The Software Administrator's Guide to Autodesk Subscriptions

How to Set Up, Install, and Manage Your Software and Users

Let's get started.

AUTODESK.

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WELCOME

This eBook is your quick start guide to getting up and running with your subscription. It includes an overview of the setup process, helpful tips and detailed step-by-step instructions when and where you may need them.

Is this eBook for you?

This eBook is for **Contract Managers** and **Software Coordinators** who **have subscribed to Autodesk products and services** and are looking for an easy and efficient way to **get their teams set up and working productively** with their software.

How do I navigate this eBook?

There are several ways to easily navigate this eBook:

- Click on the topic you want to explore from the detailed navigation bar on the left side of each page.
- Use the PDF scroll bar.
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Visual Cues

Look for the following visual cues throughout this eBook:

IMPORTANT

Calls out key points to support each step

BEST PRACTICES

Signifies Admin notes and tips

TIME ALERT

Suggests where a step might take additional time

MORE INFORMATION

Helpful links to Autodesk Knowledge Network (AKN) resources

TAKE A CLOSER LOOK

Indicates interactive areas where roll-overs reveal highlights

Links to areas WITHIN this eBook **will appear like this**.

Links to information in places OUTSIDE of this eBook **will appear like this**.

Quick Links

The following quick links take you to key setup procedures, how-to sections and helpful tips in this guide.

- **Top 5 Things You Should Know about Subscription Setup**
- **Setup Process Overview**
- **Understanding the Contract Manager Role**
- **Setting Up Users**
- **Setting Up Named Callers**
- **Best Practices**

For a comprehensive list of topics covered in this guide, see the **Table of Contents**.

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Setup Process Overview

This guide walks you through the 10 steps of setup and installation, from the time your subscription order is processed to successful software launch. For best results, review the **Before You Start** section, then complete the steps in the order listed in the Setup and Installation section.

1. **Order Processed Email (Email #1)**
2. **Get Started Email (Email #2)**
3. **Sign in to Autodesk Account**
4. **Review your Subscription Products & Services**
5. **Set Up/Update Your Profile**
6. **Set Up a Software Coordinator (if needed)**
7. **Set Up Users**
8. **Give Users Access to Products & Services**
9. **Download & Install**
10. **Launch Software**

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Top 5 Things You Should Know About Subscription Setup

1. There are four subscription roles.

Four roles can be assigned to each subscription contract: **Contract Manager, Software Coordinator, User (or Named User),** and **Named Caller** (for Advanced Support only).

Each subscription contract can have one **Contract Manager** and one **Software Coordinator** per serial number or group of products, and as many **Users** and **Named Callers** (if Advanced Support is purchased) as your license supports. If you have multiple products on your contract, you can have multiple **Software Coordinators**. Learn more about roles

2. Subscription setup begins with the Contract Manager.

If you subscribed under your name and/or credit card or using your User ID, you are the official **Contract Manager**. Learn how to change this in the FAQ section

3. There is a process to naming users.

Users must **first be added** by a Contract Manager or Software Coordinator via Autodesk Account to **then have permissions assigned** to them in order to access and use subscription products and services. This process is called **Naming Users**.

Users must be named **BEFORE** you can assign them access to products and services. Learn how to set up Users

4. There is a process to naming callers.

Callers must also be **NAMED** to use the Advanced Support phone benefit. Learn how to name callers

5. It is important to check system requirements.

One of the **most important steps** in the product installation process is checking the system requirements to make sure a system is optimized **BEFORE** downloading and installing the products. **Completing this step FIRST** will ensure a smoother setup and better ultimate experience for the user. Learn more

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Best Practices for Subscription Setup and Management

✔ Understand the role of the Contract Manager.

The Contract Manager is the **main point of contact and administrator** on an Autodesk subscription contract. This role is automatically assigned to the individual whose User ID was used to subscribe.

In some cases, a Contract Manager can be changed (See how). However, Contract Managers on auto-renewal contracts ***cannot*** be changed. Contracts must lapse and new contracts must be purchased to completely change a Contract Manager.

✔ Be organized.

Have your Contract Manager and Software Coordinator meet with each other and with the team(s) to identify roles and determine who needs access to what products, services and benefits. Gather all user information (names, existing User IDs and associated email addresses) so it is documented and available when you need it for **User Setup** and beyond.

✔ Keep information current.

Contract Managers and Software Coordinators should always be sure their Autodesk Account profile, contact information and email address **are up to date** so they always receive notifications, confirmations and critical product information.

✔ Be known as an Admin.

If you are the Contract Manager or Software Coordinator, **make sure your team of users is aware of your role** so they know who to come to if they need support, have questions or run into challenges.

✔ Establish protocols.

We recommend that Contract Managers and Software Coordinators establish internal protocols and processes around user(s) or role(s) change requests, including removing users that are no longer affiliated with the company. You might also establish product protocols to set standards around download and installation processes, as well as updates, features and fixes to keep user software up to date.

✔ Be proactive with auto-renew.

Renew your subscription contract **BEFORE the expiration date** to avoid losing access to your software and incurring potential late fees. Make sure the associated credit card information is kept up to date.

✔ Validate system requirements before installation.

Be sure to check what an application needs for optimal performance and that the target system can support the install and product experience **BEFORE** you install the product.

✔ Know your Autodesk Account.

Explore the Admin areas now so you can quickly find what you need when you need it. Get to know the key areas that pertain to user roles, user access, support and contract details. The management screens offer many nested details and cross-referenced information. You will find that there are several ways to get to the screens you need. Hover over the **"i" icons** for more information. Take full advantage of the integrated Support for self-help and self-paced learning opportunities through the Autodesk Knowledge Network (AKN).

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BEFORE YOU START: GET READY FOR SETUP

This section describes subscription roles and capabilities, lists the information you need before you set up your software, and explains the importance of the User ID.

With a little up-front planning, you can significantly streamline your setup process.

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Understanding Subscription Roles and Capabilities

Four key roles can be connected to each subscription: **Contract Manager, Software Coordinator, User,** and **Named Caller**. Each role has distinct functions and capabilities.

CONTRACT MANAGER (CM)

SOFTWARE COORDINATOR (SC)

USER (U)
(OR "NAMED USER")

NAMED CALLER (NC)

If you subscribed and registered your software and/or services to your unique User ID, you are automatically the CONTRACT MANAGER (CM). As CM, you are the main point of contact when it comes to your Autodesk Subscription Contract. It is your responsibility to assign access and permissions to Autodesk products and services associated with the contract.

You will receive an initial **Order Processed email** (email #1) and then a **Get Started email** (email #2) as well as other time-sensitive communications from Autodesk, including renewal notices. You can identify and assign Software Coordinators and Users who need access to software and services in Autodesk Account. You can also identify and assign Named Callers (if your support level allows).

Contract Manager is considered the primary Admin role. The CM will also be a Named User (by default) and a Named Caller (by default, if support level allows).

IMPORTANT
IT IS ESSENTIAL THAT CONTRACT MANAGERS USE THE CORRECT EMAIL ADDRESS. The Contract Manager role defaults to the email address used at the point of order entry. Therefore, it is important that orders are placed on the correct email address prior to entry. Contract Managers should use their email address already associated with their User ID for purchases. If you do not have an User ID at the point of purchase or you use an email address not yet associated, a NEW User ID will be created on your behalf.

Contract Managers can NOT be changed on auto-renewal contracts. Contracts must lapse and new subscriptions must be initiated to completely change a Contract Manager. It is very important to correctly identify the Contract Manager up front.

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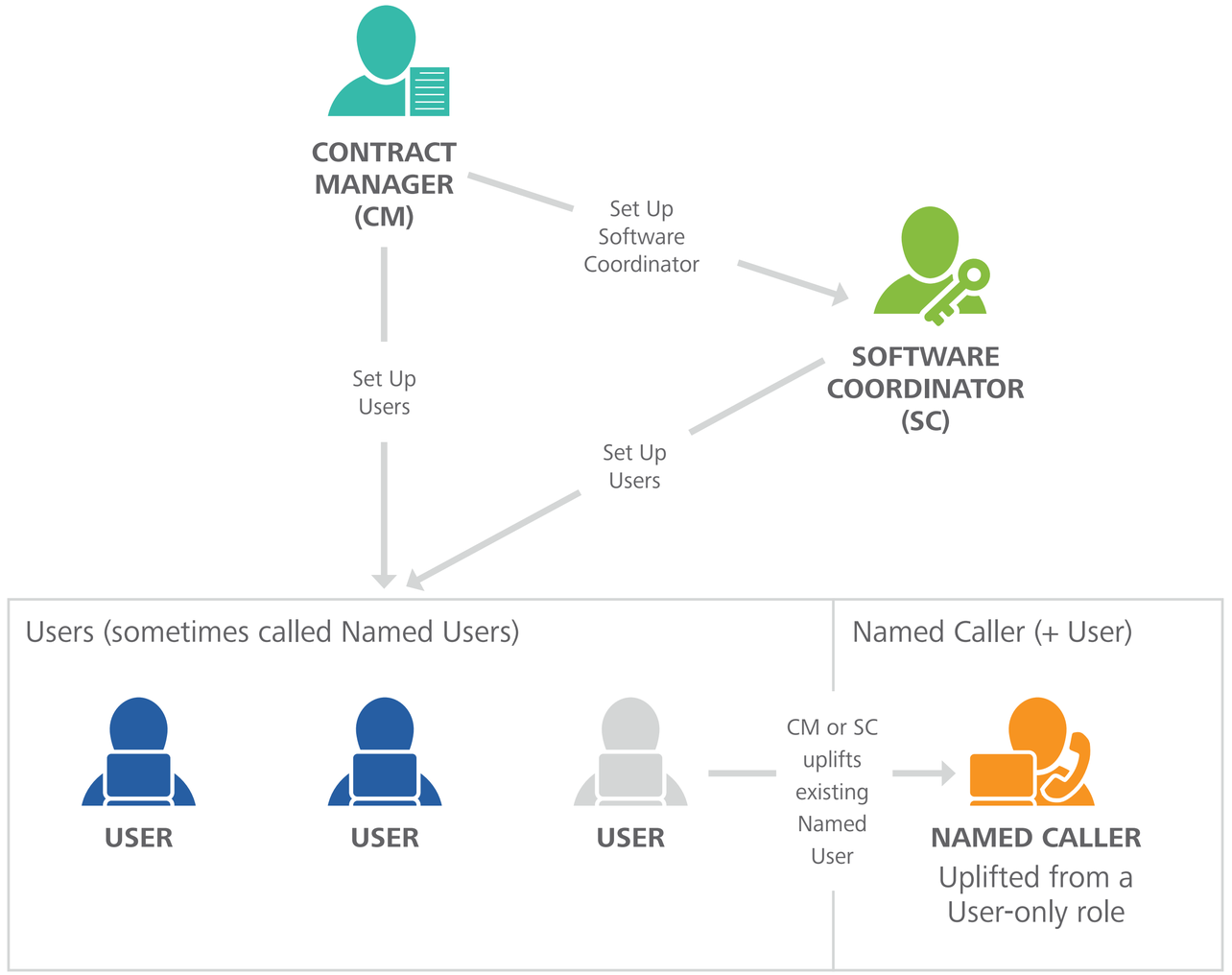
Role Summary

When a new subscription begins, only the Contract Manager role exists. By default, the Contract Manager is also the **User** and a **Named Caller** (if applicable based on the level of support attached to your subscription).

If a Software Coordinator is not assigned by the Contract Manager, the Software Coordinator role capabilities default to the Contract Manager. Only the Contract Manager can assign a Software Coordinator. By default, an assigned Software Coordinator will also be a User and a Named Caller.

If either the Contract Manager or the Software Coordinator do not plan to use any of the products or services assigned by default, such benefits should be removed from them so the benefits may be assigned to other Users. This is done through the User Management section of either Admin's Autodesk Account. Learn more

Both the Contract Manager and the Software Coordinator can set up and manage Users, as well as assign and remove access to products and services.



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Roles and Capabilities Matrix

The following matrix gives you a high-level summary of the origin and capabilities of each of the four key roles.

ROLE ORIGIN *How does each role come to be?*	CONTRACT MANAGER (CM) ADMIN ROLE	SOFTWARE COORDINATOR (SC) ADMIN ROLE	USER (U) ALSO CALLED A "NAMED USER"	NAMED CALLER (NC) MUST FIRST BE NAMED A USER
	Subscriber (purchaser of the subscription)	If not assigned, capabilities default to CM	Added by CM or SC	Default for CM and SC roles, or User elevated by CM or SC
CAPABILITY				
Subscribes to products and services	●			
Main point of contact for your Autodesk subscription contract	●			
Receives Order Processed email (email #1)	●			
Receives Get Started email (email #2)	●	●	●	
Manages contract(s) and renewal terms	●			
Receives renewal notices	●			
Assigns Software Coordinators	●			
Sets Up/Manages Users; assigns User access to products, services and support	●	●		
Receives email notifications to download new releases or upgrades of Autodesk products		●		
Manages personal profile	●	●	●	●
Downloads and installs products	●	●	●*	●*
Accesses serial numbers & product keys	●	●	●**	●**
Downloads product enhancements and updates	●	●	●*	●*
Submits/Views web support cases	●	●	●*	●*
Designates Named Callers***	●	●		
Accesses phone support (with Advanced Support)***	● (NC BY DEFAULT)	● (NC BY DEFAULT)		●

*Users must first be granted privileges by CM or SC before they can download products, product enhancements and upgrades, or access web support.
**Available to Users with products that require it. ***Named Callers are only available with Advanced Support.

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Subscription Role Scenarios

As you have seen in the previous section, there are multiple roles available to help you manage your subscription contracts and user needs. Larger companies may assign roles to more people while roles in smaller teams and individuals may overlap.

IMPORTANT

It is best to identify your team's needs and roles before you set up your subscription.

BEST PRACTICE

Contract Managers and Software Coordinators should meet with their teams PRIOR to subscription setup. This way Admins can identify who needs access to the products, services and benefits. Be sure to collect all necessary user information so it is readily available for user setup, as noted in the next section.

Subscription scenarios to demonstrate how roles might be assigned:

Smith Architecture is a 10-person company. They have 2 purchasing agents, 1 IT Manager and 3 Autodesk users. Smith purchased a subscription with multi-user access to the Autodesk product of their choice and Advanced Support.

- **Contract Manager** = Purchasing Agent/Subscriber
- **Software Coordinator** = IT Manager, to help implement subscription installation and support needs
- **Users** = 3 employees that will access the software and benefits. Each needs to be named (added and set up) before they can launch or access the software, and access the other benefits.
- **Named Callers** = 3 total. Contract Manager/Purchasing Agent (by default), Software Coordinator/ IT Manager (by default) and one of the Users (as defined by IT Manager/Software Coordinator)

Jones Consulting is a one-person company. Jones purchased a subscription with single-user access to the Autodesk product of their choice.

- Alex Jones is the **Contract Manager** and User (by default)
- No **Software Coordinator** is needed in this one-person scenario. The SC role's capabilities default to the CM
- No **Named Caller** is available with Basic Support

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Prepare for Setup Success

As Contract Manager, you can maximize the efficiency of your setup process by identifying your **team roles** and following the preparatory steps below. Carefully review this section to make your setup process go as smoothly as possible.

1. Query Your Users

Before you begin setup, **ask each person** that will be associated with this subscription in any role (even new users) the following critical question:

Do you have an existing Autodesk account?

- **If YES,** collect that user's EXISTING credentials (listed in next section) to ensure that you are connecting to the correct User ID within the setup process. Tell them that they will receive Get Started and Permissions Changed emails with their sign in credentials when their benefits are ready.
- **If NO,** collect that user's information (listed in next section) and enter it into the Add User form (Step 7) when you set them up. This will automatically create a linked User ID for them. Tell them NOT to set up their own account while this process is taking place. They should WAIT to receive their Get Started email with their sign in credentials. The Get Started and Permissions Changed emails will indicate that their benefits are ready.

2. Collect User Information

Next, gather the following information for all users:

- ✔ First name
- ✔ Last name
- ✔ Email address that is **associated** with **OR** that they **want associated** with their User ID
- ✔ User ID if they have an existing Autodesk account (this may be the same as their email)

IMPORTANT

User IDs must be correct for users to be accurately set up and connected to subscription benefits. If you enter user information that does not match an existing User ID record, a new User ID will be created.

If users have multiple User IDs, it is important that you connect to the correct/preferred one as subscription benefits will soon be connected to their ID's profile information.

Learn more about Setting Up New User IDs

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Setting Up New User IDs

The process of Setting Up Users (Step 7) automatically creates a linked User ID for any new users.

New users should NOT go to Autodesk Account and create a potentially additional User ID while the setup process is happening. Duplicate accounts can hinder access and delay their onboarding process.

New users should let the Contract Manager or Software Coordinator create it for them. Remind new users to wait for their Get Started email and use the provided sign in credentials to sign in to the connected account.

BEST PRACTICE
Admins and users should check with each other before setting up any new User IDs. It is best to simply **set up all new User IDs** through the simple integrated process within the Setting Up Users step (Step 7).

User ID vs. Autodesk Account – Definitions

USER ID

Your User ID is your single sign-in that enables you to use the same ID and password to access multiple Autodesk websites. Your User ID is typically your email address, but it can also be an alpha-numerical ID you create.

When you subscribe through the Online Store, we'll help you create an User ID if you don't already have one. This sign in information gives you access to download software and manage your products and services.

AUTODESK ACCOUNT

This is your account portal at **accounts.autodesk.com** where you can manage user access to software and services, subscription contract renewal, and cloud credits.

IMPORTANT
The User ID is *THE* identifier for you and each person on your team. The User ID is also the user's single sign-in credential across all key Autodesk digital properties.

We typically recommend that you make your ID the same as your email address but it can also be an alpha-numerical ID you create.

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SETUP & INSTALLATION

Ready to Set Up and Install your Subscription?

This section divides the setup and installation process into 10 distinct steps, from the time your subscription order is processed to software launch.

Best practices and important notes appear throughout the steps, showing you effective ways to achieve successful setup and installation.

Before you begin, be sure to understand and define your **subscription roles** and **gather what you need** for the proper setup.

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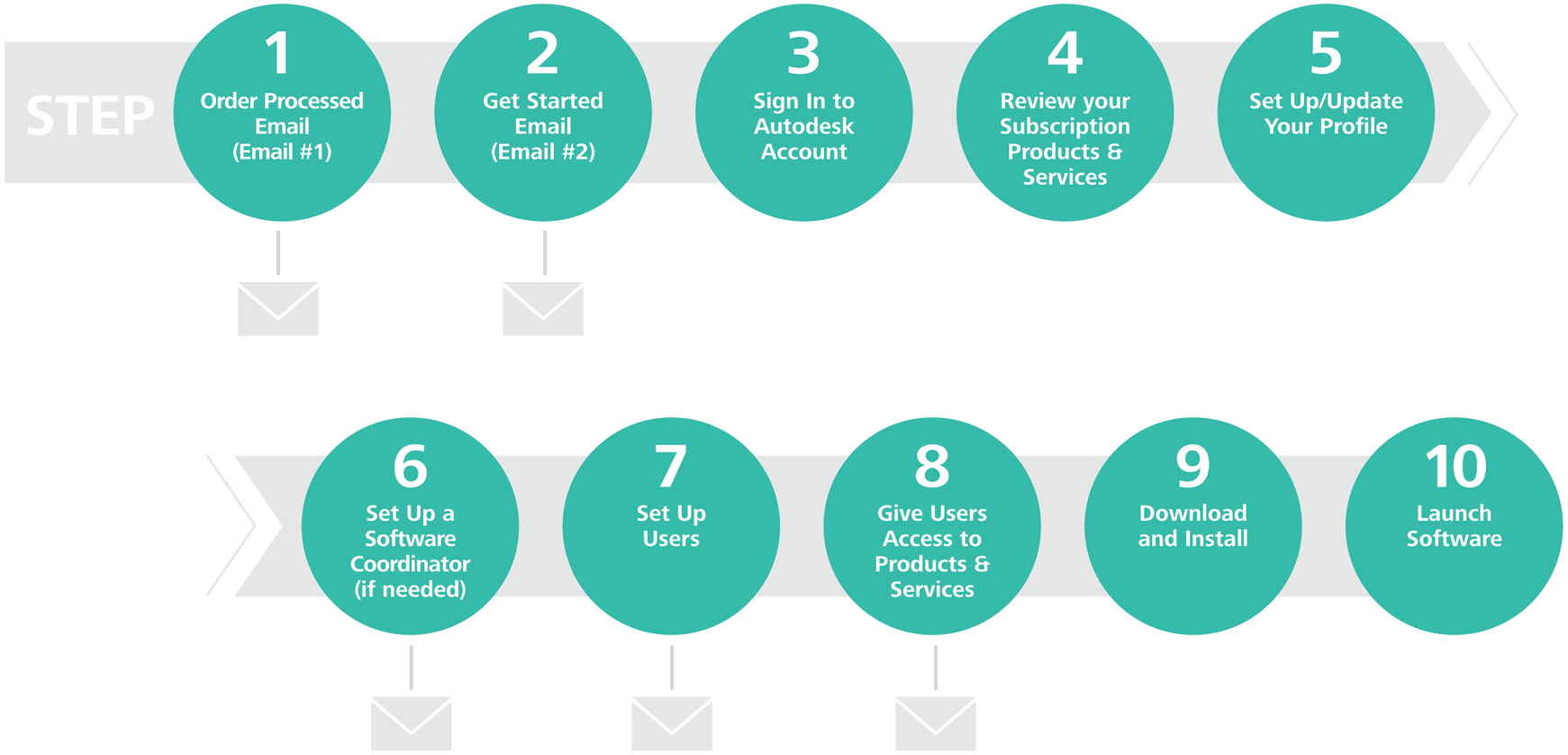
Setup Process

The setup and installation process can be broken down into 10 steps, as shown below. Simply follow the step-by-step directions (and screen references) to complete one step successfully before you move to the next.



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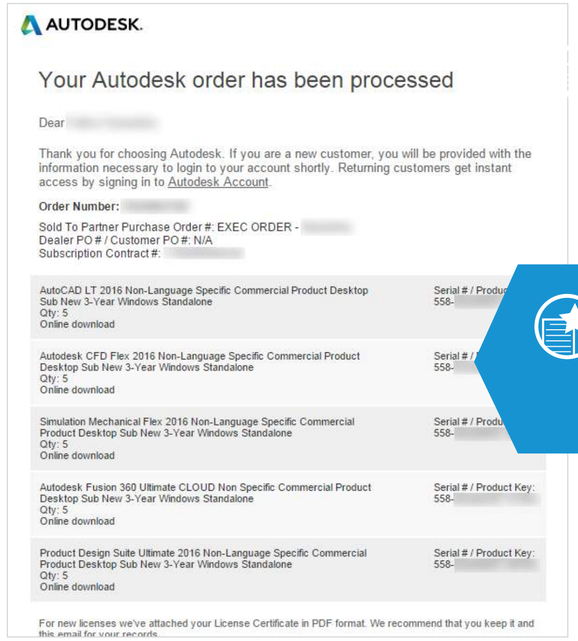
STEP 1

Order Processed Email (EMAIL #1)

Before the Contract Manager can provide access for others to the purchased products and services, a subscription must be ordered and processed. Once the order is processed, Autodesk will send the Contract Manager an email confirmation. Please file the Order Processed email for future reference. This guide assumes that you have already made such a purchase and have received an email receipt.

Who is the Contract Manager?

The person with the User ID or email address used to subscribe will, by default, be set up as the Contract Manager. The Contract Manager will have full administrative access and permissions for the account. Learn more in **Understanding Subscription Roles and Capabilities**



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Your Autodesk order has been processed

Dear

Thank you for choosing Autodesk. If you are a new customer, you will be provided with the information necessary to login to your account shortly. Returning customers get instant access by signing in to Autodesk Account.

Order Number:

Sold To Partner Purchase Order #: EXEC ORDER -
Dealer PO # / Customer PO #: N/A
Subscription Contract #:

AutoCAD LT 2016 Non-Language Specific Commercial Product Desktop Sub New 3-Year Windows Standalone Qty: 5 Online download	Serial # / Produ 558-
Autodesk CFD Flex 2016 Non-Language Specific Commercial Product Desktop Sub New 3-Year Windows Standalone Qty: 5 Online download	Serial # / 558-
Simulation Mechanical Flex 2016 Non-Language Specific Commercial Product Desktop Sub New 3-Year Windows Standalone Qty: 5 Online download	Serial # / Produ 558-
Autodesk Fusion 360 Ultimate CLOUD Non Specific Commercial Product Desktop Sub New 3-Year Windows Standalone Qty: 5 Online download	Serial # / Product Key: 558-
Product Design Suite Ultimate 2016 Non-Language Specific Commercial Product Desktop Sub New 3-Year Windows Standalone Qty: 5 Online download	Serial # / Product Key: 558-

For new licenses we've attached your License Certificate in PDF format. We recommend that you keep it and this email for your records.

IMPORTANT
THIS EMAIL IS ONLY A RECEIPT. YOUR SUBSCRIPTION MAY NOT BE READY.

Email #1 lets you know that your order has been processed. This does NOT mean your subscription is ready.

Upon successfully subscribing (through an authorized Autodesk reseller, the Online Store or Amazon), you (the Contract Manager) should have received an email saying that your order has been processed at the email address provided during the subscribing process. This email may look slightly different depending on origin.

While this email references and has links to Autodesk Account sign in, it DOES NOT mean that your subscription is ready for use. You must wait for the Get Started email (Step 2).

IMPORTANT
For new subscribers – please wait for your sign in credentials before you proceed. Do NOT create a new account.
Your new connected Autodesk Account credentials will be included in your Get Started email (Step 2).

TIME ALERT
For new subscribers, your new Autodesk Account will also be automatically processed as part of your order so you will need to be a bit more patient. You should receive a second email "Get Started" (see Step 2) within 12-24 hours. This email will contain your User ID and temporary password.

For current subscribers, there can be a slight processing delay between your subscription order and when the benefits appear in your Autodesk Account.

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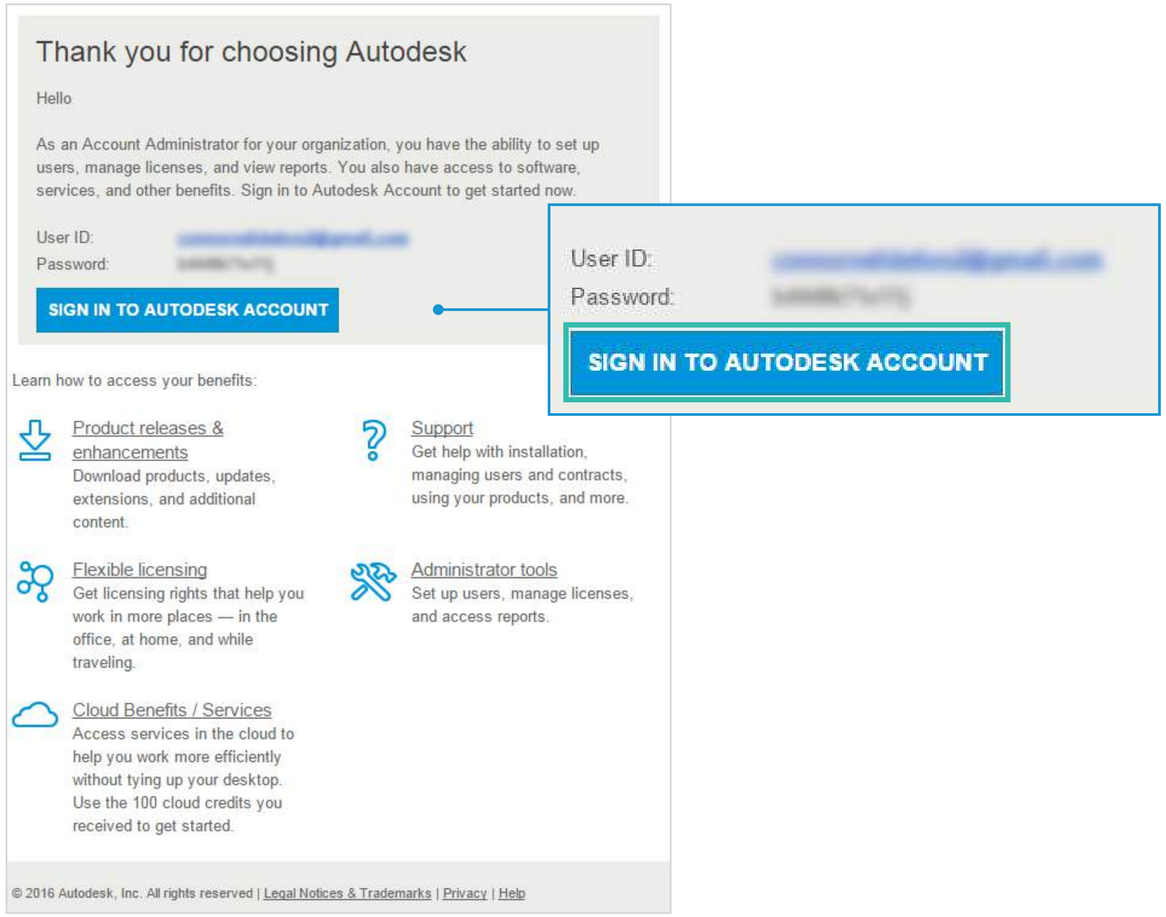
STEP 2

Get Started Email (EMAIL #2)

The second main email that will arrive in your inbox is the Get Started email. This may be called different things, such as Welcome, depending where you subscribed.



The Get Started email signifies that your subscription benefits are ready.

If you were an existing Autodesk User, your message will reference your current User ID and a link to access your account.

If you are a new subscriber, your email will include your new User ID, a temporary password, and a link to access the account.

To access the benefits, sign in to Autodesk Account with the **Access Account button**.

IMPORTANT

If you do not receive the second email within 12-24 hours, contact Autodesk.

If you are an Admin and have successfully signed into Autodesk Account, please sign in and submit a direct support case on the user's behalf through the top navigation Support menu on the top right of your Autodesk Account (Support › View Cases › Submit a Case). **Learn how to submit a support case**

Otherwise, please do the following:

- Go to **Autodesk Knowledge Network**
- Select the "Account Creation & Sign In" icon
- Click the "Signing into an account" button
- Choose to contact us via one of the available options displayed after you sign in (e.g., chat, submit a request, schedule a call, etc.).

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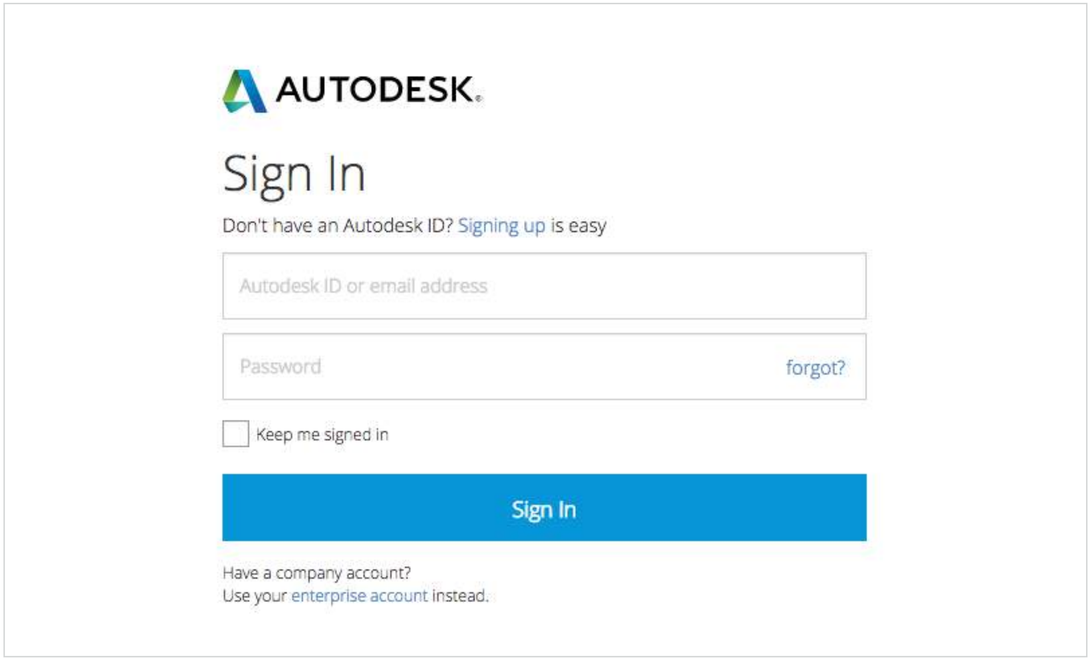
Sign In to Autodesk Account

Access from your Get Started Email

When you sign in to your **Autodesk Account** to view your new products and services, be sure you are doing it at the right time. **If you are a new user, wait until you receive your Get Started email before signing in to Autodesk Account. This will ensure that you are using the User ID associated with the new subscription order. Do not create a new account here.**



BEST PRACTICE

Wait until you receive your Get Started email (Step 2) and then click Access Account from within the email. This will ensure you are using the User ID associated with the new products and services.

UPON SIGN IN:

New users will be asked to change their temporary passwords. All users may be asked to accept **Subscriber Terms and Conditions**.

Once this is done, you will be directed to the **Products & Services** page by default.

More about this step on the next page

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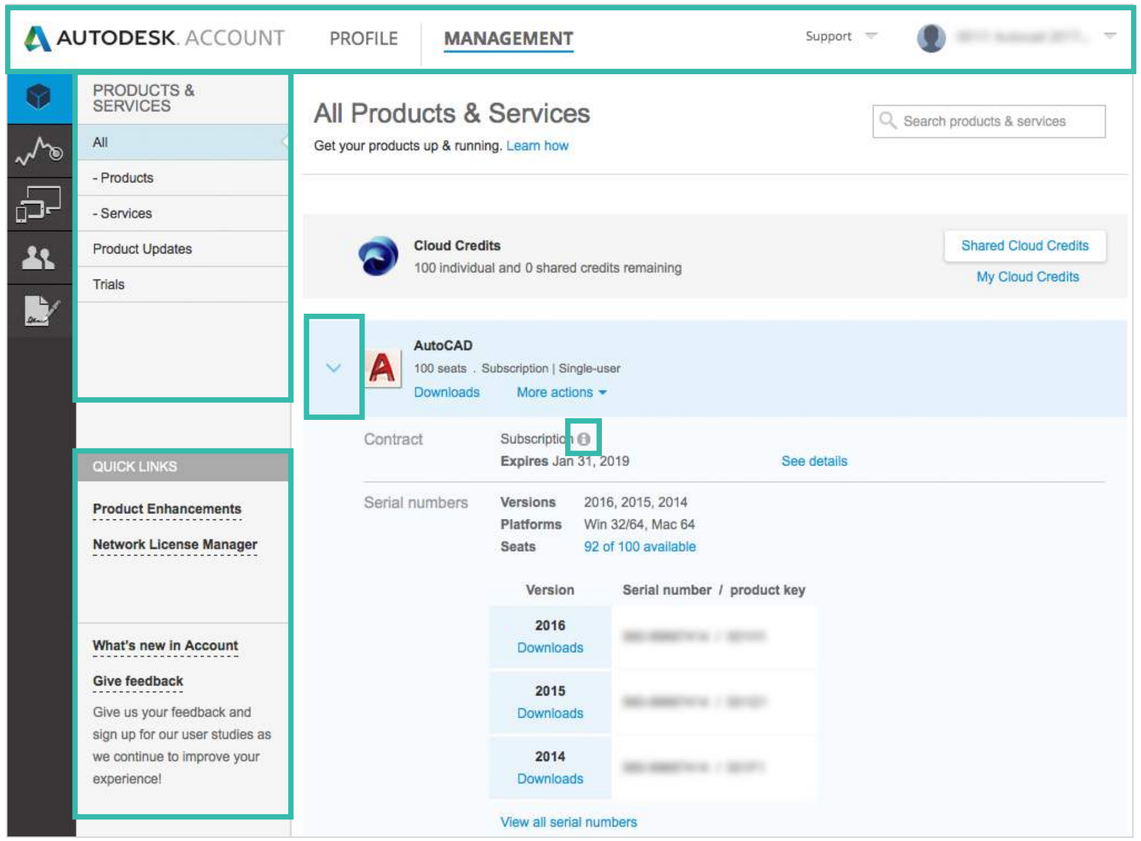
Get to Know the Autodesk Account Interface

Take a moment to orient yourself to the key navigation and elements of the Autodesk Account interface.



KEY AREAS AND ELEMENTS:

TOP NAVIGATION – includes access to your Profile, Management (the default screen when you sign in), and Support

LEFT NAVIGATION (SIDE) – your starting point into main Management menus

QUICK LINKS – gives you access to additional content, depending on what page you are on

DRAWERS – small toggle arrows that will open/ expand to reveal more detailed information about any item

"i" ICON – click the "i" for additional helpful information

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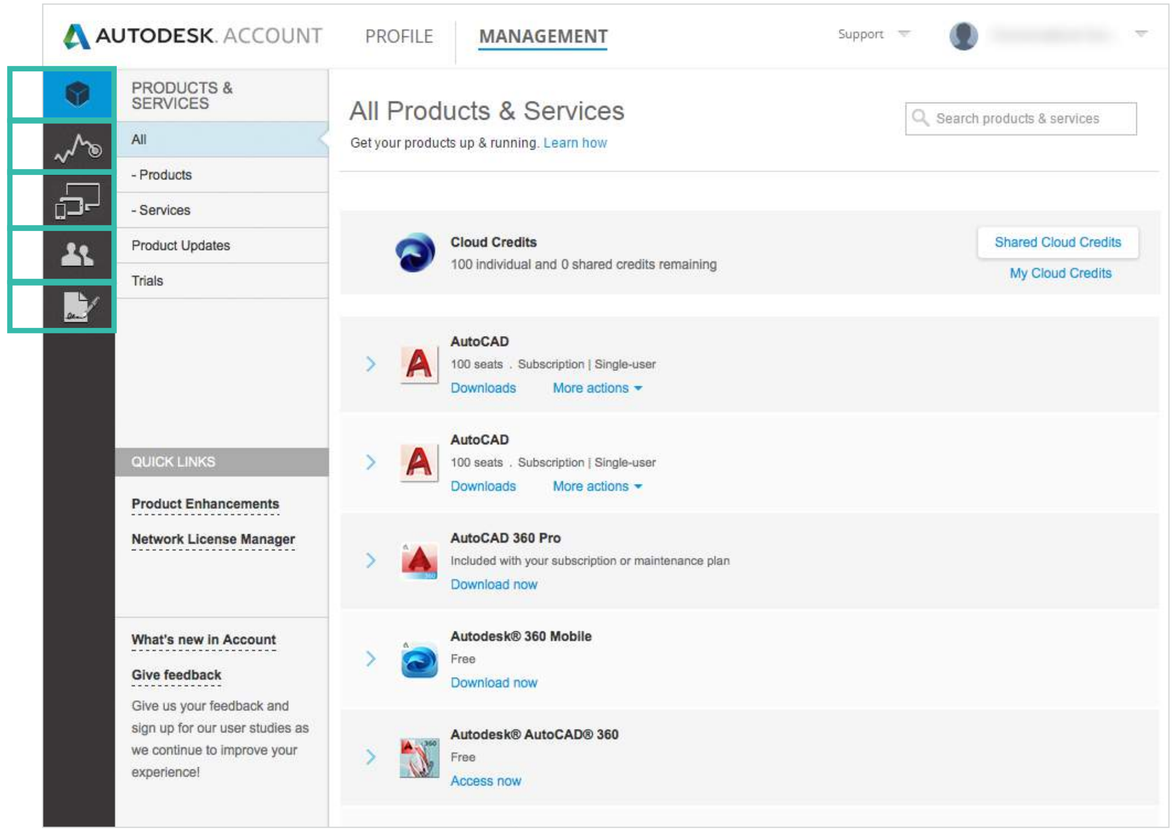

LEFT NAVIGATION

PRODUCTS AND SERVICES – default screen for Management section where you access All Products and Services, Product Updates and Trials

REPORTING – View reports for Cloud Service Usage here

DEVICES – Manage and export connected device information where subscription benefits are loaded

USERS – Add/Manage Users and Manage Phone Support (Quick Links), Filter user information, edit access and export user information as CSV and XLS files here

BILLING & ORDERS – provides a detailed view of your subscription (or maintenance plan) contract including:

- Number and name of products associated with the contract
- Number of seats by product
- Support level
- Subscription term, and start and end dates
- Cloud Credit usage
- Other details

Associated Products & Services can be expanded for additional details or exported as a CSV file.

More about this step on the next page

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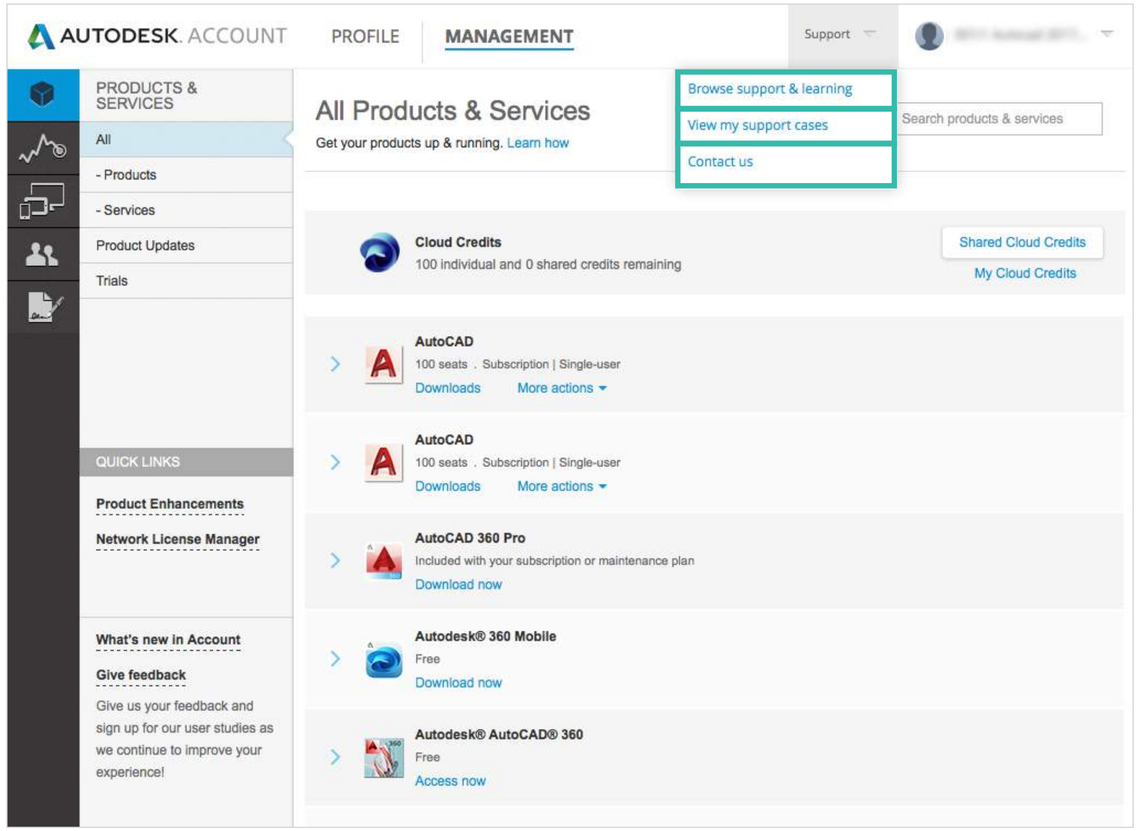

SUPPORT MENU:

BROWSE SUPPORT & LEARNING – this gives you access to self-help articles and information organized by products and cloud services as well as access to forums

VIEW MY SUPPORT CASES – where you **view and submit** your one-to-one web support cases. If you are a Named Caller on an Advanced Support plan, this is also where you can find your support call-in number. See more in the **Support Section**

CONTACT US – this launches a support page featuring top support solutions, curated weekly, enabling you to quickly resolve your issues. You can access one-to-one support options here. This area is constantly evolving and will continue to deliver more features

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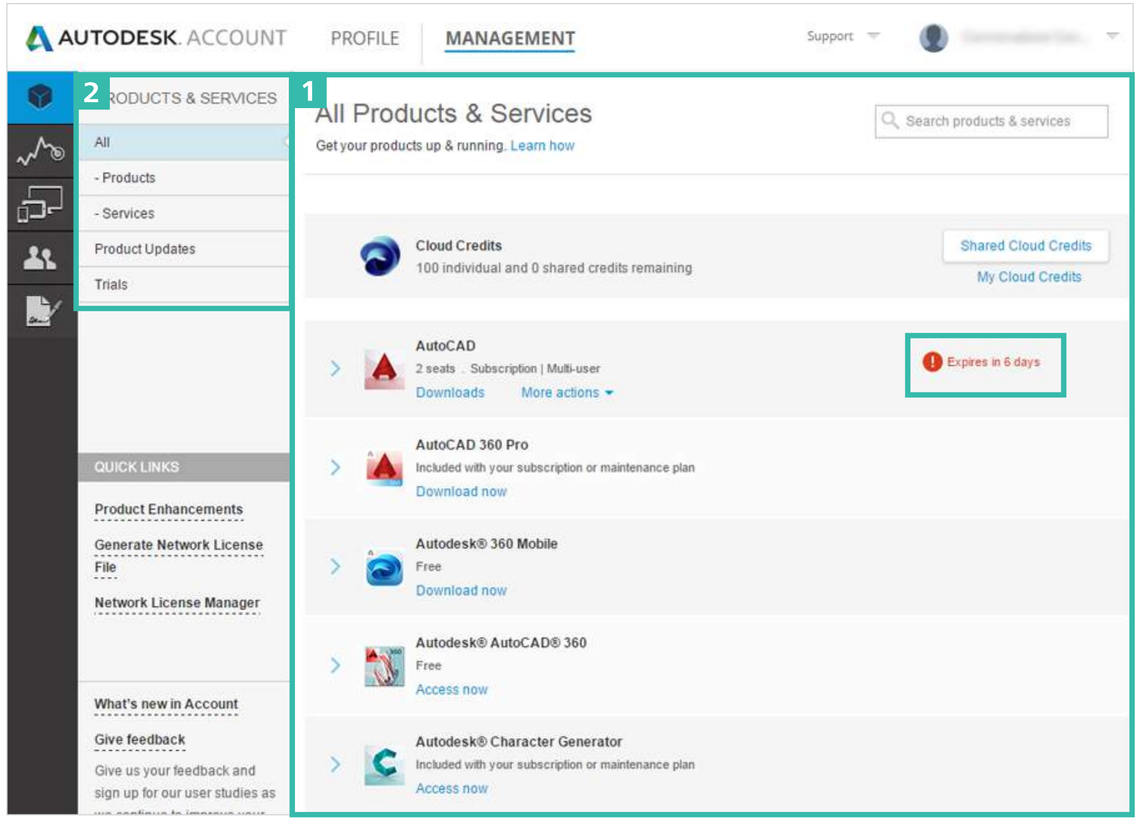
Review Your Subscription Products & Services

Upon sign in, you will land in the Products & Services page. Here you will see the overview of all Products & Services connected to your Autodesk Account.



1. **Take a look at your products & services** to confirm that they are what you expect them to be. You will see the product you've purchased, number of seats, cloud credits that come with your subscription, renewal terms and any cloud credits and entitled web services that are part of your subscription (e.g. 360 mobile, AutoCAD 360, Remote, Photo to 3D, etc.).

   If you see **"Expires"** it simply means this product will expire but not necessarily soon. Open the drawer for each product or service to see more details.

   NOTE: Action buttons will be visible to all Contract Managers, Software Coordinators and Users that have been assigned permissions. If an Admin has not given a user permission to download a product, it won't even appear on the main landing page.

2. **Filter the list down** to just products or services by clicking in the left inset navigation.

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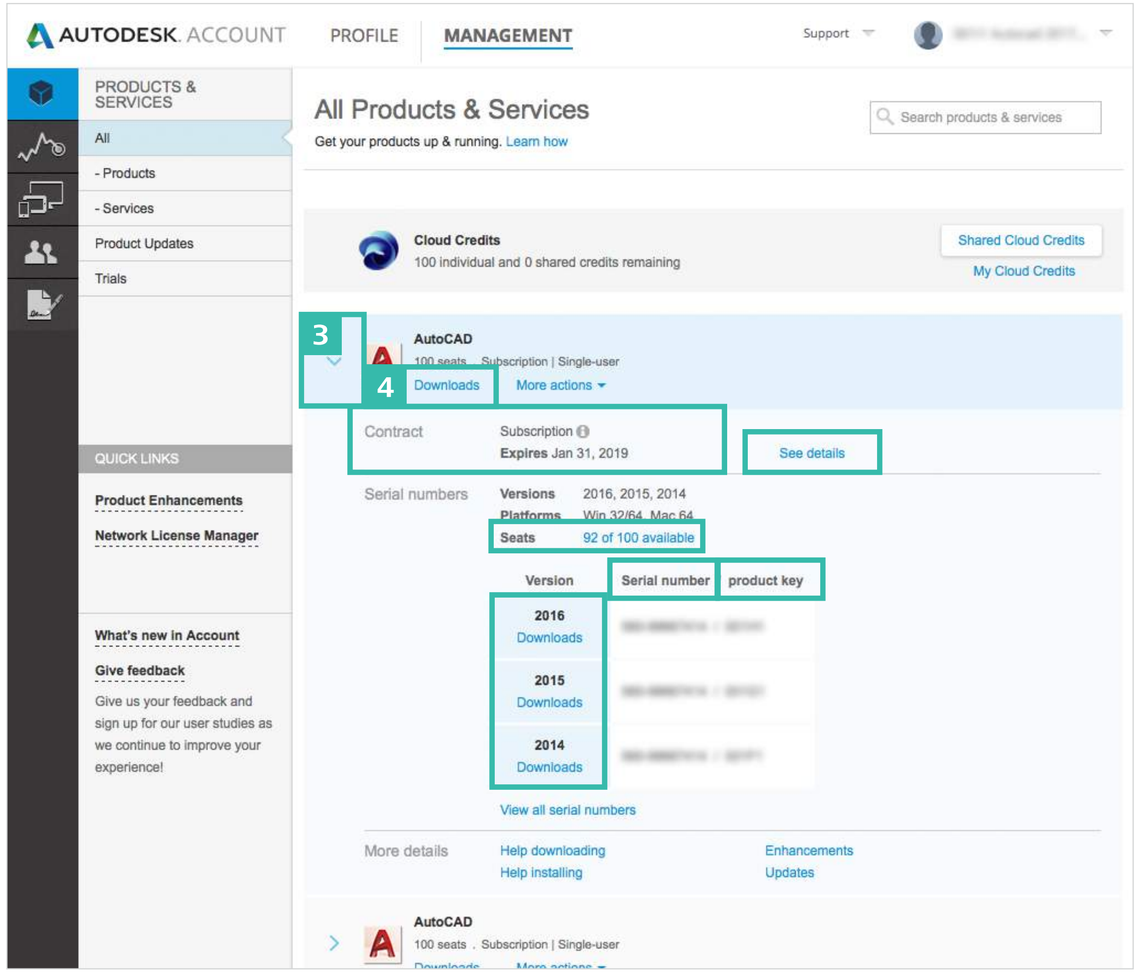

3. **Expand the drawer** (arrow toggle) for each product name or service to get more details and information including:

   a. Contract information

   b. Serial numbers

   c. Product keys

   d. Number of seats available

   e. All contract details as well as cloud credit usage

NOTE: Non-Admin users will see only a portion of this information in their drawers.

4. **Products can also be downloaded/installed from this page.** It is recommended that you do this step **AFTER** User Setup (Step 7).

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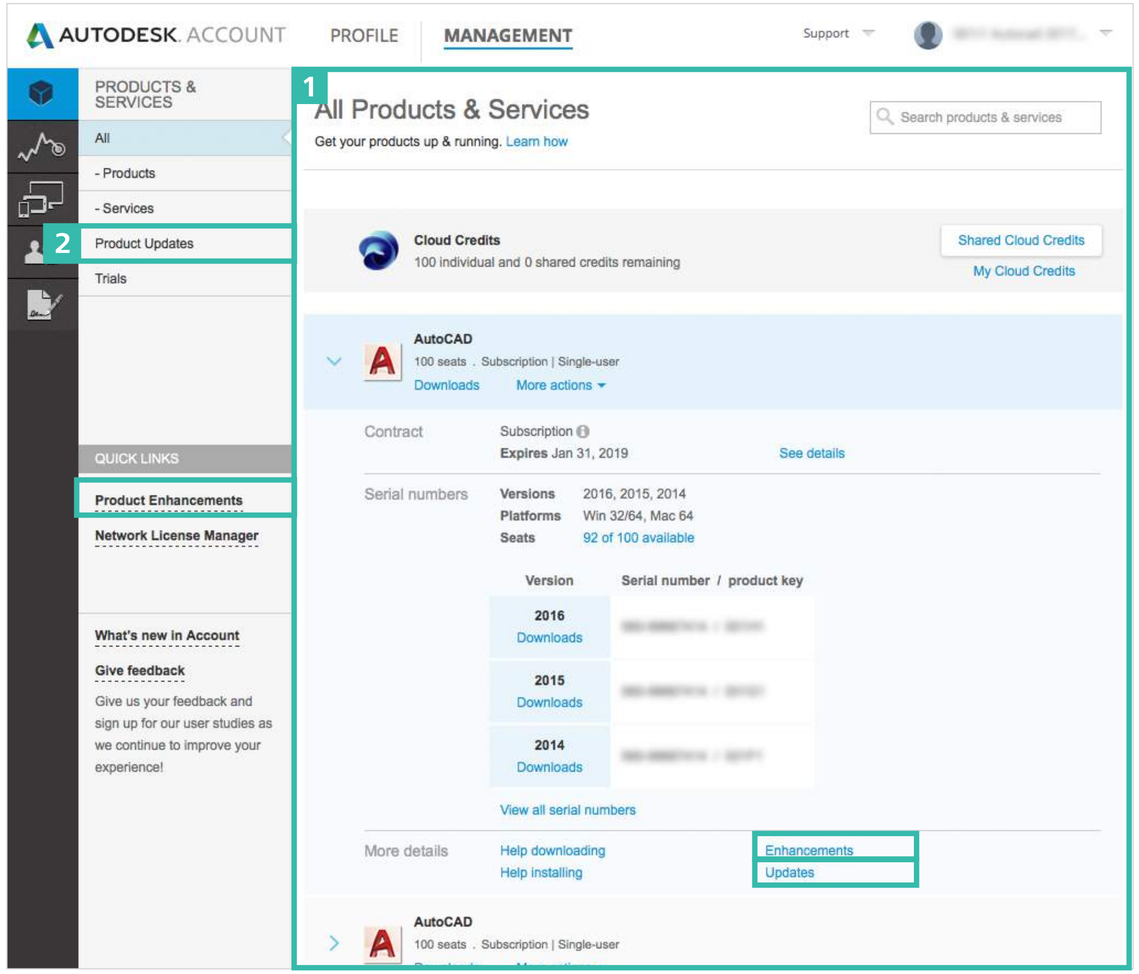

OTHER NOTABLE DETAILS:

1. **Products & Services will display different information** depending on the permissions of the signed in user.
2. **Product Updates are accessible here.** All Admins (Contract Managers and Software Coordinators) and Users (with permission) can access any product update, enhancements and extensions. Open the drawer to reveal more details.

NOTE: Older Product Updates - To access product enhancements and updates for 2015 products or earlier, use the Quick Links menu item **"Product Enhancements."**

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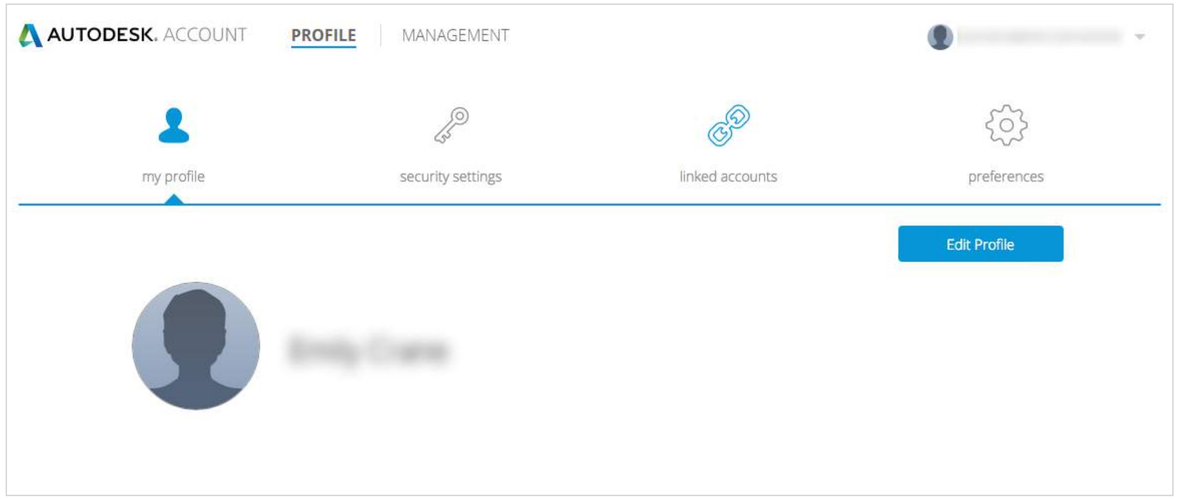
Set Up/Update Your Profile

One of the most important things you can do is to make sure the information on your Autodesk Profile is correct and key account preferences (e.g., language) are set.



My Profile

This profile is your professional presence across Autodesk properties and applications, including collaboration pools, forums and services. Here you can add personal information like a bio, professional information and an address.

BEST PRACTICE

Set up your profile and keep it current. Set up your profile completely when you first sign in and edit it whenever information changes to keep it up to date.

IMPORTANT

Profile information is strictly for personal use and will not affect your global Autodesk system of record. For example, the address here is NOT the billing or shipping address.

To update your shipping address, contact your reseller or Autodesk customer service.

Learn more on **how to update billing information for your subscription**.

More about this step on the next page

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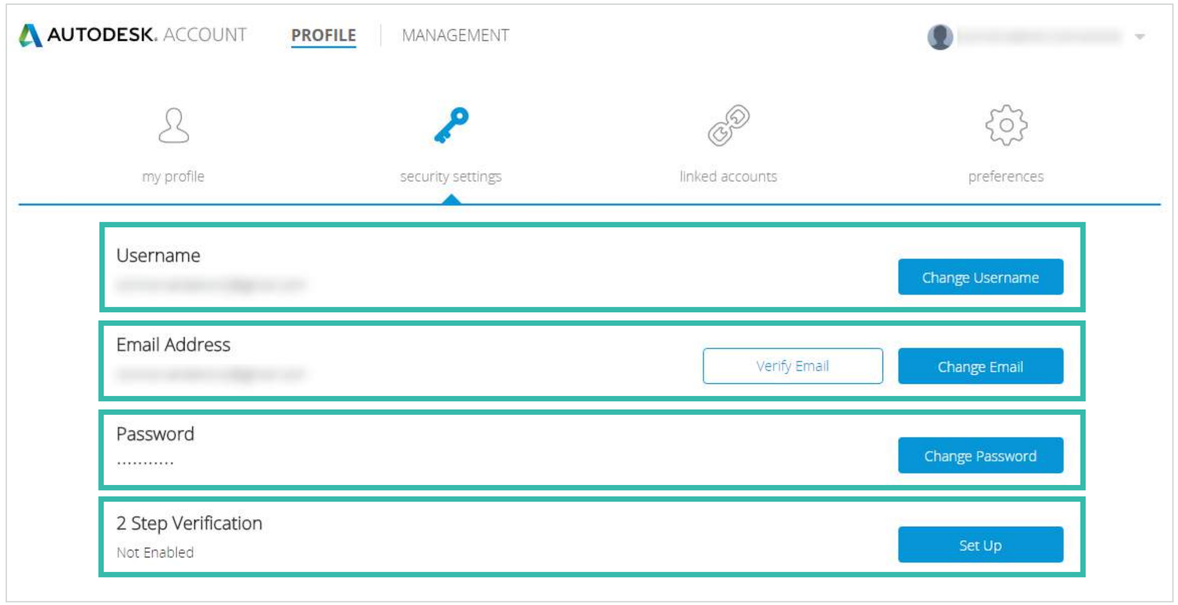

Security Settings

This is where you will see your **Username**, as well as verify and change your **email address** and **password**.

BEST PRACTICE

Keep your email address current. Keeping your email address updated will ensure that you will receive the latest information, access to any new benefits, renewal notification emails, and other important communications.

Add an extra layer of protection to your Autodesk Account by setting up 2 Step Verification. Once you complete the simple set up process, whenever you sign in to your Autodesk Account, you'll be requested to provide both your password and a security code that is sent to your phone.

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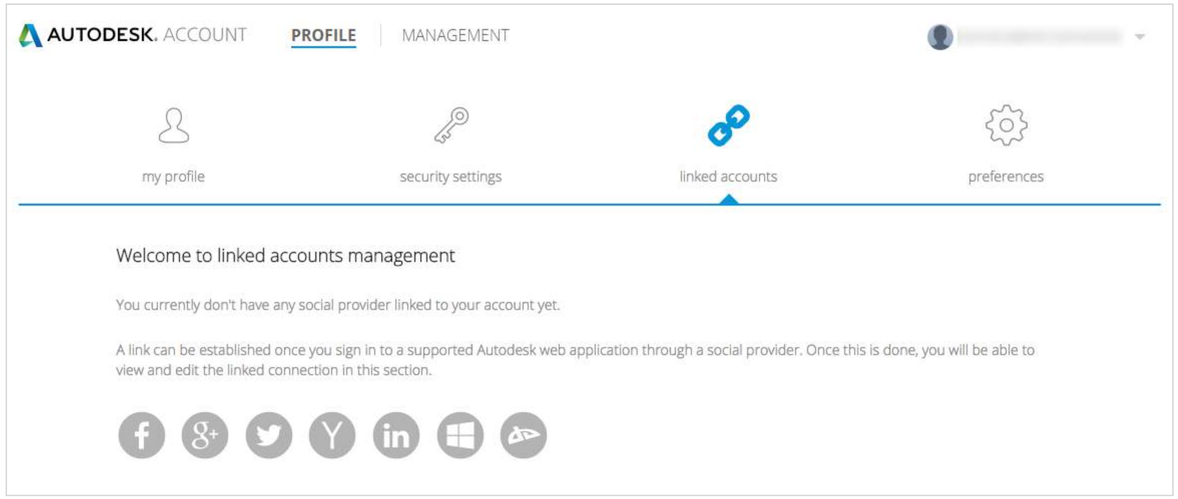

Linked Accounts

As part of creating your professional Autodesk profile, you can also link to a variety of your key social media profiles.

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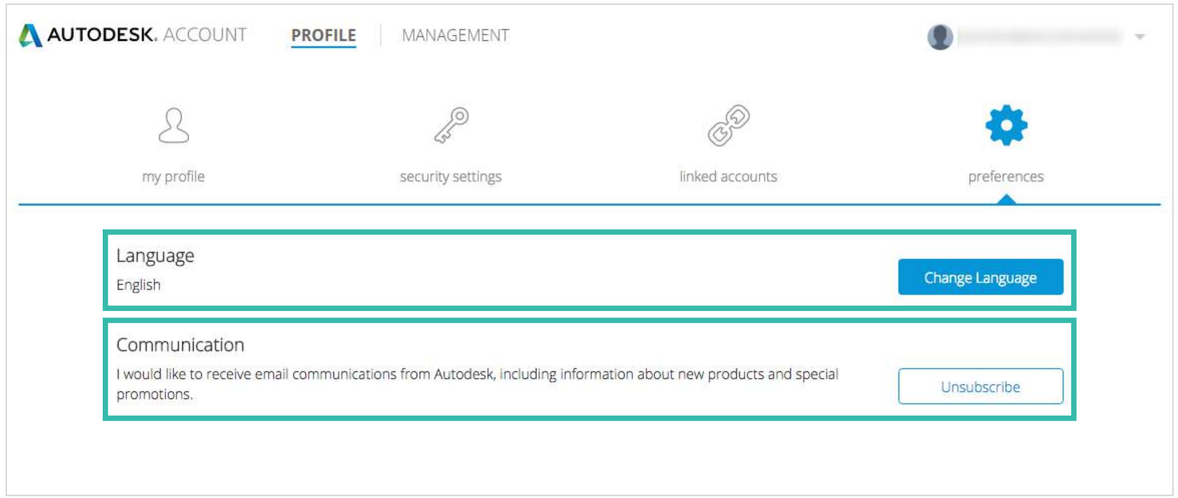

Preferences

LANGUAGE: Choose your language preference for Autodesk Account. This also impacts the language that will be used for ongoing important communications from Autodesk. This does NOT impact software use.

NOTE: By default, a user's language is selected by the Contract Manager. Once set up, users can change their language preference here.

COMMUNICATION: You can also elect to receive valuable communications from Autodesk about your products.

BEST PRACTICE

Sign up for communications. We recommend that you elect to receive email communications to stay in the know. These communications include valuable information such as getting started with products, product insights and best practice information.

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Set Up a Software Coordinator (if needed)

NOTE: This section is only relevant if you plan to identify someone to support the management of your subscription and Users.

Contract Managers can assign a **Software Coordinator** to help them manage a group of users per serial number or group of products. A Software Coordinator is a person who will receive notifications about product releases, can set up Users, view serial numbers and product keys, as well as request previous versions and home use licenses. See **Capabilities Matrix**

Not every Contract Manager will need a Software Coordinator. However, larger teams or situations where there is an individual/ IT Manager tasked with installing the software, as opposed to subscribing to the software, will often call for a Software Coordinator.

NOTE: Only Contract Managers can assign (or change) Software Coordinators. If a Software Coordinator is not assigned, the role's capabilities will default to the Contract Manager.

TIME ALERT

Processing Time

It may take hours for the system to show Admins that Software Coordinators have been newly assigned.

BEST PRACTICES

Assign your Software Coordinator early on, if applicable. If you know your Software Coordinator will be responsible for managing users, consider adding them first and then let them do the following steps to become familiar with the systems as they set up users and give access to products and benefits.

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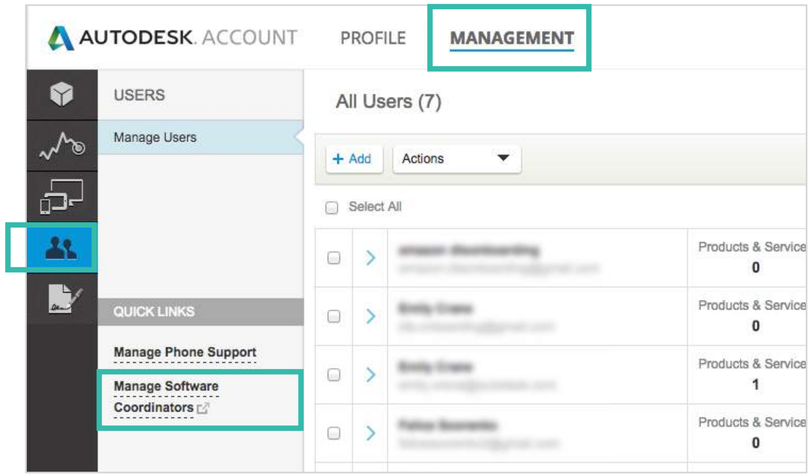
Set Up a Software Coordinator (if needed)

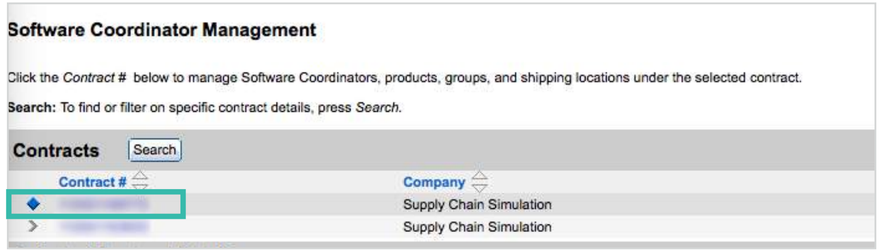
How to Add a Software Coordinator

1. Select **Management** in the top menu within your Autodesk Account to view your Products & Services.
2. In the left navigation, click on **Users.**
3. Click the **Manage Software Coordinators** link on the Manage Users screen in the Quick Links area.
4. A new window will open up for Software Coordinator Management.

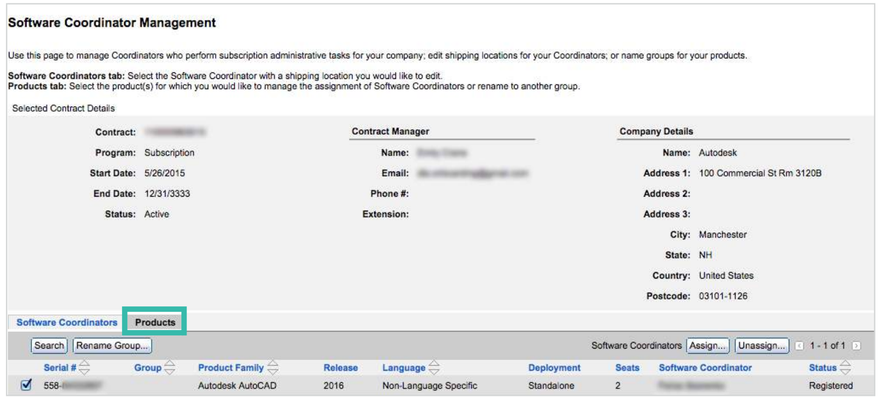


NOTE: Autodesk Account uses the Contract Manager as default Software Coordinator until another user is assigned the role.

5. Select the **contract number** associated with the software and the user you wish to manage on this screen.



6. To add the Software Coordinator, click the **Products** tab to access settings for assigning a coordinator to a product or group of products.



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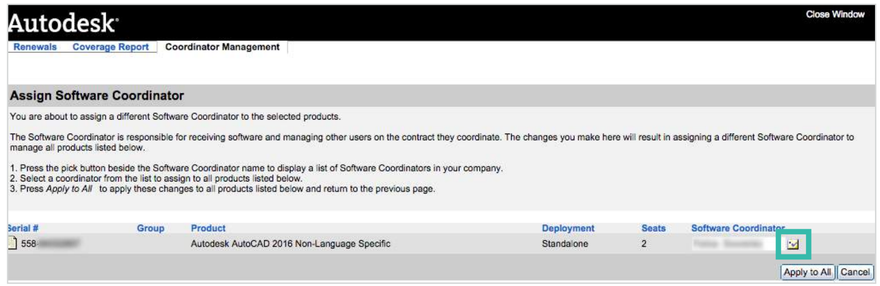
Set Up a Software Coordinator (if needed)

How to Add a Software Coordinator

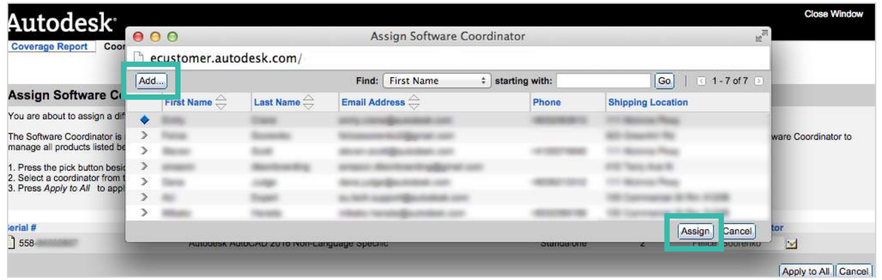
7. **Check** the products you wish to assign to a coordinator and click the **Assign** button.

NOTE: A Contract Manager can set up separate Software Coordinators for separate products.

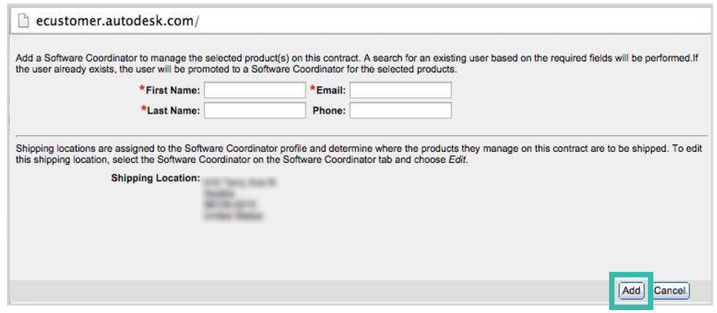
8. Click the **email icon** button next to the Software Coordinator field to get the Assign Software Coordinator pop-up window.



9. Click the **Add** button or Search (and Go) to designate a NEW Software Coordinator OR select from the list of existing Software Coordinators by clicking on the arrow in the first column next to the user's name. When you are done with the process, click the **Assign** button to confirm your choice.



10. If you are adding a new Software Coordinator who does not come up in Search, click "Add" (in the previous step), complete the requested information and click the **Add** button here.



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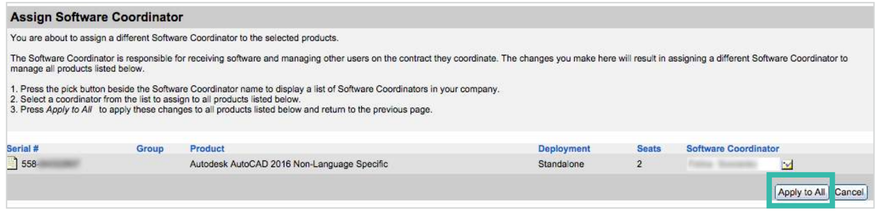
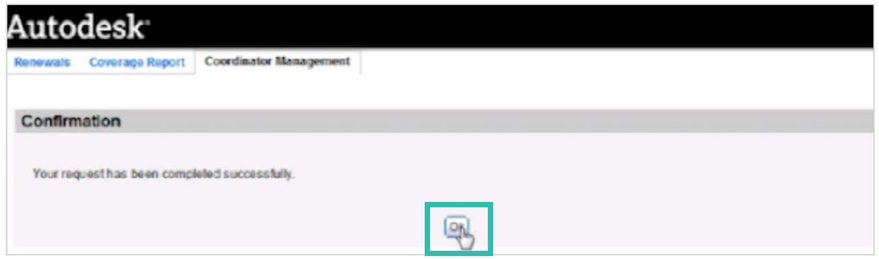
Set Up a Software Coordinator (if needed)

How to Add a Software Coordinator

11. Click the **Apply to All** button to commit your change.



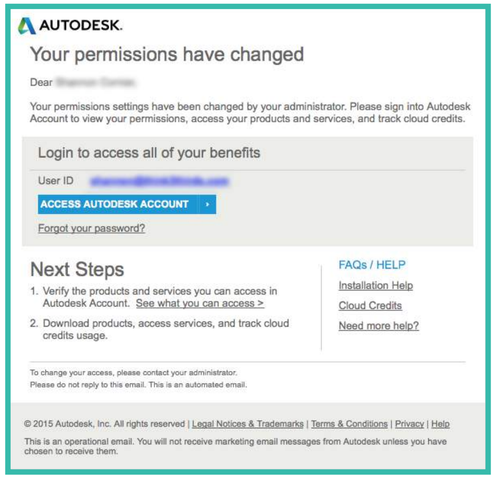
12. Click **Ok** on the resulting Confirmation screen. This will also trigger an email to the newly assigned Software Coordinator.



More information: **How to change the Software Coordinator**

13. Upon set up completion, the new Software Coordinators will receive a **"Your permissions have changed" email** telling them about the role shift and new benefits.

    New Software Coordinators will need to accept the updated terms and conditions for this role when they sign in to Autodesk Account to access additional user management tools and subscription information for the first time.



BEST PRACTICE

Check the Software Coordinator status. Contract Managers should check on the User Management page to confirm that Software Coordinators have been successfully assigned. If this isn't showing within 24 hours, the CM should log a support case for fastest resolution.

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Set Up Users

Before users can download, install and use their subscription products and benefits, the Contract Manager or Software Coordinator MUST **(1) add the users in Autodesk Account** AND **(2) give users access** to products and benefits.

This two-step setup process is often called **Naming Users** or **User Management.**

SINGLE OR MULTIPLE USER SETUP

Autodesk Account allows you to add a single user or enter a list of multiple users and assign the same benefits to all users at one time. Users will be notified of any addition to a contract or change in benefits at the email address associated with their User ID.

BEST PRACTICE

Be Prepared. As noted in the **Before You Start** section, gather together necessary information for each user: First name, last name, User ID, and associated email address.

IMPORTANT

NO USER ID YET?

The User Setup process will create an User ID for users who do not already have one. **Users should wait for their Get Started email** (or Change in Benefits email) to arrive and sign in with the specified credentials. Users **should not** create their own additional account.

SETTING UP CALLERS

Setting Up/Naming Callers for phone support is a different process from naming Users for product and service access. Contract Managers and Software Coordinators with Advanced Support plans can uplift which Users are able to call 1:1 telephone support as part of Advanced Support benefit. This designation is what makes a User also a **NAMED CALLER**.

Named Callers MUST FIRST BE Named Users. See how to **Name Callers**

More about this step on the next page

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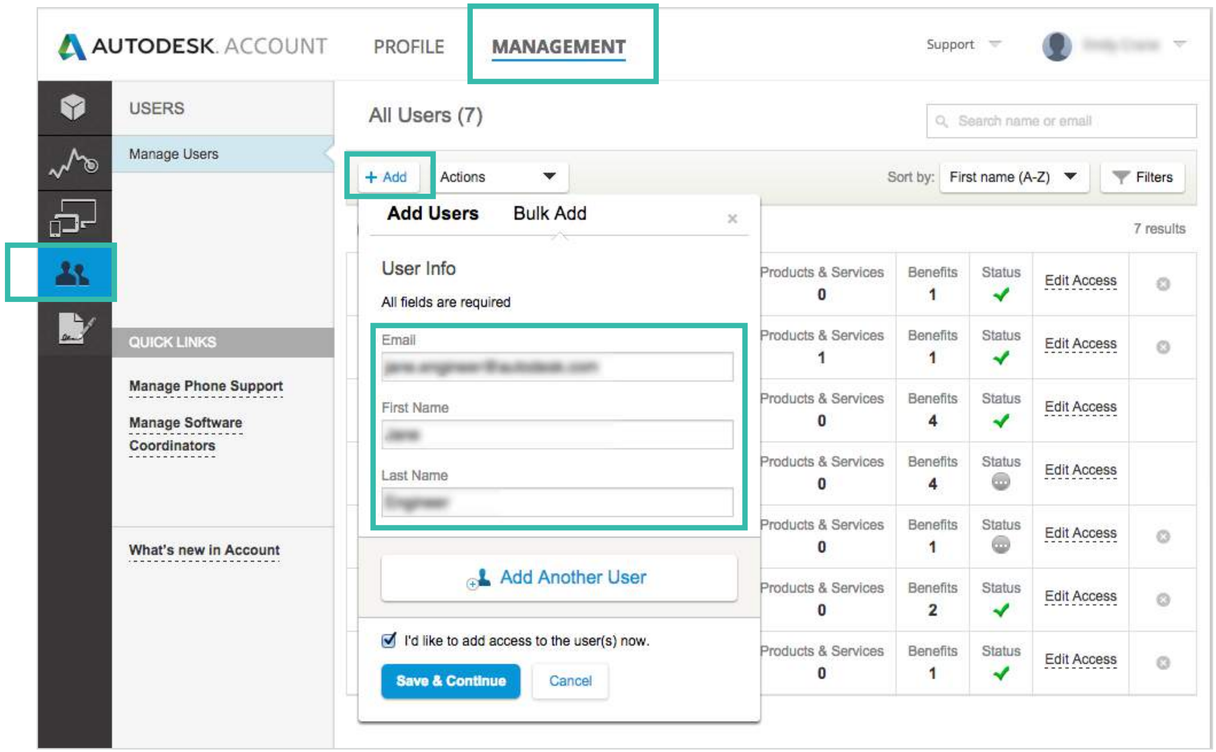

How to Add a Single User

If you would like to add more than one User at a time, please see the next section on how to add multiple Users.

1. Select **Management** in the top menu within Autodesk Account to view your Products & Services.
2. In the left navigation, click on **Users**.
3. Click the **+ Add** button to activate the Add Users window.
4. Enter the **email address, first name and last name** (all are required). Be sure to enter the email address already associated with the User's ID.

NOTE: If this **User ID already exists,** this step will link the User to your subscription contract. If it does not already exist, this step will create a new User ID for the User with the entered information.

More about this step on the next page

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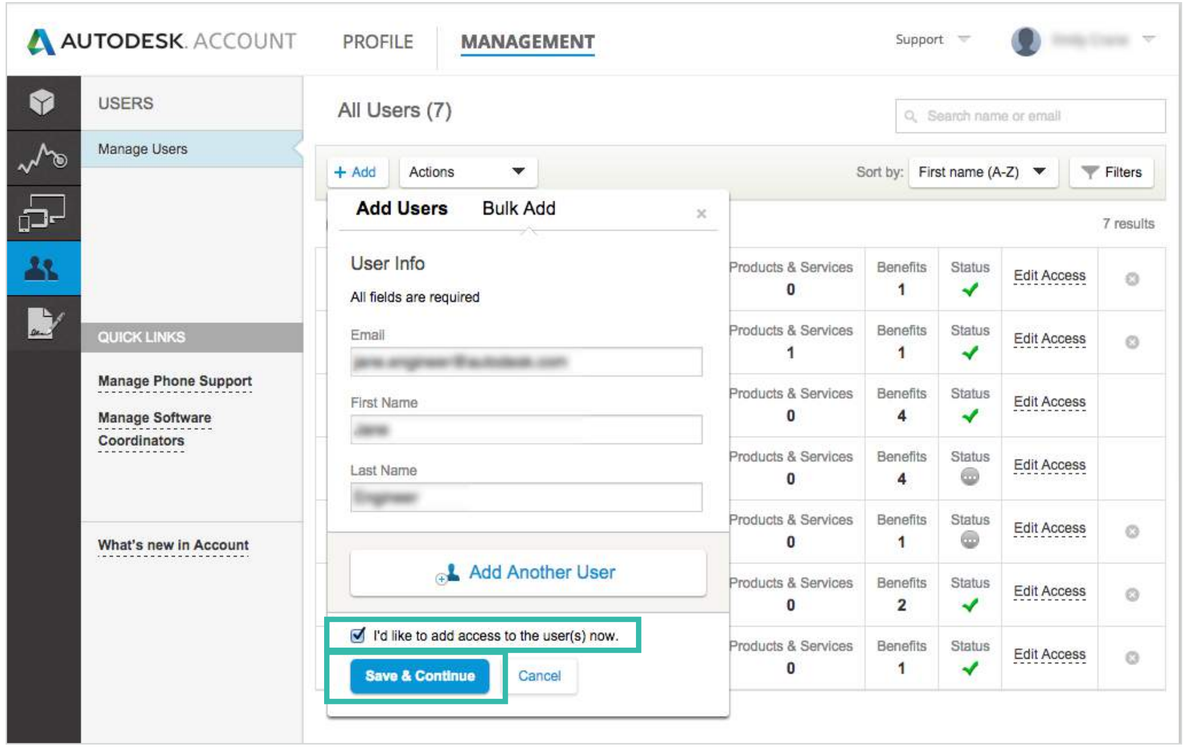

5. Check **"I'd like to add access to the user(s) now"** if you wish to manage access to products and benefits.

NOTE: Added Users will have access to an Autodesk Account but will NOT have access to products and benefits until they are assigned (Step 8).

6. Click the **Save & Continue** button if you are done.

NOTE: Clicking Save & Continue will send a Get Started email with sign in credentials to this new User.

7. If **"I'd like to add access to the user(s) now"** was checked, this process continues to the next section: Step 8: Give Users Access.

More about this step on the next page

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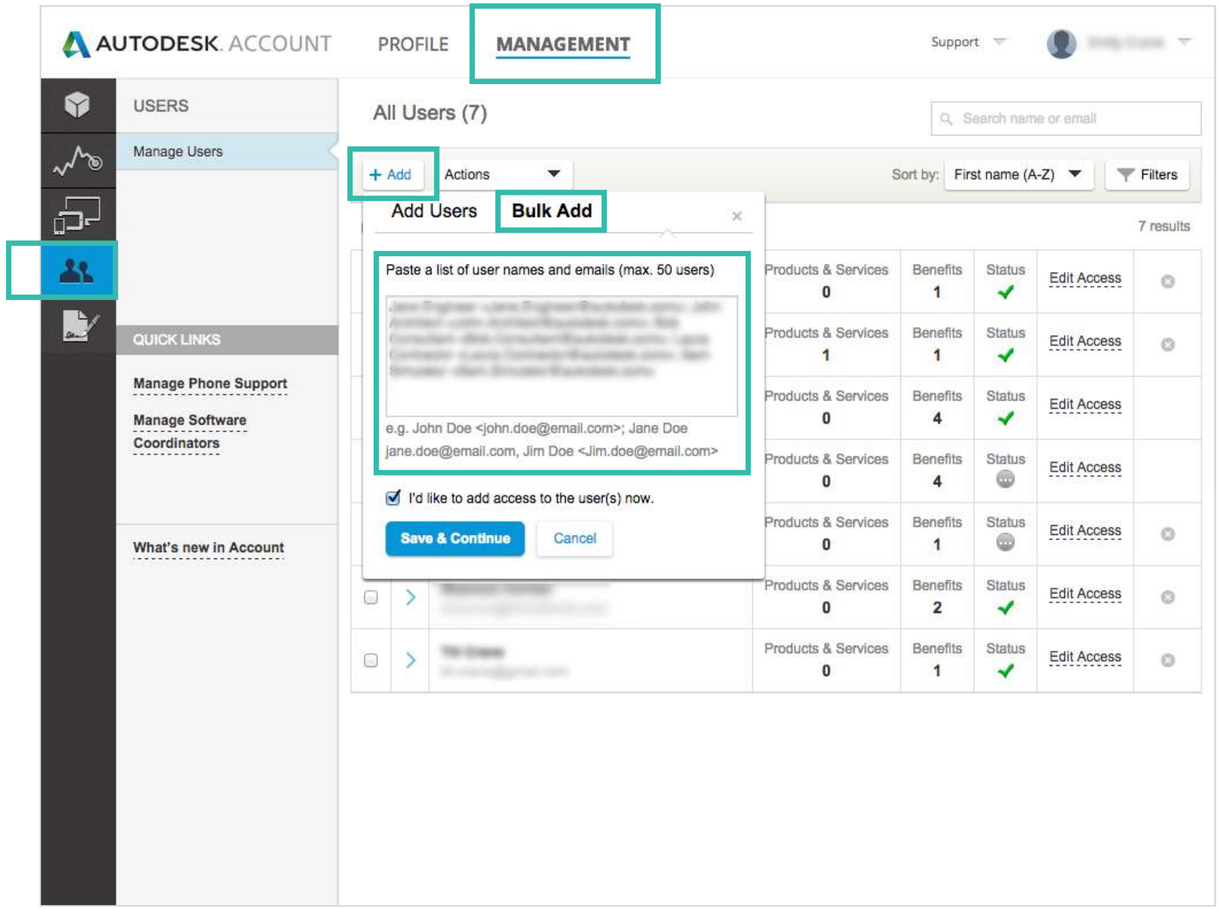

How to Add Multiple Named Users

1. Select **Management** in the top menu within Autodesk Account to view your Products & Services.
2. In the left navigation, click on **Users**.
3. Click the **+ Add** button to activate the Add Users window.
4. Click **Bulk Add**.
5. Type or paste a list of Users into the **entry field** following the example provided. As many as 50 Users can be entered at one time.

NOTE: If the entered User IDs already exist, this step links the Users to your subscription. This step will create a User ID for any new Users.

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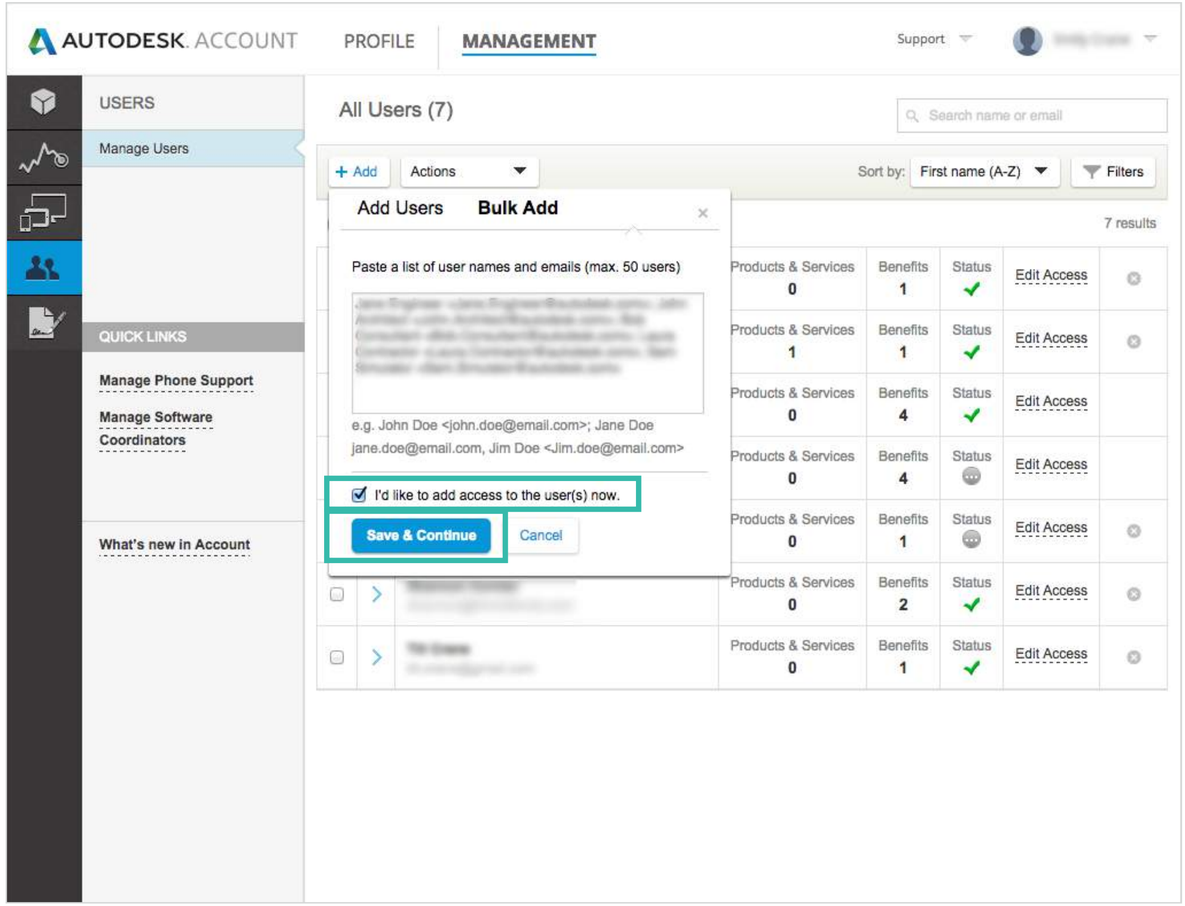

6. Check **"I'd like to add access to the user(s) now"** if you wish to manage access to products and benefits.

NOTE: Added Users will have access to an Autodesk Account but will NOT have access to products and benefits until they are assigned (Step 8).

When you set up multiple Users and check "I'd like to add access to the user(s) now," ALL Users will be assigned identical permissions and access. If you wish to have access to benefits, products and services individualized, it is best to add these users separately or uncheck the box to add access now.

7. Click the **Save & Continue** button. Added Users will receive a Get Started email that welcomes them to subscription.

NOTE: Clicking Save & Continue will send a **Get Started email** to all Users listed in this step with their sign in credentials.

8. If **"I'd like to add access to the user(s) now"** was checked, clicking Save & Continue will automatically continue this setup process in the next section: Step 8: Give Users Access.

More Information:
User Management Video Tutorial

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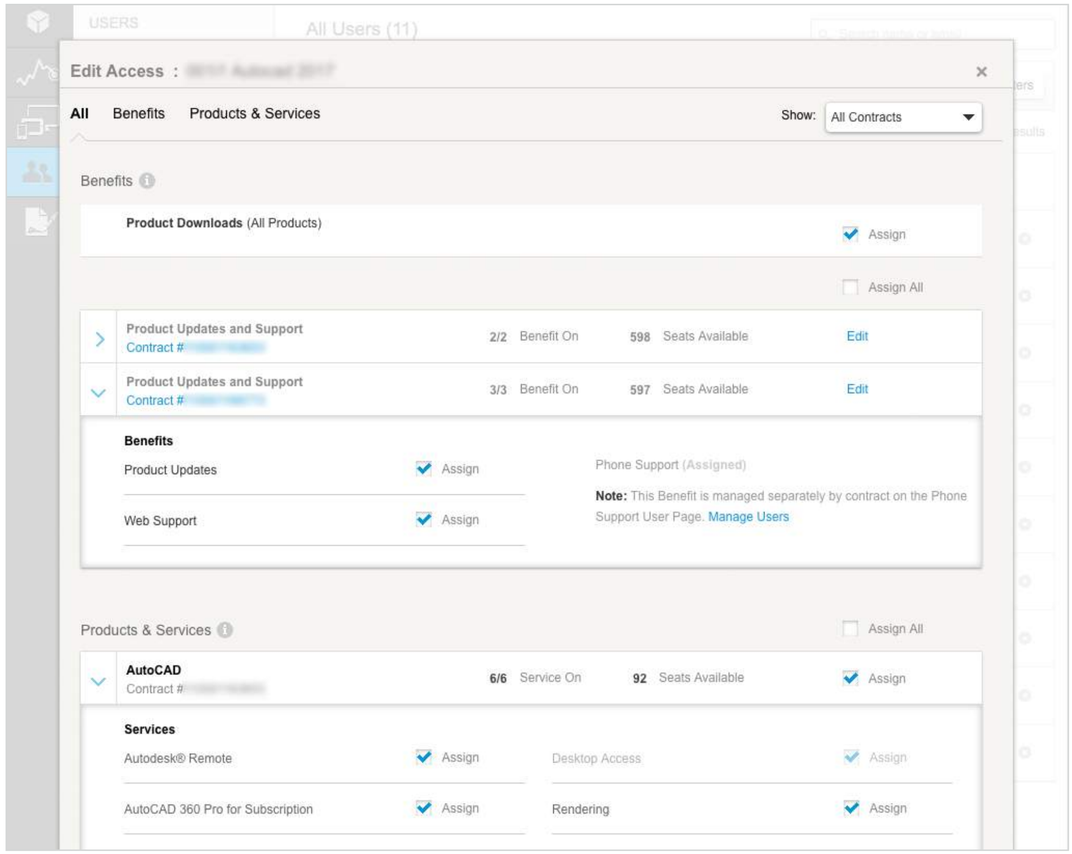
Give Users Access to Products and Services

Contract Managers and Software Coordinators can add or remove access to products, cloud services, and subscription benefits for Users on a subscription contract in Autodesk Account. This must happen after Users are set up in order for Users to access any of their subscription privileges.



BEST PRACTICE

Give Users access rights after you first add them (Step 7). In this linear setup process, the Edit Access screen, which allows you to give access to Users, will automatically open after Step 7, when "I'd like to add access to the user(s) now" is checked.

NOTE: User permissions can be easily managed and altered any time through the Users List and "Edit Access" actions in Autodesk Account. **Learn more**

More about this step on the next page

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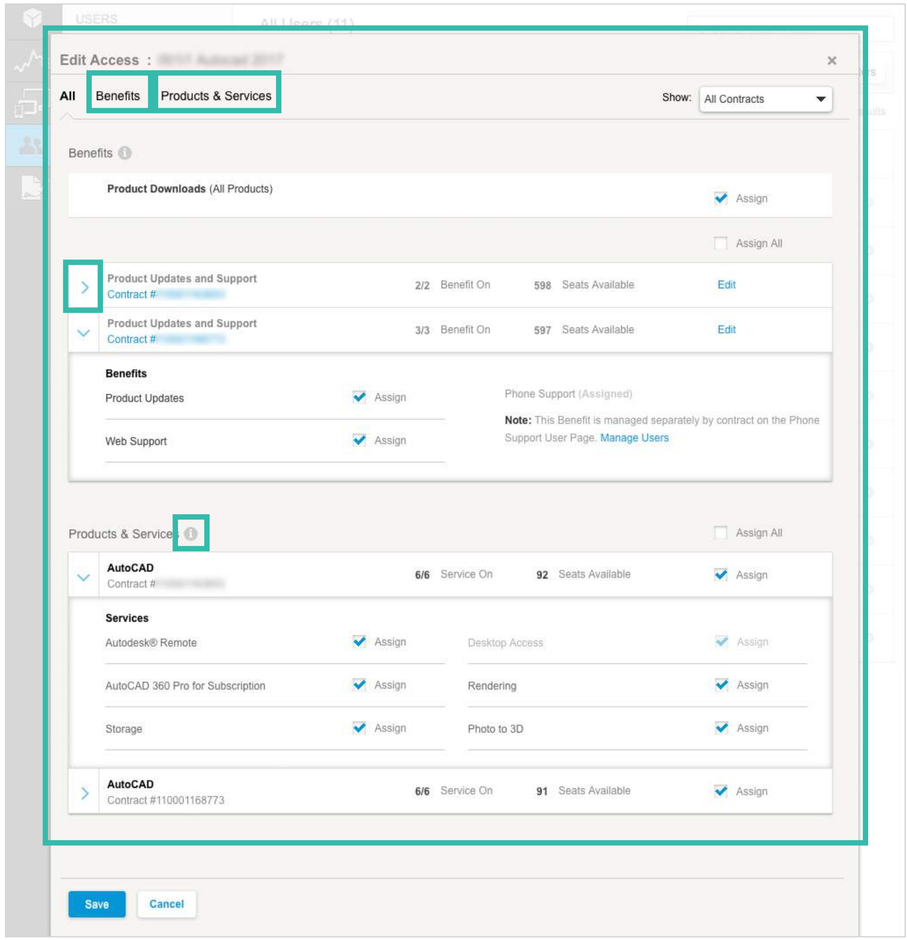
NOTE: Pay attention to the **names** at the top of the window. If more than one User is listed, ALL Users will receive the same access configurations by default.



How to Give Users Access to Products & Services

The **Edit Access** window groups options by **Benefits** and **Products & Services** and allows you to customize the access per User or in a group (when more than one User was added/selected).

1. **Open the drawer** (toggle arrow) to expand the detail display for each Benefit and Product to make assignments to the User.
2. Click on **the "i" information icon** to review your subscription benefits details.

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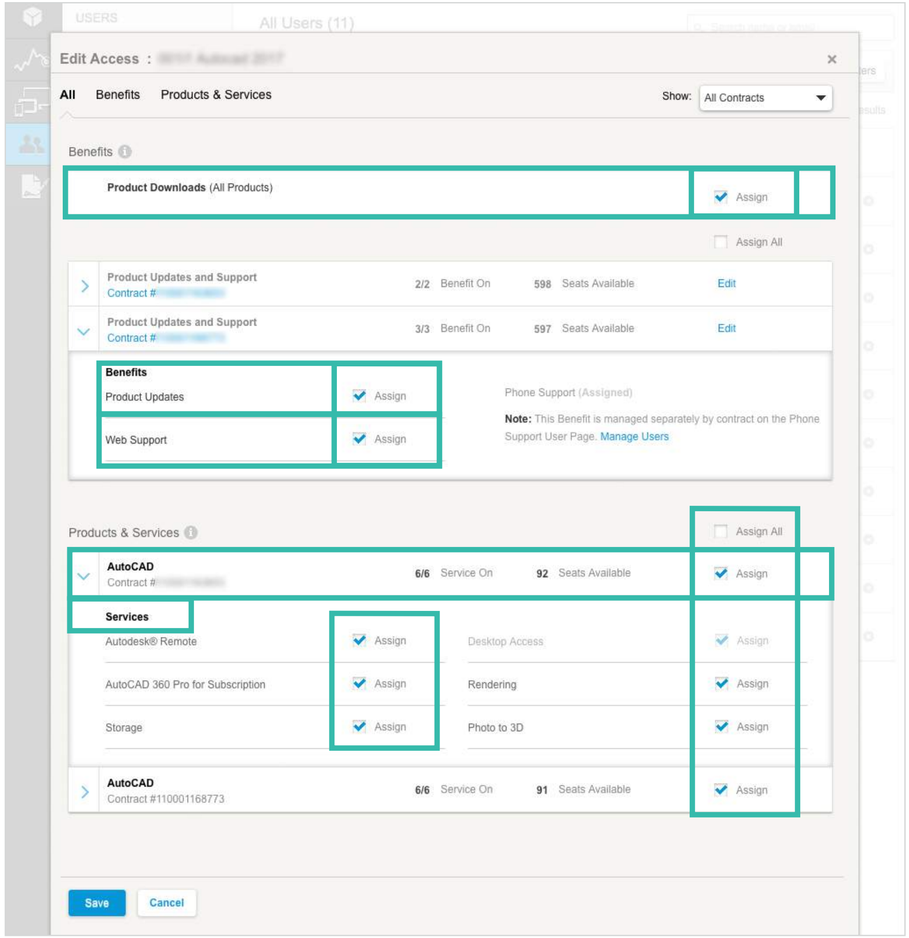

3. **Manually assign the access** by checking the box or pulling down the menu item for EACH of the appropriate drop-down assignments (multiple Users) to accurately assign benefits and services by product to the Users.

CLICK TO LEARN ABOUT BENEFITS, PRODUCTS & SERVICES

- **Product Downloads**
- **Web Support**
- **Product Extensions / Updates**
- **Products**
- **Services**

BEST PRACTICE

Give ALL Users access to Web Support here. All subscription Users have access to basic support, which includes 1:1 Web Support and Expedited Forum Support. However, Users must be first granted permission to use Web Support **before** they can access these benefits.

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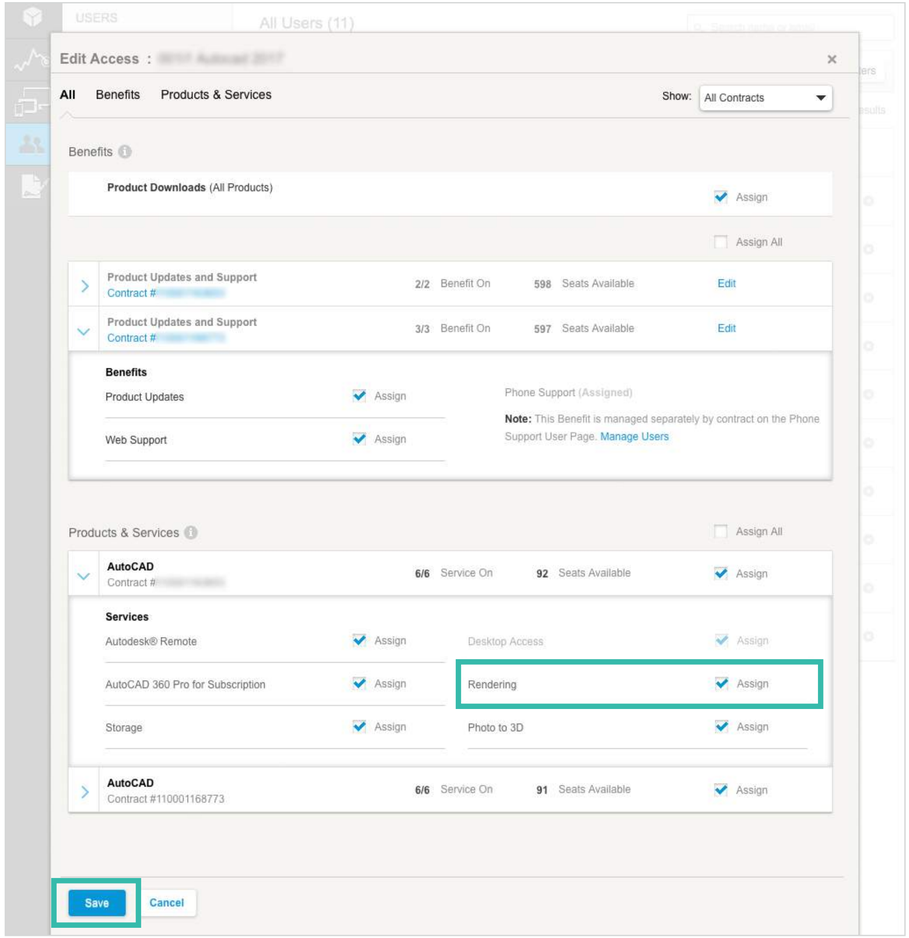

4. **Assign specialty web and cloud services,** such as Rendering, ONLY to those who need it.

NOTE: Some web and cloud services, such as Rendering, require the use of cloud credits*. All assigned users will have access to the same allotment of cloud credits. If you assign Rendering to all users, your team may use up the cloud credits faster than intended.
Learn more

**Subscription may include an allocation of cloud credits. You can purchase additional credits if needed.*

5. After assigning benefits, products and services to all Users, hit **Save** to continue.

NOTE: Once a User is assigned benefits, products and services by the Contract Manager or Software Coordinator, the User will receive an email letting them know that their **permissions have changed.** This email will include a sign in link to Autodesk Account so the User can access updated benefits and products.

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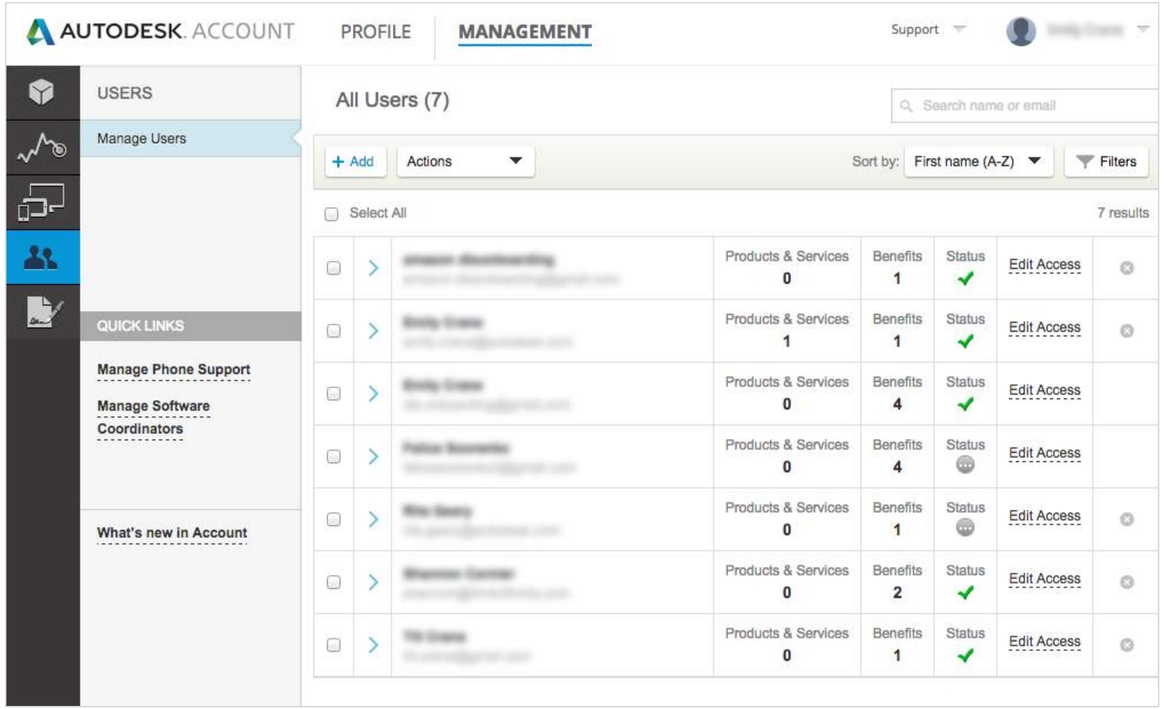

BEST PRACTICES

Check in with Users.

It is important to check in with new Users to confirm they are able to successfully access the products and benefits. If there are problems, it is the responsibility of the Contract Manager or Software Coordinator to notify Autodesk by logging a support case so that we may resolve issues quickly.

Check your User status.

Contract Managers and Software Coordinators should go back to the Products and Services Manage Users page to confirm that any Users assigned to products and benefits have successfully signed into their Autodesk Account. Status will show as a **check mark** if they have logged in successfully or **grey pending** if they have not.

More information:

Setting User Permissions

User Management Video Tutorial

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Download & Install Products

Preparing System for Installation

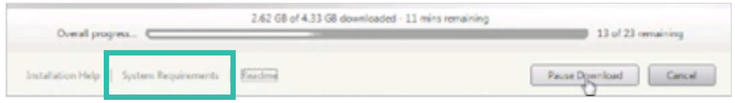
It is **strongly recommended** that Contract Managers and Software Coordinators review all system requirements **before** installing software to ensure a system is optimized for download, installation and using the software.

Be proactive. Perform an initial check of your system before even downloading the products. Try the following links for more information:

Full list of System Requirements for Autodesk Software

Preparing your System for Installation

NOTE: You can also look for the **System Requirements** link at the base of Product Install screens.



BEST PRACTICE
Take a few moments to **review all system requirements before installing software.**

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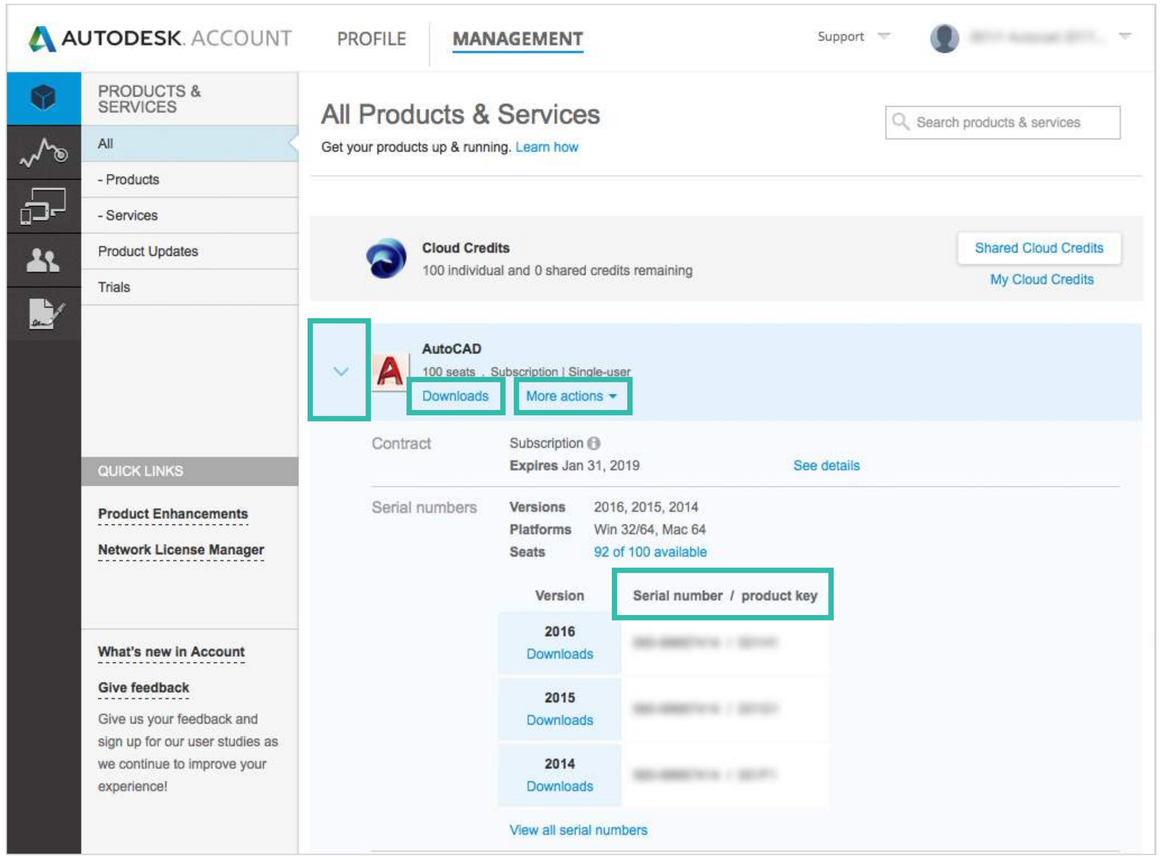
Download

Contract Managers, Software Coordinators and Users with download privileges can download directly from the **Products & Services** page.



IMPORTANT
Single vs. Multi Seat
The following steps will walk you through a single seat installation. For contracts with multiple seats, each installation will follow the same process.

How to Download and Install

1. Click the default **"Downloads" button** associated with the desired product. A new window will appear.

NOTES:

a. **Open the drawer** if you want to see additional files. You can also access **serial numbers and product keys** here.

b. The **"More actions" menu** will offer direct links to Manage User access to product versions.

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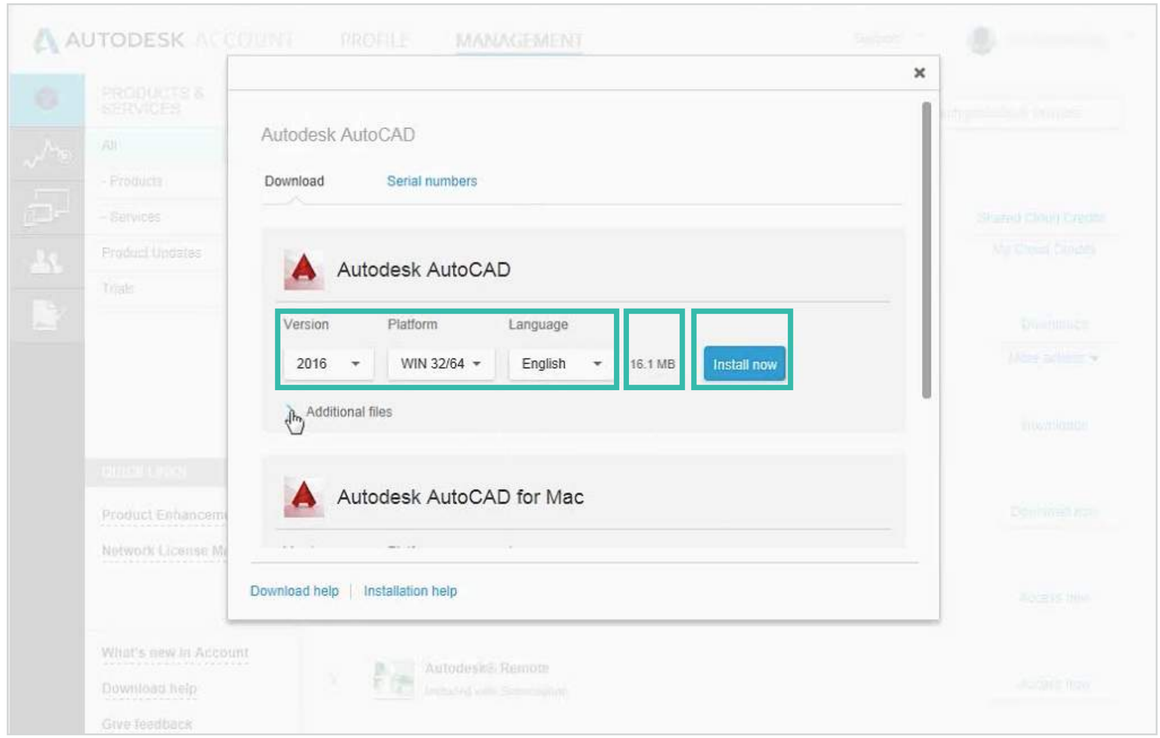

2. Select the **Version, Platform** and **Language** you want.

NOTE: Users are entitled to eligible previous versions of the current release.

3. This window also shows an **associated file size**.

NOTE: This is the compressed size for download, not the uncompressed file size for installation.

4. Click **Download Now** or **Install Now**.

Depending on the product to which you've subscribed, there may be up to three different ways you can download and install your software **(Install Now, Download Now, Browser Download)**.

In most cases, Install Now is the fastest option (and also the best option for end users). **It is recommended that you install with the action that is defaulted to you.**

NOTE: Autodesk will set the default option based on the user type and product file availability. If the user is either a Named User or the Admin (CM/SC) with a single seat contract, the button will default to **Install Now**. If the user is an Admin of a multi-seat contract, it will default to **Download Now.**

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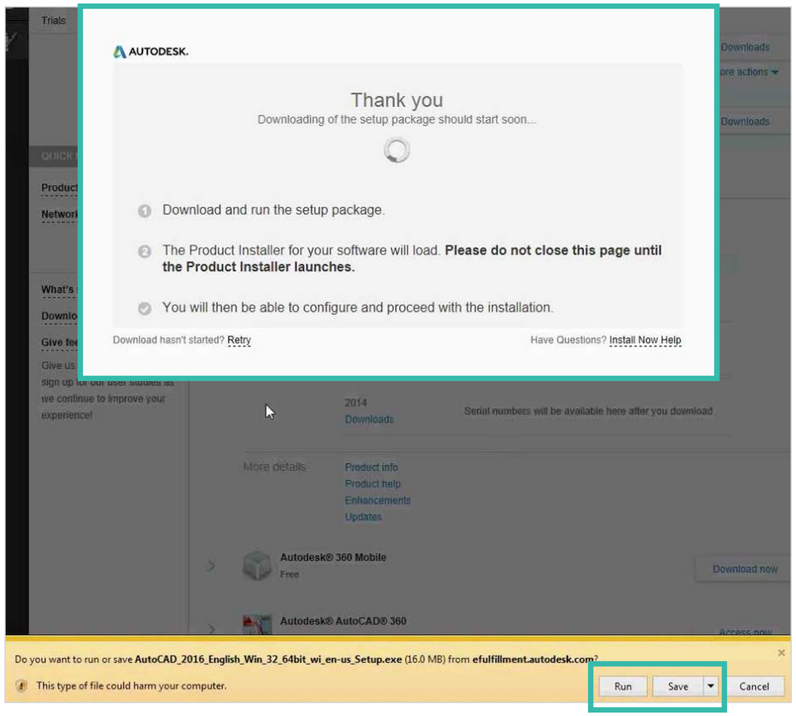

More information:
[Download methods for Autodesk Account]
[Software & Download Support]

5. Accept Terms and Conditions, and click **Install**.
6. You should receive a **Thank You message**.
7. When prompted, you can either **Run** or **Save** the downloaded file.

   If you hit RUN, it will start the installation. An immediate installer will automatically pull in your serial number information and get you up and running fastest. This method is recommended.

   If you hit SAVE, it will download the software to your Downloads folder and will not actually install the software at this time.

NOTE: All products can be installed up to 30 days (after downloading) without a serial number. You will need to enter your serial number information separately if you wait longer than 30 days after the installation date.

BEST PRACTICE
Keep all downloaded files together.
When you hit SAVE, you may download multiple files. If they get separated, you might get an error when the files try to extract as they search for all related files at the start.

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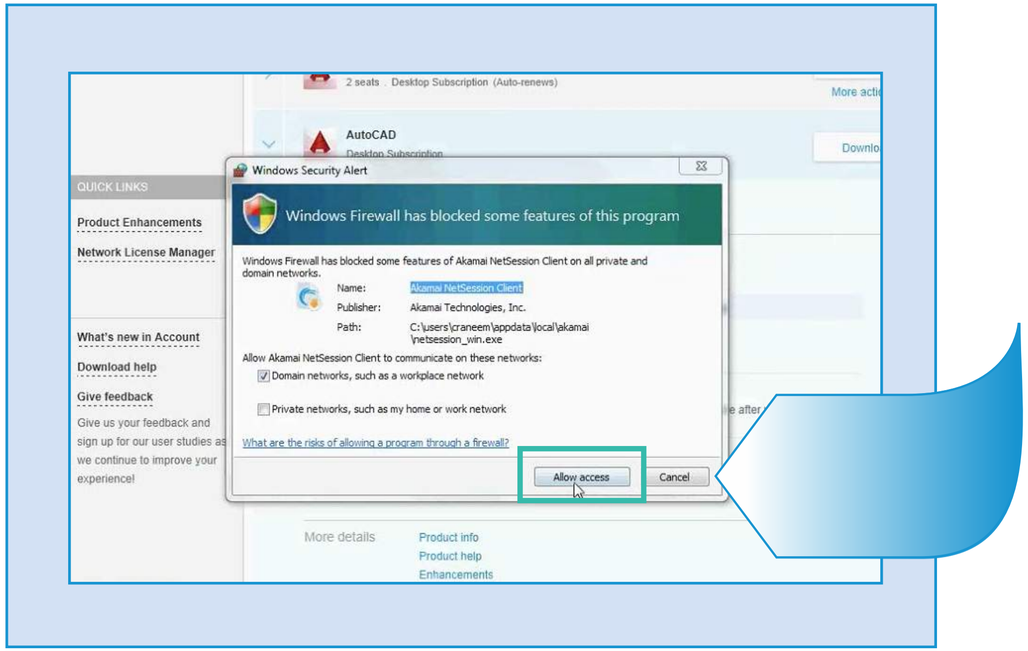
Download & Install Products

Akamai NetSession Firewall Message

If you see a message about your firewall blocking some features and asking if you want to allow access and install Akamai NetSession, you should hit **"Allow Access."**

Akamai NetSession is the software that Autodesk uses to help speed up the downloading and installation process by moving the downloadable content to a server physically closer to you.



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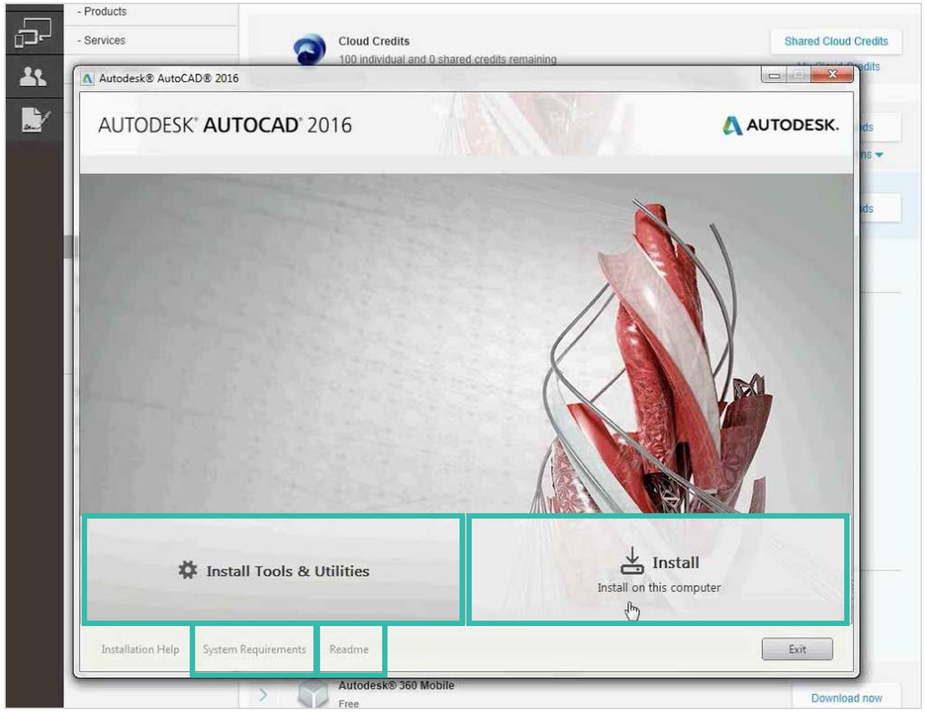
Install Products

Software installation can happen as part of the Install Now download method (recommended) or can be done at a later time after product files have been downloaded through the Download Now or Browser Download methods.

NOTE: The **Install Now** method must be completed while you are still signed in and connected to the Autodesk Account portal or it will fail.



The Install Manager will walk you through the necessary steps.

1. **Review System Requirements.** As previously noted, **we strongly recommend** that you review system requirements ***before*** installing software to ensure your system is optimized for download, installation and use of the software. Click on the System Requirements link or learn more here.
2. **Install Tools & Utilities.** It is not a requirement to install tools and utilities.
3. **Review the Read Me.** This link includes the latest information for your product.
4. Click **Install** to continue.

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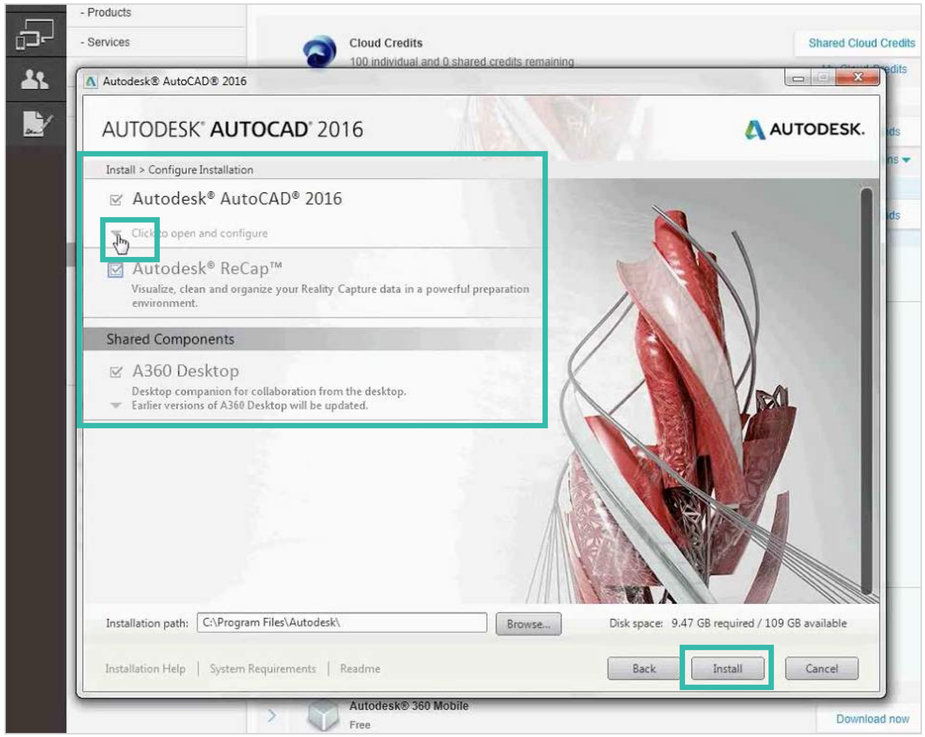

5. Next, the Install Manager will check to see what components you already have installed via other Autodesk software and then will offer you a screen to **choose the components** you would like to install.

6. If a custom installation is needed, hover over the product name and click the **toggle arrow** to open the configuration details.

NOTE: It is recommended that you install all components that Autodesk recommends. These recommendations are based on typical installation needs for the best product experience.

7. Click **Install** to continue.

BEST PRACTICE
Allow a desktop shortcut.
Autodesk recommends that you allow the icon/desktop shortcut to download to your desktop, as this will make it easier to launch the software once it is successfully installed.

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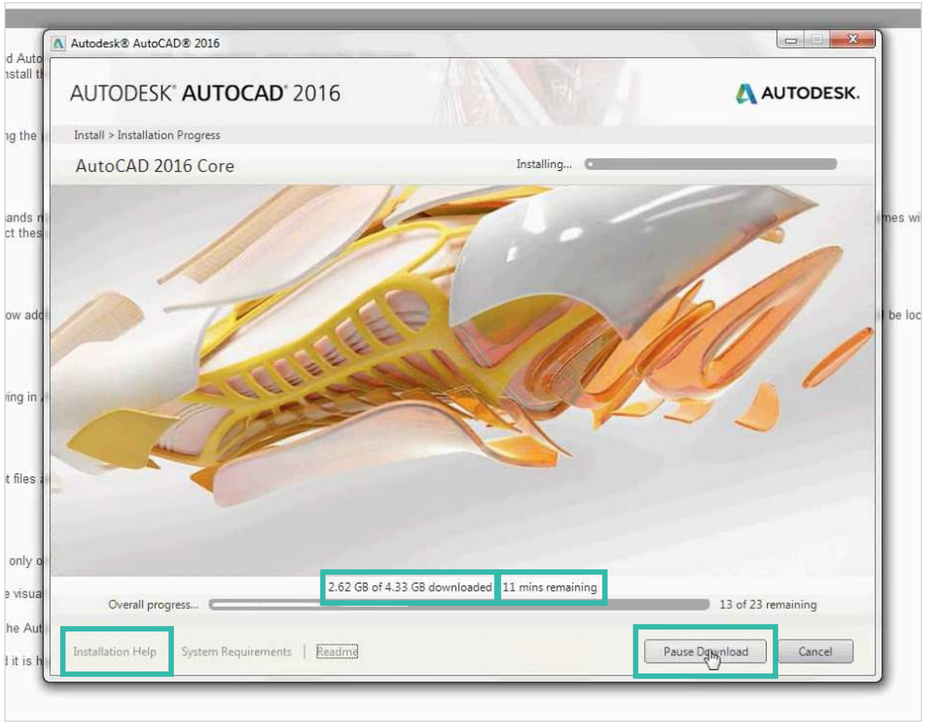

8. During download and installation, you will see the **time remaining** constantly recalibrating based on bandwidth and effort remaining.
9. The **total file size** numbers will also continuously adjust as files are downloaded, unzipped and installed.
10. To interrupt the software download for any reason, you can hit **"Pause Download."** This can be helpful if you need to change location mid-installation or will not have Internet access.

NOTE: The system will need time to resolve the installation task at hand and will pause when that task is completed.

Hit **"Resume Download"** when you are ready to continue.

11. For additional help with downloading and installing software, click **"Installation Help"** in the lower left corner of the Install Manager window.

NOTE: Clicking on these support links will NOT interfere with the product installation process at any time.

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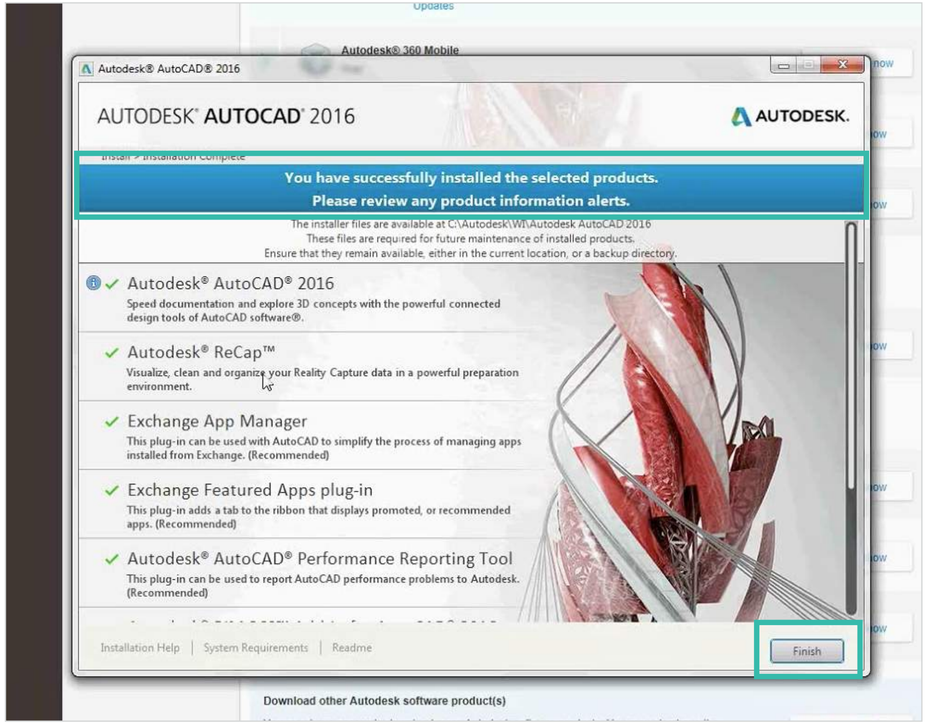

12. After installation is complete, you will see an **Installation Success message**.
13. Click **Finish** to close the installer. When the installation is finished you'll see a list of the software components that have been installed on your computer.
14. You will then be prompted to **restart your machine** to have all changes take effect.

More information:
Installation & Configuration Support

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Launch Software

After installation and rebooting your system it is time to launch and activate your software. You **must be connected** to the Internet to do this successfully.

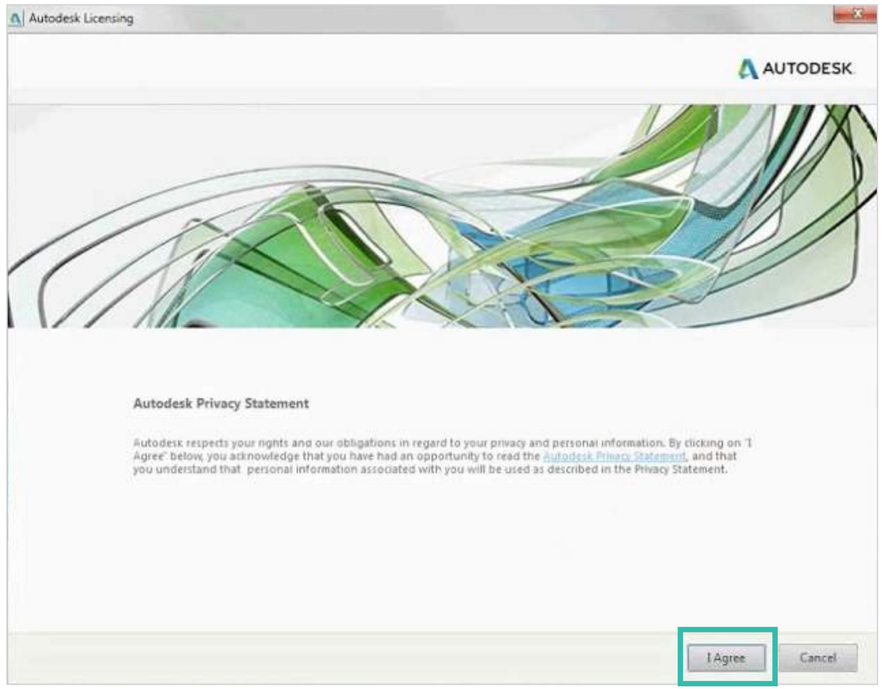
IMPORTANT

Subscription licensing technology occasionally requires a connection with Autodesk. It is first required when you initially access your product. This connection will complete the installation process by authenticating the license and User. Authentication will occur again periodically, about every 30 days or so over the term of the subscription.

1. Click on the product shortcut on your desktop.

NOTE: If you opted not to create a desktop shortcut, launch the product by going to the Start menu › Programs › Your Product.

2. You will need to **Agree** to the Autodesk Privacy Statement.



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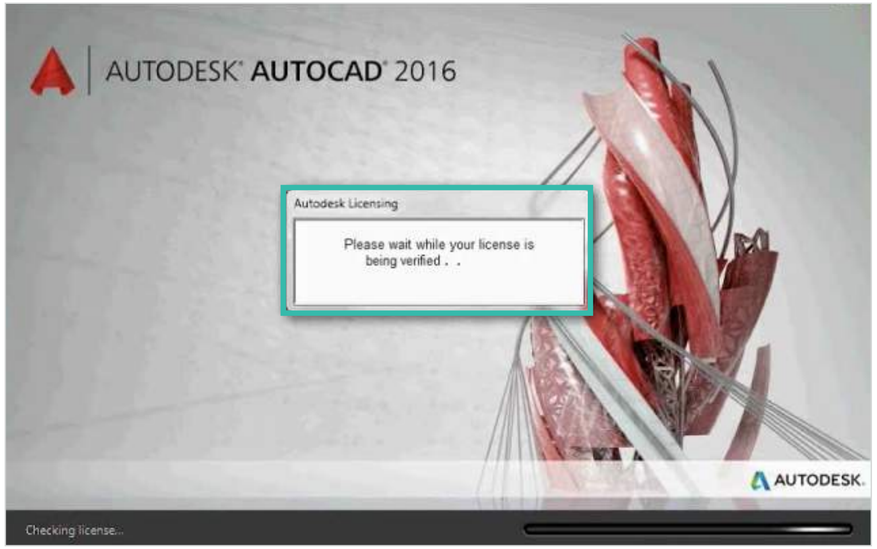
3. Upon launch, you will see an **Autodesk Licensing Verification** box.



4. Then, an **Autodesk Account Sign In** window will pop up.

5. Sign in using your User ID and Password to verify your identity and license. This window will pop up even if you are currently signed into Autodesk Account via a web browser.

NOTE: You must sign in at first launch and then again every 30 days to verify your identity.

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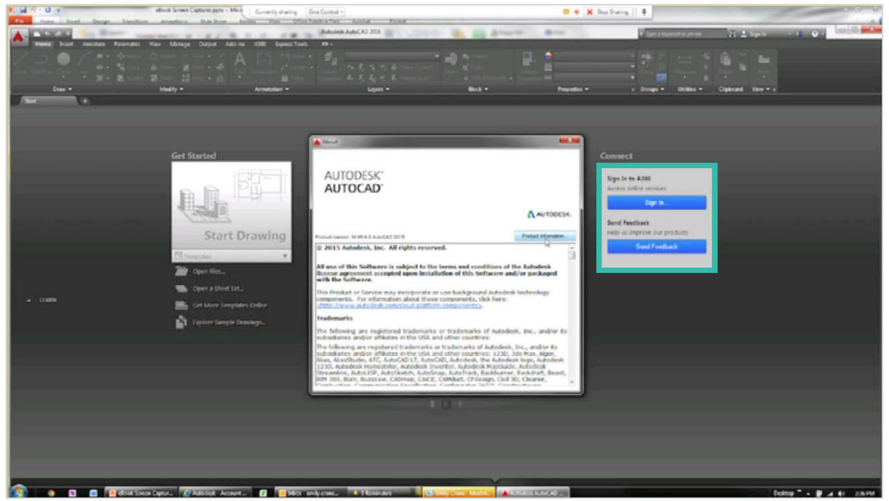
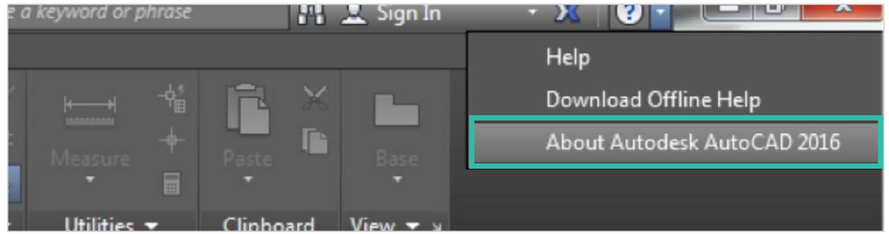
6. Once you've launched your product, you should be able to see your main interface.

7. You can also sign into the **A360 collaboration** and other tools from this screen.



8. See product details including serial number by clicking on **About** (in the upper right-hand corner).



9. Then click on **Product Information**.

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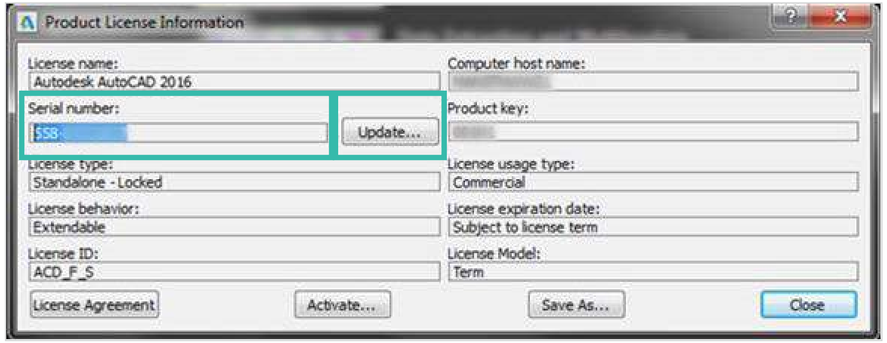
10. On the Product License Information screen, you will see your associated **serial number**. If you need to enter or update your serial number (provided by an Admin), click the **Update button**, enter the number and then click the Close button.



BEST PRACTICE

Update contract through only the serial number. If for any reason you change contracts, it is best to go to the Product License Information screen again to update your serial number. For example, if you have a recurring monthly contract and then move to a renewing annual contract, all you need to do is swap out the new associated serial number. You do not need to uninstall, reinstall and reactivate.

More about this step and troubleshooting on the next page

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Troubleshooting Activation & Activation Errors

If you have difficulties with product activation or get errors, please review the following information as well as the support links below.

CONNECTION ERRORS: Internet Ports 443 and 80 should be opened.

For companies that completely disable Internet traffic (blocking Ports 443 [HTTPS] and 80 [HTTP]), subscribing to Autodesk software is not currently an option. If, however, your company secures your network by routing Internet traffic through a proxy server (a standard proxy or an authenticated, password protected proxy), then a software subscription is still an option for you with a workaround known as "whitelisting."

Please check out these knowledge base articles that declare a set of Autodesk domains that can work within the proxy security settings:

Proxy server setting changes required to unblock Autodesk A360 services

Subscription Licensing Error: "Establish an Internet connection to continue"

More information:
OTHER ERRORS AND RESOURCES

How to set up McAfee ePolicy Orchestrator to allow Autodesk Products to work with Subscription

Connection Error: This error can be caused by an inaccurate time on the system clock, or by temporary system unavailability

Activating & Registering your Autodesk Software Online

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SUPPORT

All subscribers have access to Basic Support. Advanced Support is available depending on the product and your contract. **Basic Support** includes 1:1 Web Support and expedited community forum support, access to helpful tutorials and other online product support. **Advanced Support** is a subscription add-on that includes Basic Support and Unlimited 24x5 1:1 priority phone support.

IMPORTANT

Access to web and phone support must be assigned to Users by their CM or SC. CMs and SCs have access to all available support by default.

WEB SUPPORT: Web Support access is granted at the time a User is assigned access to Products & Services, or at any time in the Manage Users area of Autodesk Account.

PHONE SUPPORT: Users who are granted permission to use phone support are called Named Callers. Learn about **phone support** and **Named Callers**

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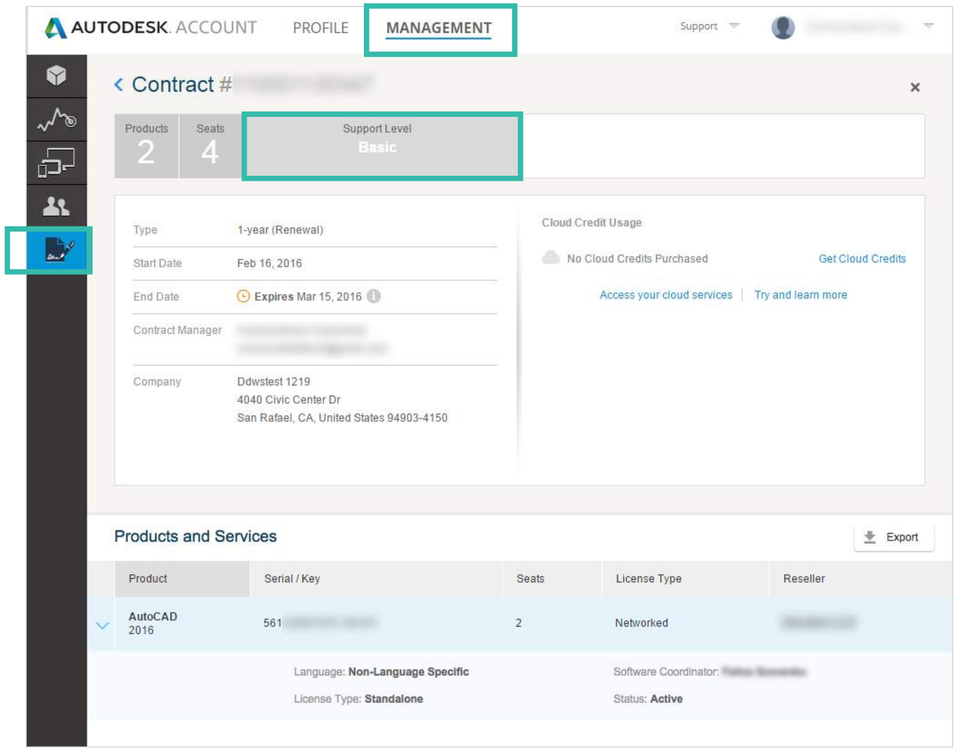
What Level of Support Do I Have?

If you are an Admin, but you are not sure what level of support you have, go to the subscription details (in **Management** > **Billing & Orders**). When you click on the associated contract, it will display the **support level** at the top with the number of products and seats on the contract, and support level by product in the details area.



More information:
[Technical Support Levels]
[Managing Technical Support for Subscription Products & Services]

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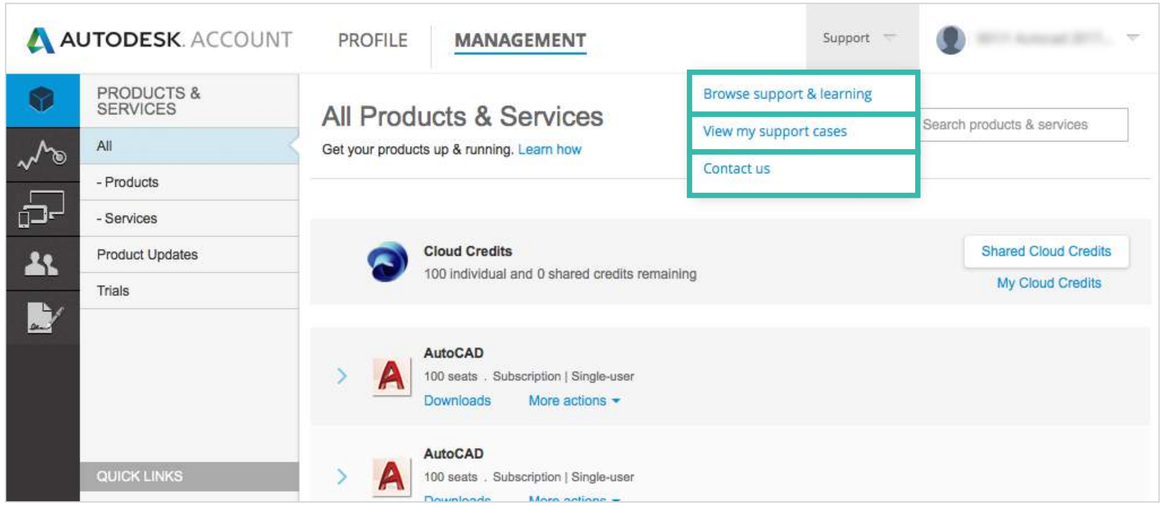
Accessing Support Options

NOTE: Access to web and phone support must be assigned to Users by their CM or SC.



BEST PRACTICE

Support the Autodesk Knowledge Network. The Autodesk Knowledge Network is actively managed and monitored by Autodesk support specialists. At the base of nearly every self-help and curated support article, in the **Browse Support & Learning** and **Contact us** sections, is the question "Was this Article Helpful?" We want to know. Please take a moment to provide us feedback, so we can better support your team's needs and the needs of others in the Autodesk community.

TO ACCESS SUPPORT, USE THE TOP DROP-DOWN MENU AND PICK FROM THE FOLLOWING THREE OPTIONS:

Browse Support & Learning – This offers access to self-help articles and information organized by products and cloud services on the Autodesk Knowledge Network (AKN), as well as access to community forums.

View my support cases – This is where you view and submit web support cases. If you are a Named Caller, you can also locate your technical support phone number(s) here.

Contact us – This launches a support page featuring top support solutions, curated weekly, enabling you to quickly resolve your issues. You can also post a question here. This area is constantly evolving and will continue to deliver more solutions.

IMPORTANT

Finding Your Technical Support Phone Number. If you are a Named Caller on an Advanced Support plan, you can find your support call-in number in the right-hand margin of the **View my support cases** page. See how to set up **Named Callers**

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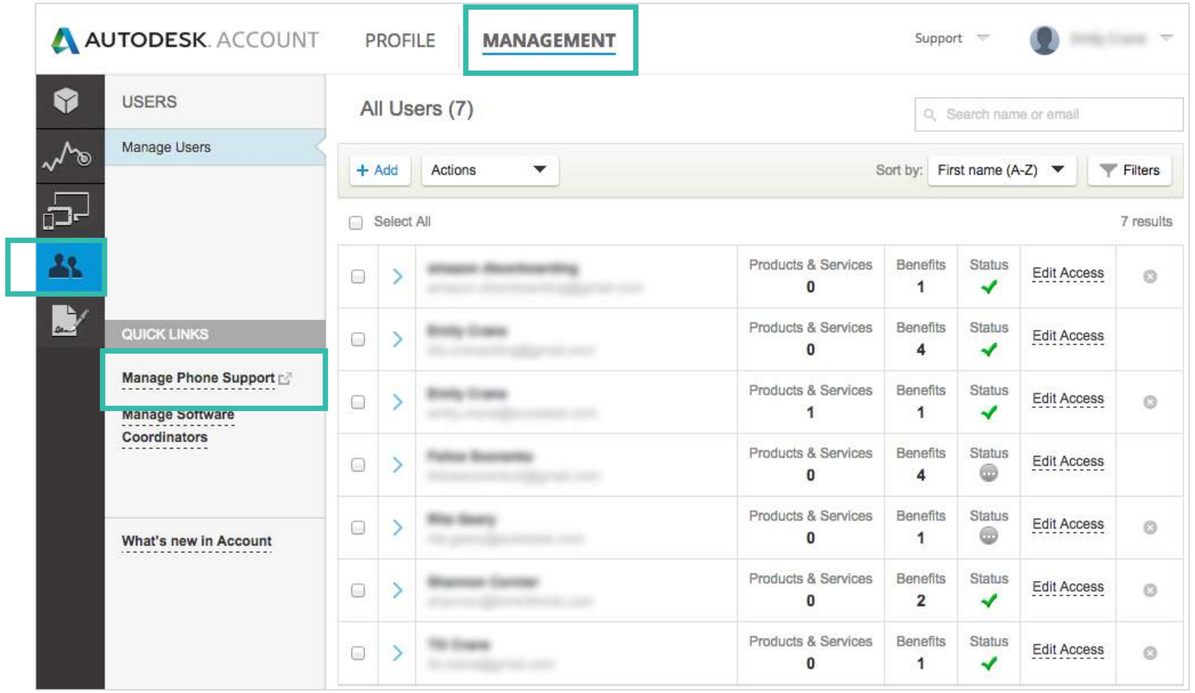
Phone support is offered to subscribers with Advanced Support. Contract Managers, Software Coordinators and Named Callers have access to 1:1 support with the Autodesk Product Support Team by toll free number.



TIME ALERT

Processing Time

It may take up to 24 hours for your Autodesk Account to show that Users have been assigned phone support benefits.

Set Up Named Callers for Advanced 1:1 Phone Support

If you have Advanced Support as part of your subscription, the Contract Manager and Software Coordinator will be Named Callers by default.

Other Named Callers must be set up by either the Contract Manager or the Software Coordinator **before** they will be able to access phone support. Named Callers MUST first be set up as Users before they can be uplifted to this role.

HOW TO SET UP A NAMED CALLER

1. Select **Management** in the top menu within Autodesk Account to view your Products & Services.
2. In the left navigation, click on **Users**.
3. Select **Manage Phone Support** in the Quick Links section.

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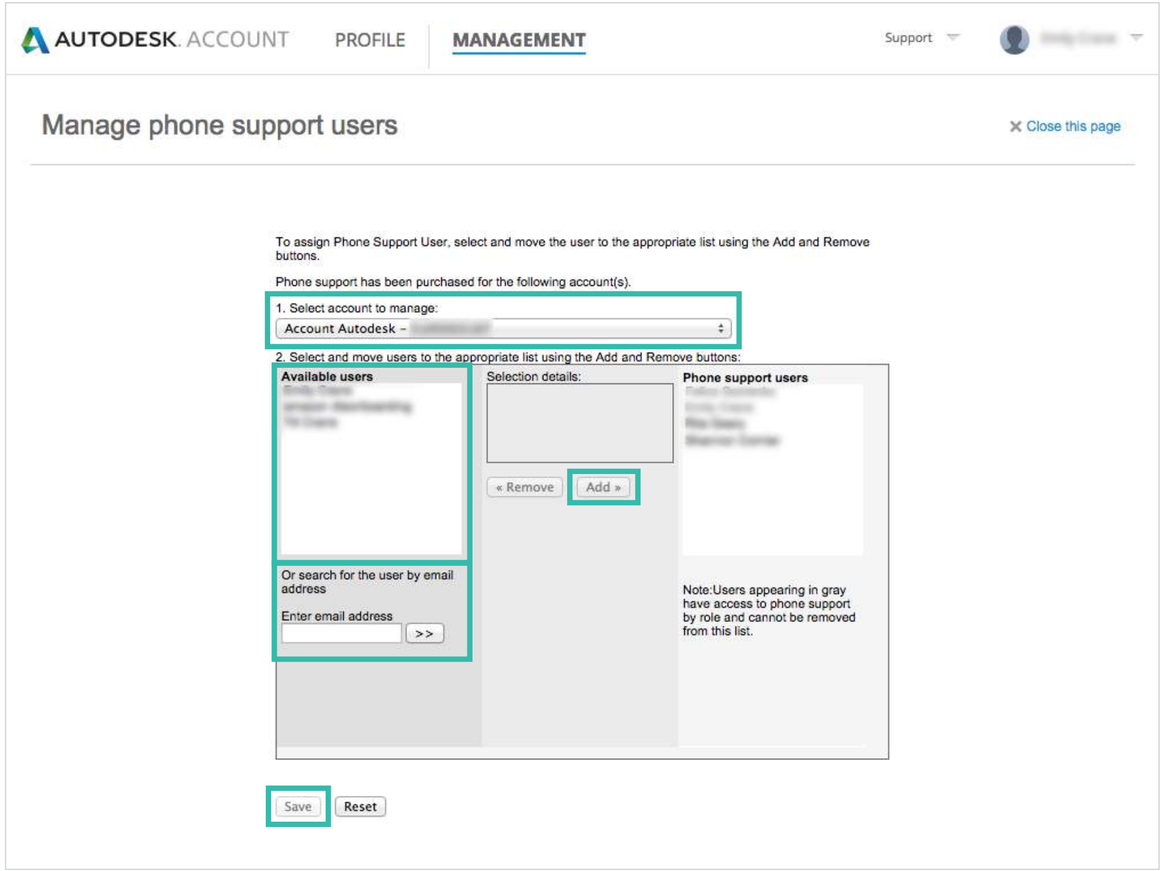

4. To add a Named Caller, select the **Account to manage** subscription number in the drop-down, then select the **Available user's name** and click **Add**.
5. If a user is not listed, you can **search** for them by their email address. **Be sure your user is already a Named User**. Learn how
6. Hit **Save** to lock in the updated phone support users list on the subscription.
7. Once this is done, you should receive a **"Phone Support Users have been updated successfully"** message. Users will also receive an email letting them know that their permissions have changed.

NOTE: It is best to also directly inform your Named Callers about the new Phone Support. While they will receive an email notification that their permissions have changed, it will not provide details around this new benefit.

BEST PRACTICE
Confirm your Named Callers. Contract Managers and Software Coordinators should check back on the Products & Services page to confirm that all Named Callers are properly assigned within 24 hours. If they are not, log a support case for fastest resolution.

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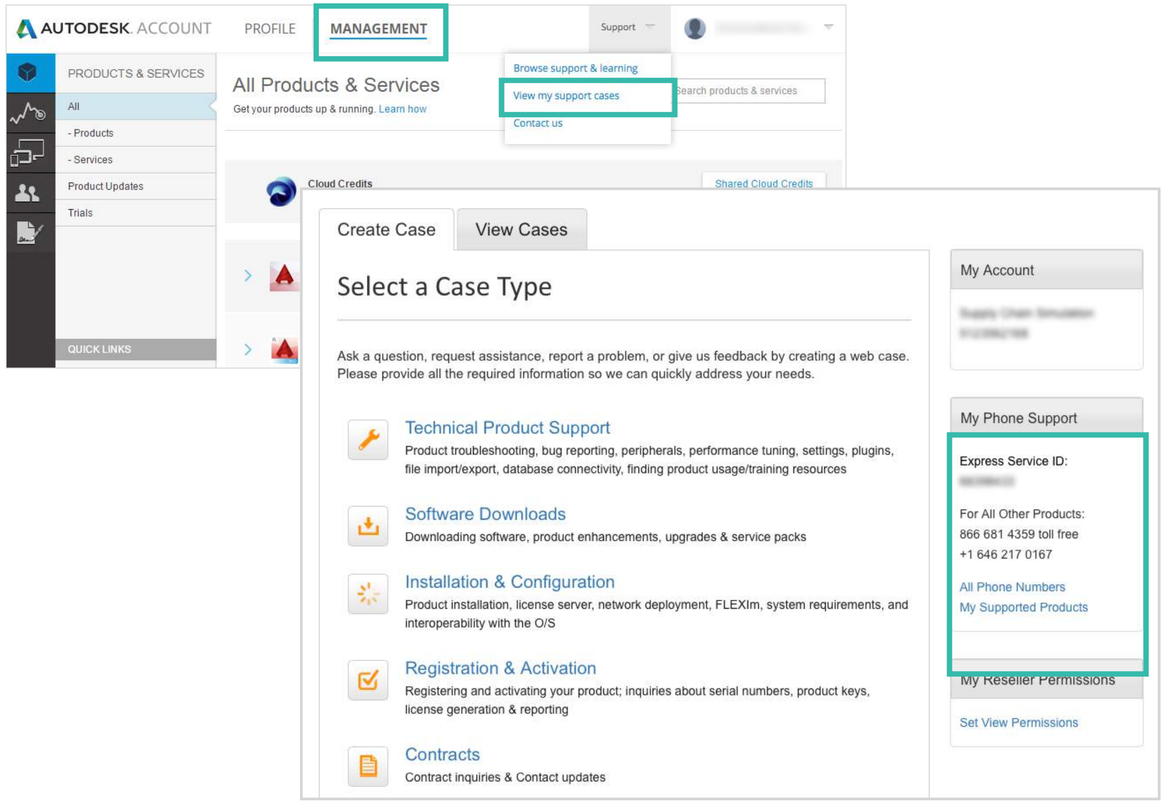
Find Your Phone Support Information

If you are a designated phone support user (e.g., Named Caller), you will need your support telephone number and your Express Service ID to contact support by telephone.



TO FIND PHONE SUPPORT INFORMATION IN AUTODESK ACCOUNT:

1. Select **Management** in the top menu within Autodesk Account to view your Products & Services.
2. Hover over Support on the menu at the top and select **"View my support cases"** from the menu options.
3. View your **live support phone numbers** and **Express Service ID** in the **My Phone Support** Section, which you will find on the Create Case tab. If you have products or services with specific support lines, you will see multiple phone numbers listed, including the default number for all products.

NOTE: This information only appears for subscribers with phone support benefits.

More information:
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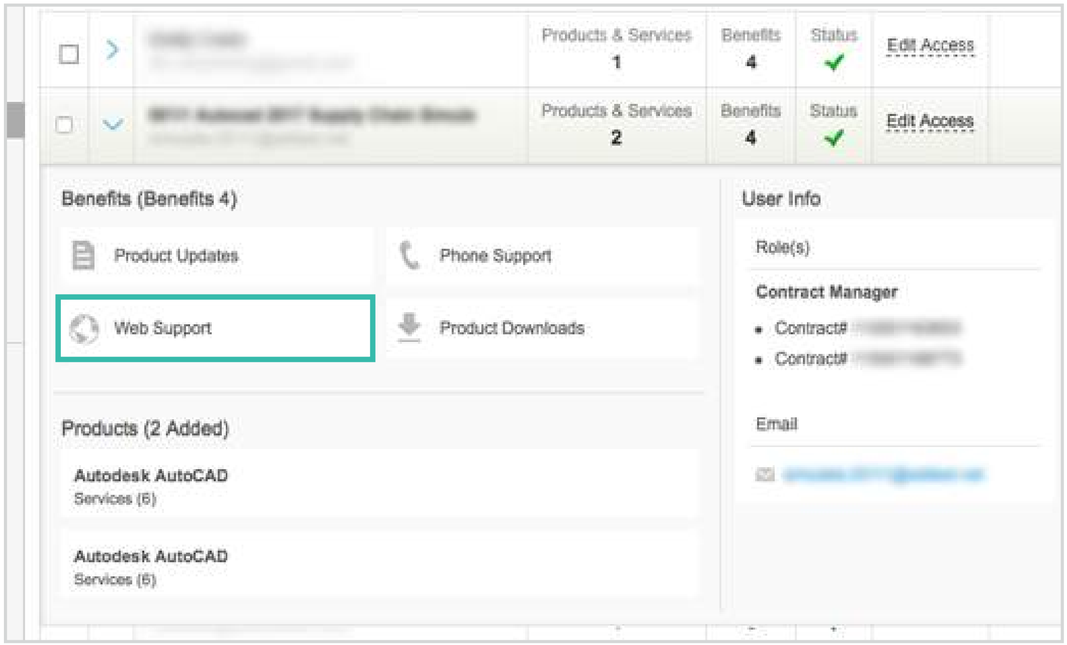
Web Support

All subscribers get Basic Support, which includes 1:1 Web Support where Users can open support requests and track cases through Autodesk Account. **Web Support** benefit details are listed by User within the Admin's user management area.



IMPORTANT
Be sure ALL Users have Web Support access. If users were not granted Web Support access when products and services were assigned, be sure to select Edit Access on the user row to assign the inherent subscription benefit.

NOTE: When a User is assigned Web Support, the User will get support for all products and services on the whole contract.

NOTE: Users will get a "your permissions have changed" email. Be proactive by letting your Users know what permissions you've granted.

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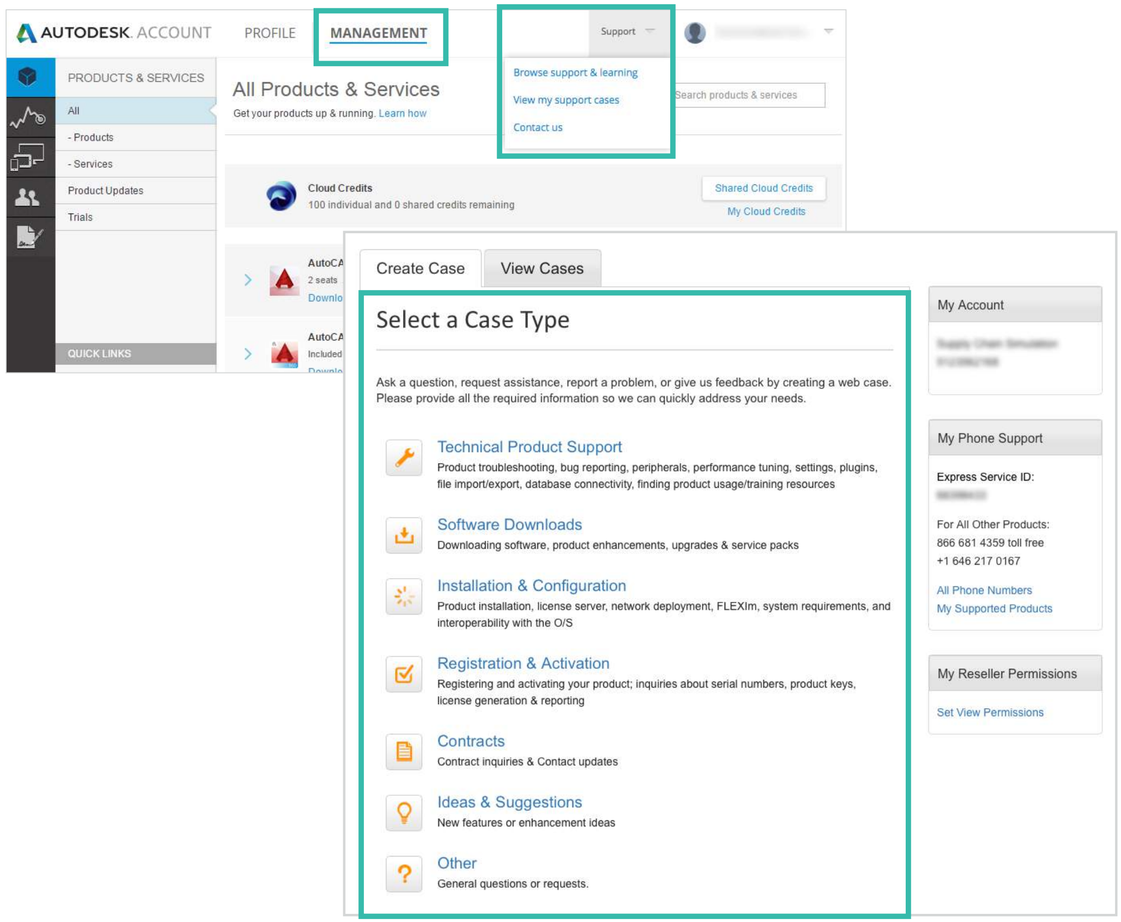

CREATE A SUPPORT CASE

1. Select **Management** in the top menu within Autodesk Account to view your Products & Services.
2. Hover over Support on the menu at the top and select **"View my support cases"** from the menu options.
3. Select the **Case Type/Support Topic** that best describes your issue.

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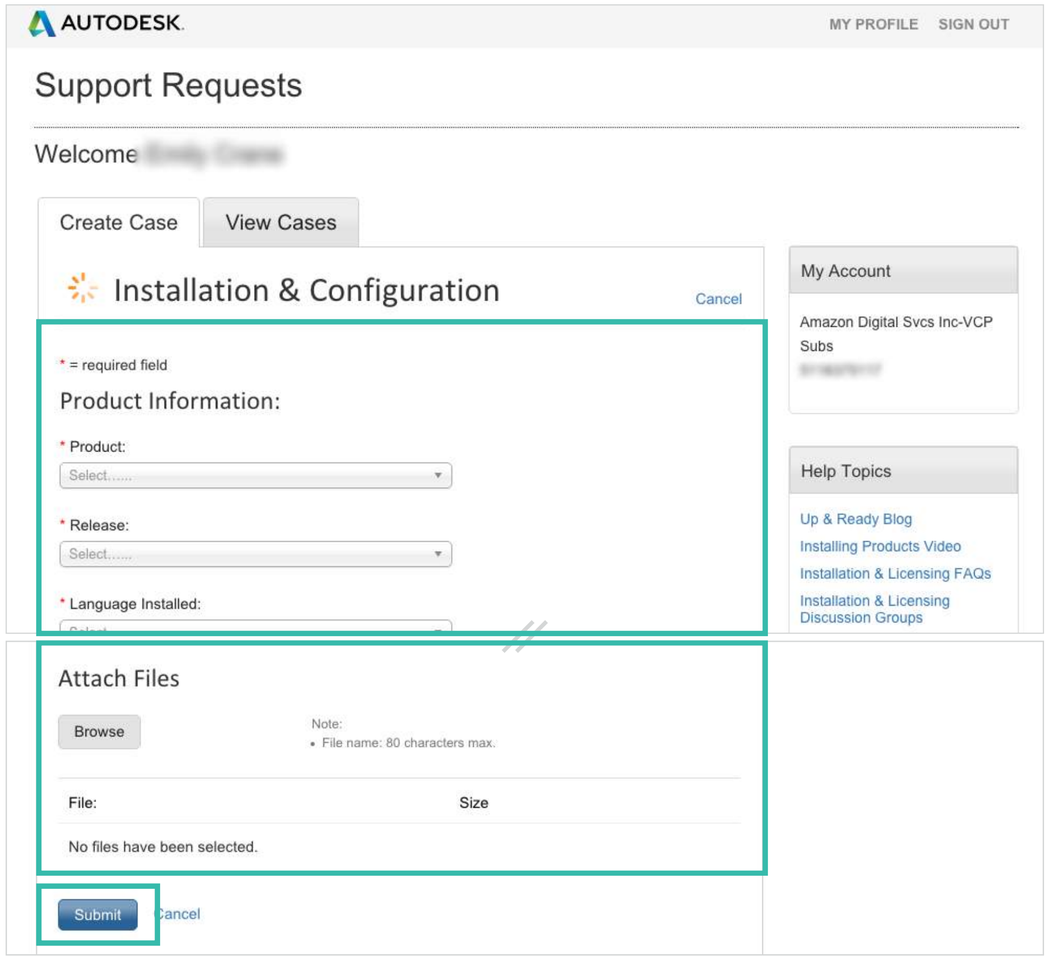

4. Fill in the **required information** (marked with the *).

NOTE: This information will vary depending on the chosen topic. Please provide as much information as you can so that we can provide the best possible support.

5. **Attach any files** such as screen shots or log files that may help the support specialist by clicking the Browse button. Click the **Submit button** when your request is complete.

BEST PRACTICE

Support Users can create a default to eliminate the need to enter this information for each case. If there is a product for which you ask the most questions, create that as a default by checking off "Make these selections my default."

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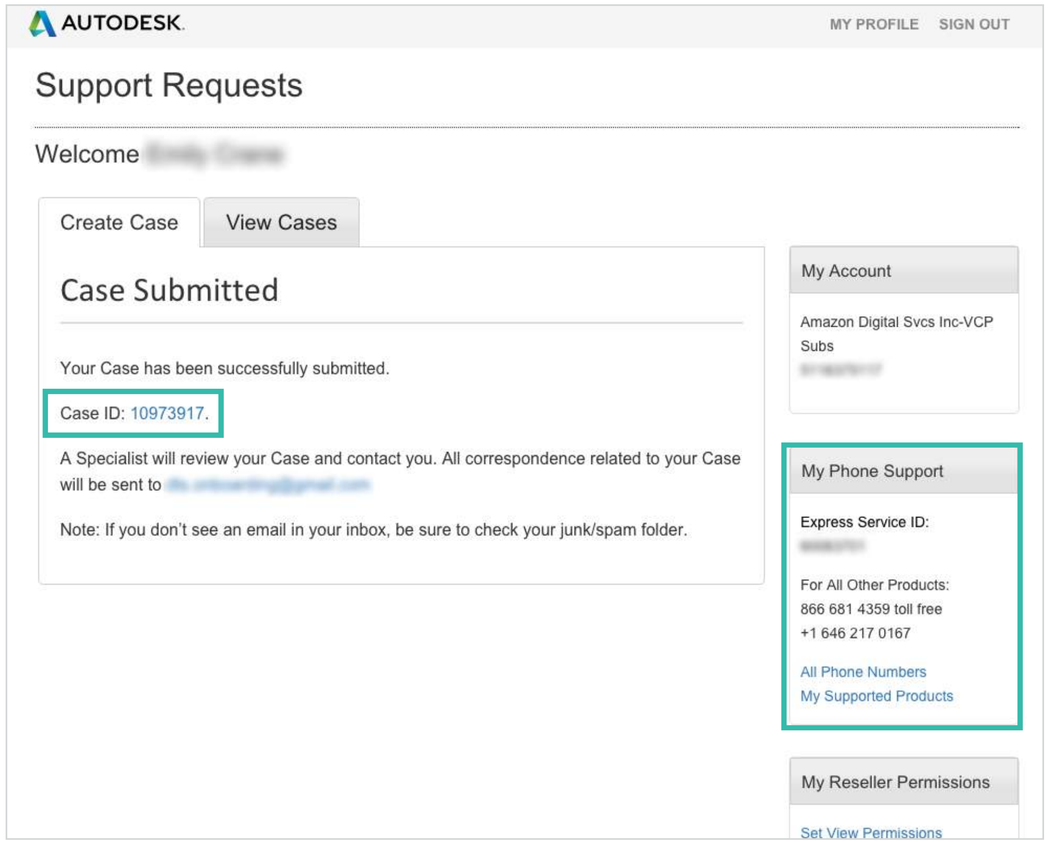

6. The case will immediately receive a **case ID** and an Autodesk Specialist will review the support case.

   While the submitter may receive email correspondence, everyone on the contract can see all logged cases at any time, making the support solutions accessible for all, regardless of who submitted the case.

NOTE: If you have **phone support** as part of your product or Advanced Support benefits, you should also see phone support contact numbers in the right margin of this same page.

BEST PRACTICE

Keep information current and users aware. Contract Managers and Software Coordinators should always be sure their Autodesk Account profile, contact information and email address are kept up to date and that users know who the Contract Manager and Software Coordinator are for their products.

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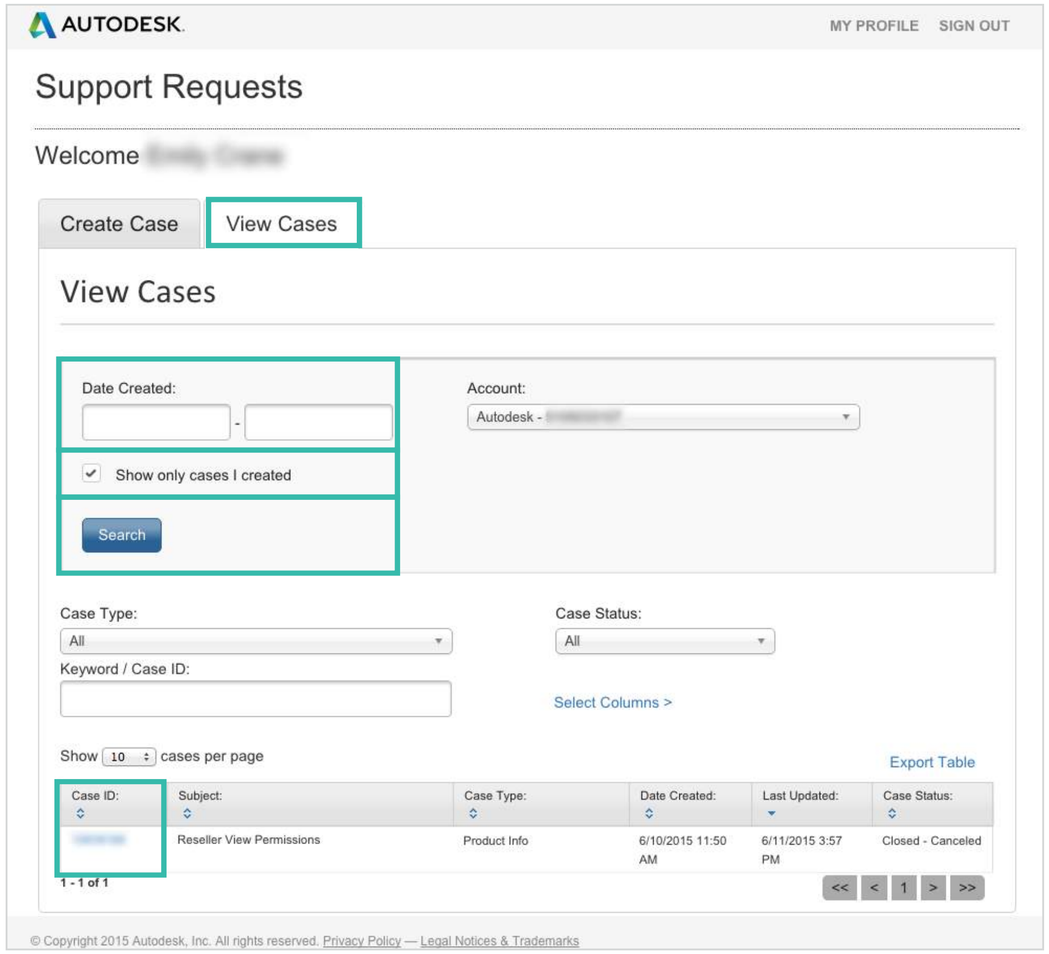
Web Support



VIEW A SUPPORT CASE

1. Select the **View Cases** tab on the Customer Service & Support screen. (This is the same area the case was created in your Autodesk Account Management page Support menu › View my support cases.)
2. **Search using the date** you submitted the request, a keyword, or the Case ID. Case information is contained in the confirmation email you receive after submitting a request.
3. **View all cases or only the cases you created by checking the box.** This sort view is a helpful feature that allows users to filter quickly and learn from other successfully resolved cases.
4. Click **Search** to see the results below.
5. Click on the **Case ID number** to view case details.

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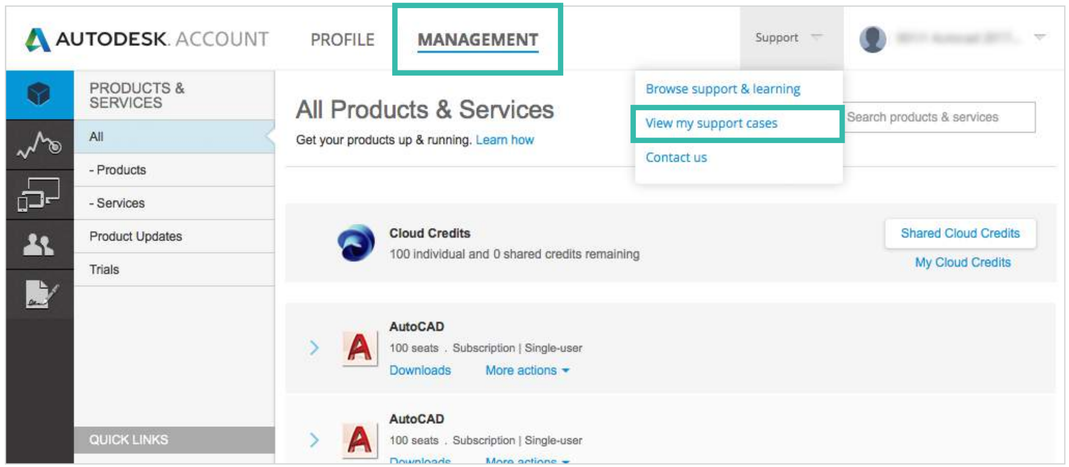
Set Up Reseller Permissions for Additional Support

By default, resellers are not able to view associated cases with subscription contracts.

However, as the Contract Manager or Software Coordinator on a subscription contract, you can change this default access. This allows your Reseller to have read-only access to your company's support requests or cases (connected to the contracts you have with them) and helps them provide additional solutions or training for your users.



BEST PRACTICE

Set Up Resellers. Contract Managers and Software Coordinators should give resellers permission to view their support cases so (1) the reseller is made aware of such cases and (2) they can help you get problems resolved quickly so your users can get back to work.

It's also an opportunity for the reseller to learn how to troubleshoot the problem if it comes up in the future. **Be sure to let your reseller know you've chosen for them to see your cases so they can best support you.**

TO SET YOUR RESELLER VIEWING PERMISSIONS:

1. Select **Management** to view your Products & Services in your Autodesk Account.
2. Hover over Support on the menu at the top and select **"View my support cases"** from the menu options.

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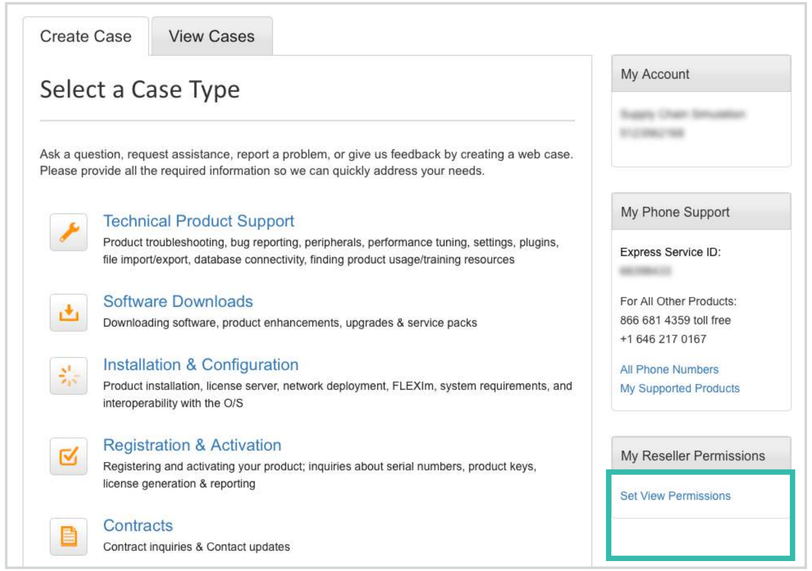
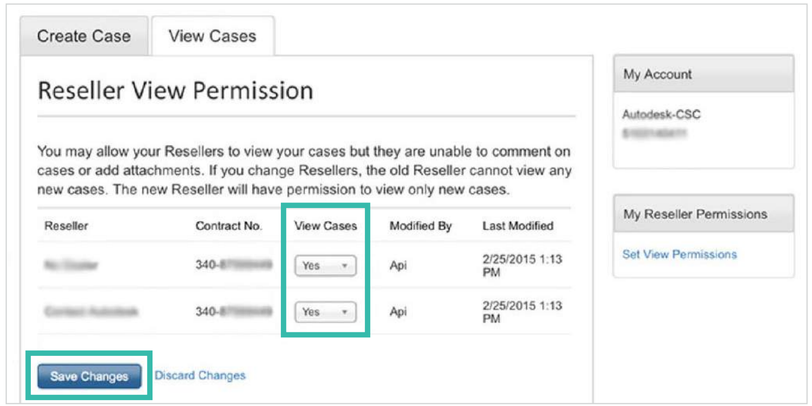
Set Up Reseller Permissions for Additional Support





3. Click the **Set View Permissions** link in the My Reseller Permissions box.
4. Locate the contract and reseller and select the desired option in the **View Cases** column. In most cases, this will mean changing the default "No" to "Yes."
5. When finished, click the **Save Changes** button.

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ONGOING MANAGEMENT

Proactive management of your subscription means fewer delays and downtime for your team. In addition to familiarizing yourself with this section, we suggest you review our list of **Best Practices** for managing your subscription at the beginning of this eBook.

The following pages describe how to manage your contracts, keep tabs on Cloud Service usage, renew promptly and more. Let's first take a look at how to manage contracts and orders.

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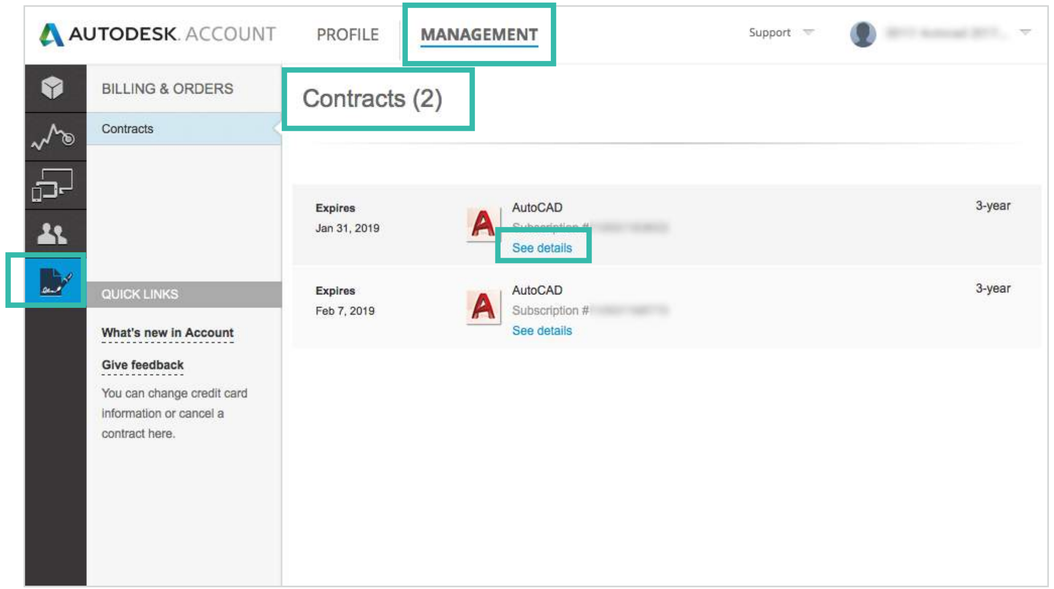
Managing Billing & Orders

Contract Managers and Software Coordinators can easily view contract and order details in Autodesk Account.



Take a quick look when you sign in to ensure that subscription details match the expected order.

1. Select **Management** in the top menu within your Autodesk Account to view your Products & Services.
2. In the left navigation, click on **Billing & Orders**.

NOTE: You can also get here from within an expanded product "drawer" on the Products & Services page.

3. Here you see a master list of all your **contracts,** including expiration date, etc.
4. Click on **"See details"** to display the contract details.

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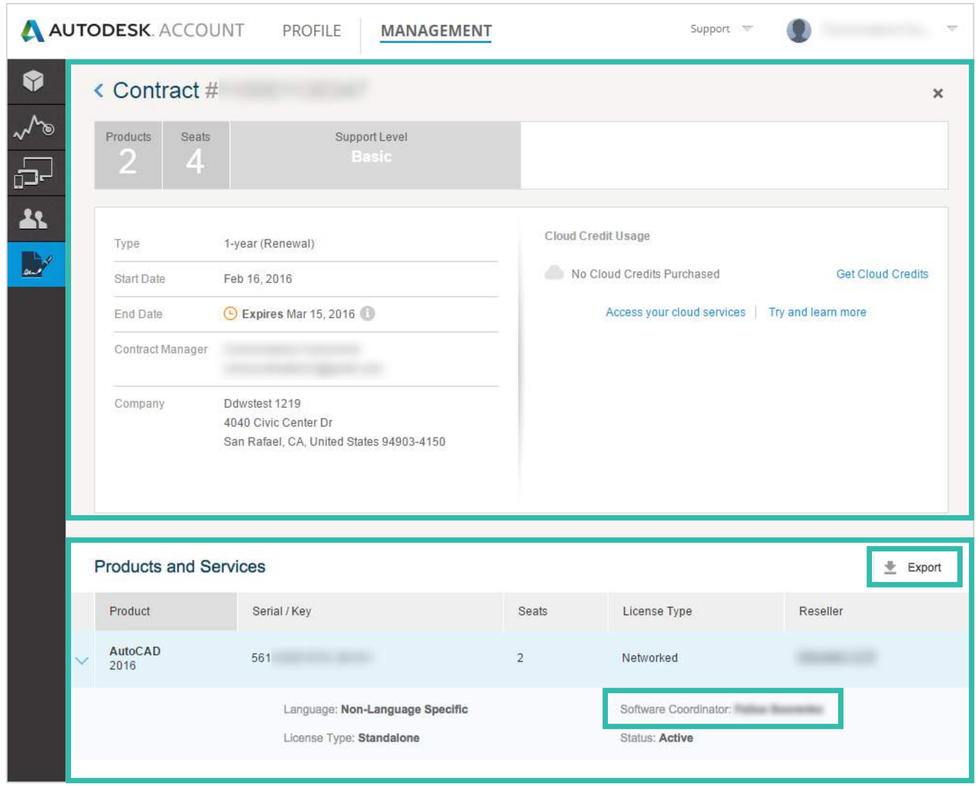
Managing Billing & Orders



5. The **Contract Details screen** will contain all critical contract information, including products, number of seats, support level (basic or advanced), start and end dates, and Contract Manager information.

   You can even get more cloud credits from here if needed.

6. Lower in the screen are all the associated **product and service** details for the contract, including reseller details, serial numbers and product keys.

   This is also where the assigned **Software Coordinator's name** can be found.

7. You can also click the **Export** button to create a comma delimited CSV file.

More information:
See the **How to Renew** section for how to update your renewal terms or payment method.

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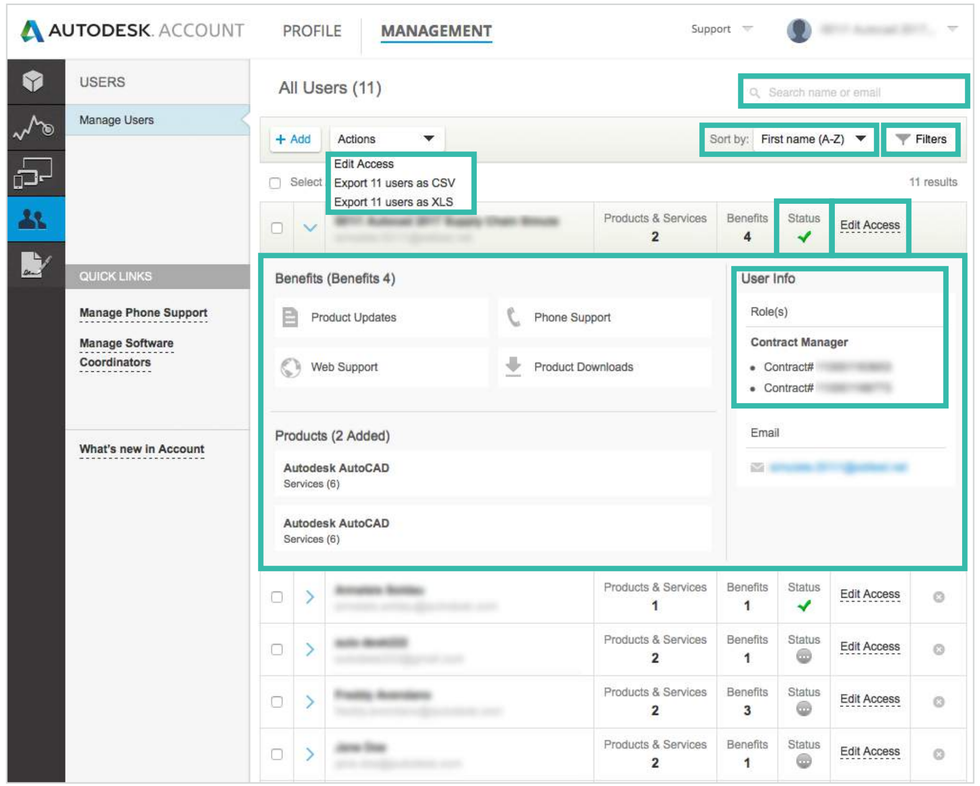
User Management

You can continue to manage all user information within the **Manage Users** page of your Autodesk Account.



Search, sort, bulk select, and advanced filter features are great tools for busy Admins. Here you can:

a. **Sort by name**
b. Check **user info** and **status**
c. **Search for users** by name or email
d. Access user **product and benefit information**
e. **Edit access permissions** for individual users or multiple users selected at once
f. **Filter all user information** with advanced multiple select categories. Filter users by product(s), service(s), benefit(s), contract(s), status (pending or accepted) and role
g. **Export** user information as CSV and XLS files

BEST PRACTICE
Establish protocols. We recommend that Contract Managers and Software Coordinators establish internal protocols and processes around requests to change roles and users, including removing users that are no longer affiliated with the company.

More information:

User Management Video Tutorial

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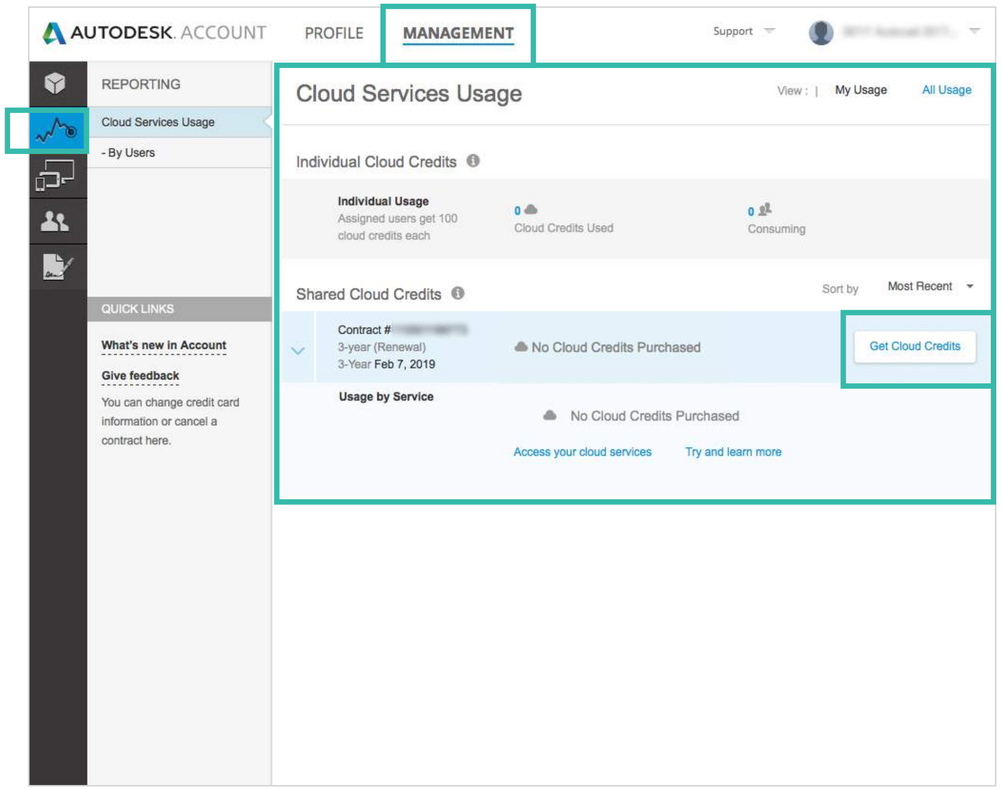
Administrative Reports

All users have access to some level of reporting within their Autodesk Account. Simply go to **Management** in the top menu and click on the **Reporting** link in the left navigation menu.



At this time, reporting covers primarily **Cloud Service usage**. We will continue to integrate more reporting functionality into Autodesk Account over time.

Users can see their individual cloud credit usage. It's the 100 allotted cloud credits that every user receives.

Admins can see their own individual cloud credit usage as well as the shared cloud credits. Shared cloud credits are the credits purchased by the company and connected to a contract.

Admins can also see cloud credits by user so you can assign additional credits appropriately.

NOTE: You can initiate getting more **cloud credits** within the Reporting screen.

More information:
Cloud Credits FAQ

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How to Renew Your Subscription from Autodesk Account

Subscriptions can be renewed as early as 90 days prior to expiration. To avoid potentially losing access to your software, services, or subscription benefits, it is important to renew your subscription contract before the expiration date.

If not renewed, notifications are emailed to Contract Managers 45, 30, and 4 days prior to expiration.

SUBSCRIBED THROUGH THE ONLINE STORE

You do not need to take any action. If you have a **monthly** or **annual** subscription through the Online Store, your subscription will renew automatically. Your credit card will be charged each month or year per the automatic renewal agreement you accept on the Online Store, and a confirmation will be sent to you after each renewal.

SUBSCRIBED THROUGH A RESELLER

The renewal process for **quarterly, annual,** and **multi-year** subscriptions through Autodesk Resellers is unique to each Reseller. Access your Autodesk Account to find Reseller information and how to best contact them.

IMPORTANT

Keep your team working productively – renew ON TIME. To avoid losing access to your product and incurring potential late fees, renew your subscription contract **BEFORE** the expiration date. Also be sure to keep the associated credit card information up to date.

These small steps will help you avoid frustrating downtime down the road.

More information:
Renewing Your Subscription from Autodesk Account

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FAQ

Find answers to common questions about subscription setup, installation and maintenance. For additional information, look for links to related sections within this guide and articles on the Autodesk Knowledge Network (AKN).

- Who is the Contract Manager and how can I tell?
- How can I change the Contract Manager?
- How can I set up a Software Coordinator?
- Who will be assigned as a User by default?
- What is the difference between a User and a Named User?
- When do you need a Serial Number?
- Where can I find Serial Numbers and Product Keys in Autodesk Account?
- Who can call technical support?
- How can I update Billing Information for my subscription?
- When I click "Edit Renewal" in Subscription Details, it asks for my order number and password. Where can I find that information?
- What should I do if I see a firewall blocking message asking if I want to allow and install Akamai NetSession?

Q: Who is the Contract Manager and how can I tell?

CONTRACT MANAGER (CM)

A: You are automatically the Contract Manager if you subscribed and registered your software and/or services to your unique User ID. If you are an Admin (CM or SC), you can verify the name of your Contract Manager within Autodesk Account in the Contracts & Orders area.
Learn more about this role

You can also see each user's roles in the Manage Users interface by toggling the arrow next to a user's name to reveal more details.

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Several **"More Information"** links have been integrated throughout the sections of this guide to support deeper learning in the associated areas.

To further enrich your knowledge of Autodesk software and services, we encourage you to take full advantage of the integrated support for self-help and self-paced learning opportunities through the Autodesk Knowledge Network (AKN).

The following links will help get you started:

USER ID/ACCOUNT INFORMATION

Overview

FAQ and Video Tour

USER MANAGEMENT INFORMATION

Overview

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Managing Your Subscription Contracts

Support: Managing Technical Support for Subscription Products & Services

Update Billing Information for Your Subscription

Still have questions about your subscription?

Please contact your reseller or Autodesk.

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