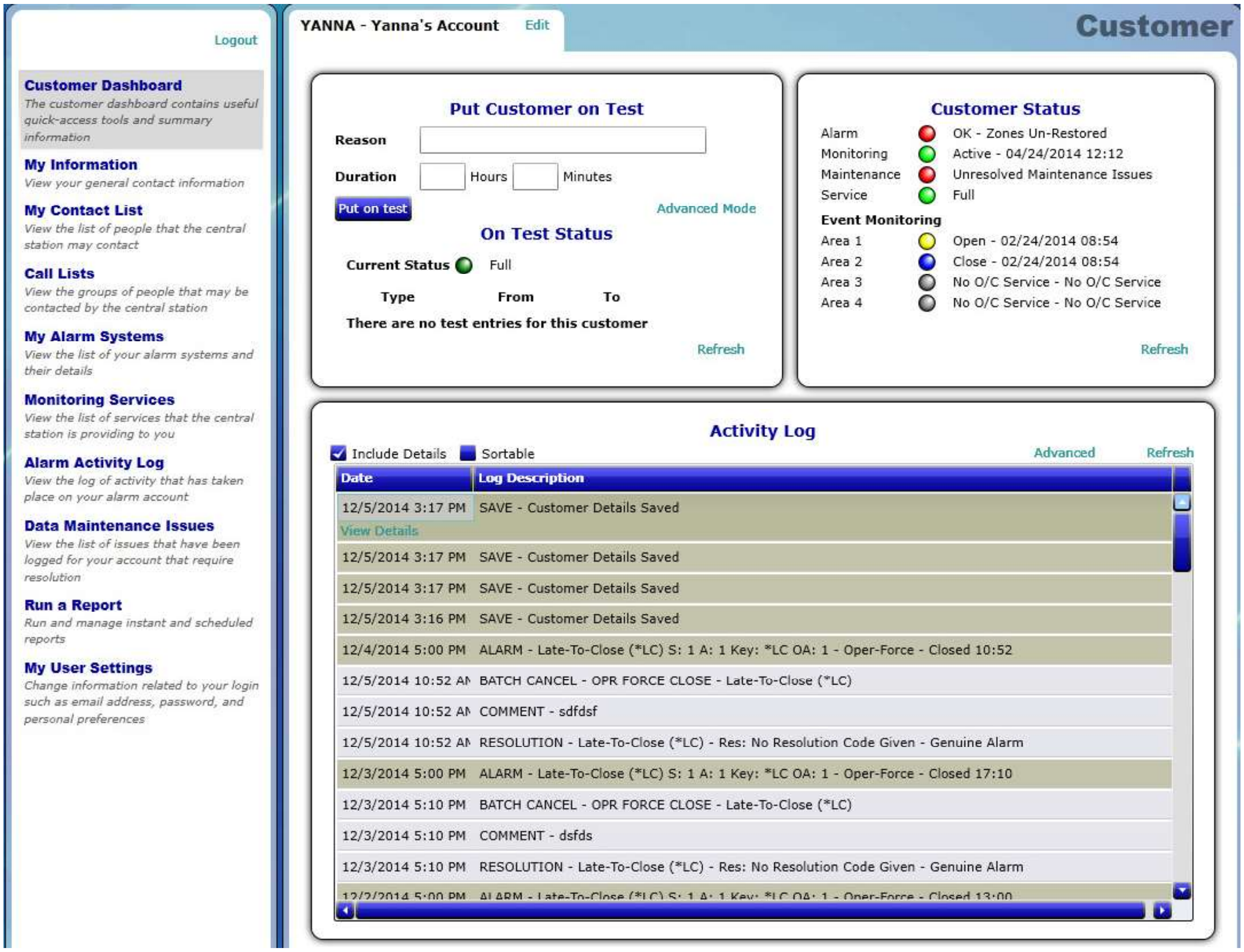
Viewing Customer Information on the Dashboard

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

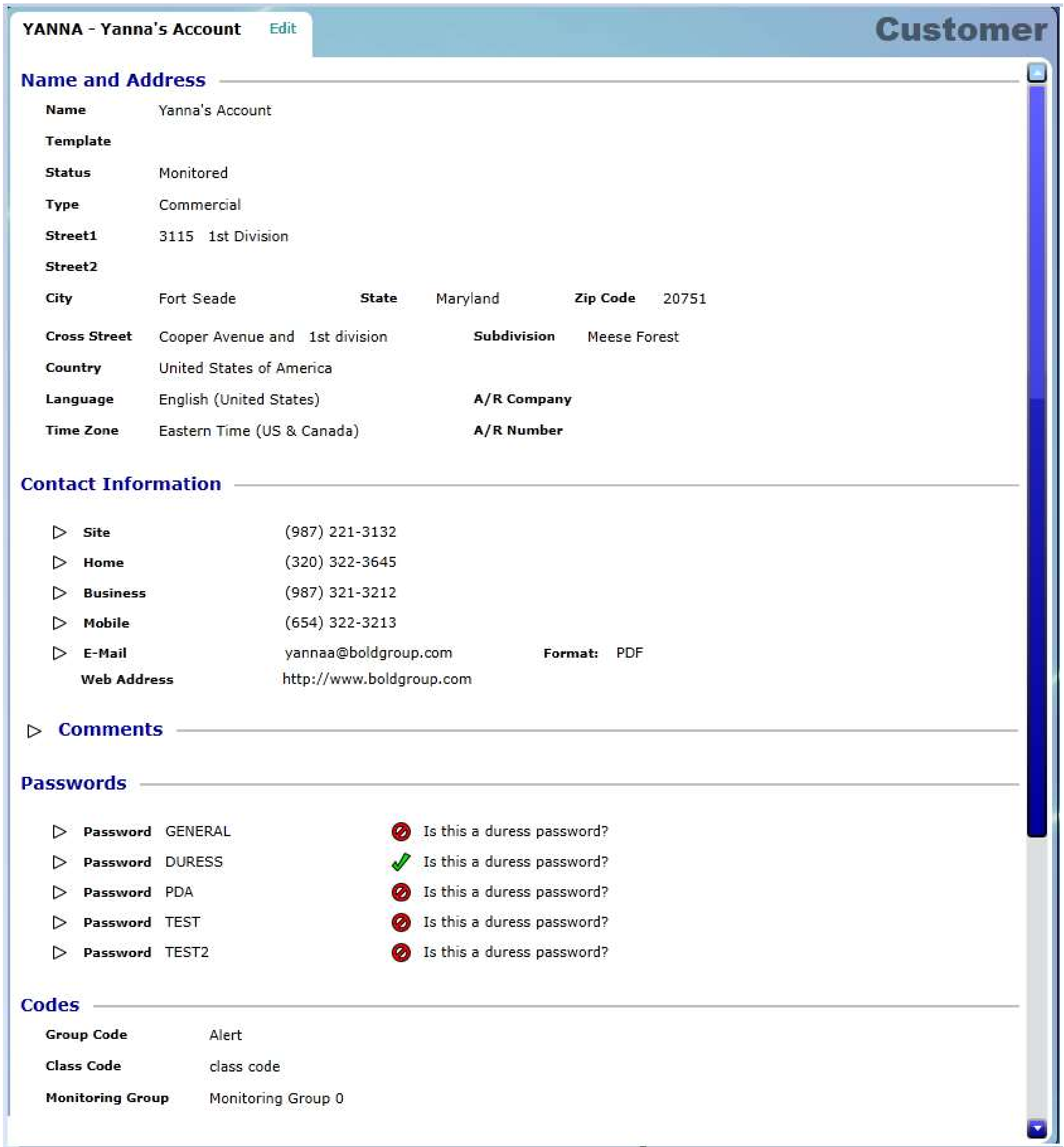


The “Customer Dashboard” includes the following three windows: “Put Customer on Test”, “Customer Status”, and “Activity Log”.

Viewing and Editing Customer Information on the Customer Information Window

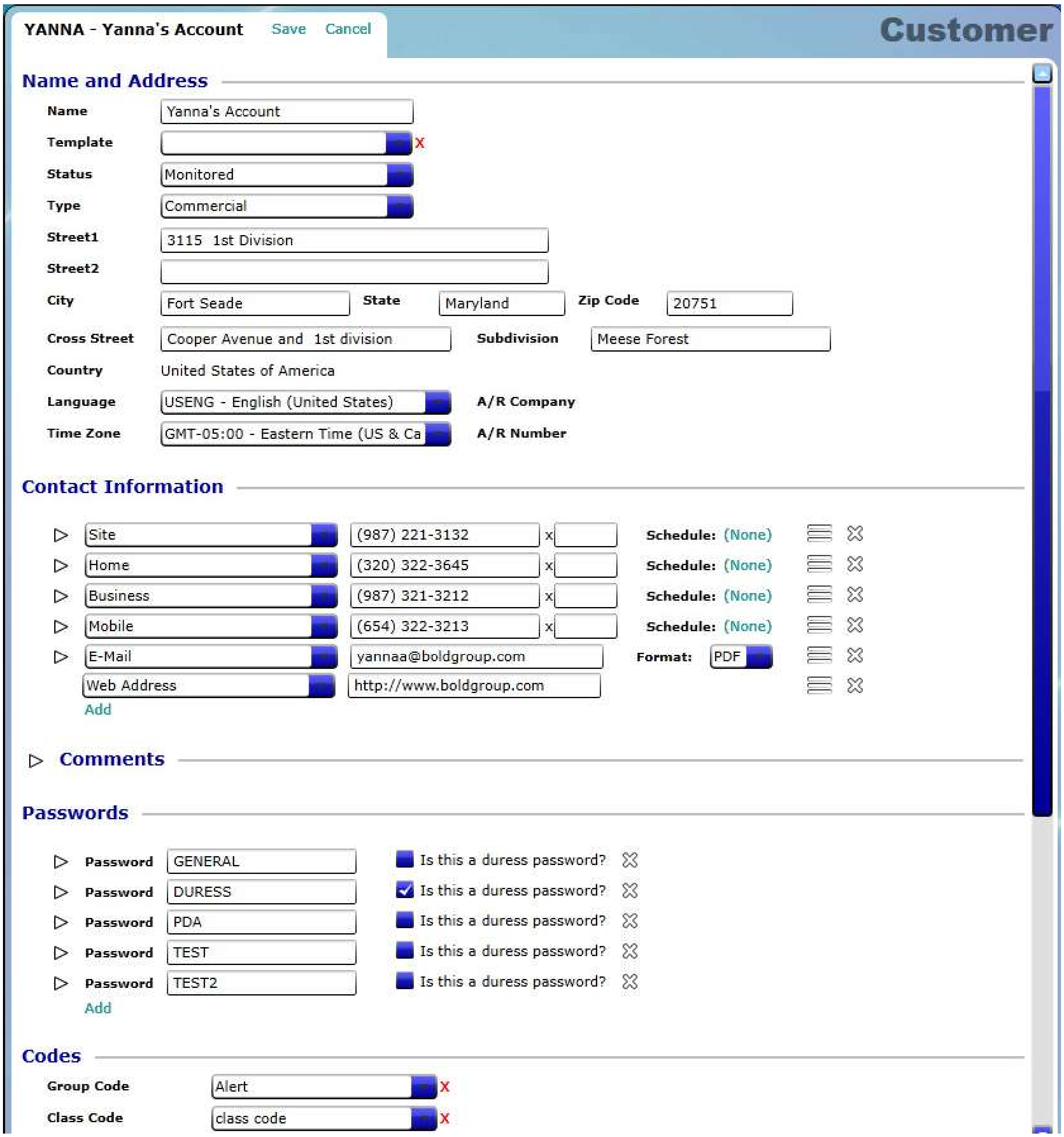
From the "Customer Dashboard", click the "My Information" option from the Navigation area as shown in the following screenshot:

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



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:



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

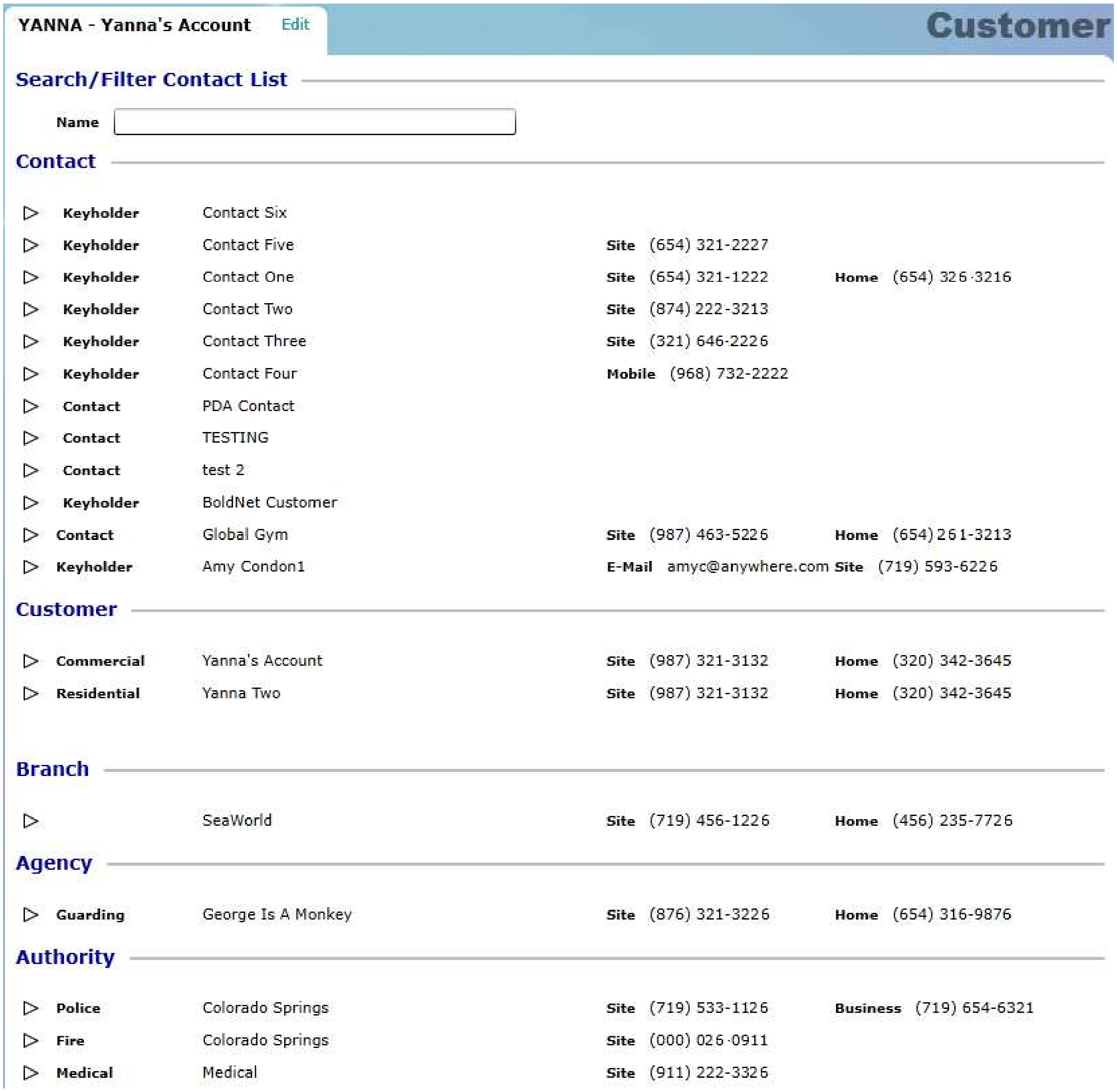
Viewing and Editing a Contact List

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

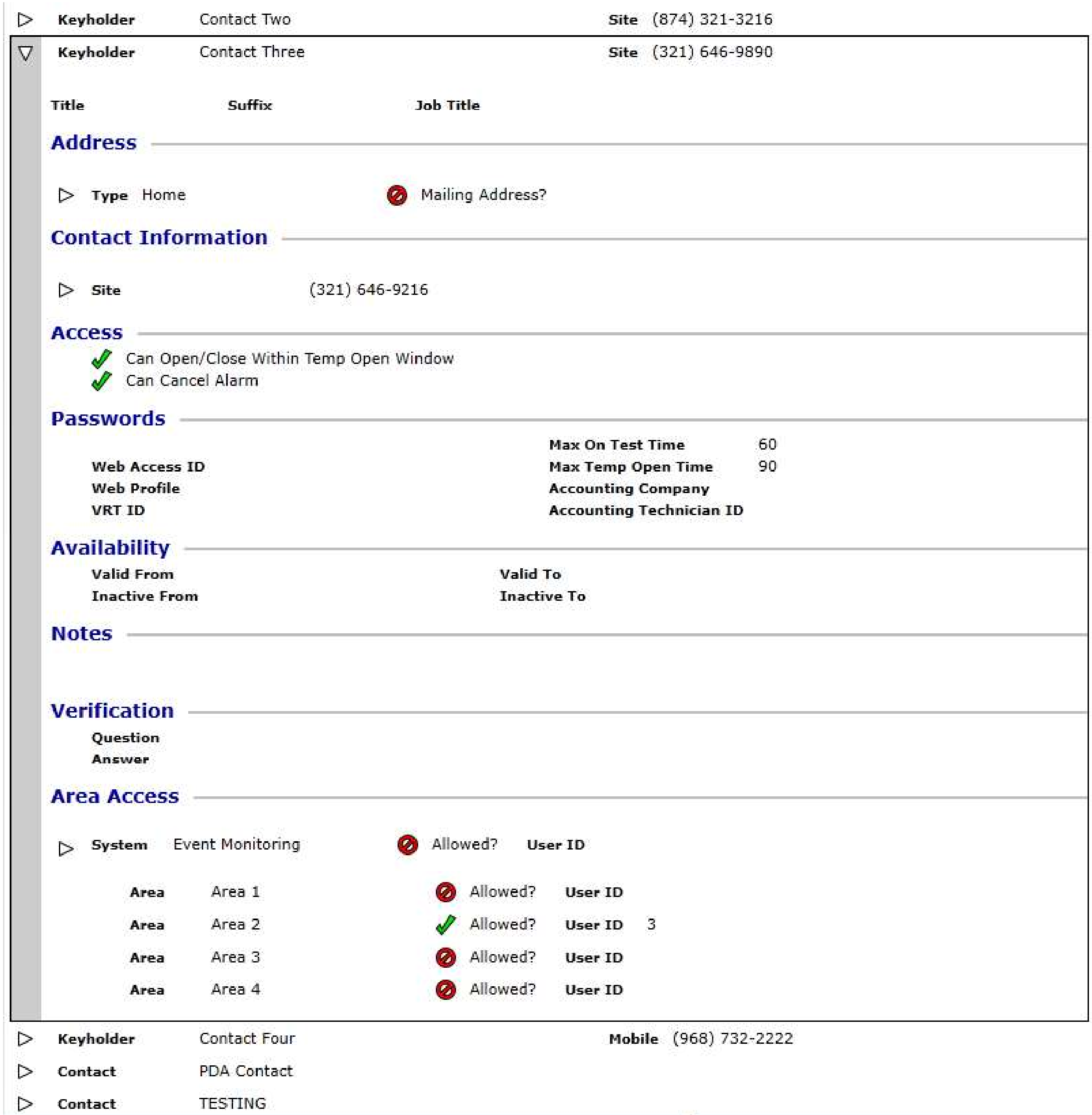
Perform the following steps to view and edit a Contact List in the Customer context:

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:

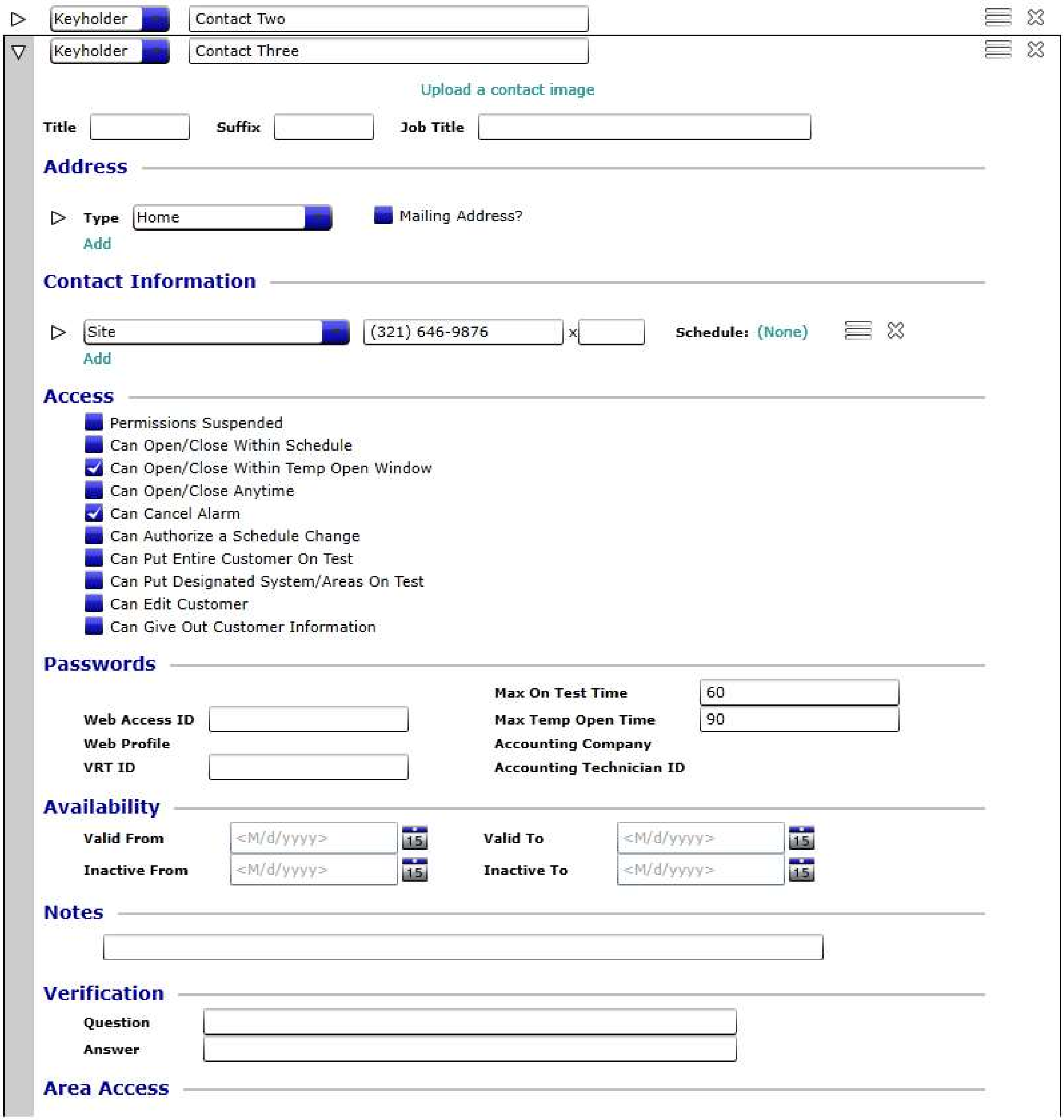


2. Click the arrow icon to expand the Contact you want to view or edit.
   Result: the entry displays expanded as shown in the following screenshot:



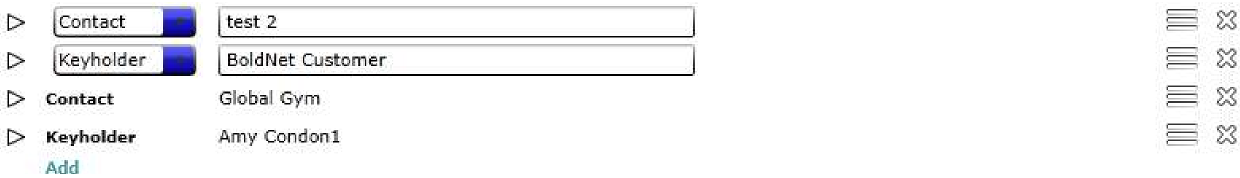
3. If you want to edit the Contact you selected, click "**Edit**" as shown in the following screenshot:

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



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

5. 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:

6. Enter a name into the "Name" field.
7. If you want, modify the default values for country, language, and time zone in the appropriate fields.
8. 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:

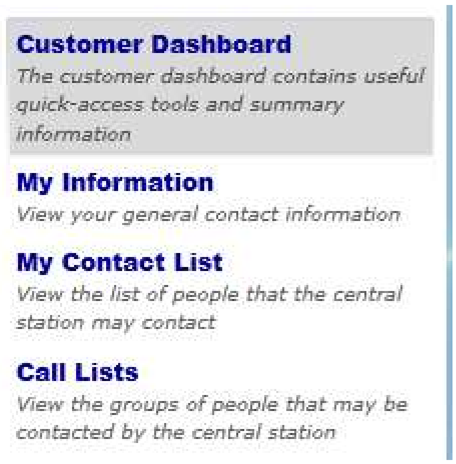
9. If you want to add information to your new Contact, expand the listing and make any edits you want.
10. Click "**Save**".

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:

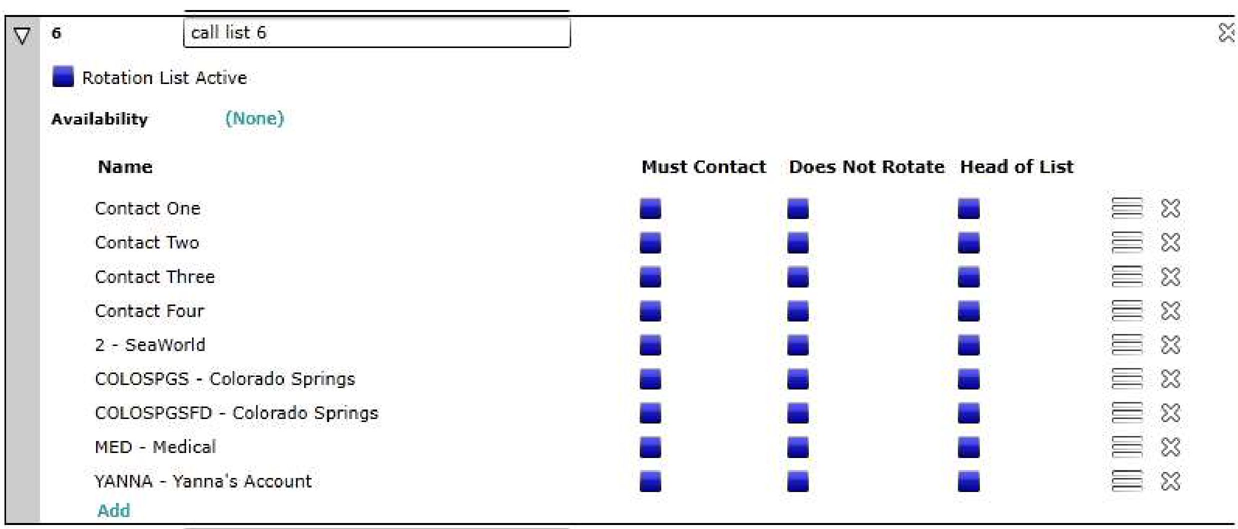


Result: the following Call Lists window displays:

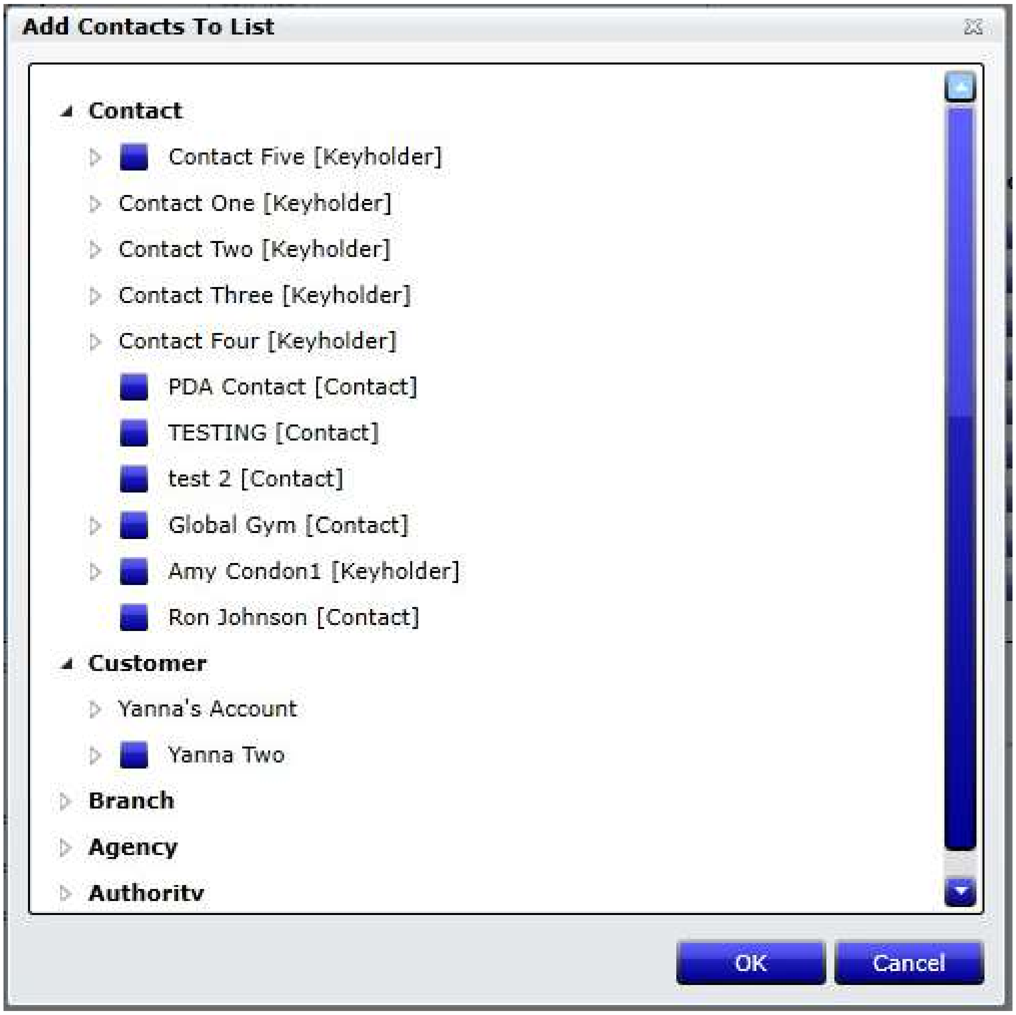
2. To view a Call List, click the arrow icon next to the Call List entry to expand it.
   Result: the Call List entry displays expanded as shown in the following screenshot:

3. If you want to edit the Call List entry, click "**Edit**" as shown in the following screenshot:

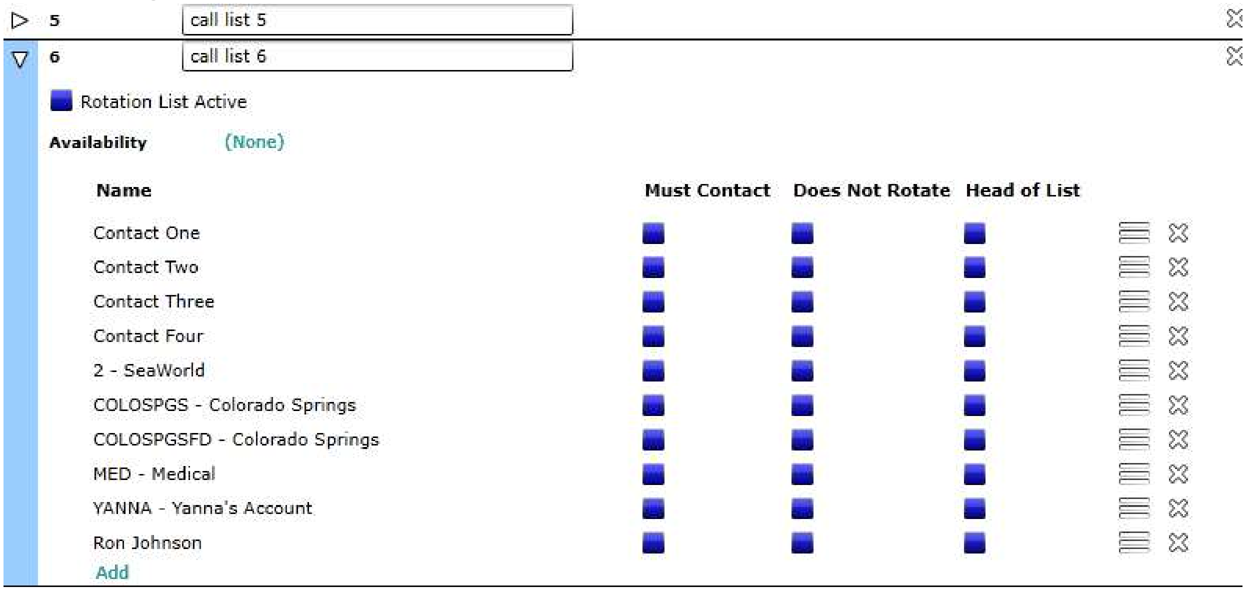
   Result: the Call List you expanded now displays as shown in the following screenshot:



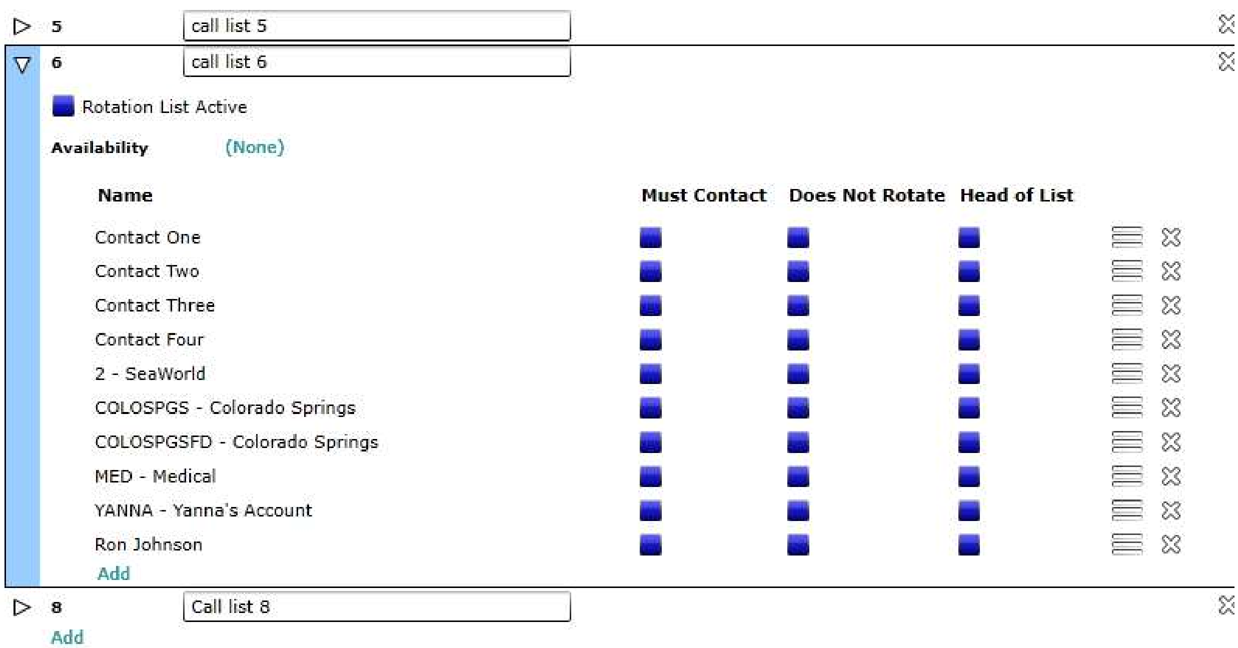
4. If you want to add a Contact to the Call List you selected for editing, click "**Add**".
Result: the "Add Contacts to List" window displays as shown in the following screenshot:



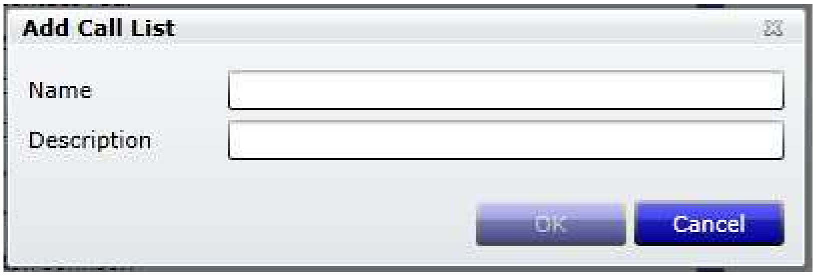
5. Select the Contact you want to add to the Call List, and click "**OK**".
   Result: the Contact you added now displays on the Call List to which you added it as shown in the following screenshot:



6. 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**".