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 t**hese 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.

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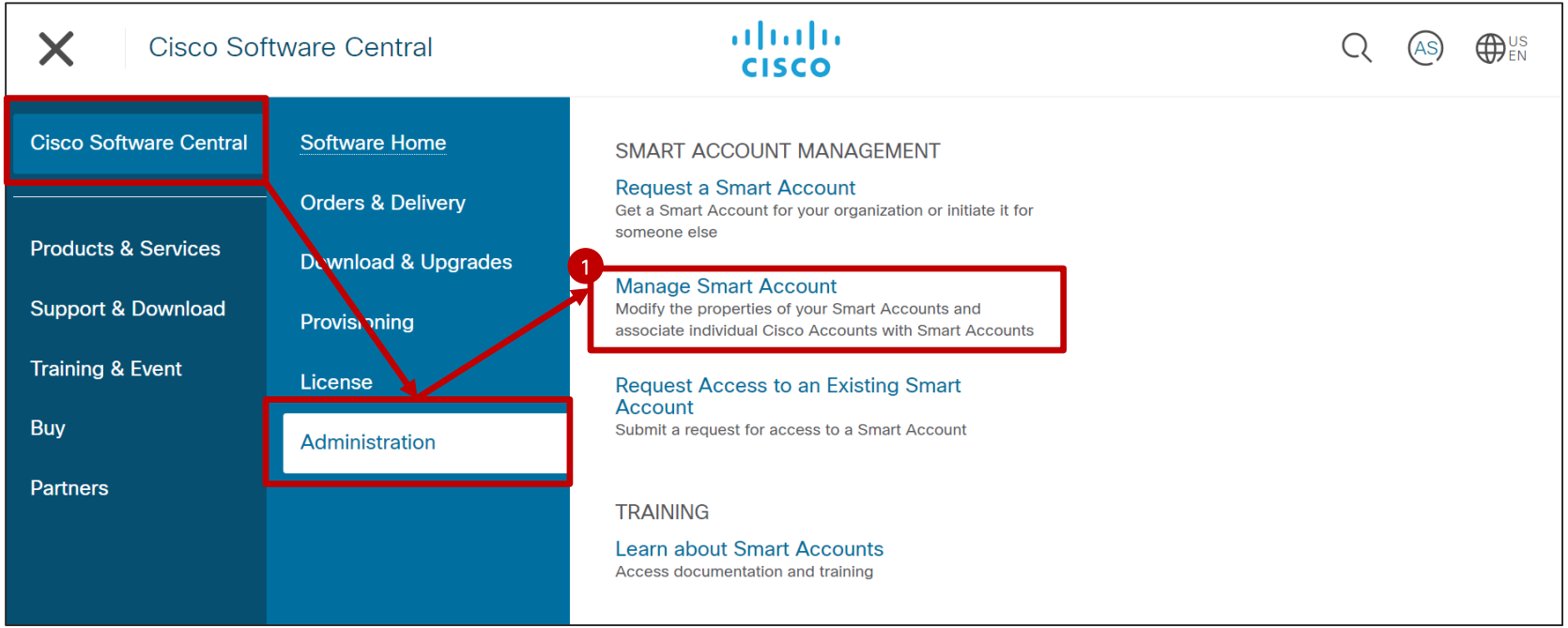
How to Create a New Virtual Account
Manage Smart Accounts

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



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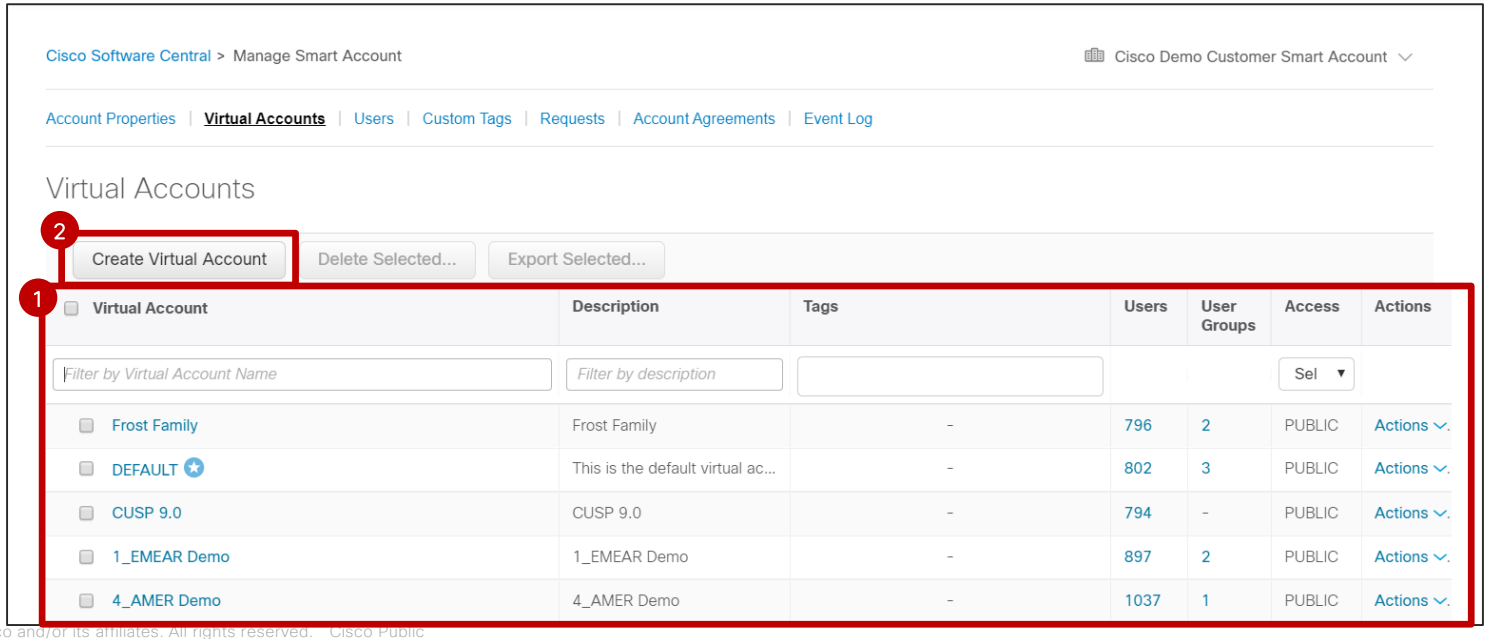
How to Create a New Virtual Account

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.



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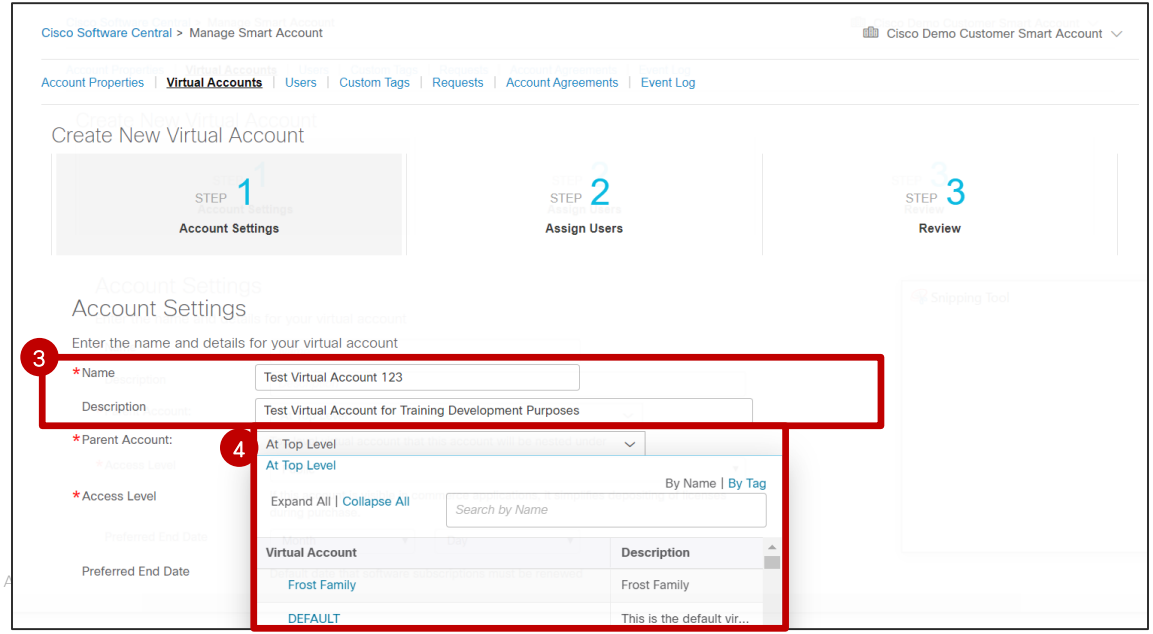
How to Create a New Virtual Account

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.*



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Create a New Virtual Account

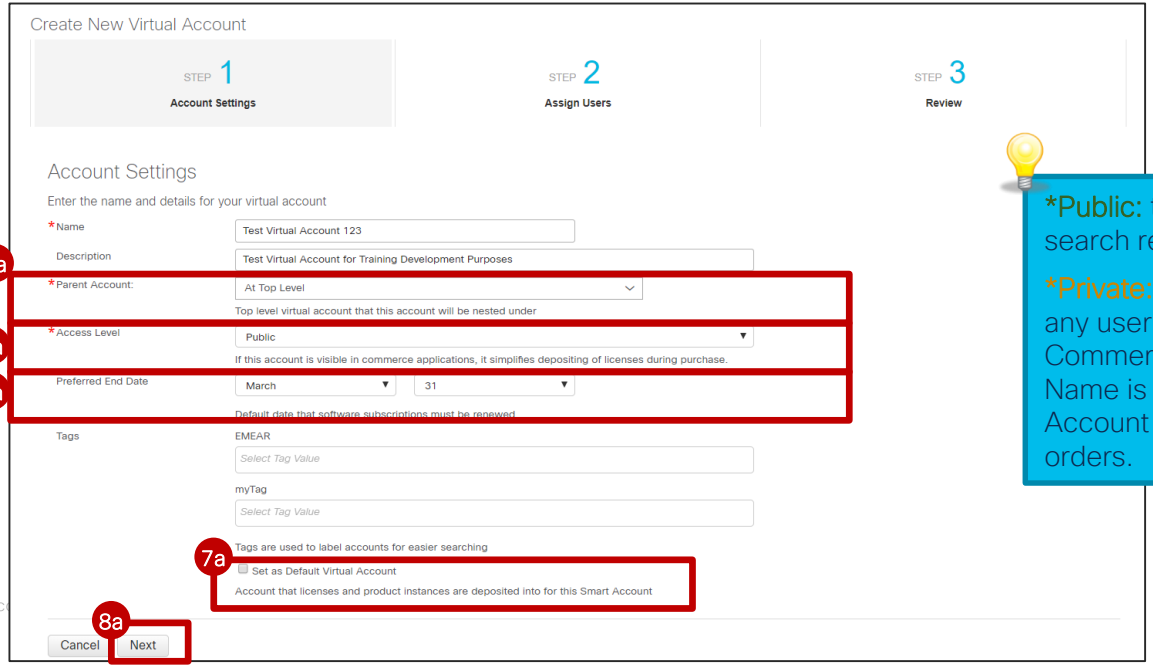
4a If you need to **create a Virtual Account at Top Level**, select **Parent Account – At Top Level**.

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.**



*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.

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How to Create a New Virtual Account

Create a New Virtual Account

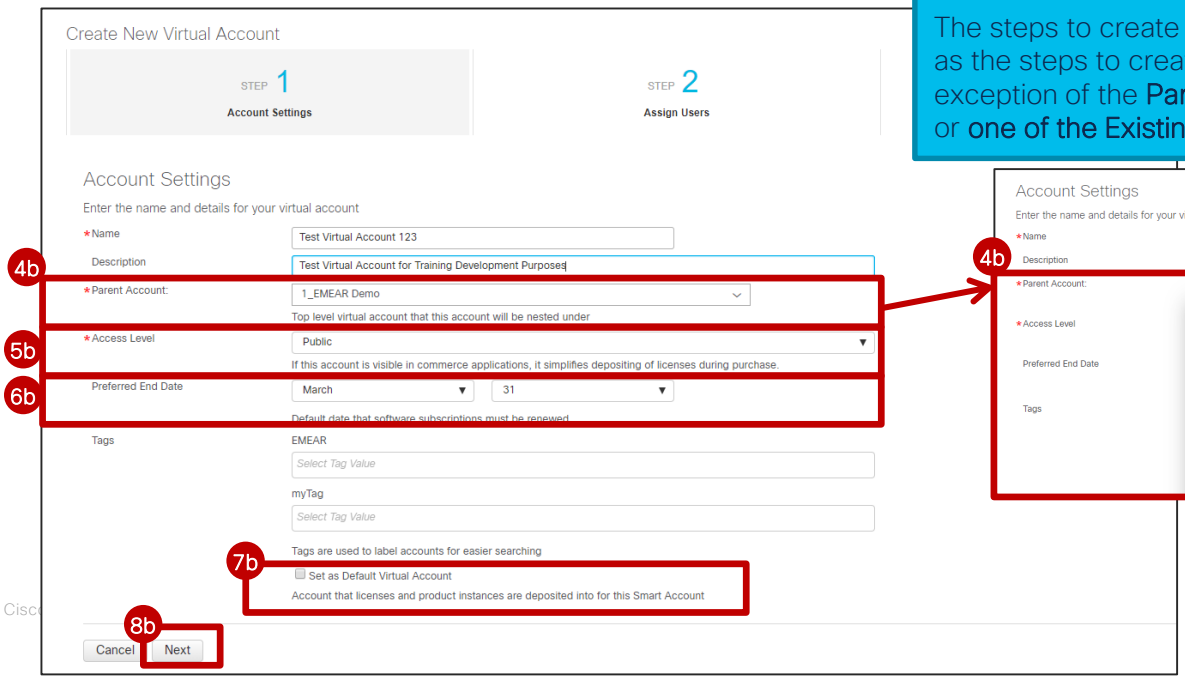
4b If you need to **create a Nested Virtual Account**, select a **Parent Account (one of the existing VAs)**.

5b In addition, you have to set the **Access Level**: there are two options, **Public** or **Private***.

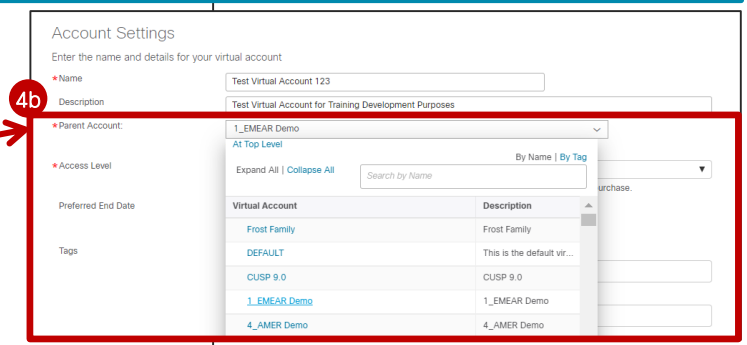
6b You can select a **Preferred End Date** for your Subscriptions.

7b Optionally, you can **set this Virtual Account as the Default Virtual Account**.

8b Click on **Next**.



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**.



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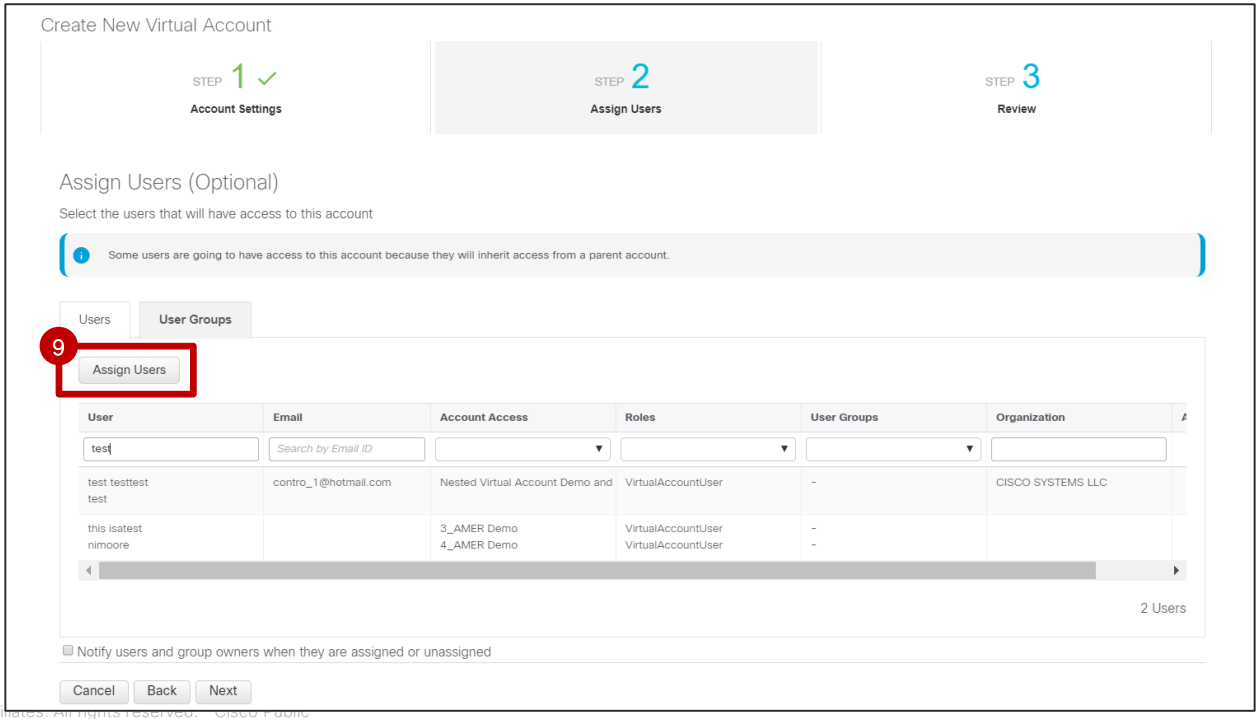
How to Create a New Virtual Account

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.



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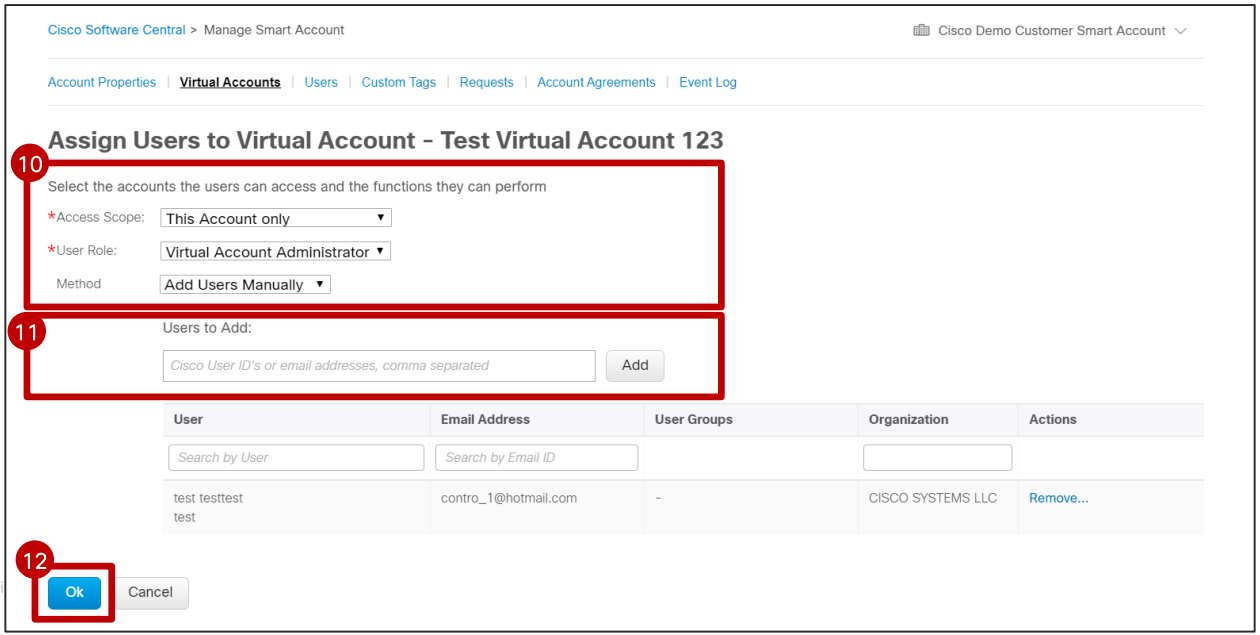
Create a New Virtual Account

10. 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*).
11. **Add Users**: enter Cisco User IDs or email addresses and **click Add**.
12. To confirm, **click OK**.



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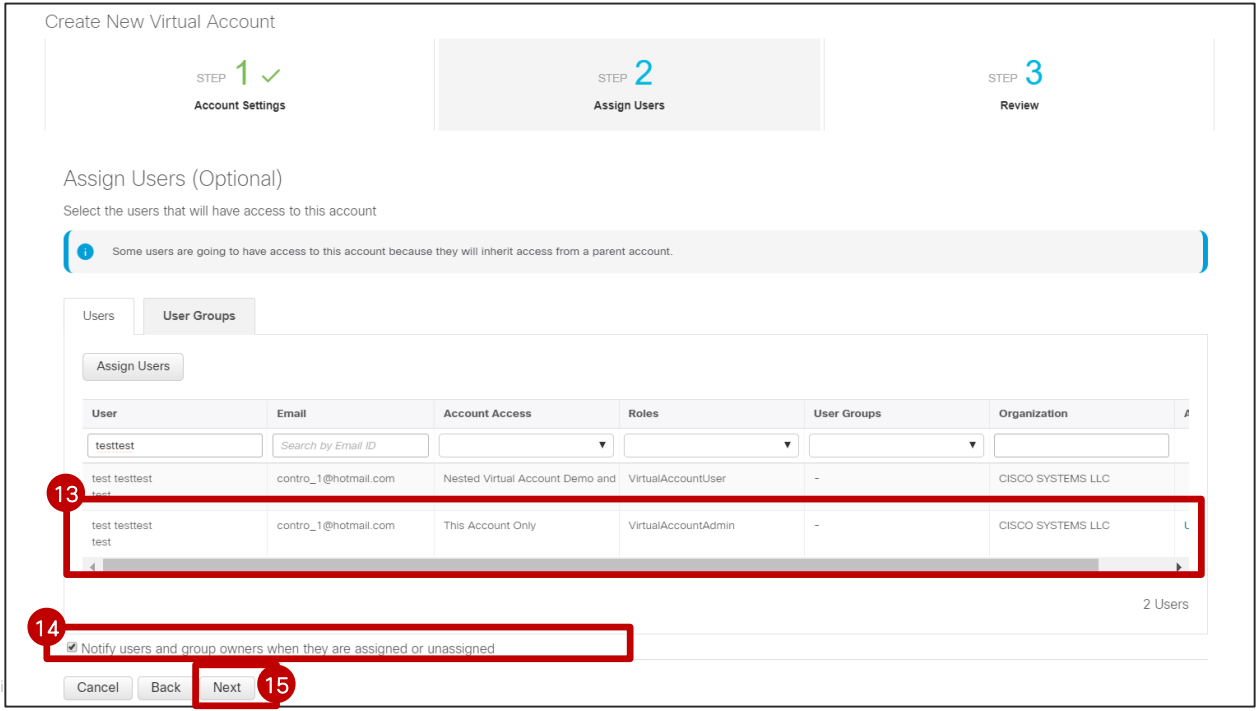
Create a New Virtual Account

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**.



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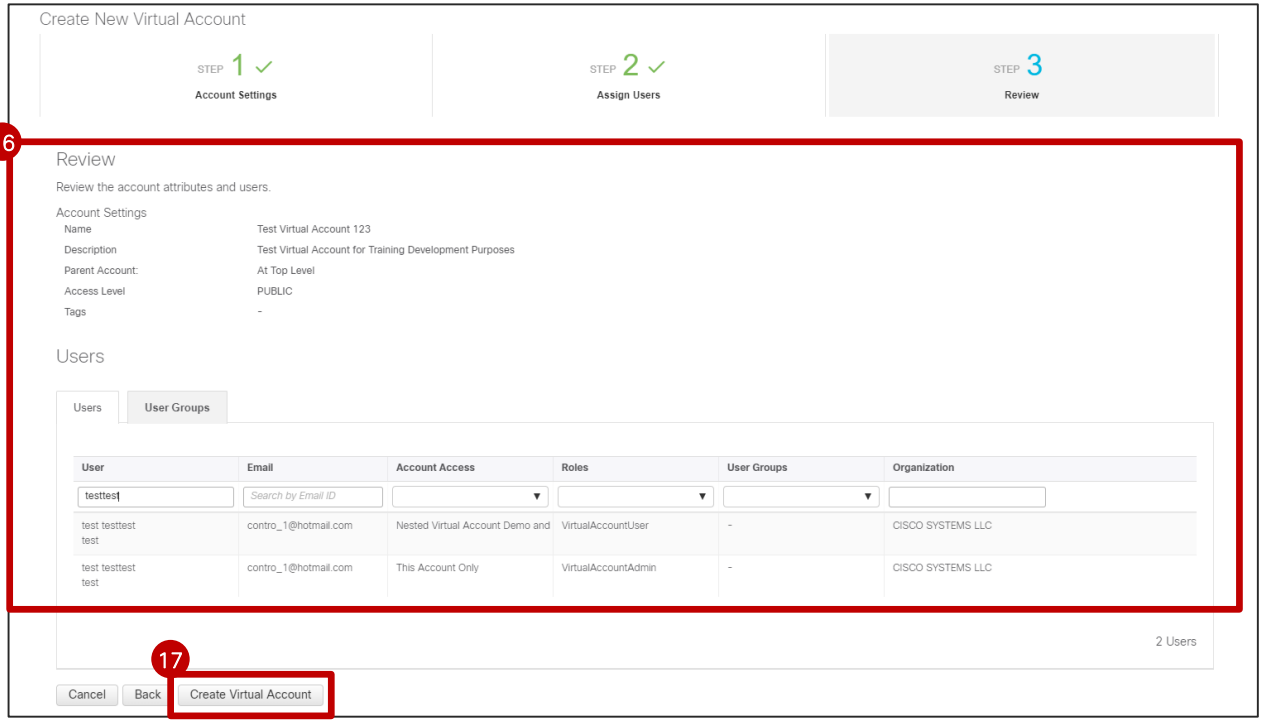
Create a New Virtual Account

16 Review the Virtual Account Attributes and Users.

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



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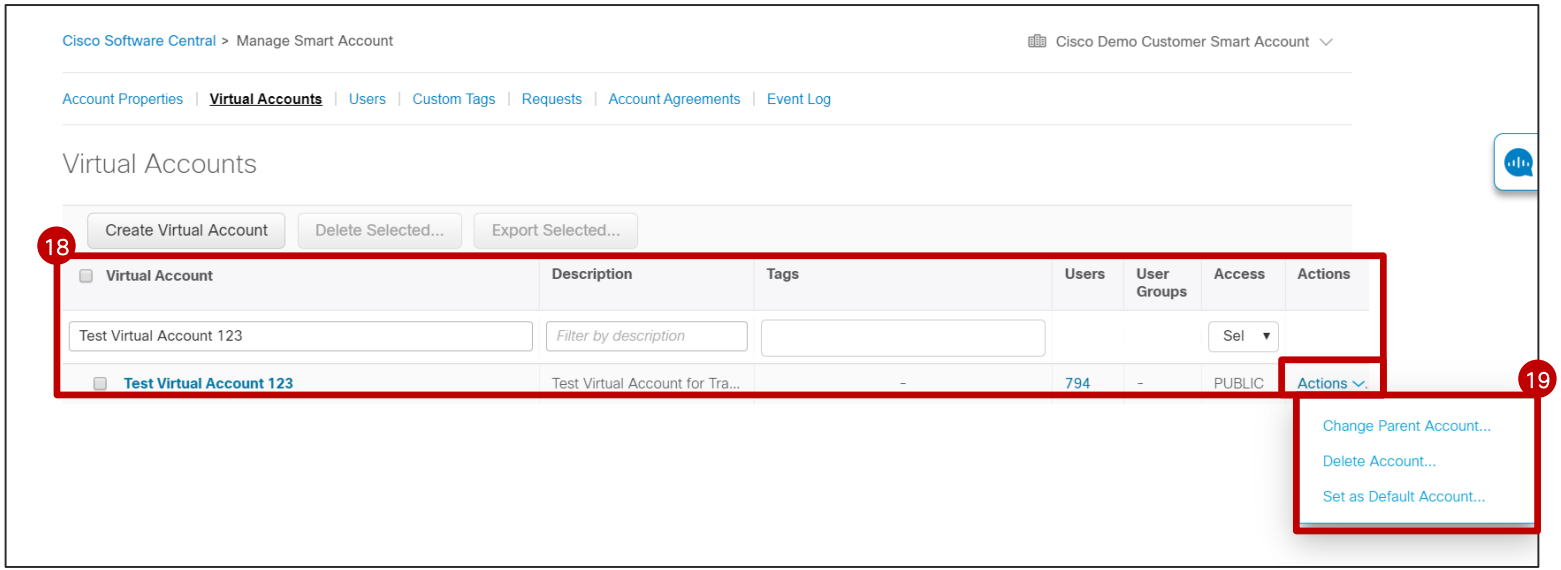
How to Create a New Virtual Account

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)**.



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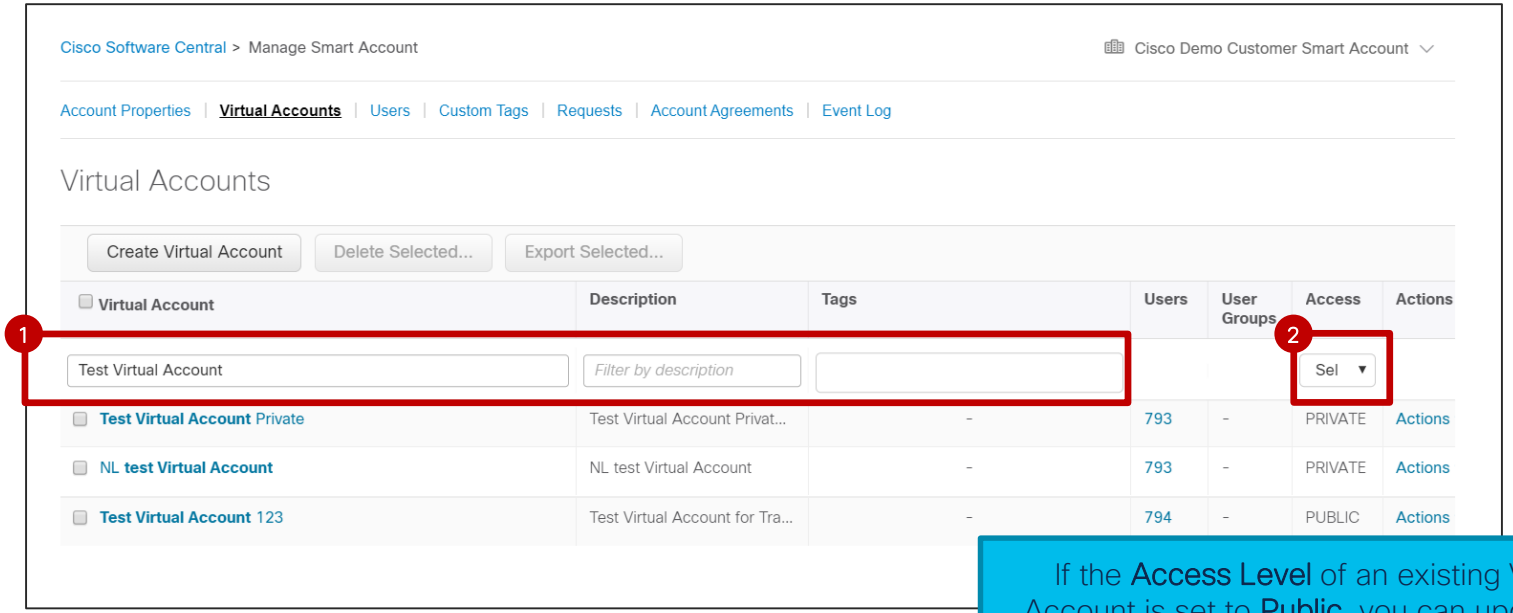
How to Create a New Virtual Account

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).



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

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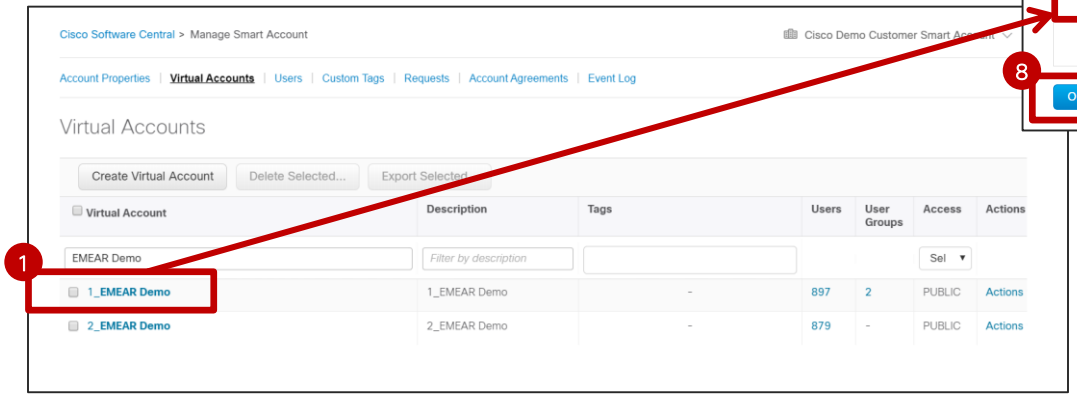
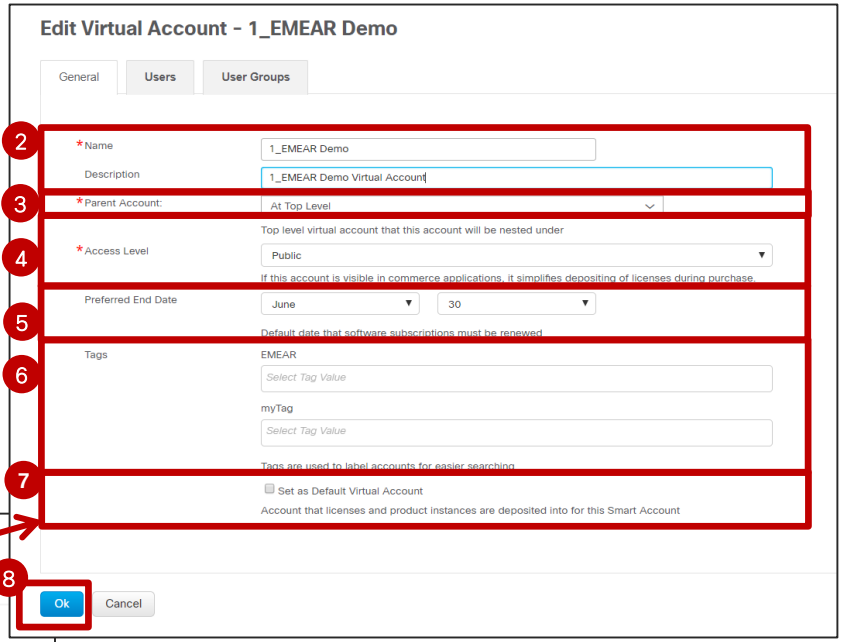
Edit Virtual Accounts

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).





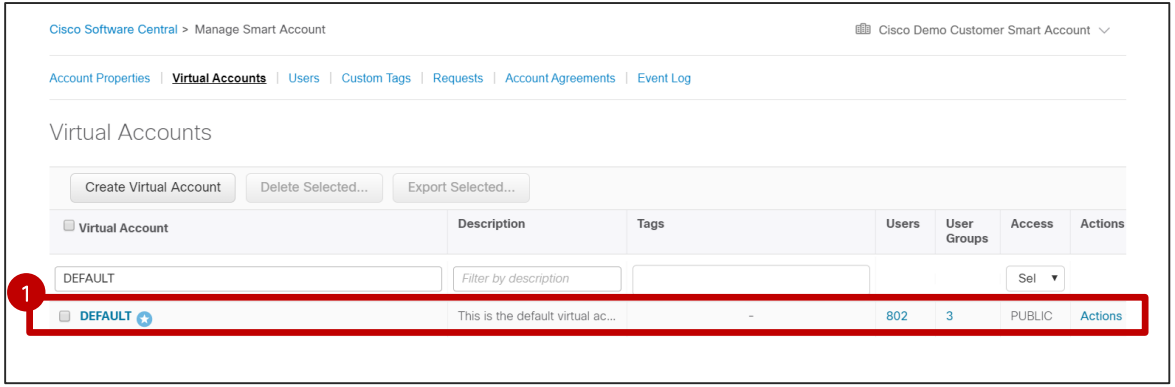
Remember to save your changes.

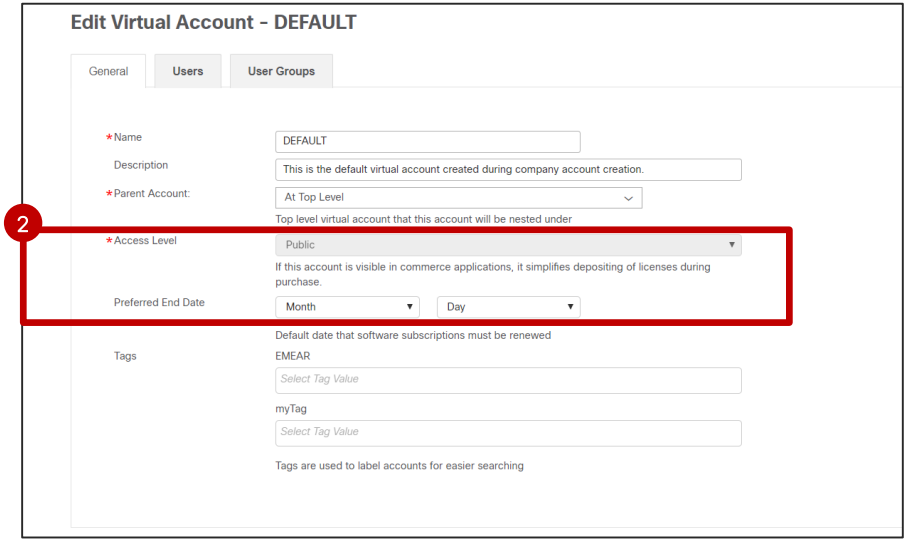
Default Virtual Account

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.

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.

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





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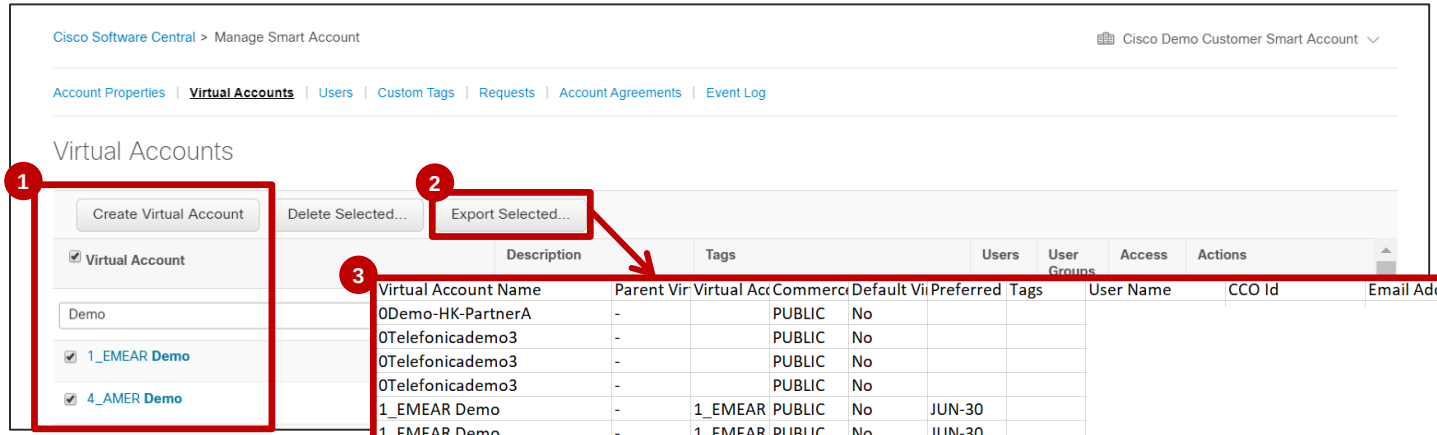
Export Virtual Accounts

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.



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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							
0Telefonicademo3	-		PUBLIC	No							VirtualAccountUser
0Telefonicademo3	-		PUBLIC	No							VirtualAccountAdmin
0Telefonicademo3	-		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

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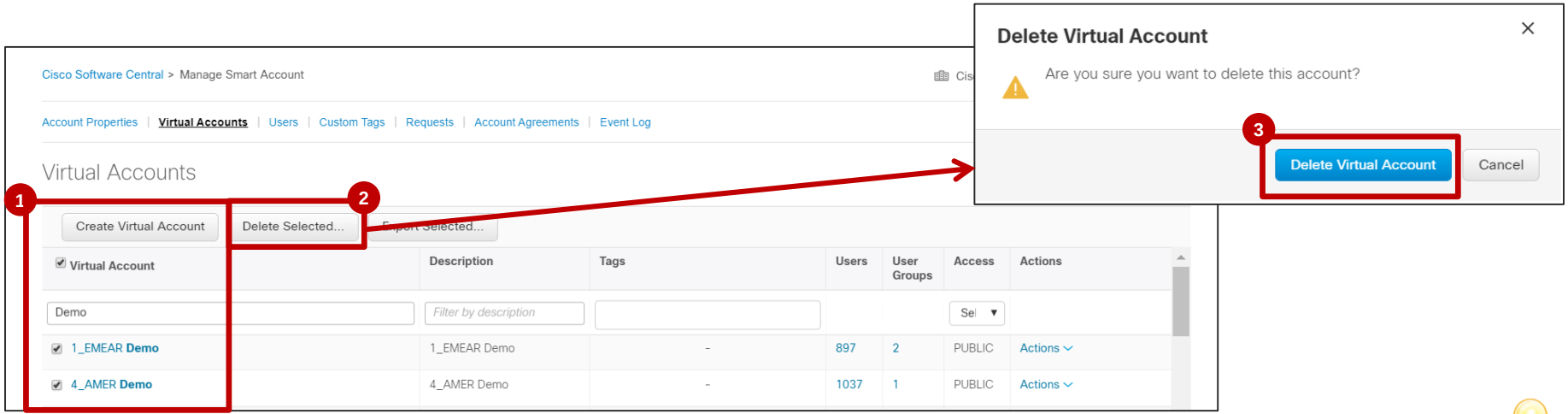
Delete Virtual Accounts

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**.



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

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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.

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