How can I re-assign the order from one Smart Account to another Smart Account?

Video

The purpose of this content is to share information for educational and/or informational use. You may choose to watch the video or read the content below-both provide the same material, so feel free to engage with whichever format you prefer.

Prerequisites

Before You Start Ensure You Have the Following:

- Active Cisco.com account.
- Valid Business Justification to transfer Licenses and Devices.
- User access in Source SA and Destination SA



Caution:

- Smart Account Assignment and Reassignment are always applied to the entire order line.
- At present, this self-serve capability does not account for the transfer of Software Contracts.



Note:

- Please DO NOT perform these actions yourself if you are an internal Cisco resource outside of the Licensing Support team.
- Need help finding your Cisco licenses or order provisioning status? Our 'Find My License' feature in Ask Licensing helps locate licenses across platforms (SSM, LRP, EAWS, etc) and track real-time order status from placement to completion. Visi*t* Ask Licensing for more information.
- With the current capability assets associated to an Enterprise Agreement buying model and devices connected to an OnPrem deployment model cannot be transferred. These transactions will be disabled from selection.

Steps

Step 1: Go to Asset Transfer Manager and log in with your Cisco.com credentials.



Note: You can search transactions using options like Smart Account, ID, Status, Date Range, or Initiator. There is the added ability to export transferred assets for easier management.

Step 2: Click on Request Asset Transfer.

Step 3: Select a Source Smart Account by searching its Name or Domain in search bar and Click Next.



Note:

- In Asset Summary Column, when you click on Show Counts Button for the selected Smart Account, the Asset summary will display to the right side of the page.
- Select an Administrator from the account to approve the transaction (Only applicable If you are not an Account Administrator).

Step 4: Select Destination Smart Account and Virtual Account and Click Next

Step 5: On the next page Asset Transfer Questions will be displayed.

Is this transfer being initiated to correct a previous Smart Account assignment error?

By selecting:

1. **Yes:**You are correcting a previous assignment error.
2. **No**:Next Question appears --> Are you requesting to transfer license and associated hardware within the same legal entity/company?

By selecting:

Yes: The assets are being moved to Same legal entity.

No: The assets are being moved to the different legal entity

Select No, click on checkbox and select Transferee.



Note:

- The Select Transferee option applies only when the assets are being moved to different legal entity.
- Legal and BP will “Approve” every transfer request.

Step 6: Click Next and Select the assets for transfer.



Note: Device-only transfers will proceed without legal intervention.

Step 7: Click Next and fill in the mandatory details and accept terms & conditions in Asset Transfer Request Form page.



Note: Asset Transfer can proceed as soon as C2A submission is confirmed — no need to wait for Legal and BP approval.

Step 8: Click on Submit for Review.



Note:

- Following a successful submission, a unique “Transaction ID” is generated for the transfer.
- When Transaction status is “Pending Submission”, under the "Actions" column, click on the "Action" button for your respective Transaction ID, and follow the instructions to submit the transaction.
- Once the transaction is submitted, the Transferor will be email notified about the transaction status.

Refer Transfer Status section below.

Validation Initiated: The process begins with an initial validation check to ensure the assets are eligible to be transferred.

Validation Completed: The asset's eligibility for transfer has been successfully verified.

Pending Submission: Validation for the asset transfer has been completed and is ready for submission.

Submitted: The request for asset transfer has been formally submitted.

Submitted – Awaiting Transferee consent: The transaction will only progress upon obtaining consent from the Transferee.

Compliance Screening: The transaction is under review to ensure it adheres to regulatory standards.

Compliance Screening Rejected: The transaction has been cancelled by the Cisco Legal Team.

An email will be sent to you from swtransfer@cisco.com, providing details and reasons for the cancellation.

Transfer Initiated: The actual transfer process has been initiated, moving the asset between Smart Accounts.

Transfer Completed: The asset has been successfully transferred to the new account.

Transfer Completed with Failure: Some of the assets were effectively transferred while others experienced transfer failures.

Cancelled: The transfer request was cancelled, and the asset remains with its original owner.

(Action only available during Status: Validation Completed)

Troubleshooting

If you experience an issue with this process, that you cannot address, please open a Licensing case at Support Case Manager (SCM) using Software Licensing option.

For feedback on the content of this document, please submit here .

For External Customer / Partner Use Only: These instructions are provided to help customers / partners perform the action themselves to resolve the issue. If the customer / partner runs into issues in the instructions, please have them open a case with licensing support (https://www.cisco.com/go/scm) to help resolve.