



Customer Smart Account Organization Examples

Intended Audience: Internal and External Audiences, primarily Customer Smart Account Administrators

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Customer Smart Account Organization

Table of Contents

01

About this Guide

02

Customer Smart and Virtual Account Roles

03

Smart Account Organization Examples

1. Small or Medium Business
2. Global or Regional Enterprise Company
3. Service Provider
4. Regional IT Services Company
5. Cloud Services Company
6. Public Sector: Regional or National Department
7. Public Sector: Military
8. Global Business Process Services Company

About this Guide

Smart Account Administrators

How to Use

- To get the most out of this guide you should first read Customer [Smart Account Best Practices](#).
- When initially setting up your Smart Account, the Smart Account Administrator needs to consider how to organize it based on how their business manages licenses. Additionally, they will need to decide which individuals and their access roles to assign to both the Smart Account and each Virtual Account.
- This guide includes definitions to each of the seven roles available when assigning user access to Customer Smart and Virtual Accounts.
- This guide presents eight different examples of Smart Account organization, tailored by company type, size, and line of business. **These examples are not mandatory to follow exactly; rather, they are intended to help you envision the possibilities so you can adapt them to fit your specific business needs.**

Helpful Resources

- [Smart Account Best Practices](#)
- [Licensing Support](#)

Customer Smart and Virtual Accounts Role-based Access

Role Definitions

Smart Account Roles

Smart Account Administrator: This role is for users who need full control over the Smart Account, including managing users, licenses, and Virtual Accounts. They can edit account properties, add or edit users, and manage licenses for the entire Smart Account. They can also accept agreements and view event logs.

Smart Account User: This role is for users who need access to manage licenses but do not require administrative privileges. They can view and manage licenses but cannot edit account properties or manage users.

Smart Account Viewer: This role is for users who only need to view the account details and licenses without making any changes.

Smart Account Approver: This role is for users who can review notices and approve agreements but cannot manage licenses or users. This role is less commonly used.

Virtual Account Roles

Virtual Account Administrator: This role is for users who need to manage all aspects of a specific Virtual Account, including adding or editing users, managing licenses, and creating subfolders within the Virtual Account.

Virtual Account User: This role is for users who need to manage assets (licenses and devices) within a specific Virtual Account but cannot add or delete Virtual Accounts or manage user access.

Virtual Account Viewer: This role is for users who only need view-only access to a specific Virtual Account.

Small or Medium Business

Operating in one country or state, with local presence

Company Information/Structure: 1 office location

Number of Smart Accounts: 1 Customer Smart Account

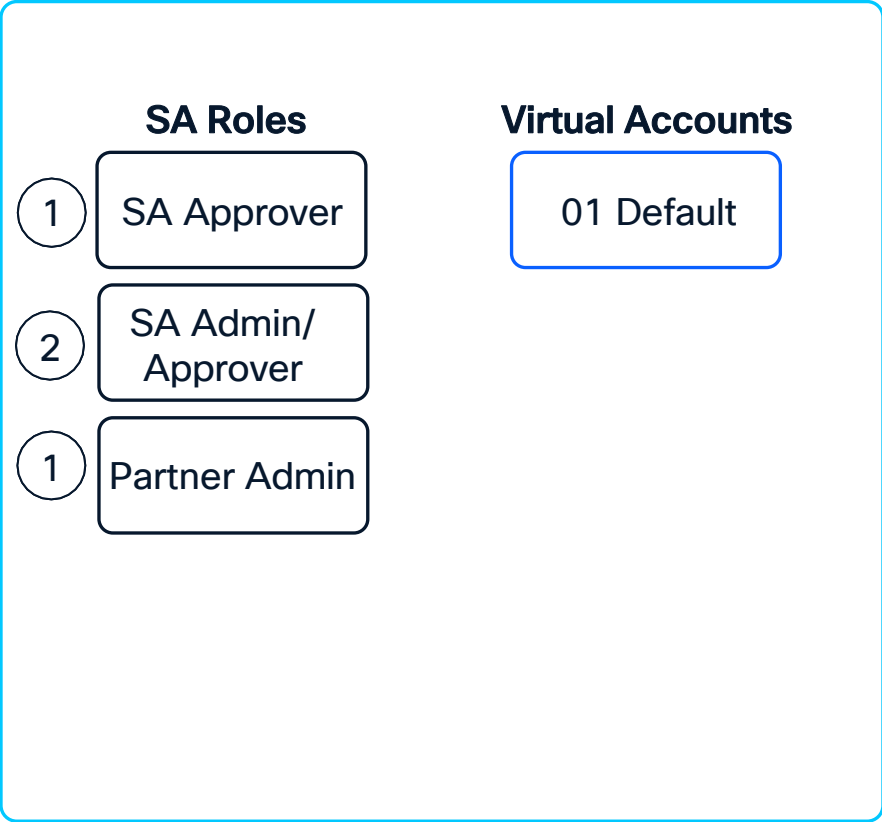
Number of Virtual Accounts: 1 Virtual Account (default)

Structure of Virtual Accounts: n/a

Number of Users/Admins:

- 1 Smart Account Approver
- 2 Smart Account Administrators and Approvers
- 1 delegate Smart Account access to 1 Partner Admin of choice

Smart Account (SA)



Global or Regional Enterprise Company

2

Typical enterprise operating at a global or regional level

Company Information/Structure: 20+ locations (offices, production sites or logistic/distribution sites). Global presence (e.g., Americas, Europe, Asia), or regional presence (e.g., Europe or US).

Number of Smart Accounts: 1 Customer Smart Account

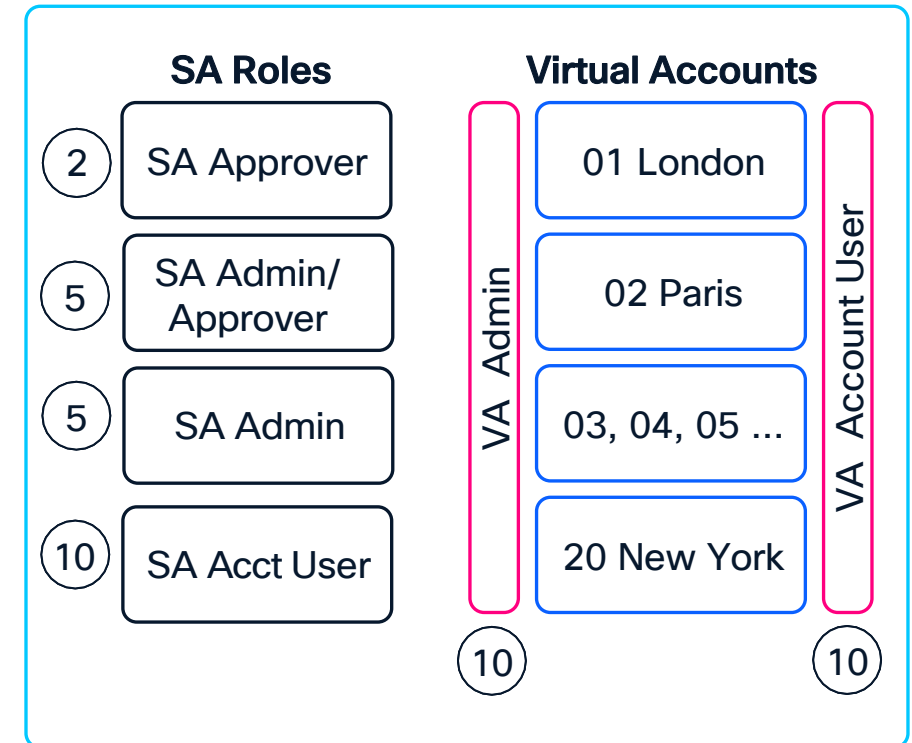
Number of Virtual Accounts: 20-60 Virtual Accounts

Structure of Virtual Accounts: by location (city and country)

Number of Users/Admins:

- 1-2 Smart Account Approvers
- 2-5 Smart Account Admins and Approvers
- 2-5 Smart Admins
- 5-10 Account Users
- 5-10 Virtual Account Admins
- 5-10 Virtual Account Users

Smart Account (SA)



Service Provider

Global or regional level, providing internet, phone, and TV services and operating as a reseller

3

Company Information/Structure: Offices in multiple locations

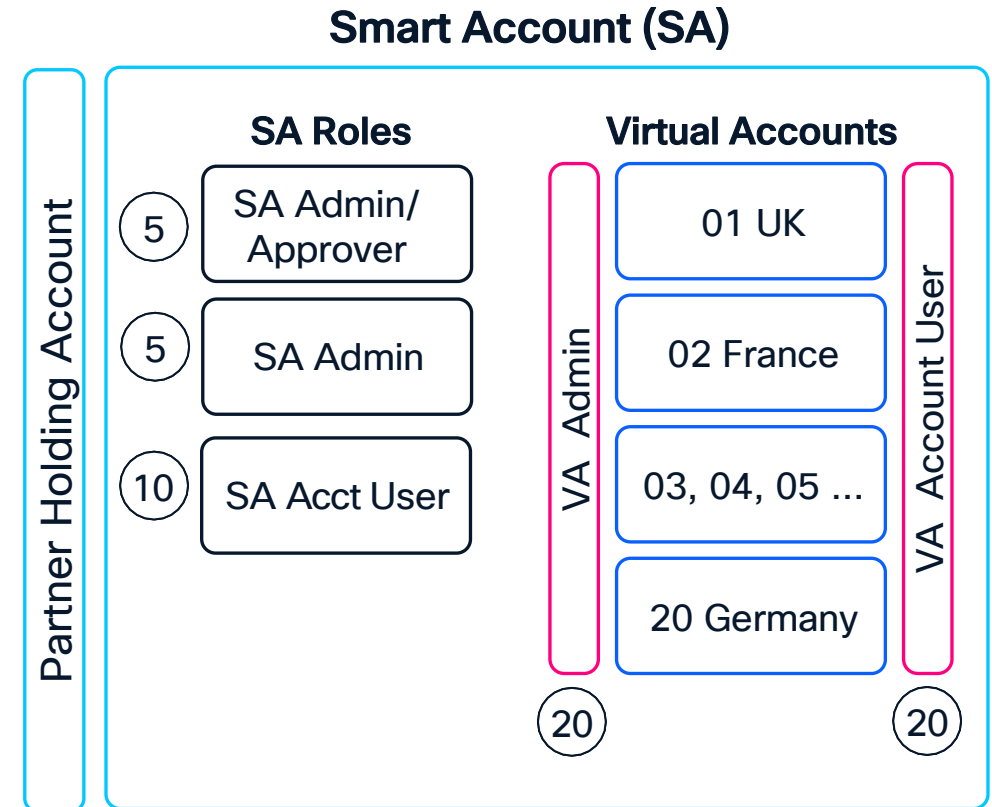
Number of Smart Accounts: 1 Customer Smart Account, 1 Partner Holding Account (if operating as a reseller)

Number of Virtual Accounts: 20-100 Virtual Accounts

Structure of Virtual Accounts: by country, city, metropolitan area, department, business line, or another organizational unit

Number of Users/Admins:

- 2-5 Smart Account Admins and Approvers
- 2-5 Smart Admins
- 2-10 Account Users
- 10-20 Virtual Account Admins
- 10-20 Virtual Account Users



Regional IT Services Company

Reseller, organizing by customer

4

Company Information/Structure: 1-5 offices in a specific region (e.g., North America or Europe)

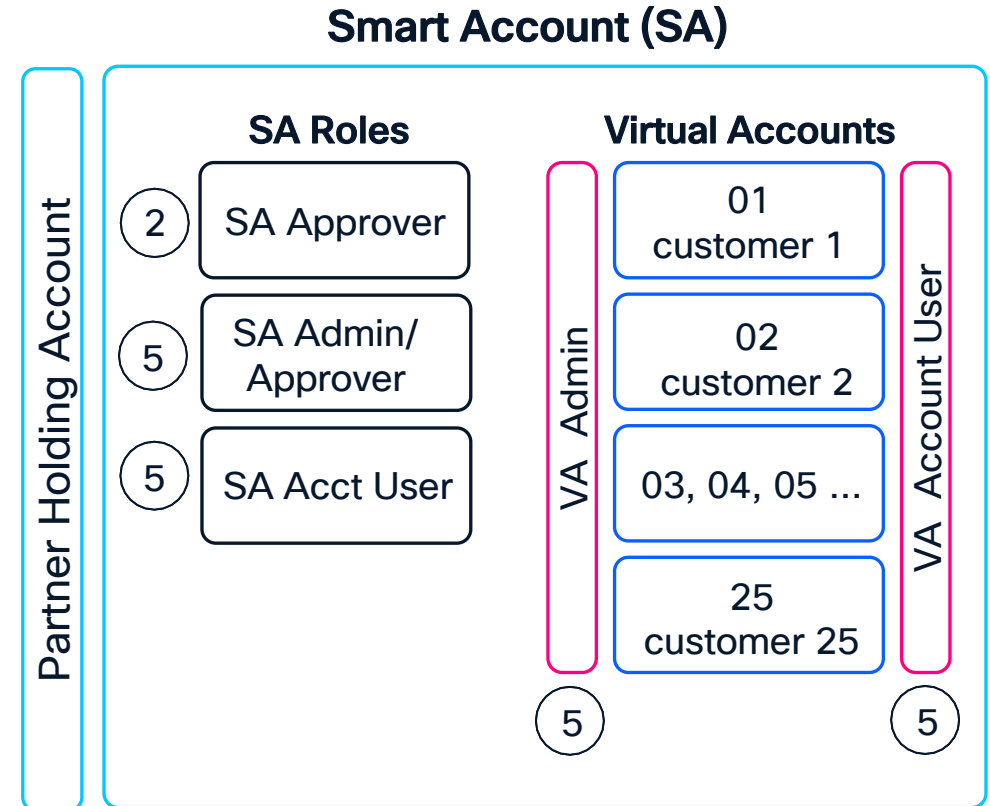
Number of Smart Accounts: 1 Customer Smart Account, 1 Partner Holding Account (for operating as a reseller)

Number of Virtual Accounts: 20-25 Virtual Accounts

Structure of Virtual Accounts: by end customer company or by location (city, metropolitan area)

Number of Users/Admins:

- 1-2 Smart Account Approvers
- 2-5 Smart Account Admins and Approvers
- 2-5 Smart Account Users
- 2-5 Virtual Account Admins
- 2-5 Virtual Account Users



Cloud Services Company

Global or regional presence, operating as a reseller

5

Company Information/Structure: 5+ global or regional locations

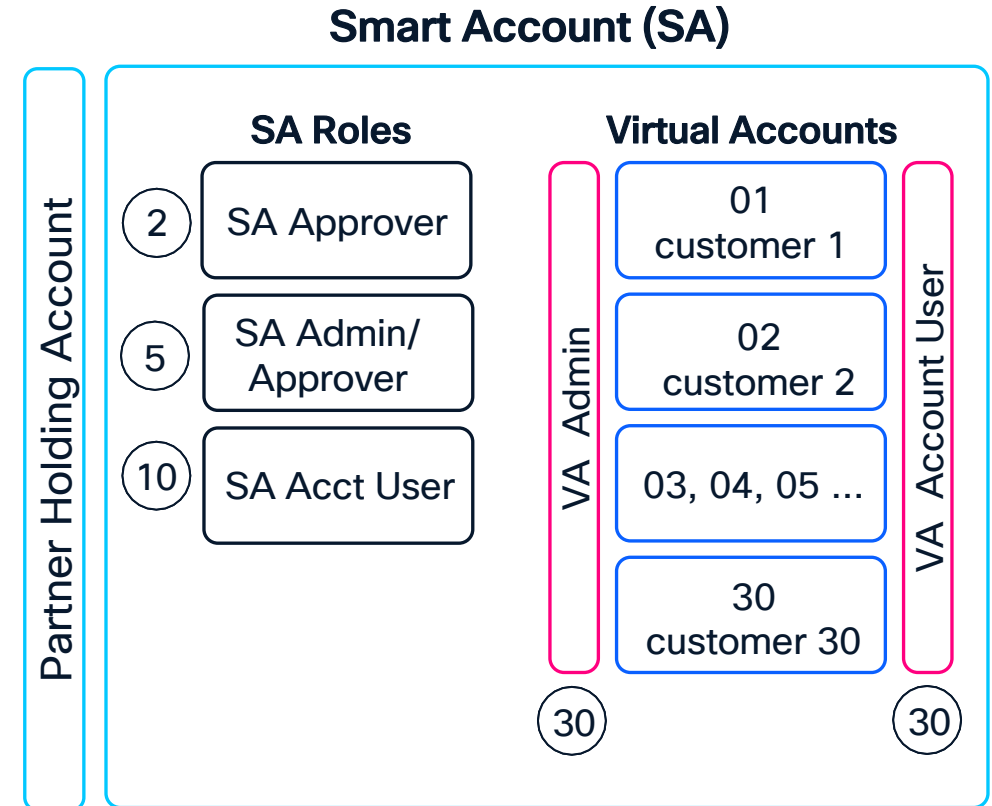
Number of Smart Accounts: 1 Customer Smart Account, 1 Partner Holding Account (for operating as a reseller)

Number of Virtual Accounts: 40-80 Virtual Accounts

Structure of Virtual Accounts: by end customer company

Number of Users/Admins:

- 2 Smart Account Approvers
- 2-5 Smart Account Admins and Approvers
- 2-10 Smart Account Admins
- 20-30 Virtual Account Admins
- 20-30 Virtual Account Users



Public Sector: Regional or National Department

6

Company Information/Structure: Global or region
Department

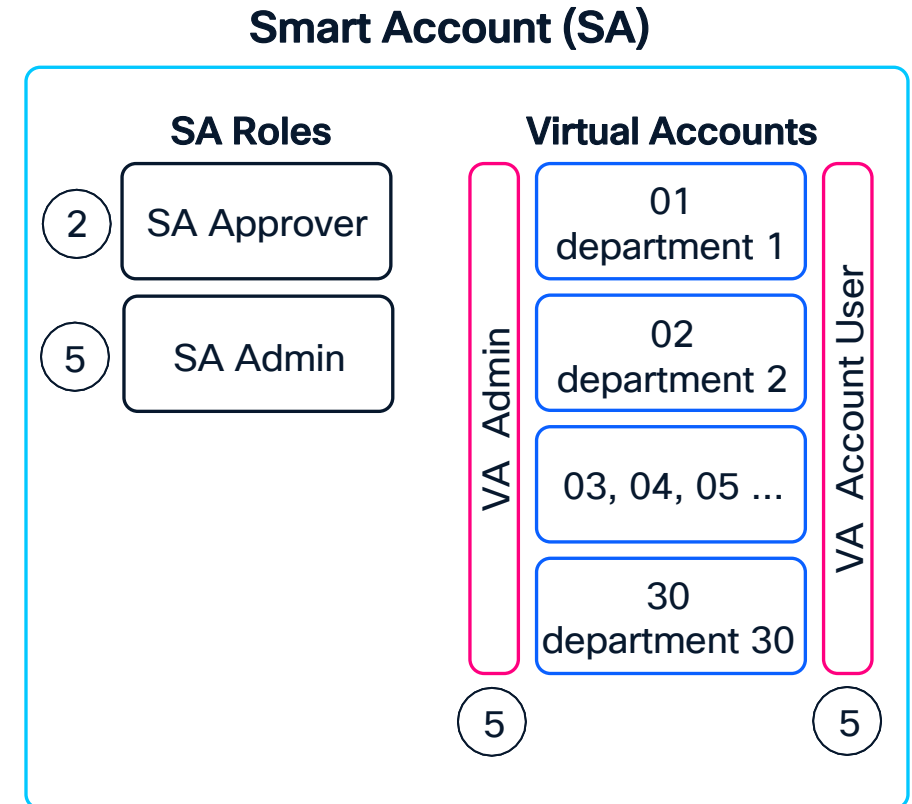
Number of Smart Accounts: 1 Customer Smart Account

Number of Virtual Accounts: 20-30 Virtual Accounts

Structure of Virtual Accounts: by department (e.g.,
Commerce, Environment, Education, Transportation, etc.)

Number of Users/Admins:

- 2 Smart Account Approvers
- 5 Smart Account Admins
- 2-5 Virtual Account Admins
- 2-5 Virtual Account Users



Public Sector: Military

7

Company Information/Structure: Military

Number of Smart Accounts: 1 Customer Smart Account

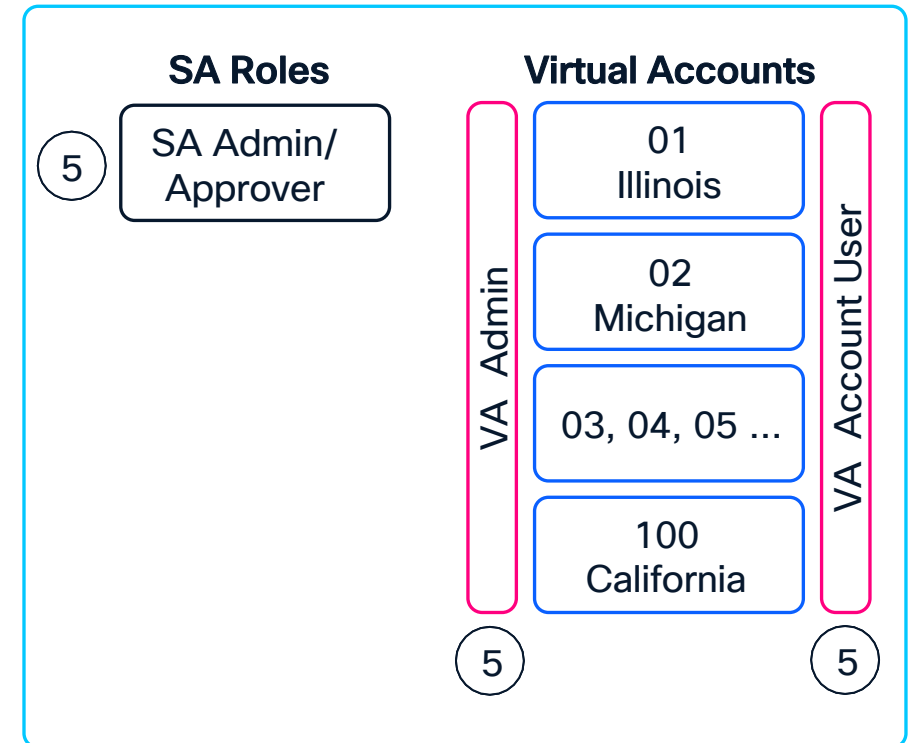
Number of Virtual Accounts: 50-100 Virtual Accounts

Structure of Virtual Accounts: by location

Number of Users/Admins:

- 2-5 Smart Account Admins and Approvers
- 2-5 Virtual Account Admins
- 2-5 Virtual Account Users

Smart Account (SA)



Global Business Process Services Company

8

Company Information/Structure: Global leader for business process outsourcing services, 10+ locations and delivery centers

Number of Smart Accounts: 1 Customer Smart Account

Number of Virtual Accounts: 10-50 Virtual Accounts

Structure of Virtual Accounts: by city

Number of Users/Admins:

- 2 Smart Account Approvers
- 2-5 Smart Account Admins and Approvers
- 5-10 Virtual Account Admins
- 5-10 Virtual Account Users

Smart Account (SA)

