Brivo Partner Portal User Guide

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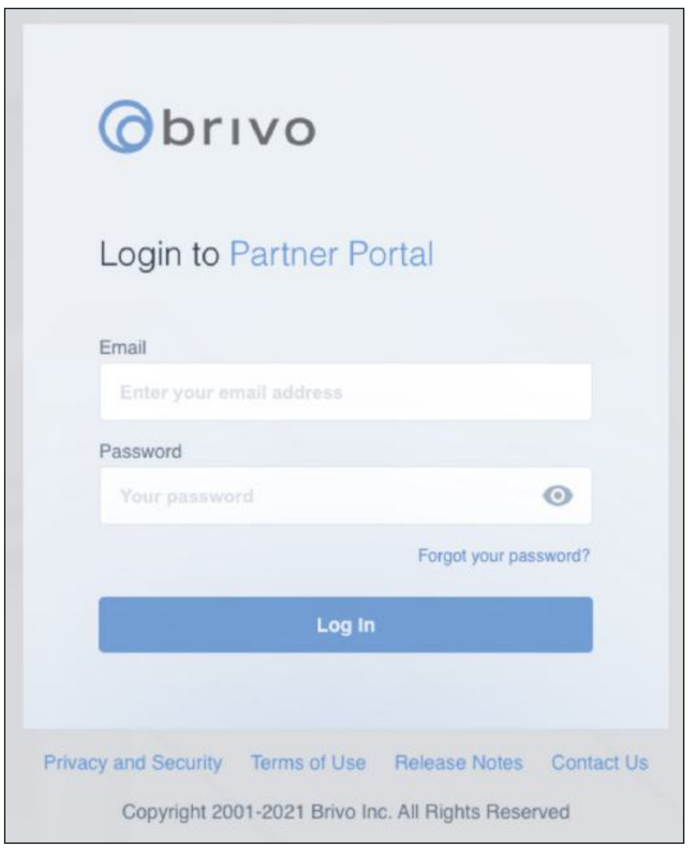
Brivo Partner Portal

As part of our ongoing commitment to providing you with the highest level of customer satisfaction, we would like to introduce you to the Brivo Partner Portal. Through the Partner Portal, you will be able to create new Brivo customer accounts, view detailed information regarding your end user accounts, and download all the latest marketing and technical documents.

Sign In

1. To sign into the Partner Portal, go to https://portal.brivo.com. A link to create a password was included in your activation email sent from Sales Administration during your onboarding process.

2. Enter your email address and password and click **Log In**.



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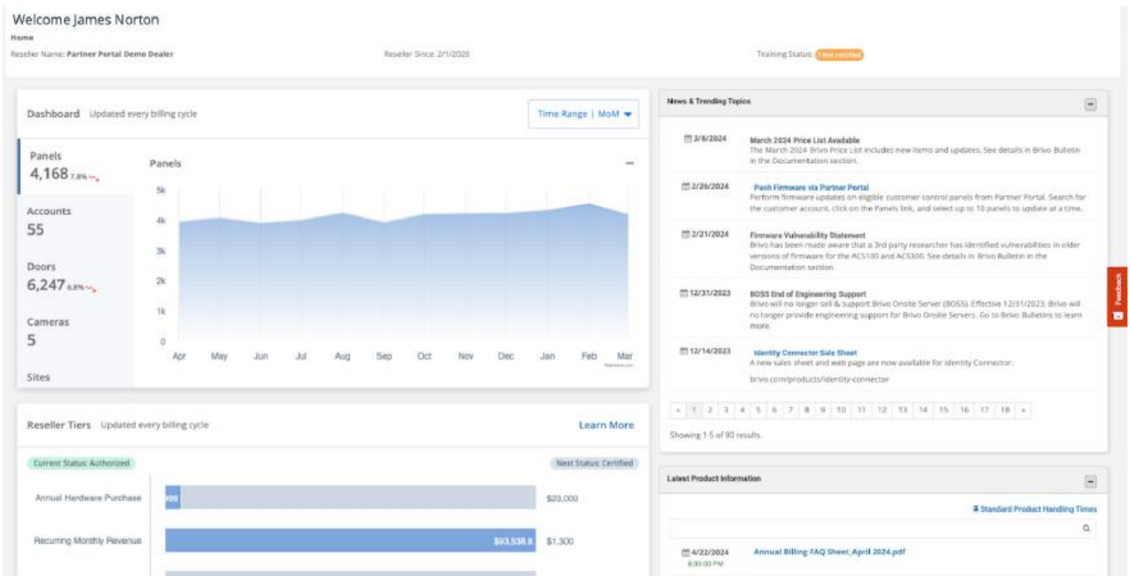
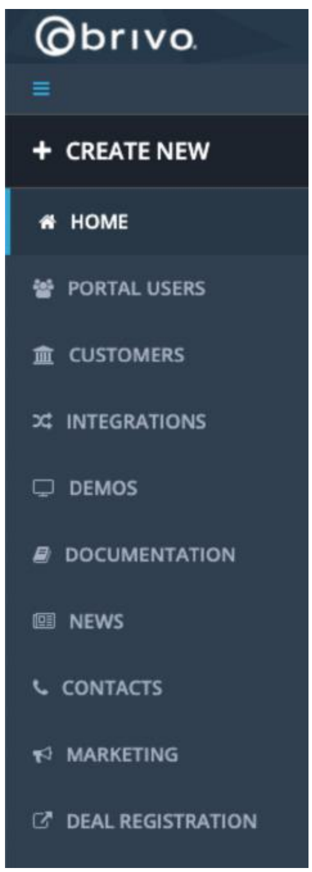
3. Once logged in, the homepage allows you to view the various types of information on your account, such as your Current Reseller Status, a Reporting Dashboard, News & Trending Topics provided by Brivo, the status of the control panels of your customers, your Reseller Tier, Annual Sales Target, and an Activity Log for your account.



4. The tabs on the left side of the screen allow you to navigate through the Brivo Partner Portal. The functionality of each link is described next.



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Functionality Descriptions

Create New:	This link will allow you to create a Brivo end user account, to request a Brivo demonstration, and, if you are the subscription owner or account creator, to add new portal users.
Home:	This link takes you to your homepage which allows you to view a summary of your account.
Portal Users	This link takes you to the Portal Users page to manage users within your Partner Portal account.
Customers:	This link allows you to view a complete list of your Brivo end user accounts.
Integrations:	This link allows you to view current integrations and set up new integrations.
Demos:	This link allows you to request a Brivo demonstration with our Sales Support team for your prospective end users.
Documentation:	This link allows you to view and download product documentation.
News:	This link allows you to view Brivo Blogs on cybersecurity and much more.
Contacts:	This link provides you with contact numbers to our support team and your sales manager.
Marketing:	This link allows you access to the marketing tools to run your own lead campaigns and access Brivo product images and much more.
Deal Registration	This link takes you to the Deal Registration form to register new projects and potentially qualify for additional benefits and support.

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Reporting Dashboard

The Reporting Dashboard provides various charts and reports to help resellers track changes in their customer portfolio, track reseller growth, track meeting annual targets, and proactively manage customer issues. These charts and reports are available to Portal Users with the appropriate permissions. (see role matrix on page 22).

Month over Month Dashboard

These charts will allow you to see how many panels, accounts, doors, cameras, and sites have been added or removed month over month. The data in these charts are based on previous monthly billing cycles.

To see the details about what has changed between the most recent bills:

1. Click on the three dots, then click **View Report**.
2. Sort the Detailed Report by various columns by clicking on the column label.
3. Download a .CSV version of the report by clicking on the **Download Report** button.

Year over Year Dashboard

These charts will allow you to see how many panels, accounts, doors, cameras, and sites have been added or removed year over year. The data in these charts are based on previous 12 monthly billing cycles.

To see the details about what has changed over the last 12 months:

1. Click on the three dots, then click **View Report**.
2. Sort the Detailed Report by various columns by clicking on the column label.
3. Download a .CSV version of the report by clicking on the **Download Report** button.

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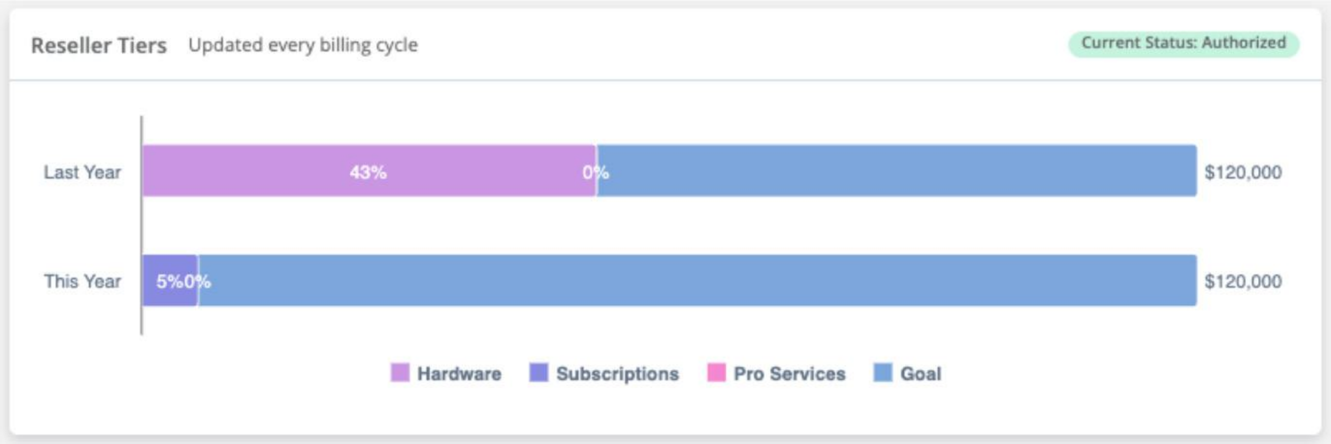
Reseller Tier Scorecard

This will allow you to see how you are progressing towards your revenue goals this year, and if you reached your goals last year.



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Offline Panels Report

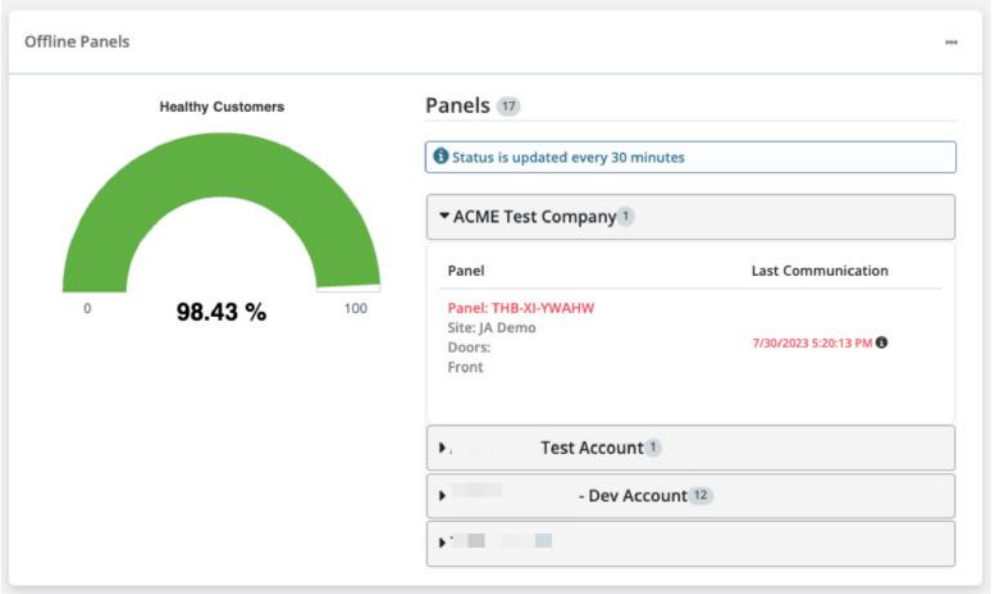
The Offline Panels chart let's you get an overall view of the health of your accounts. You can see how many panels are offline, and when the last communication was.

To download a full list of all Offline Panels:

1. Click on the three dots, then click **View Report**.

2. Sort the Offline Panels Report by various columns by clicking on the column label.

3. Download a CSV version of the report by clicking on the **Download Report** button.



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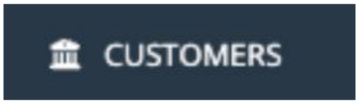
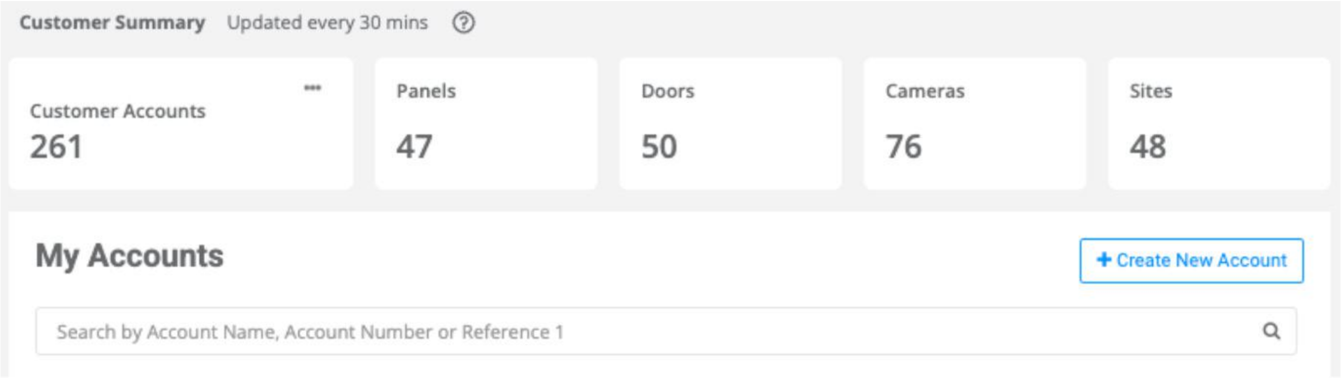
Account Creation

Creating an Account

1. From the left navigation panel, click on **Customers**.



2. Click on **Create New Account** in the My Accounts section.



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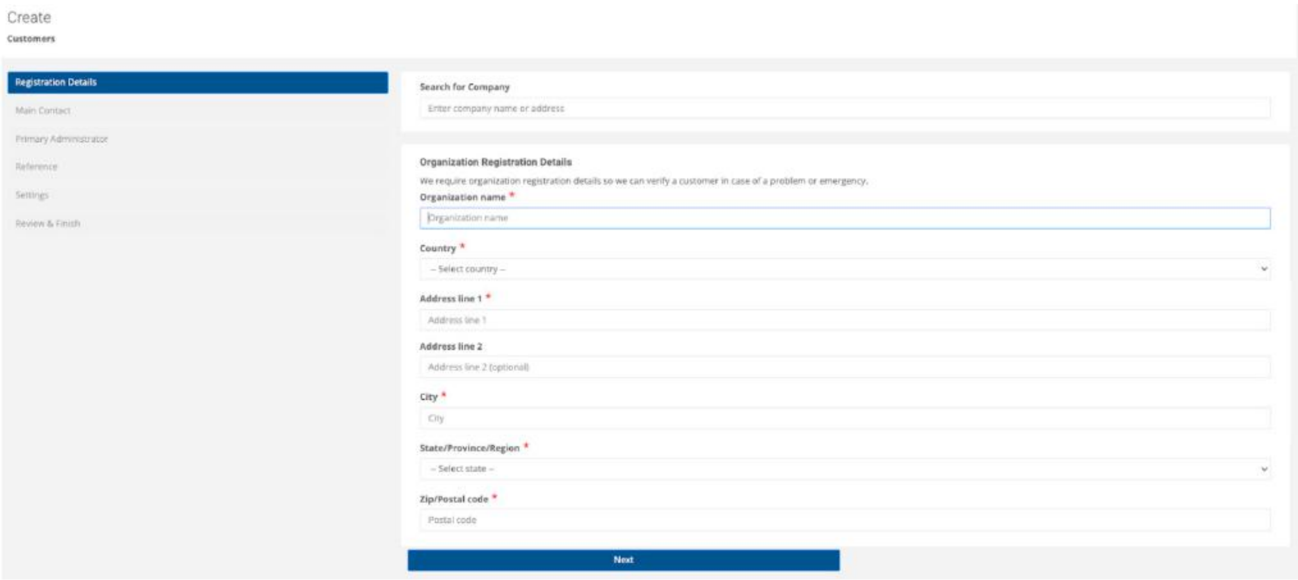
Registration Details

1. Enter the **Organization registration details** into the designated fields. The **Search** box allows you to find companies in your geographical area by typing the company name and selecting the desired company from the dropdown list.



2. Once all the fields are completed, click **Next**.

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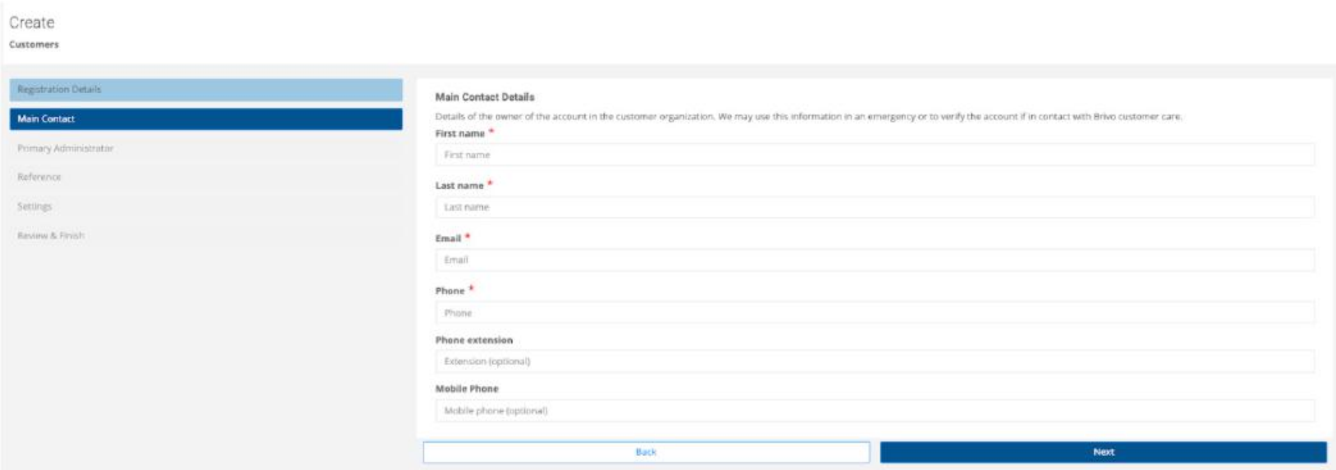
Main Contact

The main contact is the person at the customer's location whom you would contact in an emergency or to verify the account when contacting Brivo Customer Care.

1. Complete the fields for the **Main contact details** page.



2. When finished, click **Next**.

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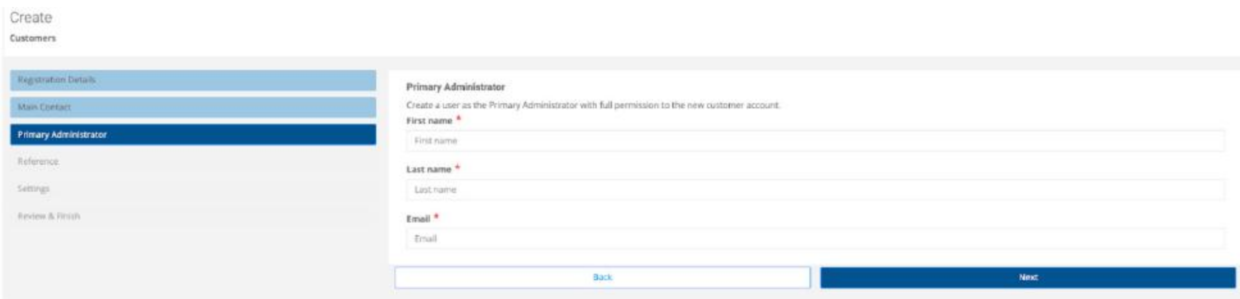
Primary Administrator

The **Primary Administrator** is the end user whose overall responsibility is to manage the Brivo system, such as adding users, creating schedules, and assigning credentials. When creating the Primary Administrator, enter the end user email address.

1. Complete the fields for the **Primary Administrator details** page.

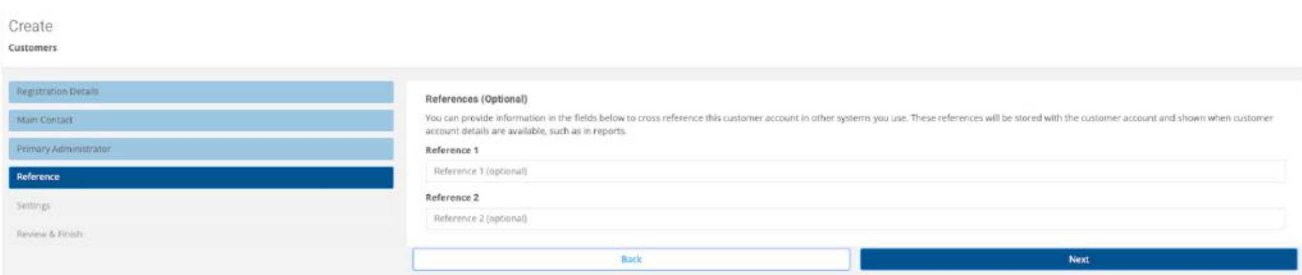


2. When finished, click **Next**.

Reference

The reference fields are optional and can be used to add additional information on your monthly invoice. For example, you can input an internal customer reference number so that the Brivo account can be more easily matched in your system. These are not required and can be left blank or filled in based on your business needs.

1. Optionally, complete the fields for the **Reference** page.



2. When finished, click **Next**.

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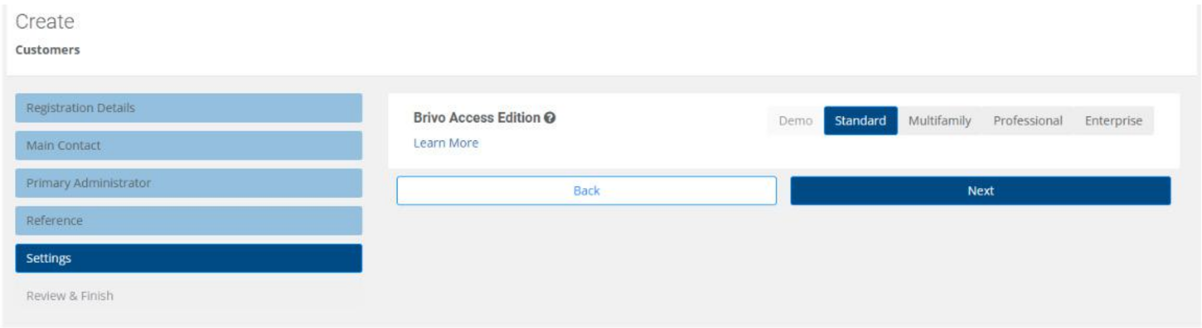
Settings

You can set the account's Brivo Edition on the Settings tab. The Editions available are **Standard**, **Professional**, **Multifamily**, and **Enterprise**. Your Brivo Sales Representative can provide you with what features are available with each Edition.

1. Use the dropdown menu to select the Brivo Edition for this account.

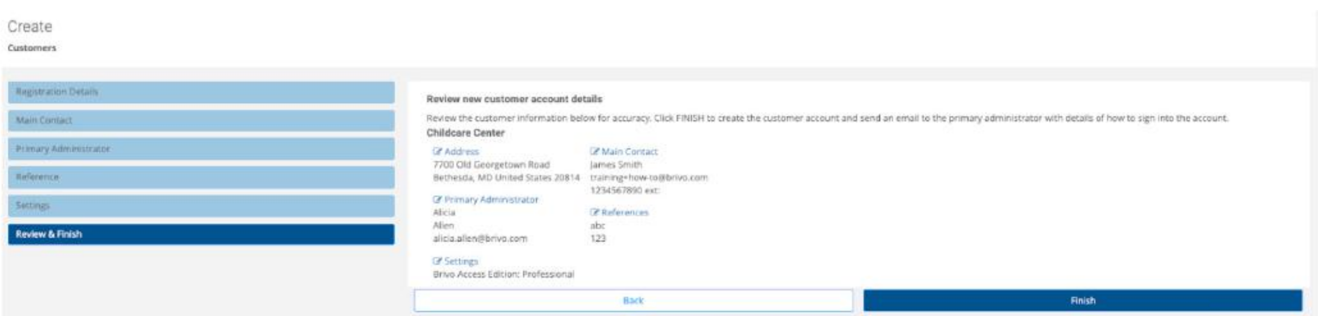


2. When finished, click **Next**.

Review and Finish

The **Review new customer account details** page displays all the relevant information about the new customer account. Please review this information for accuracy. If edits are necessary, either click on the edit symbol next to the text header or click on the section of the **Blue Step Navigation** bar on the left to go back to the screen you need to edit.

1. Review the details of the new customer account.



2. Make edits as necessary.

3. When finished, click on **Finish** and the system will create the end user account.

NOTE: *Once you have clicked on the **Finish** button, you will not be able to change the Account Name or Primary Administrator. If you need to make these changes after you have pressed the **Finish** button, please email Sales Administration (administration@brivo.com).*

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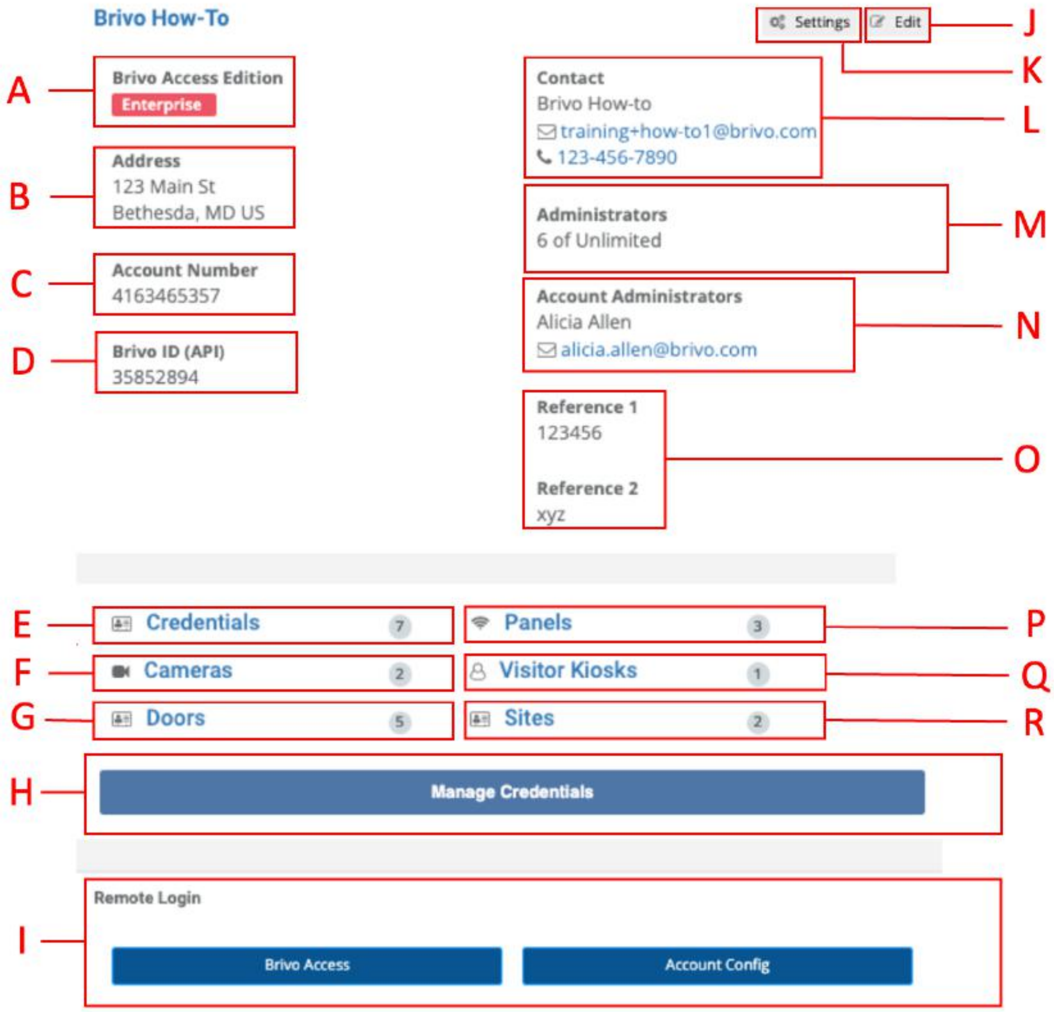
4. Once created, the end user account details will appear. In the summary section, you can click on the values to view additional details within the end user account.



End User Account Details Key

A. **Brivo Access Edition:** This lists the current Brivo Access Edition that is assigned to the end user's account.

B. **Address:** Address used when creating the end user account which will also appear on your monthly invoice.

C. **Account Number:** Account number generated when creating the end user account which will also appear on your monthly invoices.

D. **API:** Brivo ID generated when creating the end user account.

E. **Credentials:** Number of cards (credentials) in the end user account.

F. **Cameras:** Cameras integrated with your customer's account. You can also view the doors where the cameras are assigned and enable Brivo Snapshot on compatible cameras.

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G. **Doors:** Number of doors listed by door name, the panel name, and the type of panel assigned to a specific door.

H. **Manage Credentials:** Allows you to manage all digital credential subscriptions. Click on the blue button allows the reseller to purchase more Brivo Mobile Passes, Brivo Wallet Passes, and Allegion Mobile Passes. This is discussed further in Chapter 5.

I. **Remote Login:** Remotely access a customer's account in Brivo Access.

J. **Edit:** Portal Administrators may edit Address, Contact, and Reference 1 and 2.

K. **Settings:** Update account settings, such as Brivo Edition and Remote Access assignments.

L. **Contact:** Indicates the main contact for the account.

M. **Administrators:** Shows the current number of administrators and max limit of administrators on an account. Clicking on the blue button allows the reseller to increase the administrator limit which is discussed further in Chapter 5.

N. **Account Administrator:** Indicates the Primary Administrator for the account.

O. **Reference 1 and 2:** Custom fields (e.g., as billing references) used by the reseller.

P. **Panels:** Number of control panels listed on your end user account. You may view detailed information such as panel communication, latest firmware and the control panel number.

Q. **Brivo Visitor:** Number of Brivo Visitor Kiosks listed by device name, Kiosk ID, the issue date, activated date, status, and action. You can also add a new Visitor Kiosk, edit a Brivo Visitor device name, and deactivate a Brivo Visitor Kiosk ID.

R. **Sites:** Number of sites created on the end user account.

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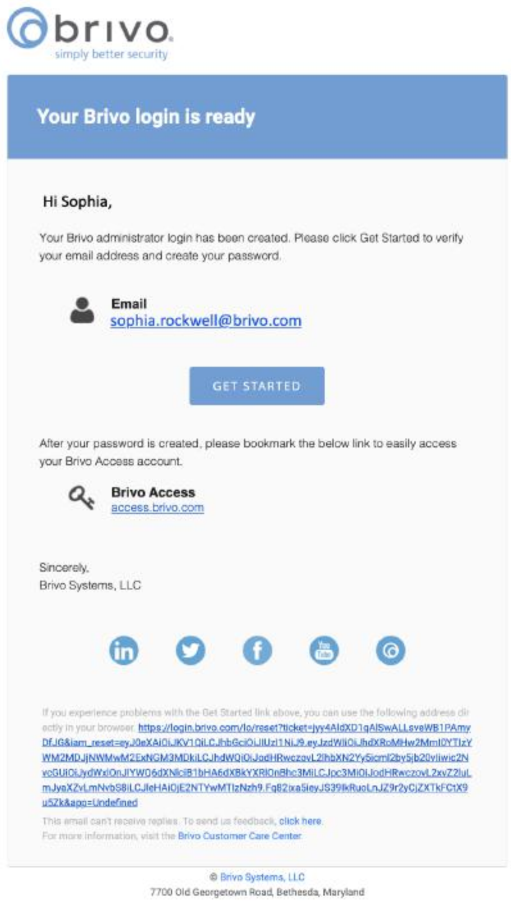
5. Once the end user account is created, an email notification will be sent to the Primary Administrator. In the notification email, the recipient should click on the **Get Started** button which will allow them to create a permanent password.



6. Congratulations, you have successfully finished creating a customer.

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Important Information

Did you know that…

After creating the end user Brivo account, you need to remotely access the account to finish setting it up.

If there is an issue during the account creation process, the system will provide the following message: Click **Retry** to complete the Customer Creation process. This will allow you to retry that step of the creation process.

The shortcuts on the top right side of the page will allow you to access other sites within Brivo.

If you have additional questions, please call Brivo at 866-692-7486 and ask for Sales Administration or email administration@brivo.com.

Roles

Role Based Permissions in Partner Portal

Partner Portal Users are people with access to Brivo Partner Portal. Partner Portal roles can be an assigned or custom set of permissions that allow a Portal User to access the various sections of the Partner Portal. Depending on the role assigned to a Portal User, that user is granted permissions to different portions of the Partner Portal interface as well as access to certain processes in the Partner Portal.

Partner Portal Users may be assigned one or more roles. If multiple roles are assigned to a user, the permission set for each role is granted to that user.

Each account in the Partner Portal has one Subscription Owner.

Role Definitions

Below is a list of definitions of each of the default roles when creating or editing a Portal User.

Partner Portal Roles:

- **Account Creator:** Account Creator: Account Creator users can create Portal users, can create Brivo accounts, view and edit customer account details and account summaries, manage Brivo subscriptions, edit account settings, update panel firmware, and access all Brivo documentation and collateral.
- **Financial:** Financial users can view the account summary and details, annual sales target, door and camera counts, customer account summaries, and access all Brivo documentation and collateral.
- **Marketing:** Marketing users can view recent notifications and latest product information, customer account summaries, and access all Brivo documentation and collateral.
- **Sales:** Sales users can view recent notifications and latest product information, customer account summaries, and access all Brivo documentation and collateral.
- **Technician:** Technician users can view customer account information, add Brivo Access Cams, enable Brivo Snapshot, update panel firmware, and access all Brivo documentation and collateral.
- **Remote Access:** The Remote Access role can be added to Account Creators and Technicians. The addition of this role allows users to use the Remote Access feature.

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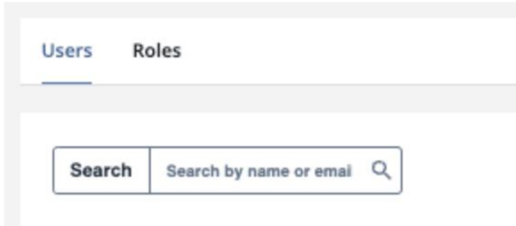
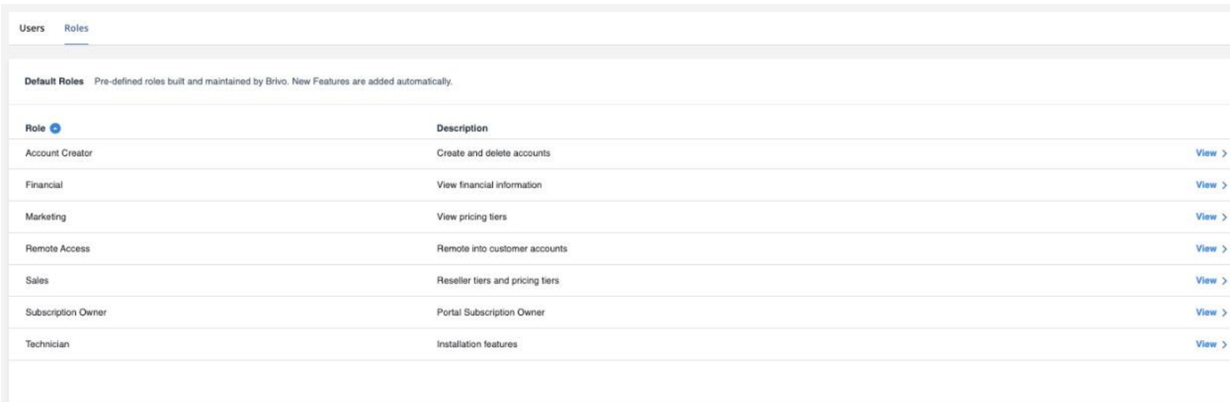
Viewing a Default Role

1. Click on the **Portal Users** button on the left side navigation bar.

2. Click on the **Roles** tab.



3. Click the **View** link on a specific default role.



4. Review the pre-defined permissions assigned to each default role.

NOTE: Default roles cannot be edited or deleted.

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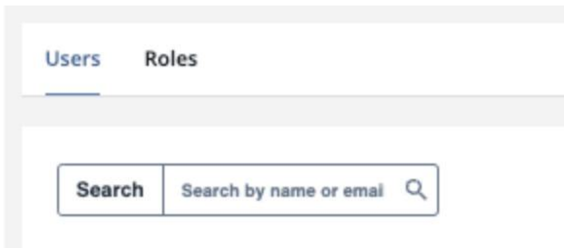
Custom Roles

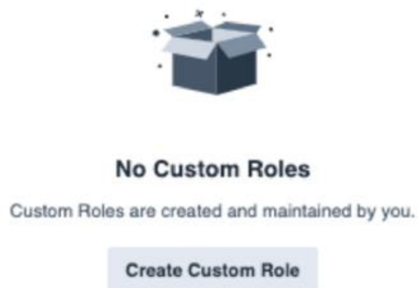
Custom roles can also be created to give users access to only the features they need to complete their job.

Creating a Custom Role

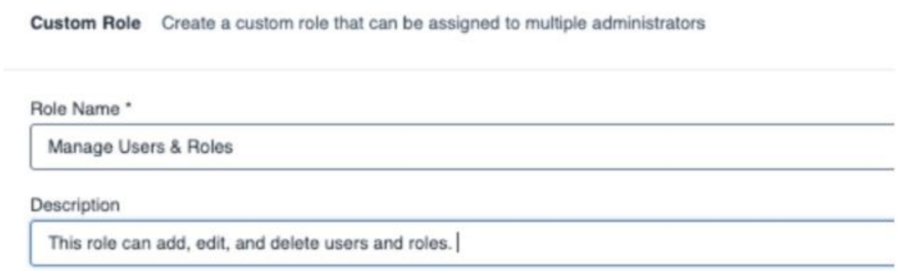
1. Click on the **Portal Users** button on the left side navigation bar.
2. Click on the **Roles** tab.



3. Click the Create Custom Role button.



4. Enter a **Role Name** and **Description**.



5. In the **Permissions** section, select whether users assigned to this role should have **No Access** or **Full Access** to each of the permissions in the list.

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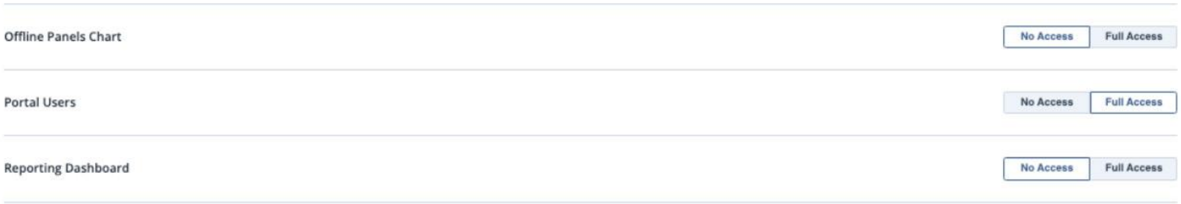
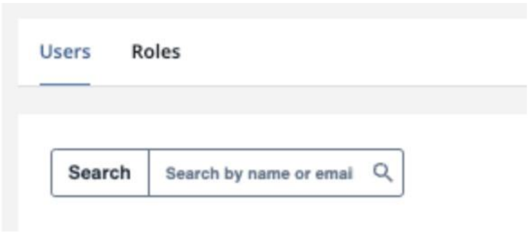


5. When finished, click **Save Changes**.

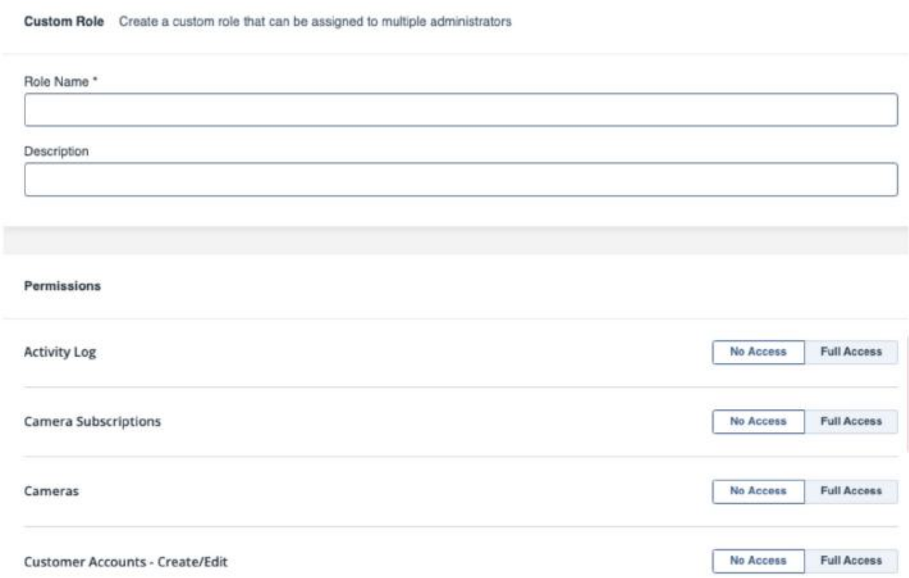
Editing a Custom Role

1. Click on the **Portal Users** button on the left side navigation bar.
2. Click on the **Roles** tab.



3. Click the **View** link on the custom role you wish to edit.

4. Update the **Role Name**, **Description**, or **Permissions** for this role.



5. When finished, click **Save Changes**.

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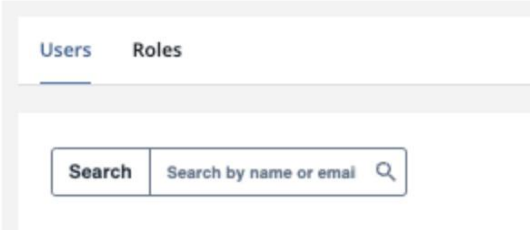
Deleting a Custom Role

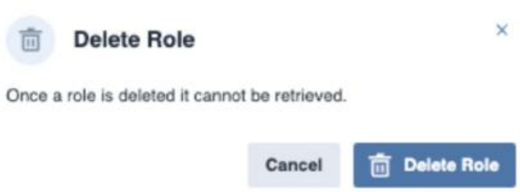
1. Click on the **Portal Users** button on the left side navigation bar.
2. Click on the **Roles** tab.



3. Click the **View** link on the custom role you wish to delete.

4. Click on the **Delete Role** button.

5. Confirm you wish to delete the role by clicking the **Delete Role** button.



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Permissions by Role

Below is a matrix of functionality and the permissions allowed by each default Portal User role:

Permissions Matrix

Permission	Subscription Owner	Account Creator	Financial	Marketing	Sales	Technician
Activity Log	✓	✓	✓	✓	✓	✓
Digital Credentials - Manage	✓	✓				
Digital Credentials - View	✓	✓				✓
Camera Subscriptions	✓	✓				
Cameras	✓	✓				✓
Customer Accounts - Create/Edit	✓	✓				
Customer Details	✓	✓				✓
Customer Settings	✓	✓				
Customers	✓	✓				✓
Demo Requests	✓	✓	✓	✓	✓	
Integrations	✓					
Offline Panel Chart	✓	✓				✓
Portal Users	✓	✓				
Reporting Dashboard	✓	✓	✓			
Reseller Tiers	✓		✓			
Visitor Kiosks - Manage	✓	✓				
Visitor Kiosks - View	✓	✓				✓

All roles are able to access documentation, news, contacts, marketing, news & trending topics, and the latest product information.

Remote Access Role - A user must have the Remote Access role in order to be visible in the Remote Access assignment dropdown menu. The Remote Access role can only be assigned to a user with at least one other role.

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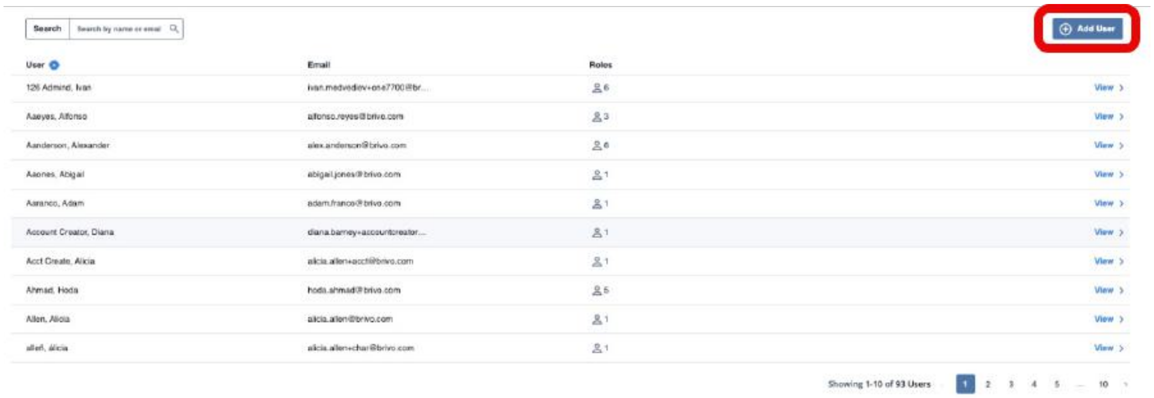
Creating a Portal User

Managing Portal Users and their roles can be done on the Portal Users page.

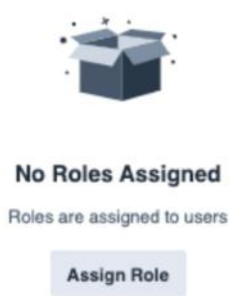
1. Click on the **Portal Users** on the left side navigation bar.

2. On the Portal Users page, click on **Add New User**.



3. Enter a **First Name**, **Last Name**, and valid **Email Address**.

4. Click on the **Assign Role** button to select the roles to assign to this user.



5. Select any combination of default or custom roles available in the **Role** list.

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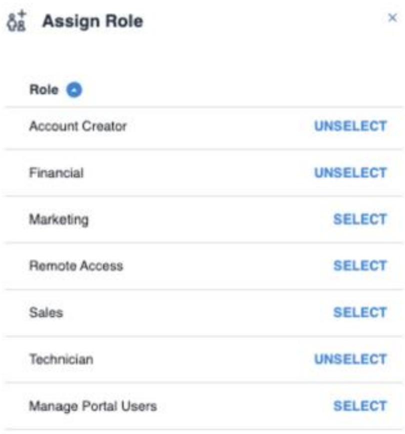
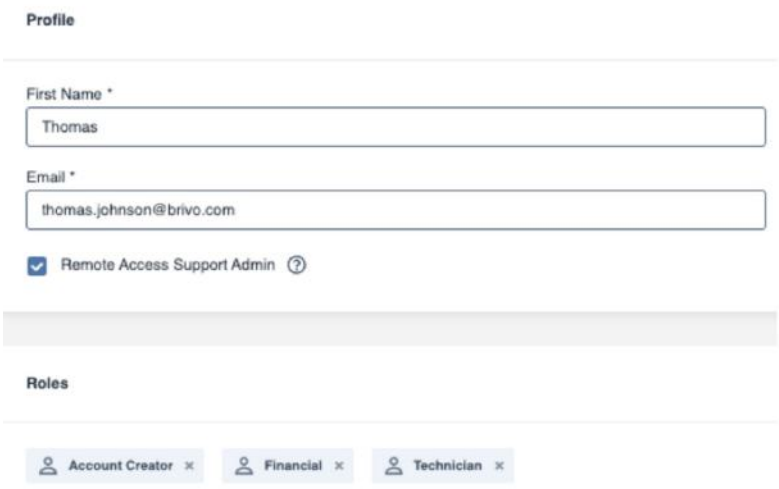


6. Select the **Remote Access Support Admin** checkbox if this user should be allowed to remotely access enabled customer accounts without a Remote Access assignment.



Once the Portal User is created, a notification email will be sent to the email address used when creating the Portal User.

The new Portal User will click on the **Get Started** button in the notification email and follow the instructions provided.

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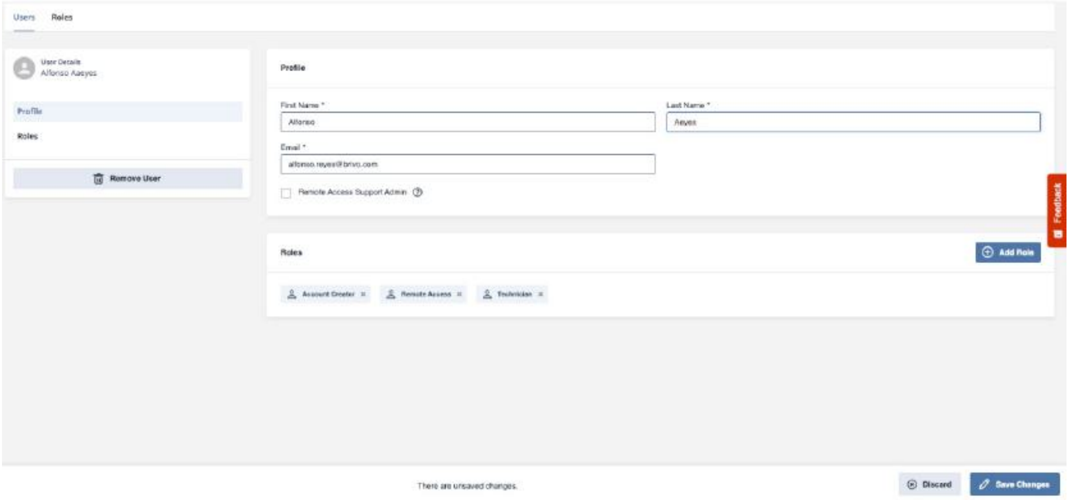
Editing a Portal User

1. On the Left Navigation bar, click on **Portal Users**.

2. Search for the name of the **Portal User** you wish to edit.

3. Click the **View** link for the Portal User you wish to edit.

4. Make the necessary changes to the user and click **Save Changes**.



NOTE: When editing the role for an existing Portal User, that user will need to log out and back in before the new role will take effect.

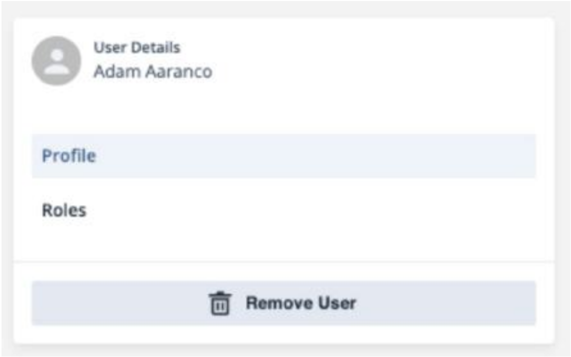
Deleting a Portal User

1. On the Left Navigation bar, click on **Portal Users**.

2. Search for the name of the **Portal User** you wish to delete.

3. Click the **View** link for the Portal User you wish to delete.

4. Click the **Remove User** button.



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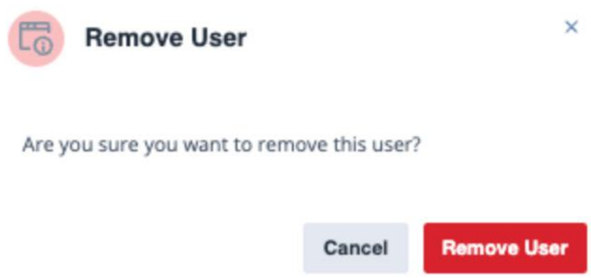
5. Confirm that you wish to delete this Portal User by clicking **Remove User**.



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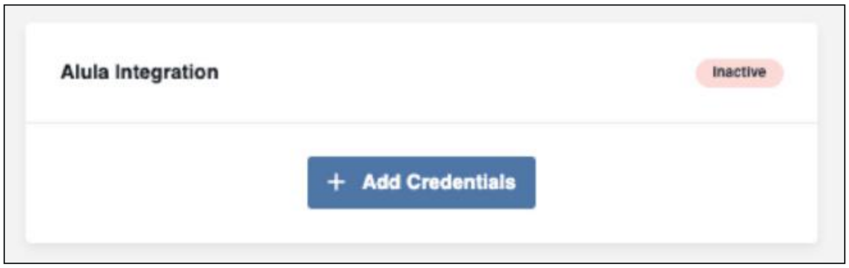
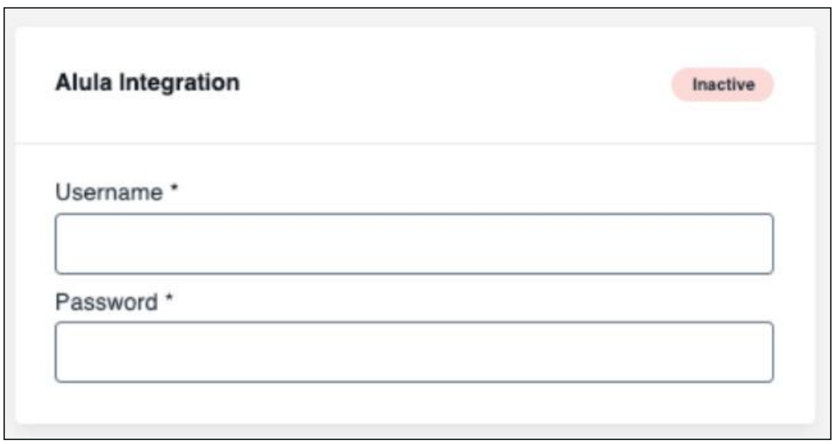
Reseller Account Settings

Adding Alula Reseller Credentials

1. Log into Partner Portal.
2. From the main page, click on the **Integrations** link on the left task bar.
3. Click on the **Add Credentials** button in the Alula Integration tile.



4. Enter **Alula Reseller Username** and **Password**.



5. Click **Save** when finished.

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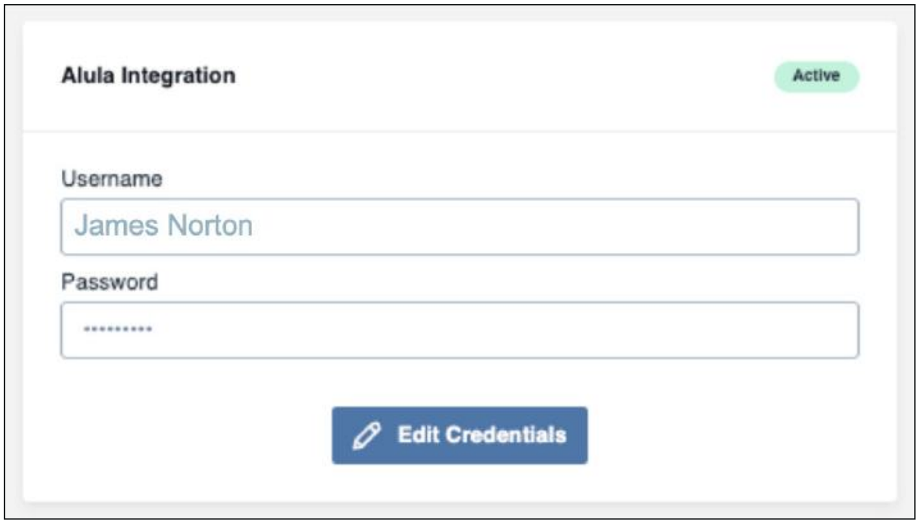
Editing Alula Reseller Credentials

1. Log into Partner Portal.
2. From the main page, click on the **Integrations** link on the left task bar.
3. In the Alula Integration section, click on the **Edit Credentials** icon.



4. Enter your updated **Alula Username** and **Password** and click **Save**.

Note: *If the credentials are listed as inactive, please make sure that your Alula account is up to date.*

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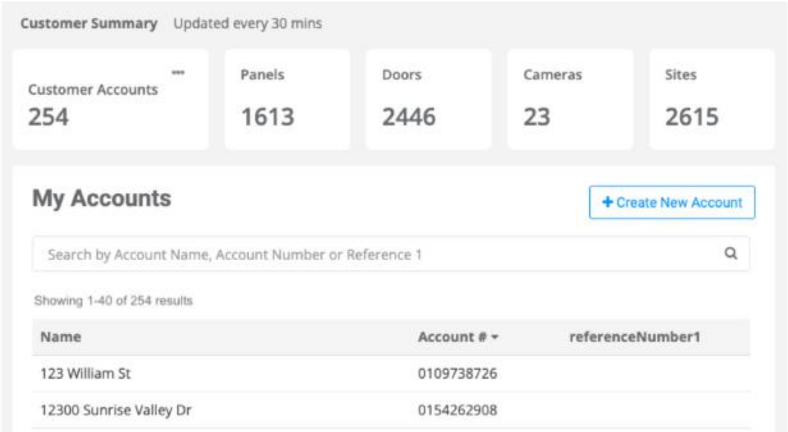
Customer Accounts

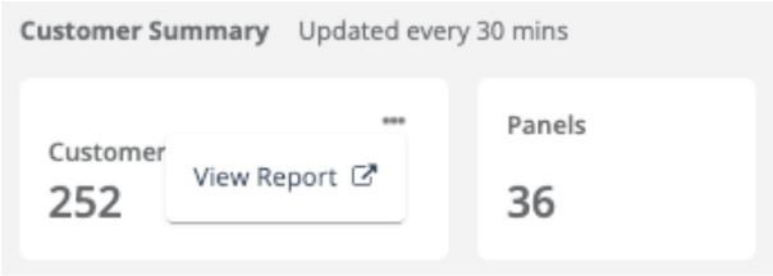
Customer Summary

On the Customers page, you are able to see a summary of your customer accounts, panels, doors, cameras, and sites. You can also run a customer report, see a full list of your customer accounts, and search customer accounts by account name, account number, and reference number.

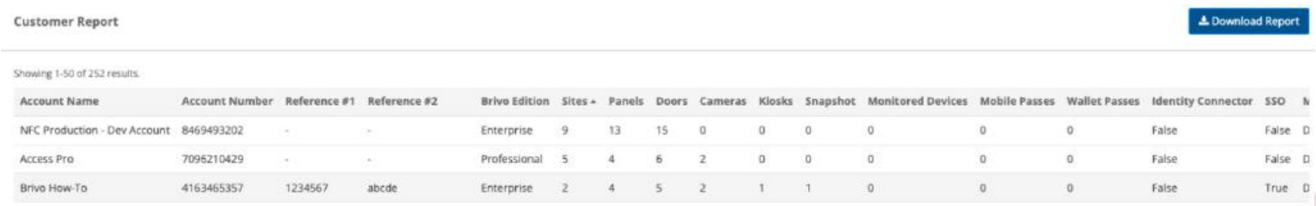


Pull a Customer Report

1. In the Customer Summary section, view the **Customer Accounts** tile.
2. Click on the three dots then click **View Report**.



3. Sort the Customer Report by various columns by clicking on the column label.
4. Download a .CSV version of the report by clicking on the **Download Report** button.



Account Name	Account Number	Reference #1	Reference #2	Brivo Edition	Sites	Panels	Doors	Cameras	Kiosks	Snapshot	Monitored Devices	Mobile Passes	Wallet Passes	Identity Connector	SSO
NFC Production - Dev Account	8469493202	-	-	Enterprise	9	13	15	0	0	0	0	0	0	False	False
Access Pro	7096210429	-	-	Professional	5	4	6	2	0	0	0	0	0	False	False
Brivo How-To	4163465357	1234567	abcde	Enterprise	2	4	5	2	1	1	0	0	0	False	True

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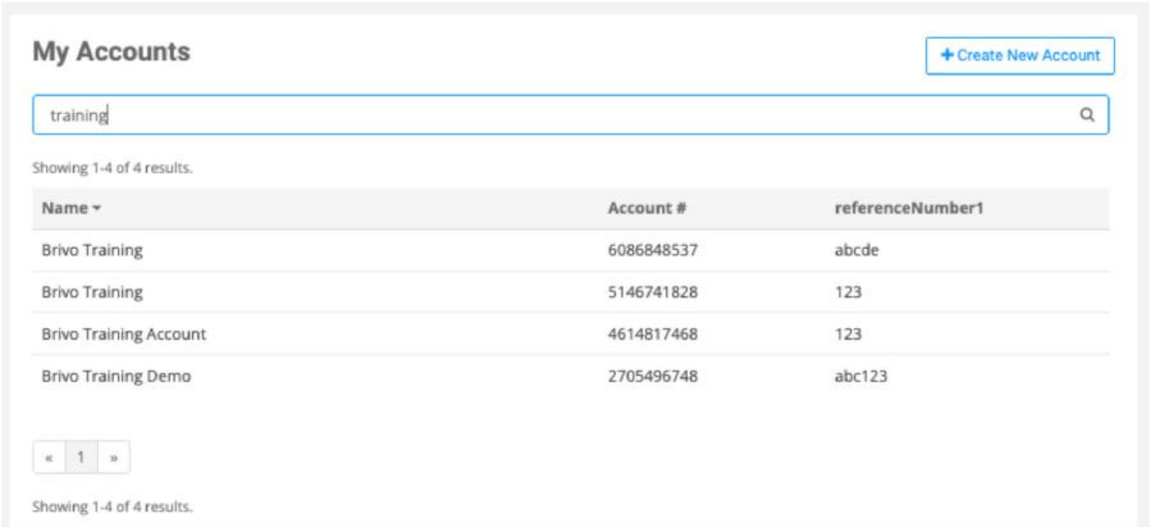
Search Customer List

1. In the My Accounts section, enter a search term in the Search Box.
2. You can search by Account Name, Account Number, or Reference 1.



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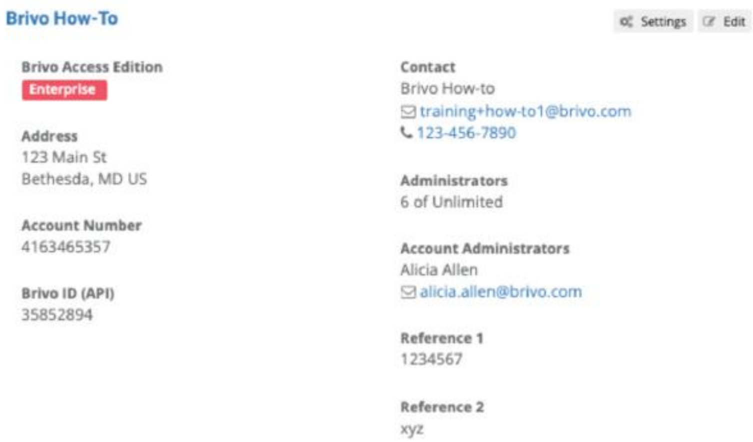
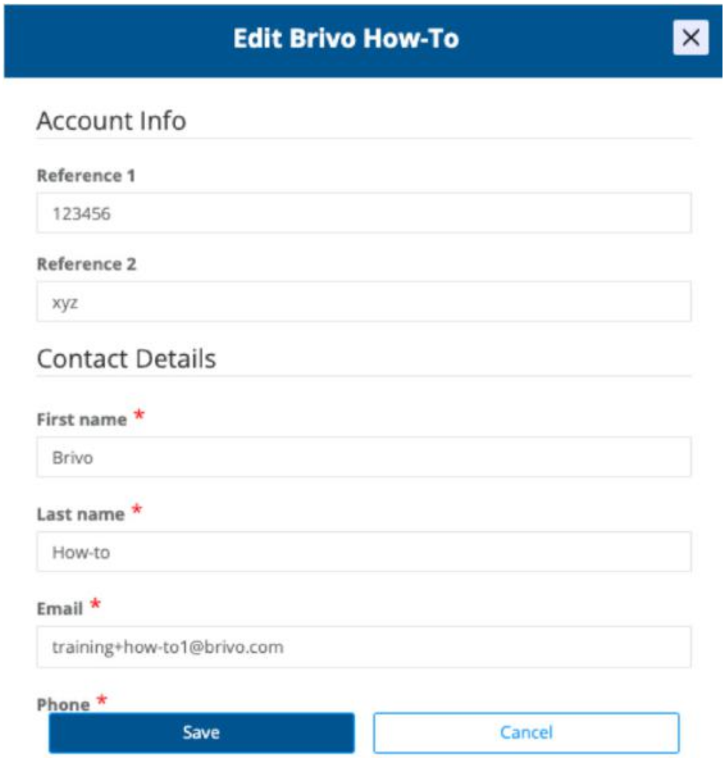
Update Customer Details

Portal Users with the appropriate roles (see Role Matrix on page 22) have the capability to update the specific details of a customer.

1. Log into Partner Portal.
2. From the main page, click on the **Customer** link on the left task bar.
3. Select your customer from the list provided.
4. In the **Account Summary** section, click on **Edit**.



5. Make any necessary updates to reference fields, contact details, or account address and click **Save**.



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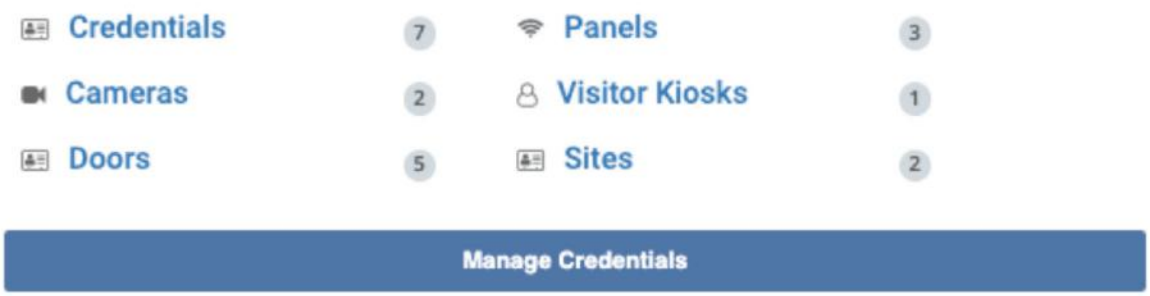
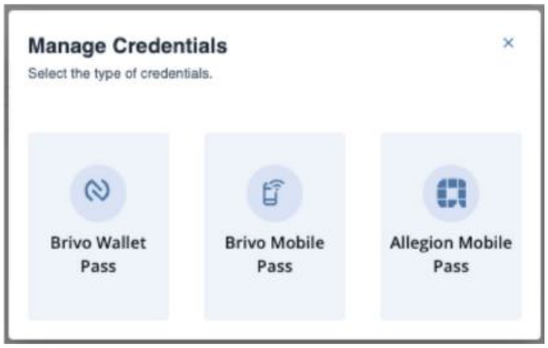
Managing Digital Credentials

This section describes how to manage Brivo Mobile Pass, Brivo Wallet Pass, and Allegion Mobile Pass subscriptions on a customer's account using the Partner Portal.

1. Log in to the Partner Portal.
2. Click on the **Customers** link on the left.
3. Select your customer from the list.
4. Under the Summary section is the Manage Credentials button.



5. Click on the **Manage Credentials** button and you will see a popup window to select the credential type that you want to manage. If a customer account does not have a credential type enabled, you will not have the option to update the subscription.



6. Select the credential type you want to manage.
7. Use the **Add** or **Remove** buttons to select the number of passes that should be allotted to the customer account and click **Save**.

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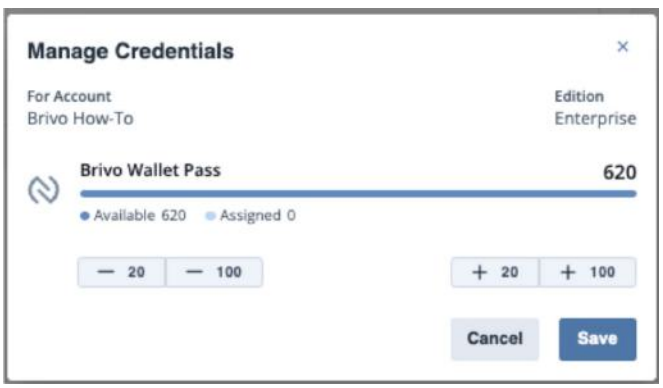
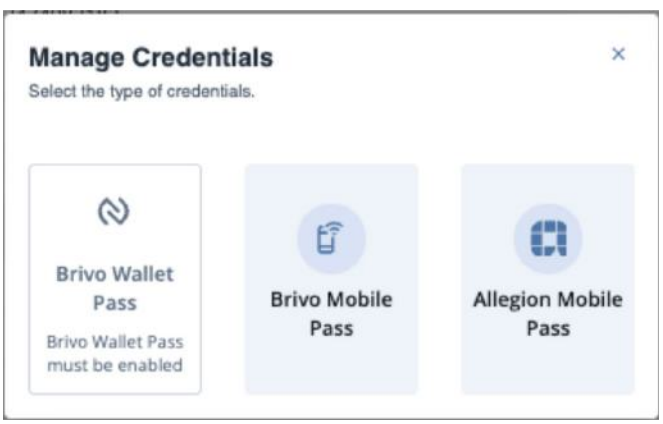
Brivo Mobile Passes

You can add or remove Brivo Mobile Passes in packs of 100. Brivo Mobile Passes are billed monthly and can be adjusted at any time. You will not be able to remove passes that are assigned to a user, so make sure the customer revokes any unused assigned passes if they want to reduce the pass subscription.

Brivo Wallet Passes

Brivo Wallet Passes can be purchased in packs of 20 or 100. Customers must have Brivo Mobile Passes in order to issue Brivo Wallet Passes. Brivo Wallet Passes are billed annually and cannot be removed via Partner Portal. In order to add Wallet Pass subscriptions, the feature must be enabled for the customer account. To have this feature enabled, please reach out to your Brivo Sales Rep.





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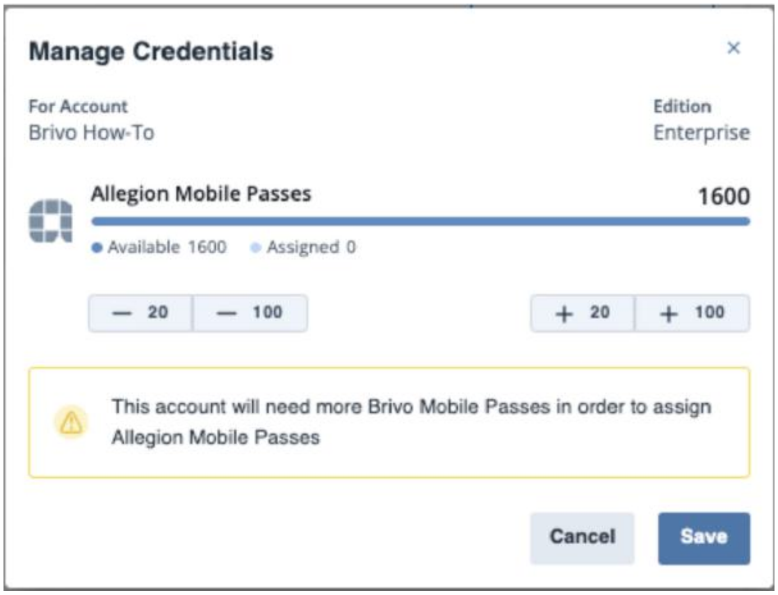
Allegion Mobile Passes

Allegion Mobile Passes can be purchased in packs of 20 or 100. Customers must have Brivo Mobile Passes in order to issue Allegion Mobile Passes. You will see a warning message if there are not enough Brivo Mobile Passes allotted to the account to accommodate the Allegion Mobile Pass subscription. Allegion Mobile Passes are billed monthly and can be adjusted at any time. You will not be able to remove passes that are assigned to a user, so make sure the customer revokes any unused assigned passes if they want to reduce the pass subscription.



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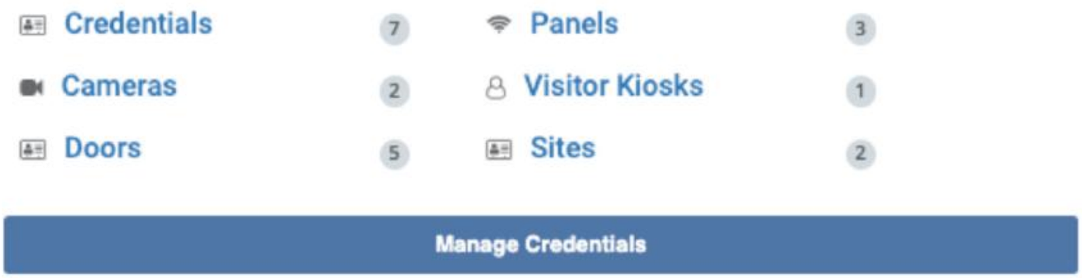
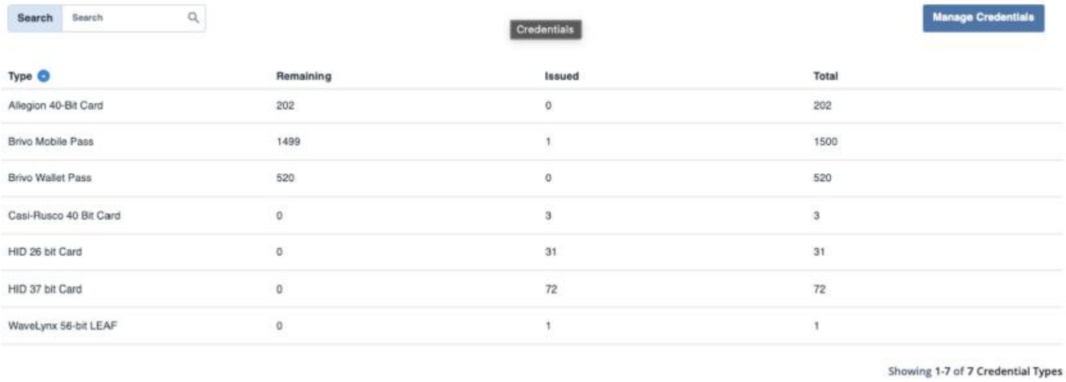
View Credentials

You can view more detailed information about credentials on a customer account.

1. Log in to the Partner Portal.
2. Click on the **Customers** link on the left.
3. Select your customer from the list.
4. In the Summary section, click the **Credentials** link.



5. View the credentials list.
    a. Type a credential type into the **Search** box to find specific credentials.
    b. Sort by columns as needed.



Type	Remaining	Issued	Total
Allegion 40-Bit Card	202	0	202
Brivo Mobile Pass	1499	1	1500
Brivo Wallet Pass	520	0	520
Casi-Rusco 40 Bit Card	0	3	3
HID 26 bit Card	0	31	31
HID 37 bit Card	0	72	72
WaveLynx 56-bit LEAF	0	1	1

Showing 1-7 of 7 Credential Types

There is also the option to add credential subscriptions from this screen by clicking the **Manage Credentials** button in the upper right corner.

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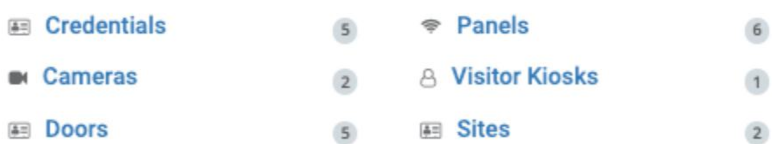
Managing Sites

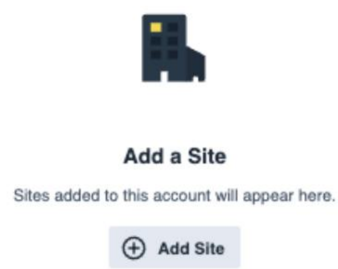
This section provides a description of how you can add, edit, and delete Sites on a customer's account using the Partner Portal.

Adding a Site

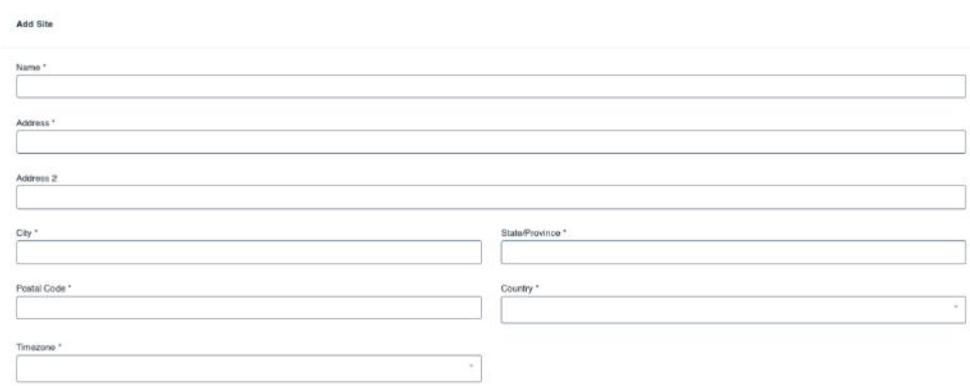
1. Log in to Partner Portal.
2. Click on the **Customers** link on the left navigation bar.
3. Select your customer from the list.
4. Click on the **Sites** link in the account summary pane.



5. Click on the **Add Site** button.



6. Fill in the Site **Name**, **Address** details, and **Timezone**.



7. When finished, click **Save Changes**.

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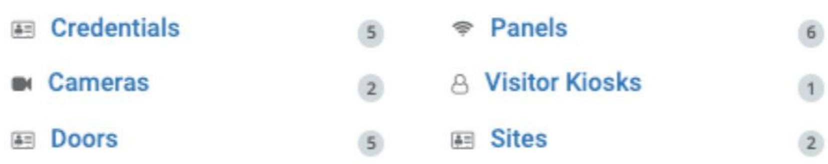
Editing a Site

1. Log in to Partner Portal.
2. Click on the **Customers** link on the left navigation bar.
3. Select your customer from the list.
4. Click on the **Sites** link in the account summary pane.

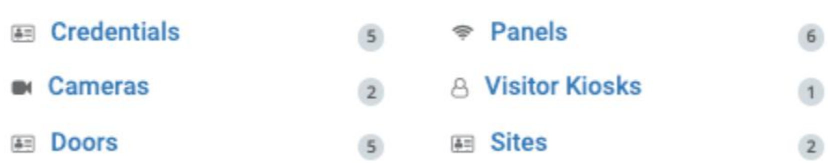


5. Click on the **View** link for the site you want to edit.

6. Make the necessary changes.
7. When finished, click on **Save Changes**.

Deleting a Site

1. Log in to Partner Portal.
2. Click on the **Customers** link on the left navigation bar.
3. Select your customer from the list.
4. Click on the **Sites** link in the account summary pane.



5. Click on the **View** link for the site you want to delete.

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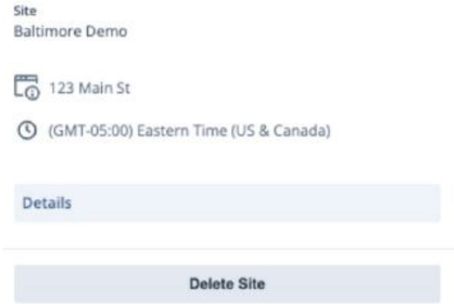
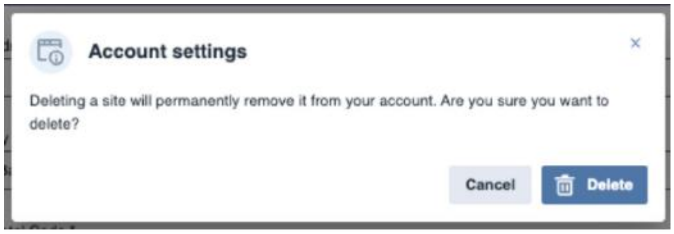
6. Click the **Delete Site** button.



7. Confirm you wish to delete the site by clicking **Delete**.



NOTE: You will not have the option to delete a site that has doors associated. Please remove all doors on the site before you try to delete the site.

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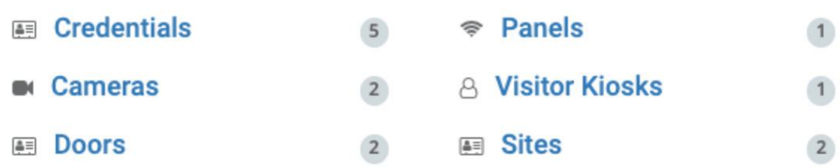
Brivo Visitor Kiosks

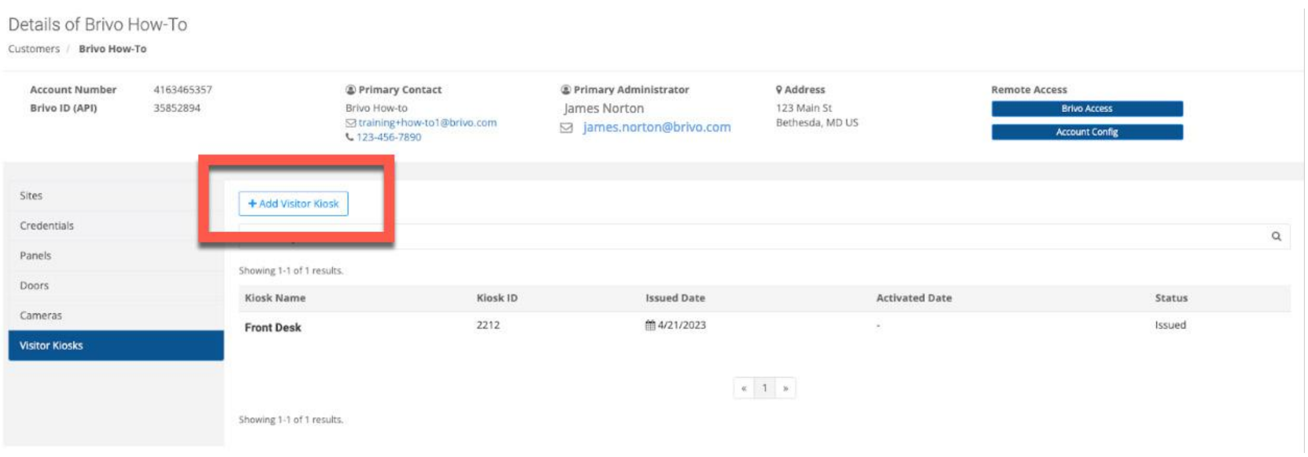
Adding a Brivo Visitor Kiosk

This section provides a description of how you can activate, edit, or deactivate a Visitor Kiosk for a customer's account using the Partner Portal.

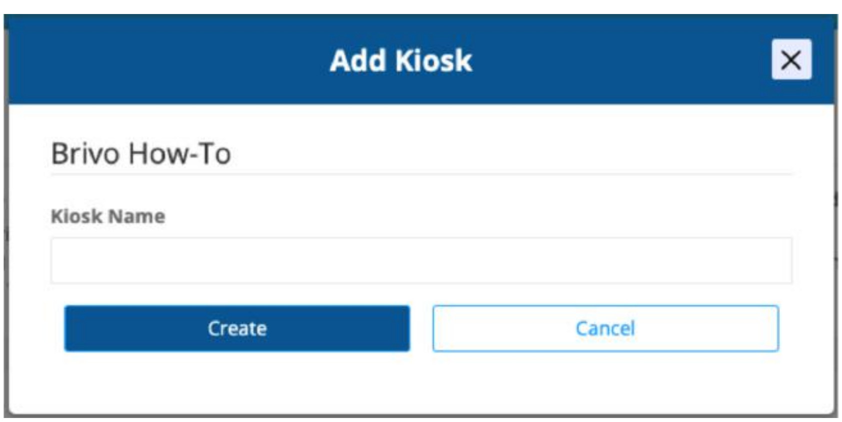
1. Log in to the Partner Portal.
2. Click on the Customers link on the left.
3. Select your customer from the list. The account summary page will appear.
4. Halfway down, the number of Brivo Visitors Kiosks is displayed.



5. Click on the link to view the Details page.
6. On the Details page, select the + Add Visitor Kiosk button. The Add Kiosk box appears.



7. In the pop-up window, enter a Kiosk Name and click the Create button.



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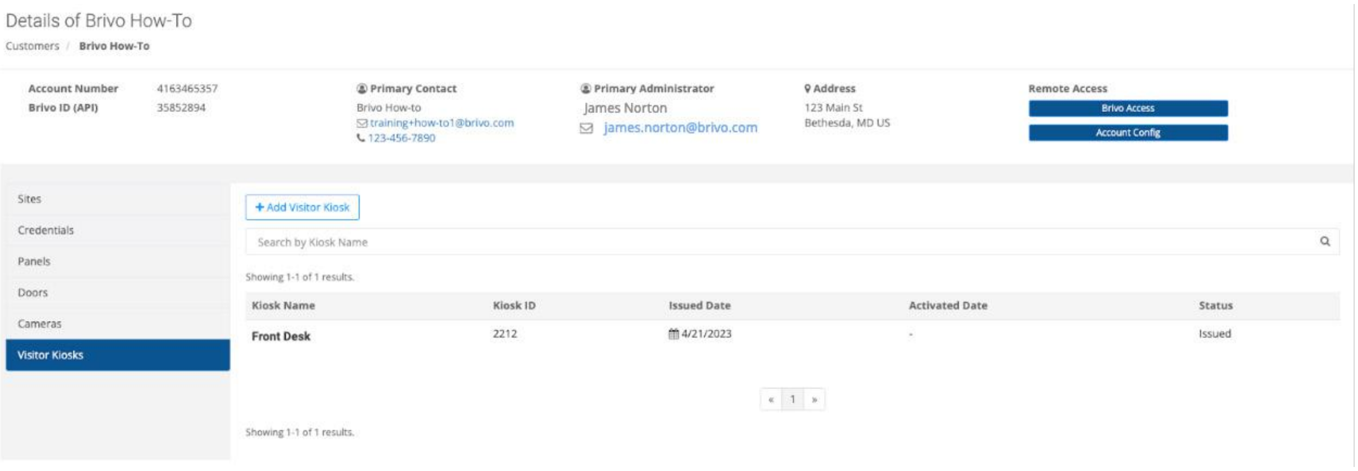
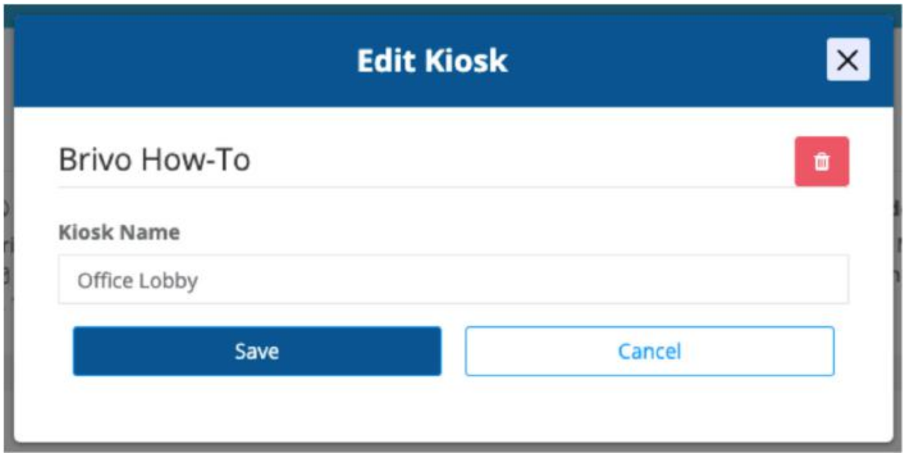
Deactivating a Brivo Visitor Kiosk

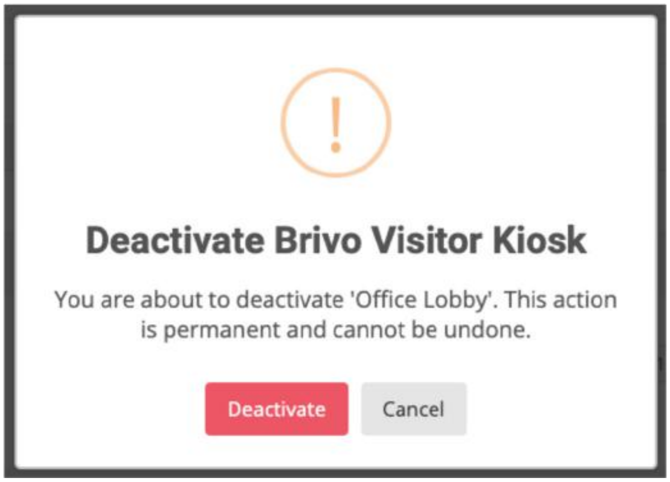
1. From the Details page, click on the Kiosk that you wish to delete. The Edit Kiosk pop-up window appears.



2. Click on the red **Delete** (trashcan) icon.



3. Confirm you wish to delete the Kiosk by clicking **Deactivate**.



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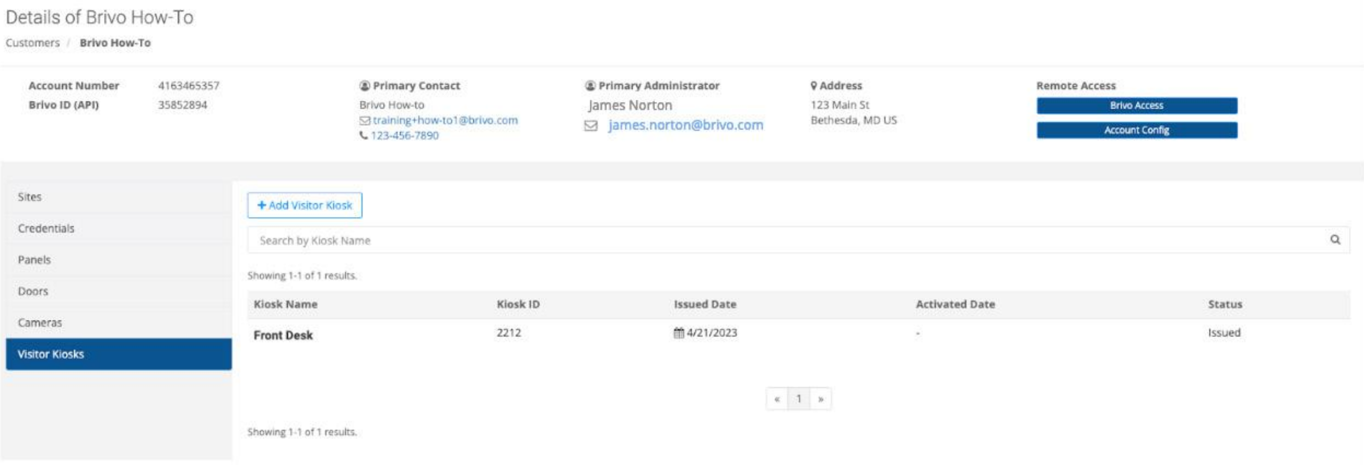
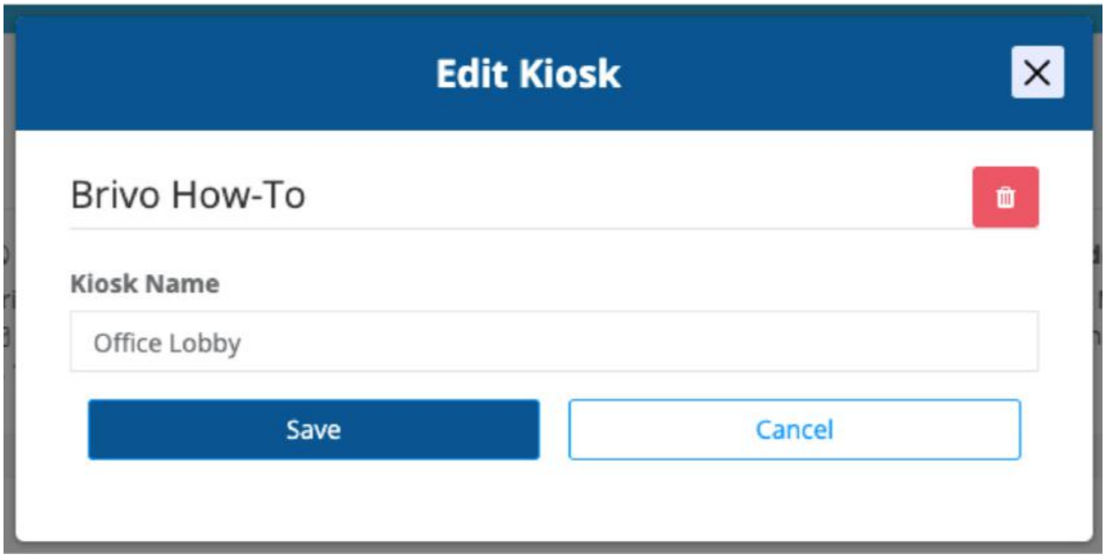
Editing a Brivo Visitor Kiosk

1. From the Details page, click on the Kiosk that you wish to edit. The Edit Kiosk pop-up window appears.



2. Edit the Kiosk Name as desired. When finished, click **Save**.



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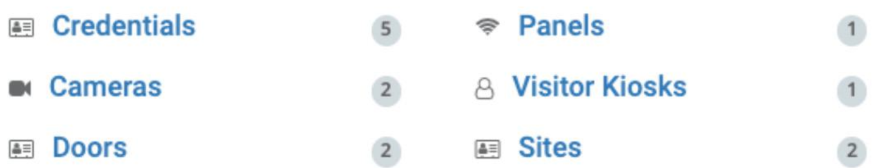
Brivo Access Cam

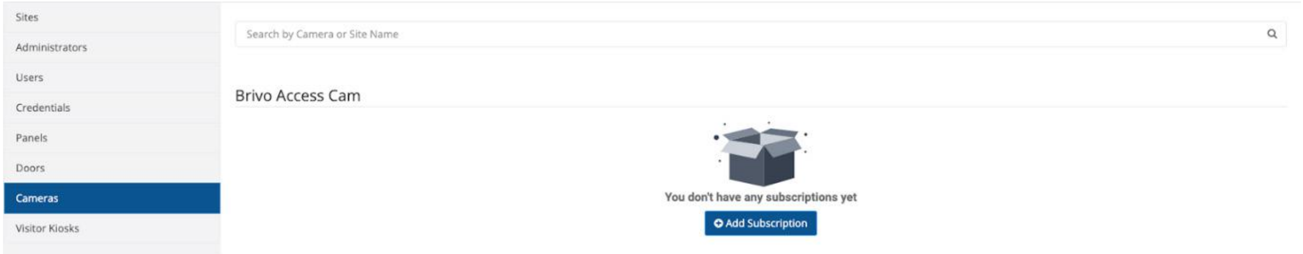
Adding a Brivo Access Cam subscription to an account

This section provides a description of how you can activate, edit, or deactivate a Brivo Access Cam subscription for a customer's account using the Partner Portal.

1. Log in to the Partner Portal.
2. Click on the Customers link on the left.
3. Select your customer from the list.
4. On the lower right hand side of the screen, the Summary box is visible. In that pane, the number of Cameras is shown.



5. Click on the link to view the Details page.
6. On the Details page, click the **Add Subscription** button. The New Brivo Access Cam Subscription box appears.



7. In the Add Brivo Access Cam Subscription pop-up window, the customer account name will be listed at the top.
8. In the **Email** field, this email address will be used to create the subscription in CameraManager. The email address will be your username when logging into CameraManager. It is also what is added to Brivo during the Brivo Access Cam setup. Finally, your password will be emailed to that email address.
9. Select your desired **Video Quality**, **Retention Time**, and **Max Number of Cameras** from the provided dropdown lists.
10. When finished, click the **Save Subscription** button.

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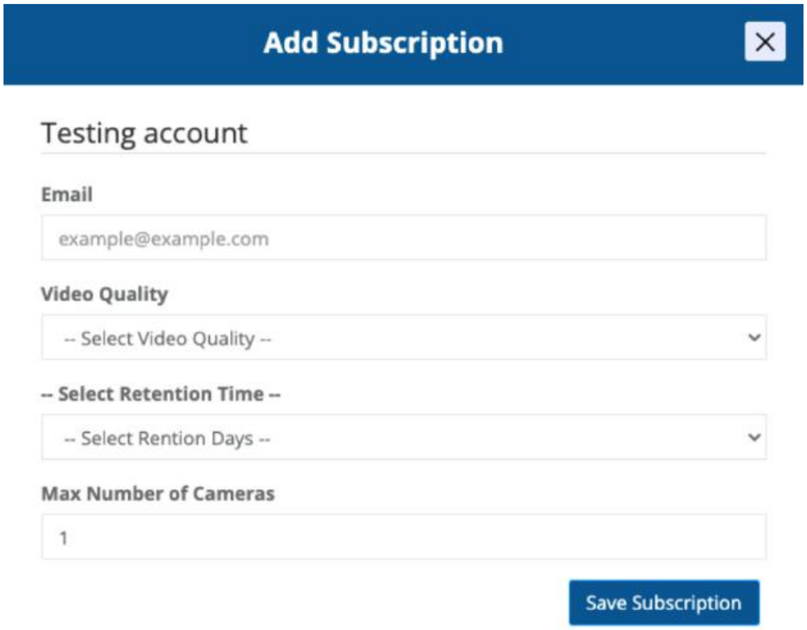
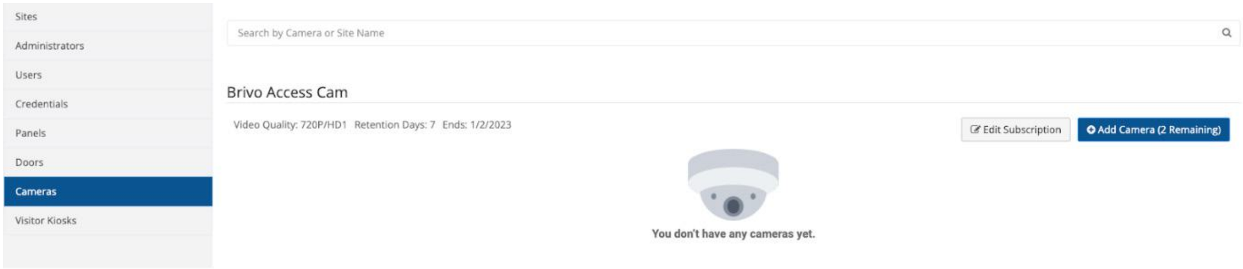


11. You are returned to the Customer Details page and the information added in the popup window is now present, as well as the number of available open camera slots.



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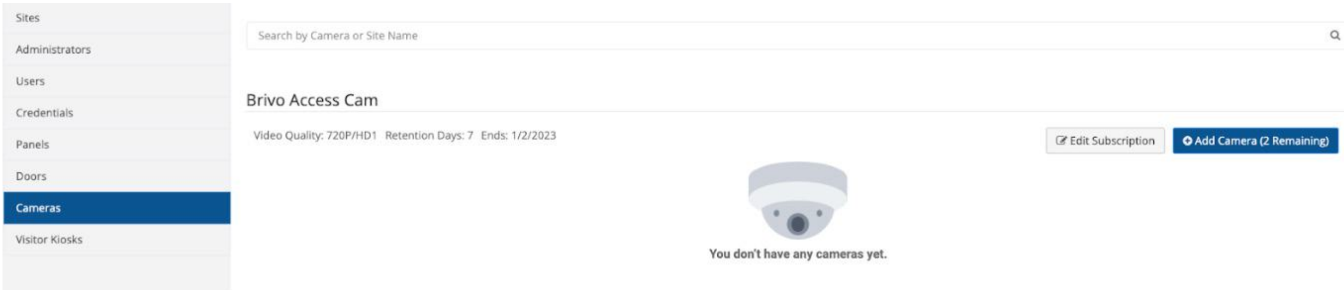
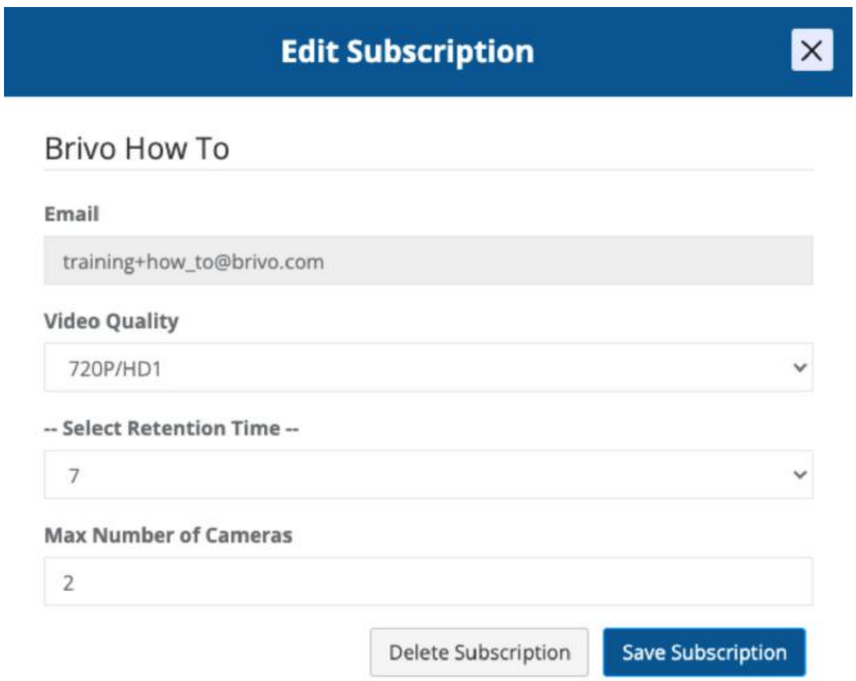
Editing a Brivo Access Cam Subscription

1. From the Customers Details page, click **Edit Subscription**.

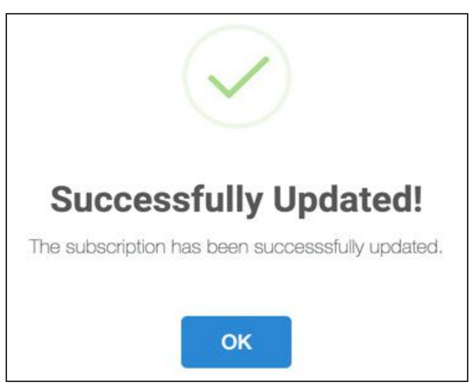


2. The **Edit Subscription** popup window appears.



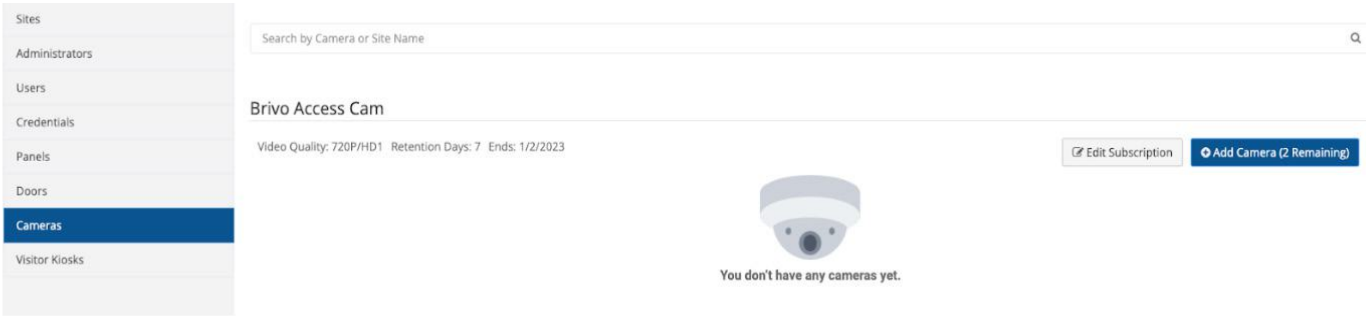
3. Adjust the Video Quality, Retention Time, and Max Number of Cameras as desired.

4. When finished, click **Save Subscription.**

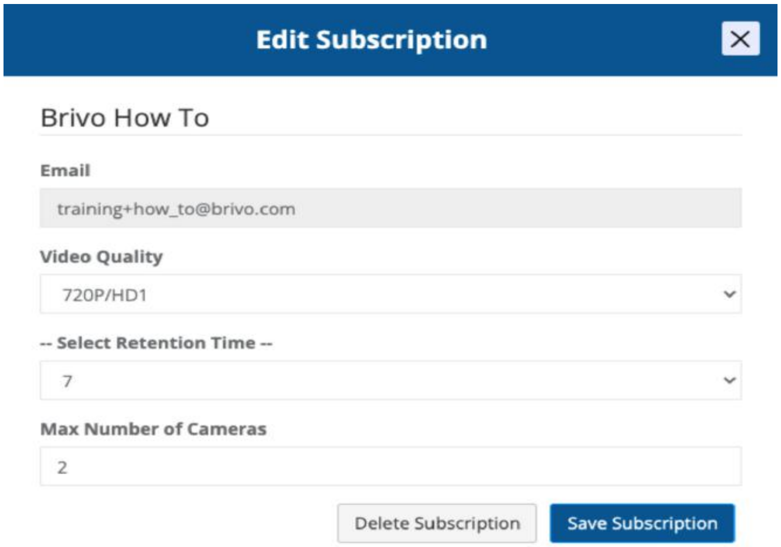


Deleting a Brivo Access Cam Subscription

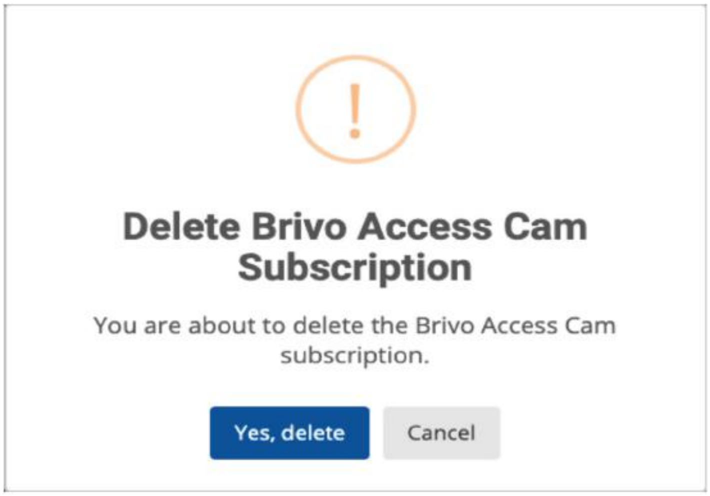
1. From the Customer Details page, click **Edit Subscription** and the Edit Subscription popup window appears.



2. Click on the **Delete Subscription** button.



3. Click on the **Yes, delete** button to confirm the deletion of the Brivo Access Cam subscription.



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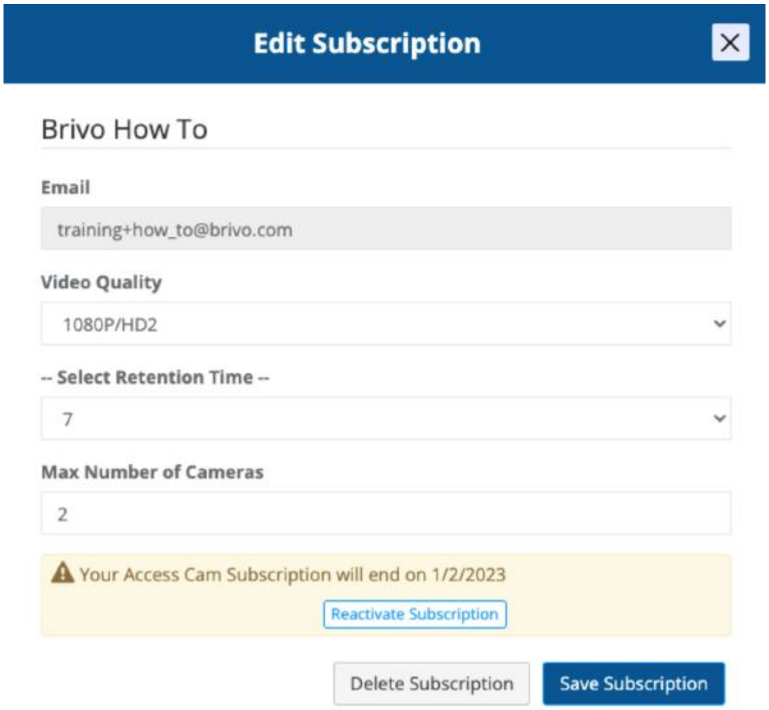
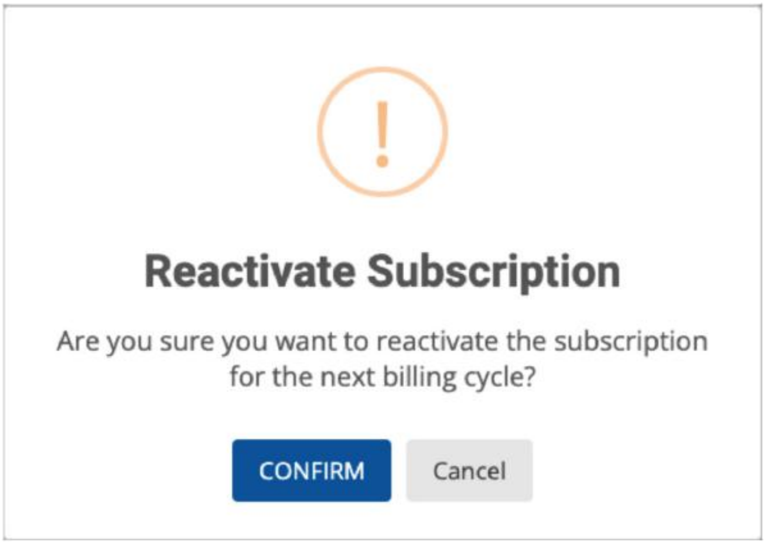
4. While you can no longer edit the subscription, you can reactivate it anytime during the billing cycle with the previous settings by clicking the **Edit Subscription** button, then clicking **Reactivate Subscription**.



5. In the pop-up window, confirm that you want to reactivate the Brivo Access Cam subscription by clicking **Confirm**. If you reactivate a Brivo Access Cam subscription after the billing cycle ends, you will need to set up the subscription as if it were new.



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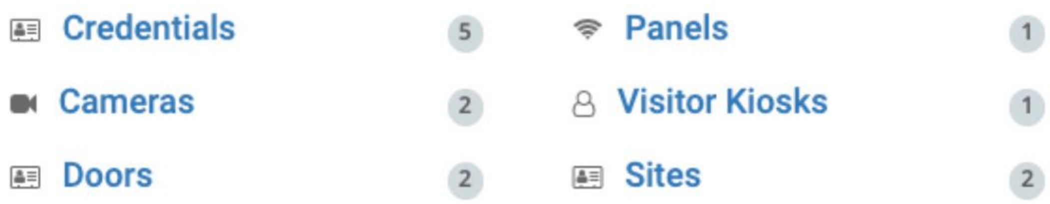
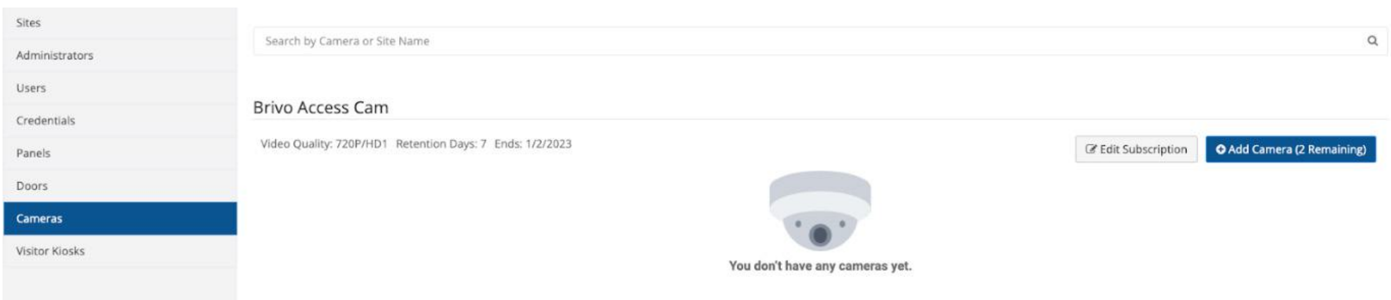
Using Partner Portal to Add and Delete Brivo Access Cameras

Adding a Camera

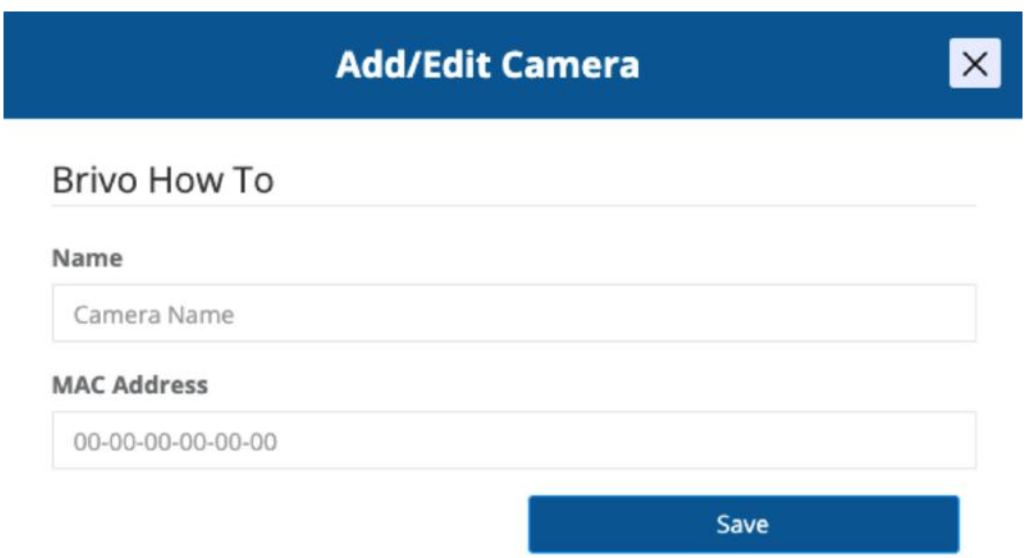
1. Log in to Partner Portal.
2. Click **Customers** on the left navigation bar.
3. Search for the customer you wish to add a Brivo Access Cam to and select the customer from the list.
4. In the Customer Summary, click on the **Cameras** link.



5. In the Brivo Access Cam section, click on **Add Camera**.



6. Enter the Camera Name and MAC address and click **Save Camera**.



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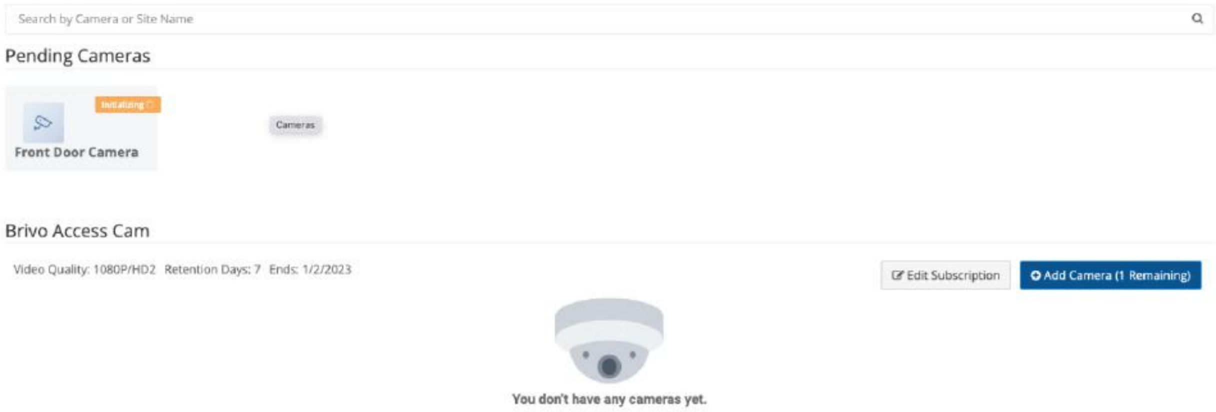
NOTE: The new camera takes anywhere from 30 seconds to three minutes to finish initializing. During this time, you will see the camera listed in the Pending Cameras section.



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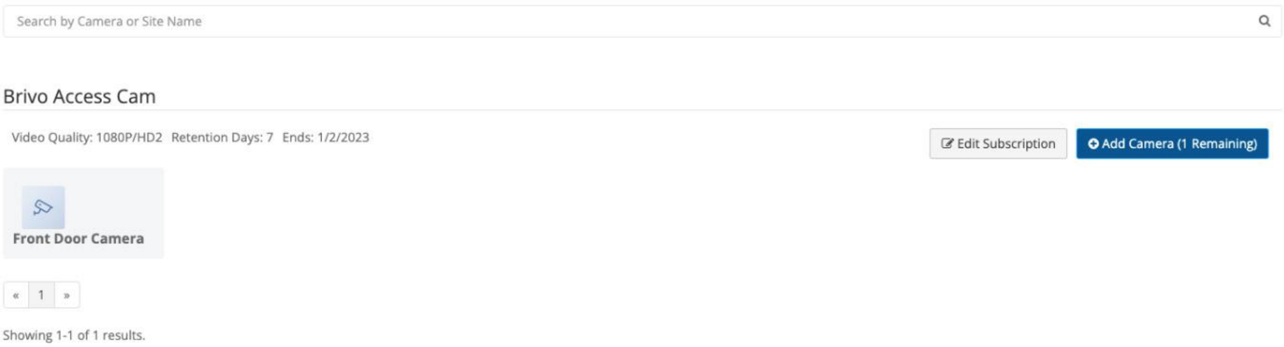
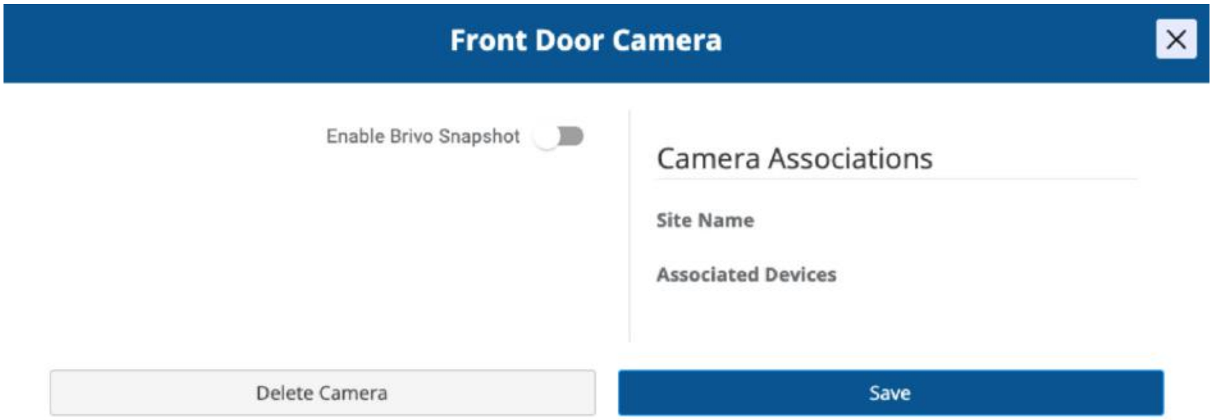
Deleting a Camera

1. Log in to Partner Portal.
2. Click **Customers** on the left navigation bar.
3. Search for the customer from which you wish to delete a Brivo Access Camera.
4. In the Customer Summary, click on **Cameras**.
5. In the Brivo Access Camera section, click on the camera tile for the camera you wish to delete.



6. Click **Delete Camera** and confirm that you wish to delete this camera.



NOTE: Once the camera is deleted, your available camera slots will increase by one.

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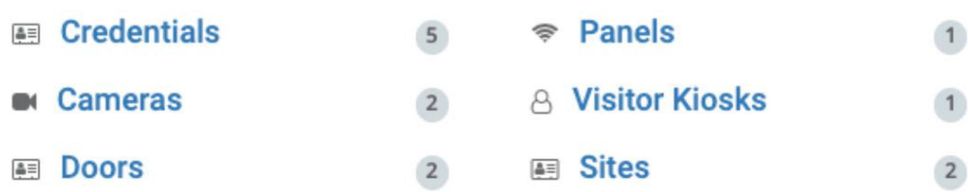
Brivo Snapshot

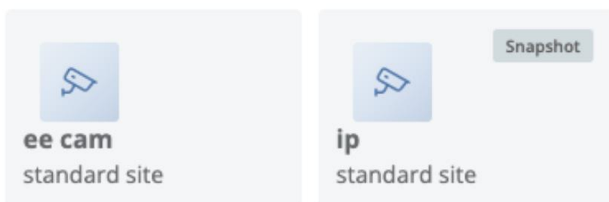
Enabling Brivo Snapshot on compatible cameras

This section provides a description of how you can enable or disable Brivo Snapshot and update Brivo Snapshot settings on a customer's camera using the Partner Portal.

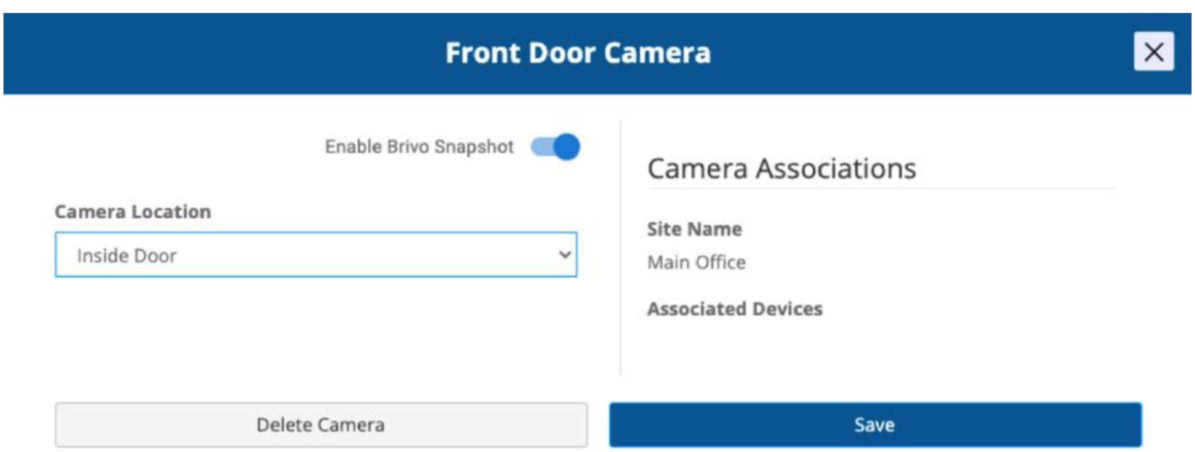
1. Log in to the Partner Portal.
2. Click on the **Customers** link on the left.
3. Select your customer from the list.
4. On the lower right hand side of the screen, the Summary box is visible. In that pane, the number of Cameras is shown.



5. Click on the **Cameras** link to view the Details page.
6. On the Details page, click on the Brivo Access Cam or Eagle Eye camera tile on which you wish to enable Brivo Snapshot.
    a. If Brivo Snapshot is already enabled, the camera tile will have a **Snapshot** label.



7. In the Camera popup window, the camera name will be listed at the top.
8. Change the Enable Brivo Snapshot indicator to true (blue).



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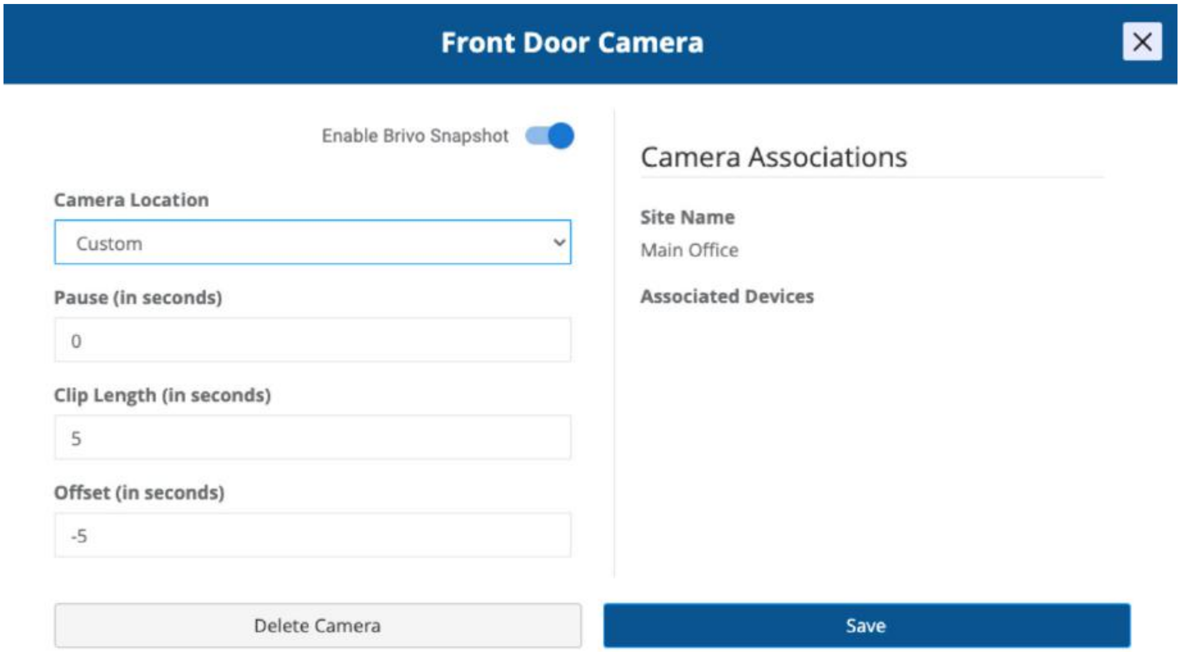
9. Change the Camera Location dropdown to Inside Door, Outside Door, or Custom.
    a. If set to Inside Door, the camera will be set to the recommended settings for cameras mounted inside of the door.
    b. If set to Outside Door, the camera will be set to the recommended settings for cameras mounted outside of the door.
    c. If set to Custom, you will be able to adjust the Pause Length, Clip Length, and Offset to your needs.
        i. Pause - Amount of time to wait before trying to get the clip from the camera. Generally set to 0 for Access Cams, and 1 or 2 for Eagle Eye. Pause can be set from 0 to 10 seconds.
        ii. Clip Length - Length of the clip being returned. Clip Length can be set from 0 to 30 seconds. The recommended setting for an indoor or outdoor camera is 5.
        iii. Offset - pre or post roll, in one value, the offset from when the event occurred as where we start the clip. If the camera is outside the door, example is -5 (seconds) as we would want the clips 5 seconds leading up to the event. For inside the door, 2 for 2 seconds after the event. Offset can be set from -10 to 10. The recommended setting for a camera mounted inside the door is 1. The recommended setting for a camera mounted outside the door is -5.



10. When finished, click **Save**.

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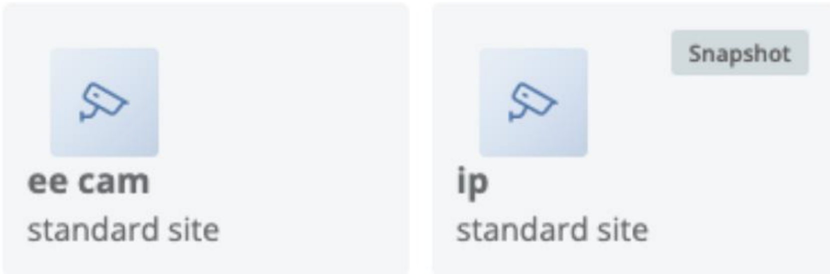
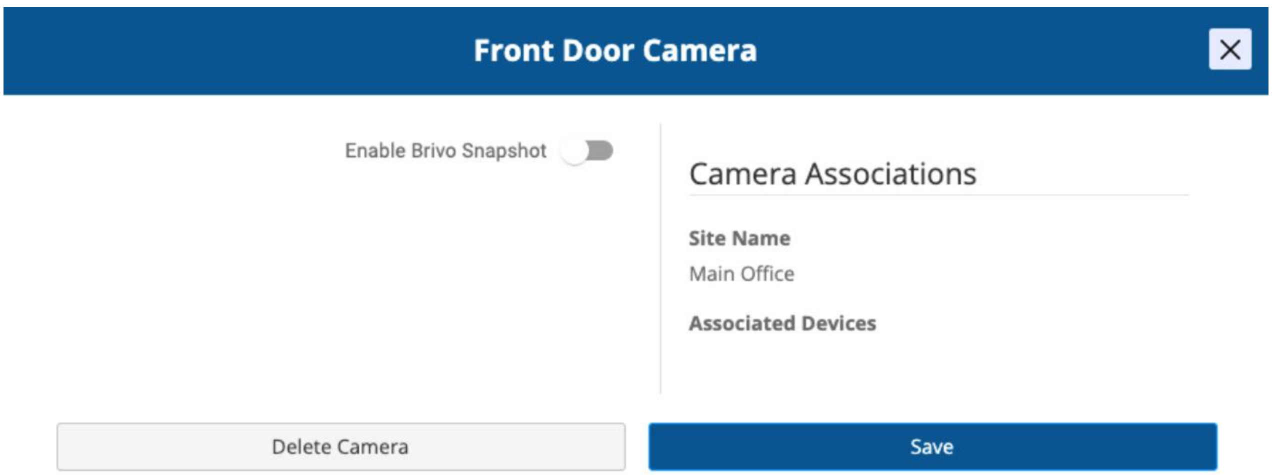
Disabling Brivo Snapshot on a camera

1. From the Camera Details page, click on the camera on which you wish to disable Brivo Snapshot.
    a. Cameras without a **Snapshot** label already have Snapshot disabled.



2. The Camera popup window will appear.
3. Change the Enable Brivo Snapshot indicator to false (grey).



4. When finished, click **Save**.

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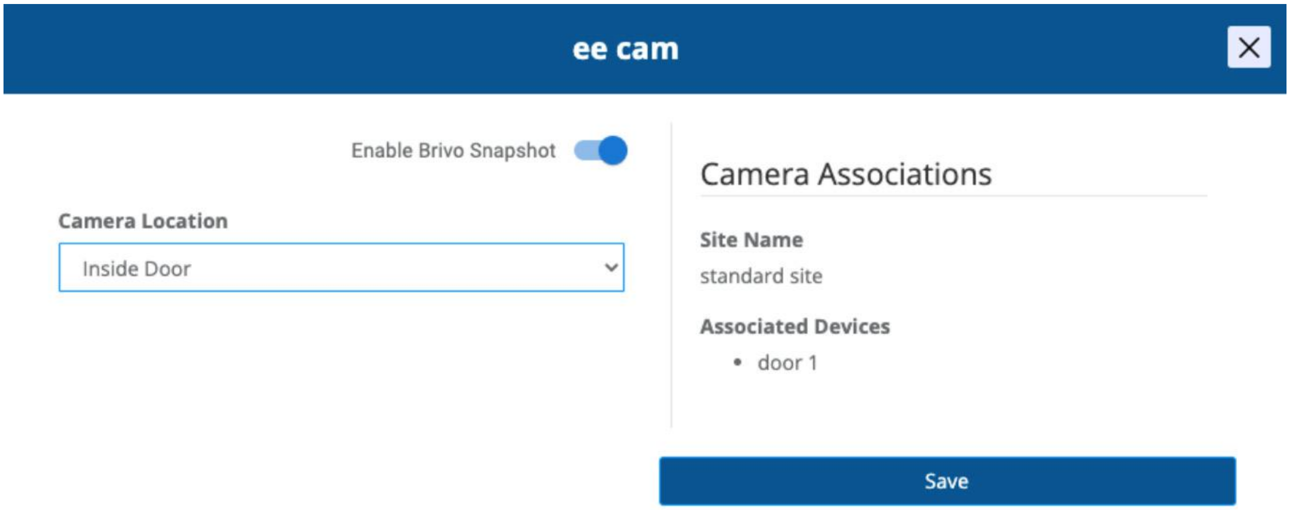
Brivo Snapshot Camera Associations

In order to view Snapshot images in Brivo Access, a device must be associated with the camera. To see if a device is associated with the camera, click on the Camera tile and view the camera associations. Device associations can be set up in Brivo Access.



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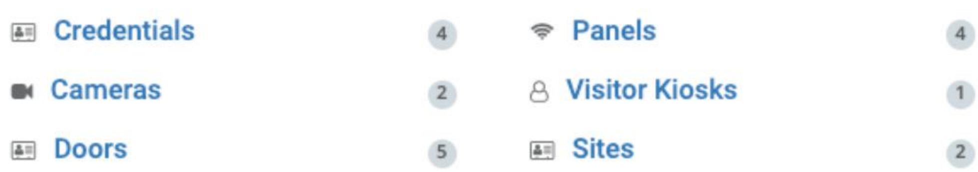
Firmware Updates

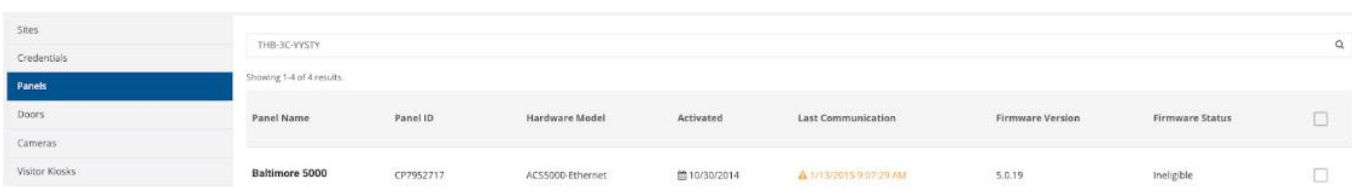
This section contains instructions for searching for control panels, viewing firmware release notes, and updating panel firmware.

Searching for a Customer's Control Panel

1. Log in to Partner Portal.
2. Click on the **Customers** link on the left.
3. Select your customer from the list.
4. On the lower right-hand side of the screen, the Summary box is visible. In that pane, the number of Panels is shown.



5. Click on the **Panels** link to view the Details page.
6. On the Details page, type the panel name or number in the **Search Bar** and press enter.



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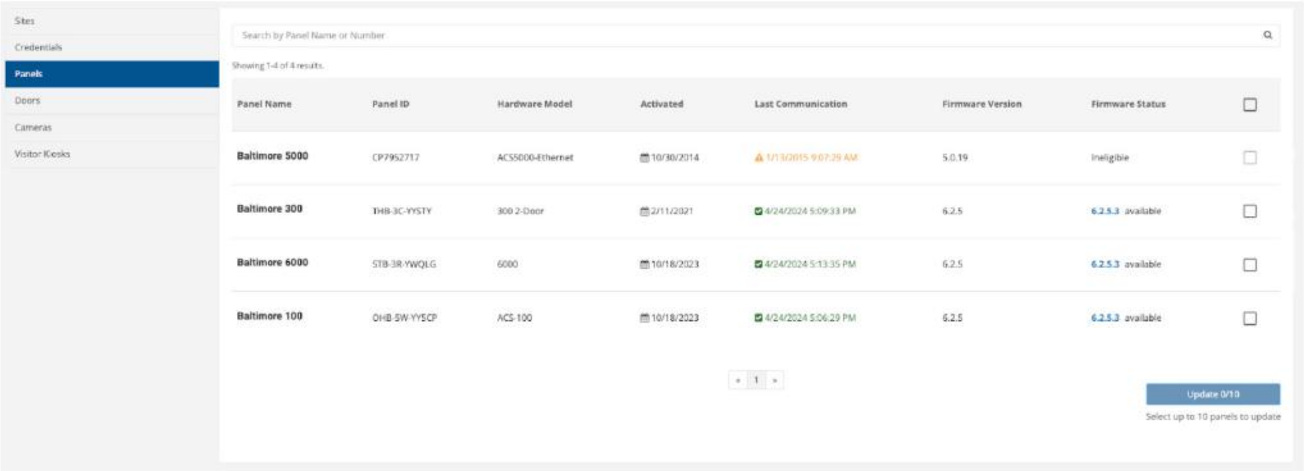
Viewing Control Panel Firmware Release Notes

1. On the Panel Details page, click on the version listed in the **Firmware Status** column.



2. In a separate tab, you can view the release notes for all firmware updates.

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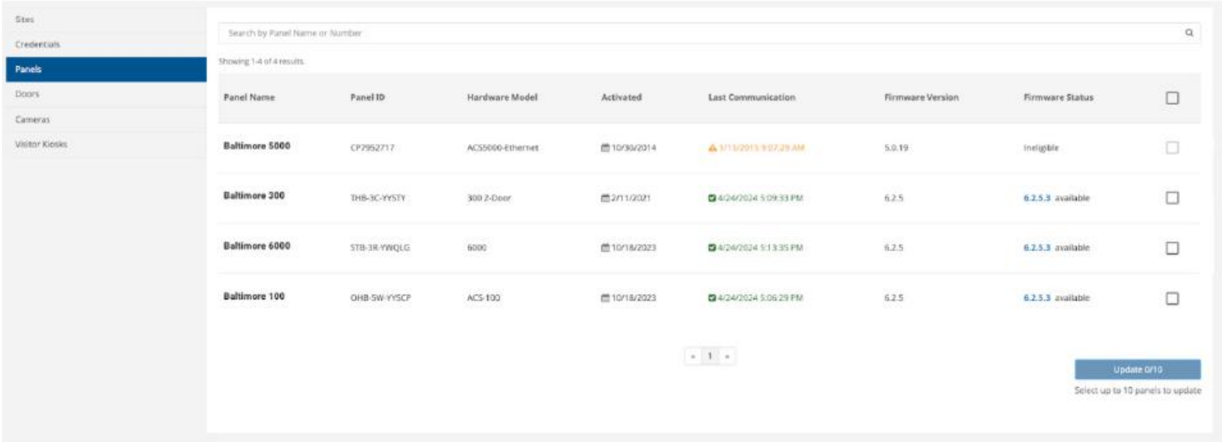
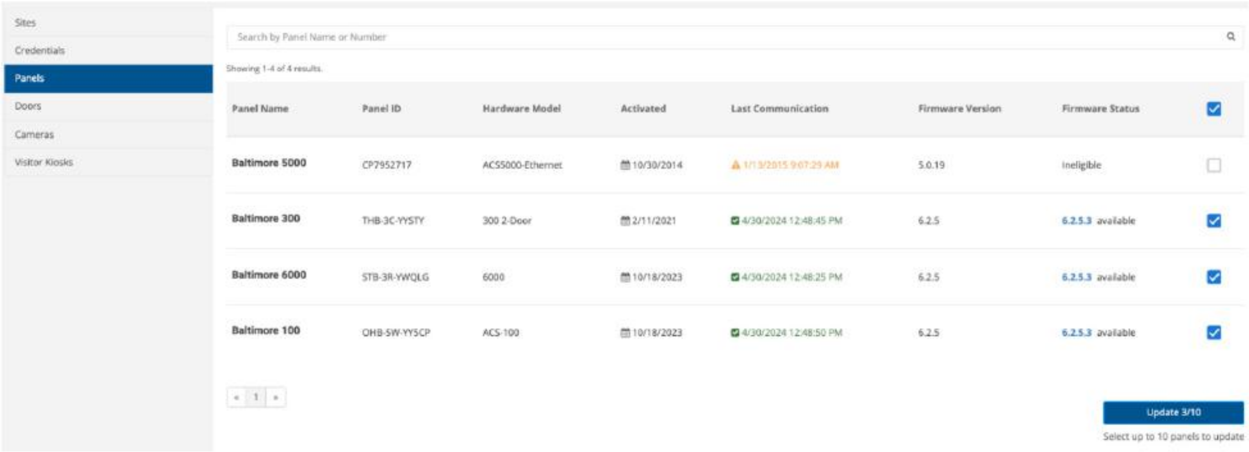
Updating Firmware on Customer Control Panels

1. On the Panel Details page, view the current firmware version and the firmware status columns. If there is an update available, it will be listed in the firmware status column.

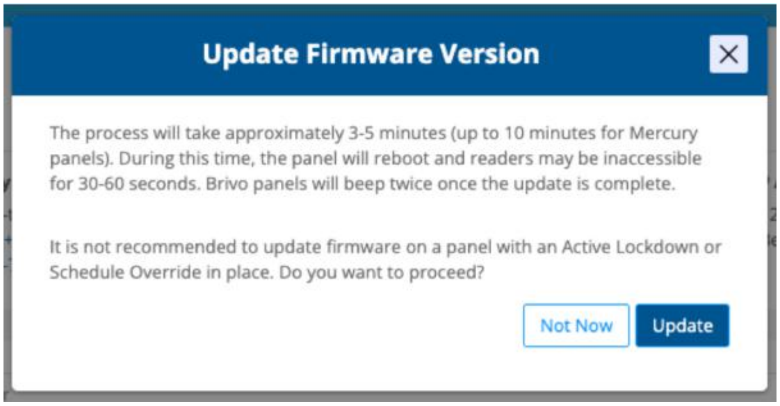


2. To update the firmware on a control panel, click the **Checkbox** for that panel. To update the firmware on multiple panels, click the checkboxes for up to 10 panels, or click the **Select All** box.

3. Click on the **Update** button. A pop-up confirmation message will appear.



4. On the confirmation message, click **Update** if you wish to proceed.



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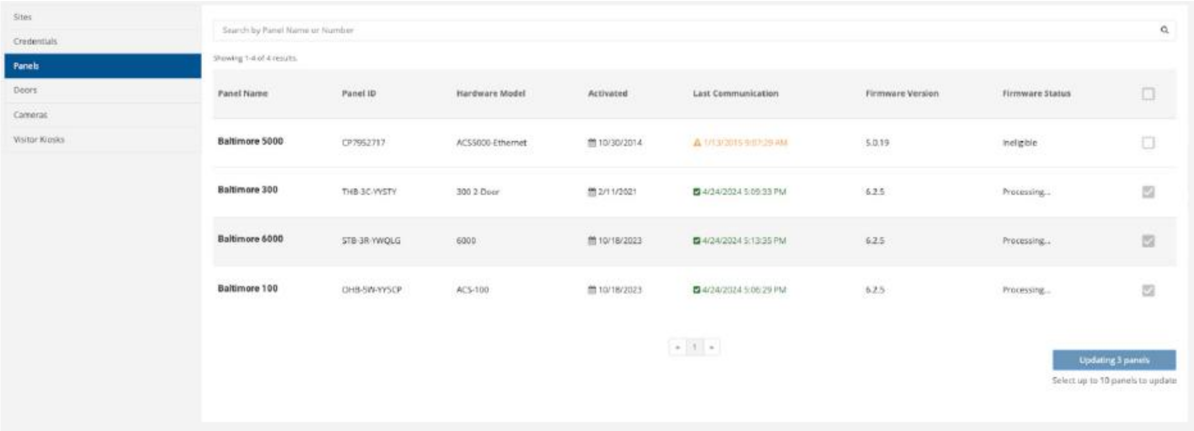
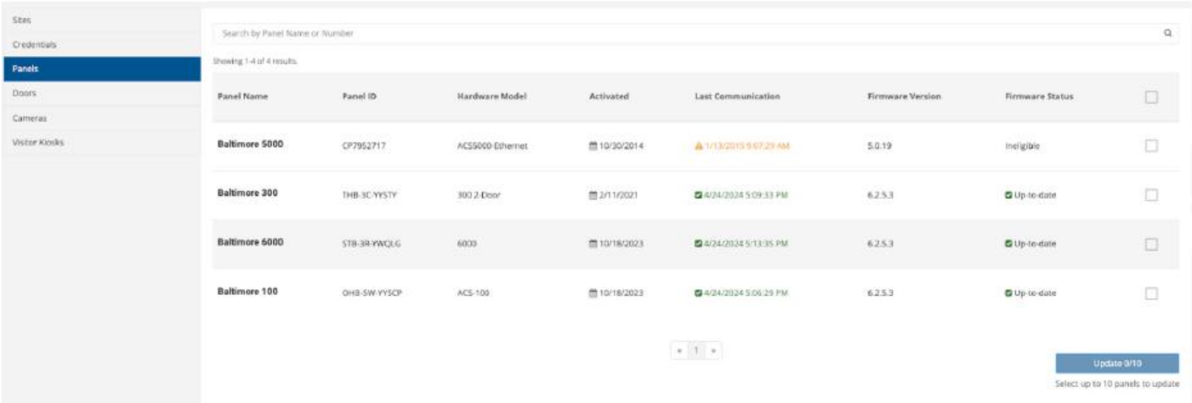
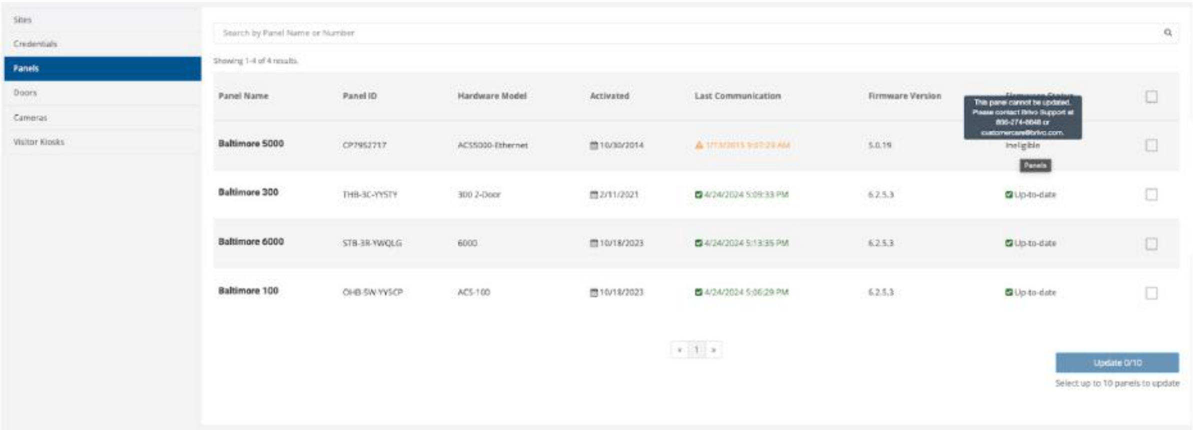
4. While the panels are updating, you will see **Processing** in the firmware status column.



5. When the update is complete, you will see **Up-to-date** in the firmware status column.



NOTE: Offline panels and legacy panels are not eligible to be updated via Partner Portal. Contact Brivo Technical Support for assistance with these panels.



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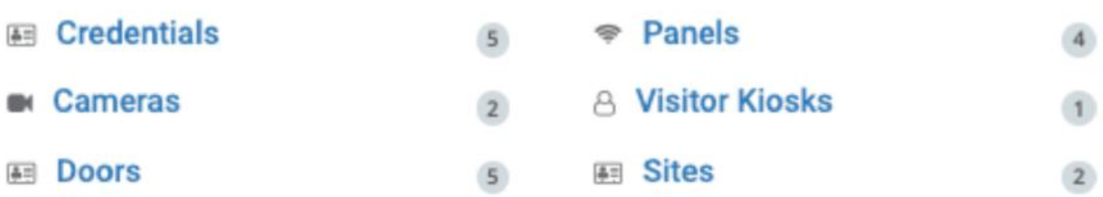
Control Panel Swap

This section contains instructions for swapping existing control panels on customer accounts with new control panels. This process allows you to replace a customer's panel without reprogramming any of the data.

Searching for a Customer's Existing Control Panel

1. Log in to Partner Portal.
2. Click on the **Customers** link on the left.
3. Select your customer from the list.
4. On the lower right-hand side of the screen, the **Summary** box is visible. In that panel, the number of panels is shown.
5. Click on the **Panels** link to view the Details page.
6. On the Details page, type the panel name or number in the **Search Bar** and press **Enter**.



Swapping Control Panels

1. On the Panel Details page, click on the panel that you wish to swap.
2. In the panel swap wizard, review the details of the existing panel. Then click the **Swap Panel** button.

3. Enter the Panel ID of the new control panel you want to swap and click **Next**.
4. Confirm all panel information is correct and click **Swap**.

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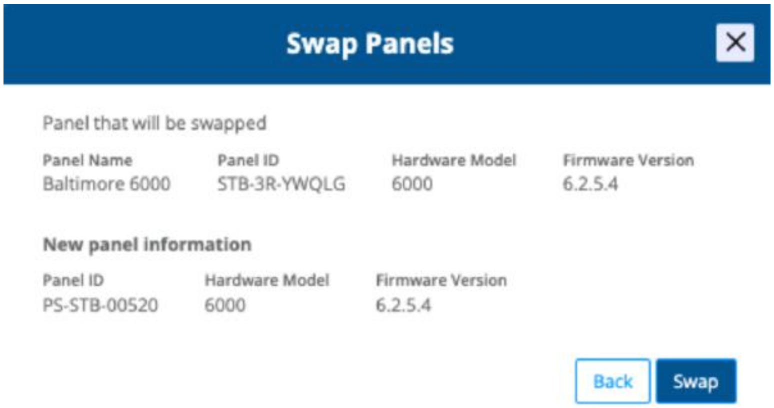

Panel Swap Compatibility

IMPORTANT NOTE: The following points must be followed in order for a panel swap to be successful.

- New control panels must not have firmware lower than existing firmware on the account.
- Panels in an active lockdown or emergency scenario are not eligible to be swapped. Deactivate the scenario to proceed with a panel swap.
- Please see the below matrix to confirm which panels can be swapped.

Existing Panel	New Panel
IPDC-2	ACS300 v1
	ACS300 v2
ACS5000	ACS6000 v1
	ACS6000 v2
ACS100	ACS100
ACS300 v1	ACS300 v1
	ACS300 v2
ACS300 v2	ACS300 v2
ACS6000 v1	ACS6000 v1
	ACS6000 v2
ACS6000 v2	ACS6000 v2
Single Door Controller	Single Door Controller

Panel Swap Compatibility Matrix

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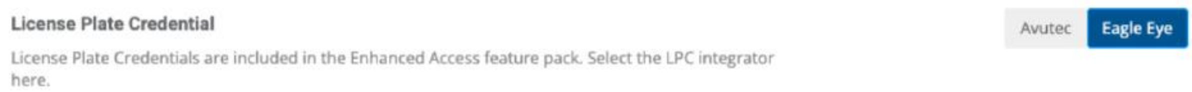
License Plate Credentials

This section describes how you can manage the License Plate Credential (LPC) feature on your customer's account.

NOTE: The LPC setting is enabled on any account subscribed to the Enhanced Access feature pack. The video integrator will be defaulted to Eagle Eye Networks. To change the video integrator, follow the below instructions.

1. Search for the customer account and click on Settings in the customer summary pane.
2. Scroll down to the License Plate Credential section.
3. Make the required change to the LPC setting.
    a. To enable the setting, select the appropriate integrator.
    b. To change the integrator, select the appropriate integrator.
    c. To disable the setting, click **Disabled**.



4. Click **Save Changes** at the bottom of the screen.

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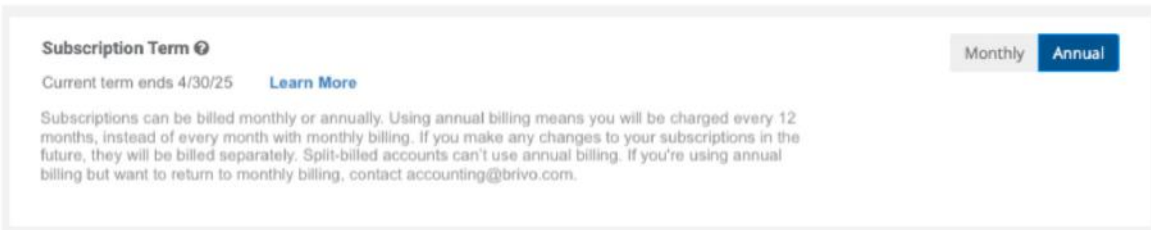
Subscription Terms

Customer's recurring subscriptions can be billed on a monthly or annual basis. By default, you will be billed monthly. When this setting is changed to annual, you will be billed every 12 months based on the current configuration. Any changes made to a customer's subscription in the future will be billed separately. Split-billed accounts are not eligible for annual billing. Once an account is changed to annual billing, you will not be able to switch back to monthly billing without contacting our accounting department at accounting@brivo.com.

This section describes how you can change a customer's subscription terms.

1. Search for the customer account and click on **Settings** in the customer summary pane.
2. Scroll down to the Subscription Terms section.
3. Click the **Annual** button.



4. Click **Save Changes** at the bottom of the screen.

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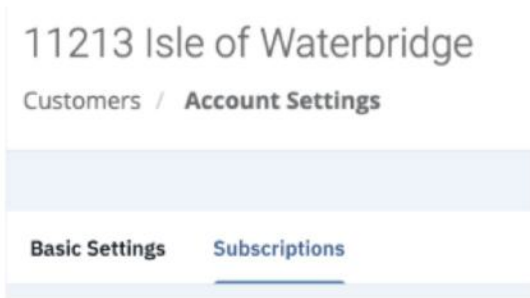
Brivo Editions and Feature Packs

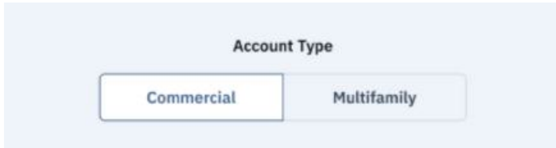
This section provides a description of how you can update a customer's Brivo Edition and manage Feature Packs.

NOTE: An **Edition** in Brivo is a version of software with various features tailored for different use cases and user needs. A **Feature Pack** in Brivo is a set of additional features that can be added to an edition to improve functionality and extend the capabilities of an edition.

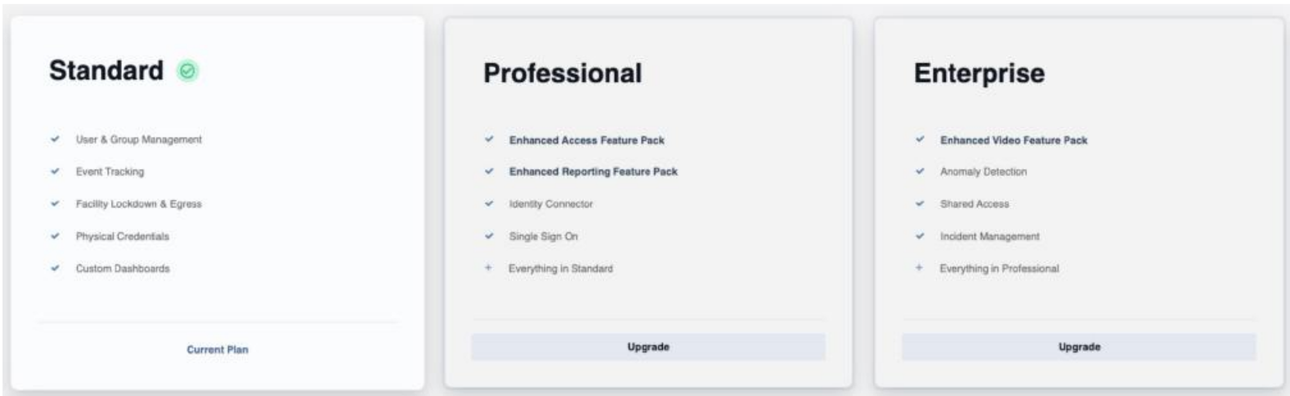
1. Click on **Settings**.
2. Click on **Subscriptions**.



3. Select the **Account Type** (Commercial or Multifamily).



4. Select the **Edition** or click on **Compare Subscriptions** to review an edition comparison.



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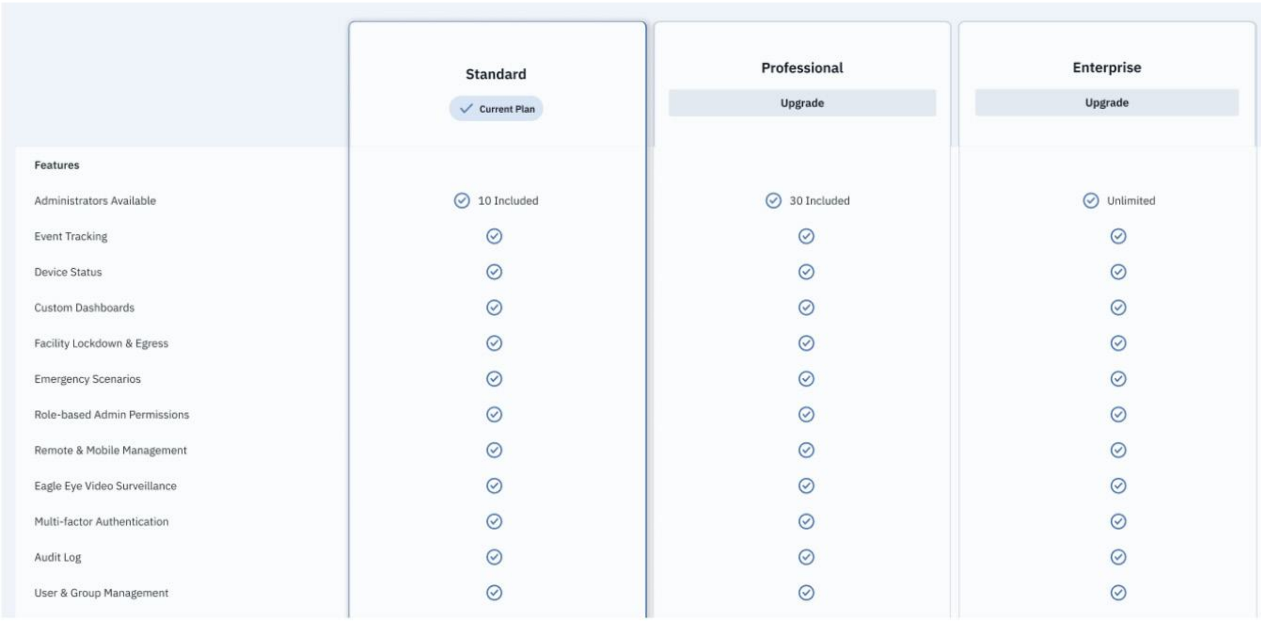
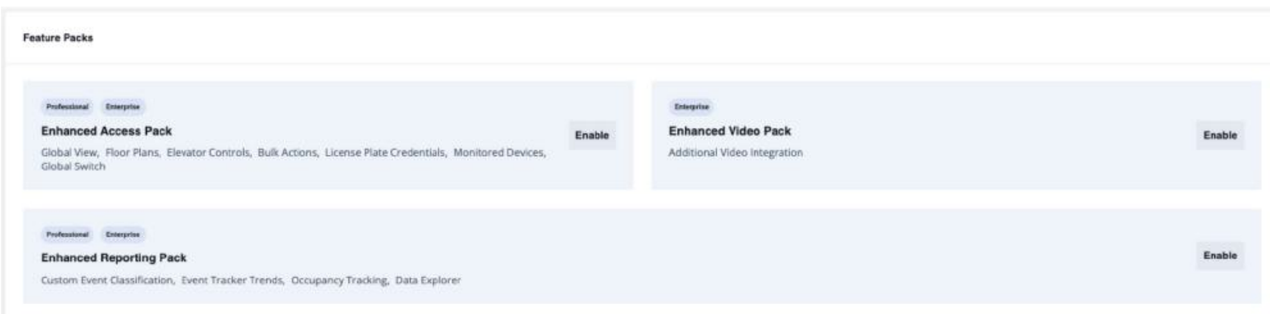


5. In the **Feature Pack** section, select the desired feature packs.



6. Click **Save Changes**.

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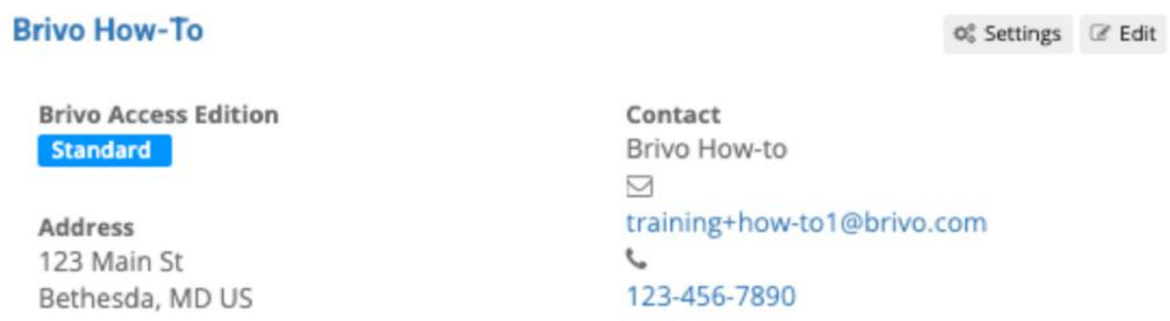
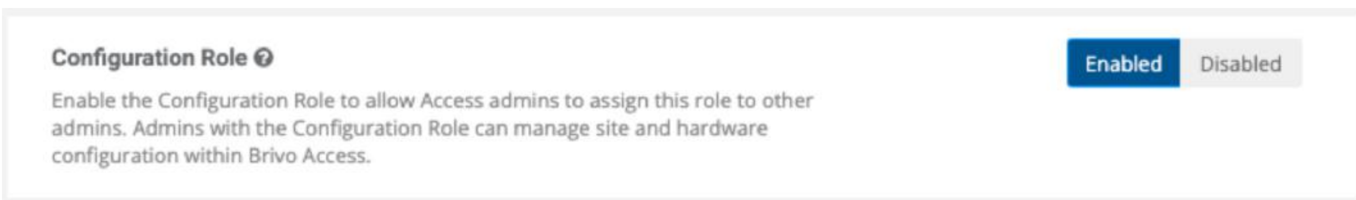
Configuration Role

This section describes how you can enable the Configuration Role on a customer account. Accounts with the Configuration Role enabled will be able to assign the role to end-user admins on the account. Admins with the Configuration Role can manage panels, sites, doors, and other hardware on the account.

1. Search for the customer account and click on **Settings** in the customer summary pane.



2. Scroll down to the **Configuration Role** section.
3. Click on the **Enabled** button.



4. Click at the bottom of the screen.

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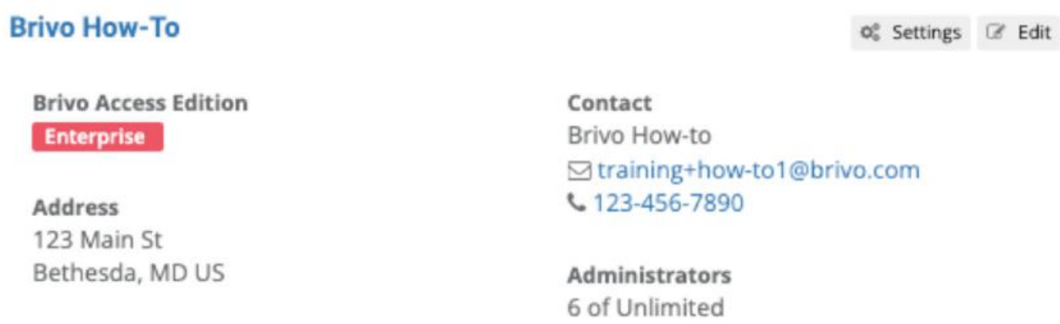
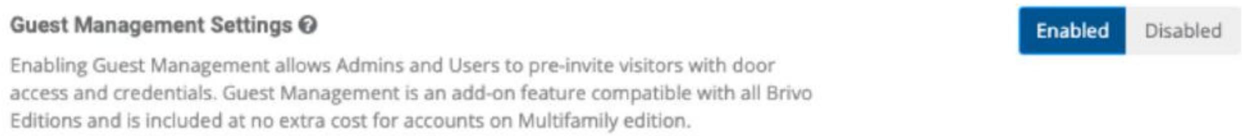
Guest Management

This section describes how you can enable the Guest Management feature on a customer account. Guest Management is enabled by default for accounts on Multifamily edition. For all other editions, the feature can be enabled for a monthly subscription fee. Accounts using the Shared Access feature in Brivo Access are not eligible to use Guest Management at this time.

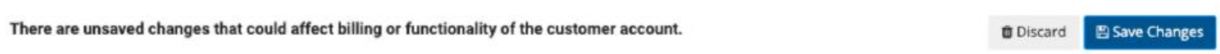
1. Search for the customer account and click on Settings in the customer summary pane.



2. Scroll down to the Guest Management section.
3. Click on the **Enabled** button.



4. Click **Save Changes** at the bottom of the screen.



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Manage Admin Limits

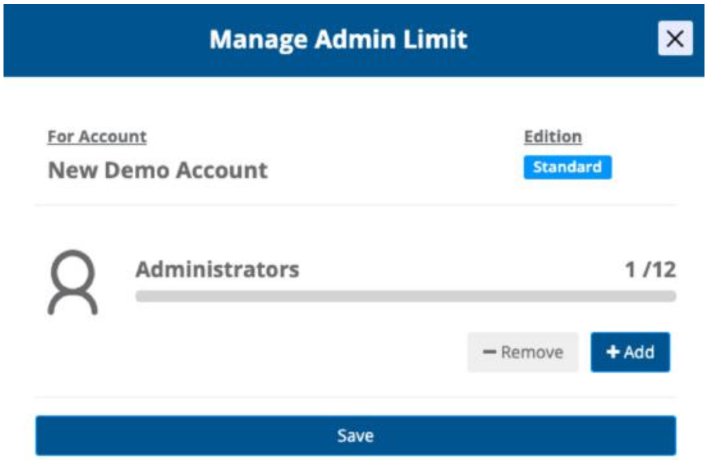
This section provides instructions to manage administrator limits on a customer account using Partner Portal. Accounts created prior to September 1, 2022 do not have administrator limits. Accounts created on or after September 1, 2022 have administrator limits based on their edition (see below).

- Standard - 10 admins
- Multifamily - 30 admins
- Professional - 30 admins
- Enterprise - Unlimited admins

You can manage the admin limit on your customer account to increase the number of administrators they can create.

1. Log in to the Partner Portal.
2. Click on the Customers link on the left.
3. Select your customer from the list.
4. In the **Summary** section, click on the **Manage Limits** button.

5. A pop-up window will appear.



6. Use the **Add** or **Remove** buttons to select the new admin limit and click **Save**.
7. You have successfully updated the admin limit on your customer's account. The order will be reflected on the next monthly invoice.

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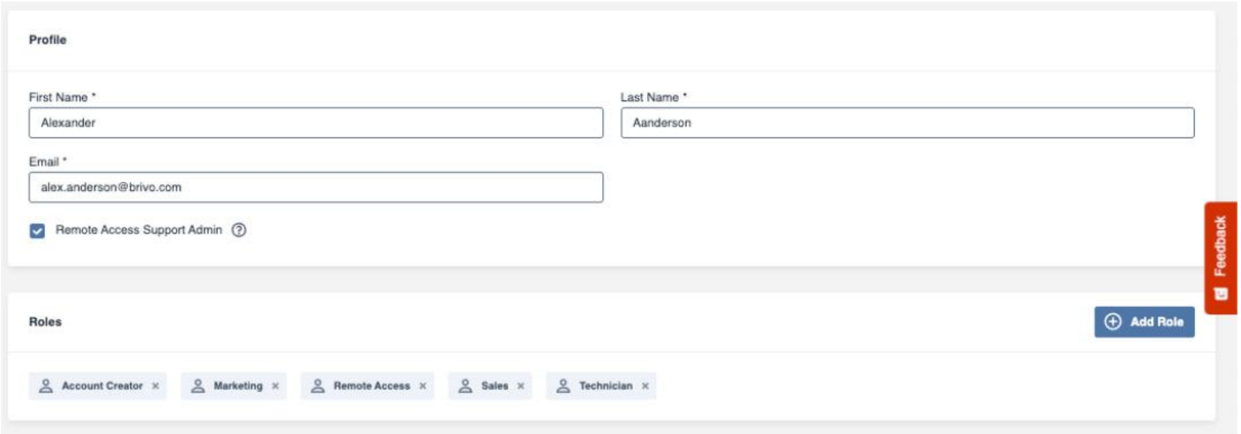
Remote Access

This section provides a description of how you can set up Remote Access assignments and use Remote Access.

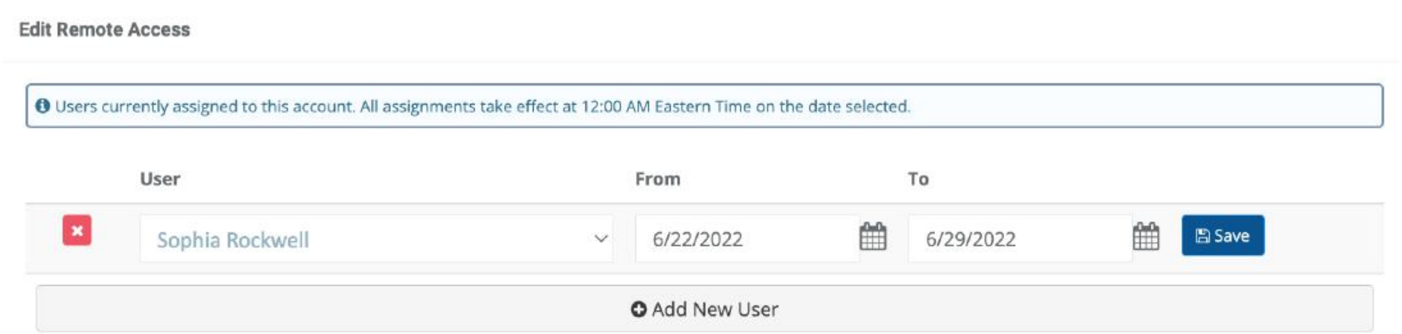
Adding Remote Access Assignments

1. First, make sure that the Portal User that you wish to set up an assignment for has the Remote Access role.



2. Click on the **Customers** link on the left.
3. Select your customer from the list.
4. On the upper right hand side of the screen, click on the **Settings** link.

5. Scroll down to the Edit Remote Access section. Click on Add New User and select the Portal User that you wish to assign to this account. Select the time frame that the user should be able to remotely access this account and click Save.



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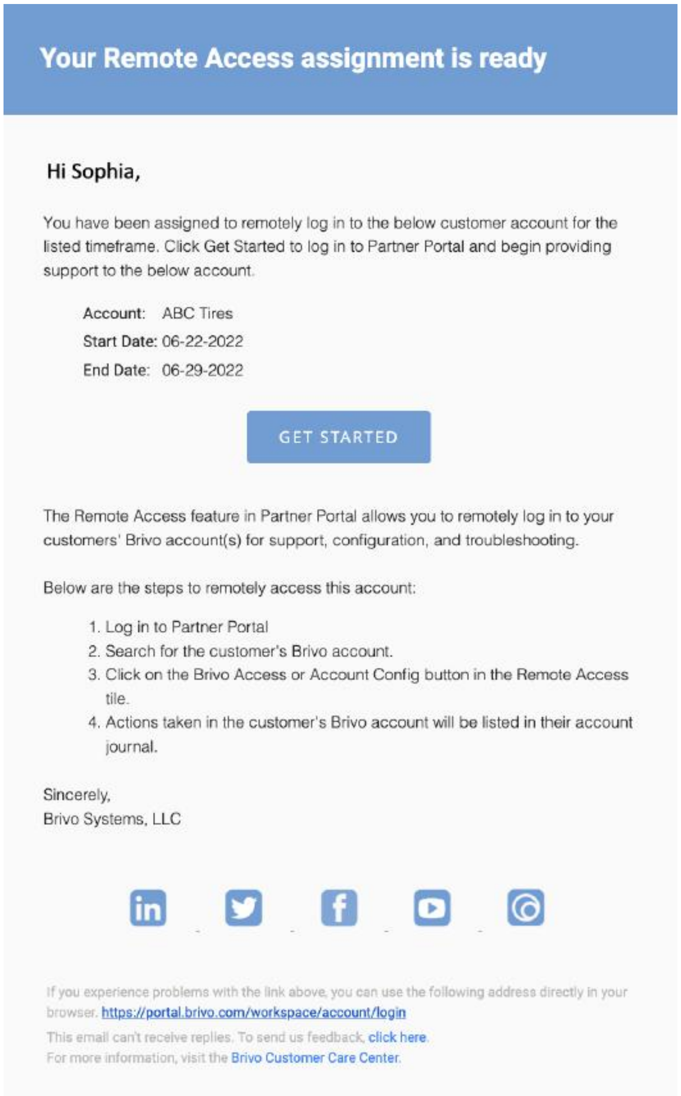
6. To delete the Remote Access assignment, click the red X. To edit the Remote Access time frame, make the necessary changes and click **Save**.

7. Once the new assignment has been created, the Portal User will receive an email with details about the account and Remote Access time frame, with some instructions on how to use the new Remote Access feature.



Your Remote Access assignment is ready

Hi Sophia,

You have been assigned to remotely log in to the below customer account for the listed timeframe. Click Get Started to log in to Partner Portal and begin providing support to the below account.

Account: ABC Tires
Start Date: 06-22-2022
End Date: 06-29-2022

GET STARTED

The Remote Access feature in Partner Portal allows you to remotely log in to your customers' Brivo account(s) for support, configuration, and troubleshooting.

Below are the steps to remotely access this account:

1. Log in to Partner Portal
2. Search for the customer's Brivo account.
3. Click on the Brivo Access or Account Config button in the Remote Access tile.
4. Actions taken in the customer's Brivo account will be listed in their account journal.

Sincerely,
Brivo Systems, LLC

If you experience problems with the link above, you can use the following address directly in your browser. https://portal.brivo.com/workspace/account/login
This email can't receive replies. To send us feedback, click here.
For more information, visit the Brivo Customer Care Center.

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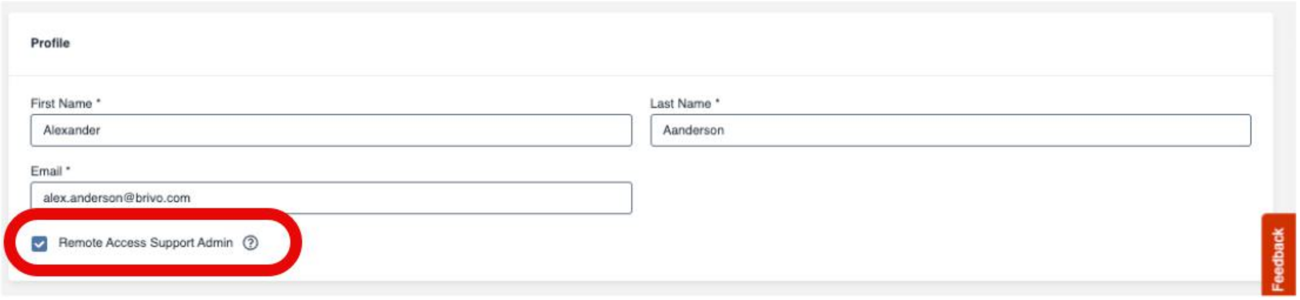
Bypass Remote Access Assignments

Portal Users with the Subscription Owner and Account Creator role can set other Portal Users to bypass Remote Access assignments. Portal Users with this setting will not need a Remote Access assignment. They can gain access to any customer account that has the Remote Access feature enabled in Brivo Access.

1. On the Left Navigation bar, click on **Portal Users**.
2. Search for the name of the Portal User to whom you wish to give this permission.
3. Click the **View** link for the Portal User you wish to update.
4. Click the **Remote Access Support Admin** checkbox.
5. Click **Save Changes.**



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Using Remote Access

1. Click on the **Customers** link on the left.
2. Select your customer from the list.
3. In the Account Administrators section, view the **Remote Login** tile.
4. To remotely access the customer's account in Brivo Access, you may either click on the **Brivo Access** button or the **Account Config** button, depending upon what parts of the account you need to access.

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Additional Data Retention

This section provides a description of how you can manage Additional Data Retention on a customer account.

Increasing or Decreasing Data Retention

1. Log in to the Partner Portal.
2. Click on the Customers link on the left.
3. Select your customer from the list.
4. In the **Summary** section, click on the **Settings** link.
5. On the **Settings** page, scroll to the Event Data Retention section.
6. Use the slider to select the number of years of data this account should retain.

7. Click **Save Changes** at the bottom of the page.

8. You have successfully updated the data retention on your customer's account. The order will be reflected on the next monthly invoice.

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Revision Table

Version	Date	Content
1.0	09/13/2018	Original document
1.1	03/25/2019	Added Role Based Permissions Chapter
1.2	06/05/2019	Added Customers Chapter with CP search and Adding BMPs
1.3	10/16/2019	Updated screenshot on Page 3 to reflect addition of Message Center
1.4	11/20/2019	Updated screenshot on Page 3 to reflect changes to Account Summary, updated screenshot on Page 11 and table on Page 15 to reflect addition of Brivo Visitor, and added Brivo Visitor section
1.5	3/31/2020	Added Brivo Onair Cam subscription functionality
1.6	5/26/2020	Updated BMP functionality, added Reseller Account Settings chapter, added update Customer Details section
1.7	6/24/2020	Updates to permissioning
1.8	10/20/20	Added Brivo Editions
1.9	03/18/21	Added Technician Role
1.10	05/05/21	Replaced Brivo Onair Cam references with Brivo Access Cam
1.11	07/06/21	Added Brivo Snapshot
1.12	07/30/21	Updated Brivo Snapshot functionality
1.13	11/02/21	Updated login process, updated screen-shots on pages 2 and 19
1.14	06/27/22	Added Remote Access functionality
1.15	08/10/22	Removed Onair references
1.16	01/18/23	Major revisions to UI
1.17	04/05/23	Updated Remote Access functionality
1.18	07/27/23	Updated Partner Portal functionality for Brivo Visitor and various screenshots
1.19	11/14/23	Added Brivo Wallet Pass, Managing Admin Limits, Additional Data Retention, and updated various screenshots
1.20	02/13/24	Removed CP Search and added Firmware Updates

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Revision Table Continued

Version	Date	Content
1.21	05/09/24	Added Reporting Dashboard, License Plate Credentials, Subscription Terms, anc Customers. Updates to Brivo Wallet Pass and Firmware Updates.
1.22	07/25/24	Added Control Panel Swap functionality
1.23	11/08/24	Added Custom Roles, Site Management, and Guest Management and updated Managing Digital Credentials
1.24	03/03/25	Added Feature Pack details and updated Account Sign-In and Account Creation
1.25	05/07/25	Added Enhanced Reporting Feature Pack and Configuration Role details

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