How to Associate a Sales Order to a Smart Account

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Prerequisites

Before you start, ensure that you have the following data at your disposal:

- An active Cisco.com account

Associating a Sales Order to a Smart Account

Option 1: Assign a Smart Account while you are entering initial order details.

Note: By assigning at the header level of the entire order, all licenses in your order will be assigned to the same Smart Account.

Step 1:

Go to Cisco Commerce Workspace and log in with your Cisco.com account.
Step 2:
From the menu bar, select **Orders**, and then **Create Order**.

Step 3:
On the **Create an Order** page, select whether you want to continue with or without a deal ID. Click **Continue**.

**Note:** For the purpose of this scenario, the **Without a Deal ID** option is selected.

Step 4:
On the **Create Order** page, fill in all the mandatory fields, and then click **Continue**.
Step 5:
In the **Smart Account** section of the order, click **Assign Smart Account**.

Step 6:
In the **Assign Smart Account** dialog box, on the **End Customer Smart Account** tab, enter **Domain Identifier** or **Email ID** of the End Customer Smart Account. Additionally, if applicable, select a Virtual Account. Click **Assign**.

**Note**: You can also assign a Partner Holding Account on the **Smart Account Types** tab. Partners use this account if the customer does not have a Smart Account. Partners can then request a Smart Account for them by clicking the **Request New Holding Account** button.
**Note:** In the **Suggested Smart Account for End Customer** section, you can see suggested Smart Accounts based on the End Customer information you entered.

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**Step 7:**

Once the assignment process is complete, you can continue with the normal ordering process.

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**Option 2: Assign a Smart Account while you are adding licenses and license stock-keeping units (SKUs) to an order.**

**Note:** By assigning at the header level, all licenses within the order will be assigned to the same Smart Account. By assigning at the line item level, individual Smart Accounts can be assigned to individual licenses within the order.

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**Step 1:**

On the **Orders** tab, click **Items** and add your licenses by typing **License ID** or **SKU** in the search bar, chose the **Quantity**, and select **Add**.

**Step result:** The system displays the added licenses in the list at the bottom of the page.
Step 2:

You can assign a Smart Account in two ways:

1. At the header level by clicking **Assign Smart Account** at the top of the page. **Step result:** The system assigns all of the licenses to the same End Customer Smart Account or Partner Holding Account that you selected.

2. At the line item level by selecting the **Items** tab, and then clicking **Assign Smart Account** for each license. **Step result:** The system assigns the individual licenses within the order to different Smart Accounts.
Step 3:

In the Assign Smart Account dialog box, on the End Customer Smart Account tab, enter Domain Identifier or Email ID of the End Customer Smart Account. Additionally, if applicable, select a Virtual Account. Click Assign.

**Note:** You can also assign a Partner Holding Account on the Smart Account Types tab. Partners use this account if the customer does not have a Smart Account. Partners can then request a Smart Account for them by clicking the Request New Holding Account button.

**Note:** In the Suggested Smart Account for End Customer section, you can see suggested Smart Accounts based on the End Customer information you entered.

Step 4:

Once the assignment process is complete, you can continue with the normal ordering process.