

Implementations - Manitou License Update Process for Manitou 1.6.1 and Up

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Introduction

The intended purpose of this document is to define the process for updating and/or issuing licenses to Manitou systems. This document will also define the process for recording discrepancies between licensing resources.

Licensing Tracking Resources

In most cases when a customer account requires a licensing action Implementations or Support will hand the licensing or re-licensing. Technicians have 3 resources for locating licensing specific information. At this time these 3 systems all track information separately and without automation.

Licensing Spreadsheet Online

This sheet was designed to monitor Customer Accounts and their Expiration Dates. The following customer fields are tracked on these sheets: Account Number, Account Name, Expiration Date, Accounting Status, Discrepancies, and Customer Billing Notes.

⚠ CRM RELATED PORTIONS OF THIS DOC WILL NEED TO BE IGNORED/MODIFIED AFTER SALESFORCE MIGRATION

CRM

The Customer Relationship Management System houses and tracks all customer-specific data for support cases, sales leads, implementation projects, and general customer information. Concerning licensing, CRM Tracks the following customer fields: Account Number, Account Name, Number of Customer Licenses, Number of Users, etc...

License Master Server

The License Master server is where all license updates and requests are fulfilled. This server is the master for all active licenses for Manitou Systems 1.6.1 and higher. This system tracks the following fields: Central Station ID(Account Number), Account Name, and ALL Product Licensing Values.

Use Cases

Most Bold licenses issued or renewed are set to 185 day periods to coincide with the customers billing cycle. It is important to know for what purpose you are generating or updating a license, as this will drive the workflow. There are

generally 4 use cases of license actions.

Renewal without Modification

- The customer license needs to be updated as they were notified that it will be expiring soon. The only field to be adjusted on their license request is to update the expiration date. Standard practice is to extend the license for 185 days unless otherwise specified.

Modification

- The customer has requested a change to the number of accounts or services that are active on their account. If a license is set to expire within 30 days, verify the expiration date with the licensing spreadsheet to determine if the license can be extended without escalation.

Issuance during Re-installation

- There is an existing customer that has purchased new hardware and requires re-installation on-to the new hardware. Re-installation licenses will be set to match the previous installation with an expiration date of 185 days in the future unless otherwise specified.

Issuance for New Installation

- When a new customer purchases Manitou and needs a start to finish installation. The specific licensing requirements should be provided in the sales order or recorded in CRM. When provisioning a new license the expiration should be set to 185 days in the future unless otherwise specified.

Licensing Process

RDP into License Master Server & Software

The Bold License Master Software runs on the server named LICENSEMASTER.boldgroup.com. Access to this server is restricted to personnel who are permitted to issue and modify Bold Licenses. If you feel it is necessary to have access to this server, please escalate to your superior. Once connected to the License Master server, a daily password is required for access to the Bold License Master software. Once launched, do not change any email settings, select OK.

Importing a Customer License Request

Once a license file is generated from the customer's license client, it is necessary to import it into the License Software. After transporting the folder with licenses to be imported onto the LICENSEMASTER server and launching the License Master Software, follow the steps below to update the license file(s).

1. Under the File menu, select Import License Action
2. Select a file location from which to import the license file by selecting the ellipses ...

3. Navigate to where you stored the file with the customer licenses, select the first license file and click OK.
4. Once the file has been imported, locate and select the Customer Account in the Navigation pane on the left.
5. The license file that was imported should now appear as a yellow entry under the License Action Tab.
 - NOTE: If the license action that was just imported is not listed under the License Actions tab for the selected customer, it may be necessary to check other similarly named accounts to locate the appropriate customer account. Note any differences, these will be recorded as a discrepancy.
6. Right-click the License Action and select Create License Key.
7. After the license file opens, the license can be modified and updated as needed.
8. Once the changes have been made and you have verified them, select the Save To File radio button, near the bottom then select the ellipses... for File Name.
9. Save the File into a folder, renaming the file to the original name with FIN or UPD as a prefix, then select Save.
 - Example: FINmanitou-real-1.blc UPDPracticeServer01.blc FINManitou01.blc
10. Select OK to generate the License File, select YES to confirm.
11. Repeat the same steps with any other license files for the same customer with the same intended update.
12. After all license files have been generated, transfer them off of the LICENSEMASTER and send them to the appropriate entity that needed a license key.
13. Exit the License Master Software, and Log Off the LICENSEMASTER Server.

For additional Insight into License Fields, Visit the [Licensing Notes Doc](#)

▲ DISCREPANCY PROCESS NOT PRESENTLY ADOPTED. REVISIT PROCESS AFTER SALESFORCE MIGRATION

Discrepancy Identification and Logging

When working with customer licenses and tracking information between 3 data sets, licensed quantities and features should be monitored for discrepancies. To correct the licensing data, a systematic process must be established to identify, correct, and log licensing discrepancies. All customer licenses are updated every 185 days, which presents 2 opportunities per year to record and correct discrepancies.

Annually Adjusted Fields to Monitor

Monitoring all fields of a customer license between CRM and License Master can be extremely time consuming and adversely affect the time it takes to complete a License Action. For this reason, the number of fields monitored for discrepancies will be limited and rotate annually. This will allow technicians to identify and log discrepancies efficiently as they complete licensing requests while gradually auditing all active customer licenses.

Currently Monitored Fields

The fields being monitored for discrepancies will change annually to encompass more fields in the customer record. For the initial phase of this process, only the following 3 fields will be Monitored for Discrepancies.

- Central Station ID/Account Number - CRM, Licensing Sheet, & License Master
 - This should be a 3 to 6 digit code named Account Number the Licensing Sheet and CRM. In License Master this is recorded as the Central Station ID. Any differences between these will be noted in the Discrepancy Logging Sheet.
 - Log with the Account Name/Number Discrepancy Type.
 - Example: Central Station ID in License master is 708025, CRM Account number is 724, Tracking Sheet is 708025.

- License Quantity: Customer Accounts - CRM, License Master
 - CRM and License Master both have the total number of customer accounts listed. License Master is considered the Field Authority as it is the active record for the customer. Any differences between these will be noted in the Discrepancy Logging Sheet.
 - Log with the License Quantity Discrepancy Type.
 - Example: License Master lists 2500 customer accounts, CRM lists 1500 customer accounts.

- License Quantity: User Accounts - CRM, License Master
 - CRM and License Master both have the total number of Users or Manitou Concurrent Users listed. License Master is considered the Field Authority as it is the active record. Any differences between these will be noted in the Discrepancy Logging Sheet
 - Log with the License Quantity Discrepancy Type.
 - Example: License Master lists 10 Users, CRM lists 8 Concurrent users

Discrepancy Fields by Licensing Resource			
Discrepancy Field	License Master	CRM	Licensing Sheet
Central Station / Account #	X	X	X
Licensed Accounts	X	X	
Licensed Users	X	X	

Discrepancy Logging Sheet

The discrepancy log sheet exists to track the inconsistent data that is stored between the 3 locations for licensing data. The purpose of the discrepancy log sheet is to allow technicians to quickly record the discrepancies found during licensing without excessively disrupting workflow. Additionally, the discrepancy log will can act as a change-log as the 3 Licensing Resources are updated and corrected. The sheet is meant to be audited [Time Expectation, TBA] to ensure that the discrepancies encountered are being billed and licensed correctly, while also updating the missing or incorrectly entered data.

Discrepancy Entry

When logging a discrepancy, technicians are responsible for logging the following fields.

Field	Expected Data
Date	Date discrepancy was identified and/or recorded
Reporter	Technician who logged discrepancy, contact point for questions about line entry
Account #	Enter Central Station ID from License Master - Record CRM Account Number in Notes
Company Name	Full Name of Company
City	City Listed in CRM
Country	Country Listed in CRM
Discrepancy Type	Choose the appropriate Discrepancy Type from the drop-down
Escalate - Yes/No	Customer account number discrepancies require escalation. Immediate can be used if a discrepancy is the cause of a down site.
Discrepancy Details	Description of the encountered discrepancy
Notes	Relevant notes about discrepancy

Updating License Values in CRM

If a discrepancy exists for the number of licensed customers or users between License Master and CRM is present, CRM should be corrected to the actual licensed quantity when the discrepancy is logged. The following instructions detail how to update or create these fields in CRM.

Number of Customer Accounts 1 of 2

With a customer record open in CRM, locate the No. Of Accounts in the upper right-hand corner of the page. Single-click the numeric value then update the No. Of Accounts to the value that will be licensed. Select the Save Button (Floppy Disk Icon) at the bottom right of the Page.

Number of Customer Accounts 2 of 2

Scroll down to the Licensing header and expand it while in the CRM customer record page. Double click on the No. Of Accounts line anywhere except the hyperlink. When the page opens, update the Quantity field with how many Customer Accounts are to be licensed. Select the Save Button (Floppy Disk Icon) at the bottom right of the Page.

Number of Users

Scroll down to the Licensing header and expand it while in the CRM customer record page. Double click on the No. Of

Users line anywhere except the hyperlink. When the page opens, updated the Quantity field with how many users are to be licensed. Select the Save Button (Floppy Disk Icon) at the bottom right of the Page.

Summary of Process

This process has been designed to record data discrepancies found during the licensing process without adversely increasing the time it takes to accomplish licensing actions. The general assumption is that CRM, License Master, and the Licensing Sheet will all be open during a license action. Cross-referencing the discrepancy fields and logging them can be accomplished during the licensing process with minimal workflow interruption. The diagram below illustrates the intended workflow.



Example of Real Entries into Logging Sheet

Entries should be clear and concise. If necessary, enter multiple lines for a single customer if more than 1 discrepancy exists for the customer.

Date	Reporter	Account #	Company Name	City	Country	Discrepancy Type	Escalate	Discrepancy Details	Notes
7/22/2019	Brody W	577041	Stop Alarma	Barcelona	Spain	License Quantity	NO	CRM listed Customer Licenses at 1,000	Adjusted CRM to 13,000 to match License master
7/22/2019	Brody W	755	Security 1	Canberra	Australia	Account Number/Name	YES	License Master Account Number is 742009, CRM is 755	742009 is not listed or searchable in CRM
7/29/2019	Brody W	477	TC Security Company Inc.	South Bend	USA, Indiana	Expiration Date	NO	License Master expires 1/31/20. Sheet lists 8/31/2019	License updated on 7/30/19
7/29/2019	Brody W	477	TC Security Company Inc.	South Bend	USA, Indiana	Other	NO	TC Security is not in License Master, Licensed with Old License Master Server	Added TC Security with Central Station ID 477