Simplifying the Cisco Software Experience
Smart Software License & Classic PAK Management with Smart Accounts for Channel Partners

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August 2015
Agenda

1. Smart Accounts for Traditional PAKs in LRP
2. Smart Licensing Management in Smart Software Manager (SSM)
3. Convert PAKs to Smart Licenses in LRP
Smart Licensing Enabled Products

The following product families are currently smart licensing enabled. A Smart Account is required to purchase an item from this list.

- Cisco Series Aggregation Services Routers (ASR 9000)
- Converged Broadband Router (CBR-8)
- Cisco Cloud Services Router 1000v (CSR1Kv)
- Cisco Unified SIP Proxy (CUSP)
- Cisco 5921 Embedded Services Router (5921)
- Adaptive Security Virtual Appliance (ASAv)
- Securities Services Provider (SSP 3RU)
- Cisco Prime Virtual Network Analysis Module (vNAM)
- Aggregation Services Routers Next Generation (ASR NG)
- UCS Central
- Wireless LAN Controller – vWLC, 5520, 8540

Note: This product family list is as of 01/28/2016. See full list of orderable Smart Licensing PIDs here. The Smart Licensing Product Roadmap is available here.
Connected Smart Account Experience
Managing Classic PAK and Smart Licenses

Software.cisco.com is the one stop website for all your Software Licensing Needs.

Traditional Licenses and Smart Licenses are managed in separate tools, accessible through CSC.
Smart Accounts for Traditional PAKs in LRP
Smart Accounts in LRP
Login to Product License Registration Tool

1. Login into Cisco Software Central (CSC). On the CSC Home page, click License or look under the License section.
2. From License section, click Traditional Licenses.
Accessing your Smart Account

Smart Account View of PAK Licenses

1. Now you can filter by smart account to view the classic licenses for all licenses associated with that Smart Account (from multiple users), rather only the licenses you have access to individually, providing more complete view of your PAK licenses.
Smart Accounts in LRP
View Classic PAK Licenses

1. If you do not have a Smart Account the dropdown will only have your CCO ID and you will be able to view your PAKs, Licenses, Devices and Transactions History.

2. If you have access to a Smart Account, you can select the Smart Account and view PAKs/licenses for a specific Virtual Account. From there you can manage your PAKs/Tokens, Licenses, Devices and Transactions History.

Note: if your orders were assigned to a Smart Account, the respective PAKs will be automatically deposited in your Smart Account in LRP.
Smart Accounts in LRP

Virtual Account automatic selection

3 Once you select the Smart Account, you will be able to view and manage PAKs/Tokens, Licenses, Devices and Transactions History related to this specific Smart Account.

4 When you select a Smart Account from the Smart Account dropdown selector, a Virtual Account selection is automatically made and will default to the Customer’s Default Virtual Account.
Assign Classic PAKs to Smart Accounts

Select PAKs to Assign

1. Click **PAKs/Tokens**. All PAKs associated with the user are displayed.

2. Check the unfulfilled or partially filled* PAKs to assign them to a Smart Account and specific Virtual Account.

Once they are assigned to a Smart Account, you can view all PAKs associated with the Smart Account, not only the PAKs associated to you individually.

*The most common case is to assign unfulfilled or partially fulfilled PAKs to Smart Account since the license is still available for consumption. However, even “Fulfilled” PAKs can be assigned to a Smart Account via this option.
Assign Classic PAK Licenses to Smart Accounts

Assign License to Smart Account

1. To cascade Smart Account Assignment to multiple PAKs, select multiple PAKs and under the Actions drop-down menu, click Assign to a Smart/Virtual Account, or
2. From Assign from a specific PAK at the line level.
Assign Classic PAK Licenses to Smart Accounts
Assign License to Smart Account (cont.)

1. In the dialog box, select the appropriate smart account and specify a Virtual Account. Only the Smart and Virtual Accounts you have access to will display.

2. Click Assign.
Smart Licensing Management in Smart Software Manager (SSM)
SSM provides a Software Inventory Management System that provides Customers, Cisco, and Selected Partners with information about Software Ownership and Software Utilization for Smart Licenses.

- Only Smart Licenses deposited in Customer Smart Accounts are managed in SSM.
  - Manage inventory from one centralized website.
  - Organize and view licenses in groups called virtual accounts.
  - Transfer Licenses easily between virtual accounts.

**Ownership**

**Commerce (CCW)**
I Have Purchased 5 additional ‘Advanced’ Licenses for BigU.edu

**‘Smart’ Account**

**Usage**

Hello, I am Device-East5, I belong to BigU.edu and I am using 1x Advanced License

Hello, You are Device-East5, belonging to BigU.edu and the Physics department you are ‘In-Compliance’

<table>
<thead>
<tr>
<th>BigU.edu</th>
<th>I Own: 10</th>
<th>+5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>I am Using: 10</td>
<td>+1</td>
</tr>
</tbody>
</table>

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If you have access to multiple Customer Smart Accounts, you can toggle between them.

1. Click the arrow. If there are more accounts than listed, you can also click on expand to view more.
Basic Portal Navigation

Access SSM

1. From Cisco Software Central (CSC), click Smart Software Licensing.
This notification displays when logging into SSM for the first time or when a new agreement needs to be accepted. Agreement must be accepted to generate tokens and connect product instances to consume licenses.

If you have authority to accept the agreement, click **View/Accept**, or click **Continue** to defer agreement.

Review the agreement. If you agree with the terms, and click **Accept**.
Basic Portal Navigation

License Agreement

1. If the agreement wasn’t accepted upon initial login, there will **not** be an option to generate tokens and you can accept the agreement from the General Tab.

2. Click the hyperlink to view and accept agreement so you can generate tokens. Please note that by accepting the agreement you will become the Smart Account Approver.
Basic Portal Navigation

Layout – Navigation

1. The Smart Software Manager has 6 tabs and provides visibility to Alerts. You can view all major and minor alerts. At the Virtual Account and Smart Account Level, when license expiration alert messages are generated for licenses that are part of a subscription, the word ‘term’ is added after the license type.

2. Throughout the tool, click the export icon to download the information in that tab.

The original SSM version was decommissioned on November 15th, 2015. If you access the legacy link: https://tools.cisco.com/rhodui/index you will be automatically redirected to the new version of SSM.
Alerts
Major & Minor

1. View alerts for the entire Smart Account in one location.
2. Major alerts are red and Minor alerts are in yellow. Click **Action** to resolve any issues or dismiss alerts.
3. View alerts by Virtual Account in the Inventory tab. Click Header level icon to expand message.

Any license or product instance that is not in compliance with the licensing agreement creates an alert. (e.g. more licenses in use than purchased)

At the Virtual Account and Smart Account Level, when license expiration alert messages are generated for licenses that are part of a subscription, the word ‘term’ is now added after the license type.
Inventory - Tab

General

1. In the Inventory – General Tab, view Virtual Account details for the selected Virtual Account. Toggle between Virtual Accounts by clicking the arrow. Virtual Accounts are created in CSC.

2. You can also generate tokens to register new product instances to the Virtual Account.

Remember: A Virtual account is a subset of a smart account used to internally organize licenses.

Default Virtual Accounts
- Indicated with Blue Star Icon
- If items were assigned to the overall Smart Account and not a specific Virtual Account, licenses will be deposited into the default Virtual account.
- Before setting up Virtual Accounts in CSC, all smart licenses will display in the default account in the Licenses tab.
Inventory
General – Register Product Instance to Virtual Account

1. In the General tab of virtual account, click **New Token**.
2. Enter a description and the number of days that you want the token to be valid for. Select the checkbox for export-controlled functionality and accept the terms and responsibilities. Click **Create Token**.

A **Token** is required to register the product. Once the product is registered, the registration token is no longer necessary and can be revoked and removed from the table. Registration tokens can be valid from 1 to 365 days.
1. Click **Copy** to copy the newly created token.

A **Token** is required to register the product. Once the product is registered, the registration token is no longer necessary and can be revoked and removed from the table. Registration tokens can be valid from 1 to 365 days.
You will configure the device to your specifications. One of the commands will include entering the token to register your device so that it can communicate to the Smart Software Manager.

- Smart Call Home should be configured on the device. Here is an example of a Smart Call Home configuration:

```
call-home contact-email-addr sch-smart-licensing@cisco.com profile "CiscoTAC-1"
  active
  destination transport-method http
  no destination transport-method email
  destination address http
  https://tools.cisco.com/its/service/oddce/services/DDCEService
  no destination address http
  https://tools.cisco.com/its/service/oddce/services/DDCEService
```
Inventory
Configure Device

2. Open a terminal window for the device and paste these commands in the Smart Software Licensing configuration commands. This is an example for a CSR configuration.

a. (config)license smart enable

b. (exec)license smart register idtoken
   NzkxOGQzZDEtY2E3NS00MzJhLWE1NmEtMDhjMmVjM2YyYWU4LTEzODI4OTYw%0AOOTcwMTh8WmtXWnh2TXkwUU6RTdsZStTNlh5UV6Y3loYXo5R3RqbE1pYnpM%0AMVI2TT0%3D%0A

c. (config)license boot level premium
Inventory Licenses

1. View License inventory, their usage, which accounts have a surplus or shortage, and alerts. This keeps you informed on your licenses and actions needed to maintain compliance.
2. Alerts at line level indicate when licenses are expiring soon, so you know when to renew licenses. It will also notify you if you have insufficient licenses. This will ensure you remain in compliance.

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Insufficient License Alerts occur when more licenses are in use than are purchased. To remedy this issue:

- Transfer available licenses from another Virtual Account
- Purchase more licenses to return to compliance
Click a license to view more details, such as Virtual Account usage, license expiration, product instances, event log, and order history.
Inventory
Licenses - Transfer

1. Easily transfer licenses to other Virtual Accounts to fulfill license needs in other parts of the company. In the License tab of the Virtual account you want to transfer licenses from, click Transfer.

2. Select the Virtual Account that you want to transfer the license to and enter quantity to transfer.

3. Click Preview to see resulting licenses count or click Complete Transfer.

![Transfer Licenses screenshot]

- Transfer: Choose the account to transfer licenses to.
- Quantity: Enter the number of licenses to transfer.
- Preview: View the result before transferring.
- Complete Transfer: Finalize the license transfer.

Table Example:

<table>
<thead>
<tr>
<th>License Description</th>
<th>Quantity</th>
<th>In Use</th>
<th>Surplus</th>
<th>Alerts</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>CBR8 Supervisor 10G Port License Feature</td>
<td>8</td>
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<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBR8 DOCSIS 3.0 Downstream Channel License Feature</td>
<td>364</td>
<td>0</td>
<td>364</td>
<td></td>
<td>Transfer</td>
</tr>
<tr>
<td>CBR8 DOCSIS 3.0 Upstream Channel License Feature</td>
<td>364</td>
<td>0</td>
<td>364</td>
<td></td>
<td>Transfer</td>
</tr>
</tbody>
</table>

Note: ![Alert Icon] for licenses expiring.
Managing the Devices
Product Instances
What are Product Instances?

- A product instance is an individual device with a unique device identifier (UDI) that is registered using a product instance registration token.
- The token is specific to the Virtual Account and you can register several instances of a product with a single registration token.
- Each product instance can have one or more licenses that reside in the same virtual account.

Register Product Instance Using Token

Hello, I am Device-East5, I belong to BigU.edu and I am using 1x Advanced License

Hello, You are Device-East5, belonging to BigU.edu and the Physics department you are ‘In-Compliance’

Token connects product to the Virtual Account and consumes license from that Virtual Account
New product instance information is displayed.
Inventory
Product Instance Details

1. In the Product Instance tab, product instances display.
2. Click the product instance for more details on license usage and event log.

Any license or product instance that is not in compliance with the licensing agreement creates an alert. (e.g. more licenses in use than purchased)
Inventory
Transfer Product Instances

1. Under Action dropdown, click **Transfer**.
2. In the **Transfer Product Instance** dialog box, select the Virtual Account to transfer to and click **Ok**.
3. Click on ‘remove’ in order to un-register a product to a license.

Transferring a product instance from one virtual account to another virtual account does not result in the corresponding licenses being transferred. You will have to transfer the licenses separately.

When you remove a product instance from the software, you are removing it only from the table. The licenses that the product instance was using are still available and can be used by other products. You must re-register the product instance with the cloud so that it can communicate with the product again.
Inventory

Event Log

1. In the Event Log tab, view recent activities and alerts of the Virtual Account to easily troubleshoot license and product inventory.
Reports, Notifications, Satellite, and Activity
Generate reports for selected Virtual Accounts: you can run reports in the tool (it will open in a web page of your browser), or export to CSV or XLS. Click on the report name (e.g. licenses) to view the report customization pop-up and run the report.

1. The **License report** provides a summary of licenses count and usage.
2. The **License Subscription report** is a summary of current subscription licenses counts and usage.
3. The **Product Instance report** includes count and listing of product instances.
Select the email notifications you would like to receive.

Click **Save** before transferring to a new page.
Satellites
Offline Connector

For security sensitive customers who do not want to manage their install base using a direct Internet connection, the Smart Software Manager satellite is installed on the customer premises, and provides a subset of Cisco SSM functionality.

1. On the main Satellites page, you will see any listed Satellites, and be able to create a New Satellite.
Upon selecting New Satellite, a pop-up will prompt you to enter the following information: Satellite Name, Registration File, Virtual Accounts, Contact Email Address.

Once you click on **Generate Authorization File**, a pop-up will appear through which you can download the authorization file by clicking Download Authorization File.

For more information on SSM Satellite setup and authorization file please check the **User Guide**.

Reference these documents for more information on using the satellite option:
- Data Sheet
- Overview
- FAQ
- **Satellite Cisco.com Page**
  - User Guide
  - Install Guide
Activity
Holistic View of License Transactions

1. On the Activity page, in the Transaction History tab, view License Transactions and additional details.

2. You can click on the Transaction Date link to view Transaction Details and Term Details.
Feedback & Support

Holistic View of License Transactions and Event Log

1. On all pages, there are links to provide feedback, raise a support case and for in tool help.
Convert from PAK Based to Smart License
Convert Classic PAK Licenses to Smart Licenses
Manage Unfulfilled / Partially Fulfilled PAK Licenses using Smart Licensing in SSM
Convert Classic Licenses to Smart Licenses
View Current Total of Smart Licenses in SSM

Currently there are 8 Smart Licenses in SSM. Once we convert classic licenses to Smart Licenses, more will be available in SSM.
Convert Classic Licenses to Smart Licenses

View of Licenses

1. In LRP, click **PAKs/Tokens**, the PAKs available for you to manage are displayed, as is any Smart Account Assignment information.

2. Select the unfulfilled/partially fulfilled PAKs that you want to convert to Smart licenses. A Smart equivalent SKU must be available.
1 Under the **Actions** drop-down menu, click **Convert to Smart Entitlements**.
Convert Classic Licenses to Smart Licenses

Convert to Smart Entitlements (cont.)

1. If you haven’t yet assigned the licenses to a Smart Account/Virtual Account, you will be prompted to do so at this time.
2. Reselect the SKUs to be converted and select the quantity.
3. Click Submit.

Note: The system asks for this confirmation since once these SKUs are converted, they cannot be used for future transactions in this tool. Instead, you can manage these licenses in SSM.
Convert Classic Licenses to Smart Licenses
Convert to Smart Entitlements (cont.)

The message confirming that the SKU conversion has been successful is displayed.
The status of the licenses now say converted. You can view here as a record, but will need to manage them in SSM now.
Convert Classic Licenses to Smart Licenses

View Increased Total of Smart Licenses in SSM

1. Log back into SSM. The license quantity has increased to 9, reflecting the licenses you converted. Now you can transfer these licenses to other virtual accounts and use the licenses management features available in SSM.

Once converted, you will need to register your product using the token Smart registration process.
Convert Classic Licenses to Smart Licenses

Event Log

2 The Event Log will display the transaction history for this conversion. Both Smart Account and Virtual Account will display the conversion entries.
Convert License on Device to Smart Entitlement
Convert license already registered on a device to Smart License
Convert License on Device to Smart Entitlement
Select Device to Convert Registered Licenses

1. In the Devices tab of LRP, select the device(s) that contain the licenses you wish to migrate to Smart Entitlements.
2. Click the device or Actions dropdown, and click Convert to Smart Entitlements.

All or none: All licenses on the device MUST have Smart equivalent SKU available.
Convert License on Device to Smart Entitlement

Select Smart Account

1. Select the Smart Account/Virtual Account you wish to deposit the licenses into. All Virtual Accounts you have access to will display.

2. Click **Ok** to proceed with conversion. *All licenses on the device will be converted to Smart licenses.*

Note: you can also assign the devices upfront to a Smart Account, following the same process as in the PAKs/Tokens tab.
Confirmation message displays. You will also receive an email notification. Your licenses have been removed from the LRP and are deposited into your Smart Account.
After the license migration is complete, the Smart Entitlements (licenses) will be reflected in the user’s specified Smart Account within Smart Software Manager (SSM). To register a device to those licenses, follow the token registration process in SSM.

1. The Event Log will display the transaction history for this conversion (both in the Smart Account and Virtual Account).
Customer Support
Submitting Cases

Software Licensing Support
- Customers with Software Licensing issues/questions can open a case using standard Cisco processes:

  Online
  Licensing@cisco.com
  Smart-support-team@cisco.com

  Email
  Phone

- Software Licensing Support Hours
  Monday – Friday: 8:00 am – 5:00 pm (US PT)

Product Support
- Technical Assistance Center (TAC)
  Customers can contact TAC for product support issues & questions using existing Cisco processes
### Additional Resources for Channel Partners

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<thead>
<tr>
<th>Location</th>
<th>Audience</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="http://cisco.com/go/smartaccounts">http://cisco.com/go/smartaccounts</a></td>
<td>All</td>
<td>Cisco Smart Accounts Overview</td>
</tr>
<tr>
<td><a href="http://cisco.com/go/smartlicensing">http://cisco.com/go/smartlicensing</a></td>
<td>All</td>
<td>Cisco Smart Software Licensing Overview</td>
</tr>
<tr>
<td>Software Operation Exchange Page Training Schedule Orderable Smart Licensing SKU List FAQ</td>
<td>All</td>
<td>Additional Software training and informational resources</td>
</tr>
<tr>
<td><strong>Module 1: Overview and Smart Accounts in CSC</strong></td>
<td>Partner/ Distributor/ B2B</td>
<td>Partner overview of Smart Accounts and Smart Licensing and step-by-step guide on how to create and manage Holding Smart Accounts in Cisco Software Central (CSC)</td>
</tr>
<tr>
<td><strong>Module 2: Purchasing and Assigning Smart Accounts in CCW</strong></td>
<td>Partner/ Distributor</td>
<td>Step-by-step guide of how to order Smart Licensing products and assign Smart Accounts to Licenses in CCW for Partners and Distributors</td>
</tr>
<tr>
<td><strong>Module 2: Purchasing and Assigning Smart Accounts for B2B</strong></td>
<td>B2B</td>
<td>Step-by-step guide of how to order Smart Licensing products and assign Smart Accounts to licensing through B2B ordering</td>
</tr>
<tr>
<td><strong>Module 3: License Management with Smart Accounts</strong></td>
<td>Partner/ Distributor/ B2B</td>
<td>Step-by-step guide on how to manage licenses assigned to a Smart Accounts. PAK based licenses are managed in LRP and Smart Licenses are managed in SSM.</td>
</tr>
<tr>
<td><strong>Smart Accounts and Smart Licensing for End Customers</strong></td>
<td>End Customer</td>
<td>A step-by-step guide that will assist your end customers with creating and managing Smart Licenses and PAK licenses with Smart Accounts.</td>
</tr>
<tr>
<td><strong>Request Holding Smart Account Quick Reference Guide</strong></td>
<td>Partner/ Distributor/ B2B</td>
<td>Quick step-by-step guide on how to initiate a request for a Holding Smart Account</td>
</tr>
<tr>
<td><strong>Complete Holding Smart Account Setup Quick Reference Guide</strong></td>
<td>Partner/ Distributor/ B2B</td>
<td>Quick step-by-step guide on how to complete the setup for a Holding Smart Account</td>
</tr>
<tr>
<td><strong>Assist a Customer with Smart Account Set Up QuickReference Guide</strong></td>
<td>Partner/ Distributor/ B2B</td>
<td>Quick step-by-step guide on how a Partner can assist a Customer with setting up a Smart Account</td>
</tr>
<tr>
<td><strong>Assign a Partner to Manage Account on your Behalf QuickReference Guide</strong></td>
<td>Partner/ Distributor/ B2B/ End Customer</td>
<td>Quick step-by-step guide on how a customer can assign a partner to manage their Smart Account</td>
</tr>
<tr>
<td><strong>Your Smart Account is Here!</strong></td>
<td>Partner/ Distributor/ B2B</td>
<td>Email template for distributors and partners to introduce their customer's new Smart Account and provide next steps to complete the setup.</td>
</tr>
</tbody>
</table>
Any Questions
TOMORROW starts here.
Basic Portal Navigation
Login to License Registration Portal (LRP)

1. From Cisco Software Central (CSC), click Traditional Licensing.
Add Smart/Virtual Account During ’Add Token’ Workflow
Assign a Token to a Smart Account or Virtual Account

You will now be able to assign a token to Smart Account or Virtual Account as part of ‘Add token’ process.

1. Click on **Add New PAKs / Tokens** link. A pop-up will appear where you can provide the required details.

2. Select a **Smart Account** and **Virtual Account**, then enter anywhere from one to 10 **PAKs** or **Token IDs**.

3. Click **Submit**.

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Assign your PAK to Smart Account/ Virtual Account

Assign a PAK or Token to a Smart or Virtual Account

If there is a particular **PAK or Token** that does not have an assigned Smart Account or Virtual Account, you will be able to go ahead and assign it.

1. Upon clicking on the **PAKs/Tokens** tab, you will be able to view all PAKs/Tokens associated with that Virtual Account.

2. Choose the **Assign to Smart/Virtual Account** option.
Assign your PAK to Smart Account/ Virtual Account

Assign a PAK or Token to a Smart or Virtual Account

3 A dialogue box will appear and you will have the option to assign your PAK or Token to a Virtual Account.

4 Click Assign to proceed.
Add Smart/Virtual Account During Token Fulfillment
Get new Licenses from a Single PAK/Token

1. Under **Get New Licenses** enter anywhere from 1-10 tokens (separated by commas) and select **Fulfill**.
2. Select the **Smart Account/Virtual Account fields**, select the quantity to Assign
3. Click **Next**, then **Assign to Devices** (serial number needed) review info and **Finish**

This capability is helpful to users as part of the token fulfillment process.
Add Smart/Virtual Account During Token Fulfillment

Associate a Token to a Smart/ Virtual Account from ‘Get New Licenses’

Upon clicking on Get New Licenses, you will be able to associate a token, which is currently unassigned, to any Smart Account or Virtual Account.

You can select either All Quantities to assign all your SKUs to a single license, or you can select Specific Quantities for SKUs.

Enter the number of tokens you wish to assign to the Smart/Virtual Account, and click Next to proceed.

* This capability is helpful as part of the token fulfillment process.
Assign Smart/Virtual Account During Token Consolidation Workflow

Consolidate multiple tokens into one token and assign to Smart/ Virtual Account

1. From the PAKs/Token tab find the Tokens you would like to consolidate, ensure they are from the same product family, and are not fulfilled already.

2. From Actions Dropdown menu, select Consolidate Selected Tokens.

3. Select the Smart Account/Virtual Account fields, review the work is correct.

4. Click Submit.

This capability is helpful during token consolidation, as you can consolidate a variety of tokens into a single token, and assign it to a Virtual Account.
Add Smart/Virtual Account to the Assign/Reassign Workflow in the Licenses Tab

Licenses Tab

1. Log in under your CCO ID (or Smart Account) and from Licenses tab and locate the license.
2. Click on the menu bar and find the Assign to Smart/Virtual Accounts option.
3. Choose the Smart Account/Virtual Account.
4. Confirm details and click Assign. Shortly after you will receive a confirmation message.
Add Smart/Virtual Account to the Assign/Reassign Workflow in the Devices Tab

1. Log in under your CCO ID (or Smart Account) and from Devices tab and locate the device.
2. Click on the menu bar and find the Assign to Smart/Virtual Accounts option.
3. Choose the Smart Account/Virtual Account.
4. Confirm details and click Assign. Shortly after you will receive a confirmation message.
Assign Smart/ Virtual Account during Add Device Workflow

Devices Tab

1. Log in under your CCO ID (or Smart Account) and from Devices tab, click on Add Device.

2. Choose the Smart Account/Virtual Account, Product Family, Device Identifier & Credentials.

3. Confirm details and click OK.

This Add Device capability is helpful in device assignment as it allows you to view all device details.

*Note: Device Identifiers are unique attributes that identify a device within the system. They can be a host ID, serial number, etc.
Date Logic (Start Date and End Date)

1. Calculating **Start Date** Logic
   1. If user did not provide a Start Date at the time of ordering, then Start Date = Ship Date + Offset Date
   2. If user did provide a Start Date at the time of ordering, then the Start Date = Start Date provided by the user
   3. If user provided a Start Date at the time of ordering, and the User Requested Start Date = Ship Date, then the Start Date = Start Date provided by the user.
   4. If user provides a Start Date that is less than "Ship Date + Offset Date", then the Start Date = Ship Date + Offset Date
      - For example: User requests a Start Date of 9/1/15 and the ship date for the PID's Order Line is 8/30/15 and the offset is 2 days, so the system calculated start date would be 9/2/15. If this situation arises, then SSM will use the "Ship Date + Offset Date"
   5. General Rule for Start Date:
      - If Ship Date + Offset > (User Requested) Start Date, then use Ship Date + Offset Date
      - If Ship Date + Offset < Start Date, then use (User Requested) Start Date
      - If Request Date is Null, then Ship Date + Offset Date

2. Calculating **End Date** Logic
   1. If user does not provides the Start Date, License Term End Date = (Ship Date + Offset) + Duration + Grace Period
   2. If user does provide the a Requested Start Date and Requested Start Date > (Ship Date + Offset), License Term End Date = Requested Start Date + Duration + Grace Period
   3. If user does provide the a Requested Start Date and Requested Start Date < (Ship Date + Offset), License Term End Date = (Ship Date + Offset) + Duration + Grace Period
   4. If user provides Requested End Date, License Term End Date = Requested End Date + Grace Period