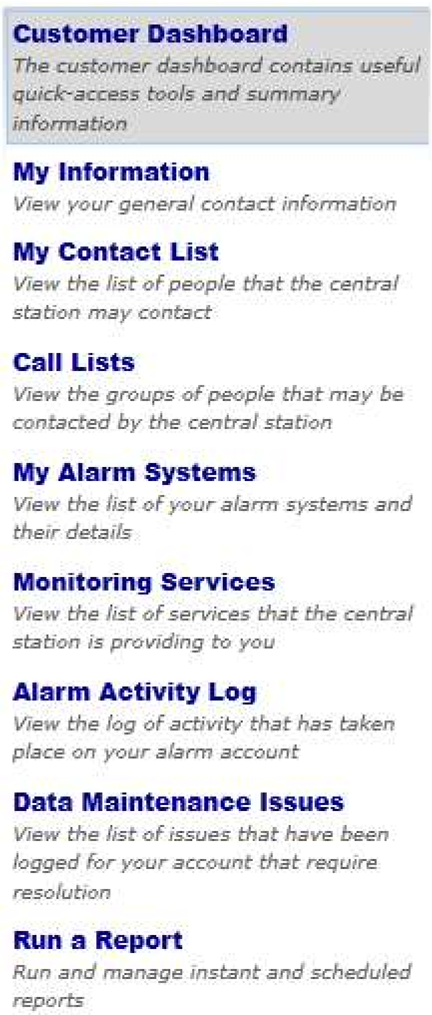
Generating a Report

BoldNet has the following two Report formats available: “System Reports” and “Scheduled Reports”. System Reports are individual Reports you must create each time you want one to generate. Scheduled Reports, on the other hand, are created once and then generate according to a user-designated interval.

Generating a System Report

Perform the following steps to generate a System Report from the BoldNet Customer context:

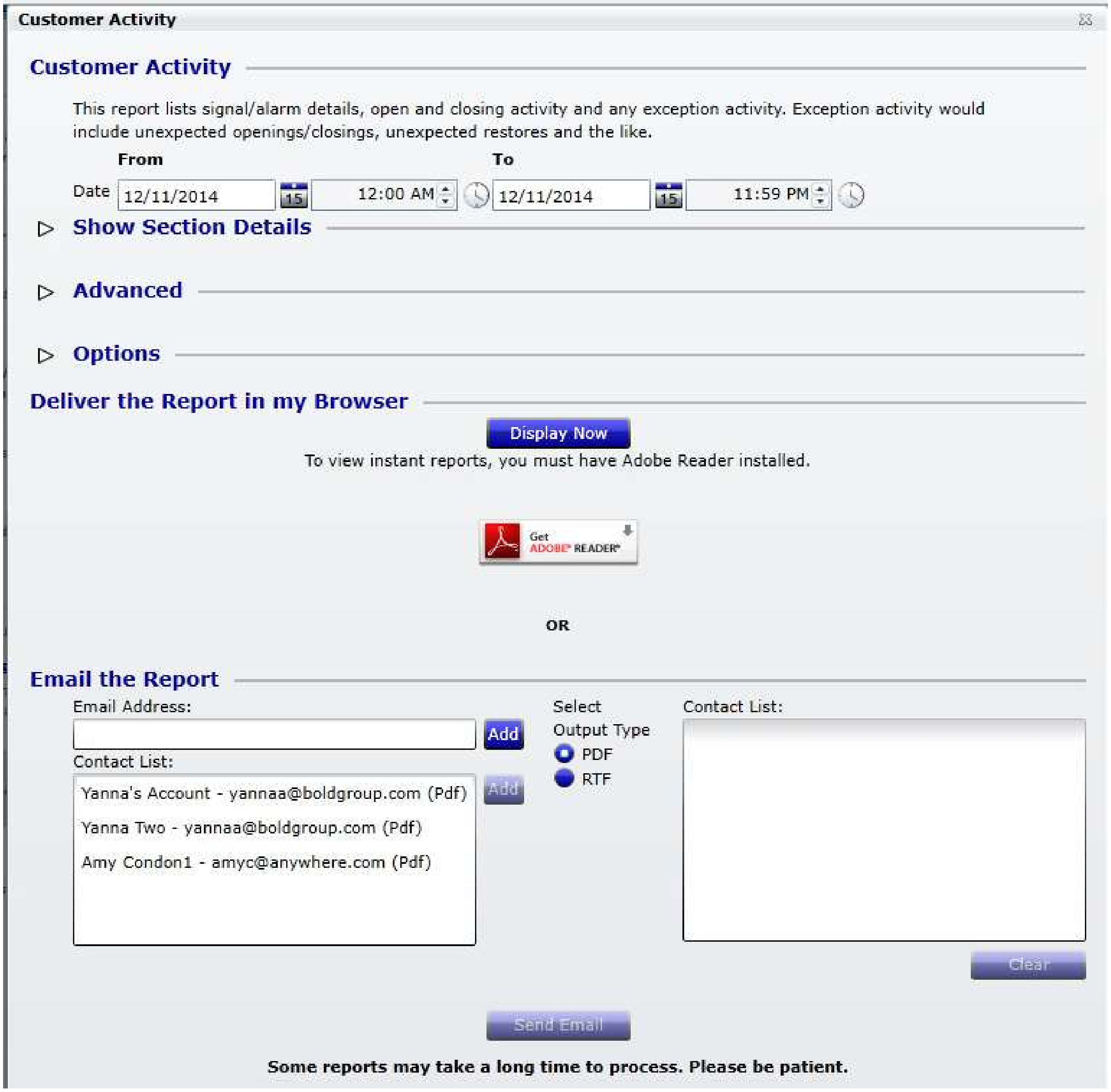
1. From the “Dashboard” view, click the “Report” option from the Navigation area as shown in the following screenshot:



Result: the following Reports screen displays:

2. Select the link for the Report you want to generate from the “System Reports” area of the window.

Result: a window displays on which you can enter the details for the System Report you want to generate as shown in the following screenshot:



Note: the Report window that displays is specific to the type of Report you want to generate. The Report window displayed in the screenshot above is for the “Customer Activity” Report.

3. Enter the parameters for your Report. Refer to the following link for more information on similar functionality for Supervisor Workstation Reports: https://support.boldgroup.com/media/docs/Release_Notes/1.6.1/CS/Manitou_CS_1.6.1_SWS_UG.pdf
   Note: you must have Fusion access to view linked documents. If you do not yet have the necessary access, contact Bold Support.
4. You have the option of either displaying the Report as a PDF, or of emailing it in PDF or RTF format. When you finish entering the Report parameters, click either the "**Display Now**" or the "**Send Email**" button.
   Result: the following widow displays:

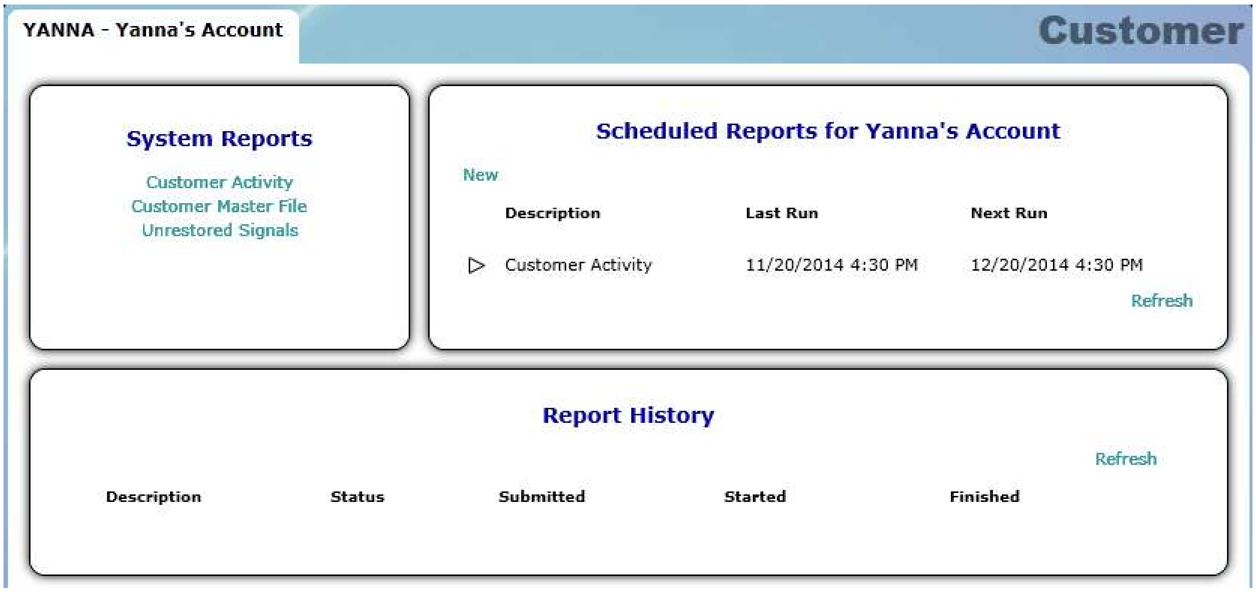
5. Once the system finishes generating the document, the following window displays:

6. If you want to view the Report, click "**View Report**".
   Note: if you designated that the Report should be sent as an email, it arrives at the same time the above screenshot displays.

Generating a Scheduled Report

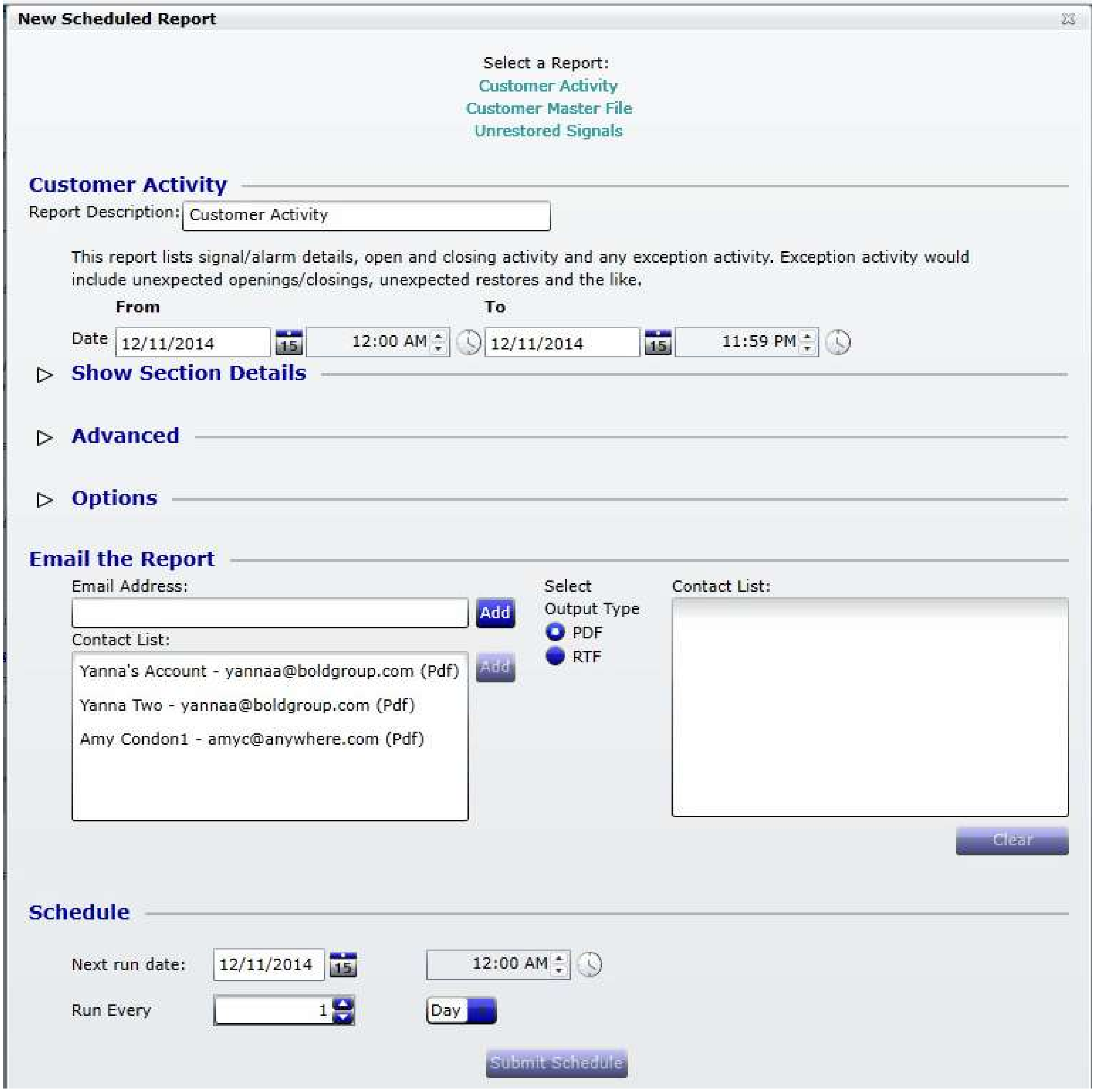
Perform the following steps to generate a Scheduled Report from BoldNet:

1. If you want to set a scheduled Report in BoldNet, click the “New” link in the “Scheduled Reports” area of the Reports window as shown in the following screenshot:



Result: the following window displays:

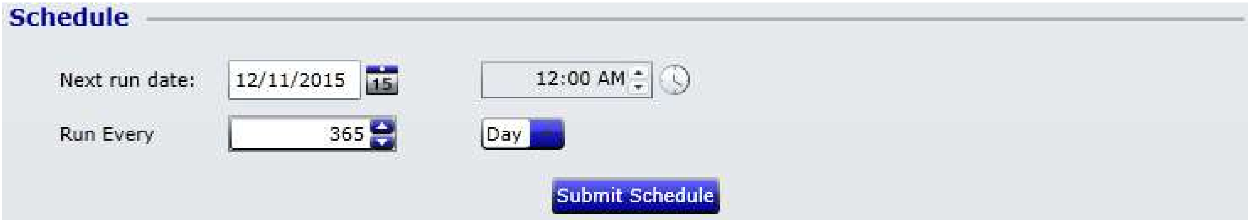
2. Click an option to select the type of Report you want to schedule.
   Result: a form for the Report type you selected displays as shown in the following screenshot:



Note: the example screenshot above shows a "Customer Activity" Report form.

3. Enter parameters for the Scheduled Report you want to generate into the "Customer Activity" area of the form.
4. Enter the email recipients you want to receive your Report into the "Email the Report" area of the form.
5. In the "Schedule" area of the form, designate the date on which you want the first Report to generate and the generation interval.

6. When you finish entering Report parameters and information, click “**Submit Schedule**” as shown in the following screenshot:



Result: the Scheduled Report you created now displays in the “Scheduled Reports” area of the form. The Scheduled Report you added will generate and be emailed to your recipients on the date you designated.

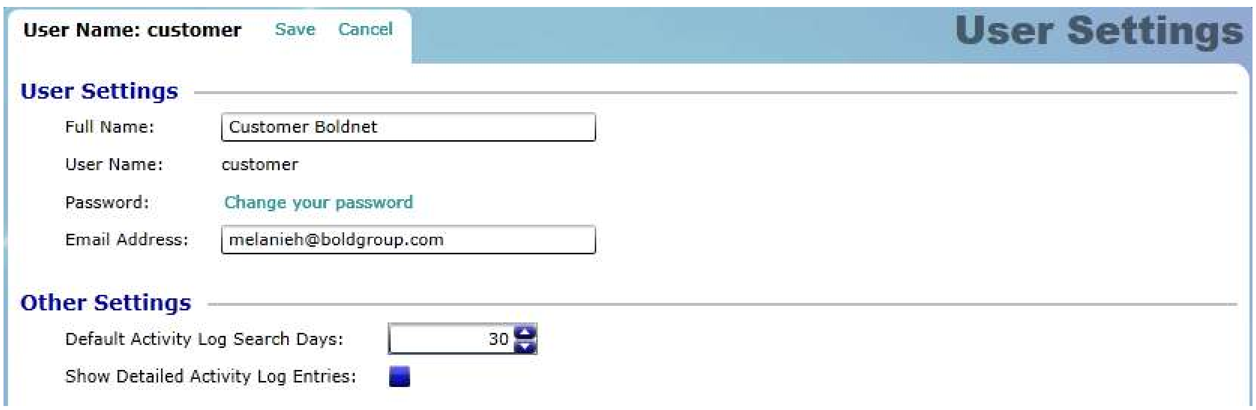
Changing your Customer Account Settings

Perform the following steps to change your Customer account settings using the BoldNet Customer context:

1. From the "Customer Dashboard" view, click the "My User Settings" option from the Navigation area as shown in the following screenshot:

Result: the "User Settings" window displays as shown in the following screenshot:

2. Click "**Edit**".
   Result: the "User Settings" window now displays as follows:



3. Modify the text in any fields you want to change.
4. If you want to change the account password, click the "**Change your password**" link.
   Result: the "Change Password" window displays as shown in the following screenshot:

5. Enter your current password into the “Current Password:” field.
6. Enter the new password you want into both the “New Password:” and the “New Password (verify):” fields, and click “**OK**”.
   Result: your new password is now active. You must use it the next time you log into BoldNet.
7. When you finish modifying your user settings, click “**Save**”.