

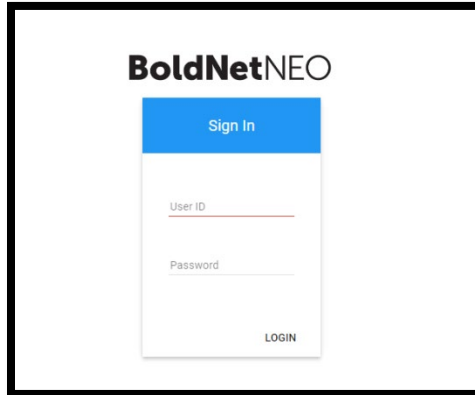


BOLDNET NEO TRAINING

Access BoldNet

- <https://dealer.whirc.com/manitou>

The following screen will be displayed.



Log In & Password

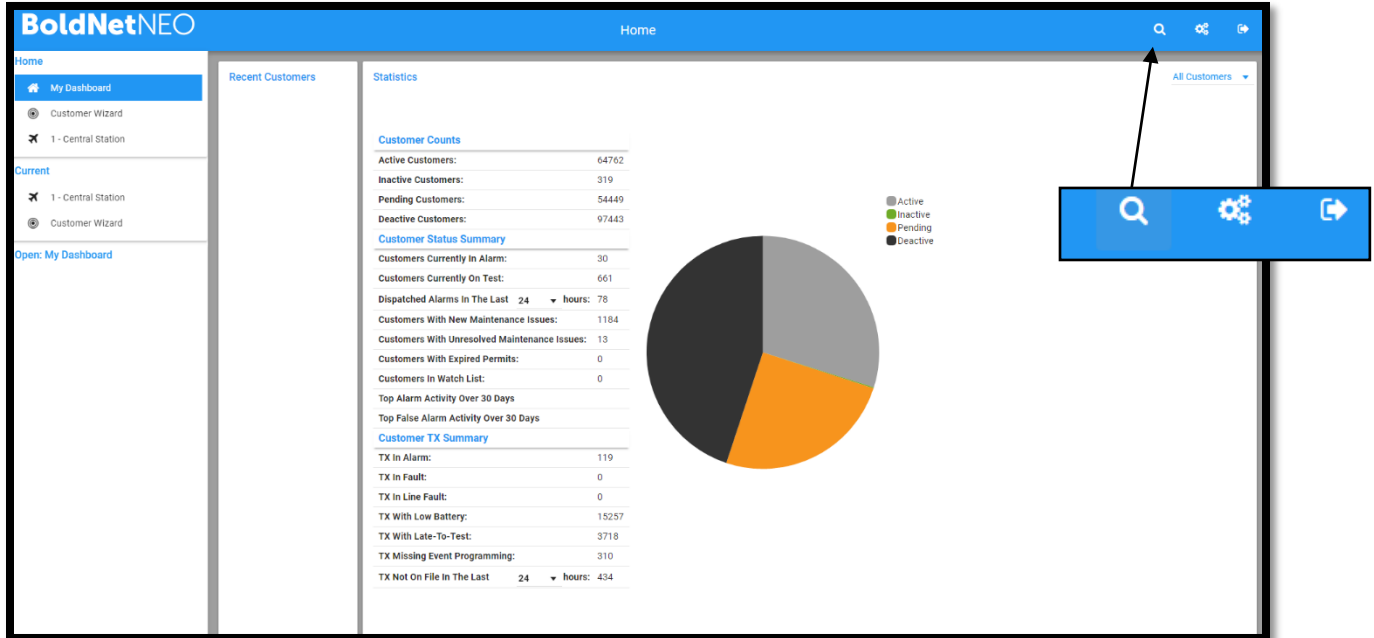
- Enter your log in information.
- Log In/Password may be obtained by contacting the WHIRC Dealer Representative.

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.

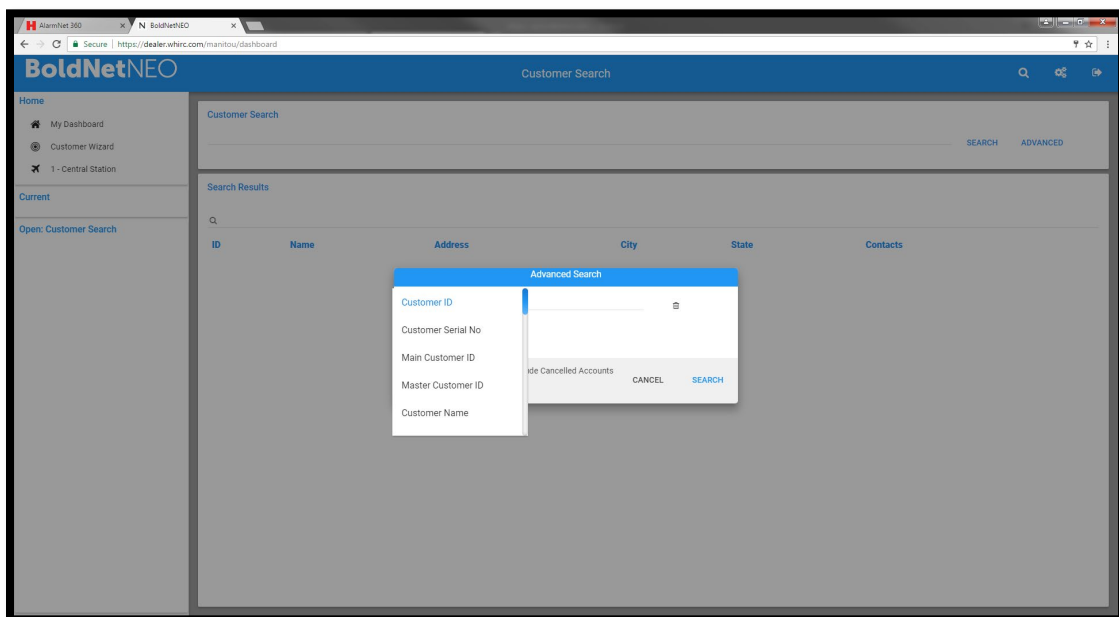
Searching

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



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.



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 Test
- View Customer Status
- View the Activity Log

The screenshot displays the BoldNetNEO interface for a customer account. The main content area is divided into several sections:

- Address:** Screen 1, 6800 Electric Drive, Rockford, MN, Zip Code 55373.
- Contacts:** Mobile (763) 777-7777.
- Customer Activity Log:** A table with columns for Date, Time, and Log Description.

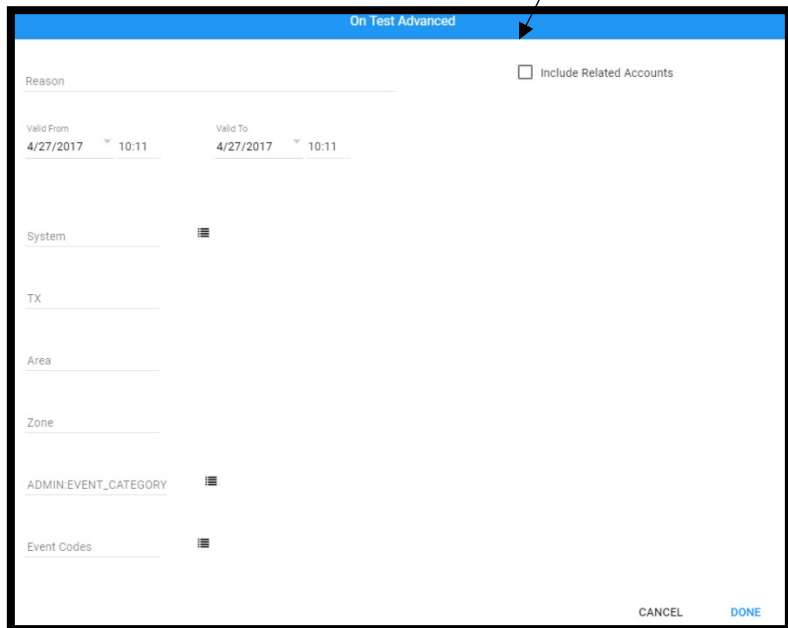
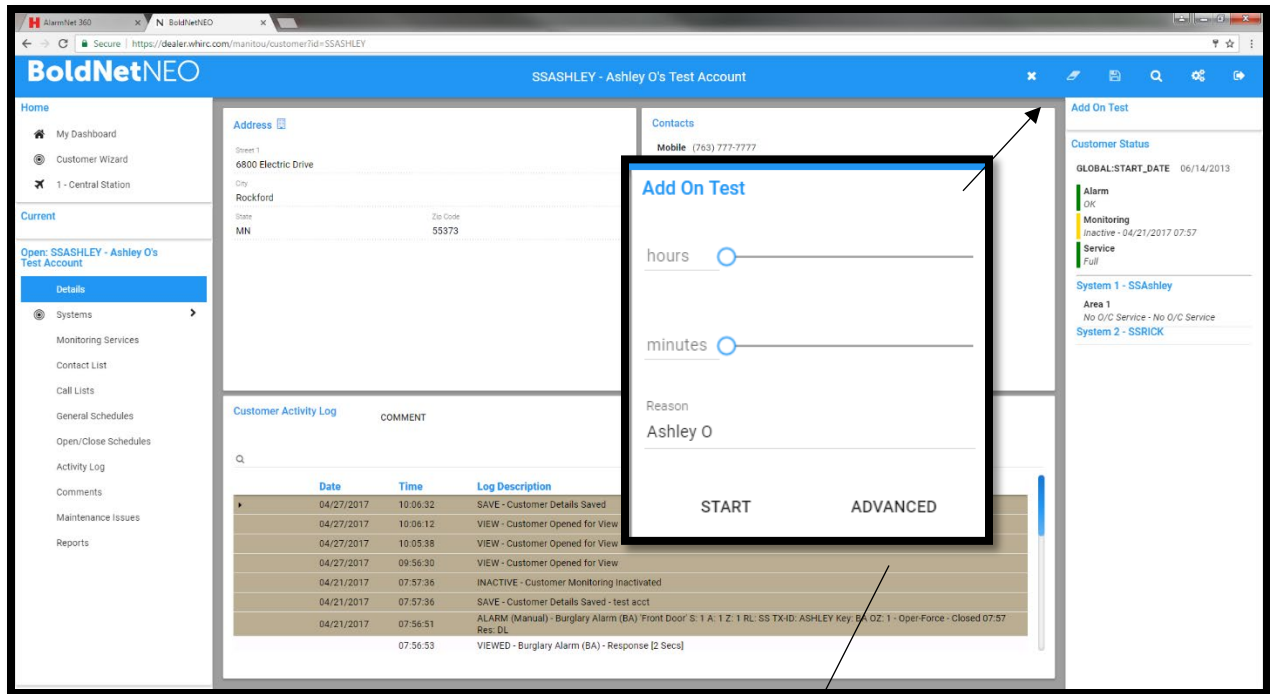
Date	Time	Log Description
04/27/2017	10:06:32	SAVE - Customer Details Saved
04/27/2017	10:08:12	VIEW - Customer Opened for View
04/27/2017	10:05:38	VIEW - Customer Opened for View
04/27/2017	09:56:30	VIEW - Customer Opened for View
04/21/2017	07:57:36	INACTIVE - Customer Monitoring Inactivated
04/21/2017	07:57:36	SAVE - Customer Details Saved - test acct
04/21/2017	07:56:51	ALARM (Manual) - Burglary Alarm (BA) Front Door S: 1 A: 1 Z: 1 RL: SS TX ID: ASHLEY Key: BA OZ: 1 - Oper-Force - closed 07:57 Res: DL
04/21/2017	07:56:53	VIEWED - Burglary Alarm (BA) - Response [2 Secs]

The right sidebar shows the **Customer Status** section with a **GLOBAL:START_DATE** of 06/14/2013 and status indicators for Alarm (OK), Monitoring (Inactive - 04/21/2017 07:57), and Service (Full). It also lists **System 1 - SSAshley** and **System 2 - SSRICK**.

To Place Customer On-Test

- Place Customer On-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 to an 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”



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 Alarm Activity Log section

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.

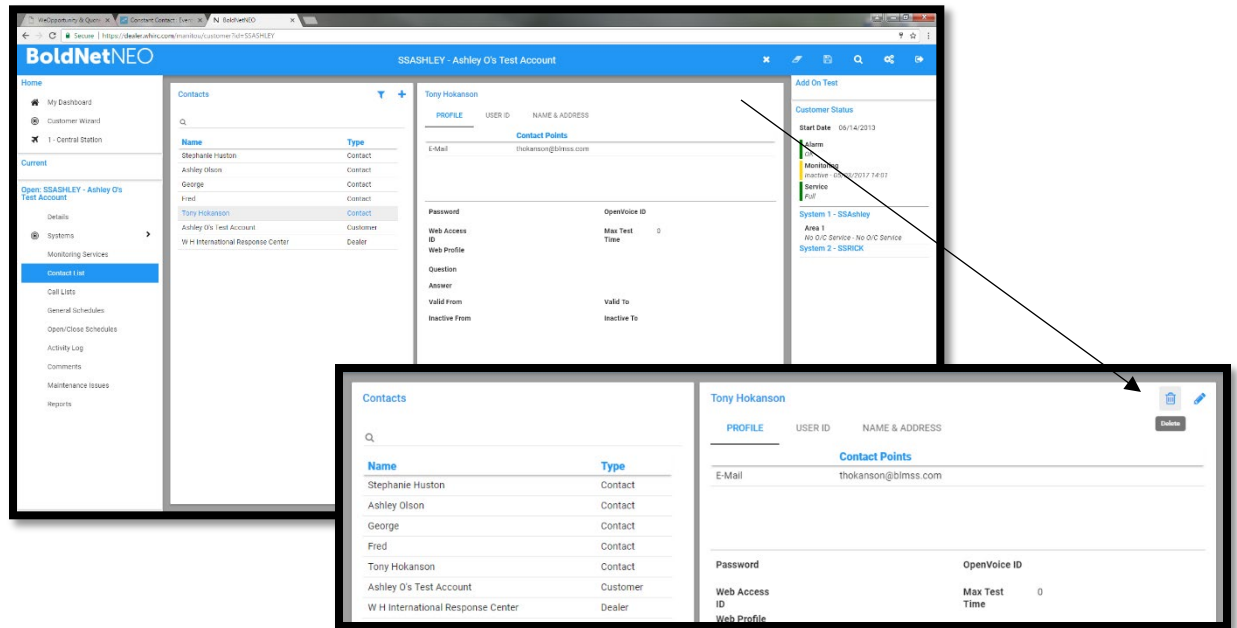
- To edit information in this section, you will need to click the contacts name and then the pencil for edit
- Contacts can be added, deleted, and rearranged

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.

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.

The image shows two overlapping screenshots of the BoldNetNEO web interface. The top screenshot displays the 'Areas' section, which is currently empty with the message 'No Results'. The bottom screenshot shows the 'Contact List' section, which is a pop-up window displaying contact information for Ashley Olson. The contact list includes fields for Name, Type, Mobile, E-Mail, Password, Web Access ID, Web Profile, Question, Answer, Valid From, Valid To, Inactive From, and Inactive To. The contact list also shows the customer status and system information.

BoldNetNEO SSASHLEY - Ashley O's Test Account

Home

- My Dashboard
- Customer Wizard
- 1 - Central Station

Current

SSASHLEY - Ashley O's Test Account

Areas

Area Schedule Description Status

No Results

BoldNetNEO SSASHLEY - Ashley O's Test Account

Home

- My Dashboard
- Customer Wizard
- 1 - Central Station

Current

SSASHLEY - Ashley O's Test Account

1 - Central Station

Customer Wizard

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
- Reports

Contacts

Q

Name	Type
Ashley Olson	Contact
George	Contact
Fied	Contact
Ashley O's Test Account	Customer
W H International Response Center	Dealer

Ashley Olson

PROFILE USER ID NAME & ADDRESS

Contact Points

Mobile (123) 456-7890

E-Mail aolson@whirc.com

Password CUSTOMER:OPENVOICE_ID

Web Access ID Max Test 0

Web Profile Time

Question

Answer

Valid From Valid To

Inactive From Inactive To

Add On Test

Customer Status

GLOBAL:START_DATE 06/14/2013

Alarm OK

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

-3 of 3

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 Test entries or signals that have logged to the history, such as some open/close events.

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.

The screenshot shows a web form titled "Customer Activity New". At the top, it states: "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." Below this, there are fields for "From" and "To" with a calendar icon, a "CustomerName" field, and a "Date" field with a date range of "5/2/2017 00:00" to "5/2/2017 23:59". There are two sections of radio buttons: "Activity Type:" with options "All activity" (selected), "Exception activity", and "Open/Close activity"; and "Dispatched:" with options "All" (selected), "Dispatched", and "Not dispatched". At the bottom, there are buttons for "OPTIONS", "CANCEL", "NEXT", "DISPLAY NOW", "DOWNLOAD", and "SEND EMAIL".

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.

