

How Can I Assign an Order to a Smart Account?

Contents

For External Customer / Partner Use Only: These instructions are provided to help customers / partners perform the action themselves to resolve the issue. If the customer / partner runs into issues in the instructions, please have them open a case with licensing support (<https://www.cisco.com/go/scm>) to help resolve. Please **DO NOT** perform these actions yourself if you are an internal Cisco resource outside of the Licensing Support team.

Before you start, ensure that you have:

- An Active Cisco.com account
- The User must have access to the order in CCW

Step 1: Go to [Cisco Commerce Workspace](#) and log in with your Cisco.com credentials.

Step 2: In the Global Search, search with the Sales Order Number or Web Order Number to which a Smart Account needs to be assigned.

Step 3: From the search results, click on the Sales/Web Order number to view order details.

Step 4: Click on "View or change Smart Account Assignments" link present in the banner message displayed at the top of the page.

Step 5: Click on Assign Smart Account.

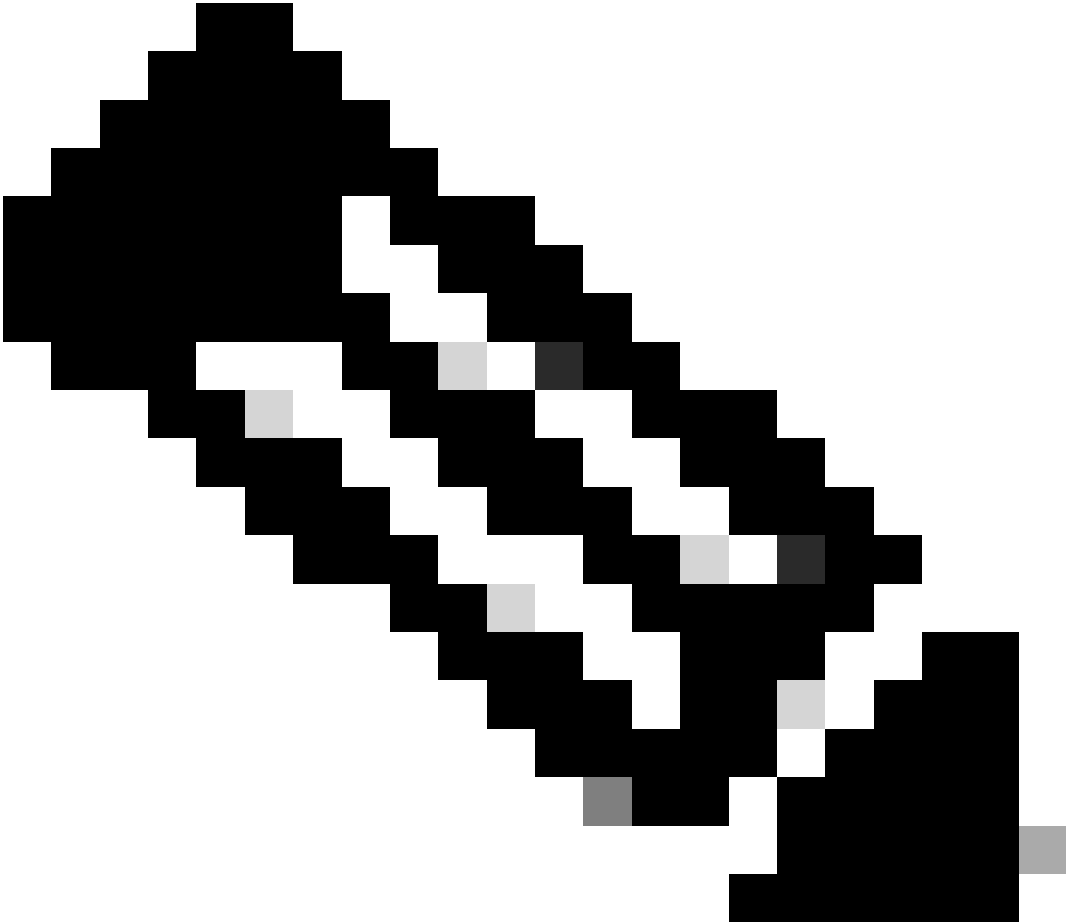
Step 6: In the "Select an Existing Account" dropdown, select a search parameter. The options are Domain Identifier/Account Name/Email ID. Then search for the Smart Account.

Step 7: Select the desired Smart Account from the search results.

Step 8: Select an appropriate Virtual Account from the "Virtual Account Name" field and click Assign button.

Step 9: Select the checkbox to accept the terms of use and click on Submit button.

Step 10: Finally, click on "Yes" to submit the change.



Note: Internal users must open a case with the Licensing support team for getting the orders assigned to a smart account. There are no checks in place for internal users having access to post sales page to restrict unauthorized movement of orders.

Troubleshooting:

1. I have changed /assigned the SA, but my licenses are still not in the smart account. Please check if:

- The orders are shipped (license will be transferred once the orders are shipped confirmed).
- Smart account is active (check with support team if the SA is in pending status).
- Orders are stuck in export hold.

2. I am a partner and I need to get the order moved from my holding account to my end customer account. Partners can assign license orders from Partner Holding Accounts to your Smart Account in Cisco Commerce (CCW).

Partner Holding Accounts are accounts that let users temporarily hold orders for Smart Account enabled products until your Smart Account is identified. Entitlements are not available in a Partner Holding Account.

Smart Licensing entitlements can only be viewed or managed in your Smart Account. For assigning the smart account, please repeat the process steps.

3. I am not able to see the assigned SA/VA in CCW-R portal for a given WO#. Complete process steps 1-4 to view SA/VA assignment in CCW.

If you experience an issue during the assignment of Smart Account, open a case in [Support Case Manager \(SCM\)](#).

For feedback on the content of this document, please submit [here](#).