

# Viewing Customer Information on the Dashboard

When you log into BoldNet as a Customer, the following “Dashboard” view displays:

The screenshot shows the BoldNet Customer Dashboard for 'YANNA - Yanna's Account'. The interface is divided into several sections:

- Customer Dashboard:** A summary section with links to 'My Information', 'My Contact List', 'Call Lists', 'My Alarm Systems', 'Monitoring Services', 'Alarm Activity Log', 'Data Maintenance Issues', 'Run a Report', and 'My User Settings'.
- Put Customer on Test:** A form with fields for 'Reason', 'Duration' (Hours and Minutes), and a 'Put on test' button. It also shows 'On Test Status' as 'Full' and a 'Refresh' button.
- Customer Status:** A summary of the customer's status, including 'Alarm Monitoring', 'Maintenance Service', and 'Event Monitoring' for four areas.
- Activity Log:** A table showing a list of activities with columns for 'Date' and 'Log Description'. The table is sorted by date and includes a 'Refresh' button.

The “Customer Dashboard” includes the following three windows: “Put Customer on Test”, “Customer Status”, and “Activity Log”.

## Viewing and Editing Customer Information on the Customer Information Window

From the “Customer Dashboard”, click the “My Information” option from the Navigation area as shown in the following screenshot:



**Result:** the Customer account displays as shown in the following screenshot:

**YANNA - Yanna's Account** [Edit](#) **Customer**

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**Name and Address**

**Name** Yanna's Account  
**Template**  
**Status** Monitored  
**Type** Commercial  
**Street1** 3115 1st Division  
**Street2**  
**City** Fort Seade **State** Maryland **Zip Code** 20751  
**Cross Street** Cooper Avenue and 1st division **Subdivision** Meese Forest  
**Country** United States of America  
**Language** English (United States) **A/R Company**  
**Time Zone** Eastern Time (US & Canada) **A/R Number**

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**Contact Information**

▷ **Site** (987) 221-3132  
▷ **Home** (320) 322-3645  
▷ **Business** (987) 321-3212  
▷ **Mobile** (654) 322-3213  
▷ **E-Mail** yanna@boldgroup.com **Format:** PDF  
**Web Address** http://www.boldgroup.com

▷ **Comments**

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**Passwords**

▷ **Password** GENERAL  Is this a duress password?  
▷ **Password** DURESS  Is this a duress password?  
▷ **Password** PDA  Is this a duress password?  
▷ **Password** TEST  Is this a duress password?  
▷ **Password** TEST2  Is this a duress password?

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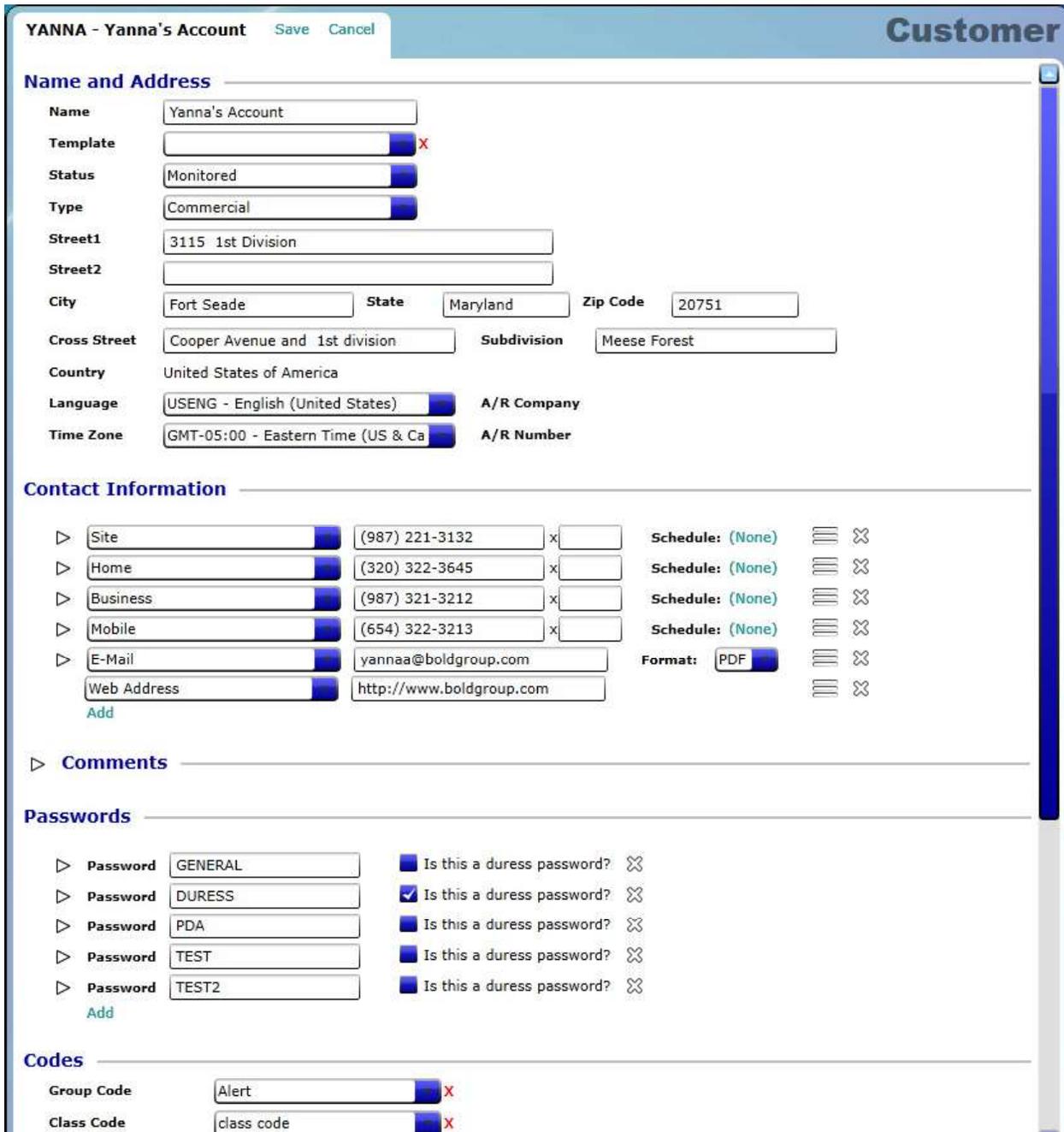
**Codes**

**Group Code** Alert  
**Class Code** class code  
**Monitoring Group** Monitoring Group 0

If you want to edit Customer information included on the “My Information” window, click the “Edit” link as shown in the following screenshot:



**Result:** the Customer information on the form now displays as follows:



**YANNA - Yanna's Account** Save Cancel **Customer**

**Name and Address**

Name: Yanna's Account  
Template: [dropdown] x  
Status: Monitored  
Type: Commercial  
Street1: 3115 1st Division  
Street2: [empty]  
City: Fort Seade State: Maryland Zip Code: 20751  
Cross Street: Cooper Avenue and 1st division Subdivision: Meese Forest  
Country: United States of America  
Language: USENG - English (United States) A/R Company: [empty]  
Time Zone: GMT-05:00 - Eastern Time (US & Ca) A/R Number: [empty]

**Contact Information**

Site	(987) 221-3132	x	Schedule: (None)
Home	(320) 322-3645	x	Schedule: (None)
Business	(987) 321-3212	x	Schedule: (None)
Mobile	(654) 322-3213	x	Schedule: (None)
E-Mail	yanna@boldgroup.com		Format: PDF
Web Address	http://www.boldgroup.com		

Add

**Comments**

**Passwords**

Password	GENERAL	Is this a duress password?
Password	DURESS	Is this a duress password?
Password	PDA	Is this a duress password?
Password	TEST	Is this a duress password?
Password	TEST2	Is this a duress password?

Add

**Codes**

Group Code: Alert x  
Class Code: class code x

Edit any text you want, and then click **“Save”**.

# Viewing and Editing a Contact List

Contact Lists are both viewable and editable from the BoldNet Customer context.

Perform the following steps to view and edit a Contact List in the Customer context:

1. From the “Customer Dashboard” view, select “My Contact List” from the Navigation area as shown in the following screenshot:



**Result:** the following Contact List window displays:

**YANNA - Yanna's Account** [Edit](#)
**Customer**

**Search/Filter Contact List**

Name

**Contact**

▷ <b>Keyholder</b>	Contact Six		
▷ <b>Keyholder</b>	Contact Five	<b>Site</b> (654) 321-2227	
▷ <b>Keyholder</b>	Contact One	<b>Site</b> (654) 321-1222	<b>Home</b> (654) 326-3216
▷ <b>Keyholder</b>	Contact Two	<b>Site</b> (874) 222-3213	
▷ <b>Keyholder</b>	Contact Three	<b>Site</b> (321) 646-2226	
▷ <b>Keyholder</b>	Contact Four	<b>Mobile</b> (968) 732-2222	
▷ <b>Contact</b>	PDA Contact		
▷ <b>Contact</b>	TESTING		
▷ <b>Contact</b>	test 2		
▷ <b>Keyholder</b>	BoldNet Customer		
▷ <b>Contact</b>	Global Gym	<b>Site</b> (987) 463-5226	<b>Home</b> (654) 261-3213
▷ <b>Keyholder</b>	Amy Condon1	<b>E-Mail</b> amyc@anywhere.com	<b>Site</b> (719) 593-6226

**Customer**

▷ <b>Commercial</b>	Yanna's Account	<b>Site</b> (987) 321-3132	<b>Home</b> (320) 342-3645
▷ <b>Residential</b>	Yanna Two	<b>Site</b> (987) 321-3132	<b>Home</b> (320) 342-3645

**Branch**

▷	SeaWorld	<b>Site</b> (719) 456-1226	<b>Home</b> (456) 235-7726
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**Agency**

▷ <b>Guarding</b>	George Is A Monkey	<b>Site</b> (876) 321-3226	<b>Home</b> (654) 316-9876
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**Authority**

▷ <b>Police</b>	Colorado Springs	<b>Site</b> (719) 533-1126	<b>Business</b> (719) 654-6321
▷ <b>Fire</b>	Colorado Springs	<b>Site</b> (000) 026-0911	
▷ <b>Medical</b>	Medical	<b>Site</b> (911) 222-3326	

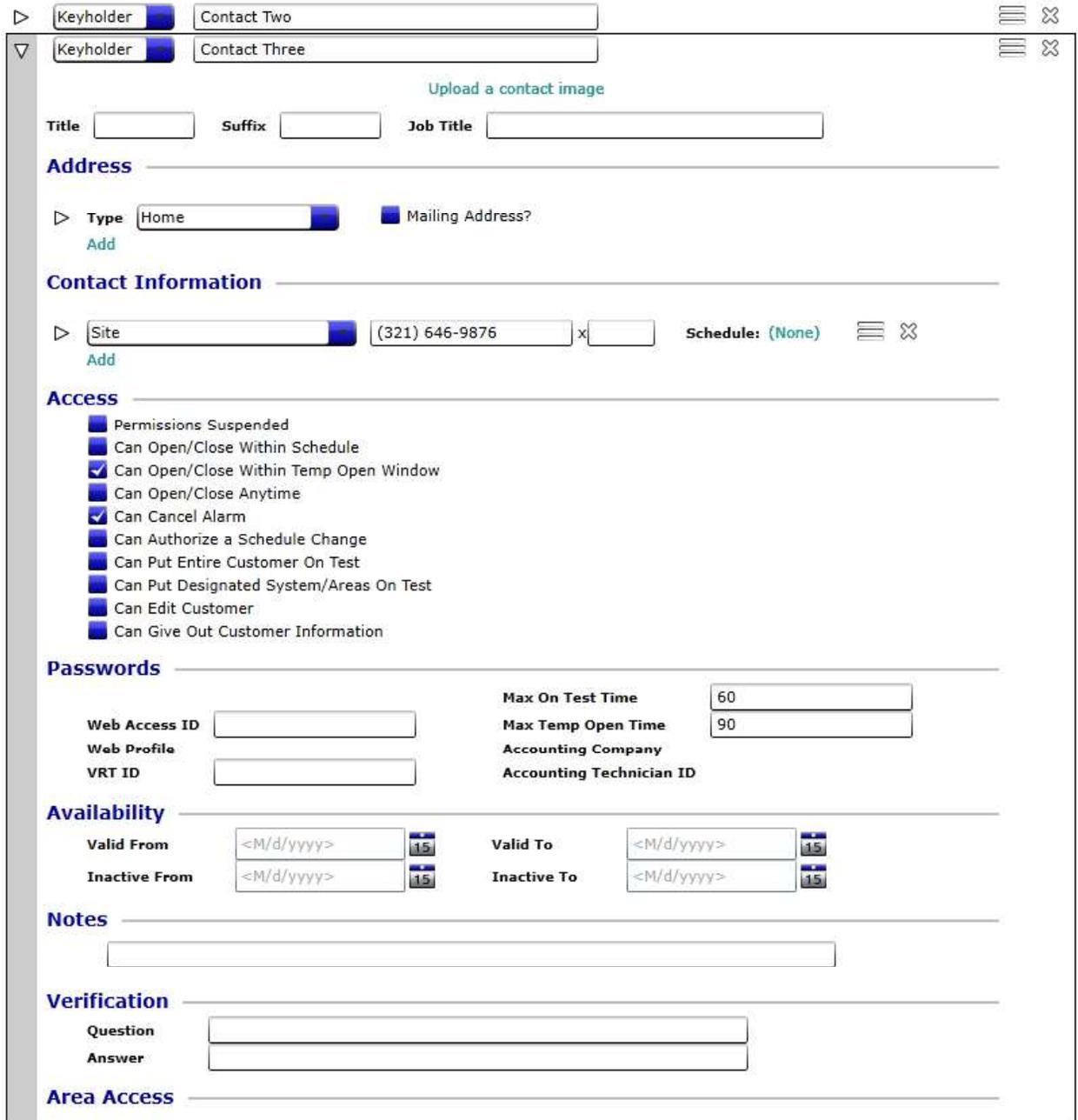
- Click the arrow icon to expand the Contact you want to view or edit.  
**Result:** the entry displays expanded as shown in the following screenshot:

▶	<b>Keyholder</b>	Contact Two	<b>Site</b>	(874) 321-3216
▽	<b>Keyholder</b>	Contact Three	<b>Site</b>	(321) 646-9890
<b>Title</b> <b>Suffix</b> <b>Job Title</b>				
<b>Address</b>				
▶	<b>Type</b>	Home		Mailing Address?
<b>Contact Information</b>				
▶	<b>Site</b>	(321) 646-9216		
<b>Access</b>				
	Can Open/Close Within Temp Open Window			
	Can Cancel Alarm			
<b>Passwords</b>				
	<b>Web Access ID</b>		<b>Max On Test Time</b>	60
	<b>Web Profile</b>		<b>Max Temp Open Time</b>	90
	<b>VRT ID</b>		<b>Accounting Company</b>	
			<b>Accounting Technician ID</b>	
<b>Availability</b>				
	<b>Valid From</b>		<b>Valid To</b>	
	<b>Inactive From</b>		<b>Inactive To</b>	
<b>Notes</b>				
<b>Verification</b>				
	<b>Question</b>			
	<b>Answer</b>			
<b>Area Access</b>				
▶	<b>System</b>	Event Monitoring		Allowed? <b>User ID</b>
	<b>Area</b>	Area 1		Allowed? <b>User ID</b>
	<b>Area</b>	Area 2		Allowed? <b>User ID</b> 3
	<b>Area</b>	Area 3		Allowed? <b>User ID</b>
	<b>Area</b>	Area 4		Allowed? <b>User ID</b>
▶	<b>Keyholder</b>	Contact Four	<b>Mobile</b>	(968) 732-2222
▶	<b>Contact</b>	PDA Contact		
▶	<b>Contact</b>	TESTING		

3. If you want to edit the Contact you selected, click “Edit” as shown in the following screenshot:



**Result:** the Contact you selected for editing now displays as shown in the following screenshot:

A screenshot of a web form for editing a contact. The form is titled "Contact Two" and is part of a "Keyholder" account. It features several sections: "Address" with fields for Title, Suffix, and Job Title; "Contact Information" with a Site dropdown, a phone number field containing "(321) 646-9876", and a Schedule dropdown set to "(None)"; "Access" with a list of permissions, some of which are checked; "Passwords" with fields for Web Access ID, Web Profile, VRT ID, Max On Test Time (60), Max Temp Open Time (90), Accounting Company, and Accounting Technician ID; "Availability" with Valid From, Valid To, Inactive From, and Inactive To date pickers; "Notes" with a text area; "Verification" with Question and Answer fields; and "Area Access" at the bottom. The form is styled with a light blue and white color scheme and includes expand/collapse icons for each section.

4. Edit any information on the Contact form you want to modify.

- If you want to add a new Contact, click the “Add” link under the bottom Contact listing as shown in the following screenshot:



**Result:** the “Add Keyholder” window displays as shown in the following screenshot:



- Enter a name into the “Name” field.
- If you want, modify the default values for country, language, and time zone in the appropriate fields.
- When you finish entering information on the “Add Keyholder” window, click “OK”.

**Result:** the Contact you added now displays on the “My Contact List” form as shown in the following screenshot:



- If you want to add information to your new Contact, expand the listing and make any edits you want.
- Click “Save”.

# Viewing and Editing a Call List

Call Lists are both viewable and editable from the BoldNet Customer context.

Perform the following steps to view and edit a Call List in the Customer context:

1. From the “Customer Dashboard” view, select “Call Lists” from the Navigation area as shown in the following screenshot:



**Result:** the following Call Lists window displays:



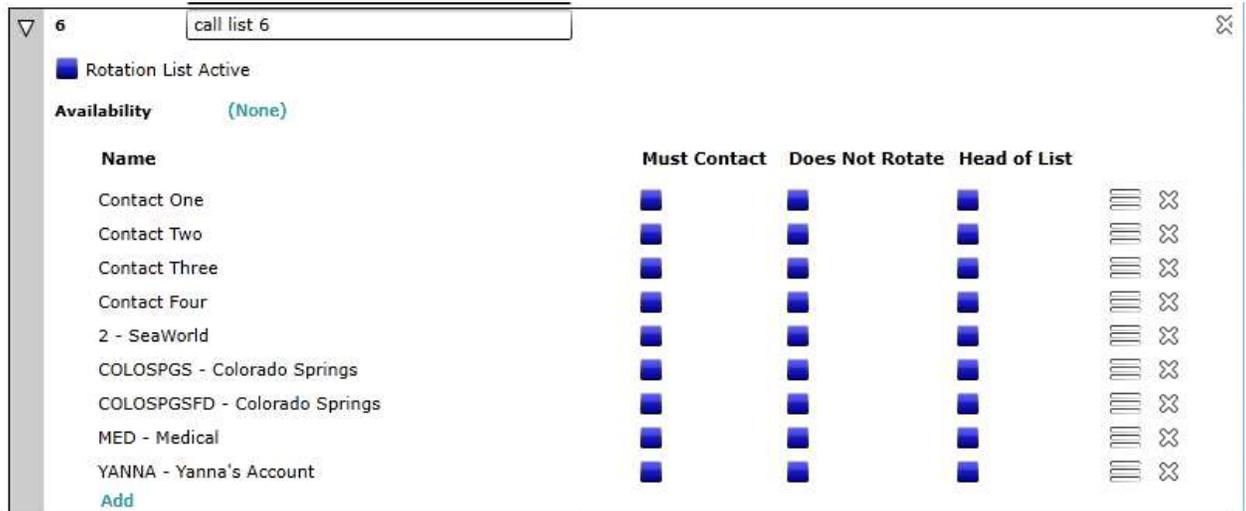
- To view a Call List, click the arrow icon next to the Call List entry to expand it.  
**Result:** the Call List entry displays expanded as shown in the following screenshot:



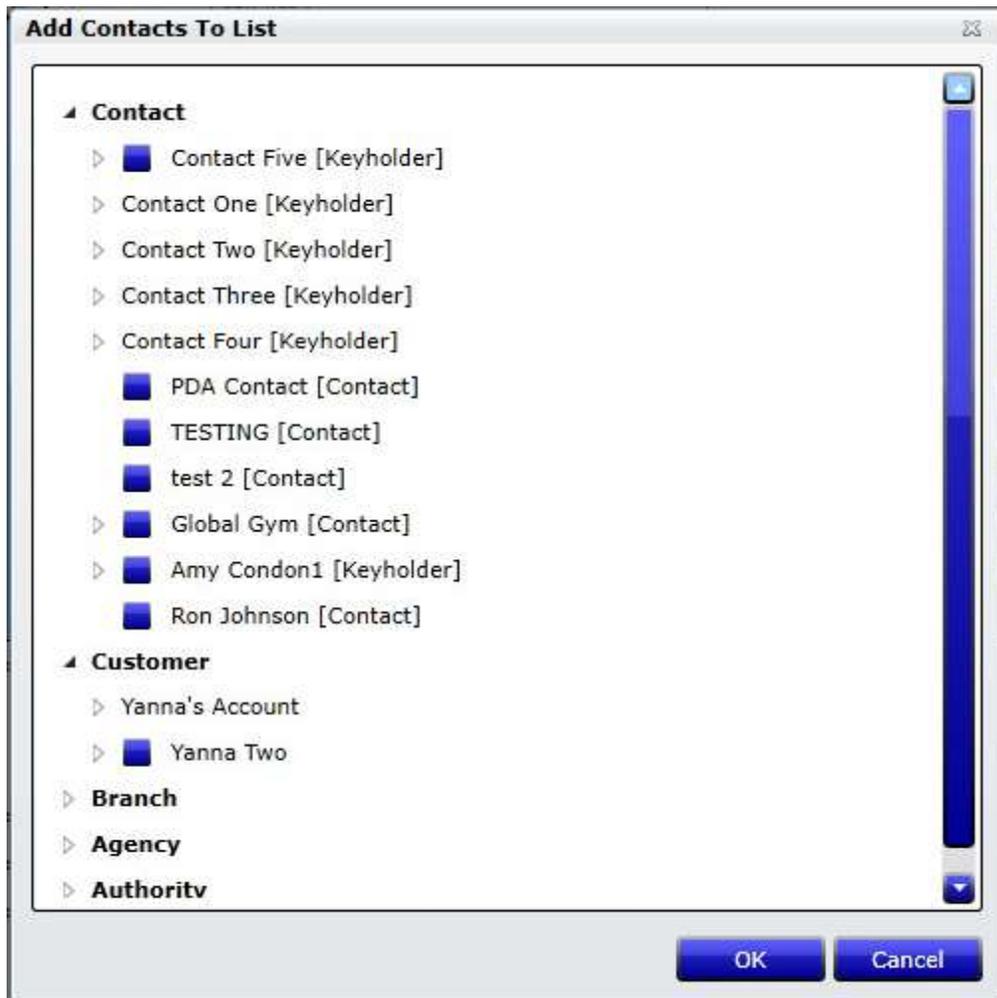
- If you want to edit the Call List entry, click “Edit” as shown in the following screenshot:



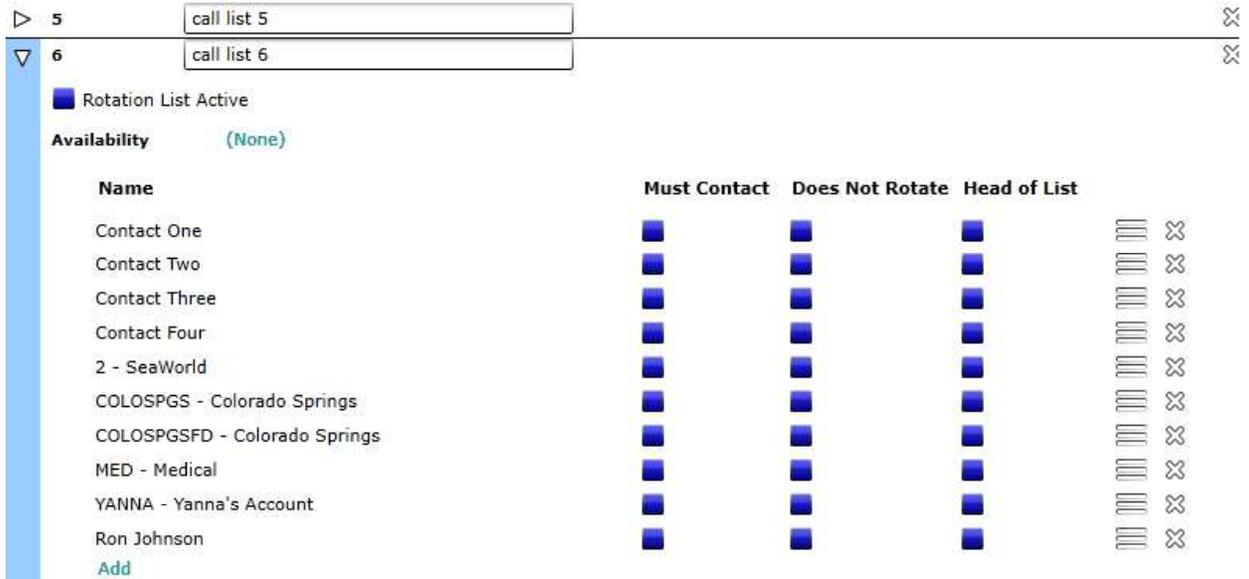
**Result:** the Call List you expanded now displays as shown in the following screenshot:



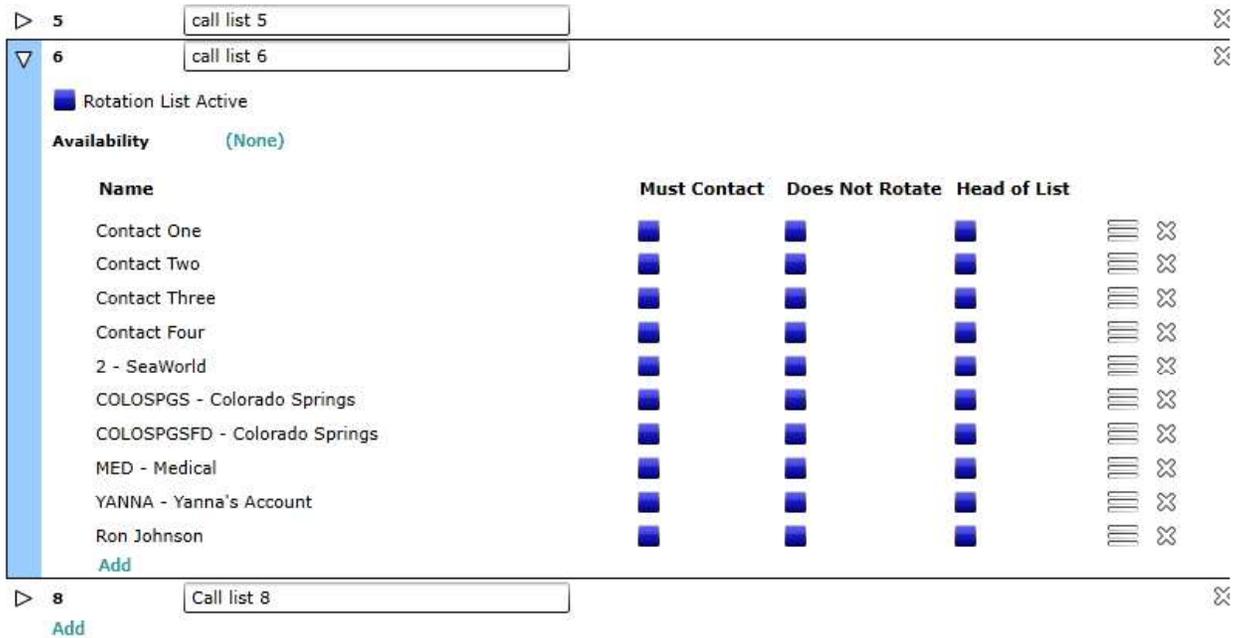
4. If you want to add a Contact to the Call List you selected for editing, click “Add”.  
**Result:** the “Add Contacts to List” window displays as shown in the following screenshot:



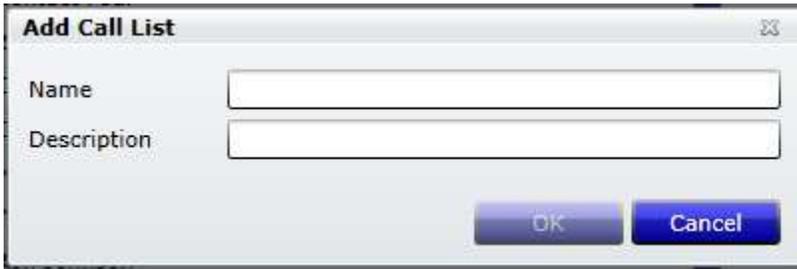
- Select the Contact you want to add to the Call List, and click **“OK”**.  
**Result:** the Contact you added now displays on the Call List to which you added it as shown in the following screenshot:



- If you want to add a whole new Call List (as opposed to just the new Contact you added to an existing Call List), click the **“Add”** link below the bottom Call List as shown in the following screenshot:



**Result:** the “Add Call List” window displays as shown in the following screenshot:



7. Enter a name and a description into the appropriate fields, and then click “**OK**”.

**Result:** the Call List you added now displays on the list as shown in the following screenshot:



8. If you want to edit the new Call List you just added, expand and edit it. When you finish adding information, click “**Save**”.