

# BoldNet NEO Training

This guide is intended to aid dealers and their in navigating the BoldNet NEO online application. BoldNet provides access to view dealer and customer account information and history related to the dealer's entire account base with WHIRC. A mobile app is also available.

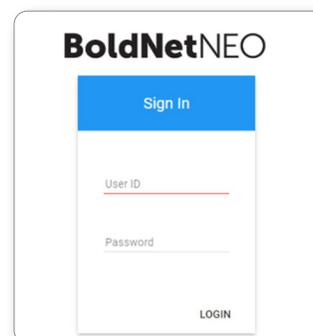
## ACCESS BOLDNET SIGN IN – <https://dealer.whirc.com/manitou>

### Log In & Password

- » Enter your log in information.
- » Log In/Password may be obtained by contacting the WHIRC Dealer Representative.

### MY DASHBOARD

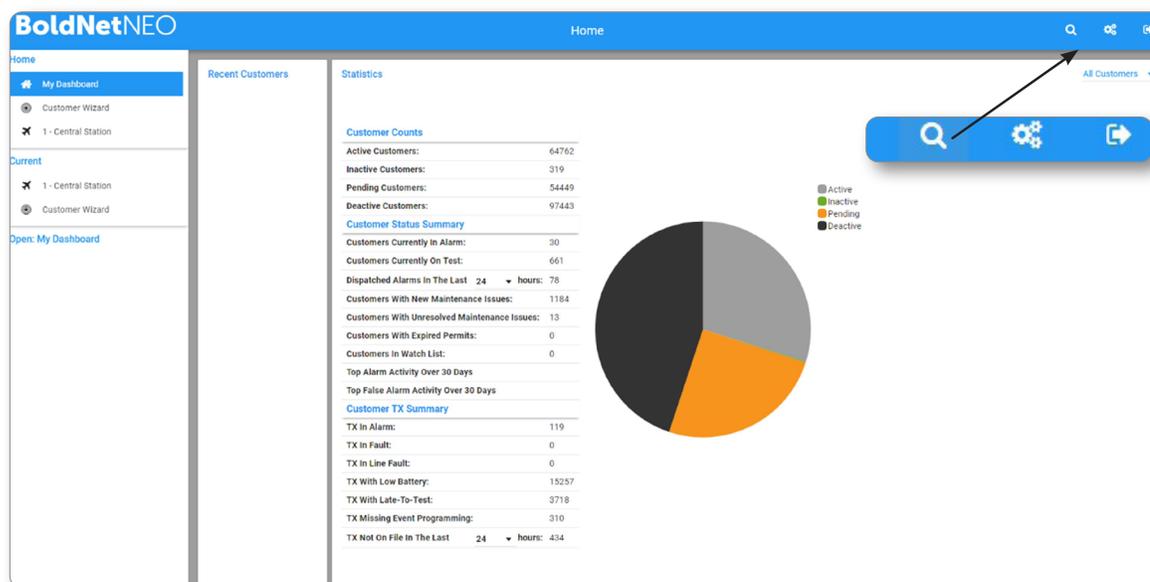
- » This is the main screen that will display upon entering into BoldNet Neo.
- » Information regarding your customer counts, customer status, and transmitter summary will be listed in this area.
- » This is also where you will begin searching for customers.



Sign in screen

### SEARCHING

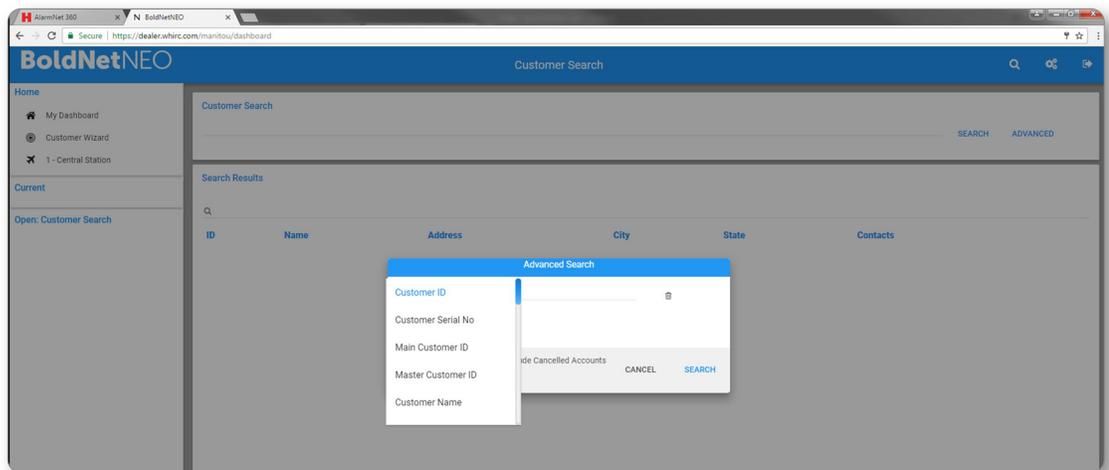
The screen shown below provides the ability to complete a Quick Search for customers by name or ID by clicking on the magnifying glass.



Use the magnifying glass to search.

The Advanced search includes filters to narrow down your search for a specific account.

- » Enter the search criteria.
- » Click search or simply press Enter.
- » It is helpful to use “\*name” which will bring up any account with that name in the field. The accounts that best match your criteria will be displayed in the Search Results List below the search filters.
  - Example: You may use “\*WHIRC” which will bring up any account with the word “WHIRC”.
- » To select the site, click on the name.



Advanced search is available

## BOLDNET SECTIONS

On the left hand side of the page there are several different sections to choose from. Under each of these sections, a brief description of what is included is provided.

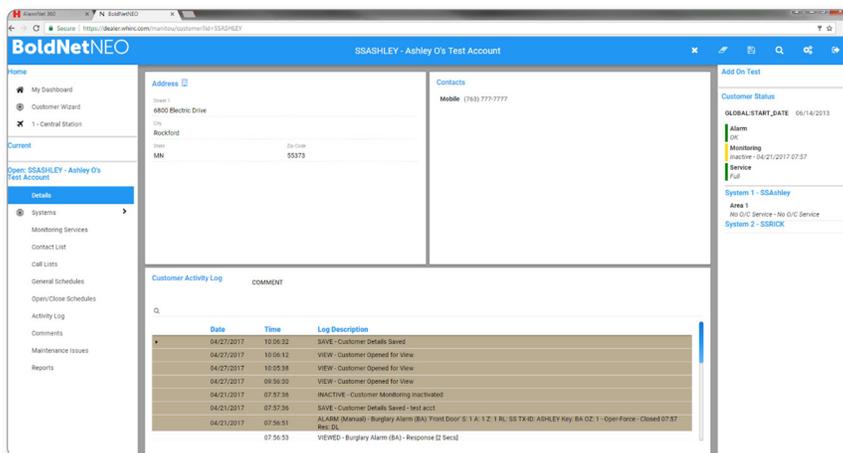
Whether you are able to view or edit information within each section is dependent upon your access/permissions level. **To view additional information, select the right facing triangle next to the information you would like to view and the field will expand.**

**Customer Dashboard** – In the Customer Dashboard section, you may:

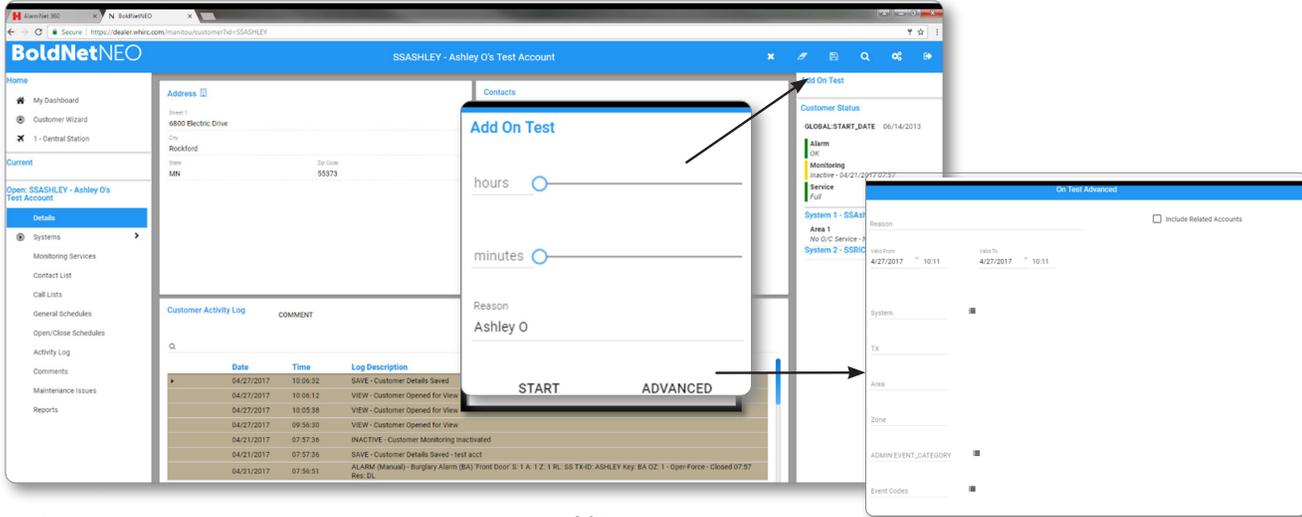
- » View or edit any section of the account you have access to
- » Place a Customer On/Off Test
- » View Customer Status
- » View the Activity Log

### To Place Customer On/Off Test

- » Place Customer On/Off Test(Whole System)
  - Enter reason
  - Enter duration
  - Click "Put on test"
- » Place Customer On Test (System Components)
  - Click Advanced Mode
  - Enter reason
  - Enter From and To dates and times
  - Click Selected Components
    - » Be very cautious when selecting components On Test
    - » Need to understand programming and how events come in
    - » The more you narrow it down, and the programming is not the same, an alarm will drop tan operator
    - » Best to:
      - » Enter System
      - » Enter Event Category, if you choose
      - » Enter Zone, if you choose
      - » Search by System, Transmitter, etc.
    - » Choose to include or not include related accounts
    - » Click "Start"



Customer Dashboard



### Activity Log

- » Shows the customer's most recent activity.
- » You have the ability:
  - To see details
  - To sort information
  - To search for specific information using the advanced search function
- » More information is provided later in this demonstration when we review the Activity Log section

### Add On Test screens

### Details

The Details section includes Customer Name, Address information, Contact information (site=premise phone number), Comments, Passwords, Options, and Permits. If your permissions allow, this information is editable.

### Contact List

The contact list contains users that can access the site, shows if the customer is a residential or commercial account, who the dealer is, branch, and authorities to be contacted for dispatching.

- » To edit information in this section, you will need to click the contacts name and then the pencil for edit.
- » Contacts can be added, deleted, and rearranged

When you select a contact to view, information for that contact will appear.

- » The data, within the expanded section will include: contact information, access permissions, passwords, availability, notes, verification question/answer, and area access
- » Again, depending on your permissions, you may not be able to view passwords, edit, etc.

## Editing Contacts

- » To Delete Users:
  - Click the contact you wish to delete
  - Click the trash can icon to the right of the name of the contact to be deleted
  - Click OK to confirm delete

**Call List** – The call list determines which contacts will be notified and in what order they will be called

### You will:

- » Select Call List from the left hand menu
- » All contacts will be displayed and in the order we will call them
- » Exception: if an action pattern does not include “contact call list”, the contacts listed within the action pattern will be notified.

### To Add Contact to Call List:

- » Click the pencil and a “Customer Call List Edit” will appear
- » Hover over person in Available Contacts and a “+” will appear next to the person to be added to the list
- » Click Done

### To Change Contacts Position to Call List:

- » Click pencil and a “Customer Call List Edit” will appear
- » Hover over person in Available Contacts and a “+” will appear next to the person to be added to the list
- » Hover over person in “List Contacts” and use ↑↓ to change the call list order
- » Click Done

You will now return to the Call List screen. The new entries will be listed at the bottom of the list. It is best not to expand the selection and select specific phone numbers to be added within the call list.

The screenshot shows the BoldNetNEO interface for a user account named 'SSASHLEY - Ashley O's Test Account'. The interface is divided into several sections:

- Left Sidebar:** Contains navigation options like 'My Dashboard', 'Customer Wizard', '1 - Central Station', 'Current', 'Open: SSASHLEY - Ashley O's Test Account', 'Details', 'Systems', 'Monitoring Services', 'Contact List', 'Call Lists', 'General Schedules', 'Open/Close Schedules', 'Activity Log', 'Comments', 'Maintenance Issues', and 'Reports'.
- Contacts List:** A table with columns 'Name' and 'Type'. It lists Ashley Olson (Contact), George (Contact), Fred (Contact), Ashley O's Test Account (Customer), and W H International Response Center (Dealer).
- Ashley Olson Profile:** Shows contact details such as Mobile (123) 456-7890, E-Mail (aolson@whirc.com), Password, Web Access ID, Web Profile, Question, Answer, Valid From, Inactive From, and CUSTOMER:OPENVOICE\_ID.
- Add On Test:** Displays Customer Status (GLOBAL:START\_DATE: 06/14/2013), Alarm (OK), Monitoring (inactive - 04/21/2017 07:57), Service (Null), System 1 (SSAshley), Area 1 (No O/C Service, No O/C Service), and System 2 (SSRICK).

In the foreground, a smaller window titled 'Contacts' shows a list of contacts including Stephanie Huston, Ashley Olson, George, Fred, Tony Hokanson, Ashley O's Test Account, and W H International Response Center. A 'Delete' button is visible next to Tony Hokanson's name. An arrow points from this button to the 'Delete' button in the main contact profile window.

Delete a contact

## SYSTEMS

The Systems section will display the current alarm system information, zones, and users. To view the information, click on the System Number, under Event Monitoring.

- » Panel Type
- » Transmitters
- » Transmitter Programming
- » Event Actions Programming
- » **Areas** – Displays any areas partitioned in the panel. This section informs you of the armed status for each area. In addition, if you have a schedule assigned to an area, it will display the schedule name and number.
- » **Zones** – Displays the list of monitored intrusion points at your location which includes zone name and corresponding zone number. Dealers can reset back to red when completing annual testing.
- » **Users** – Displays the Panel Position number (User ID), of each person with a keypad code, what areas they are allowed to access, and their name. Edit information from within the Contact List section.

This section will display your schedule information. If you click the schedule number, the pop up box displayed below will show the days of the week and the scheduled open/close times associated with that day. If there is more than 1 schedule, you can select the alternate schedules as well.

## ALARM ACTIVITY LOG

This section allows you to view summary information, sort, and view details. You may also select Advanced to search by date range, activity type, etc.

To view activity from a date that is not displayed, you can apply a filter to show you a specific day's activity.

- » Select Advanced at the top of the screen and the box displayed below will pop up.
- » Select the calendar icon to select your From and To dates and click search. Notice that when you apply the date filter, more data is displayed.
- » By default, the data is displayed in Descending order, with the most recent activity first.

Click the calendar icon to select the dates that you want to see. Here you can select specific pieces of information to display. You can select just alarms that have been handled by operators, On/Off Test entries or signals that have logged to the history, such as some open/close events.

The screenshot displays the BoldNetNEO web interface for the account 'SSASHLEY - Ashley O's Test Account'. The interface is divided into several sections:

- Home:** My Dashboard, Customer Wizard, 1 - Central Station.
- Current:** SSASHLEY - Ashley O's Test Account, 1 - Central Station, Customer Wizard.
- Areas:** A table with columns: Area, Schedule, Description, Status. It currently shows 'No Results'.
- Contacts:** A list of contacts with columns: Name, Type. The list includes: Ashley Olson (Contact), George (Contact), Fred (Contact), Ashley O's Test Account (Customer), and W H International Response Center (Dealer).
- Ashley Olson Profile:** PROFILE, USER ID, NAME & ADDRESS, Contact Points (Mobile: (123) 456-7890, E-Mail: aolson@whirc.com), Password, Web Access ID, Web Profile, Question, Answer, Valid From, Inactive From, and CUSTOMER-OPENVOICE\_ID.
- Add On Test:** Customer Status (GLOBAL START DATE: 05/14/2013), Alarm On, Monitoring Inactive - 04/21/2017 07:57, Service Full, System 1 - SSAshley, Area 1 (No O/C Service - No O/C Service), System 2 - SSRICK.

### Contacts

## Data Maintenance Issues

This section will provide you a list of issues that WHIRC encountered while trying to contact the customer.

## Monitoring Services

This section is used mainly for billing purposes. WHIRC does not utilize the system for billing. You will also see Timer Tests, Open/Closes and if WHIRC has a signed customer agreement on file in this section.

## Run a Report

This section allows you to run your own reports for a specific time period. The reports that are available to you will be listed under System Reports. Click on the report you would like to run.

## Customer Activity

A Customer Activity box will pop up. Enter in your search criteria. You may choose all activity or you may narrow it down to just Open/Close activity, alarm activity, etc. using the 'Options' feature

- » Select your date range.
- » Click Display Now.
- » Click Download

A PDF version of your report will display. You can also email the report by using the Send Email feature

Once you click Display Now and the report is ready, you will get a box prompting you your report is ready to view.

## To obtain a report only using specific information, you will need to expand Advanced:

- » Enter the account number in the To and From fields.
- » Enter the date range using the calendar icon.
- » Expand the Options section.
- » Choose information you would like to include. Blue highlighted information will be included in the report. White sections will not.
- » Click Display Now to receive an instant PDF report which will show on your screen; or
- » Enter your desired email address.
- » Click Add.

## Running Reports

If your report comes out blank, try applying a different filter or date range. If you are still unsuccessful, return to the activity log to make sure the account has the activity you are looking for. If you are still unsuccessful, you may contact our Dealer Representative for assistance at 763.477.3142; or email the dealer representative at dealerrep@whirc.com.

Customer Activity New

This report lists signal/alarm details, open and closing activity and any exception activity. Exception activity would include unexpected openings/closings, unexpected restores and the like.

From: 5/2/2017 00:00 To: 5/2/2017 23:59

CustomerName: \_\_\_\_\_

Date: 5/2/2017 00:00 5/2/2017 23:59

Activity Type:

- All activity
- Exception activity
- Open/Close activity

Dispatched:

- All
- Dispatched
- Not dispatched

OPTIONS CANCEL NEXT DISPLAY NOW DOWNLOAD SEND EMAIL

## Customer Activity Report