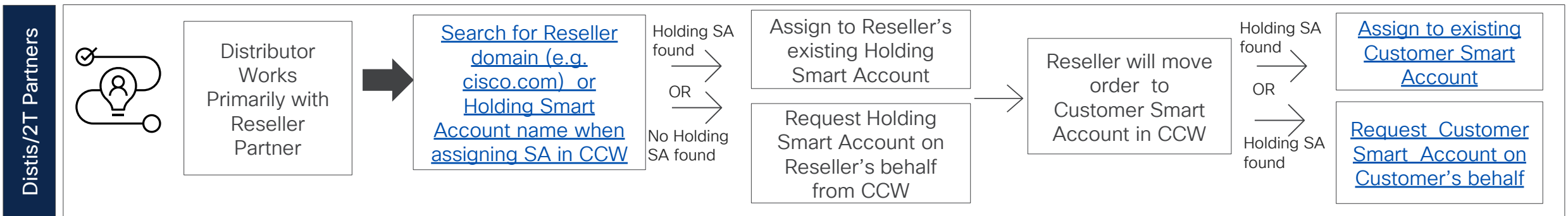
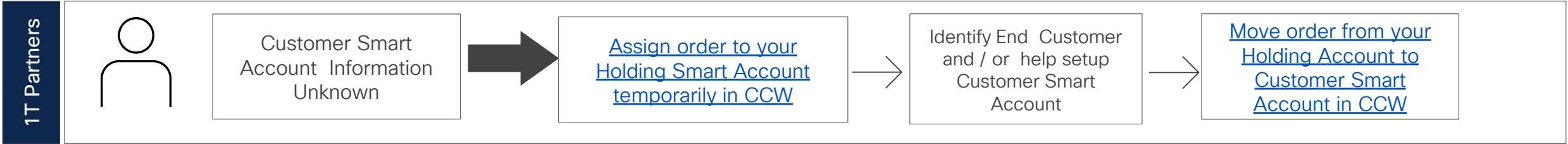
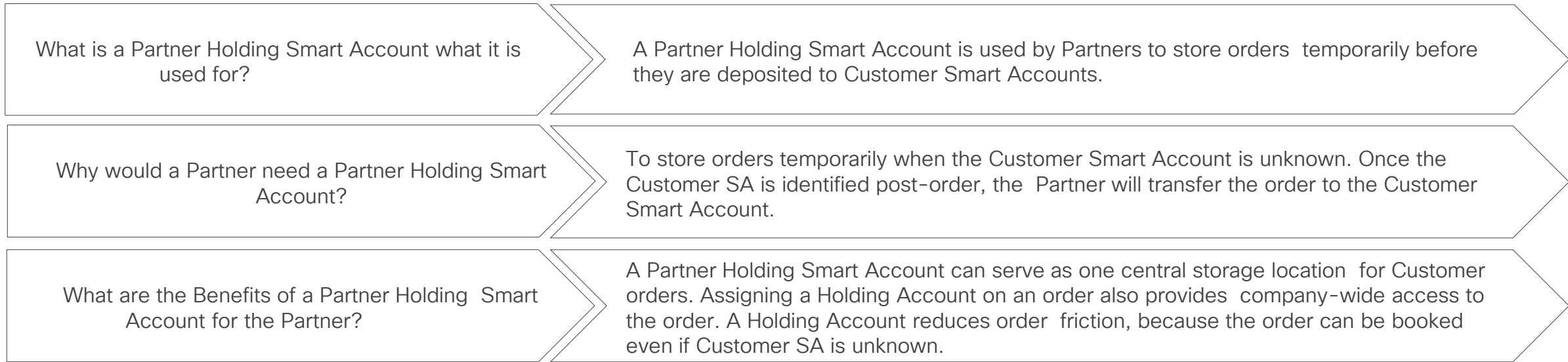




# Standard Partner Holding Smart Account Structure

Best Practices

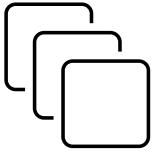
# What is a Partner Holding Smart Account?



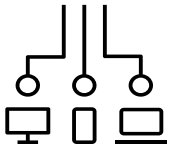
# General Best Practices - Recommendations



- 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 Customer Smart Account is unknown at the time of order, the Partner Holding Smart Account provides the ability to temporarily deposit Cisco Software orders until the 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:

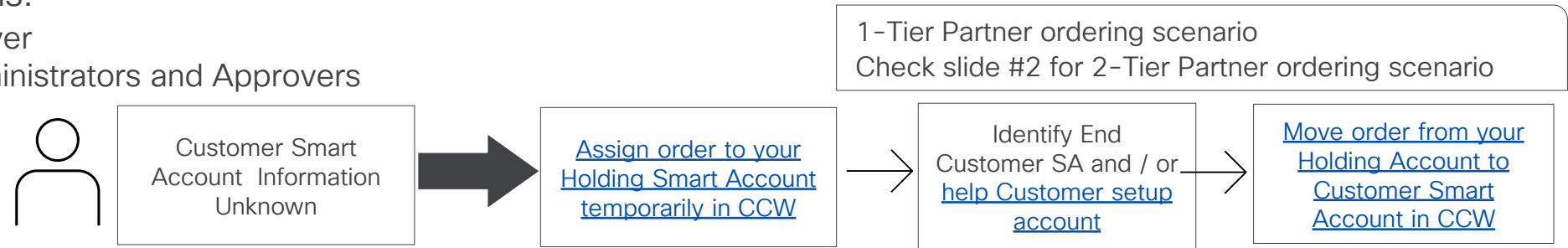
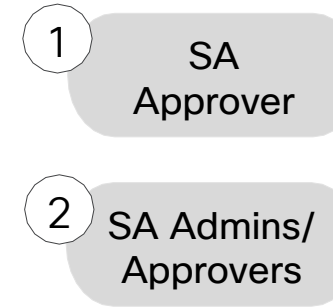
- 1 Virtual Account (Default)

## Structure of Virtual Accounts:

- N/A (Centralized Procurement)

## Number of Users/ Admins:

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



# 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:

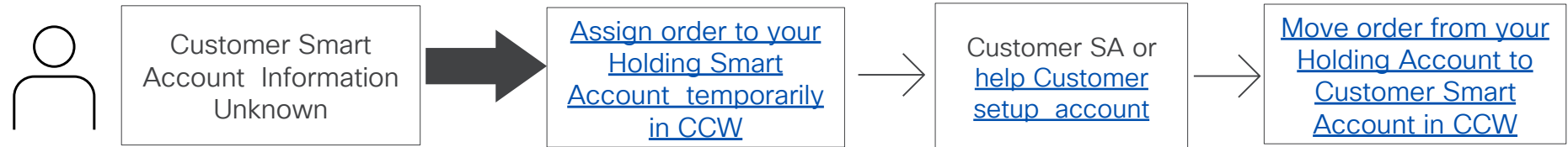
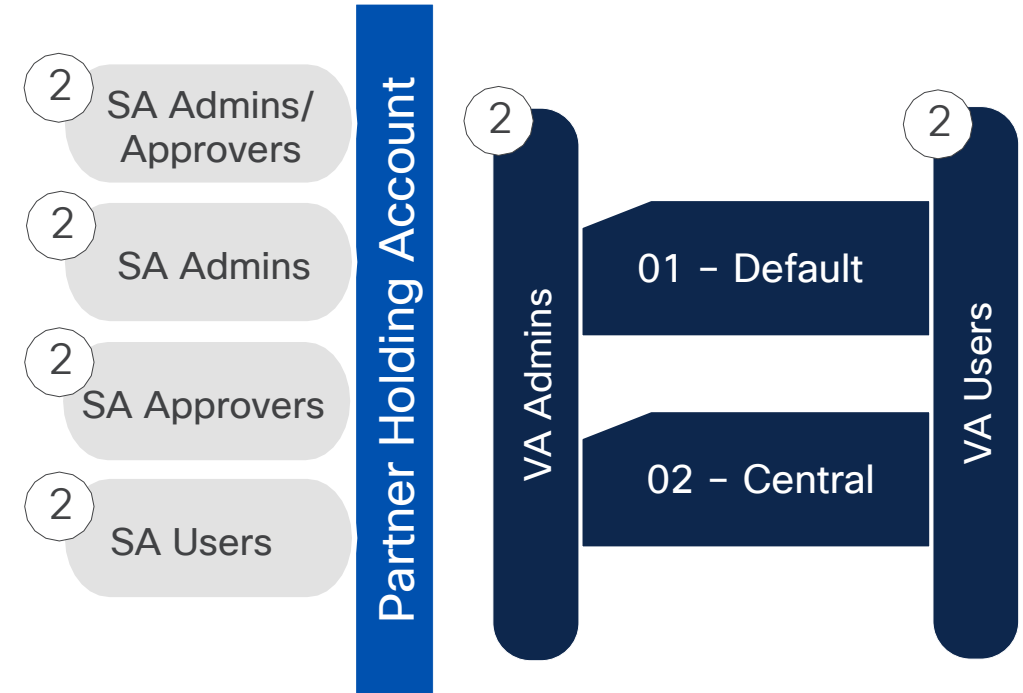
- 2 Virtual Accounts (one Default and one additional)

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



KEY:

Partner Holding Account

Virtual Account

SA Role

VA Role

# 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:

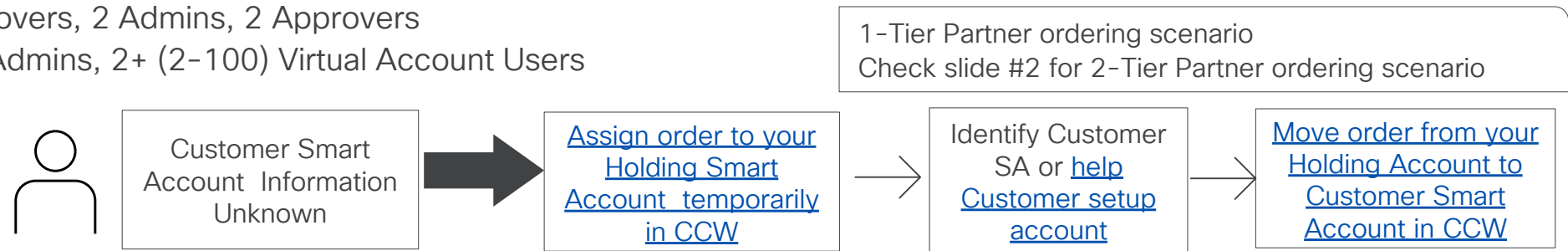
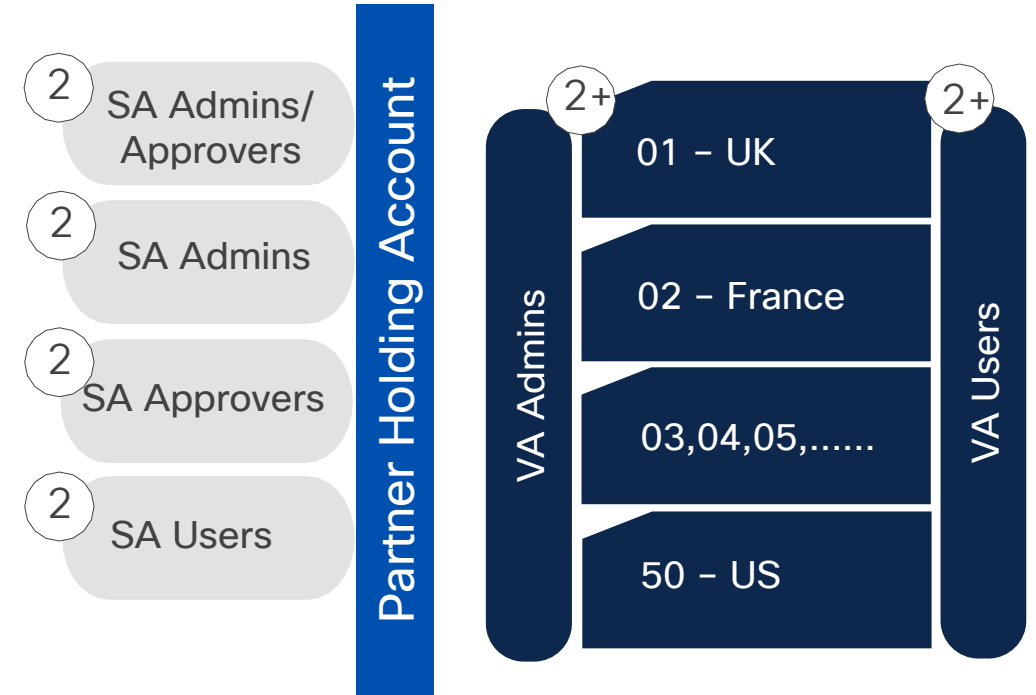
- 2-100 Virtual Accounts (as many as the local Purchasing Departments)

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



# 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:

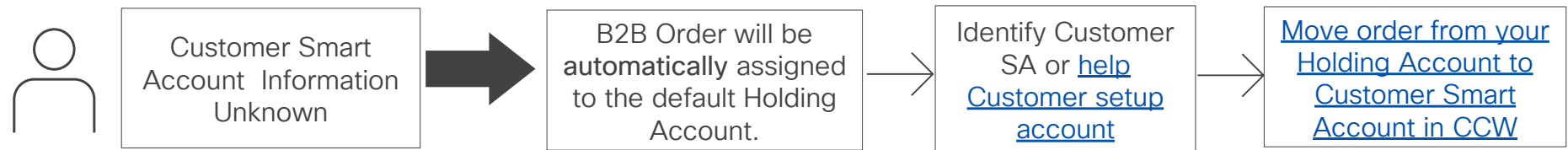
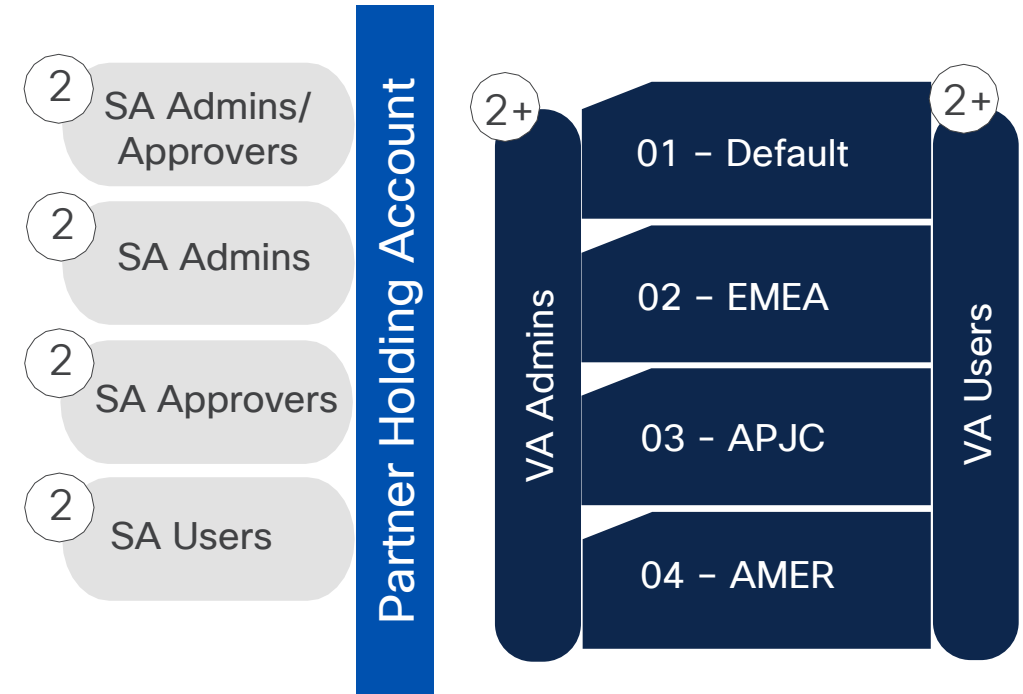
- 2+ Virtual Accounts (as many as the Purchasing Departments).

Structure of Virtual Accounts:

- by Location (City, Country, Region)

Number of Users/ Admins:

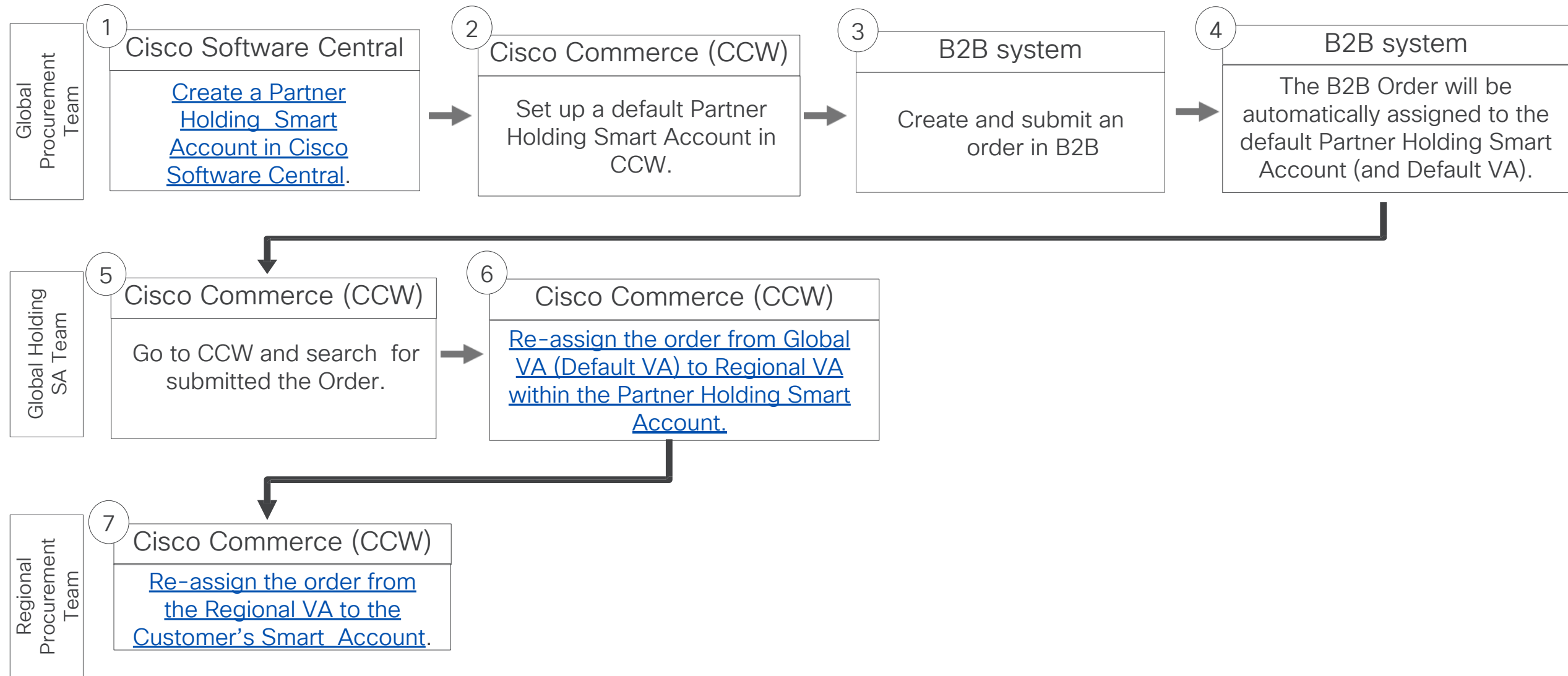
- 2 Smart Account Approvers, 2 Smart Accounts Admins and Approvers
- 2+ (2-100) Virtual Account Admins
- 2+ (2-100) Virtual Account Users
- 2 Account Users



# Global or Regional (International) Company

B2B Partners

Ordering Process before B2B Integration (before implementing SA attributes)

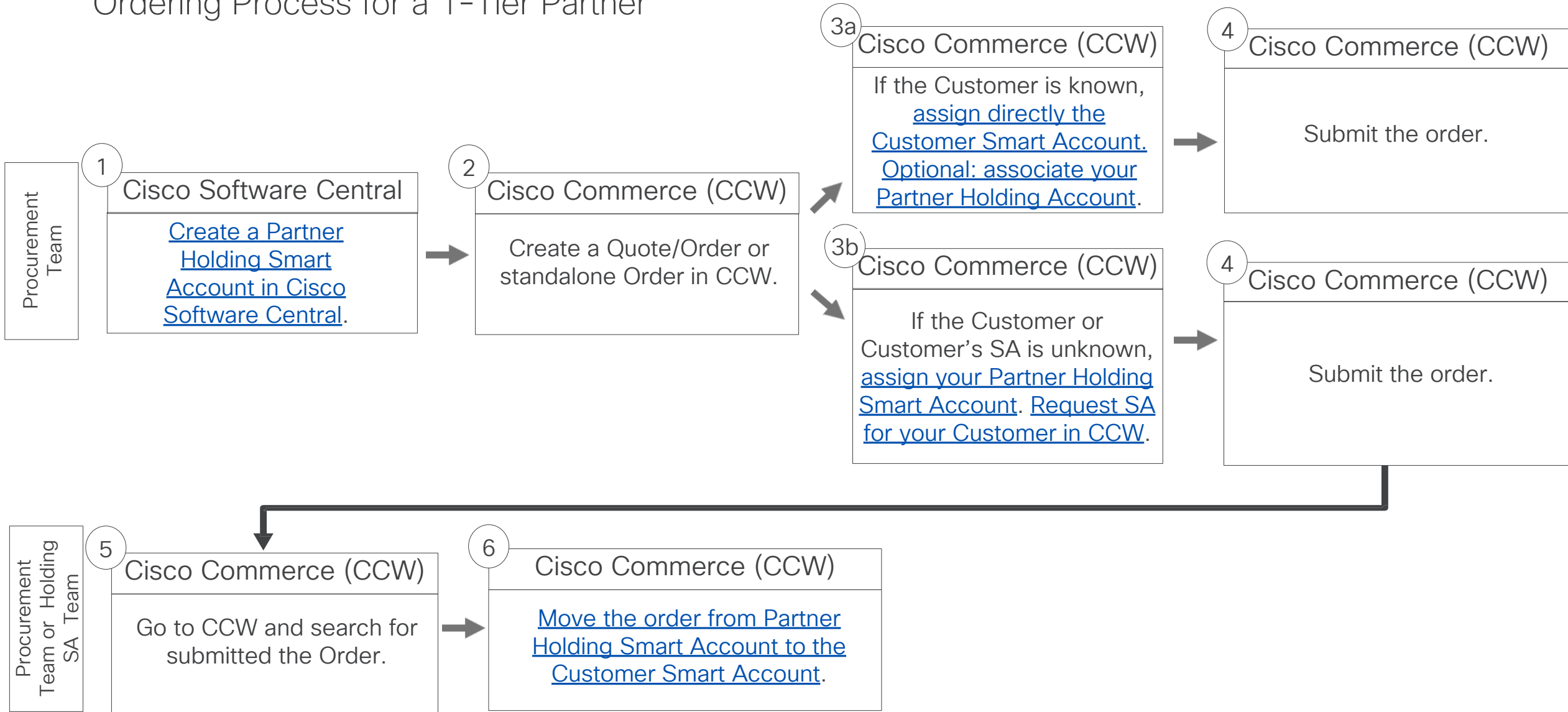




# Global or Regional (International) Company

1-Tier Partners

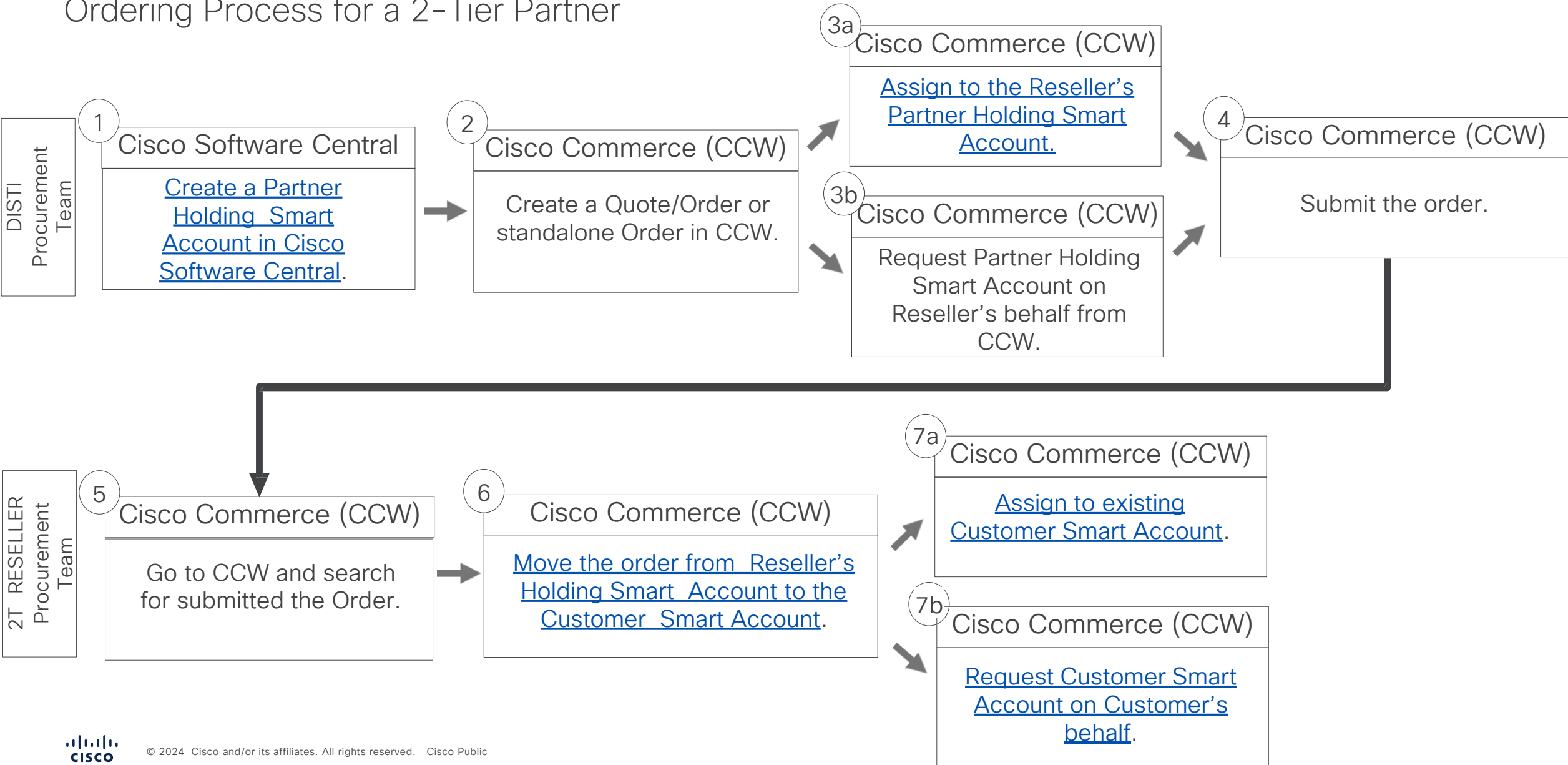
## Ordering Process for a 1-Tier Partner



# Global or Regional (International) Company

Distributors and 2-Tier Resellers

## Ordering Process for a 2-Tier Partner



# 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



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).

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

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

Have you implemented the 3A4 Smart Account attribute?



Have you implemented the 3A4 Smart Account attribute?

C

Assign a Smart Account directly on the B2B Order.

Yes

No

D1

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

Yes

No

A

You can edit the Smart Account assignment before Order submission

B

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

D2

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

A

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.

B

B2B Quoting Punch-Out (Y); 3A4 (N) → Select Smart Account on Quote, then transfer to Order and submit the Order.

C

B2B Quoting Punch-Out (N); 3A4 (Y) → Assign Smart Account at the time of order and then Submit the Order.

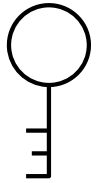
D

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 Customer Smart Account.



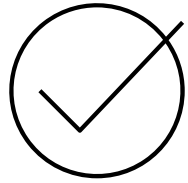
# How Partner Internal Roles can be mapped to Holding Account Roles

# Smart and Virtual Account User Roles



## Smart Account Administrator

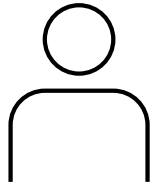
Edit Smart Account properties, add and edit users and Virtual Accounts, view event logs, and manage licenses for the entire Smart Account.



## Smart Account Approver

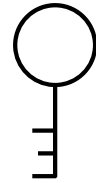
Edit Smart Account properties, view all users, and view event logs. Approvers cannot manage licenses.

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



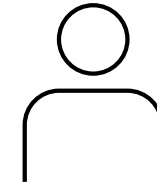
## Smart Account User

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



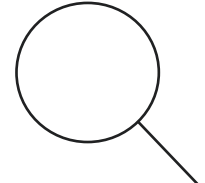
## Virtual Account Administrator

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

- ① 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 Customer 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