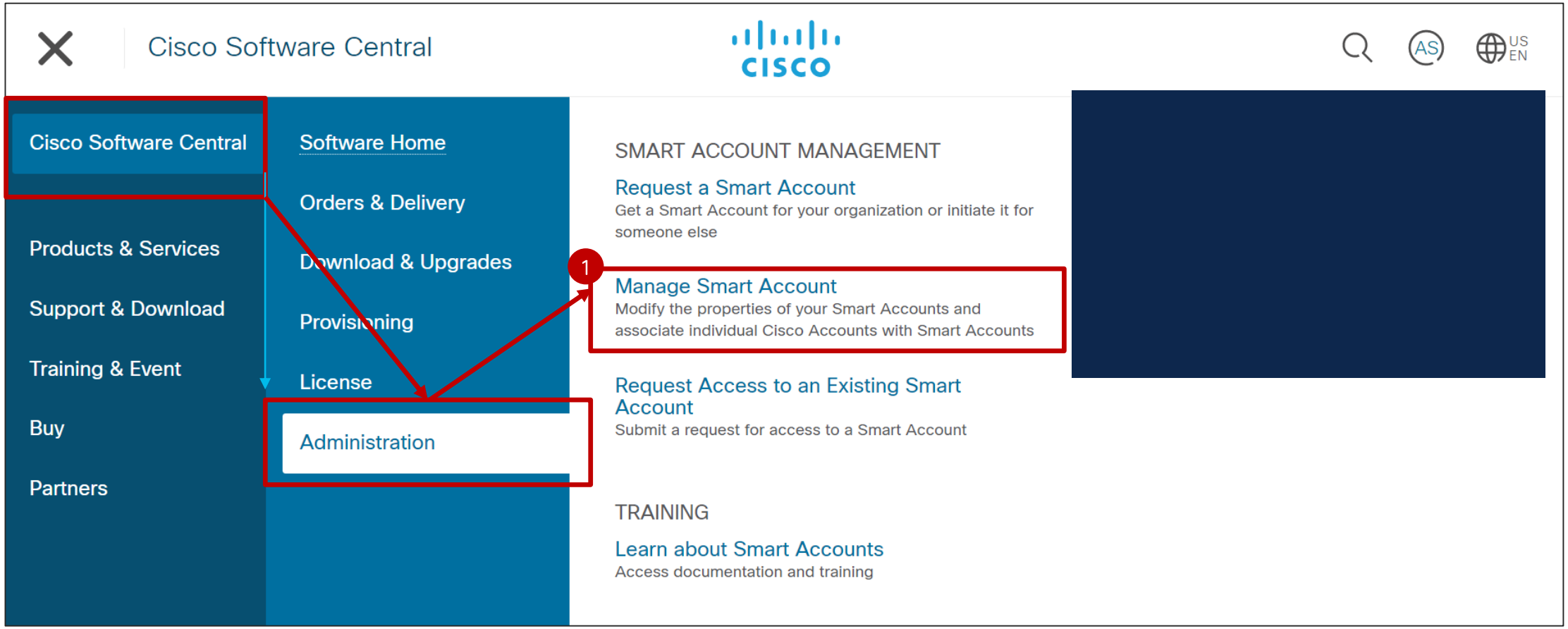
Cisco Software: Virtual Account Custom Tagging

Quick Guide for Partners & Customers

Note: Screens in the presentation may vary slightly from the actual tools

Cisco Software Central (CSC)
Manage Smart Accounts

1. To add and manage Custom tags, login to **Cisco Software Central (software.cisco.com)**, go to the **Administration** section and click on **Manage Smart Account**.



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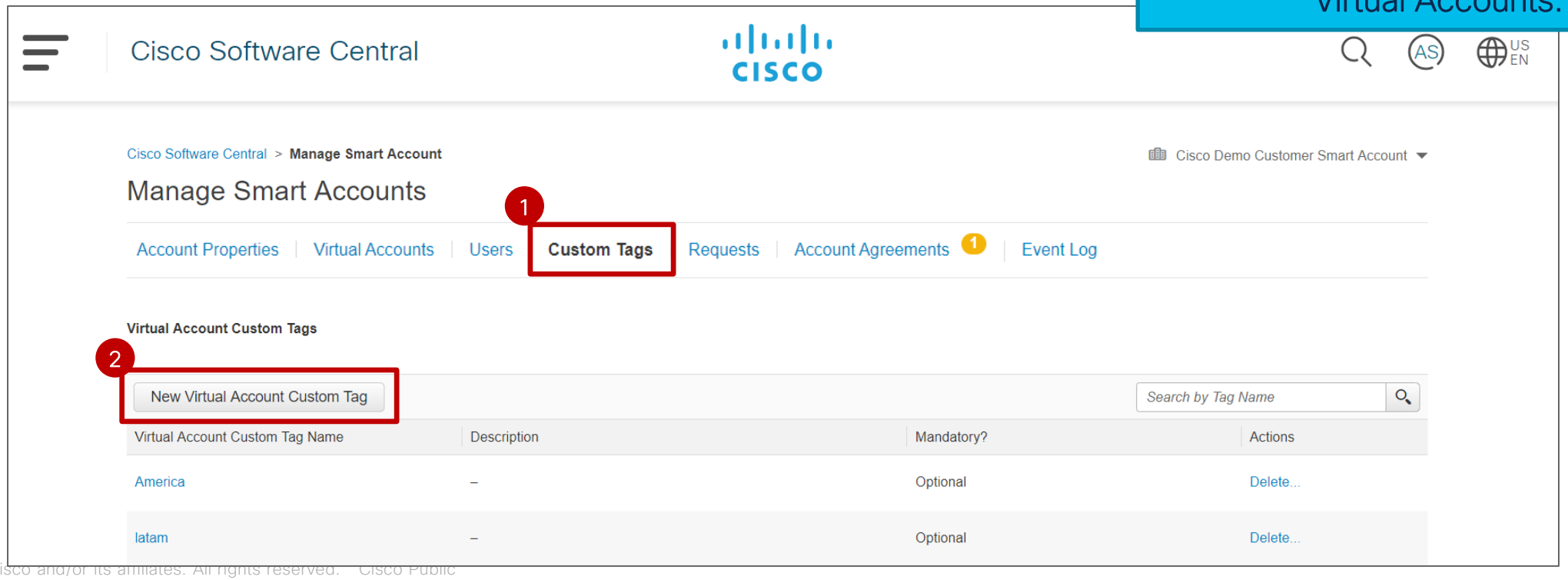
Manage Smart Account – Custom Tags
Virtual Account Custom Tagging

You can now create **Custom Tags** at the **Virtual Account level** (e.g. Department, Platform Technology, Country etc.) and list values for each of them. This will help you effectively organize and manage Virtual Accounts (VAs) based on the organizational structure and entitlement policies of your company.

1. Go to the **Custom Tags** tab.
2. Click the **New Virtual Account Custom Tag** button.

Only Smart Account Administrators can create new Custom Tags for Virtual Accounts.



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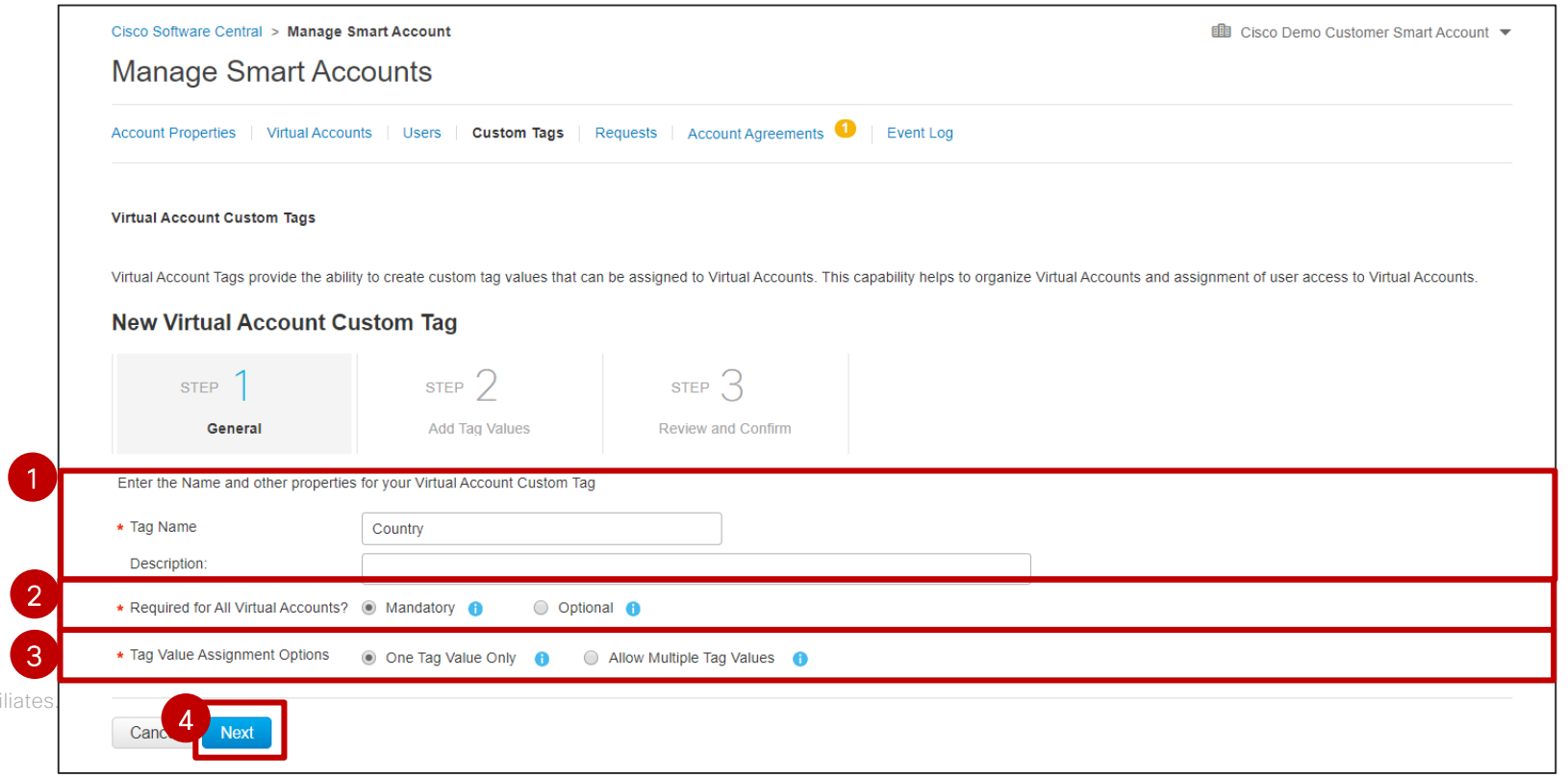
Manage Smart Account – Custom Tags
Virtual Account Custom Tagging

1. **Step 1: General**, enter the tag details, such as **Tag Name**, **Description**.
2. Ensure to categorize the tag as **Mandatory** or **Optional**. *If you select **Mandatory** for the **Country tag**, you will have to provide a value for Country for all Virtual Accounts including existing Virtual Accounts as well as new Virtual*
3. *Accounts.*

   You can also choose if you want the tag to have single value or more than one value for a Virtual Account.
   - *If 'One Tag value' option is selected, you will be able to assign only one Country for a Virtual Account.*
4. - *If 'Allow Multiple Tag Values' option is selected, you will be able to assign multiple countries to a Virtual Account.*

   Click on **Next.**



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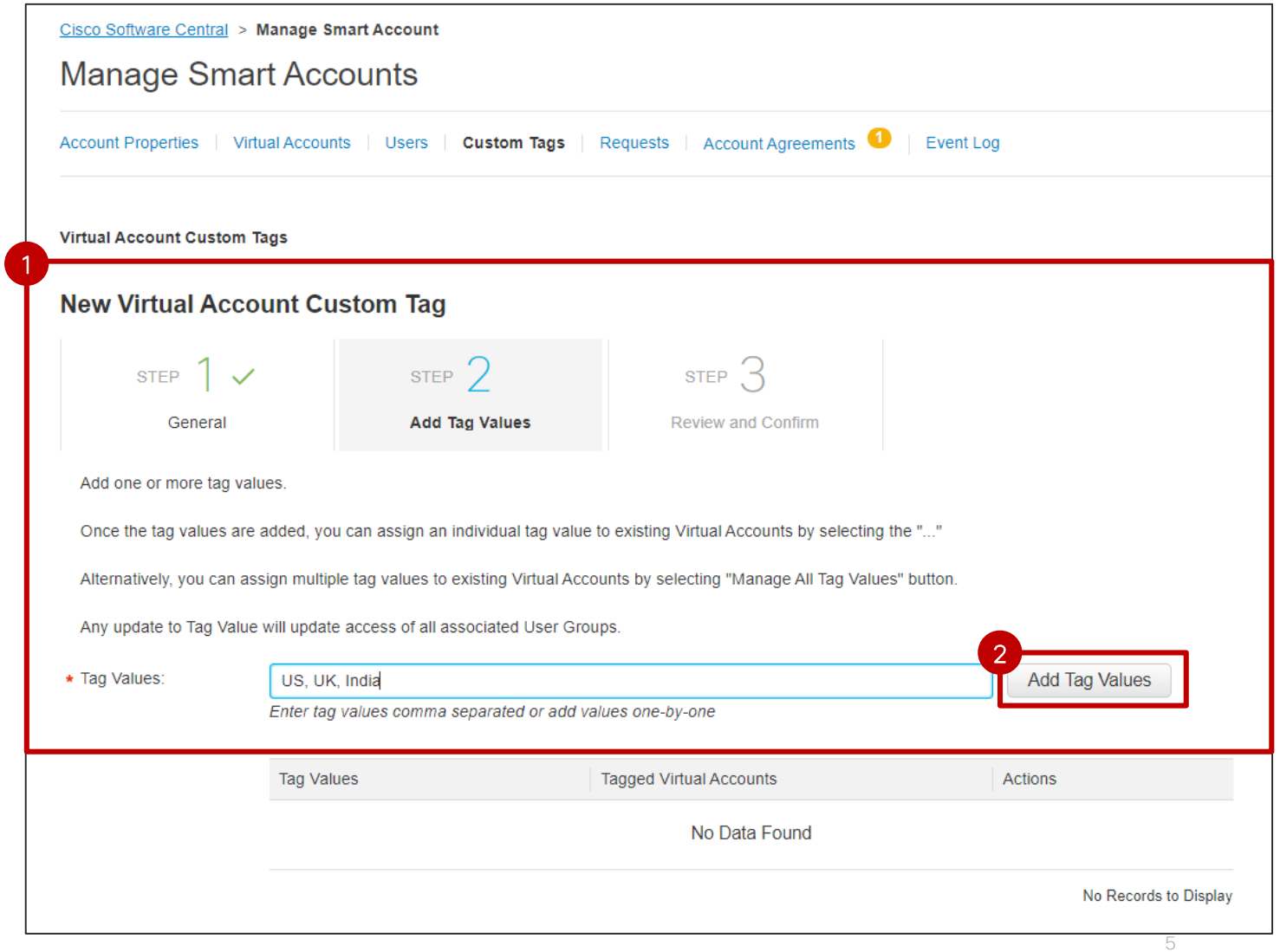
Manage Smart Account – Custom Tags
Virtual Account Custom Tagging

1. In **Step 2**, add the **Tag Values** based on the Tag you specified in Step 1.

   *For example, if you entered **Country** in Step 1, you can define the tag values as different countries (e.g. US, UK, India).*

2. Click the **Add Tag Values** button.



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Manage Smart Account – Custom Tags

Virtual Account Custom Tagging

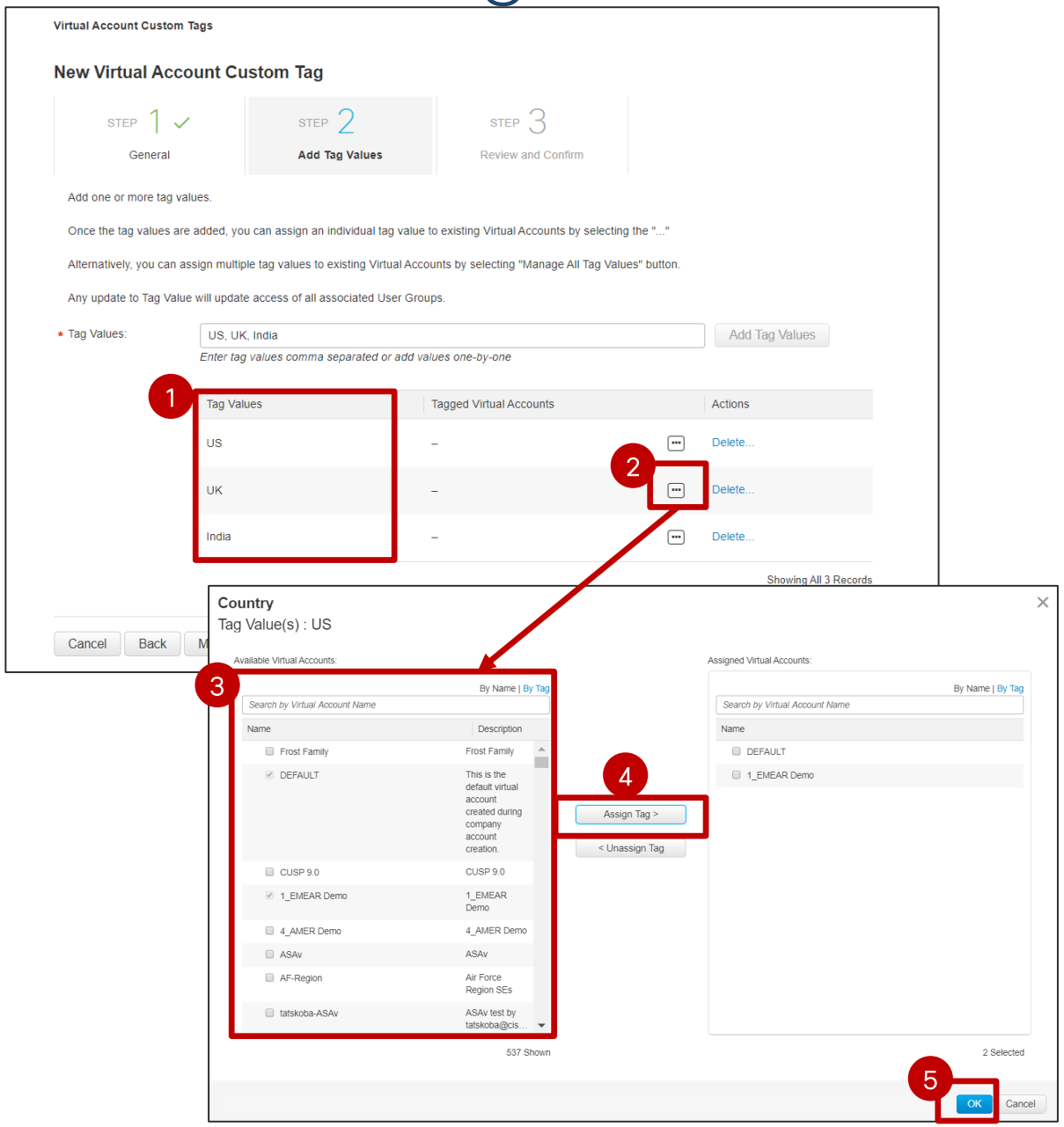
1. The **Tag Values** will appear at the bottom of the page (in **Step 2**).
   As a Smart Account Administrator, you can also associate each tag value to your current Virtual Accounts.

2. Click on the ellipses ⋯ to associate each tag value to your current Virtual Accounts.

3. A pop-up appears for the selected tag value. Select the check box next to the desired Virtual Account(s) that need to be associated to the tag value.

4. Click on **Assign Tag** to associate the selected Virtual Account(s) to the tag value.

5. Click **Ok**



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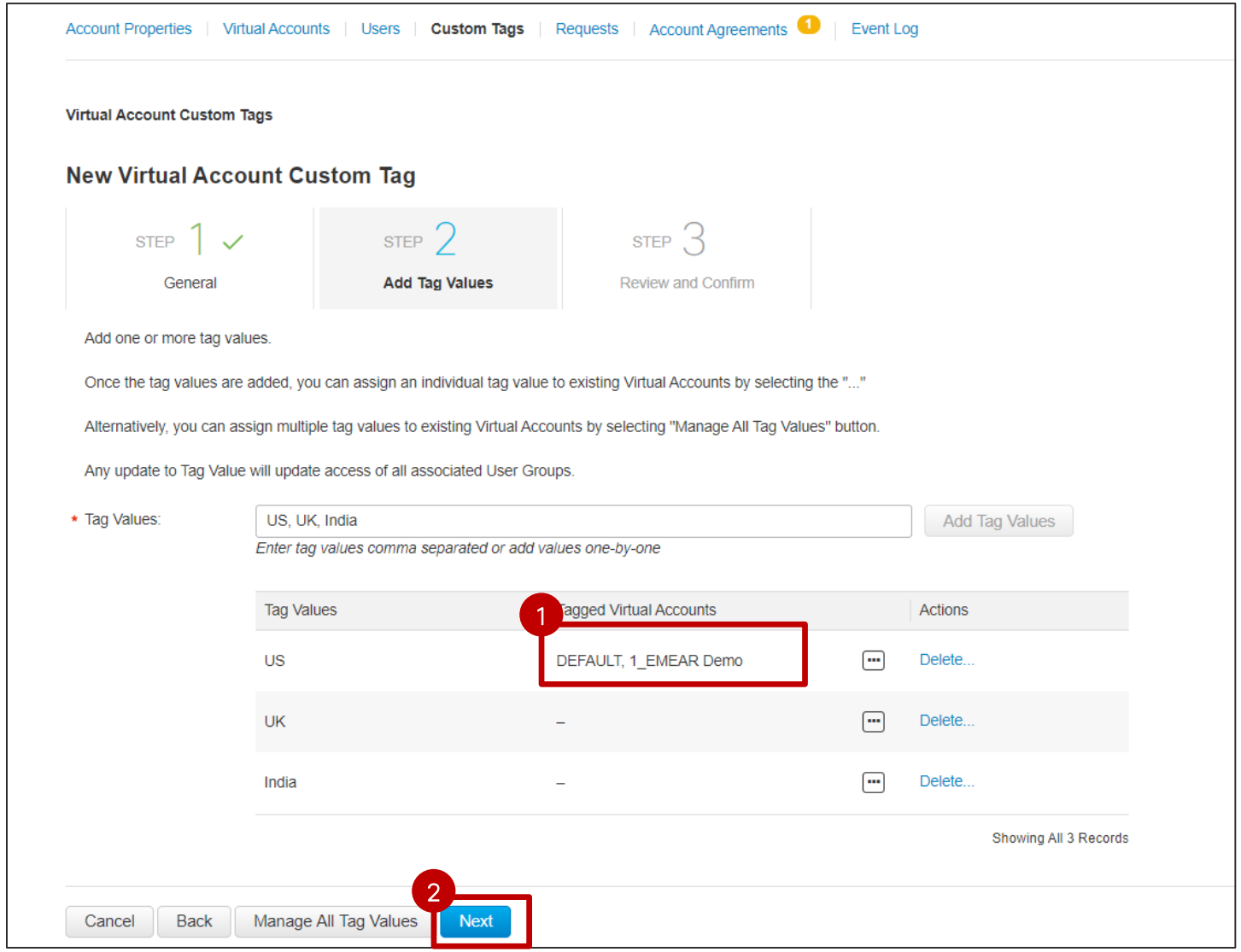
Manage Smart Account – Custom Tags
Virtual Account Custom Tagging

Once you click the OK button, you will go back to the **Add Tag Values (Step 2).** The grid here displays the **Virtual Account being tagged**.

1. In this example, the Virtual Accounts **DEFAULT** and **1_EMEAR Demo** have **US** as the value for the **Country tag**.

2. Click the **Next** button.



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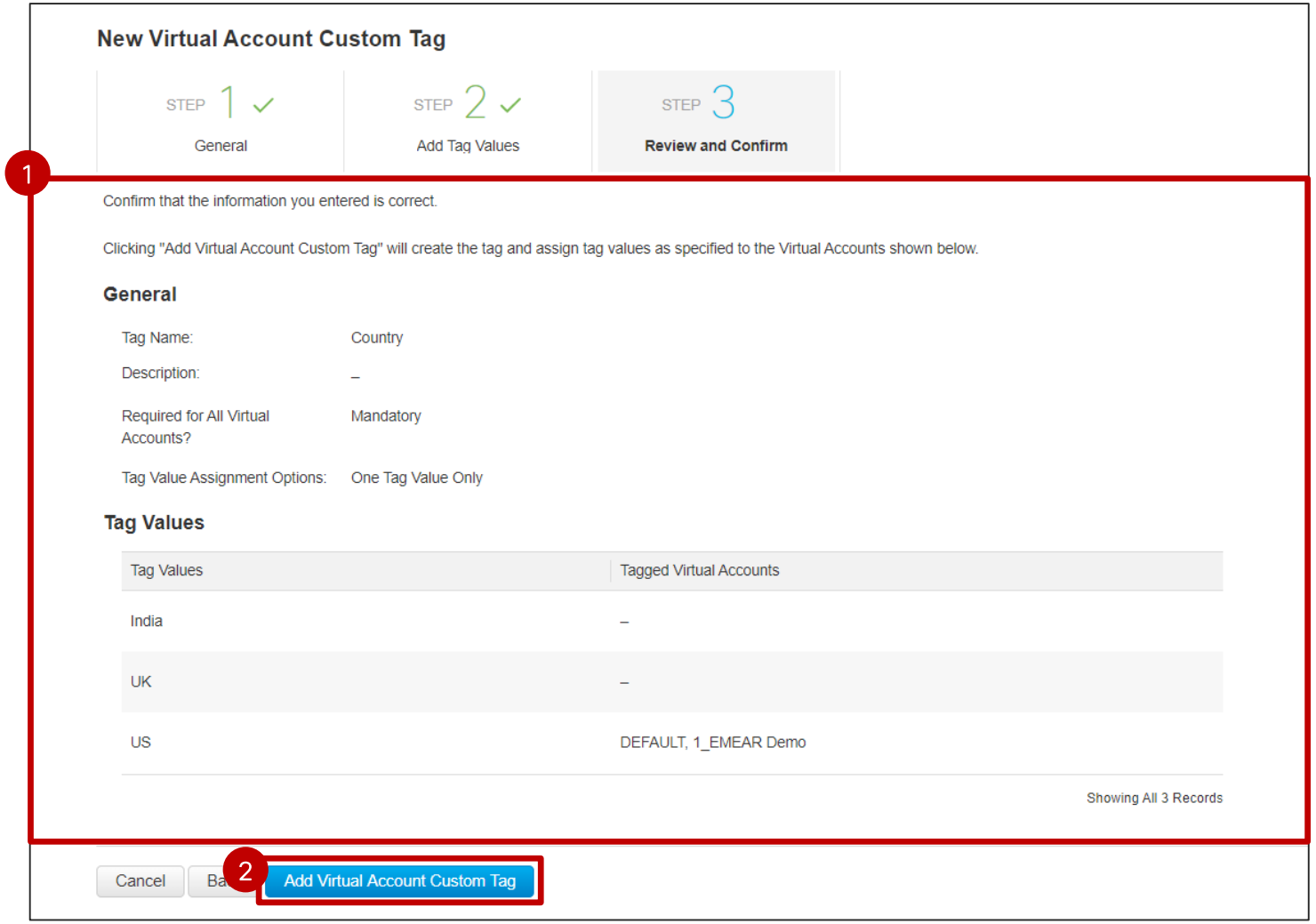
Manage Smart Account – Custom Tags
Virtual Account Custom Tagging

1. In **Step 3: Review and Confirm**, you can double-check the information.

2. Click the **Add Virtual Account Custom Tag** button.



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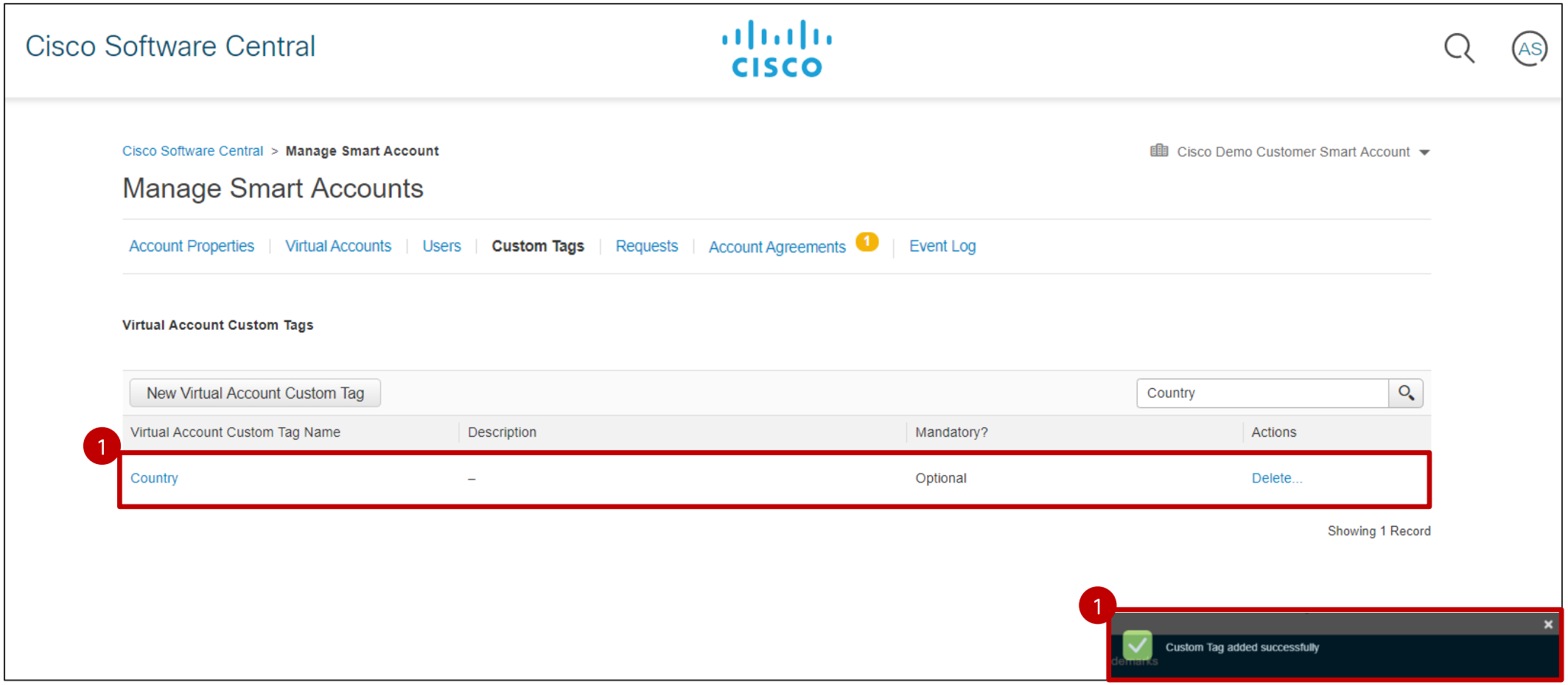
Manage Smart Account – Custom Tags
Virtual Account Custom Tagging

1. The landing page of the Custom Tags appears showing the successfully created Virtual Account Custom Tag Country.



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