



Standard Customer Smart Account Structure

Best Practices

Intended Audience: For Internal and External Audiences

April 2024

Small or Medium Business Company

Operating in one Country or State, with Local Presence

Company Type: Small or Medium Business Company operating in one Country or State, local presence

Company Information/Structure: 1 office location

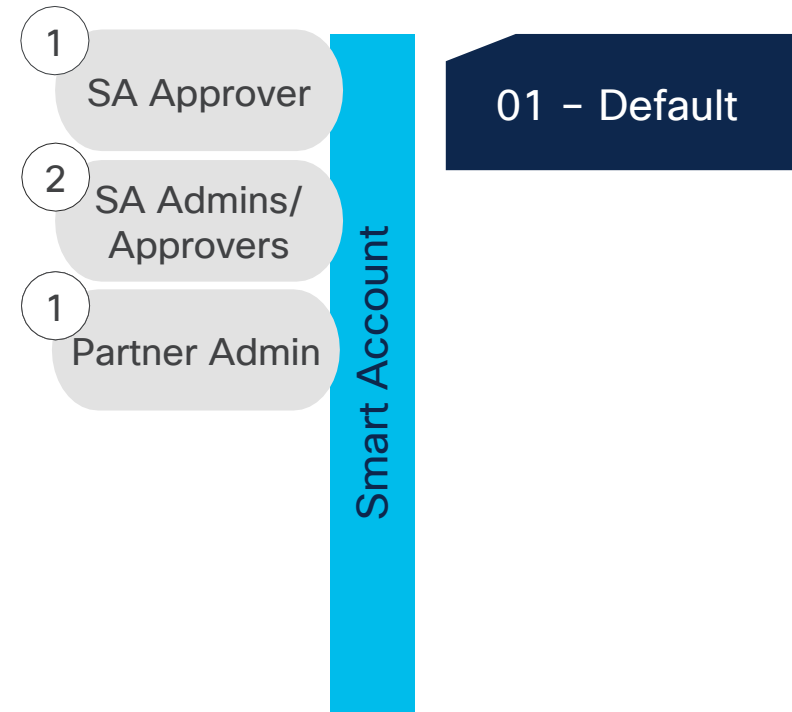
Number of Smart Accounts: 1 Customer Smart Account

Number of Virtual Accounts: 1 Virtual Account (Default)

Structure of Virtual Accounts: N/A

Number of Users/Admins:

- 1 Smart Account Approver
- 2 Smart Account Administrators and Approvers
- Delegate Smart Account access to 1 Partner Admin of choice



Global or Regional Enterprise Company

Global or Regional Presence

Company Type: Regional Enterprise Company
Typical enterprise operating at a global or regional level.

Company Information/ Structure: 20+ locations (offices, production sites or logistic/ distribution sites). Global presence (e.g. Americas, Europe, Asia), or Regional presence (e.g. Europe or US).

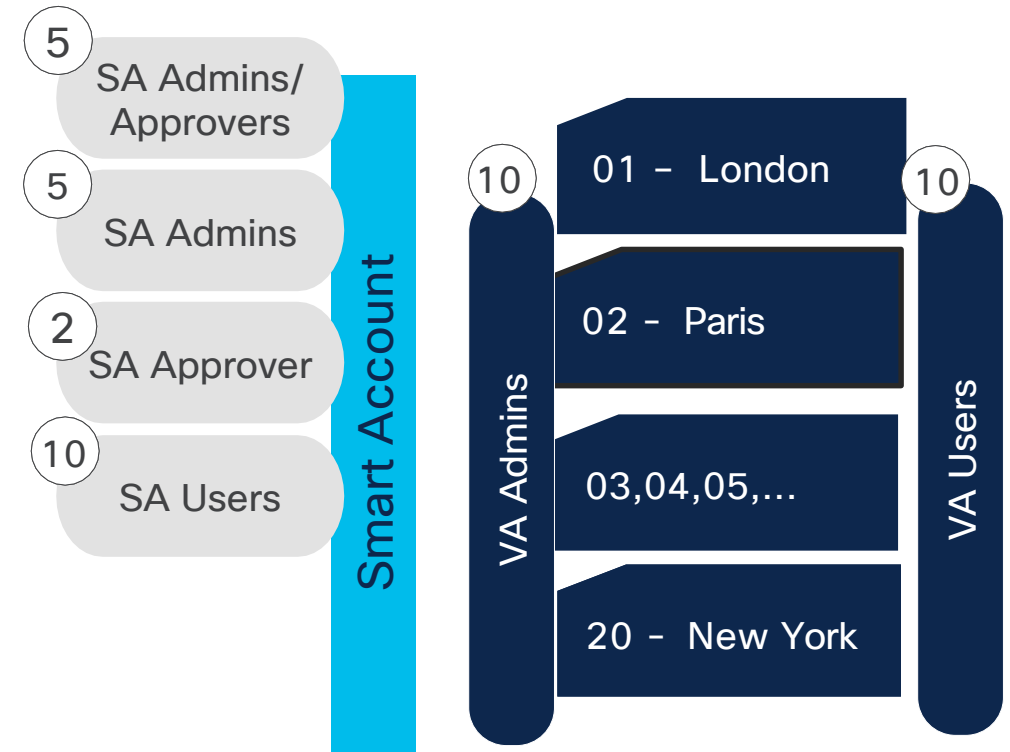
Number of Smart Accounts: 1 Customer Smart Account

Number of Virtual Accounts: 20-60 VAs

Structure of Virtual Accounts: by Location (City, Country)

Number of Users/ Admins:

- 2-5 Account Admins and Approvers, 2-5 Admins,
- 1-2 Approvers
- 5-10 Account Users
- 5-10 Virtual Account Admins, 5-10 Virtual Account Users



Service Provider

Global or Regional Presence

Company Type: Service Provider operating at a global or regional level, providing Internet, Phone and TV services.

Company Information/ Structure: company operating at a global or regional level. Offices in multiple locations.

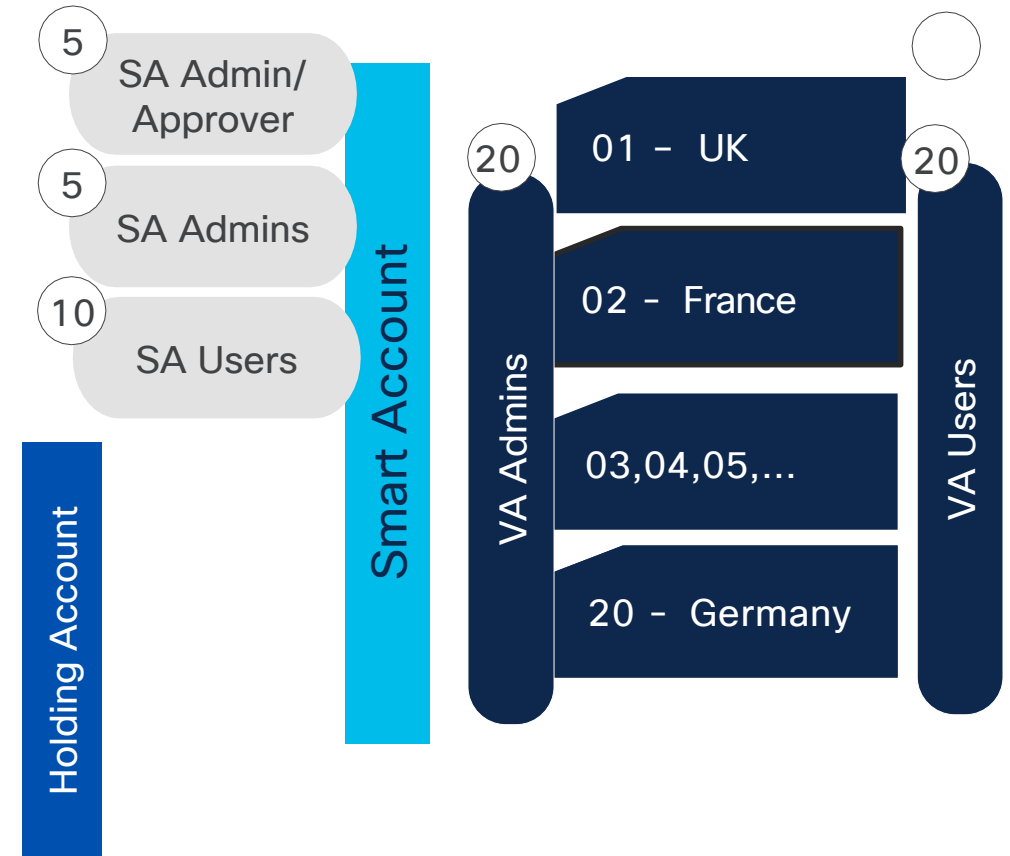
Number of Smart Accounts: 1 Customer Smart Account, 1 Partner Holding Account (only necessary if operating as Reseller).

Number of Virtual Accounts: 20-100 VAs

Structure of Virtual Accounts: by Country, City, Metropolitan Area, Department, Business Line, another organizational unit.

Number of Users/ Admins:

- 2-5 Account Admin and Approver,
- 2-5 Account Admins, 2-10 Account Users,
- 10-20 Virtual Account Admins
- 10-20 Virtual Account Users



Regional IT Services Company

Regional Presence

Company Type: Global or Regional IT Services Company

Company Information/ Structure: 1-5 offices in a specific Region (e.g. North America or Europe)

Number of Smart Accounts: 1 Customer Smart Account, 1 Partner Holding Account (only if operating as Reseller)

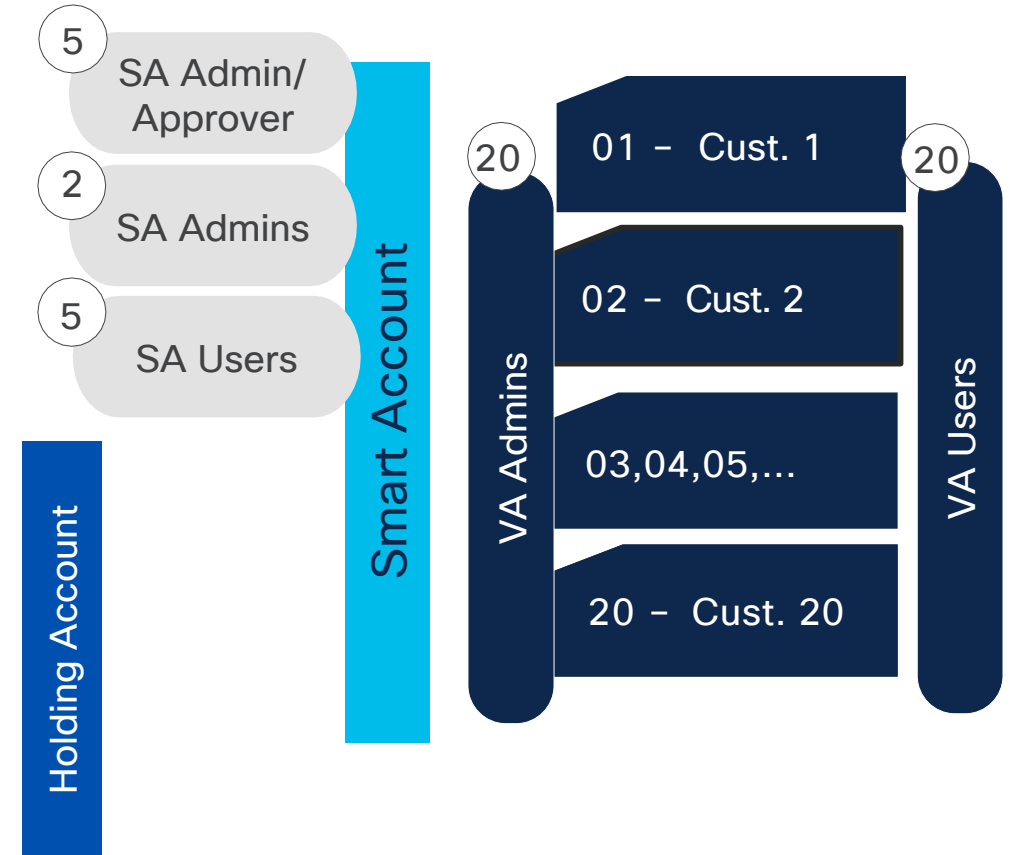
Number of Virtual Accounts: 20-25 VAs

Structure of Virtual Accounts:

by End Customer Company, or by location (City, Metropolitan Area).

Number of Users/ Admins:

- 2-5 Account Admins and Approvers
- 1-2 SA Approvers
- 2-5 Account Users,
- 2-5 Virtual Account Admins
- 2-5 Virtual Account Users



Cloud Services Company

Global or Regional Presence

Company Type: Cloud Services Company

Company Information/ Structure: 5+ global (or regional) locations (ex. in the Americas and/or in Europe).

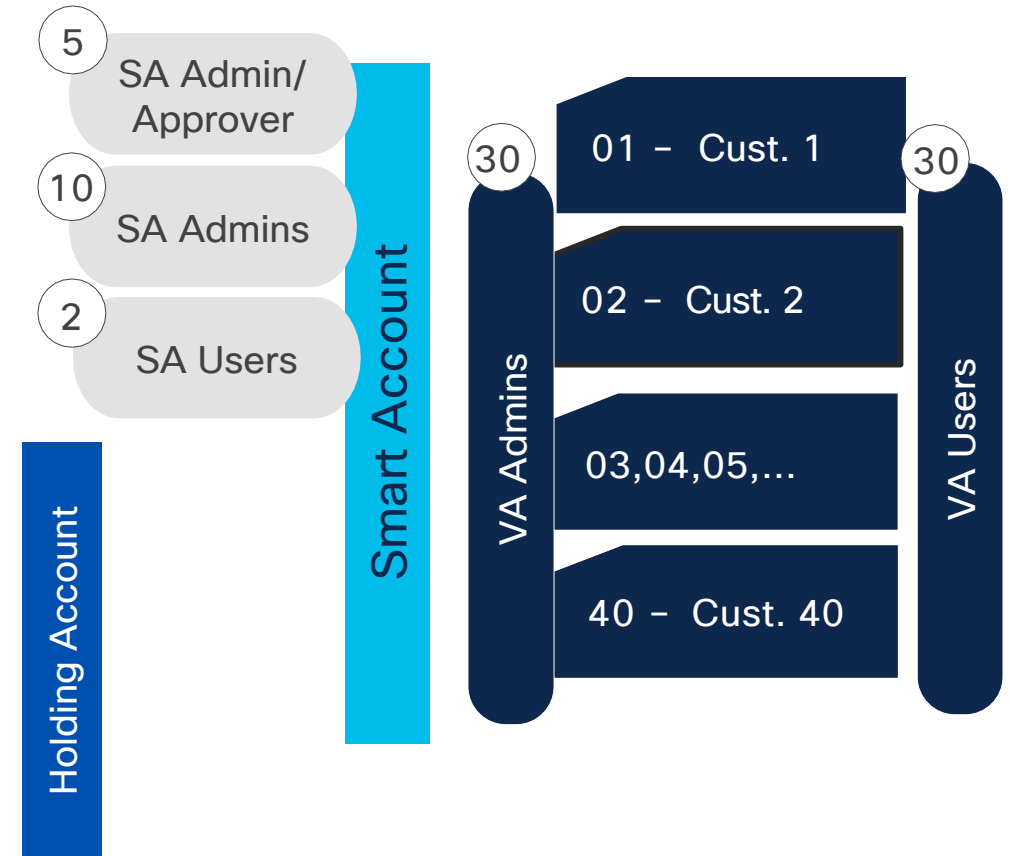
Number of Smart Accounts: 1 Customer Smart Account, 1 Partner Holding Account (only if operating as Reseller)

Number of Virtual Accounts: 40-80 VAs

Structure of Virtual Accounts: by End Customer Company

Number of Users/ Admins:

- 2-5 Account Admins and Approvers
- 2 Account Approvers
- 2-10 Account Admins
- 20-30 Virtual Account Admins
- 20-30 Virtual Account Users



Public Sector: Regional / National Department of IT

Region, State, Country

Company Type: Public Sector – Regional Department of IT

Company Information/ Structure: Regional or National Department of Information Technology

Number of Smart Accounts: 1 Customer Smart Account

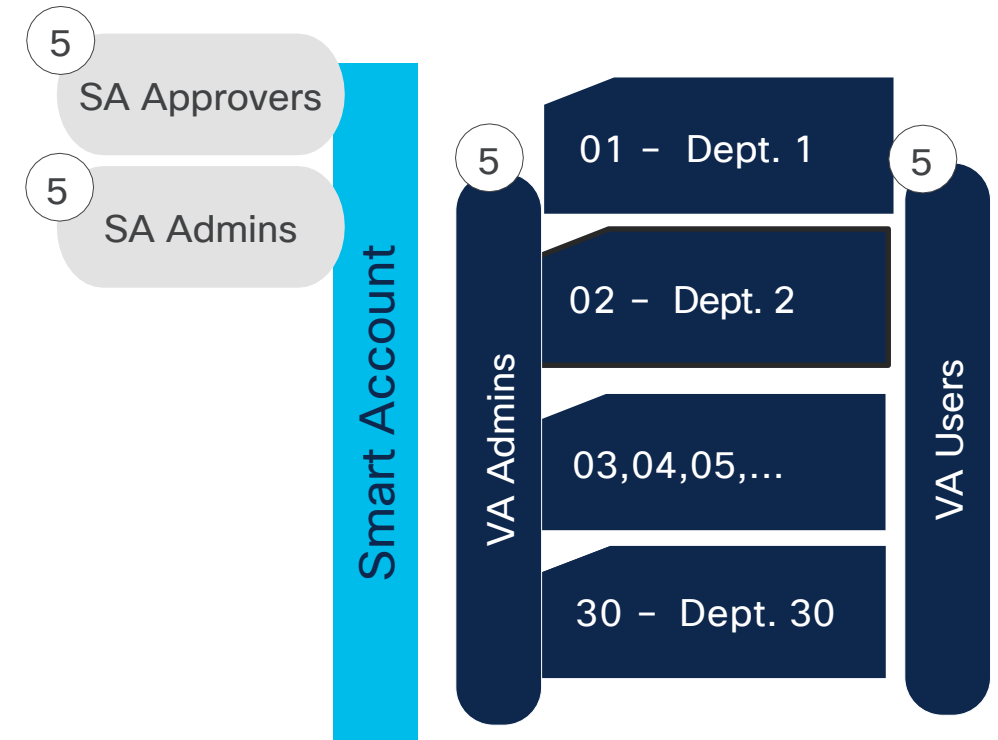
Number of Virtual Accounts: 20-30 VAs

Structure of Virtual Accounts:

by Department (of Commerce, of Environment, of Education, of Transportation, etc.)

Number of Users/ Admins:

- 2 Account Approvers
- 5 Account Admins
- 2-5 Virtual Account Admins
- 2-5 Virtual Account Users



Public Sector – Military

Region, State, Country

Company Type: Public Sector – Military

Company Information/ Structure: Military

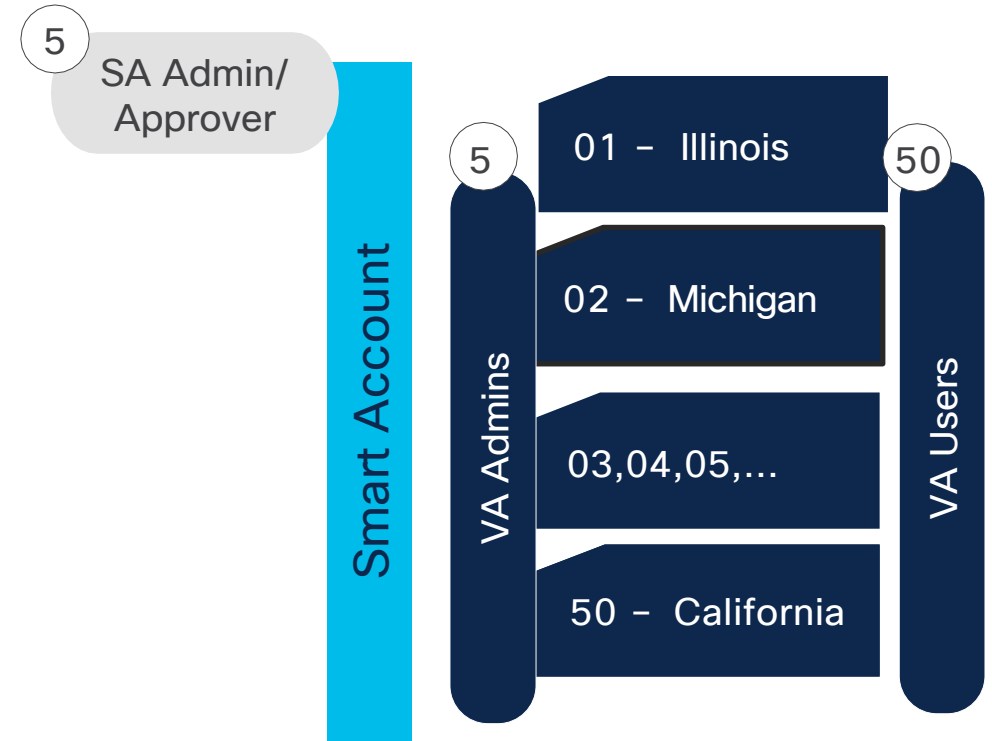
Number of Smart Accounts: 1 Customer Smart Account

Number of Virtual Accounts: 50-100 VAs

Structure of Virtual Accounts: by State, Region or City

Number of Users/ Admins:

- 2-5 Account Admins and Approvers
- 2-5 Virtual Account Admins
- 20-50 Virtual Account Users



Global Business Process Services

Global Presence

Company Type: Global Leader in Business Process Services

Company Information/ Structure: Global leader for business process outsourcing services.
10+ locations (10+ countries) and delivery centers.

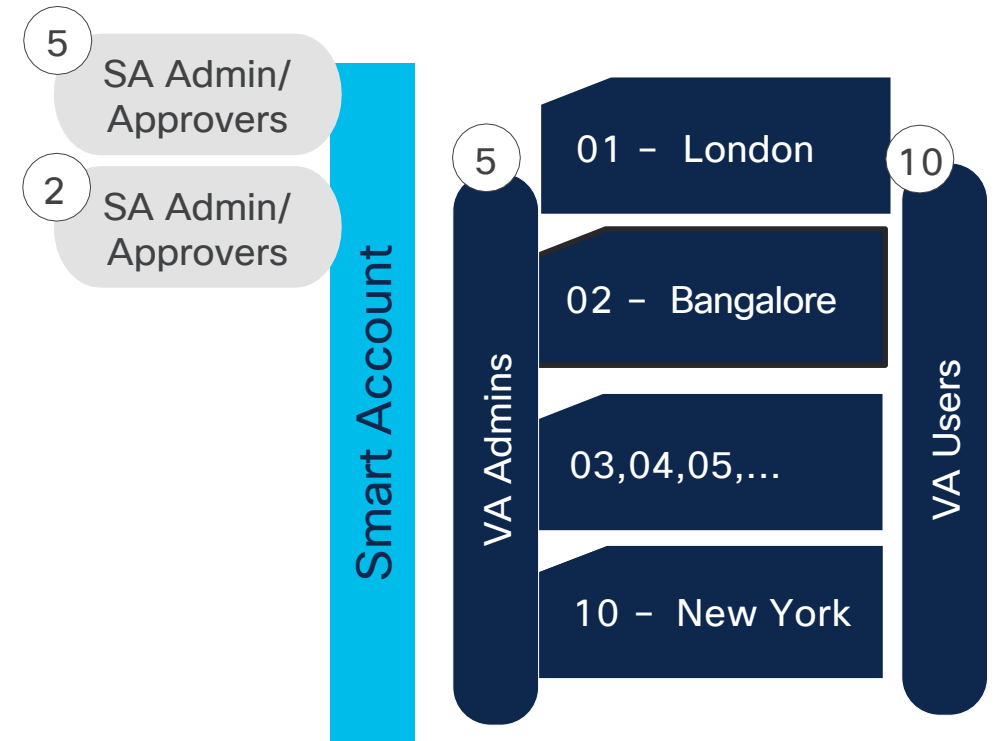
Number of Smart Accounts: 1 Customer Smart Account

Number of Virtual Accounts: 10-50

Structure of Virtual Accounts: by City, globally (cities in the US, Mexico, LATAM, India, Europe).

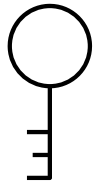
Number of Users/ Admins:

- 2-5 Account Admins and Approvers
- 2 Account Approvers
- 5-10 Virtual Account Admins
- 5-10 Virtual Account Users



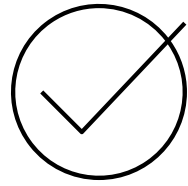
Smart Account Roles

Smart and Virtual Account User Roles



Smart Account Administrator

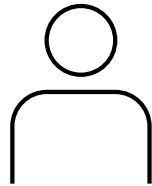
Edit Smart Account properties, add and edit users and Virtual Accounts, view event logs, and manage licenses for the entire Smart Account.



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.



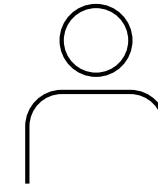
Smart Account User

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.

How Partner and Customer Internal Roles can be mapped to Smart Account Roles

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 End Customer's 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.

Customer Smart Account – Roles

Access to Customer Smart Account and Customer Roles Involved

- 1 The access to the Customer Smart Account provides the following options:
 - License Management in SSM, LRP, EA Workspace (for Users and Admins)
 - Smart Account Administration: Users, Virtual Accounts, Agreements (for Admins)
- 2 Examples of Customer Roles that should have access to the Customer Smart Account:

Customer Role	Customer Function	Smart Account Role* (Global Role)	Virtual Account Role* (Local/Dept. Role)**
License Management Specialist	Person managing licenses in SSM, LRP and EA Workspace.	Smart Account User	Virtual Account User
License Management Supervisor	a)Person managing the Smart Account: accepting the Smart Licensing Agreement, adding/deleting Users, adding/deleting Virtual Accounts. b)Person supervising the team of License Management Specialists and/or managing licenses in SSM, LRP and EA Workspace.	Smart Account Admin	Virtual Account Admin
Systems Engineer	Person who configures (registers) products in SSM.	Smart Account User	Virtual Account User
Purchasing Specialist or Manager	Person purchasing licenses from Cisco or the Partner. May need to verify that the licenses purchased are available in the Smart Account. May need to check if there are license shortages and purchase more licenses if needed.	Smart Account User	Virtual Account User
Legal Department Specialist or Manager	Person from the legal department in charge of accepting the Smart Licensing Agreement. This role can also edit account properties. No access to SSM, EA Workspace, LRP.	Smart Account Approver	N/A
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 Customer may want separate Virtual Accounts to segment licenses by Organizational Unit * (ex. business line, product family, department, region, country, etc.) and/or to allow separate access control to different sets of licenses.



The bridge to possible