



Frequently Asked Questions Mandatory Smart Account Assignment at Quote

For Partners and Distributors

Mandatory Smart Account Assignment

SMART ACCOUNT MANDATE CHANGE	1
ASSIGNING THE CORRECT SMART ACCOUNT	3
SPECIFIC SCENARIOS	4
STOCKING ORDERS	5

SMART ACCOUNT MANDATE CHANGE

Q: What is changing?

A: Cisco initiated a policy on September 13 that requires identification or initiation of Smart Account (SA) assignment for Deals/Quotes, as a means to improve license delivery and velocity for our customers. Before this change, inconsistency and a lack of enforcement in Smart Account Assignment across partners and distributors caused up to 20% of licenses to age in holding accounts, leading to sub-optimal license delivery.

Policy enforcement was originally scheduled for October 25, but additional time was provided to prepare for system adjustments, based on feedback from partners and distributors. The policy is currently being monitored without impact to the Deal/Quote flow.

January 4 will mark the revised implementation date, and the scope of this change has been modified.

Effective Jan 4, 2021, Partners (excluding Japan) are required to assign end customer Smart Account on deals only if:

- Partner opens an approved deal and adds a product requiring Smart License
- Partner initiates a Transactional Re-usable Non-Standard Deal (RNSD)

Q: Why is Cisco making Smart Account mandatory during Deal/Quote?

A: The change responds to an effort to improve license delivery and velocity to your End Customers. Smart Accounts help reduce the risk of loss of licenses and gives customers

timely access to activate and adopt software. They also provide better visibility into license owner and consumption which is key for addressing renewal opportunities.

Q: How is this process different from the existing process? What needs to be done as part of the new process?

A: This is more of a behavioral change. Today, you can assign a Smart Account to Quote/Deal but it is not mandatory. After January 4, Cisco Commerce will require the user to assign Smart Account for all Transactional Re-usable Non-Standard Deals, quote lines which has Smart Account as mandatory. The user will **NOT** be able to submit the quote for approval unless the Smart Account is assigned for the required quote lines.

Q: Does this change affect all licenses irrespective of license type (Classic, Smart, Hybrid etc.)?

A: This change applies for all RNSD Transactional Deals.

Q: Is OBA or “Delegate to Someone Else” an option to complete assignment?

A: No. “Delegate to Someone Else” is not an option at this point. Assigning Smart Account is the only option at Quote.

Q: Will this change have any impact to approved deals?

A: No. There will be no impact for the quotes which are already approved.

Q: What about when re-opening an approved deal?

A: No impact will occur when a RNSD Transactional Deal quote is reopened, and it has Smart Account lines which already converted to Order. On the other hand, if the RNSD Transactional Deal quote has Smart Account lines which are not converted to Order, Smart Account assignment will be required.

Q: Does this change apply to inflight quotes which are not submitted?

A: Yes. After January 4, all inflight quotes for RNSD Transactional Deals which are not submitted will need End Customer Smart Account, or you won't be able to submit the Quote.

Q: Does this change have any impact to quotes which are approved or when approval is in progress?

A: No. This change will not impact the quotes which are approved or when approval is in progress.

Q: Will Cisco have exceptions for scenarios where the process can proceed without providing a Smart Account? What would be that exception process?

A: No exceptions will be provided as Smart Account is requirement for all RNSD Transactional Deal quotes.

Q: Will holding accounts be decommissioned?

A: Partner Holding Account will not be decommissioned but the Partners will only need to assign a Smart Account during quoting. Assigning Partner Holding Account is optional.

Q: How does this change impact hunting, if it is a new client without Smart Account? Does this mean we can put anything in that looks "close" to get approval and lock others out of the incentive?

A: You can search for the Customer Smart Account using the domain identifier or with the contact email address. If you do not find the Smart Account, you can request a new End Customer Smart Account to be created on behalf of the Customer during the quoting process.

Q: The New Smart Account Creation functionality can be accessed directly through the CCW User Interface. Will this functionality block the Deal/Quote?

A: No, a new Smart Account can be created on the fly during quoting process and it can be assigned to the quote even when pending.

Q: If a Smart Account has not yet been approved but created, can it be assigned?

A: Yes. Pending Smart Account can be used for assignment.

ASSIGNING THE CORRECT SMART ACCOUNT

Q: Can I assign a Partner Holding Account during the quoting process?

A: You can assign Partner Holding Account during quoting process, but Smart Account assignment is required for quote submission.

Q: Can I assign a Pending Smart Account?

A: Yes. Pending Smart Account can be assigned during quoting.

Q: How do I know which one is the correct Smart Account to assign?

A: When assigning Smart Account, the one you choose should belong to the legal entity that is making the purchase. Said in another way, the party who will take ownership as a result of the sale.

Q: Does the End Customer Smart Assignment flow into the order when only Selected Items from the Quote are converted to an order?

A: Yes, it will flow.

Q: Will I be able to look up a Smart Account in the CCW workspace at the time of Quote / Deal?

A: Yes, the same type-down search you can use today will be available in the Quote/Deal tab of CCW.

Q: What do I have to do if my End Customer does not have a Smart Account?

A: You can request for a new Smart Account on behalf of a Customer in CCW Smart Account Selection Screen. Once the Smart Account terms are accepted by the end Customer, the Smart Account is set up and licenses from the order will be deposited.

Q: I know my End Customer has a Smart Account, but I don't know it. How can I find it?

A: The Smart Account search capability will allow you to search for the Customer Smart Account. Most of the time the domain identifier for the End Customer is commonly the same extension on their email address.

Q: What happens if I mistakenly choose the wrong Smart Account?

A: The licenses will be deposited into the assigned Smart Account. Moving licenses between different Smart Accounts requires Cisco intervention. You can open a case via [Support Case Manager](#) to assist with the move.

Q: Can I assign a Smart Account for the whole Quote/Deal or line by line?

A: Yes. The user can assign the Smart Account at the Quote level or line level.

Q: To add or modify a Smart Account, will it be necessary to reopen a deal id?

A: If the deal is approved, they will have to reopen it to change Smart Account Assignment.

SPECIFIC SCENARIOS

Q: Does this change apply if I am skipping Quote/Deal and entering a direct order?

A: No. In this case the current behavior for order entry remains the same.

Q: Do B2B quotes require Smart Account assignment?

A: When B2B Partners punch out to CCW quoting UI and create a RNSD Transactional quote, then Smart Account assignment will be required for the Partners to submit the quote.

Q: Is the new CCW Enhancement integrated with the B2B systems of partners? Or will they continue to default to Partner Holding Account?

A: For B2B Partners Smart Account will also be required at RNSD Transactional Quote and there is a behavioral change for B2B Partners as well. If Partner submits a Deal/Quote with Smart Account assigned and when Quote to Order occurs, then the Smart Account on the Quote will flow to order. This will even apply to Quotes that were converted into B2B orders.

Q: For Distributors DART a Deal ID is generally created. If the Deal ID is created in CCW, will it mandate Smart Account Assignment?

A: Yes, Smart Account Assignment is required for RNSD Transactional Deal quotes.

Q: Partners using Stacking Promos like Opportunity Incentive Program/Teaming Incentive Program will still need to get Account Manager Approval before order loading. This does not use non-standard Deal ID but still goes through an approval process. Will Smart Account Assignment be still mandatory for such Quotes?

A: No, a Smart Account would not be required in this scenario. If the Partner requests Non-Standard discounts for this type of Deal they have to share the End Customer Smart Account with the Account Manager for the quote to be approved.

Q: What about Salesforce created deals? Is there a system enforcement in place to mandate Smart Account Assignment or are we still going to follow the STAR Manual Pilot post Sep 13th?

A: Salesforce deals are being created by calling CCW API itself, so this change will cover Salesforce created deals as well. Salesforce deals created by the Cisco Account Manager will also require Smart Account assignment on the required quote line for Non-Standard and RNSD Transactional Deals.

Q: Is it possible to indicate a different Customer Smart Account (not the one indicated in Deal/Quote) at the time of order booking?

A: Yes, you have up until ship confirm to change the Smart Account.

Q: If the Deal is initiated by Cisco Account Manager instead of partner, will Smart Account assignment be mandatory for our Cisco Account Manager? Will the Partner be able to edit the Smart Account in case it was previously assigned by the Cisco Account Manager?

A: Yes. It is required but you will be able to change it during the ordering process.

Q: Smart Account Assignment is required for all Licenses, is there any technology that is not affected by this change?

A: It will be applicable for all products which has Smart Account as required. The system will inform the user where the quote items will require the Smart Account to be assigned.

Q: Can I re-assign an Order from Smart Account to a Partner Holding Account?

A: Yes. You can add/edit the assignment

STOCKING ORDERS

Q: Do I need to assign a Smart Account for stocking orders where no deal or quote is required?

A: No, a Smart Account not required for stocking orders.

Q: Is placing a hardware stock order with embedded/perpetual licenses possible without indicating Customer Smart Account/Partner Holding Account?

A: Yes. In this situation, a Smart Account is not required.

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09.03.2020

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