Milestone Systems

Quick guide: Register software license codes on Milestone Customer Dashboard

Milestone Customer Dashboard

milestone
The open platform company

Introduction to this guide

This quick guide introduces Milestone partners how to perform the following processes on Milestone Customer Dashboard:

- Register software license codes (SLCs) for your customer installations
- Define Milestone Customer Dashboard users and assign roles to them so they can register SLCs too and perform other actions on Milestone Customer Dashboard
- Work with license groups

For more information about license activation, refer to the activating licenses quick guide for your VMS system that you received with the software license file. You can also find these quick guides on the download page on the Milestone website (http://www.milestonesys.com/support/manuals-and-guides/).

Milestone Customer Dashboard

Milestone Customer Dashboard is an online service for Milestone partners. The online service has tools for managing information about your customer installations as well as registration and activation of licenses. There are also various features that help you to provide high-quality customer service.

For example, you can:

- Look up information about customers, licenses and Milestone Care subscriptions
- Group licenses for maintenance of several licenses at once
- Upgrade software licenses online to the latest version covered by the licenses' Milestone Care subscriptions
- Monitor the system health of customer installations and create system uptime reports to analyze and document the performance
- Set up filters and email notification profiles for errors on your customers' installations

For more information about the Milestone partner features, log in to the Milestone Learning Portal (https://go.bluevolt.com/Milestone/Home/) and find the eLearning course **Configuring and Using the Customer Dashboard**.

Access to Milestone Customer Dashboard

If your company has a My Milestone account and your My Milestone administrator has defined you as a user with the role License User or License Admin, you can log in to Milestone Customer Dashboard with your My Milestone credentials from any computer with an Internet connection either through My Milestone or directly on Milestone Customer Dashboard (http://online.milestonesys.com).

If your company does not have a My Milestone account and you are going to be the administrator of the account, you can create one from the Milestone website (http://www.milestonesys.com).

Look up customer and license information

Milestone Customer Dashboard makes it easy to find and work with information about customer installations. The information is grouped on two tabs.

Tab	Description
Customers	View a list of all customers and basic information about them. Select a customer and click available buttons and links to see additional information about each customer.
Licenses	View a list of all licenses and basic information about them. The basic information includes the number of hardware devices that are activated for each license, the level of Milestone Care subscription, and the number of the servers where the license is applied. Select a license and click available buttons and links to see additional information about the license.

Giving users access to Milestone Customer Dashboard

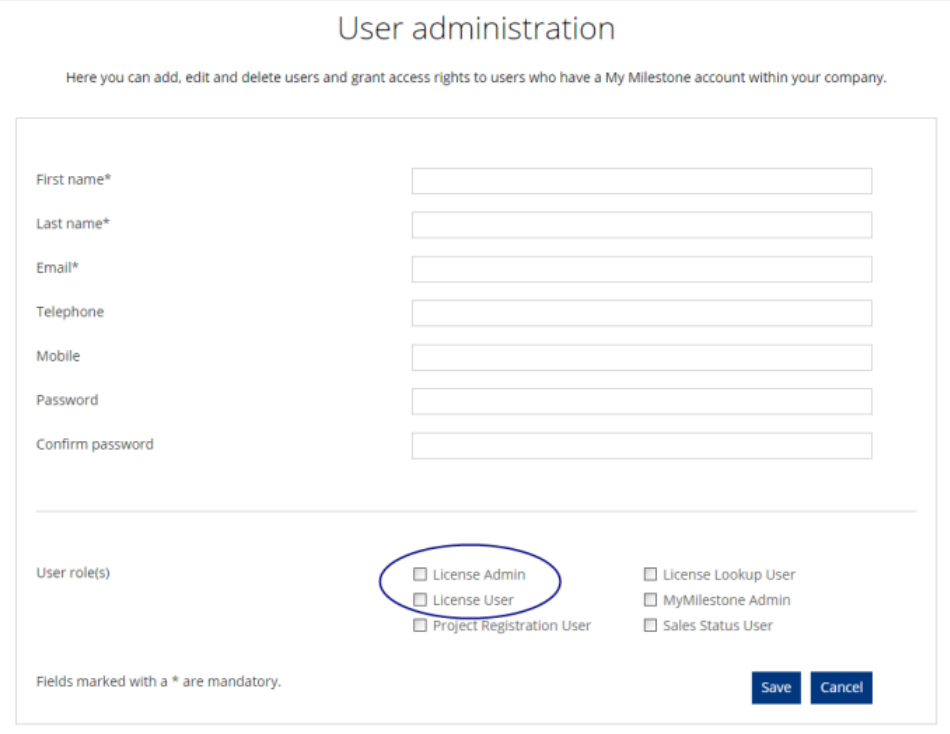
If you are an administrator of your company's My Milestone account, you can use the **User Administration** page on My Milestone to define Milestone Customer Dashboard users and their access permissions. You can also remove users or restrict their access, for example, when a person leaves your company. All users have their own login credentials and connect to your company account.

There are two roles that define your users' access permissions for tasks related to software licenses:

- **License Admin** - Manage all software license information for all customers
- **License User** - Manage software licenses that you have permission to access in order to:
  - Upload license request files when you need to activate device licenses for a customer
  - Download software license files and receive activated license files by email, for example, to update a customer installation
  - Subscribe to Milestone Care reminders, which can alert you when a Milestone Care subscription needs to be renewed

Define a Milestone Customer Dashboard user

1. Log in to My Milestone. In the upper-right corner, click your user name, select **My Milestone**, and then click **My Users**.



2. Enter the user's contact information, select the appropriate user role, and then click **Save**.

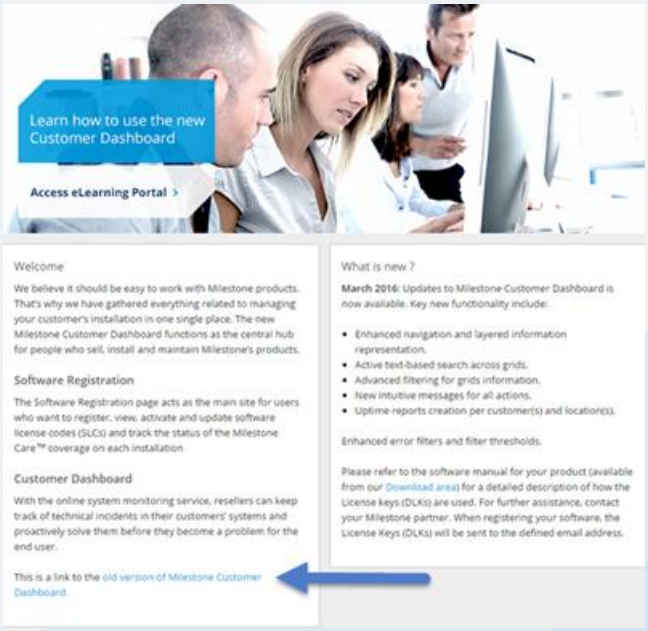
   If you do not have administrator rights in My Milestone, but you believe you should, contact the administrator of your company's My Milestone account.

Give access to specific software licenses

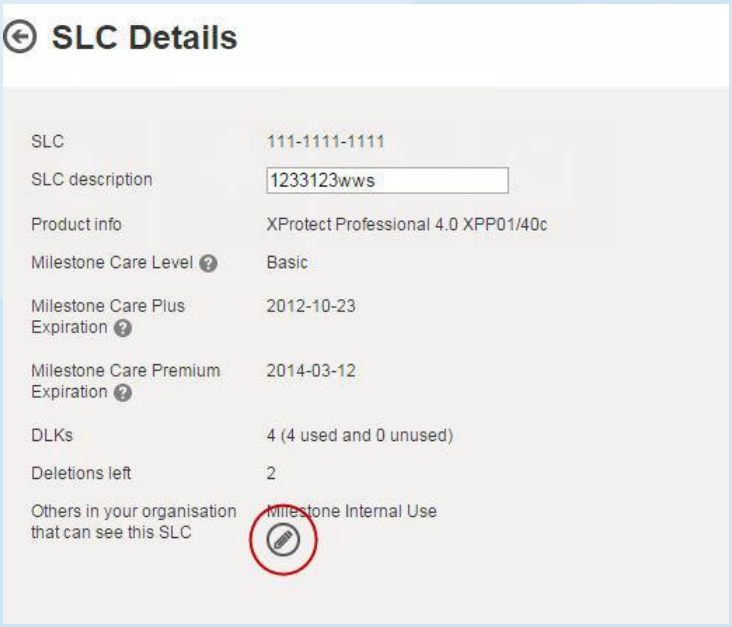
If you have the License Admin role, you can specify the software licenses that a user can access. This can be all licenses for all customers, or only specific licenses. For example, only licenses for the customers that the user works with.

3. Log in to Milestone Customer Dashboard.

4. In the Customer Dashboard section at the bottom of the landing page, click the link, and then log in.



5. On the **Software Registration** tab, in the list of software licenses, click the license to view details about it.

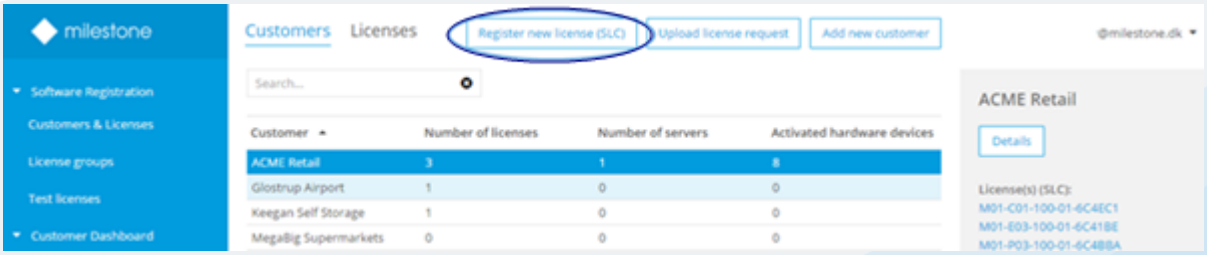


6. Click the icon next to **Others in your organization that can see this SLC**.
7. In the **SLC visibility** list, find the user, and then select the **SLC is visible to** check box.

Register a SLC

1. Log in to Milestone Customer Dashboard.

2. Click **Customers & Licenses**, and then click **Register new license (SLC)**.



3. In the **Register new software license** dialog box, enter the SLC and select the customer if the customer already has other licenses. If not, add a new customer.
4. Optional: Enter additional information about the license.
5. Optional: Assign the SLC to an existing license group. See below for how to create a license group.
6. Click **Save**.

License groups

By assigning licenses to license groups, you can efficiently manage several licenses at once instead of only one license at a time. For instance, you can filter licenses based on their license group and create notification profiles for a license group. A license can belong to several license groups, for instance based on VMS product, customer, internal contact and other criteria.

Create a license group

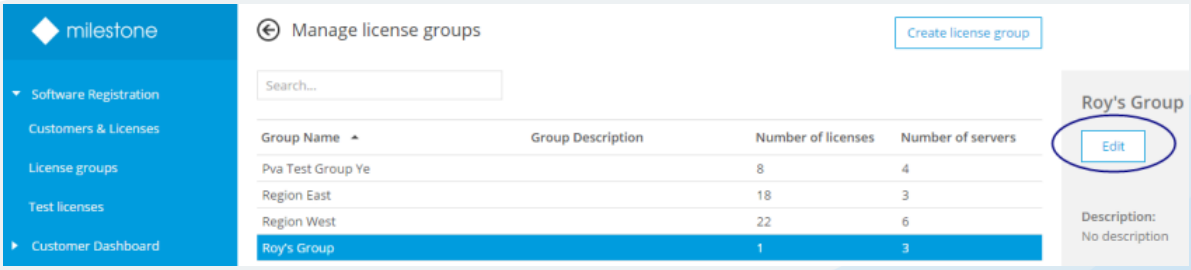
1. Log in to Milestone Customer Dashboard and click **License groups**.
2. Click **Create license group**.

3. In the **Create license group** dialog box, enter a name for the group.
4. If you want to, enter a description of the group.
5. Select the licenses to be included in the group. You can search and filter for licenses.
6. Click **Create**.

Edit or delete a license group

1. Log in to Milestone Customer Dashboard and click **License groups**.

2. Select an existing license group and click **Edit**.



3. In the **Edit license group** dialog box, you can edit the name and description of the license group and add additional licenses to the group or remove licenses from the group. Click **Save** to save your changes.

4. If you want to delete the license group, click **Delete**.

About Milestone Systems

Milestone Systems is a leading provider of open platform video management software; technology that helps the world see how to ensure safety, protect assets and increase business efficiency. Milestone enables an open platform community that drives collaboration and innovation in the development and use of network video technology, with reliable and scalable solutions that are proven in more than 150,000 sites worldwide. Founded in 1998, Milestone is a stand-alone company in the Canon Group. For more information, visit: http://www.milestonesys.com.