How can I transfer or move Assets (Device, License) between Smart Accounts?

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, the self-serv 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.
- 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.
- 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. Visit Ask Licensing for more information.

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 the mandatory details and accept terms & conditions in Asset Transfer Request Form page.

- 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 asset 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 case at Support Case Manager

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(with Admin access to Customer Smart Account) perform the following action themselves to resolve the issue. If the customer / partner runs into issues following the instructions, please have them open a case with licensing support (https://www.cisco.com/go/scm) to help resolve.