

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 includes a sidebar with navigation links and a main content area with three primary sections: 'Put Customer on Test', 'Customer Status', and 'Activity Log'.

Customer Dashboard
The customer dashboard contains useful quick-access tools and summary information

My Information
View your general contact information

My Contact List
View the list of people that the central station may contact

Call Lists
View the groups of people that may be contacted by the central station

My Alarm Systems
View the list of your alarm systems and their details

Monitoring Services
View the list of services that the central station is providing to you

Alarm Activity Log
View the log of activity that has taken place on your alarm account

Data Maintenance Issues
View the list of issues that have been logged for your account that require resolution

Run a Report
Run and manage instant and scheduled reports

My User Settings
Change information related to your login such as email address, password, and personal preferences

Put Customer on Test

Reason:

Duration: Hours Minutes

On Test Status

Current Status: ● Full

Type: From: To:

There are no test entries for this customer

Customer Status

Alarm: ● OK - Zones Un-Restored

Monitoring: ● Active - 04/24/2014 12:12

Maintenance: ● Unresolved Maintenance Issues

Service: ● Full

Event Monitoring

Area 1: ● Open - 02/24/2014 08:54

Area 2: ● Close - 02/24/2014 08:54

Area 3: ● No O/C Service - No O/C Service

Area 4: ● No O/C Service - No O/C Service

Activity Log

☒ Include Details ☐ Sortable

Date	Log Description
12/5/2014 3:17 PM	SAVE - Customer Details Saved
12/5/2014 3:17 PM	SAVE - Customer Details Saved
12/5/2014 3:17 PM	SAVE - Customer Details Saved
12/5/2014 3:16 PM	SAVE - Customer Details Saved
12/4/2014 5:00 PM	ALARM - Late-To-Close (*LC) S: 1 A: 1 Key: *LC OA: 1 - Oper-Force - Closed 10:52
12/5/2014 10:52 AM	BATCH CANCEL - OPR FORCE CLOSE - Late-To-Close (*LC)
12/5/2014 10:52 AM	COMMENT - sdfsf
12/5/2014 10:52 AM	RESOLUTION - Late-To-Close (*LC) - Res: No Resolution Code Given - Genuine Alarm
12/3/2014 5:00 PM	ALARM - Late-To-Close (*LC) S: 1 A: 1 Key: *LC OA: 1 - Oper-Force - Closed 17:10
12/3/2014 5:10 PM	BATCH CANCEL - OPR FORCE CLOSE - Late-To-Close (*LC)
12/3/2014 5:10 PM	COMMENT - dsfds
12/3/2014 5:10 PM	RESOLUTION - Late-To-Close (*LC) - Res: No Resolution Code Given - Genuine Alarm
12/3/2014 5:00 PM	ALARM - Late-To-Close (*LC) S: 1 A: 1 Key: *LC OA: 1 - Oper-Force - Closed 13:00

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

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		

Contact Information

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

▷ **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?

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:

A screenshot of a web application form titled 'Customer'. The form is divided into several sections: 'Name and Address', 'Contact Information', 'Comments', 'Passwords', and 'Codes'. The 'Name and Address' section contains fields for Name, Template, Status, Type, Street1, Street2, City, State, Zip Code, Cross Street, Subdivision, Country, Language, Time Zone, A/R Company, and A/R Number. The 'Contact Information' section contains fields for Site, Home, Business, Mobile, E-Mail, and Web Address, each with a corresponding phone number field and a 'Schedule' dropdown. The 'Passwords' section contains fields for Password, Is this a duress password?, and a 'Format' dropdown. The 'Codes' section contains fields for Group Code and Class Code. The form has a blue header bar with the text 'YANNA - Yanna's Account' and 'Save Cancel'. The 'Customer' title is in the top right corner. The form is styled with a blue and white color scheme.

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

▷

Keyholder

Contact Six

▷

Keyholder

Contact Five

Site

(654) 321-2227

▷

Keyholder

Contact One

Site

(654) 321-1222

Home

(654) 326-3216

▷

Keyholder

Contact Two

Site

(874) 222-3213

▷

Keyholder

Contact Three

Site

(321) 646-2226

▷

Keyholder

Contact Four

Mobile

(968) 732-2222

▷

Contact

PDA Contact

▷

Contact

TESTING

▷

Contact

test 2

▷

Keyholder

BoldNet Customer

▷

Contact

Global Gym

Site

(987) 463-5226

Home

(654) 261-3213

▷

Keyholder

Amy Condon1

E-Mail

amyc@anywhere.com

Site

(719) 593-6226

Customer

▷

Commercial

Yanna's Account

Site

(987) 321-3132

Home

(320) 342-3645

▷

Residential

Yanna Two

Site

(987) 321-3132

Home

(320) 342-3645

Branch

▷

SeaWorld

Site

(719) 456-1226

Home

(456) 235-7726

Agency

▷

Guarding

George Is A Monkey

Site

(876) 321-3226

Home

(654) 316-9876

Authority

▷

Police

Colorado Springs

Site

(719) 533-1126

Business

(719) 654-6321

▷

Fire

Colorado Springs

Site

(000) 026-0911

▷

Medical

Medical

Site

(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:

▶	Keyholder	Contact Two	Site	(874) 321-3216																														
▼	Keyholder	Contact Three	Site	(321) 646-9890																														
<table border="0"> <tr> <td>Title</td> <td>Suffix</td> <td>Job Title</td> </tr> </table>					Title	Suffix	Job Title																											
Title	Suffix	Job Title																																
Address																																		
<table border="0"> <tr> <td>▶</td> <td>Type</td> <td>Home</td> <td></td> <td>Mailing Address?</td> </tr> </table>					▶	Type	Home		Mailing Address?																									
▶	Type	Home		Mailing Address?																														
Contact Information																																		
<table border="0"> <tr> <td>▶</td> <td>Site</td> <td>(321) 646-9216</td> </tr> </table>					▶	Site	(321) 646-9216																											
▶	Site	(321) 646-9216																																
Access																																		
<table border="0"> <tr> <td></td> <td>Can Open/Close Within Temp Open Window</td> </tr> <tr> <td></td> <td>Can Cancel Alarm</td> </tr> </table>						Can Open/Close Within Temp Open Window		Can Cancel Alarm																										
	Can Open/Close Within Temp Open Window																																	
	Can Cancel Alarm																																	
Passwords																																		
<table border="0"> <tr> <td>Web Access ID</td> <td>Max On Test Time</td> <td>60</td> </tr> <tr> <td>Web Profile</td> <td>Max Temp Open Time</td> <td>90</td> </tr> <tr> <td>VRT ID</td> <td>Accounting Company</td> <td></td> </tr> <tr> <td></td> <td>Accounting Technician ID</td> <td></td> </tr> </table>					Web Access ID	Max On Test Time	60	Web Profile	Max Temp Open Time	90	VRT ID	Accounting Company			Accounting Technician ID																			
Web Access ID	Max On Test Time	60																																
Web Profile	Max Temp Open Time	90																																
VRT ID	Accounting Company																																	
	Accounting Technician ID																																	
Availability																																		
<table border="0"> <tr> <td>Valid From</td> <td>Valid To</td> </tr> <tr> <td>Inactive From</td> <td>Inactive To</td> </tr> </table>					Valid From	Valid To	Inactive From	Inactive To																										
Valid From	Valid To																																	
Inactive From	Inactive To																																	
Notes																																		
Verification																																		
<table border="0"> <tr> <td>Question</td> <td></td> </tr> <tr> <td>Answer</td> <td></td> </tr> </table>					Question		Answer																											
Question																																		
Answer																																		
Area Access																																		
<table border="0"> <tr> <td>▶</td> <td>System</td> <td>Event Monitoring</td> <td></td> <td>Allowed?</td> <td>User ID</td> </tr> <tr> <td></td> <td>Area</td> <td>Area 1</td> <td></td> <td>Allowed?</td> <td>User ID</td> </tr> <tr> <td></td> <td>Area</td> <td>Area 2</td> <td></td> <td>Allowed?</td> <td>User ID 3</td> </tr> <tr> <td></td> <td>Area</td> <td>Area 3</td> <td></td> <td>Allowed?</td> <td>User ID</td> </tr> <tr> <td></td> <td>Area</td> <td>Area 4</td> <td></td> <td>Allowed?</td> <td>User ID</td> </tr> </table>					▶	System	Event Monitoring		Allowed?	User ID		Area	Area 1		Allowed?	User ID		Area	Area 2		Allowed?	User ID 3		Area	Area 3		Allowed?	User ID		Area	Area 4		Allowed?	User ID
▶	System	Event Monitoring		Allowed?	User ID																													
	Area	Area 1		Allowed?	User ID																													
	Area	Area 2		Allowed?	User ID 3																													
	Area	Area 3		Allowed?	User ID																													
	Area	Area 4		Allowed?	User ID																													
▶	Keyholder	Contact Four	Mobile	(968) 732-2222																														
▶	Contact	PDA Contact																																
▶	Contact	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 titled 'Contact Two'. The form is organized into several sections:

- Header:** A dropdown menu set to 'Keyholder' and a text field containing 'Contact Two'.
- Address Section:** Includes fields for 'Title', 'Suffix', and 'Job Title'. Below these is a link to 'Upload a contact image'.
- Contact Information Section:** Features a 'Type' dropdown set to 'Home', a 'Mailing Address?' checkbox, and a link to 'Add'.
- Access Section:** A list of permissions with checkboxes, including 'Can Open/Close Within Temp Open Window' and 'Can Cancel Alarm', which are checked.
- Passwords Section:** Contains fields for 'Web Access ID', 'Web Profile', 'VRT ID', 'Max On Test Time' (set to 60), 'Max Temp Open Time' (set to 90), 'Accounting Company', and 'Accounting Technician ID'.
- Availability Section:** Includes date pickers for 'Valid From', 'Valid To', 'Inactive From', and 'Inactive To', all showing a date of 15.
- Notes Section:** A large text area for notes.
- Verification Section:** Fields for 'Question' and 'Answer'.
- Area Access Section:** A final section at the bottom.

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:



The screenshot shows a form with two main sections. The first section has a 'Contact' dropdown menu with 'test 2' selected. The second section has a 'Keyholder' dropdown menu with 'BoldNet Customer' selected. Below these, there are two rows of text: 'Contact' followed by 'Global Gym' and 'Keyholder' followed by 'Amy Condon1'. At the bottom left, there is a blue 'Add' link. On the right side, there are four sets of icons, each consisting of a list icon and a close icon.

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



The screenshot shows a dialog box titled 'Add Keyholder'. It has four fields: 'Name' (empty), 'Country' (United States of America), 'Language' (English (United States)), and 'Time Zone' (Eastern Time (US & Canada)). At the bottom right, there are 'OK' and 'Cancel' buttons.

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:



The screenshot shows a form with two main sections. The first section has a 'Keyholder' dropdown menu with 'Amy Condon1' selected. The second section has a 'Contact' dropdown menu with 'Ron Johnson' selected. On the right side, there are four sets of icons, each consisting of a list icon and a close icon.

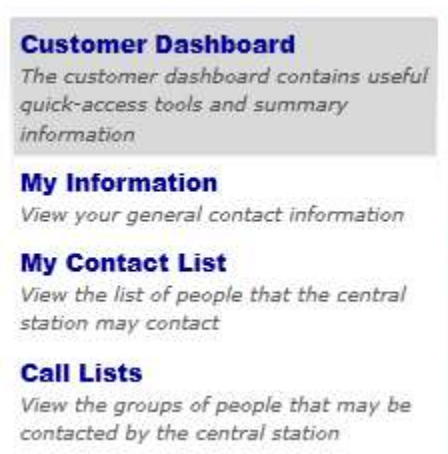
9. If you want to add information to your new Contact, expand the listing and make any edits you want.
10. Click **“Save”**.

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:



- 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:



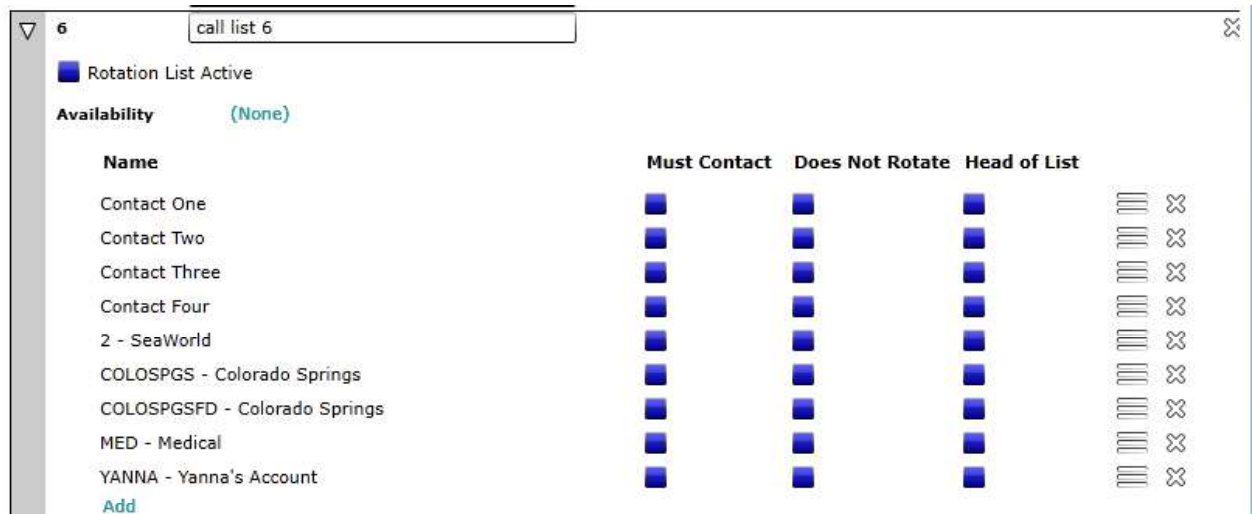
6 call list 6

Name	Must Contact	Does Not Rotate
Contact One		
Contact Two		
Contact Three		
Contact Four		
2 - SeaWorld		
COLOSPGS - Colorado Springs		
COLOSPGSFD - Colorado Springs		
MED - Medical		
YANNA - Yanna's Account		

- 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:



6 call list 6

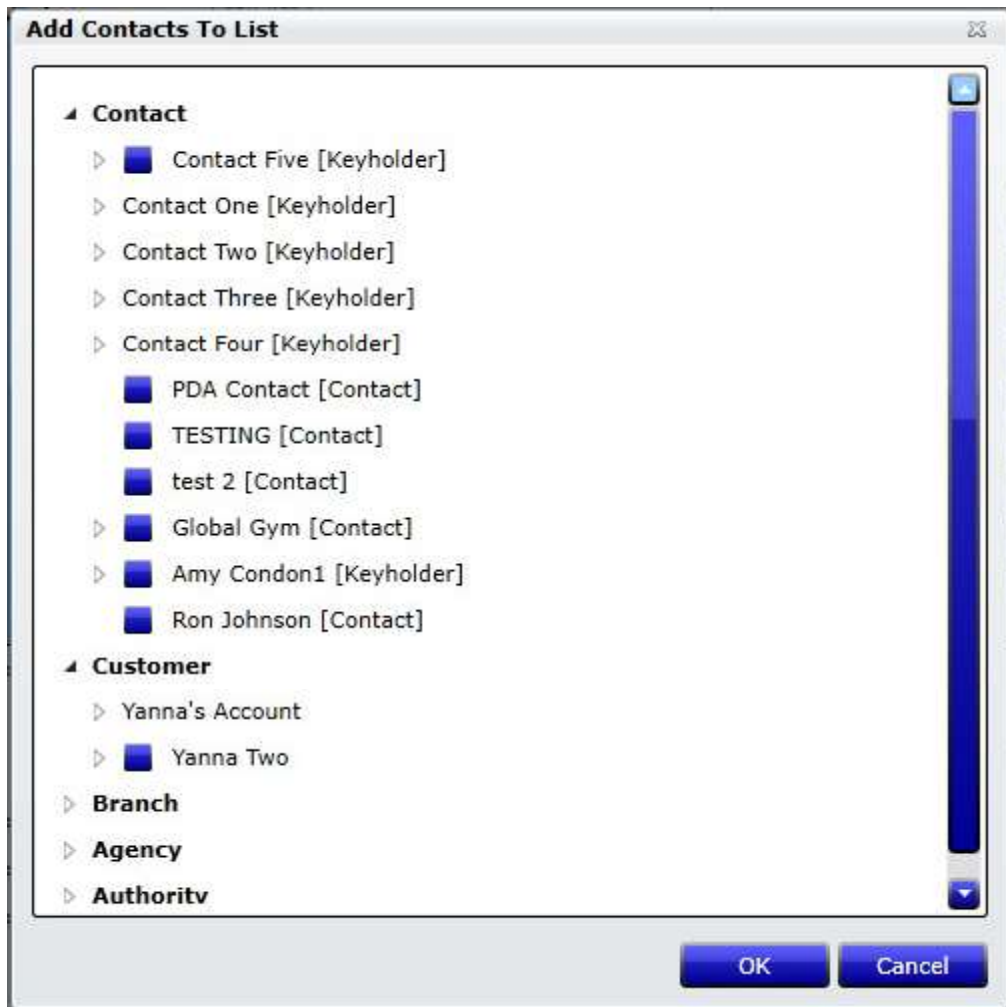
☒ Rotation List Active

Availability (None)

Name	Must Contact	Does Not Rotate	Head of List
Contact One	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Two	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Three	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Four	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2 - SeaWorld	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
COLOSPGS - Colorado Springs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
COLOSPGSFD - Colorado Springs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MED - Medical	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
YANNA - Yanna's Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Add

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:

The screenshot shows a web interface for managing call lists. At the top, there are two tabs: '5' (selected) and '6'. Below the tabs, there is a section for 'call list 5' and 'call list 6'. Under 'call list 6', there is a checkbox for 'Rotation List Active' which is checked. Below this, there is a section for 'Availability' with a dropdown menu set to '(None)'. The main part of the interface is a table with the following columns: 'Name', 'Must Contact', 'Does Not Rotate', 'Head of List', and an action column with a list icon and a close icon. The table contains the following rows:

Name	Must Contact	Does Not Rotate	Head of List	
Contact One	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Contact Two	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Contact Three	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Contact Four	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
2 - SeaWorld	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
COLOSPGS - Colorado Springs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
COLOSPGSFD - Colorado Springs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
MED - Medical	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
YANNA - Yanna's Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Ron Johnson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

At the bottom of the table, there is a link labeled 'Add'.

- 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:

The screenshot shows the same web interface as the previous one, but with an additional tab '8' at the bottom. The 'Add' link is now visible below the '8' tab. The table content remains the same as in the previous 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**”.