

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

Partners can view and manage license inventory for

the entire Smart Account, and can also perform

Partners can view and manage licenses only in

specific Virtual Account(s) for which they have

Users in the assigned Virtual Account(s).

been granted access. Partners can also manage

Partners can view and manage license inventory for

Partners can view and manage license inventory for

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.

Account management activities.

the entire Smart Account.

assigned Virtual Account(s).

Access Level

Role

Smart Account Administrator

Virtual Account Administrator

Smart Account User

Virtual Account User

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:

Assign a F	artner to	Manage	your	Smart A	1ccount
Customers can gr	ant Partners access to ma	anage the licenses in th	neir Smart Acc	count by adding a P	artner as a User.

Δ	Assign	a Partner	to M	lanage	your	Smart A	\ccount

Select this when...

Virtual Account(s).

management).

Account.

Only one Partner will be managing the entire Customer

Virtual Accounts on Customer's behalf.

Smart Account. The Partner can also manage Users and

The Partner will be managing licenses in specific Virtual

Partner will also be able to manage Users for the assigned

Customer Smart Account, but the Customer would like to keep control over the Account management activities

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(s) but not within all the Virtual Accounts. The

The Partner will be managing licenses in the entire

(adding/ deleting Virtual Accounts and User

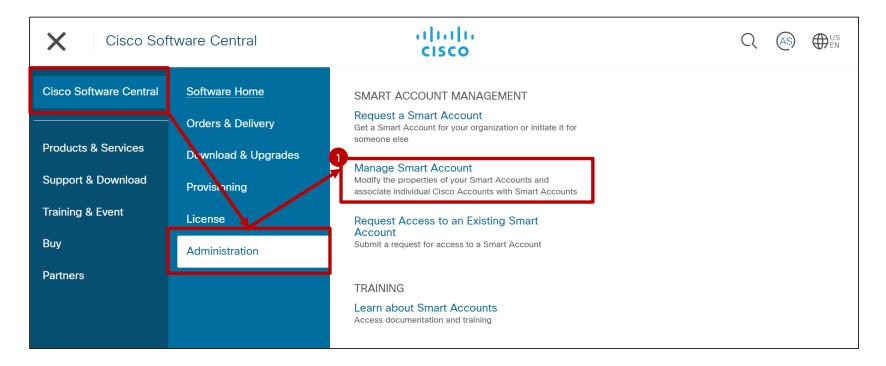
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Assign a Partner to	Manage your	Smart Account
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Assign a	Partner t	to M	lanage	your	Smart A	Account
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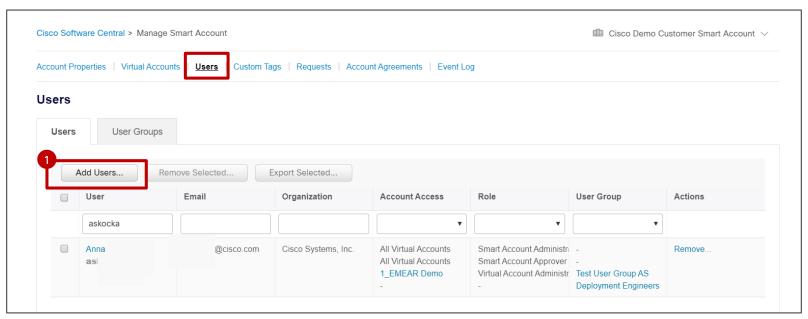
### Grant Partner Access to your Customer Smart Account

1 From Cisco Software Central, go to the Administration section and click on Manage Smart Account.

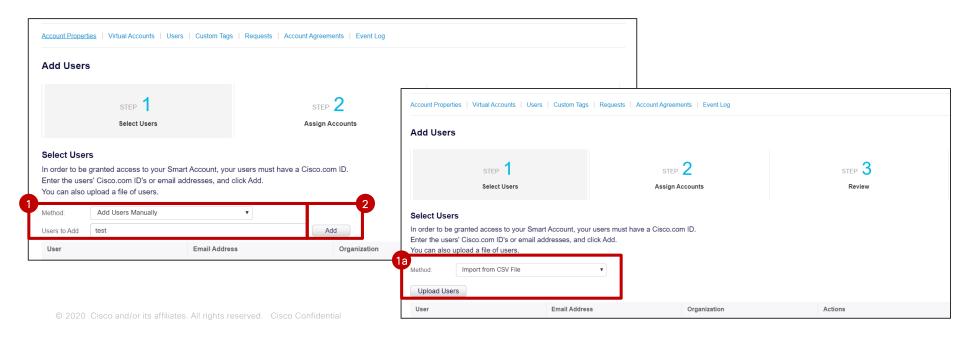


In the Users tab, all users associated with the Smart Account are displayed.

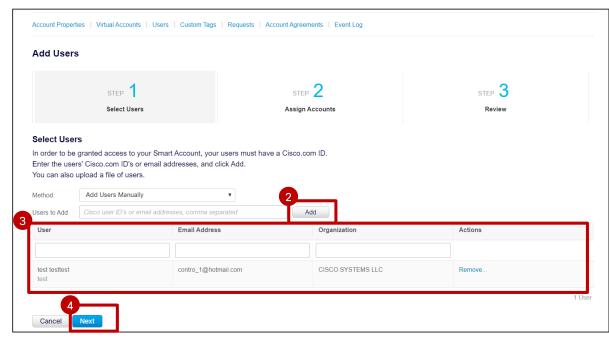
1 Upon selecting Users you will be able to see a list of users and an option to Add Users.



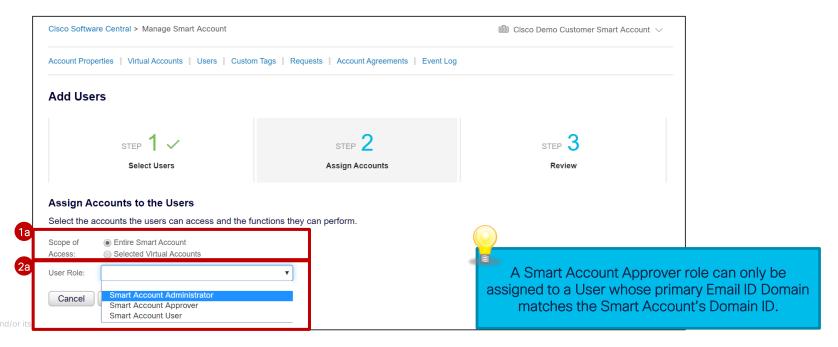
- 1 In Step 1, Select Users, you can add one or more Users manually by entering their email addresses or Cisco User IDs.
- 2 Click on Add.
- 19 You can also import new Users from a CSV file. Click on Upload Users to import a CSV file.



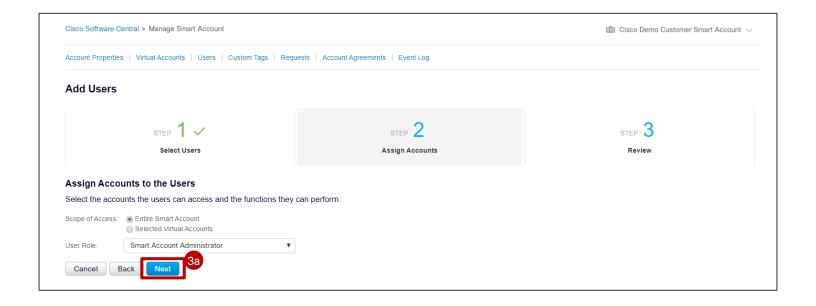
- 2 After entering the email ID or Cisco.com ID of the new Smart Account User(s), click on Add. The system verifies whether a profile has been set up for them or not.
- If there is a match, the User details will be automatically populated below, including User, Email Address, Organization.
- Select Next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



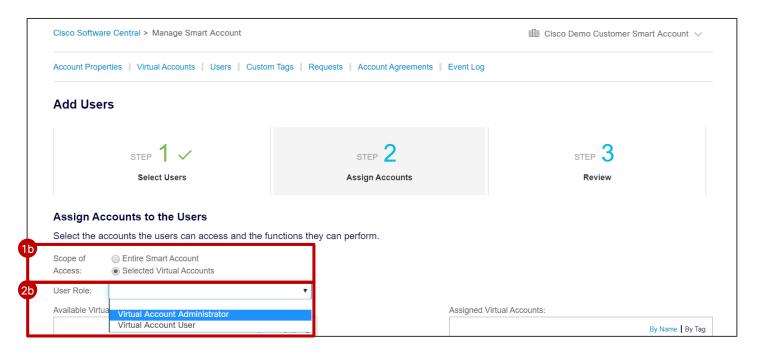
- 19 You are redirected to Step 2: Assign Accounts. Here you can choose if the new User will have access to the Entire Smart Account or to Selected Virtual Accounts.
- If you choose Entire Smart Account, you can assign one of the three Smart Account Roles: Smart Account Administrator, Smart Account Approver,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



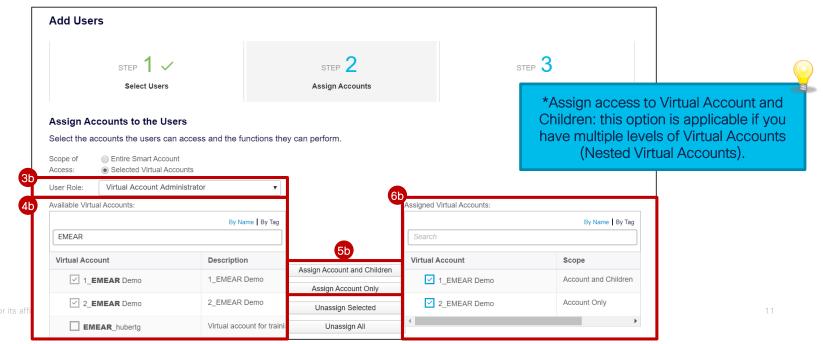
30 Click on Next to confirm the Assigned Smart Account role.



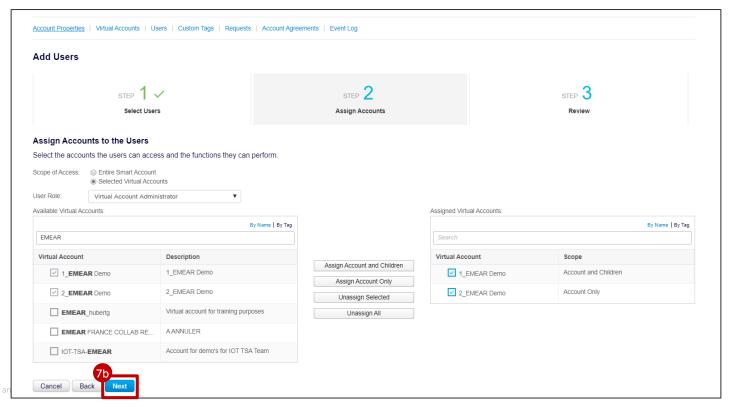
If you choose Selected Virtual Accounts, 20 you can assign one of the two Virtual Account Roles: Virtual Account Administrator or Virtual Account User.



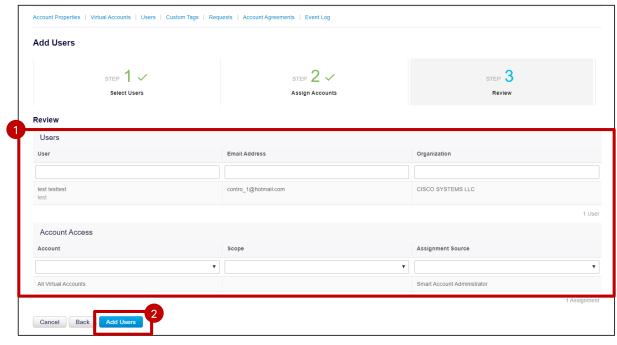
- After selecting a Virtual Account Role (Virtual Account Administrator or Virtual Account User), you need to select one or more Virtual Accounts from the list of Available Virtual Accounts.
- 4b You can search by Name or Tag and tick the checkboxes to select Virtual Accounts.
- 5b You can either assign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



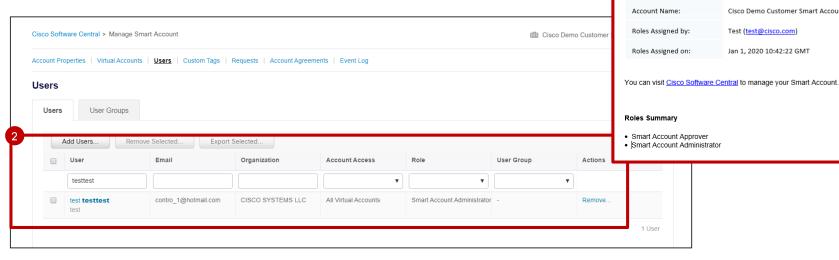
Click on Next to confirm the assigned Virtual Account roles.



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



- 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.



From: CiscoAccountServices@cisco.com < CiscoAccountServices@cisco.com >

Subject: Cisco Smart Account Role Assigned - Cisco Demo Customer Smart Account

demo.cisco.com

Test (test@cisco.com)

Jan 1, 2020 10:42:22 GMT

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

Cisco Demo Customer Smart Account

Sent: Monday, January 1, 2020 11:42 AM

Cisco Smart Account Summary

Account Domain Identifier:

Smart Account

## cisco