Guidelines](#) 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

Q2O Process – Options for B2B Partners

Create a Holding Smart Account in Cisco Software Central.

Set up a default Holding Smart Account in CCW.

Have you implemented the Smart Account attribute on Quoting punch-out?

Yes

No

Have you implemented the 3A4 Smart Account attribute?

Yes

No

Smart Account Mandatory SKU (e.g., Smart License): Required to assign a Smart Account to deliver licenses to Customer

Smart Account Optional SKU (e.g., PAK): Assignment to SA is optional (but recommended).

Assign a Smart Account on Quote. SA assignment will carry over to the Order.

Have you implemented the 3A4 Smart Account attribute?

Yes

Assign a Smart Account directly on the B2B Order.

No

The B2B Order will be assigned to your default Holding Smart Account.

Re-assign the Order to the End Customer's Smart Account in CCW.

Submit the Order with the Smart Account assignment carried over from Quote.

You can edit the Smart Account assignment before Order submission.

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 (Y); 3A4 (N) → Select Smart Account on Quote, then transfer to Order and submit 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 (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.

**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.

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

Examples of Partner Roles that should have access to the Partner Holding Account:

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

*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 * (e.g., business line, product family, department, region, country, etc.) to allow separate access/visibility to different purchasing departments and post-sales departments.