







How to Assign a Partner to Manage your Smart Account

Quick Reference Guide for Customers

Assign a Partner to Manage your Smart Account

-  After creating your Customer Smart Account, you can grant Partners access to manage the Smart Account on your behalf by adding them as a User.
-  Please note that by authorizing a Partner User to access your Smart Account, you implicitly acknowledge that it will enable the Partner User to access all the information within the Smart Account that includes Licenses, Devices, etc.
-  In addition, please note that as a Customer you are responsible for all the actions performed by your Partners, which includes any licensing transactions as well.
-  Within a Customer's Smart Account, a Partner does not have the ability to:
 1. Accept a Smart Licensing Agreement on behalf of the Customer
 2. Be granted a Smart Account Approver role
 3. Remove a Customer Admin and their privileges.

Assign a Partner to Manage your Smart Account

Customers can grant Partners access to manage the licenses in their Smart Account by adding a Partner as a User.

There are 4 user roles that can be assigned to a Partner User:

Role	Access Level	Select this when...
Smart Account Administrator	Partners can view and manage license inventory for the entire Smart Account, and can also perform Account management activities.	Only one Partner will be managing the entire Customer Smart Account. The Partner can also manage Users and Virtual Accounts on Customer's behalf.
Virtual Account Administrator	Partners can view and manage licenses only in specific Virtual Account(s) for which they have been granted access. Partners can also manage Users in the assigned Virtual Account(s).	The Partner will be managing licenses in specific Virtual Account(s) but not within all the Virtual Accounts. The Partner will also be able to manage Users for the assigned Virtual Account(s).
Smart Account User	Partners can view and manage license inventory for the entire Smart Account.	The Partner will be managing licenses in the entire Customer Smart Account, but the Customer would like to keep control over the Account management activities (adding/ deleting Virtual Accounts and User management).
Virtual Account User	Partners can view and manage license inventory for assigned Virtual Account(s).	The Partner will be managing licenses within a particular Virtual Account, but the Customer would like to keep control over adding or deleting Users within that Virtual Account.

Please note that by authorizing access to Partner Users in their Smart Account, Customers implicitly acknowledge that it will enable Partners to access all the information within the Smart Account that includes Licenses, Devices etc.

In addition, please note that the Customer is responsible for all the actions performed by their Partners which includes any licensing transactions as well.

Grant Partner Access to your Customer Smart Account

- 1 From [Cisco Software Central](#), go to the **Administration** section and click on **Manage Smart Account**.

The screenshot displays the Cisco Software Central web interface. The top navigation bar includes the Cisco logo, a search icon, and language selection options (AS, US, EN). The left sidebar contains a menu with the following items: Cisco Software Central, Products & Services, Support & Download, Training & Event, Buy, and Partners. The 'Cisco Software Central' item is highlighted with a red box. A red arrow points from this box to the 'Administration' item in the 'Software Home' section of the sidebar, which is also highlighted with a red box. Another red arrow points from the 'Administration' box to the 'Manage Smart Account' link in the main content area, which is also highlighted with a red box. The main content area is titled 'SMART ACCOUNT MANAGEMENT' and contains the following links and descriptions:

- Request a Smart Account**
Get a Smart Account for your organization or initiate it for someone else
- Manage Smart Account**
Modify the properties of your Smart Accounts and associate individual Cisco Accounts with Smart Accounts
- Request Access to an Existing Smart Account**
Submit a request for access to a Smart Account

Below this section, there is a 'TRAINING' section with the link 'Learn about Smart Accounts' and the description 'Access documentation and training'.

Adding a Partner as a User or Admin to your Customer Smart Account

In the **Users** tab, all users associated with the Smart Account are displayed.

- 1 Upon selecting **Users** you will be able to see a list of users and an option to **Add Users**.

Cisco Software Central > Manage Smart Account

Cisco Demo Customer Smart Account

Account Properties | Virtual Accounts | **Users** | Custom Tags | Requests | Account Agreements | Event Log

Users

Users | User Groups

1 Add Users... Remove Selected... Export Selected...

<input type="checkbox"/>	User	Email	Organization	Account Access	Role	User Group	Actions
<input type="checkbox"/>	askocka						
<input type="checkbox"/>	Anna asi	@cisco.com	Cisco Systems, Inc.	All Virtual Accounts All Virtual Accounts 1_EMEAR Demo	Smart Account Administrator Smart Account Approver Virtual Account Administrator	- - Test User Group AS Deployment Engineers	Remove...

Adding a Partner as a User or Admin to your Customer Smart Account

- 1 In **Step 1, Select Users**, you can add one or more Users manually by entering their email addresses or Cisco User IDs.
- 2 Click on **Add**.
- 1a You can also **import new Users from a CSV file**. Click on **Upload Users** to import a CSV file.

[Account Properties](#) | [Virtual Accounts](#) | [Users](#) | [Custom Tags](#) | [Requests](#) | [Account Agreements](#) | [Event Log](#)

Add Users

STEP 1
Select Users

STEP 2
Assign Accounts

Select Users

In order to be granted access to your Smart Account, your users must have a Cisco.com ID. Enter the users' Cisco.com ID's or email addresses, and click Add. You can also upload a file of users.

1

Method: Add Users Manually

Users to Add:

2

Add

User	Email Address	Organization
------	---------------	--------------

[Account Properties](#) | [Virtual Accounts](#) | [Users](#) | [Custom Tags](#) | [Requests](#) | [Account Agreements](#) | [Event Log](#)

Add Users

STEP 1
Select Users

STEP 2
Assign Accounts

STEP 3
Review

Select Users

In order to be granted access to your Smart Account, your users must have a Cisco.com ID. Enter the users' Cisco.com ID's or email addresses, and click Add. You can also upload a file of users.

1a

Method: Import from CSV File

Upload Users

User	Email Address	Organization	Actions
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Adding a Partner as a User or Admin to your Customer Smart Account

- 2 After entering the email ID or Cisco.com ID of the new Smart Account User(s), click on **Add**. The system verifies whether a profile has been set up for them or not.
- 3 If there is a match, the User details will be automatically populated below, including User, Email Address, Organization.
- 4 Select **Next** to proceed.

The screenshot shows the 'Add Users' page with a progress bar at the top indicating three steps: STEP 1 (Select Users), STEP 2 (Assign Accounts), and STEP 3 (Review). The 'Select Users' section contains instructions and a form. A red box labeled '2' highlights the 'Add' button next to the 'Users to Add' input field. Another red box labeled '3' highlights the table of user details. A third red box labeled '4' highlights the 'Next' button at the bottom.

Account Properties | Virtual Accounts | Users | Custom Tags | Requests | Account Agreements | Event Log

Add Users

STEP 1
Select Users

STEP 2
Assign Accounts

STEP 3
Review

Select Users

In order to be granted access to your Smart Account, your users must have a Cisco.com ID. Enter the users' Cisco.com ID's or email addresses, and click Add. You can also upload a file of users.

Method:

Users to Add 2 **Add**

User	Email Address	Organization	Actions
<input type="text"/>	<input type="text"/>	<input type="text"/>	
test testtest	contro_1@hotmail.com	CISCO SYSTEMS LLC	Remove...

1 User

Cancel 4 **Next**

Choosing the Smart Account Role for your Partner

- 1a You are redirected to **Step 2: Assign Accounts**. Here you can choose if the new User will have access to the **Entire Smart Account** or to **Selected Virtual Accounts**.
- 2a If you choose **Entire Smart Account**, you can assign one of the three Smart Account Roles: Smart Account Administrator, Smart Account Approver, Smart Account User.

Cisco Software Central > Manage Smart Account

Cisco Demo Customer Smart Account

Account Properties | Virtual Accounts | Users | Custom Tags | Requests | Account Agreements | Event Log

Add Users

STEP 1 ✓ Select Users

STEP 2 Assign Accounts

STEP 3 Review

Assign Accounts to the Users

Select the accounts the users can access and the functions they can perform.

1a Scope of: ☒ Entire Smart Account

2a Access: ☐ Selected Virtual Accounts

User Role:

Cancel

Smart Account Administrator
Smart Account Approver
Smart Account User



A Smart Account Approver role can only be assigned to a User whose primary Email ID Domain matches the Smart Account's Domain ID.

Choosing the Smart Account Role for your Partner

- 3a Click on Next to confirm the Assigned Smart Account role.

Cisco Software Central > Manage Smart Account Cisco Demo Customer Smart Account

[Account Properties](#) | [Virtual Accounts](#) | [Users](#) | [Custom Tags](#) | [Requests](#) | [Account Agreements](#) | [Event Log](#)

Add Users

STEP 1 ✓
Select Users

STEP 2
Assign Accounts

STEP 3
Review

Assign Accounts to the Users

Select the accounts the users can access and the functions they can perform.

Scope of Access: ☒ Entire Smart Account ☐ Selected Virtual Accounts

User Role: Smart Account Administrator

Cancel Back Next

Choosing the Smart Account Role for your Partner

- 1b If you choose **Selected Virtual Accounts**, 2b you can assign one of the two Virtual Account Roles: Virtual Account Administrator or Virtual Account User.

Cisco Software Central > Manage Smart Account Cisco Demo Customer Smart Account

[Account Properties](#) | [Virtual Accounts](#) | [Users](#) | [Custom Tags](#) | [Requests](#) | [Account Agreements](#) | [Event Log](#)

Add Users

STEP 1 ✓
Select Users

STEP 2
Assign Accounts

STEP 3
Review

Assign Accounts to the Users

Select the accounts the users can access and the functions they can perform.

1b

Scope of Access:
☐ Entire Smart Account
☒ Selected Virtual Accounts

2b

User Role:
Available Virtual Accounts:

Virtual Account Administrator
Virtual Account User

Assigned Virtual Accounts:

By Name | By Tag

Choosing the Smart Account Role for your Partner

- 3b After selecting a Virtual Account Role (Virtual Account Administrator or Virtual Account User), you need to select one or more Virtual Accounts from the list of Available Virtual Accounts.
- 4b You can search by Name or Tag and tick the checkboxes to select Virtual Accounts.
- 5b You can either assign access to Virtual Account Only, or assign access to Virtual Account and its Children*
- 6b The Assigned Virtual Accounts will be shown on the right-hand side of the page.

STEP 1 ✓
Select Users

STEP 2
Assign Accounts

STEP 3

Add Users

Assign Accounts to the Users

Select the accounts the users can access and the functions they can perform.

Scope of Access: ☐ Entire Smart Account ☒ Selected Virtual Accounts

User Role: Virtual Account Administrator

Available Virtual Accounts:

By Name | By Tag

EMEAR

Virtual Account	Description
<input checked="" type="checkbox"/> 1_EMEAR Demo	1_EMEAR Demo
<input checked="" type="checkbox"/> 2_EMEAR Demo	2_EMEAR Demo
<input type="checkbox"/> EMEAR_hubertg	Virtual account for traini

5b

Assign Account and Children

Assign Account Only

Unassign Selected

Unassign All

Assigned Virtual Accounts:

By Name | By Tag

Search

Virtual Account	Scope
<input checked="" type="checkbox"/> 1_EMEAR Demo	Account and Children
<input checked="" type="checkbox"/> 2_EMEAR Demo	Account Only

*Assign access to Virtual Account and Children: this option is applicable if you have multiple levels of Virtual Accounts (Nested Virtual Accounts).

Choosing the Smart Account Role for your Partner

7b Click on Next to confirm the assigned Virtual Account roles.

[Account Properties](#) | [Virtual Accounts](#) | [Users](#) | [Custom Tags](#) | [Requests](#) | [Account Agreements](#) | [Event Log](#)

Add Users

STEP 1 ✓
Select Users

STEP 2
Assign Accounts

STEP 3
Review

Assign Accounts to the Users

Select the accounts the users can access and the functions they can perform.

Scope of Access: ☐ Entire Smart Account ☒ Selected Virtual Accounts

User Role:

Available Virtual Accounts:

By Name | By Tag

EMEAR

Virtual Account	Description
<input checked="" type="checkbox"/> 1_EMEAR Demo	1_EMEAR Demo
<input checked="" type="checkbox"/> 2_EMEAR Demo	2_EMEAR Demo
<input type="checkbox"/> EMEAR_hubertg	Virtual account for training purposes
<input type="checkbox"/> EMEAR FRANCE COLLAB RE...	AANNULER
<input type="checkbox"/> IOT-TSA-EMEAR	Account for demo's for IOT TSA Team

Assign Account and Children

Assign Account Only

Unassign Selected

Unassign All

Assigned Virtual Accounts:

By Name | By Tag

Search

Virtual Account	Scope
<input checked="" type="checkbox"/> 1_EMEAR Demo	Account and Children
<input checked="" type="checkbox"/> 2_EMEAR Demo	Account Only

Cancel

Back

Next

Adding a Partner as a User or Admin to your Customer Smart Account

- 1 In **Step 3: Review**, the user information and Account Access (proposed role assignment) is displayed for a final review.
- 2 If the information listed is correct, select **Add Users** to complete the process.

Account Properties | Virtual Accounts | Users | Custom Tags | Requests | Account Agreements | Event Log

Add Users

STEP 1 ✓
Select Users

STEP 2 ✓
Assign Accounts

STEP 3
Review

Review

Users		
User	Email Address	Organization
<input type="text"/>	<input type="text"/>	<input type="text"/>
test testtest test	contro_1@hotmail.com	CISCO SYSTEMS LLC

1 User

Account Access

Account	Scope	Assignment Source
<input type="text"/>	<input type="text"/>	<input type="text"/>
All Virtual Accounts		Smart Account Administrator

1 Assignment

Cancel Back **Add Users**

Adding a Partner as a User or Admin to your Customer Smart Account

- 1 Your Partner will receive an email notification confirming their new role within your Smart Account. The Partner will now have access to your Smart Account (or one of your Virtual Accounts) and can assist or manage your licenses on your behalf.
- 2 The Partner User also be listed in the primary Users tab.

1

From: CiscoAccountServices@cisco.com <CiscoAccountServices@cisco.com>
Sent: Monday, January 1, 2020 11:42 AM
To:
Subject: Cisco Smart Account Role Assigned - Cisco Demo Customer Smart Account

Cisco Smart Account Role Assigned - Cisco Demo Customer Smart Account

You have been assigned one or more new roles for the "Cisco Demo Customer Smart Account" Cisco Smart Account.

Cisco Smart Account Summary

Account Domain Identifier:	demo.cisco.com
Account Name:	Cisco Demo Customer Smart Account
Roles Assigned by:	Test (test@cisco.com)
Roles Assigned on:	Jan 1, 2020 10:42:22 GMT

You can visit [Cisco Software Central](#) to manage your Smart Account.

Roles Summary

- Smart Account Approver
- Smart Account Administrator

Cisco Software Central > Manage Smart Account

Cisco Demo Customer

[Account Properties](#) | [Virtual Accounts](#) | [Users](#) | [Custom Tags](#) | [Requests](#) | [Account Agreements](#) | [Event Log](#)

Users

Users						
<div>Add Users... Remove Selected... Export Selected...</div>						
<input type="checkbox"/>	User	Email	Organization	Account Access	Role	User Group
<input type="checkbox"/>	testtest					
<input type="checkbox"/>	test testtest	contro_1@hotmail.com	CISCO SYSTEMS LLC	All Virtual Accounts	Smart Account Administrator	-
						Remove...

1 User

