



The bridge to possible

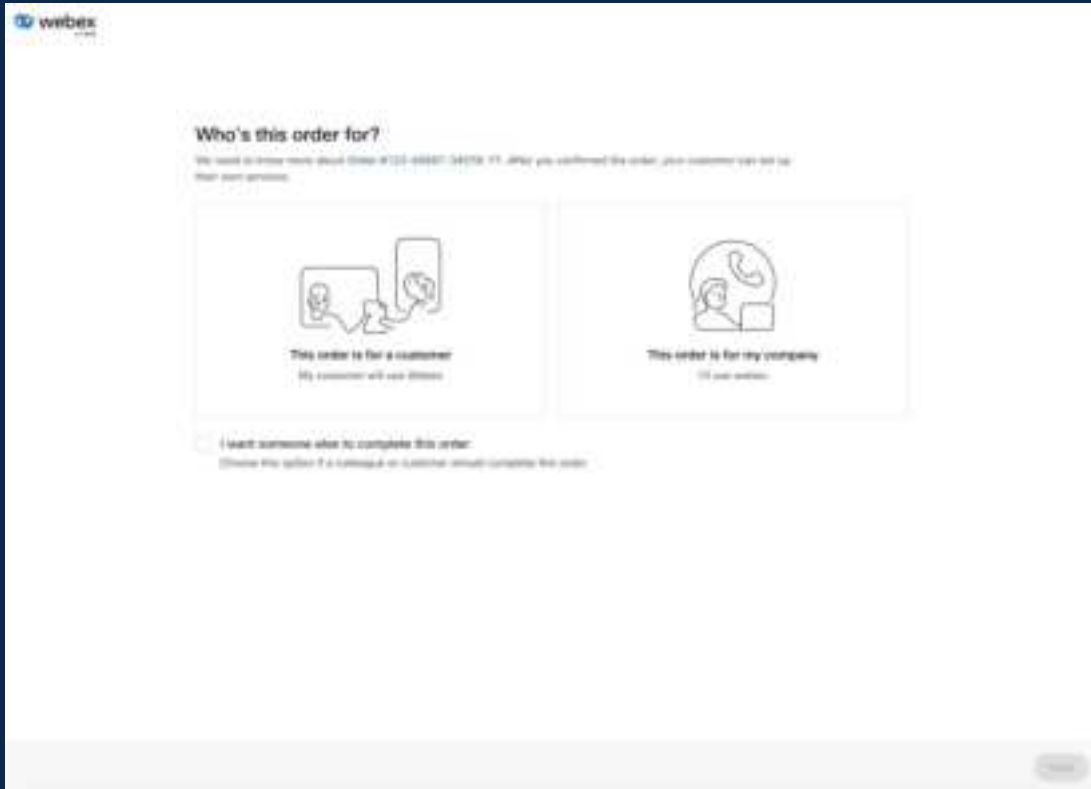
Webex Control Hub (WCH) : Provisioning Wizard

July 2022

Contents

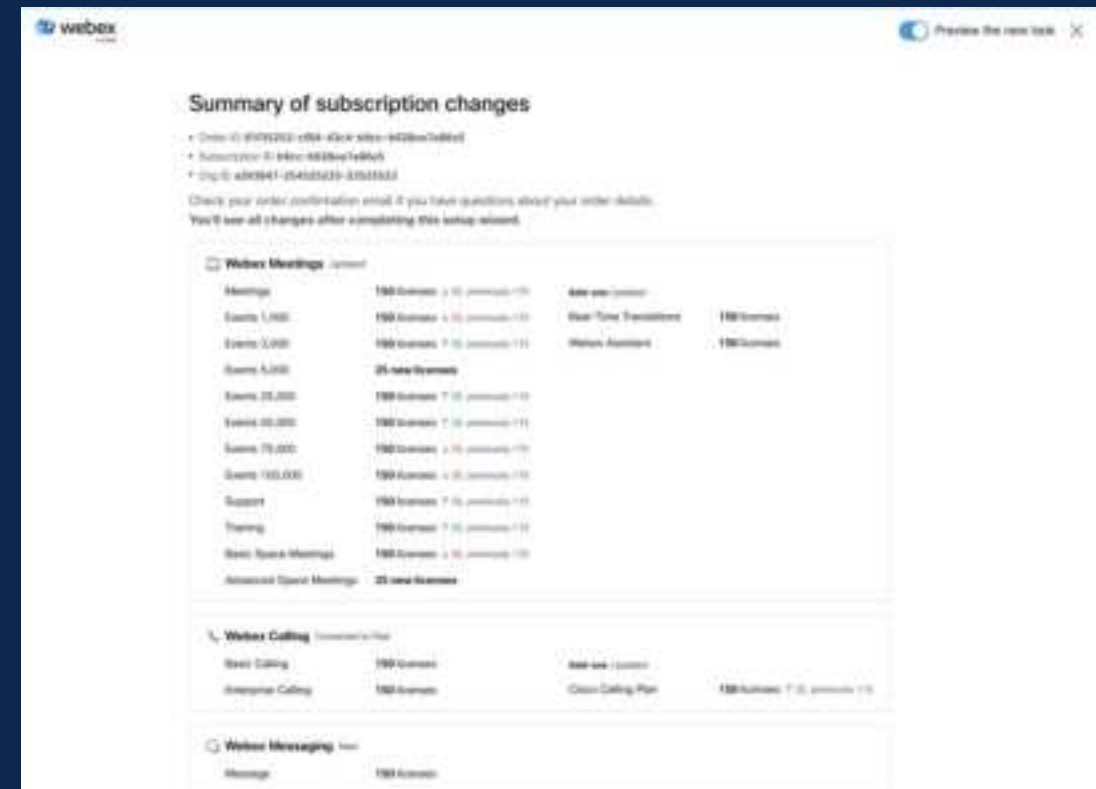
- Highlights of the new experience
- Step-by-step: Organization finder
- Step-by-step: Service setup
- Resources

Terminology: Two Parts



Organization Finder

Identifies the right person + org to complete provisioning



Service Setup

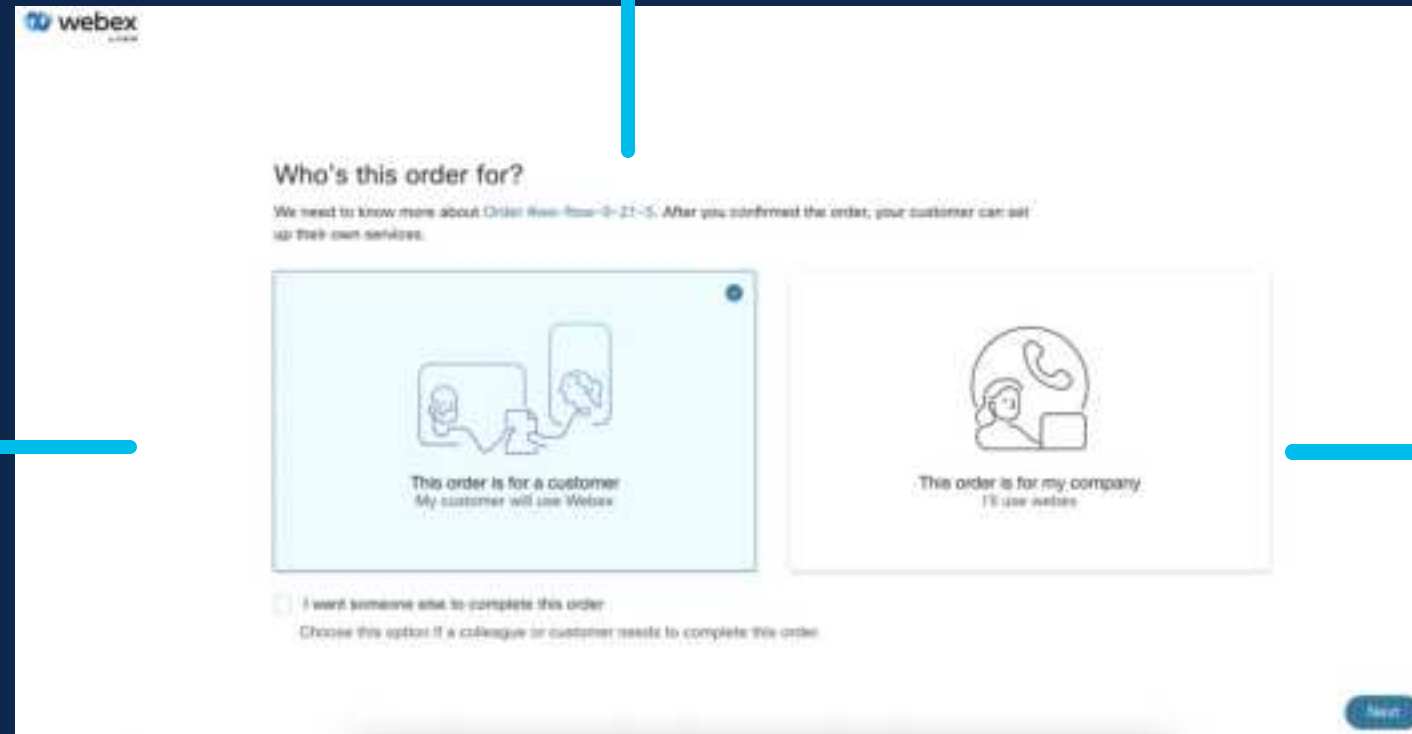
Collect essential provisioning parameters to spin up services + provision licenses

Highlights of the New Experience

User-centric Prompt

Preview the order content
This link will give a sneak-peak of
subscription overview (first page of service
setup)

Removing “I am a
partner”
By asking about the
intent of the order,
there is no need to
understand ‘partner’ or
‘customer’ terminology



The image shows a Webex order form titled "Who's this order for?". It includes a link to a subscription overview and two main options: "This order is for a customer" and "This order is for my company". A third option at the bottom allows for someone else to complete the order.

webex

Who's this order for?

We need to know more about Order #123456789. After you confirm the order, your customer can set up their own services.

☒ This order is for a customer
My customer will use Webex

☐ This order is for my company
I'll use webex

☐ I want someone else to complete this order
Choose this option if a colleague or customer needs to complete this order.

Next

For internal use
NFR subscriptions for
partner orgs can be
accommodated through
this option

Identify the right Organizations

Iterate quickly

Have a few addresses that could belong to the customer?

Quickly see if they have an existing org through a global domain-based search

Active vs stale orgs

This field captures the most recent activity across users in the org

webex

Partner Information — Customer Information — Verify — Done

Enter an email to find your customer's organization

Charley@circle.com Search

We found matching organizations. Learn more about choosing the correct one. If you don't see your organization on this list, you can also create a new organization.

Circle & Co. Organization ID: 12486343-2323-2342342-2342432 Managed by you Suggested

These suggestions are based on the email address and organization's status.

Domains	
Verified domains	Ac**com, Ac***test.com
Claimed domains	Ac**com, Ac***test.com
Users	
Active users	100
Full administrators	Aditya Agarwal, Carolyn Kremer, Erica Hernandez, Sandy Chow, Dorothy Hollfield
Last user activity	1/2/21, 10:39 PM
Subscriptions	
Active trials	No
Active subscriptions	1
Other information	
Country or region	United Kingdom
Account created	6/4/16, 10:04 PM

☐ Circle Inc. Org ID: 12486343-2323-2342342-2342432

☐ Circle LLC Org ID: 12486343-2323-2342342-2342432

Step through the pages
Skip to any previous screens by clicking on the header. Your inputs won't be lost when you return

Org recommendation
Sometimes, an org will stand out above the rest as a potential match. That org will be marked as 'suggested'. (more details in following slides)

Review before proceeding

Review the orgs
If you feel unsure about the org, you can go back and search for the right one.

Connect Acme Industries to Circle
Subscription ID: 123456-789010-234567

By connecting these two organizations you are certifying that you are legally allowed to be the partner for this customer. Please you certify that this is correct you will be unable to change organization for this order. **Only submit if you want to verify this is correct.**

Partner
Provisioning administrator

Customer

Acme Industries
Org ID: 8765432-1098765-4321098765

Circle
Org ID: 9876543-2109876-5432109876

View details

Domains	
Verified domains	Acme.com, Acme.co.uk
Claimed domains	Acme.com, Acme.co.uk

Users	
Active users	100
Full administrators	Johny Appleseed, Corbin Fennel, Eric Hernandez, Sandy Choo, Stanley Hallowell
Last user activity	12/27, 10:28 PM

Subscriptions	
Active seats	50
Active subscriptions	1

Other Information	
Country or region	United Kingdom
Account created	2/4/16, 10:04 PM

Back **Submit**

Know your rights
Provisioning an order to an existing org will mean that the partner will have the 'provisioning admin' role.

Step-by-step: Organization Finder

Receive the Provisioning email

On the customer's requested start date, receive this email.

The email is sent to the 'provisioning contact' when placing the order.

If you haven't received this email, check the spam folder. Otherwise, contact Cisco ordering support team/XaaS helpdesk team.

Next step, set up your service.

Order woid-rm-test-1
Subscription Sub-rm-test-1
End Customer Atlas_Test_ordersimp_RM Test Customer

This is a reminder that you have not set up your services yet. Please note that this is a necessary step without which the services you have purchased will not be available for use.

Your subscription starts and is eligible to be invoiced on the earlier of (i) 20 days from the date of this email or (ii) the date any portion of the subscription is provisioned by Cisco. Please use the link/button below to provide the required provisioning information right away so that you will have use of the subscription for the full term.

Do not forward this email. If you would like to delegate provisioning to someone else, please click the "Set up your service" button below and enter their email in the wizard.

[Set up your service](#)

Get started with the Organization finder

This portion of the first-time setup experience is meant to assist with:

1. Finding the right person who can complete the order
2. Finding the right Control Hub organization for both partner and customer
3. Navigate to the services setup once steps 1 and 2 are complete



Who's the Order for?

It's important to first identify who the order is for. Here's how you can select the right option:


If you are a partner that ordered Webex for a customer, then select 'This order is for a customer'

If you are a partner that ordered Webex for your own company, select "This order is for my company"*


If you are a customer that ordered Webex (e.g., from a partner), select 'This order is for my company'

Who's using Webex?

We need to know more about Order #123-4567-34567-77. After you confirmed the order, someone else can set up services.



This order is for a customer
My customer will use Webex.



This order is for my company
I'll use Webex.

☐ I want someone else to complete this order.
Choose this option if a colleague or customer needs to complete this order.

Option 1: This order is for a customer

If you are not the right person to provision this order, you can provide your colleague's email. They will then receive the same provisioning email.

If you used a mailer alias as the provisioning contact, it's best to provide a real user email at this time. Provide the user's email in 'colleague's email address' field.

If you want the customer to provision this order, you can do so by selecting 'my customer will provision this order'. But you will **not** gain access to their Control Hub once provisioning is complete.

Who's using Webex?

We need to know more about [Order #BXSTW-CCCR-1](#). After you confirmed the order, your customer can set up their own services.

This order is for a customer
My customer will use Webex

This order is for my company
I'll use Webex

☒ I want someone else to complete this order.
Choose this option if a colleague or customer needs to complete this order.

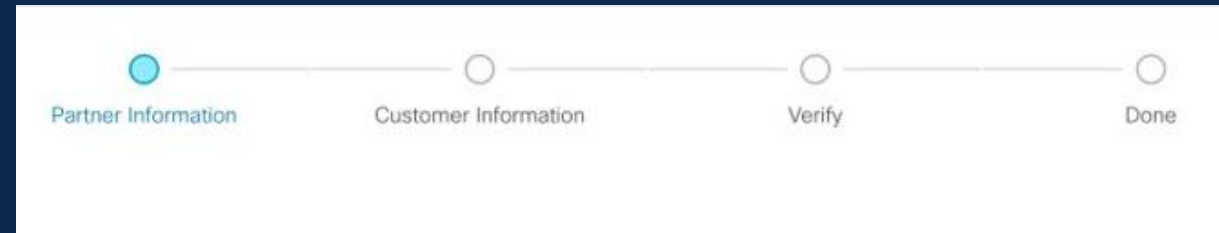
☒ My colleague will provision this order.
Colleague's email address:

☐ My customer will provision this order (not recommended)

Option 1: This order is for a customer

This option will involve the following:

- Identify the Partner org
- Identify the Customer org
- Verify and submit (and continue to service setup)




Option 2: This Order is for my Company

If you are not the right person to provision this order, you can provide your colleague's email. They will then receive the same provisioning email.


If you used a mailer alias as the provisioning contact, it's best to provide a real user email at this time. Provide the user's email in 'colleague's email address' field.

Who's using Webex?

We need to know more about [Order #woofee-00001-1](#). After you confirmed the order, your customer can set up their own services.



This order is for a customer
My customer will use Webex.



This order is for my company
I'll use Webex.

☐ I want someone else to complete this order.
Choose this option if a colleague needs to complete this order.

Option 2: This Order is for my Company

This option will involve the following:

- Identify my Organization
- Verify and submit (and continue to service setup)



A horizontal progress bar with three steps. The first step, 'My information', is highlighted with a blue circle and is the current active step. The second step, 'Verify', is represented by an empty circle. The third step, 'Done', is also represented by an empty circle. The steps are separated by horizontal lines.

Identifying the right Organization

Whether you are looking up a partner org or a customer org for this order, organization finder uses the email of the contact to identify potential matches.

There are 3 potential results from any org search:

1. Email exists in a Control Hub org, or that domain (e.g., @acme.com) is claimed by one org (see right)
2. Email does not exist, but the domain matches that of users in existing orgs
3. No matches. Create a new org

Welcome back! We found your organization

Based on your email address (exteamtrial.partner@gmail.com), we matched your order with your organization.

NewLight Partners

Organization ID: 38943035-1639-4836-8046-eb24b1534f41

Domains

Verified domains

Claimed domains

dc-01.com, dc-02.com

dc-01.com

Users

Number of users

Full administrators

Last user activity

36

Dick Walters, lakshmpartneruser, lakshmpartneruser, Magic Johnson, Markoff Morris, newlightadmingood karthikan, On test, eguser1, eguser1

2022-05-10T16:08:42.830Z

Subscriptions

Active trials

Active subscriptions

0

15

Other information

Country or region

Account created

North America

6/1/2018, 3:19:48 PM

Identifying the right Organization

– Result 1

When the email exists in an organization or the domain has been claimed (such that users must only exist in that one org), then this screen (see right) will appear.

In this scenario, the option to create a new org is not available.

Review the details of the org and proceed.

Welcome back! We found your organization

Based on your email address [redacted@mail.com], we matched your order with your organization.

NewLight Partners

Organization ID: 38f4303b-1639-483b-8cab-efc2eb1534f4

Domains

Verified domains

Claimed domains

dc-01.com, dc-02.com

dc-01.com

Users

Number of users

Full administrators

Last user activity

36

Don Waters, lakshmpartneruser, lakshmpartneruser, Magic Johnson, Markoff Morris, newlightadminprod, kenneth...

On test, eguser1, eguser1

2022-03-10T16:08:42.620Z

Subscriptions

Active trials

Active subscriptions

0

15

Other information

Country or region

Account created

North America

6/1/2018, 2:19:48 PM

Identifying the right Organization – Result 2

When the user doesn't exist yet in Control Hub, but their domain (e.g., @acme.com) matches that of other users in Control Hub, then those orgs will appear (see right).

Review the details of each org, but take particular notice of the org that you already manage and/or is suggested to you.

In this scenario, the option to create a new org is available, in case none of these orgs appear to be the desired org.

We're searching based on your email address

We found matching organizations based on your email address (charley@customer.org) . Learn more about choosing the correct one. If you don't see your organization on this list, you can also create a new organization.

Circle & Co.

Organization ID: 12498343-2323-2342342-2342432

Managed by you

Suggested

Domains

Verified domains

Ac**.com, Ac***test.com

Claimed domains

Ac**.com, Ac***test.com

Users

Active users

100

Full administrators

Aditya Agarwal, Carolyn Kremer, Erica Hernandez, Sandy Chow, Dorothy Hollifield

Last user activity

1/2/21, 10:39 PM

Subscriptions

Active trials

No

Active subscriptions

1

Other information

Country or region

United Kingdom

Account created

6/4/16, 10:04 PM

Circle Inc.

Org ID: 12498343-2323-2342342-2342432

Circle LLC

Org ID: 12498343-2323-2342342-2342432

These suggestions are based on the email address and organization's status.

Review and submit – “this order is for my customer”

This screen shows the order being mapped to this partner and customer org. The partner now gains access to manage this customer org.

The ‘provisioning administrator’ text shows when the partner is mapping the order to an existing customer org. The partner can provision the order as usual, but to further manage the customer (e.g., license users), the customer will need to elevate their privileges in Control Hub. ([help doc](#))

If you already manage this customer or you are creating this customer org, then this page will mention ‘full administrator’, and not ‘provisioning administrator’.

NewLight Partners will manage botorg

Subscription ID: Subftsw-cisco-1

If you're sure this is your customer organization, continue with provisioning this subscription. **Submitting this is final and can't be undone.**



[Review](#)

Partner

Provisioning administrator ⓘ



[Review](#)

Customer

NewLight Partners

Organization ID: 38f43035-1639-483b-80ab-eb2eb1534441

Domains

Verified domains: dc-01.com, dc-02.com
Claimed domains: dc-01.com

Users

Number of users: 38
Full administrators: Dion Walters, lakshmi.partneruser, Magie Johnson, Markieff Morris, newlightadminprod, kennakan, Ori test, nguser1, sguser1
Last user activity: 2022-03-10T16:08:42.626Z

Subscriptions

Active trials: 0
Active subscriptions: 15

Other information

Country or region: North America
Account created: 6/1/2018, 2:19:48 PM

botorg

Organization ID: ba1e45ef-c90b-4097-ae0f-655e50e70963

Domains

Verified domains: None
Claimed domains: None

Users

Number of users: 128
Full administrators: Bot Org Admin, DLP
Last user activity: Not available

Subscriptions

Active trials: 1
Active subscriptions: 0

Other information

Country or region: North America
Account created: 4/10/2018, 8:19:11 AM

Review and submit – “this order is for me”

This screen shows the order being mapped to this organization (without a partner mapped to the order). Review the details and proceed to service setup.

Verify NewLight Partners

Subscription ID: Subftaw-cisco-1

Review the information for your new organization. **Certify if this order is correct.** Once you certify this order, you can't change organizations.



[Review](#)

Customer

NewLight Partners

Organization ID: 38f43035-1639-483b-80ab-eb2eb1534f41

Domains

Verified domains	dc-01.com, dc-02.com
Claimed domains	dc-01.com

Users

Number of users	36
Full administrators	Dion Waters, lakshmi@partneruser, lakshmi@partneruser, Magic Johnson, Markeff Morris, newlightadminprod.kannan, Cri test, sguser1, sguser1
Last user activity	2022-03-10T16:08:42.629Z

Subscriptions

Active trials	0
Active subscriptions	15

Other information

Country	North America
Account created	5/1/2018, 2:19:48 PM


Moving on to service setup

If you are a partner provisioning for a customer, you have the option to delegate service setup to the customer by clicking on 'My customer will set up their own services'.

Order Number: 149853-2584-4389

Subscription ID: 2985-3496-349346

● Partner Information — ● Customer Information — ● Verify — ● Done



You're now ready to set up services

Order Number: 149853-2584-4389
Subscription ID: 2985-3496-349346

→ **Next step: set up services**

It'll take about 10 minutes to set up services. Customers can also set up services on their own.

☐ **My customer will set up their own services**

Check this option to send an email to pbeasley@scme.com with instructions.

Step-by-step: Service setup

Review the details of the Subscription

Review the details of all the licenses included in the subscription. If you are modifying an existing subscription or converting a trial, you will see the net-changes, such as:

- License quantity changes
- New services
- Canceled services
- Converted trial licenses

Order ID: 91f35252-cf84-43c4-b9cc-b928ee7e86e5
Subscription ID: b9cc-b928ee7e86e5

Summary of subscription changes

- Order ID 91f35252-cf84-43c4-b9cc-b928ee7e86e5
- Subscription ID b9cc-b928ee7e86e5
- Org Name Circle US
- Org ID a293847-254525235-23525523

Check your order confirmation email if you have questions about your order details. Over the next few screens we'll be setting up services. You'll see all changes after completing this setup wizard.

Webex Calling Converted to Pool

Basic Calling	150 licenses	Add-ons Updated	
Enterprise Calling	150 licenses	Cisco Calling Plan	150 licenses ↑ 25, previously 115

Webex Meetings Updated

Meetings	150 licenses ↓ 25, previously 125	Add-ons Updated	
Events 1,000	150 licenses ↓ 25, previously 175	Real-Time Translations	150 licenses
Events 2,000	150 licenses ↑ 25, previously 115	Webex Assistant	150 licenses
Events 5,000	25 new licenses		
Events 25,000	150 licenses ↑ 25, previously 115		
Events 50,000	150 licenses ↑ 25, previously 115		
Events 75,000	150 licenses ↓ 25, previously 175		
Events 100,000	150 licenses ↓ 25, previously 175		
Support	150 licenses ↑ 25, previously 115		
Training	150 licenses ↑ 25, previously 115		
Basic Space Meetings	150 licenses ↓ 25, previously 175		
Advanced Space Meetings	25 new licenses		

Webex Messaging New

Message	150 licenses
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Webex Devices Canceled

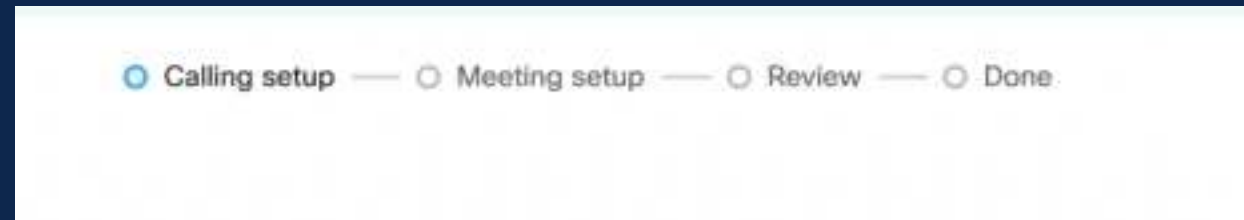
Device Registration	25 licenses
---------------------	-------------

Setting up calling, meetings

Service setup requires only the minimal information to get the ordered services up and running. In some cases, service setup may not ask for information that's already been provided for this customer.

Calling— HQ location, SIP — if setup for the customer org, setup wizard will not ask for this information.

Meeting— meetings URL may still be required for this subscription.



Setting up calling

The only information required at this time is the HQ location of the customer. The address is auto-completed and validated as you enter it in.

SIP address is pre-populated based on company name. Review the details and proceed.

Calling setup

Meeting setup

Review

Done

Set up your headquarter's calling location

The country with the majority of your users is your headquarter's calling location. Calling data is stored here. Keep in mind that this first calling location is required to set up Webex Calling. You can edit or delete your headquarter's calling address any time in Control Hub.

Location name

CircleUS

Country or region ⓘ

United States

Announcement language ⓘ

English

Time zone

(GMT-7:00) America/Los Angeles

Address

9815 Circle Way

Address line 2

City

Birmingham

State

AL

ZIP code

35201



Carmen

webex user avatar

carmen@circleus.calls.webex.com

Users can go to Settings to see their unique SIP address.

SIP address name

Circleus

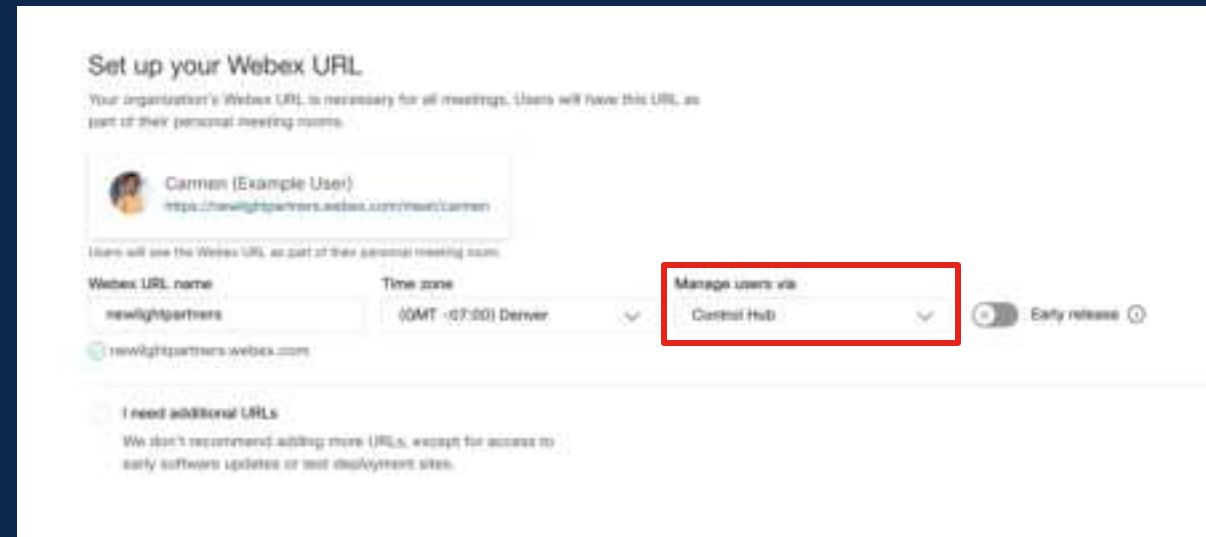
circleus.calls.webex.com

circleus.rooms.webex.com

Setting up meeting


In most cases, you will need just one Webex meetings URL. For 'manage users via', it is highly recommended that you select 'Control Hub' (Site Admin is being obsoleted).

By proceeding with one meetings URL, all of the meetings services (e.g., meetings, webinar) will be enabled on this URL.
(<https://partnername.webex.com/meet/user>)



Set up your Webex URL


Your organization's Webex URL is necessary for all meetings. Users will have this URL as part of their personal meeting rooms.

 **Carmen (Example User)**
<https://newlightpartners.webex.com/join/carmen>

Users will see the Webex URL as part of their personal meeting room.

Webex URL name **Time zone**

Manage users via ☐ **Early release** ⓘ

 newlightpartners.webex.com

☐ **I need additional URLs**
We don't recommend adding more URLs, except for access to early software updates or test deployment sites.

Setting up meeting with multiple URLs

In certain scenarios, you may want a URL to get early release to features and/or perform sandbox testing. If you do, you will need to distribute licenses across URLs.

Distribute Webex Meetings licenses across URLs

Available licenses

Webinar 5,000
licenses remaining

0

Assign licenses across URLs

☒ Assigned all available licenses

☒ All URLs have at least one service enabled

URL: newlightpartners.webex.com

Webex Control Hub

Webinar 5,000

5

URL: newlightpartners2.webex.com

Webex Control Hub

Webinar 5,000

5

Review before submitting


Review your input information before clicking 'submit'. Clicking on 'submit' is final, so please review the details before proceeding. You can always return to the prior setup steps to edit information.

If you are a partner provisioning for a customer, you will have the option to notify the customer via email as you complete service setup.

The screenshot shows a 'Review' step in a multi-step process. At the top, a progress bar indicates the steps: 'Calling setup' (active), 'Meetings setup', 'Review', and 'Done'. The main heading is 'Here's what you'll set up', followed by the instruction 'Review your changes and click submit for all service address.' Below this, there are two main sections: 'Calling setup' and 'Meetings setup', each with a 'Go back and edit' link. The 'Calling setup' section includes fields for 'Location name' (HQ location), 'Address' (sample address, sample city, DE-111, 12345), 'Language' (Danish - Danish), 'Time zone' (Europe/Berlin), 'Country or region' (Germany), and 'SIP addresses' (samplecustomerag.cafes.webex.com and samplecustomerag.rooms.webex.com). The 'Meetings setup' section includes 'Time zone' (GMT+12:00), 'Early release' (No), 'Release' (10), and 'Location' (Marshall Islands). At the bottom, there is a checkbox labeled 'Email the customer admin (sampleuser123@mailinator.com) that their services are ready.' which is highlighted by a red rectangular box. At the very bottom of the page, there are 'Back' and 'Submit' buttons.

Continue to Control Hub

You can download a PDF of the details of this order for future reference. Click on 'close' to continue to Control Hub.



Your services will be ready soon
We're working on provisioning your services. Here's what's being setup.

Calling setup

Location: Circle US
Address: 8715 Circle way
Birmingham, AL 35201

Language: English (United States)
Time zone: (GMT-7:00) America/Los An...

SIP addresses:
circleus.calls.webex.com
circleus.rooms.webex.com

Meetings setup

Meetings URL	Time zone	Early release	Meetings	Events	Training
circle.webex.com	Already selected	Yes	25	Utility based	25
circleus.webex.com	(GMT-5:00) America/Chicago	No	25	25	25
circletest.webex.com	(GMT-5:00) America/Chicago	Yes	25	25	Utility based
circleus.webex.com	(GMT-3:00) America/Argentina/Buenos Aires	No	Utility based	Utility based	Utility based

Also provisioning...

- Webex Messaging
- Webex Devices

Send email to the customer admin once provisioning is submitted

[Download order summary \(PDF\)](#)

[Close](#)

Resources

- [Help Documentation](#)



The bridge to possible