



# Connecting the Dots: Smart Account and Smart License Learning Series

## Getting Started with Your Smart Account and Smart Licenses

Smart Account supports Smart Licenses. Smart Licenses require a Smart Account.

### Get Started!

1. Log in to [software.cisco.com](https://software.cisco.com) using your Cisco ID.
2. Select [Manage Smart Account](#) under the **Administration** section to manage your Smart Account.
3. Select [Smart Software Licensing](#) under the **License** section to manage your Smart Licenses. **Smart Software Licensing** is also referred to as **Cisco Smart Software Manager (SSM)**.
4. Your view and available actions are based on your assigned role.



#### Things You do in 'Manage Smart Account'

1. Create a Virtual Account
2. Add Users and Manage Roles
3. Add User Groups
4. Tag a Virtual Account
5. View Contract/Agreement with Cisco

Check out our Resources-on-Demand:

- ✓ [Introduction to Smart Account](#)
- ✓ [Assign a Partner to Manage Your Smart Account](#)
- ✓ [Structure Your Smart Account](#)



#### Things You do in 'Cisco Smart Software Manager (CSSM)'

1. Check Alerts
2. View and Manage Smart Licenses
3. Register and Manage Devices
4. Convert Classic Licenses to Smart Licenses
5. Generate Custom Reports
6. Enable Smart License Notifications
7. View and Manage Satellites
8. View License Activity

Check out our Resources-on-Demand:

- ✓ [Introduction to Smart Software Licensing](#)
- ✓ [Manage Your Smart Licenses in Cisco SSM](#)

## Manage Your Smart Account

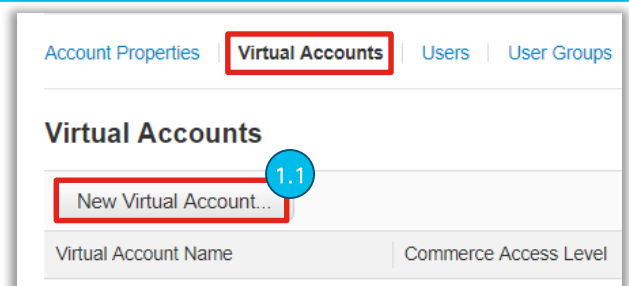


### 1. Create a Virtual Account

1.1. Create Virtual Accounts in the Accounts tab to organize all of your licenses and devices within your Smart Account.

Check out our Resources-on-Demand:

- ✓ [Create a Virtual Account](#)
- ✓ [Tag a Virtual Account](#)
- ✓ [Best Practices for VA Tagging](#)



## 2. Add Users and Manage Roles

2.1. Use the **Users** tab to:

- Control access and assign users to specific Virtual Accounts
- Grant management rights to users within a Virtual Account

Check out our Resources-on-Demand:

- ✓ [Smart Account Roles](#)
- ✓ [Add New User](#)
- ✓ [Search](#)

Account Properties | Virtual Accounts | **Users** | User Groups | Cus

**Account Users** | Company Users

User Groups Users

NOTE: You can allow resellers authorized by Cisco to resell our products (your "Authorized Channel") by creating a New User, you agree that your Authorized Channel is acting on your behalf, that you are not an Authorized Channel.

**2.1** New User(s)... Send Message

## 3. Add User Groups

3.1. Use the **User Groups** tab to:

- Add and delete User Groups
- Manage Virtual Account access
- Request access to external Smart Accounts and span user groups across multiple Smart Accounts
- Send messages to the User Group

Check out our Resources-on-Demand:

- ✓ [User Groups](#)
- ✓ [User Group Across Multiple Smart Accounts](#)

Account Properties | Virtual Accounts | Users | **User Groups**

**3.1** New User Group

USER GROUP	USERS
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## 4. Tag a Virtual Account

4.1. Use the **Custom Tags** tab to:

- Create Custom Tags at the Virtual Account level (e.g. Department, Geography, Technology group, etc.)
- Choose values for each tag

Check out our Resources-on-Demand:

- ✓ [Add Virtual Account Tag](#)
- ✓ [Best Practice: SA, VA and License Tagging](#)

Account Properties | Virtual Accounts | Users | User Groups | **Custom Tags**

**Virtual Account Custom Tags**

**4.1** New Virtual Account Custom Tag

Virtual Account Custom Tag Name	Description
Country	-

## 5. View Contract/Agreement with Cisco

5.1. Use the **Account Agreements** tab to:

- View and sign the Smart Software Licensing terms of agreement

Account Properties | Virtual Accounts | Users | User Groups | Custom Tags | Access Requests | **Account Agreements**

**Account Agreements**

**5.1** Updated Smart Software Licensing Agreement  
Please review and indicate acceptance of the updated Cisco Smart Software Licensing Agreement's terms and conditions.

Date	Agreement	Status
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## 1. Check Alerts

1.1. Use the **Alerts** tab to view:

- Major alerts that require immediate user action
- Minor alerts that do not require immediate action
- Information alerts that do not require any action



Check out our Resources-on-Demand:

- ✓ [Manage Your Smart Licenses](#)



## 2. View and Manage Smart Licenses

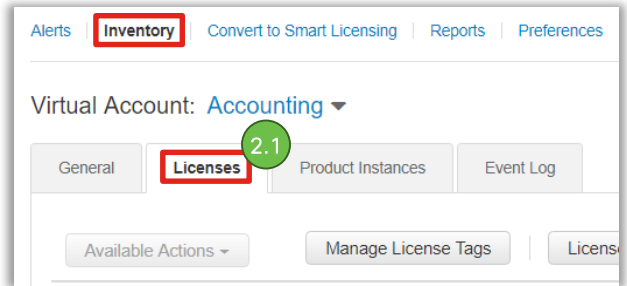
2.1. Use the **Licenses** tab to:

- Manage licenses i.e. transfer, upgrade, tag and port licenses
- Check license usage and availability



Check out our Resources-on-Demand:

- ✓ [Add, Delete and Manage License Tag](#)
- ✓ [Bulk Operations](#)



## 3. Register and Manage Devices

3.1. Use the **General** tab to:

- Generate tokens to register a product/device
- After registration, the product/device will be visible in **Product Instance** tabs.

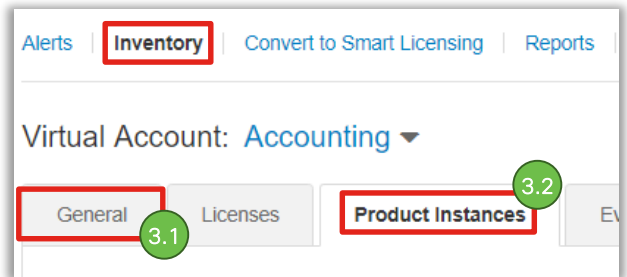
3.2. Use the **Product Instances** tab to:

- View registered products/devices
- Transfer or remove products/devices



Check out our Resources-on-Demand:

- ✓ [CSSM Product Registration](#)



## 4. Convert Classic Licenses to Smart Licenses

Use the **Convert to Smart Licensing** tab to:

- 4.1. Convert Classic Licenses on a PAK or on a device to a Smart License
- 4.2. Check the license conversion status
- 4.3. Modify your Smart License conversion settings



Check out our Resources-on-Demand:

- ✓ [Convert Classic Licenses to Smart Licenses](#)
- ✓ [Assign a Classic PAK-based license to a Smart Account](#)





## 5. Generate Custom Reports

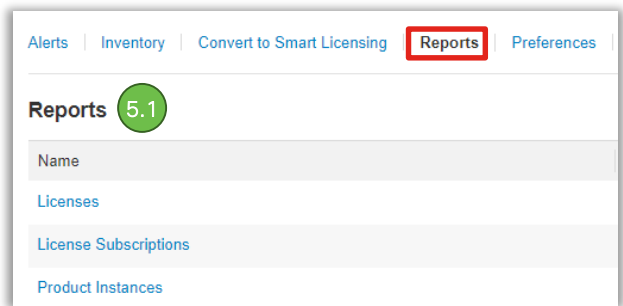
5.1. Use the **Reports** tab to generate custom reports for:

- Licenses
- License Subscriptions
- Product Instances



Check out our Resources-on-Demand:

- ✓ [Manage Your Smart Licenses](#)



## 6. Enable Smart License Notifications

6.1. Use the **Preferences** tab to enable email notifications for your Smart Licenses.

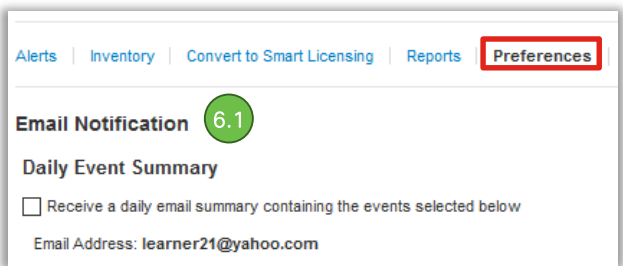
Notification types include:

- Daily Smart License event summaries
- Satellite synchronization status notifications



Check out our Resources-on-Demand:

- ✓ [Manage Your Smart Licenses](#)



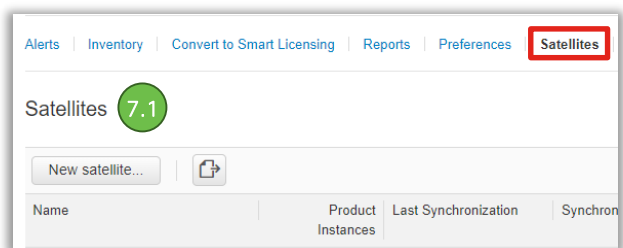
## 7. View and Manage Satellites

7.1. Use the **Satellites** tab to manage your Satellite configuration, track your Satellite activity and upload a sync file from Satellite to Cisco Smart Software Licensing.



Check out our Resources-on-Demand:

- ✓ [Introduction to Cisco SSM satellite](#)
- ✓ [Smart Software Manager satellite Enhanced Edition Setup](#)
- ✓ [User Guide](#)



## 8. View License Activity

8.1. Use the **Activity** tab to view all license transactions and the event log of all activities happening in the Smart Account.



## Additional Support

For Smart Account questions, email: [sa-adoption-support@external.cisco.com](mailto:sa-adoption-support@external.cisco.com)

For Smart Licensing questions, email [Licensing@cisco.com](mailto:Licensing@cisco.com)

Information Links:

- [Cisco Smart Software Licensing Homepage](#)
- [Cisco Smart Accounts Homepage](#)