



How to Create a New Virtual Account

Quick Reference Guide for Partners & Customers

How to Create a New Virtual Account

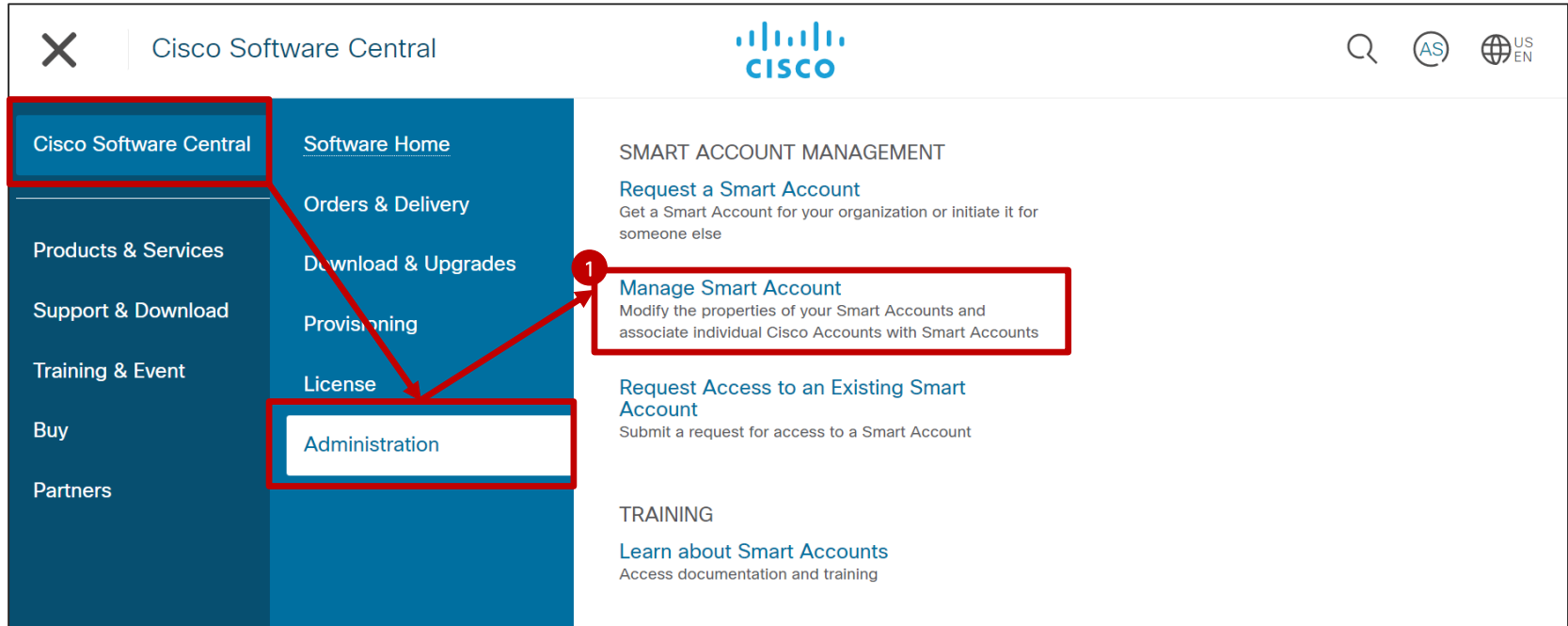
Introduction

- ✔ A **Customer Smart Account** provides the repository for Smart enabled products and enables Users to manage Cisco Software Licenses.
- ✔ **Smart Account Administrators** can create **New Virtual Accounts** within a Smart Account, and also **edit/ delete Virtual Accounts**.
- ✔ Please note that these capabilities are available only to **Smart Account Administrators**.
- ✔ In order to **Create a New Virtual Account**, login to [Cisco Software Central](#) with your Cisco User ID.

How to Create a New Virtual Account

Manage Smart Accounts

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



The screenshot displays the Cisco Software Central interface. The top navigation bar includes the Cisco logo, a search icon, and language selection options (AS, US, EN). The left sidebar contains a navigation menu with the following items: Cisco Software Central, Products & Services, Support & Download, Training & Event, Buy, and Partners. The 'Administration' item is highlighted with a red box. The main content area is titled 'SMART ACCOUNT MANAGEMENT' and contains the following options: 'Request a Smart Account' (with a sub-description: 'Get a Smart Account for your organization or initiate it for someone else'), 'Manage Smart Account' (with a sub-description: 'Modify the properties of your Smart Accounts and associate individual Cisco Accounts with Smart Accounts'), 'Request Access to an Existing Smart Account' (with a sub-description: 'Submit a request for access to a Smart Account'), and 'Learn about Smart Accounts' (with a sub-description: 'Access documentation and training'). A red circle with the number '1' is placed over the 'Manage Smart Account' option, and a red arrow points from the 'Administration' menu item to this option.

How to Create a New Virtual Account

Create a New Virtual Account

- 1 In the **Virtual Accounts** tab, you can view the list of Virtual Accounts, including Virtual Account Name, Description, Tags, Number of Users and User Groups, Access (Public or Private) and Actions.
- 2 Click on **Create Virtual Account** to add a new Virtual Account to your Smart Account.

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

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

Virtual Accounts

2 [Create Virtual Account](#) [Delete Selected...](#) [Export Selected...](#)

1 <input type="checkbox"/> Virtual Account	Description	Tags	Users	User Groups	Access	Actions
<input type="text" value="Filter by Virtual Account Name"/>	<input type="text" value="Filter by description"/>	<input type="text"/>			Sel ▾	
<input type="checkbox"/> Frost Family	Frost Family	-	796	2	PUBLIC	Actions ▾
<input type="checkbox"/> DEFAULT ★	This is the default virtual ac...	-	802	3	PUBLIC	Actions ▾
<input type="checkbox"/> CUSP 9.0	CUSP 9.0	-	794	-	PUBLIC	Actions ▾
<input type="checkbox"/> 1_EMEAR Demo	1_EMEAR Demo	-	897	2	PUBLIC	Actions ▾
<input type="checkbox"/> 4_AMER Demo	4_AMER Demo	-	1037	1	PUBLIC	Actions ▾

How to Create a New Virtual Account

Create a New Virtual Account

- 3 In **Step 1, Account Settings**, enter a **Name** and **Description** for the Virtual Account.
- 4 **Parent Account:** you can choose whether the **new Virtual Account** will be **At Top Level**, or you can create a **Nested Virtual Account**, under one of the existing Virtual Accounts.
**This option allows you to create multiple levels of Virtual Accounts. If you don't need multiple levels of Virtual Accounts, you can create all Virtual Accounts At Top Level.*

Cisco Software Central > Manage Smart Account

Cisco Demo Customer Smart Account

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

Create New Virtual Account

STEP 1 Account Settings

STEP 2 Assign Users

STEP 3 Review

Account Settings

Account Settings for your virtual account

3 Enter the name and details for your virtual account

* Name

Description

* Parent Account: 4

* Access Level

Expand All | Collapse All

Virtual Account	Description
Frost Family	Frost Family
DEFAULT	This is the default vir...

Preferred End Date

How to Create a New Virtual Account

Create a New Virtual Account

- 4a If you need to create a Virtual Account at Top Level, select Parent Account – At Top Level.
- 5a In addition, you have to set the Access Level: there are two options, Public or Private*.
- 6a You can select a Preferred End Date for your Subscriptions (check [this QRG](#) to learn more).
- 7a Optionally, you can set this Virtual Account as the Default Virtual Account.
- 8a Click on Next.

Create New Virtual Account

STEP 1 Account Settings STEP 2 Assign Users STEP 3 Review

Account Settings

Enter the name and details for your virtual account

*Name

Description

4a *Parent Account:
Top level virtual account that this account will be nested under

5a *Access Level:
If this account is visible in commerce applications, it simplifies depositing of licenses during purchase.

6a Preferred End Date:
Default date that software subscriptions must be repawort

Tags

EMEAR

myTag

7a Tags are used to label accounts for easier searching

Set as Default Virtual Account
Account that licenses and product instances are deposited into for this Smart Account

8a

*Public: the Virtual Account will appear in the search results of the Cisco Commerce Tools.

*Private: the Virtual Account will not appear to any user in the search results of the Cisco Commerce Tool. But if the exact Virtual Account Name is entered manually, such private Virtual Account can still be assigned to quotes and orders.

How to Create a New Virtual Account

Create a New Virtual Account

- 4b If you need to create a Nested Virtual Account, select a Parent Account (one of the existing VAs).
- 5b In addition, you have to set the Access Level: there are two options, Public or Private*.
- 6b You can select a Preferred End Date for your Subscriptions.
- 7b Optionally, you can set this Virtual Account as the Default Virtual Account.
- 8b Click on Next.

Create New Virtual Account

STEP 1 Account Settings

STEP 2 Assign Users

Account Settings

Enter the name and details for your virtual account

* Name

Description

* Parent Account:
Top level virtual account that this account will be nested under

* Access Level:
If this account is visible in commerce applications, it simplifies depositing of licenses during purchase.

Preferred End Date:
Default date that software subscriptions must be renewed.

Tags

EMEAR

myTag

Tags are used to label accounts for easier searching

Set as Default Virtual Account
Account that licenses and product instances are deposited into for this Smart Account

Cancel Next

The steps to create a Nested Virtual Account are the same as the steps to create a Top-Level Virtual Account, with the exception of the Parent Account selection: either Top Level or one of the Existing Virtual Accounts.

Account Settings

Enter the name and details for your virtual account

* Name

Description

* Parent Account:
At Top Level

* Access Level:
Expand All | Collapse All Search by Name By Name | By Tag

Preferred End Date

Tags

Virtual Account	Description
Frost Family	Frost Family
DEFAULT	This is the default vir...
CUSP 9.0	CUSP 9.0
1_EMEAR Demo	1_EMEAR Demo
4_AMER Demo	4_AMER Demo

How to Create a New Virtual Account

Create a New Virtual Account

- 9 In Step 2, Assign Users, you can assign Users to the newly created Virtual Account, by clicking on Assign Users. This is an optional step.

Create New Virtual Account

STEP 1 ✓
Account Settings

STEP 2
Assign Users

STEP 3
Review

Assign Users (Optional)

Select the users that will have access to this account

1 Some users are going to have access to this account because they will inherit access from a parent account.

Users User Groups

9 Assign Users

User	Email	Account Access	Roles	User Groups	Organization	#
test	<input type="text" value="Search by Email ID"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
test testtest test	contro_1@hotmail.com	Nested Virtual Account Demo and	VirtualAccountUser	-	CISCO SYSTEMS LLC	
this isatest nimooore		3_AMER Demo 4_AMER Demo	VirtualAccountUser VirtualAccountUser	- -		

2 Users

Notify users and group owners when they are assigned or unassigned

Cancel Back Next

How to Create a New Virtual Account

Create a New Virtual Account

- Optional step: **Assign Users to Virtual Account.** Select the Access Scope (*this Account only* or *this Account and its Children*). Select the User Role (*Virtual Account Administrator* or *Virtual Account User*), and Method (*Add Users Manually* or *Import from CSV file*).
- Add Users:** enter Cisco User IDs or email addresses and **click Add**.
- To confirm, **click OK**.

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

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

Assign Users to Virtual Account - Test Virtual Account 123

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

*Access Scope:

*User Role:

Method

Users to Add:

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

How to Create a New Virtual Account

Create a New Virtual Account

- 13 The newly added **Virtual Account User** or **Virtual Account Admin** will appear on the list.
- 14 You can tick the checkbox to **notify users when they are assigned or unassigned** to this Virtual Account.
- 15 Click on **Next**.

Create New Virtual Account

STEP 1 ✓ Account Settings

STEP 2 Assign Users

STEP 3 Review

Assign Users (Optional)

Select the users that will have access to this account

Some users are going to have access to this account because they will inherit access from a parent account.

Users User Groups

Assign Users

User	Email	Account Access	Roles	User Groups	Organization
testtest	Search by Email ID				
test testtest	contro_1@hotmail.com	Nested Virtual Account Demo and	VirtualAccountUser	-	CISCO SYSTEMS LLC
test testtest	contro_1@hotmail.com	This Account Only	VirtualAccountAdmin	-	CISCO SYSTEMS LLC

2 Users

Notify users and group owners when they are assigned or unassigned

Cancel Back Next

How to Create a New Virtual Account

Create a New Virtual Account

16 Review the Virtual Account Attributes and Users.

17 To confirm, click on **Create Virtual Account**.

Create New Virtual Account

STEP 1 ✓
Account Settings

STEP 2 ✓
Assign Users

STEP 3
Review

16

Review

Review the account attributes and users.

Account Settings

Name: Test Virtual Account 123
Description: Test Virtual Account for Training Development Purposes
Parent Account: At Top Level
Access Level: PUBLIC
Tags: -

Users

Users | User Groups

User	Email	Account Access	Roles	User Groups	Organization
testtest	<input type="text" value="Search by Email ID"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
test testtest	contro_1@hotmail.com	Nested Virtual Account Demo and	VirtualAccountUser	-	CISCO SYSTEMS LLC
test testtest	contro_1@hotmail.com	This Account Only	VirtualAccountAdmin	-	CISCO SYSTEMS LLC

2 Users

17

Cancel Back **Create Virtual Account**

How to Create a New Virtual Account

Create a New Virtual Account

- 18 The newly created Virtual Account will appear on the Virtual Accounts page. You can view the Virtual Account Name, Description, Tags, Number of Users and User Groups, Access (Public or Private) and Actions.
- 19 Under Actions, you can Change Parent Account, Delete Account or Set as Default Account (Default VA).

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

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

Virtual Accounts

[Create Virtual Account](#) [Delete Selected...](#) [Export Selected...](#)

<input type="checkbox"/> Virtual Account	Description	Tags	Users	User Groups	Access	Actions
<input type="text" value="Test Virtual Account 123"/>	<input type="text" value="Filter by description"/>	<input type="text"/>			<input type="text" value="Sel"/>	
<input type="checkbox"/> Test Virtual Account 123	Test Virtual Account for Tra...	-	794	-	PUBLIC	Actions ▾

- Change Parent Account...
- Delete Account...
- Set as Default Account...

How to Create a New Virtual Account

Create a New Virtual Account

- 1 You can search for a Virtual Account by name. You can also filter by description or search by Tags.
- 2 You can also filter by Access Level (Public or Private).

The screenshot shows the Cisco Software Central interface for managing Smart Accounts. The page title is "Cisco Software Central > Manage Smart Account" and the current account is "Cisco Demo Customer Smart Account". The navigation menu includes "Account Properties", "Virtual Accounts", "Users", "Custom Tags", "Requests", "Account Agreements", and "Event Log". The main heading is "Virtual Accounts".

Below the heading are three buttons: "Create Virtual Account", "Delete Selected...", and "Export Selected...".

The table below has the following columns: "Virtual Account", "Description", "Tags", "Users", "User Groups", "Access", and "Actions".

A red box labeled "1" highlights the search and filter area, which includes a search input field containing "Test Virtual Account", a "Filter by description" button, and a search input field. A red box labeled "2" highlights the "Access" column dropdown menu, which is currently set to "Sel".

Virtual Account	Description	Tags	Users	User Groups	Access	Actions
<input type="checkbox"/> Test Virtual Account	<input type="text" value="Test Virtual Account"/> <input type="button" value="Filter by description"/>	<input type="text"/>			<input type="button" value="Sel"/>	
<input type="checkbox"/> Test Virtual Account Private	Test Virtual Account Privat...	-	793	-	PRIVATE	Actions
<input type="checkbox"/> NL test Virtual Account	NL test Virtual Account	-	793	-	PRIVATE	Actions
<input type="checkbox"/> Test Virtual Account 123	Test Virtual Account for Tra...	-	794	-	PUBLIC	Actions

If the **Access Level** of an existing Virtual Account is set to **Public**, you can update this value to **Private**, if required.

Edit Virtual Accounts

- 1 Click the name of the **Virtual Account** to edit an existing Virtual Account.
- 2 You can edit **Name** and **Description**.
- 3 You can change the **Parent Account** (at **Top Level** or **Nested** under another Virtual Account).
- 4 You can change the **Access Level** (from **Public** to **Private** or viceversa).
- 5 In a **Customer SA** you can set up or modify the **Preferred End Date** for subscriptions.
- 6 You can **select or update Virtual Account Custom Tags**.
- 7 You can **set it as Default Virtual Account** (all new Orders without explicit Virtual Account assignment will be assigned to the Default VA).

Cisco Software Central > Manage Smart Account

Cisco Demo Customer Smart Account

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

Virtual Accounts

Create Virtual Account Delete Selected... Export Selected...

Virtual Account	Description	Tags	Users	User Groups	Access	Actions
EMEAR Demo	<input type="text" value="Filter by description"/>	<input type="text"/>			Sel	
<input checked="" type="checkbox"/> 1_EMEAR Demo	1_EMEAR Demo	-	897	2	PUBLIC	Actions
<input type="checkbox"/> 2_EMEAR Demo	2_EMEAR Demo	-	879	-	PUBLIC	Actions

Edit Virtual Account - 1_EMEAR Demo

General Users User Groups

2 * Name

Description

3 * Parent Account:

4 * Access Level

5 Preferred End Date

6 Tags

7 Set as Default Virtual Account

8

Remember to save your changes.

Default Virtual Account

1 The **Default** Virtual Account is created at the time of Smart Account activation. It is created to temporarily assign orders in case the Customers have not set up any other Virtual Account in their Smart Account.

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

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

Virtual Accounts

Create Virtual Account Delete Selected... Export Selected...

<input type="checkbox"/> Virtual Account	Description	Tags	Users	User Groups	Access	Actions
DEFAULT	Filter by description					Sel
<input checked="" type="checkbox"/> DEFAULT +	This is the default virtual ac...	-	802	3	PUBLIC	Actions

2 The **Access Level** of a **Default** Virtual Account is set to **Public**, so that it can continue to be used to assign orders in Cisco Commerce. You can also **set up or modify the Preferred End Date** for subscriptions.

Edit Virtual Account - DEFAULT

General Users User Groups

*Name: DEFAULT

Description: This is the default virtual account created during company account creation.

*Parent Account: At Top Level
Top level virtual account that this account will be nested under

*Access Level: Public
If this account is visible in commerce applications, it simplifies depositing of licenses during purchase.

Preferred End Date: Month Day

Tags: Default date that software subscriptions must be renewed
EMEAR
myTag

Tags are used to label accounts for easier searching

The Smart Account Administrator can change the Default Virtual Account, if needed.

Export Virtual Accounts

- 1 To Export multiple Virtual Accounts to a .csv/.xls file, select all Virtual Accounts by ticking the checkbox next to Virtual Account, or tick the checkboxes next to selected Virtual Accounts.
- 2 Click on Export Selected.
- 3 You will download a .csv/.xls file, containing a list of Virtual Accounts to which you have access (e.g. SA Admin or SA User will be able to export the entire list of Virtual Accounts, while VA Admin and VA User will only be able to export the list of Virtual Accounts to which they have access).
You will also be able to view the list of Users for each Virtual Account.

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

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

Virtual Accounts

1 Virtual Account 2

Virtual Account Name	Parent Vir	Virtual Acc	Commerci	Default Vi	Preferred	Tags	User Name	CCO Id	Email Address	User Group Name	User Role
0Demo-HK-PartnerA	-		PUBLIC	No							
0Telefonica	-		PUBLIC	No							VirtualAccountUser
0Telefonica	-		PUBLIC	No							VirtualAccountAdmin
0Telefonica	-		PUBLIC	No							VirtualAccountAdmin
1_EMEAR Demo	-	1_EMEAR	PUBLIC	No	JUN-30						VirtualAccountAdmin
1_EMEAR Demo	-	1_EMEAR	PUBLIC	No	JUN-30						VirtualAccountAdmin
1_EMEAR Demo	-	1_EMEAR	PUBLIC	No	JUN-30						VirtualAccountAdmin
1_EMEAR Demo	-	1_EMEAR	PUBLIC	No	JUN-30						VirtualAccountAdmin
1_EMEAR Demo	-	1_EMEAR	PUBLIC	No	JUN-30						VirtualAccountAdmin
1_EMEAR Demo	-	1_EMEAR	PUBLIC	No	JUN-30						VirtualAccountAdmin
1_EMEAR Demo	-	1_EMEAR	PUBLIC	No	JUN-30						VirtualAccountAdmin

Delete Virtual Accounts

- 1 To delete multiple Virtual Accounts, select all Virtual Accounts by ticking the checkbox next to Virtual Account, or tick the checkboxes next to selected Virtual Accounts.
- 2 Click on Delete Selected.
- 3 Confirm by clicking on Delete Virtual Account.

Cisco Software Central > Manage Smart Account

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

Virtual Accounts

Create Virtual Account Delete Selected... Export Selected...

<input checked="" type="checkbox"/>	Virtual Account	Description	Tags	Users	User Groups	Access	Actions
	Demo	<input type="text" value="Filter by description"/>	<input type="text"/>			Sel ▾	
<input checked="" type="checkbox"/>	1_EMEAR Demo	1_EMEAR Demo	-	897	2	PUBLIC	Actions ▾
<input checked="" type="checkbox"/>	4_AMER Demo	4_AMER Demo	-	1037	1	PUBLIC	Actions ▾

Delete Virtual Account

Are you sure you want to delete this account?

Note: Virtual Accounts can be deleted only by a Smart Account Administrator.

Virtual Accounts Best Practices

You can create multiple Virtual Accounts within one Smart Account.



- Create multiple Virtual Accounts within your Smart Account to subdivide your assets and ensure role-based access control.
- You can create a Virtual Account At Top-Level, or a Virtual Account Nested under an existing Virtual Account.
- This option allows you to create multiple levels of Virtual Accounts (up to 10 levels of Virtual Accounts).

Virtual Accounts should be used to enable access control for licenses.



- Virtual Account Users are only assigned to a Virtual Account, so they can only manage licenses in that Virtual Account.

Cisco Commerce Search



- **Public** Virtual Account names are visible for Partners in the Cisco Commerce (CCW) Smart Account search.
- **Private** Virtual Account Names are not visible in Cisco Commerce search, but can be assigned by Partners at the time of Quote/Order by typing the exact VA name.

