



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 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 (CSSM)**.
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 Notifications

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 and Upload Usage 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](#)
- ✓ [Introduction to Smart License Using Policy](#)

Manage Your Smart Account

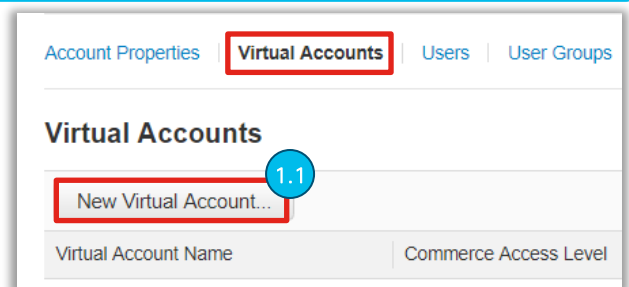


1. Create a Virtual Account

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](#)

The screenshot shows the 'Users' tab selected in the navigation menu. Below the navigation, there are tabs for 'Account Users' and 'Company Users'. A toggle switch for 'User Groups Users' is visible. A note states: 'NOTE: You can allow resellers authorized by Cisco to resell our products (your "Authorized Channel" account). When creating a New User, you agree that your Authorized Channel is acting on your behalf, that you are not a reseller.' At the bottom, there is a 'New User(s)...' button and a 'Send Message' button. A red box highlights the 'Users' tab and the 'New User(s)...' button. A blue circle with '2.1' is placed over the 'New User(s)...' button.

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](#)

The screenshot shows the 'User Groups' tab selected in the navigation menu. A 'New User Group' button is highlighted with a red box. Below it is a table with columns 'USER GROUP' and 'USERS'. A blue circle with '3.1' is placed over the 'New User Group' button.

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](#)

The screenshot shows the 'Custom Tags' tab selected in the navigation menu. Below the navigation, there is a 'New Virtual Account Custom Tag' button highlighted with a red box. Below that is a table with columns 'Virtual Account Custom Tag Name' and 'Description'. A blue circle with '4.1' is placed over the 'New Virtual Account Custom Tag' button.

5. View Notifications

5.1. Use the **Notifications** tab to:

- Review pending and completed Smart Software Licensing Notices
- Customize your Notification Preferences

The screenshot shows the 'Notifications' tab selected in the navigation menu. Below the navigation, there are two buttons: 'Notifications' and 'Notification Preferences', both highlighted with red boxes. A blue circle with '5.1' is placed over the 'Notifications' button.



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

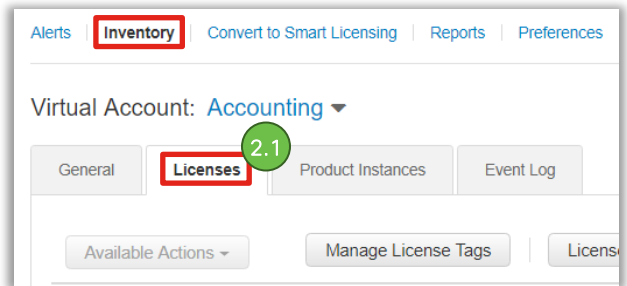
2.1. Use the **Licenses** tab to:

- 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.

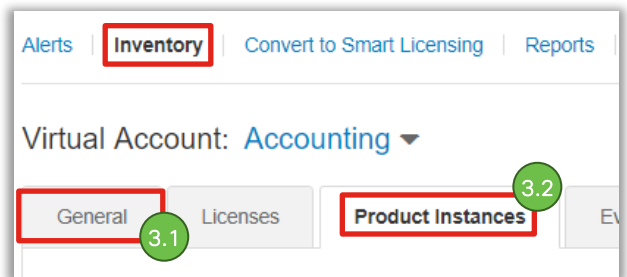
3.2. Use the **Product Instances** tab to:

- 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

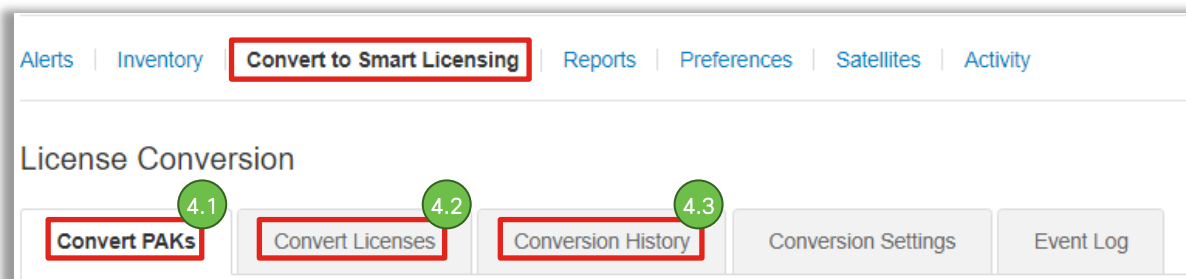
Use the **Convert to Smart Licensing** tab to:

- 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 and Upload Usage Reports

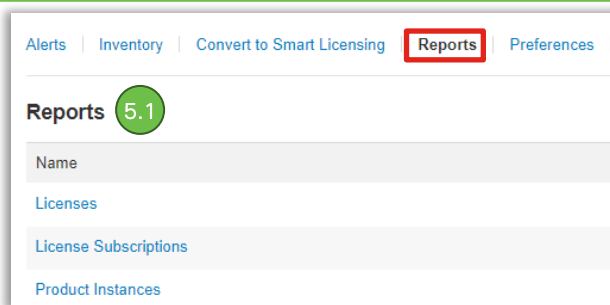
5.1. Use the **Reports** tab to generate custom reports for:

- Licenses
- License Subscriptions
- Product Instances

5.2 Upload usage reports for SL using Policy

Check out our Resources-on-Demand:

- ✓ [Manage Your Smart Licenses](#)
- ✓ [Smart Licensing Using Policy](#)



6. Enable Smart License Notifications

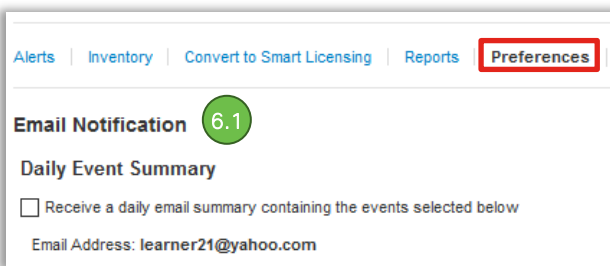
6.1. Use the **Preferences** tab to enable email notifications for your Smart Licenses.

Notification types include:

- Daily Smart License event summaries
- Satellite synchronization status notifications

Check out our Resources-on-Demand:

- ✓ [Manage Your Smart Licenses](#)

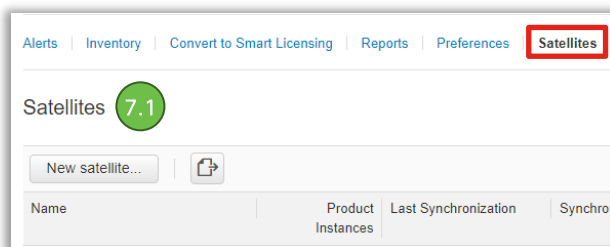


7. View and Manage Satellites

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, open a case using [Support Case Manager](#)

For Smart Licensing questions, open a case using [Support Case Manager](#)

Information Links:

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