How Can I Assign an Order to a Smart Account?

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Prerequisites

Before you start, ensure that you have:

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

Note:

- Please DO NOT perform these actions yourself if you are an internal Cisco resource outside of the Licensing Support team.
- Need help finding your Cisco licenses or order provisioning status? Our 'Find My License' feature in Ask Licensing helps locate licenses across platforms (SSM, LRP, EAWS, etc) and track real-time order status from placement to completion. Visit Ask Licensing for more information.

Steps

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.
- *Once a line has an active ECSA and/or moves to the post-Booked state in commerce, the ability to assign a Smart Account will be disabled.*

Troubleshooting

1. Which smart account/virtual account the given order is Assigned to?
    - Please connect with your Cisco partner and get the information about the given SO in which they assigned to given SA/VA.
    - After partner provide the SA/VA details, follow the steps given below:
    - Go to Cisco Software Central and log in with your cisco.com credentials.
    - Click on “Manage License”
    - Select the smart account, display in the left corner of the screen.
    - Click on “Activity Tab”, and type/provide the Sales Order Number in the input field and click on “Search” icon/button.
    - After following the above step, if the order license is not in given SA, then open a case in Support Case Manager (SCM).

2. I have changed /assigned the SA, but my licenses are still not in the smart account.

The licenses will not in available in the Smart Account for one or more of the following reasons. Please check before opening a case for further support.

- The orders are not shipped (license will be transferred once the orders are shipped confirmed).
- Smart account is not active (The licenses are not available in the Smart Account if the Smart Account is not active. Please open a case with the Support team to check the status of the Smart Account).
- Orders are stuck in export hold (Licenses will be transferred once the export hold is released).

3. 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 follow the above steps.

Note: To assign the order to a Holding Smart Account in case the End Customer Smart Account is not known, then partner can select the Holding Smart Account tab in the Smart Account Assignment pop-up (follow step 1 through 6) and select the Holding Smart Account and Virtual Account from the available options.

4. I don’t have a Smart Account to assign the order, How can I create Smart Account?

Kindly follow the steps provided in the Ask Licensing bot/Support Case Manager Licensing section, under Smart Account Administration>Manage Smart Account> Create Smart Account.

5. To re-assign the licenses, please use Asset Transfer Manager tool.

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.

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.