

# **Manitou - BoldNet Neo Dealer Training Guide**

BoldNet Neo is a new way for you to access information about your account online. We are excited to share with you the many ways this system can help you do your work better every day working with your Monitoring Company as they transition to Manitou.

BoldNet Neo is the Web interface for the new Manitou software Your Monitoring Company is in the process of deploying in their Monitoring Center. This software system is powerful and offers a more dynamic way to ensure quality service of your customers' signals. Some features that set this system apart are:

- Enhanced Action Patterns that allow logic that guide operators intelligently through the steps of their alarms.
- General Schedules ensure appropriate alarm processing based on the day of the week and time of the day.
- Transmitter Programming Commands that allow the system to intelligently delay or verify signals.
- **Reminders** that can generate alarms with automatic notifications for inspections or other regularly timed services.
- Maintenance Issues that allow you to follow up on customer requested service and changes.

With BoldNet Neo, you can:

- Update account information online or through the mobile app at any time.
- Access powerful reports that can be emailed or downloaded to your computer.
- Access account history and see exactly what the central station dispatchers see.
- Review and update your current contact list, account specific instructions, and authorized employees.
- Control your information and when it's updated.
- Save time when you no longer have to contact your central station for account updates and changes.



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# Logging into BoldNet Neo

Your Monitoring Company will provide you with the web address for your BoldNet Neo login. You can use a desktop browser, laptop, or a tablet. Please be aware that this is currently optimized for Google Chrome. It will run in other browsers like Internet Explorer or Mozilla, however, the design is written under the Google Material design specification so it is best viewed and used in Google's Chrome browser.

# **BoldNet**NEO

Sign In	
User ID	
Password	
LOGIN	

## **The Dashboard & Settings**

Upon logging into BoldNet Neo, you arrive at the Dashboard view. There you see your recent customer, your watch list and your statistics.

SOUND SECURITY	SNS - Safe & Sound Security	Q, 📽 🕩
STANDARD		
My Deshboard		
Customer Wizard Recent Customers	Statistics	🔯 Include Subdealers
SNS - Safe & Sound Security		
and .		
SNS - Safe & Sound Security		
Common Manual		
Controller Highes	Continues County	
	Artise Contemport	
	Inartive Contomers 0	
	Pending Customers: 0	tive
	Deactive Customers: 1	ctive
	Customer Status Summary	nding
	Customers Currently in Alarm: 1	
	Customers Currently On Test: 0	
	Dispatched Alarms In The Last _ + hours: 0	
	Customers With New Maintenance Issues: 1	
	Customers With Unresolved Maintenance Issues: 0	
	Customers With Expired Permits: 1	
	"Curtomers: 1	
	Top Alarm Activity Over 30 Days	
	Top False Alarm Activity Over 30 Days	
	Customer TX Summary	
	TX In Alarm: 3	
	TX in Fault: 0	
	TX in Line Fault: 0	
	TX With Low Battery: 2	
	TX With Late-To-Test: 1	
	TX Missing Event Programming: 0	
	TX Not On File in The Last	
	-	
Customer Watch Liet		
SNS1002 - Bold Technologies	List .	

## Dashboard

The main Dashboard page shows you a lot of very useful information.



First, the graph shows a breakdown of the customer records showing the number of Active, Inactive, Pending, and Deactivated records.

Next, the statistics list the same information in a clickable format, where you can see a listing of your customers based on their status or if they were currently in alarm, on test, dispatched within a recent time period, had a low battery or late to test, or if the customer had a Maintenance Issue attached to it.

All of these allow you to navigate directly into the customer record from this page.

On the left-hand side you have your navigator. There you can quickly navigate to quick access features and open items.

Across the top you see that it is possible to have your company logo. To add your logo to your page:

- Click your Dealer Name on the left-hand navigator.
- Click Branding.
- Click Upload.
- Locate your image file. (We suggest you use a PNG file with a transparent background. For optimal results logos should rectangular and a 5:1 width to height ratio. For example 264px by 52px, 528px by 104px, 1056px by 208px)
- Choose the default background color for your login and for your customers.

Home	
<b>6</b> 26	My Dashboard
۲	Customer Wizard
	SNS - Safe & Sound Security
Currer	nt
6.	SNS - Safe & Sound Security
۲	Customer Wizard



• The save icon flashes in the upper righthand corner to remind you to save. Click it to commit your changes.

## Settings

The settings form allows you to customize your personal experience. This is found under the cog icon and here, when allowed, you can choose your own header color, change your password, and set the help information to beginner so that many of the option buttons expand to show their full description. This also shows who you are logged in as and to what system you are connected. Many forms show an X at the top to close them when done.

≡ SAFE & SECURITY		SNS - Safe & Sound Secu
ne	Logo	
My Dashboard	SAFE & CUDCUT TO BUDY	SAFE & CULCULUS LANK
Customer Wizard	SOUND SECURITY	SOUND SECURITY
SNS - Safe & Sound Security		
rent	OPLOAD	DEPAULI
SNS - Safe & Sound Security	Dealer Color	Customer Color
Customer Wizard	Pink	Pink
	Purple	Purple
en: SNS - Safe & Sound urity		
Details	Deep-Purple	Deep-Purple
Contact List	Indigo	Indigo
General Schedules	Rhue	Dhus
Call Lists	Bitte	Bide
Transmitter Types	Light-Blue	Light-Blue
Programming	Cvan	Cvan
Comments		
Billing	Teal	Teal
Action Patterns	Green	Green
Maintenance issues		
Control Panels	Light-Green	Light-Green
Reverse Protocols	Lime	Lime
Reverse Commands	Vallow	Vellow
Reports		1 CHOW
Statistics	Amber	Amber
GPS Tracking	Orange	Orange
Branding		
	Deep-Orange	Deep-Orange
	Brown	Brown
	Blue-Grey	Blue-Grey

≡ SAFE & SECURI	IY	Settings	×	B	۹	¢	6
Here: Waterback Control Without Standy Control Without Standy Control Without Standy Standy Standy Standy Control Without Standy Contr	Optime Mensel Lanced Strugger Owner Lanced Strugger Mensel Lanced Strugger	Dany Mat Page May May May Lyft dar Cym					
	Nar B Productor And Name Capito Ngua Annal Adamas Ingga Processing of A	Hai Bean Light Gean Linn Mither Adhar Adhar Adhar Adhar					
	Application Information Version: 2.00.6417.825 App Sover Consentian: Evolution 0;	Reson Mue Gwy					

## **Searching for Customer Records**

Customer Search © Customer O Dec Dectr Drivis and	eler 🔘 Brench 🔘 Agency 🔘 Authority 🔘 Olobei Keyholder				* SEARCH ADVANCED
Search Results					
Q.					
10	Name	Address	city	State	Contacts
SN51234	Bob Smith	123 street	Colorado Springs	00	
SN51002	Bold Technologies Ltd.	421 WINDCHIME PL	Colorado Springe	00	
SN51001	Garden of the Gods Senior Community	3920 E. San Miguel ST	Colorado Springs	00	
SN51483	London Village	23 Illinois Avenue	Annandale	WA.	
SN51103	William Palmer University	14 East Cache La Poudre St	Colorado Springs	00	
					Rows: 10 + 1-5 of 5

One of the two most common reasons for your entering BoldNet Neo will be to review your customers. Finding customers in BoldNet Neo is quite simple and can also be complex. We already covered how to quickly drill into a customer record through your statistics. But, if your customer is not easily accessible in your statistics, it is still easy to

find them using the search features in BoldNet Neo. To launch the search feature click the search icon in the title bar. There you can type any letters or names that you wish to find the customer you seek. Remember! Less is more!

The customer search looks for the typed letters, in the order typed, within the ID, Name, Address, Contacts, Password, and other, Customer fields.

It is also possible to do an advanced search with several search parameters by clicking the word Advanced. Here you can enter different parameters and together narrow down the results.

Advanced Search						
Customer Name	▼ = <sup>Bold*</sup>	<u> </u>				
Street 1		<u> </u>				
ADD						
Max Rows Per Query 2000	Include Cancelled Accounts	CANCEL SEARCH				

Once you find the customer you want, a simple click loads that customer record into your screen.

			Advanced Sear	ch			
Customer	Name	▼ = <sup>Bo</sup>	old*			8	
Street 1		• 42	21*			÷	
ADD							
Q							
ID	Full Name	Address	City	State	Street 2	<b>Contact Point</b>	Monitoring Status
SNS1002	Bold Technologies Ltd.	421 WINDCHIM	IE PL Colorado Springs	Colorado	Suite 100	(719) 593-2829	
						F	Rows: 10 🔻 1-1 of 1
		Max 200	Rows Per Query 00	Include	Cancelled A	Accounts CAN	ICEL SEARCH

## **Getting to know the Customer Record**



Customer Status Start Date 03/16/2017 Alarm In Alarm(1) - Zones Un-Restored Monitoring Active - 03/16/2017 17:25 UL Grade CSBG - Response Time: 10 Maintenance Unresolved Maintenance Issues Service Full System 1 - Burglary System Area 1 Open - 04/05/2017 15:57 Area 2 Open - 04/03/2017 13:53 Area 3 Close - 04/03/2017 13:53 Area 4 No O/C Service - No O/C Service Once the customer record loads, it loads to the main customer page. The first thing you will notice is there is that now more information showing in the lefthand navigator. These items make up the pages of the customer record. The right-hand side of the view is the status of the customer record. Notice there is color coding of items; such as the fact that there is currently an alarm active for the account, an outstanding Maintenance Issue, and the account is currently in Full Service (nothing is On Test). Also each Area (partition) shows its Open or Closed Status with a date and time of the last status change. Notice also, there is an "Add On Test" showing on the top. We will discuss that a bit later.

### **Details Form**

The main customer page is called the Details page. The details page contains "4 cards." These four cards house all the information specific to the basic customer record. This includes the Account ID, Name, and Address details.

- When you hover your mouse over the card three icons display.
- The eye icon adds and removes the customer from your Watch list. This list is for all people authorized to access BoldNet Neo for your company.
- The pencil icon places you in edit mode to make changes to this card. This icon only displays when you have the permission to make changes to this card. This is true of all cards within BoldNet Neo.
- The ellipses (three dot) icon expands the card to display additional information. For this card it would display customer level passwords, accounting information, when applicable, and cross street and subdivision information.

# Details			Þ	<i>.</i>	
Serial No	13				
Account Type	Normal				
Related Type	Normal				
Country	United States of America				
Language	English (United States)				
Time Zone	Mountain Time (US & Canada)				
Street 1 421 WINDCHII	ME PL				
Street 2 Suite 100					
City Colorado Sprin	gs				
State Colorado	2.p 80	Code 1919-1984			

The Contacts card contains the site specific contact points. Below the Contacts card is the Authorities/Dealer/Branch card with contains all businesses and Authorities having jurisdiction which relate to this account.

Contact	S		
¢.	Site (719) 593-2829		
2	E-Mail sales@boldgroup.com		
Authorit	ies / Dealer / Branch		
Police	CSPD - Colorado Springs Police Department	Dealer SNS - Safe & Sound Security	
Fire	CSFD - Colorado Springs Fire Department	Branch	
Medical	AMRCS - American Medical Response Colorado Spr	ings	

The remainder of the Details form is an abbreviated view of the Customer Activity Log. This is a fully functioning activity log where you can search and look up activity and find what you are seeking first thing.

Here you can use the search field to look for specific text and even do an advanced search for a specific date and time or event.

You can even add a comment to the activity. Remember, be judicious here. Any comments added are part of the permanent record.

## **Systems Form**

Date	Time	Log Description	
08/31/2017	16:43:34	VEW - Customer Opened for View	
08/31/2017	16:19:28	SIGNAL (Manual) - Technician Check-In (*TCI) Maintenance (System Cleaning)' S: 1 A: 1 RL: SUR TX-ID: 1001 Key: *TCI	
	16:19:29	NOTIPY Dealer - Safe & Sound Security at E-Mail [sales@safeandsoudsecurity.com] - Result: Error	
	16:19:29	MESSAGE - Hello, Enclosed is your requested . Have a nice Day.	
08/31/2017	16:19:28	MAINTENANCE ISSUE #9 - Status: Resolved - Cause: User entered - Done	
08/31/2017	16:19:04	VIEW - Customer Opened for View	
08/30/2017	22:00:01	SIGNAL - Late-To-Close (*LC) S: 1 A: 2 Key: *LC OA: 2	
08/30/2017	14:20:32	VIEW - Customer Opened for View	
08/30/2017	14:20:31	VIEW - Customer Opened for View	
08/30/2017	14:20:31	VIEW - Customer Opened for View	
08/30/2017	14:20:31	SAVE - Customer Details Saved	
08/30/2017	14:20:31	VIEW - Customer Opened for View	
08/30/2017	14:20:31	VIEW - Customer Opened for View	
08/30/2017	14:19:41	VIEW - Customer Opened for View	
08/30/2017	14:19:40	VIEW - Customer Opened for View	
08/30/2017	14:19:40	VIEW - Customer Opened for View	
08/30/2017	14:19:40	SAVE - Customer Details Saved - added back image	
08/30/2017	1419-40	VEW - Customer Onesed for View	

The next form of interest is the Systems form. The Systems form contains all the systems and equipment housed at the monitored location. Different from other software systems, Manitou software can manage all monitoring equipment on a single account.

Hint: If the zones are the same and there happens to be two or more transmitters (dialers), then the equipment would be on the same system. If the equipment has different zones and are managed differently, then they would be different systems. This form contains three cards that display information about the monitored systems.

The upper left-hand card contains the system details.

1 - Burglary	/ System
Panel Type	VISTA10P - Vista 10P SIA
Max TX	No Limit
Max Areas	No Limit
Max Zones	No Limit
Max Devices	s No Limit
Max Users	No Limit

These details show the control panel details including the maximum transmitters, areas, zones, devices, and users.

The upper right-hand card contains the Users, when configured, which have access to the system.

Users				
Q				
User ID	Area	Description	Contact ID	Name
5	*			Alfred Lyons
9	*			Miriam Estrada
				Rows: 10 🔻 1-2 of 2

The lower card contains the transmitters (dialers) configured for that system.

TX Summa	ry .					
Q.						
TX No.	Description	TX ID	Type	Prefix	Protocol	Enabled On
1	Commercial Burg	1001	DFLT	SUR		
2	Wew Now	2920	DFLT	IVN		
						Rows: 10 • 1-2 of 2

## **Transmitters**

The Transmitters, underneath the Systems form also contains three cards.

The upper left-hand card contains the Transmitter details:

1 - Commercial Burg	SUR/1001		
TX No	1	Caller ID 1	
Description	Commercial Burg	Caller ID 2	
TX ID	1001	Remote Address	
Receiver Line Prefix	SUR		
ТХ Туре	DFLT		
TX Protocol Type			
TX Dates		Sensor Offset	
Path Enabled		Area Offset	
Connect Date		Zone Offset	
Termination Date		Sensor Offset	
TX Test			
Interval	0 Minutes		
			Including the ID, prefix, Caller ID details ar

Bold Group

#### The upper right-hand card contains the Transmitter options:



These options can be expanded to reveal what each one means.

The lower card contains any notes that are specific to the transmitter. Often, these are used to list the location of the control panel within the location, MAC addresses, and other system specific information.

#### Areas and Zones

The Areas and Zones under a system list all the points as well as the status of anything unrestored.

	Schedule		Descript	lan			Status		
	Al		Develope	nerty Training Sale	🗢 Quen				
	001		Support				😑 Open		
1	All		Events	Office / Training R	loom		<ul> <li>Ocean</li> </ul>		
			Added by	Syni Hendler			Dilmout		
								Ross: 10 + 1-4 of 4	
85									
DOM SYST	IN TEST OVERVIEWSTERN T	17							
1.									
	Zone De	oription			Signal .	Test Signals	Expected Signals		
	1 0	of Door			Received	4	0		
	1 10	at Door Her Door			Received     Received	4	0		
	1 9 2 0 3 8	et Door eter Door et Door			Received     Received     Received	1	0		
	1 0 2 0 3 0 4 P	et Door Her Door H Door e Smulie Detector 1			Received     Received     Received     Received	4 1 1 0	0 0 0		
	1 8 2 0 3 6 4 P 5 P	et Door Her Door et Door e Smule Detector 1 e Puil Station 1			Peceraer Peceraer Peceraer Peceraer Peceraer	4 1 1 0 0	0 0 0 0		
	1 10 2 0 3 6 4 R 5 R 6 R	et Door Her Door It Door It Smalle Detector 1 It Puil Station 1 It Smalle Detector 2			Pecerular     Pecerular     Pecerular     Pecerular     Pecerular     Pecerular     Pecerular     Pecerular     Newer Teccrular	4 1 1 0 0	0 0 0 0 0		
	1 9 2 0 3 0 4 R 5 R 6 R 7 R	et Door Her Door It Door It Door It Shoke Detector 1 It Puil Station 1 It Shoke Detector 2 It Puil Station 2			Rest-of     Rest-of     Rest-of     Rest-of     Rest-of     Rest-of     Rest-of     New Rest-of     New Rest-of     New Rest-of	4 1 3 0 0 0	0 0 0 0 0 0		
	1 8 2 0 3 5 5 5 7 8	at Door nter Door et Door e Sinuise Detector 1 e Puil Station 1 e Sinuise Detector 2 e Puil Station 2			Restrict	4 1 0 0 0	0 0 0 0 0 0 0		
n en	1 8 2 0 3 0 4 9 5 8 6 0 7 9	et Door nter Door et Door e Sinuise Detector 1 e Put Station 1 e Sinuise Detector 2 e Put Station 2			Access	4 1 0 0 0	0 0 0 0 0 0 0		
n n n n ne Status	1 8 2 0 3 6 4 8 5 8 6 8 7 8	et Door eter Door et Door e Smuke Detector 1 e Smuke Detector 2 e Puil Station 2			foorer	4 1 0 0 0	0 0 0 0 0 0 0		
ne Status	1 8 2 0 3 6 4 6 5 8 6 8 7 6	et Door der Door et Door e Smuke Detectur 1 e Pul Station 1 e Smuke Detectur 2 e Pul Station 2			Posted     Posted     Posted     Posted     Posted     Posted     Posted     Posted     Posted	4 1 0 0 0	0 0 0 0 0 0 0		
ne Statue	1 8 2 0 3 0 4 9 5 8 7 8 7 8 7 8	nt Door ter Door et Door e Smule Ontextur 1 « Pul Dation 1 e Pul Dation 2 e Pul Dation 2	Area	Zone	Process     P	4 1 0 0 0	0 0 0 0 0 0		
ne Statue	1 8 2 0 3 0 4 7 5 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7	st Door eter Door It Door Einwise Detector 1 Puil Dation 1 Einwise Detector 2 Puil Dation 2 Fuil Dation 2 TX 1	Area	Tone	Incored     I	4 1 1 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		
ne Status kent	1 8 2 00 4 P 5 P 7 P 6 P 7 P	at Door eter Door et Door et Door e Smake Detector 1 e Smake Detector 2 e Put Station 2 Put Station 2 1 1	Arms 7 1	Zone 1	Proceed     Accent     Proceed     Pr	4 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		
ne Status eetil	1 8 9 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	at Door ter Door et Door e Door e Puil Station 1 e Puil Station 1 e Puil Station 2 e Puil Station 2 FX 1 1 1	Area 1 1	Enne 1 4	Proceed     P	4 1 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		

## Programming

The Programming cards allow for signal translations and the assignment of action patterns to events.

Dest	Merged TX Programy	ning for T.K										
Non	e											•
Q TX	Inout Event	Innut Area	Innut Zone	Innut Sensor	Output Event	Description	Output area	Output Zone	Output Sensor	Point ID	Commands	Help
+	RA		*	*	RA	Bumlary Alarm		-			CanCancel/BR*600 Yes)	
	RA1				BA1	Perimeter Burg					Confirmed(0, BV 300)	
	BAS				BAB	Burg Near Alarm					CanCancel(BR.*. 300, Yes)	
	BA9		*		BA9	Intrusion Verifier					CanCancel/BR.*. 300. Yes) Confirmed(0. BV. 300)	
	BR				BR	Burglary Restoral					Cancel()	
	RN				RN	Remote Repet					ResetTimeout(BA)	
2	RA				RA	Bumlary Alarm					CanCancel/BR * 200 Ves)	
2	RA1				RA1	Perimeter Burg					Confirmed(0, RV 300)	
2	BAS				RA8	Rum Near Alarm					CarCarcel/BR * 300 Ves)	
2	PAG				PA9	Intrusion Verifier	-	-	-		CasCascel/BR * 200 Yea) Confirmed(0.BV200)	
Event	t Programming						Р	ost Processing				
Event	l Programming	1					P	fost Processing				
Event Q Even	t Programming	Area	Zone	Alarm	Action ID	Instructions	P	lost Processing D. Event	Zor	50	Action ID	
Q Event *A	t Programming nt TX	Area	Zone	Alarm Default	Action ID OPENEYE	Instructions	P	Nost Processing Q. Event 8T	Zor	50	Action ID NOTICE	
Q Q Ever *A BA4	t Programming nt TX	Area * 1	Zone *	Alarm Default Default	Action ID OPENEYE G4AV	Instructions		Nost Processing Q. Event BT	Zor	50	Action 1D NOTICE Boo	rs: 5 • 1-1 of 1
Q Event *A BA4 BA5	t Programming nt TX * *	Area - 1 1	Zone * 1 3	Alarm Default Default Default	Action ID OPENEYE G44V G4PLAN	Instructions Rows: 5 ¥	1-3 of 3	lost Processing २. Event 87	Zor ,	10	Action 10 NOTICE Rev	ns: 5 ¥ 1-1 of 1

Post processing allows you to send emails and other automatic notifications after an alarm closes.

#### Devices

The Devices cards allow for the configuration of cameras, such as I-View Now for access during alarms.



#### **Reminders**

The reminders for can be used to create alarms and Maintenance issues at a periodic time for things like annual fire tests or to verify the existence of generator tests.

## **Action Patterns**

Action Patterns are the step-by-step instructions provided to the alarm operators when alarms present to their screens. BoldNet Neo shows these within the customer record when configured on the customer. It is also possible to view the items configured on your Dealer record, and even those created globally.

New to the ManitouNEO version, monitoring companies may now add logic to the action patterns so that managing things such as times of the day, or even the number of times an event occurs, can change how an event behaves. These are called Enhanced Action Patterns.

It is also possible to mask action patterns to allow them to read more simply for an operator or even for a customer to better understand how an operator will manage their signals.

Below is an example of a video verification action pattern first as it is programmed for its logic and then masked for understanding.

Action Patterns	04 - Burglat Action Review Video	
Cashamar		BR Marinel
- Default	SHOW PLANS     COMMAND TO COMPANY STREAM CALLS THE COMPANY AND A STREAM CALLS	
OPINIPE-Combil	3. COMMENT TO CLASTICATER DEVICE STREAME CAME TO PLACE CAMERA IN	
	<ol> <li>PROMPT TANK THEM A VIEWAR THE APPENDIX</li> </ol>	
- 7-19W	<ol> <li>LON: THE OPDING TO DRIVEN A DEL THIRAT.</li> </ol>	
T2 Medical	7. — bitact peril	
	8 = Gall + A	
* 3 Perchald grounds	<ul> <li>Late Tetal</li> </ul>	
- à theolar intrusion	N. PROMYT DESCRIPTION SAME - UNITED (TOP)	
	11. UNI THE OPENITOR SAW (OCTO	
94-Eurojar Antoin	B. CONTACT FOLCE	
GARY-August	TA CONNET CUTOARE	
	14 CONTINCT CULTONER REPAILED	
OW, MIL TIME FILM FIL	18. GOM ALAM INTERDUCTION	
" 1: Supervisory	16. = CAIE - NO	
	0. LABL DOB	
······································	18. COME activity anti-Histochica for	
NUTUE - Alert Cotteet R.	PL = CARE + UNDONTIFIED	
	38. CONNECT TO CUSTOMER DEVICE 100.00C CAND (30.20C CANDIA 2)	
- In Think Constitute	21. PREMIT & THERE A VUBLET MEAT ADM - gittelial New (POLUST)	
Dealler	23. LOG ATTER FURTHER OBSERVATION THE OPERATOR WAS ABLE TO DESIGN A SOUTHOUSE THREAT OF THREATHON	
Contegers	II = F (Della Page - MS	
	S4 JAMP TO: TOWERT	
	B.= 8.0	
	28. JANF TO CLIME	
	23. 846.9	
	28 = 07-dBardd	

action Patterns	G4 - Burgiar Action Review Video
Dustomer	
Default	1. DISPLAY THE PLANS FORM
Densiti	2. PULL UP THE CAMERA
OPENEYE - OpenEye	3. PULL UP ANOTHER CAMERA
TI Cire	<ol><li>WAS THERE A THREAT?</li></ol>
1. File	<ol><li>INSERT THE INFORMATION ABOUT WHAT YOU SAW INTO THE ACTIVITY.</li></ol>
2: Medical	<ol><li>THE SYSTEM SELECTS THE 'WAS THERE A THREAT' INFORMATION AND MAKES A DECISION.</li></ol>
	8 WHEN THERE IS A THREAT
3: Panic/Holdup/Duress	9. HERE IS THE LABEL THREAT FOR THE JUMP TO IF NEEDED.
4: Burglar/Intrusion	10. DESCRIBE WHAT YOU SEE IN THE VIDEO
even Stone	11. WHAT YOU SEE IN THE VIDEO IS LODGED INTO THE CUSTOMER LOG.
G4 - Burglar Action	12. CALL THE PD
G4AV - Avigilon	13. CALL THE CUSTOMER
and the second of the	14. CALL THE RESPONSIBLE PARTIES
G4PLAN - Video Floor Pla	15. CLOSE THE ALARM
5: Supervisory	16 WHEN THERE IS NO THREAT
and the second second second	17. HERE IS THE LABEL 'NO THREAT' FOR THE JUMP TO IF NEEDED.
6: General/Trouble	18. NO THREAT CLOSE THE ALARM
NOTICE - Alarm Contact R	19 WHEN THE YOU ARE UNSURE OF THE THREAT
nee needen ander een	20. CHECK OTHER CAMERAS FOR MORE INFORMATION
99. Library: <default></default>	21. DO YOU SEE ANYTHING THREATENING?
Dealer	22. WHAT YOU SEE AFTER VIEWING THE ADDITIONAL CAMERAS LOGS INTO THE ACTIVITY LOG
Company	23 WHEN THE THREAT IS VISIBLE
	24. GO BACK AND CALL THE POLICE (JUMP TO THE LABEL THREAT)
	25 WHEN THERE IS NO VISIBLE THREAT
	26. JUMP TO THE NO THREAT LABEL
	27. DONE WITH THE UNSURE SECTION
	De - OTLEDUSCE

It is also possible to set specific actions to automatically run to further automate the process. For example, the Display the plans, and launch the two cameras can happen automatically, then the prompt can display for the operator to make a decision. This provides the operator with all their key information, up front, and prompts them for a decision.

Your team at Your Monitoring Company can arrange additional training for you if you wish to become involved with building your own Action Patterns.

## **Monitoring Services Form**

The next form of interest for you will be the Monitoring Services form. Based on the data entered on the other forms of the customer record, the Monitoring Services form loads with the services available to the account. Your individual billing may vary. Please not that this form has several different views based on your selection. The default view is Event Monitoring. To change your view, click the drop down list and select the other Types such as: Customer, Access Control, GPS Tracking, or Other.

Monitoring Services	Monitoring Service
Workship Service Drug	Service Level System
Event Monitoring	Munitoring Type Alarms Only
System TX Monitoring Type	System 1 - Burglary System
1 Alarma Only	Senice Level Monitor
1 Video Monitoring	Mex TX No Limit
1 Open/Close (Log)	MaxAreas No Limit
1 Oper/Close (Log)	MaxZones No Limit
1 Oper/Close (Log)	MacDevices No Limit
1 6 Hour Reminder	Mactivers No Limit
	Active Date Range Start End

## **Contact List Form**

The Contact List form contains all persons and entities that have access to the customer record. This includes the customer itself, the keyholders and contacts, authorities having jurisdiction (or PSAPs), guarding, or other, agencies, branches, and the like.

Contacts		Alfred Lyons DSuppress	
q		PROFILE USER ID NAME & ADDRESS WEB MEMBERSHIP USER DEFINED FIELDS	
Name	Туре	Type Contact Points	
Alfred Lyona	Køyholder	Moble (719) 332-7256	
Miriam Estrada	Keyholder	Push Notification (719) 332-7256	
Das Dalwy	Keyholder		
Mite Balley	Keyholder		
Judith Herris	Keyholder		
Tamara North	Køyholder	Permissions Suspended	Show A
Carle	Køyholder	Can Open/Close Within Schedule	
Jim Taylor	Køyholder	Can Open/Close Hithin Temp Open Window	
Onietza Wallor	Køyholder	Can Open/Dose Anytime	
Ben Bass	Keyholder	Can Cancel Alarm	
Lycia Hilatrome	Keyholder	Can Authorite a Schedule Change	
Apple QA	Køyholder	Can Put Designated System/Areas On Test	
Bold Technologies Ltd.	Customer	Can Edit Customer	
Safe & Sound Security	Dealer	Can Give Out Customer Information	
American Medical Response Colorado Springs	Medical		
Colorado Springs Fire Department	Fire		
Colorado Springs Police Department	Police		
		Passward 2710 OpenValue ID	
		Web Access ID Max Test Time 0	
		Web Profile	
		Quarter	
		low	
		No	
		Valid From Valid To	
		Inactive From Inactive To	
		4	
Attentions	Contract		
American ryge	Contact		
mode Maline			
Benefic			
Dissis			
Custonal			

The people on the contact list are automatically assigned permissions based on some basic standards. For example, if a person has a password and the account is commercial, they get Can Cancel an Alarm and May Place the Account On Test, while if the account is Residential the password only allows for them to Cancel an Alarm. If they are assigned a User Number they are allowed to Open/Close within a Schedule.

When eq	diting.	or adding.	a contact there	are several	items ava	ailable.
which co	arcing,	or udunig,	a contract there	are several	iteriis ave	madic.

Contact Edit - Miriam Estrada									
PROFILE	CONTACT POINTS	USERID	NAME & ADORESS	WED MEMORIPAR	000	R DEFINED FRELDS			
Access			Credentials						
Permissions Suspended Con Open/Close Within Temp Open Window Con Open/Close Within Temp Open Window Con Cancel Cose Argine Con Cancel Adam Con Autoricise & Schedule Change Con Cancel Adam Con Autoricise & Schedule Change Con Part Estime Customer On Test Con Data Designated System/Vices On Test Con Data Designated System/Vices On Test Con Data Customer Information		90aa 48 	Pauloof APPLES WebArens 0 TREES WebArdin Administrator	OperVace ID No to the O					
Notes									
Question			Answer						
Availability Valid From			Valid To			•			
Inactive From			Inactive To			•			
					CANCEL	NEXT DONE			

The dots across the top are called waypoints. Each represent an individual page. The Details page contains the permissions, passwords, Web Access ID, Web Profile, Notes, Question and Answer (which can be used to validate a user), and availability and inactivity dates.

Clicking Next moves between the waypoints.

Contact Edit - Mirlam Estrada								
PLOFILE	CONTACT FORME	USERIO	NAME & ADDRESS	WE MEMERICAN	UDER SOMED FIELDS			
Phone Numbers								
Туре	Phone Number	Extension	Script	Schedule	Private			
Business	(719) 336-1248		Script	* No Schedule	× D			
Push Notification	* (719) 964-4859		Script	* No Schedule	× • •			
ADD								
Email Address								
ADD								
Web								
ADD								
				CANCEL PREVIOUS	S NEXT DONE			

The Contact Points waypoint contains the phone numbers, email addresses, and any Web addresses that pertain to that person. Note that is possible to assign a schedule to the telephone numbers to ensure that phone numbers are called only when they are available.

	Contact Edit - Miriam Estrada								
	PROFILE	CONTA	ACT PORTS	USER D	NAME & ADDRESS	WEB MEMBERSHIP	U	SER DEFINED FIELDS	
1	1 - Burglary System	9							
>	1 - Development/Training/Sales	9							
Y	2 - Support	9							
Y	3 - Executive Office / Training Room	9							
>	4 - Added by Signal Handler	9							
						CA	ANCEL PREVIOUS	NEXT	DONE

The User ID waypoint allows the configuration of the User number configured within the panel for that person for each area, if different.

,			Contact Edit	- Miriam Estrada					
		•			-			•	
	Contact Type	Neme		Tite	Suffe				
	Keyholder Job Title	<ul> <li>Miriam Estrad</li> </ul>	a	Birthday 09/25/1969	•			•	Suppress
UPLOAD	Street 1								
CLEAR									
	Street 2								
	City								
	State (United States of America)			Tip Code				7	*
Country									
United States of Amer	rica								*
Time Zone	T								
GM1-07:00 + Mountain	n Time (US & Canada)								•
Language English (United States	0								
	-								
						CANCEL	PREVIOUS	NEXT	DONE

The Name & Address waypoint allows you to enter further detail about the keyholder, including their address, to upload a mugshot of the person, their birthdate, language, and time zone. The mugshot can come in handy when you have video at the location. Time zone is also useful when considering when their phone numbers are, and are not, available. The Web Membership waypoint is where you would assign your customer's their own BoldNet Neo login, if you are going to provide them access. This launches a new dialog that steps through the configuration of their Web user. *Please note that the person must exist, and be saved to the database, before you can add the Web Membership*.

	Contact Left - Miniam Extrado											
Username	PROFILE	E-mail	Contract Points	Locked Out	Last Locked Out Date	Laser A	Last Login Date	Last Password		Com	uan arrenteration	
					Contact Edit -	Miriam Estrada			CANCEL	PREVIOUS	NEIT	DONE
	PROFILE		CONTACT POINTS		USER ID	NAME &	ALONESS	WES MEMBERSHIP		l	USER COTINED FIELDS	
Key #						Assigned				CANCEL	PREVIOUS	DONE

The User Defined waypoint, may, or may not, contain data for you to include about your Contact person.

## **Call List Form**

The Call List form contains lists of people to call. These should only be created after the Contact List contains people, as the list is populated from the Contact list.

	Main Lists AH - After Hours RESP - Responsible Par	RESP - Responsible Parties Rutates Contacts		
Г	Sub Lists	٩.		
L		Name	Must Contact	Does Not Rotate
l		Afred Lyona	Must Contact	Does Not Rotate
		Name Affrad Lyons Mirsen Estrada	Must Contact	Does Not Rotate
		Name Alfred Lyons Minae Estrade Judéh Herra	Must Contact	Does Hot Rotate
		Name Albed Lyons Minam Entrada Judith Hanna Tensara North	Must Contact	Does Not Rotate
		Name Afhed Lyons Minem Entrade Juddh Hente Termes North Ben Base	Must Contact	Does Hot Rotate

Main Lists may contain people, authorities, agencies, anyone. Sublists may only contain people and are often used when rotating people on a weekly or monthly basis.

## **General Schedules Form**

General Schedules may be of interest to you because, different from Open/Close schedules, they allow you to enable, and disable, items based on the days of the week and times of the day. There are several types of general schedules. We recently mentioned that there is a schedule you can tie to telephone numbers; that is called Keyholder Availability. There is also Call List Availability that allows you to use different Call lists based on a schedule. These are very powerful when your rotating call lists do not rotate on an even schedule. There is also a General Schedule used for Programming that allows you to ensure an event is, or is not, an alarm based on the schedule. And, recently, we just released the ability to use General Schedules in our Action pattern logic.

## **Open/Close Schedules Form**

- Standard schedu	Description 5	Standard schedule		Show QC Sphedule For 00/04/2017		
	Window Code					06:00 May Open/Clos 22:00 Mast Close
		PERMANENT	ALTERNATE	HOLIDAYS	TEMPORARY	Tuesday - 09/05/2017
	Duy	Time	Action			05:00 May Open/Close 22:00 Must Close
	Man	06:00	May Open:	Close		Wednesday - 09/06/201
	Mon	22:00	Must Close			00:00 May Open/Close
	Tue	06:00	May Open	Close		22:00 Must Close
	Tue	22:00	Must Close			Thursday - 09/07/2017
	Wed	06:00	May Open	Close		06:00 May Open/Close
	Wed	22:00	Must Close			22:00 Must Close
	Thu	06:00	May Open:	Close		Friday - 09/08/2017
	Thu	22:00	Must Close			22:00 May Open Close
	Fri	06:00	May Open:	Close		Saturday - 09/09/2017
	Fri	22:00	Must Close			00:00 May Open/Close
	Sat	06:00	May Open:	Close		22:00 Must Close
	Sat	22:00	Must Close			Sunday - 09/10/2017
	Sun	06:00	May Open	Close		00:00 May Open/Close
	5.0	22:00	Must Close			22:00 Murt Close

Open/Close Schedules in BoldNet Neo are very easy to read and are color coded. Permanent schedules, the schedule that is used when nothing is overriding it, is green. Alternate schedules, which is a temporary schedule that is greater than one day (such as holiday hours or a summer schedule), are yellow. Holiday schedules which are generally configured globally, are blue. And, Temporary schedules, one day overrides, are red.

and in	-	Los Recolution
78/11/2017	1642.34	Log Description WBW, Dustroad Desard for View
06/33/2017	161928	50NAL (Manual), Technican Deckin (*TO) Mantenavice Distance Conversit 5 1 & 1 RL SUB TKID 300 Key *TO
	161929	NOTIFY Dealer - Safe & Sound Security of E-Mol Indexiduaritanchoacheruity comi - Read: Enor
	1619.29	MESSADE -Herks Environed is your requested. Have a nice Day
06/31/2517	16.19.28	NANTDRANCE (ISBE #9- Status, Resolved - Cause User entered - Sore
06/31/2017	1619.04	WEW - Customer Opened Bar View
06/30/2017	22.00.01	90h4L-Late To Close (*LC) 5 1 A 2 Key *LC 0A 2
06/30/2017	14:22:32	WEW - Customer Opened Nar View
06/30/2017	14:23:31	WEW - Customer Opened fair View
08/30/2017	14:20.01	WEW - Customer Opened Rar View
08/30/2017	14,22.31	SAVE - Customer Details Saved
08/30/2017	14:23:31	WEW - Customer Opened Ray View
08/30/2017	14:22:31	WEW - Customer Opened for View
08/30/2017	14.19.41	WEW - Customer Opened Rai View
08/30/2017	1419.40	WEW - Customer Opened for View
08/30/2017	14.19.40	WEW - Customer Operand for View
08/30/2017	14.19.40	SAVE - Customer Details Seved - added back image
08/30/2017	14.19.40	VEEN - Cyatomer Opened Kar Werk
06/30/2017	14.19.40	VEW - Customer Opened for View
08/30/2017	1438.39	VEW - Cystomer Opened Ro Wew
08/30/2017	14.18.02	WEW - Customer Opened for View
08/30/2017	1418.32	VIEW - Customer Opened for View
08/30/2017	1418.32	SAVE - Customer Details Seven - image files agen
08/30/2017	1418.32	WEX - Customer Opened for Vew
06/30/2017	141832	VRW - Customer Opened for View
08/30/2017	141650	VEW - Customer Openad for View
06/30/2017	14:16:49	VEW - Customer Opened for View
\$8/30/2017	1415-45	VEW - Customer Opened for View

The upper right-hand corner of the main schedule form has a drop down that allows you to seed the week's schedule for any selected date.

The overall schedule shows the current day highlighted and indented and the color coding carries over to show any overrides.

## **Activity Log Form**

The customer activity log is a full-page view of the same activity log you can view on the Details form. This has the same functionality and features.

### **Permits Form**

The Permits Form contains any permits configured for the customer and displays the details for the same.

Permits					
Q,					
Permit Number	Authority/Permit Types	Status	Status Date	Expiration Date	False Alarms
1234	Police - General	Unknown			8
					Rows: 10 ¥ 1-1 of 1
Permit Details					
0	1004				
Permit No.	1234				
Authority/Permit Types					
Status	Unknown				
Status Data					
Status Date					
Expiration Date					
Ealas Alarma					

## **Comments Form**

The Comments form has three types. Temporary, Standing, and Special Instructions.

Temporary Comments are just that. Temporary. These comments should have an expiration date in the near future. If the comment is "until further notice" that is a Standing Comment.

Standing Comments are facts about the location.

Special Instructions are configured, and only available for use, by the Monitoring Center.

Temporary	Standing Comment		1
Standard	Description Large Camp.	8	
Description	Show On Open	Auto Chert: Operator Mart See Alarm	
Large Comput	Alarm On Test Pre-Cancel Entry Maintenance	Paget Contacts     Temporary Schedulee     Temporary Schedulee	
	Comment		
	This site is part of a large The West sortion of the of	campun. Koa lu located in the unnue section of the campus	
	The Executive offices are	found in the upper section east portion of the campus. The doors face West.	
	The Support facilities are	In the lower portion of the campus and the doors face East.	
			1.000
Special			

## **User Defined Fields Form**

When available, User Defined fields contain information not found in other locations on the Customer record.

#### **Plans Form**

The Plans form houses images of the property and can contain zones, areas, devices, and much more.



These images not only assist you in knowing where the points exist within the property, they also assist the alarm handling operators when handling the alarms. When they receive an alarm, they can view the plans and see exactly what point is in alarm, which, in turn, helps them better direct those responding to the site.

Devices can also have their fields of view configured and displayed on the plans.



It is also possible to directly access the reference images of the devices by clicking the blue dot to the right of the camera.

### **Maintenance Issues form**

The Maintenance Issues form is a key location where the monitoring center can communicate customer issues and requests to you. When there is a Maintenance Issue for a customer, its details are shown on the Maintenance Issues form. This also shows in the Customer Status when the item is currently unresolved. Any unresolved Maintenance Issues also list on the main Statistics page on your Dashboard.

## **Reports Form**

Any scheduled reports for a single customer show on the Customer's Reports form. When allowed, it is possible to add a scheduled report from this form.

System Reports	Scheduled Reports					
Activity	Title	Last Run	Next Run	Interval	User	
Maintenance	•		No Results			
Master File	•					
System						
	1					
	1					
	1					
	1					
	1					
	1					
	1					
	1					
						_
Report History						
۹						
Description	Status	Report Submitted	Report Started	Report Finished	Error Message	
			No Results			

#### **Reverse Send**

Reverse Send is for accessing equipment from within the system to the equipment at the location. When available, this information contains the Transmitter and the available commands.



# **Placing a Customer Record on Test**

There are a few ways to place a customer record on test. The fastest way to do so is to load the customer record and, on the <u>right-hand frame</u> expand the Add On Test section, set the Hours and Minutes, enter a reason then press Start.

This places the entire customer account On Test for the period of time selected.

		Add On Test	
		Hours	
	/	Minutes	
System On Test		Millites	
Current On Test		Reason Testing the new system	
09/05/2017 09:42 <b>To</b> 09/05/2017 10:42 Testing the new system Entire Customer	Ê	START ADVANCED	-

Clicking the Advanced link takes you to the advanced On Test where you can specify the individual systems, areas, and zones, as well as the event categories and codes to place On Test.

Resson Individual Event (	Category Valid From					
Permanent	Valid From					
Permanent	Valid From					
Permanent	Valid From					
	09/05/2017	• 09:52	Valid 1 09/0	10 05/2017	<ul> <li>11:52</li> </ul>	
System		=	Q			
*			Even	t Categorie	es	
1X				Category	Description	
Area			0	ACCESS	Access Alarm	5
				BURG	Burglary	
Zone			0	EMERG	Emergency	
Event Category		=	0	ENV	Environmental	Alarms
		=	0	GEN	General Alarm	5
Event Codes				HOLDUP	Holdup / Pers	onal Attack
				MEDICAL	Medical Alarm	15
				OPCL	Open / Close	
				SERVICE	Service Signal	5
			Rov	ws: 10 🔻	1-10 of 11	< > »

To remove an On Test, simply click the Trash can icon and verify that you wish to remove the On Test and enter a reason for the removal of the On Test.

			Reaso	n
Warning			Reason	
You are about to delete On Test: 09/05/2017 9:51 - 09/05/2017 11:51, "Individ	Done Testing			
	CANCEL	ок	CANCEL	ок

# **Reviewing the Customer Activity Log**

The Customer Activity Log contains all the history of the changes made, the alarms and signals that are processed through it and more.

Date	Time	Log Description	
09/05/2017	09.55:20	SIGNAL - On Test Removed (*OTR) On Test Removed (O: 1, Whole System ()) Key: *OTR	
09/05/2017	09.55.18	ON TEST [Temporary] - STOPPED ID: 1 - 09-42 to 10-42, 5 Sept - Whole Customer	
09/05/2017	09:55:18	ON TEST [Temporary] - DELETED ID: 1 - 09-42 to 10-42, 5 Sept - Whole Customer	
09/05/2017	09:55:13	SIGNAL - On Test Removed (*OTR) On Test Removed \$D.2. Selected Components (Done Testing) Key: *OTR	
09/05/2017	09:55:11	ON TEST [Temporary] - STOPPED ID: 2 - 09:51 to 11:51, 5 Sept - Selected: Reason: "Done Testing"	
09/05/2017	09:55:11	ON TEST [Temporary] - DELETED ID: 2 - 09:51 to 11:51, 5 Sept - Selected Cat: BURG, FIRE, MEDICAL Reason: Done Testing	
09/05/2017	09:51:51	SIGNAL - On Test Started (*015) On Test Started (ID: 2, Selected Components (Individual Event Category)) Key: *015	
09/05/2017	09:51:49	ON TEST [Temporey] - STARTED ID: 2 - 01 S1 to 11 S1, 5 Sept - Selected Reason Individual Event Category	
09/05/2017	09.51.49	ON TEST [Temporary] - ENTERED ID: 2 - 09:51 to 11:51, 5 Sept - Selected: Cat. BURG, FIRE, MEDICAL Reason: Individual Event Category	
09/05/2017	09.42.57	SIGNAL - On Test Started (*OTS) On Test Started (D: 1, Whole System (Testing the new system)) Key, *OTS	
09/05/2017	09.42.55	ON TEST [Temporary] - STARTED ID: 1 - 09:42 to 10:42, 5 Sept - Whole Customer Reason: Testing the new system	
09/05/2017	09:42:55	ON TEST [Temporary] - ENTERED ID: 1 - 09-42 to 10-42. \$ Sept - Whole Customer Reason: Testing the new system	
09/05/2017	09:32:19	VEW - Customer Opened for View	
09/05/2017	07.53.43	VIEW - Customer Optimed for View	
09/04/2017	22:00:01	SIGNAL - Late To-Close (*LC) S 1 & 2 Key: *LC OA 2	
09/04/2017	21:53:12	VIEW - Customer Opened for View	
09/04/2017	21.52.55	VIEW - Cuatomer Opened for View	
09/04/2017	21 52 55	VEW- Customer Opened for View	

The Activity log displays the most recent activity at the top. Think of it like your email. You find your most recent email at the top of your email box. When there are details tied to activity, such as an alarm. Those lines read from the top down. Also, like your email, it is easier to read your email from left to right and top to bottom.

Date	Time	Log Description
	11:23:57	COMMENT - ex
	1123-58	DEFERRED - Interior Burg (BA2)
08/30/2017	10.47.31	ALARM (Manual) - Fire Alarm (FA) West Door S: 1 A 1 Z: 1 RL: SUR TX4D: 1001 Key: FA DA 1 0Z: 1 Con: C - Cust-Cancel - Closed 10:53 False Res: EQ
	10:47:33	DEFERRED - Fire Alarm (FA)
	10.47.46	ALLOCATED - Fire Alarm (FA) - Manual
	10.47.46	VIEWED - Fire Alarm (FA) - Response [13 Secs]
	10:50:17	CONTACT Customer - Bold Technologies Ltd. at Site [[719] 593-2829] - Result: Contacted
	10.50.54	RESPONSE - Slow Fire (FA) - Viewed [13 Secol View to Action [02:31] Actioned [02:44]
	10.51.09	PASSWORD - Contact Password Verified (Jam Taylor)
	10:53:10	CUST CANCEL - Fire Alarm (FA)
	10:53:10	COMMENT - Testing fire system
	10.53:11	CLOSE - Five Alarmi (FA) - Res: EQ
	10.53 11	RESOLUTION - Fire Alarm (FA) - Res: EQ - Failse Alarm
08/30/2017	10:38:52	REVERSE COMMAND - Playback command(a) - Completed
08/30/2017	10.38.52	REVERSE COMMAND - Camera Command(s) - Completed
08/30/2017	10:38:04	VIEW - Customer Opened for View

It is possible to filter the alarm queue in two ways:

1. By typing a specific word into the search field at the top of the log.

KQI	Date	Time	Log Description	
	09/05/2017	09.55.11	ON TEST [Temporary] - DELETED ID: 2 - 09 51 to 11:51, 5 Sept - Selected: Cat: BURG, FIRE, MEDICAL Reason: Done Testing	
	09/05/2017	09:51:49	ON TEST [Temporary] - ENTERED ID: 2 - 09 51 to 11 51, 5 Sept - Selected: Cat: BURG, FIRE, MEDICAL Reason: Individual Event Category	
	08/30/2017	10.47.38	ALARM (Manual) - Interior Burg (BA2) West Door' S 1 A: 1 Z: 1 RL: SUR TX-ID: 1001 Key BA2 CA: 1 CZ: 1	
		10.53.30	ALLOCATED - Interior Burg (BA2) - Manual	
		10.53.30	VIEWED - Interior Burg (BA2) - Response (05.52)	
		10.53.32	SHOW Plana	
		11:23:58	DEFERRED - Interior Burg (BA2)	
	08/30/2017	10.01.37	ALARM (Manual) - Interior Burg (BA2) West Door'S 1 A 12 1 RL SUR TX-ID 1001 Key BA2 GA 1 GZ 1 - Closed 10/23 Res NF	
		10.23.22	ALLOCATED - Interior Burg (BA2) - Manual	
		10.23.22	VEWED - Interior Burg (BA2) - Response [21:45]	

2. By clicking the filter (funnel) icon and conducting an Advanced search.

GENERAL	L SIGNAL AL	ARM FILTERS						
Date From		] Reverse		Log Rec	ord Type			
08/05/2017	18:00			Select All	Select None			
Date To	_	Time Panne		Q				
09/05/2017	17:59	J Time Nange			Description			
				5	Signal			
Time Zone			Display	5	Alarm			
GMT-07:00 -	Mountain Time (US	5 & Ca 🔻	Standard		Handled			
Log Record	i Type 🔳			0	Astico			
				0	Action			
Event Code	es 🔳				Alarm Response			
					Reverse Command			
Associated	Objects 🔳				Alarm Confirmation			
					Allocated			
Event Cateo	gories 🔳			0	Ignored Signal			
				0	Caller ID			
						Rows: 10 🔻	1-10 of 37	< > >
						Rows: 10 •	1-10 of 37 CANCEL	< > »
ustomer Activity	y Log Standard •	соммент				Rows: 10 •	1-10 of 37 CANCEL	SEARCH
ustomer Activity	yLog Standard •	соимент				Rows: 10 •	1-10 of 37 CANCEL	SEARCH
Sustomer Activity	yLog Standard • Date	COMMENT	Log Description			Rows: 10 •	1-10 of 37 CANCEL	< > > SEARCH C ▼
ustomer Activity	y Log Standard • Date 09r05/2017	COMMENT Time 09:55:20	Log Description SIGNAL - On Test Removed (*OTR) On 1	Test Removed (IC: 1, Whole Sy	stern (j) Key-"OTR	Rows: 10	CANCEL	SEARCH
ustomer Activity	y Log Standard • Date 04/05/2017 04/05/2017	COMMENT Time 09:55:20 09:55:13	Log Description SIGNAL-On Test Removed (*OTR) On SIGNAL-On Test Removed (*OTR) On T	Fest Removed JD. 1, Whole Sy Fest Removed JD. 2, Selected	stem (j) Key-"OTR Components (Done Testing) Key-"OTR	Rows: 10	CANCEL	SEARCH
Dustomer Activity D	y Log Standard • Date 04/05/2017 09/05/2017 09/05/2017 09/05/2017	COMMENT Time 095520 095513 095131 095151	Log Description SIGNAL - On Test Removed (*OTR) On SIGNAL - On Test Removed (*OTR) On SIGNAL - On Test Removed (*OTR) On Test SIGNAL - On Test Removed (*OTR) On Test	Fest Removed JD: 1, Whole Sy Fest Removed JD: 2, Selected at Dates JD: 2, Selected Cor-	atem (jį Kay-10TR Čongonenta (Door Testingiji Kay-10TR ponenta (Door Testingiji Kay-10TR - Žianio da kondika (Teang) (Kay-10TS	Rows: 10 •	CANCEL	SEARCH
Sustomer Activity	Y Log Standard • Date 04/05/2017 04/05/2017 04/05/2017 04/05/2017	COMMENT Time 095520 095513 095151 095151 095151	Log Description SIGNAL - On Test Removed (*OTR) On SIGNAL - On Test Removed (*OTR) On SIGNAL - On Test Removed (*OTR) On Te SIGNAL - On Test Removed (*OTR) On Te SIGNAL - On Test Removed (*OTR) On Te	Fest Removed 30: 1, Whole Sy Fest Removed 30: 2, Selected at Started 30: 2, Selected Con at Started 30: 2, Selected Con at Started 30: 2, Whole System	stem ()] Key *01R Components (Door Testing) Key *01R gonents (Individual Event Category)] Key *01S «(Testing the new system)] Key *01S	Rows: 10	CANCEL	SEARCH
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Notice the funnel is now highlighted in red and there is a "not" symbol now that would enable you to remove the filter.

## **Creating a New Customer**

Use the New Customer Wizard to create a New Customer within BoldNet Neo. When you click the New Customer Wizard you are prompted to either create a new customer or to create a new customer based on an Existing Customer. It is a whole lot easier and faster to create a new customer based on an existing customer as long as you are diligent in changing the key information to the new customer's data. Here we step through the creation of a brand-new customer.

Initial Setu	P	
Create new Customer     O Copy from Existing Custo	mer	
Customer ID		
This field is required.		
Country		
United States of America		•
Time Zone		-
GMI-07:00 - Mountain Time (US & Canada)		•
Language English (United States)		•
Dealer SNS - Safe & Sound Security		•
Monitoring Status		
Active		•
	CANCEL	NEXT

Your Monitoring Company will provide you with your Customer ID standards. <u>Please follow those exactly to save the</u> <u>monitoring center time making corrections</u>. The country language and time zone defaults to the local settings of the Monitoring center. If this is different than your time zone, please make the appropriate change. Your dealer information automatically loads, as does your default monitoring status. If you would like to change this to Inactive to ensure no one dispatches on your test alarms, please do so here. When all your information is correct. Click Next.

### **Name & Address Waypoint**

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Zp Code     City       The field regard.     The field regard.       State for regard.     The field regard. </td <td></td>	
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Coss Street         OMT0700 - Moutan Time (US & Canada)           Subdivision         Linguist           Subdivision         English (United States)           Correr         Correr	
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Subdivision English (United Bases)	
Subdivision English (United States)	
Corry	•
United States of America *	
Ansuring Company	
- Accounting Number	Q
CANCEL NEXT FINI	н

You will notice that there are waypoints across the top of this page like there were in the Contact List person creation dialog mentioned earlier. Each page enables as you complete the page before it. Required fields highlight in red.

The first page is for the Name and Address. This also contains the Customer type, Account Type, and Relationship type.

Account Types are: Normal, Main, Sub, and System

Normal is an account that, essentially, stands alone by itself.

Main and Sub have a relationship. Think of a strip mall where the fire panel covers more than a single site. One is the Main account, where the fire panel resides, and the sub accounts are the individual businesses with fire contacts. Or a large building with a single alarm system and the different businesses are sub-divided for alarm handling.

System accounts are used by the Monitoring Center.

Related types are: Normal, Master, and Related to Master.

Normal is also just that, it has no relationships that need to be tracked to others.

Master and Related to Master means they have a relationship to other accounts, generally, in proximity to one another, such as an apartment complex or a campus.

Notice that the address section has the zip code listed first. This is to speed the address entry. When the zip code exists in the database and there is one and only one city and state tied to it the focus jumps down to the Street 1 field and lets you start typing in the address.

Once all the data is in place you are ready to move on to the next waypoint and can start entering the site-specific contact points, by clicking Next.

## **Contact Points Waypoint**

Customer	Wizard - New Business							
	NAME & ADDREDS	CONTACT POINTS	MONETORING DCEALS	EVETEMS	CONTACTS	OALLUSTE	USCROSTING R	0.06
Phone Nur	nbers							
Туре		Phone Number	Extension	Script		Schedule	Private	
Site		<ul> <li>(719) 555-2828</li> </ul>		Script		<ul> <li>No Schedule</li> </ul>	• □	×
ADD							_	
Email Add	ress							
ADD								
Web								
ADD								

The Contact Points waypoint is for the addition of site-specific contact points. This is not for all the people at the site. Chances are, this may be only one or two phone numbers and an email address. Once all details are in place, click Next.

## **Monitoring Details Waypoint**

Customer Wizard - Ne	w Business					
NAME & ACOR	ESS CONTACT POINTS	MONITORING DETALS	EVETIME	CONTACTS	CALLUSTS	USER DEFINED FIELDS
Passwords						
Dureos	Paseword	Description				
	SARGENT	All Okay				×
2	CLEARING	Stress Code				×
_						
ADD						
Codes			Fill			
Group Code			₹ <sup>Jea</sup> Fit			
			Always Add/Update Are	8		
Class Code			y Zone Rill			
			Ignore			· · ·
Monitoring Group			Time Format			
0 - Monitoring Group 0			Default			
Options						
Ignore Aborts						Show All hide All
Auto Cancel Alarm This enables some	ns on Restore e signal processing and programming features to allow the a	auto-cancelling of alarm events if parameters are met.				· · · ·
Generate Unexpec	ted Restores					
venty Panel User I	number					

The Monitoring Details waypoint contains the site-specific passwords, including duress codes, Group Codes and Class Codes, if you use them, and some additional options you can expand the options to read what they mean by clicking the show all or expanding the three dots (ellipses). When you have all items set the way you need, click Next.

### **Systems Waypoint**

The Systems waypoint has several elements. First you can add a system, then the transmitter, then the areas and zones, and finally the programming. To ease this process, it is possible to copy and paste some of this information into the wizard as you are entering your data.

#### Add your System

In this example we are adding an Event Monitoring system. Event Monitoring is a traditional alarm monitoring system that sends events into the Monitoring center. Here you enter a description we are monitoring it for Alarms, and we can, if available, select the Control Panel type, then click Next.

### Add the Transmitters to the System

Add System 1 - Bruter Agen Destron								
OVETEM	Te	AKEAS & ZONKE	FROGRAMMING					
тх								
TX No 1		Caller Id 1						
Description 1200		Caller Id 2						
Transmitter Type DFLT - Default Transmitter Type		Remote Address						
Receiver Line Prefix		_						
AA - AA		•						
TX D 1200		,						
TX Protocol Type None								
a way ng								
TX Dates								
Path Enabled			•					
Connect Date			-					
Termination Date			-					
Interval								
Test Unit			•					

Give the transmitter a description. Select the Transmitter Type. Select the Available Transmitter Receiver Line Prefix, Click the Next Transmitter ID arrow to get the next available transmitter ID in your range, select the appropriate options, and add any appropriate notes, then click Done. Repeat for all transmitters on this system, then click Next.

TX Options  Concernite Restore Overdues  A my Activity Satisfies Test  This allows are signal, open close, test, trouble, alarm, or other signaling, to satisfy the test timer. This is to be avoided on a Fire aytem as most requirements atpulate that test time is only satisfied by a test signal.  Extended Signaling Backup TX Do Not Use Dealer Programming Notes  Parel Location: Osrage Closet Mic ADDRESS: 502A11AD;6CE2	TX Type Details  Audio Capable  Create Call Session (No Listen-In)  Drop Listen-Ini fron alarm Video Capable Monitoree Transmission Path Generate Late to Test only when Closed Encrypted Add-On Module		N AN 1
Panel Location: Garage Closet MAC ADDRESS: <u>50:2A:11:ADGCE2</u> Customer Received PN: 2514 Customer Trained by: JK		CANCEL	DONE

#### **Add Areas and Zones**

If you have this data in the correct order in a spreadsheet or text file, it is possible to copy and paste this information into the Areas and Zones. Simply click the hands icon and paste the information into the appropriate space. Areas must be in Area and Description order. Please note that area descriptions cannot exceed 50 characters in length. Zones must be in Area, Zone and Description order. Also, the description field cannot exceed 50 characters in length. Any failures will stop importing at the failure point.

When copy/pasting Format 1: Area ID	, Areas can accept either two or the Description	ee tab-delimited inpu	its per line.	1	
Format 2: Area ID	Description U/C Schedule ID				
2 Warehouse					
3 Shed					
4 Water Meter box				L	
c 0					

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rea		Description		Schedule				
		Main Building		No Schedule Selected		٠	<sup>10</sup>	×
		Warehouse		No Schedule Selected		•	0	×
		Shed		No Schedule Selected		•	0	×
		Water Meter box		No Schedule Selected		•	6	×
		Perimeter fence		No Schedule Selected			n	×
ADD								
ADD								
ADD	zone	Description	Signal		Expected Signals			
ADD ones 😎 ea - Main Build	Zone • 1	Description Front Door	Signal Signal		Expected Signals		0	×
ADD nes 😎 ea • Main Build. • Main Build.	Zone 1	Description Front Door Entry PIR	Signal Signal Signal	•	Expected Signals 0		0	×
ADD nes 👁 Nain Build Main Build	Zone 1 2 3	Description From Dor Entry PR 1st Floor SW Window Contact	Signal Signal Signal Signal	*	Expected Signals 0		0	× × ×
ADD nes Main Build. Main Build. Main Build.	Zone 1 2 3 4	Description Front Door Entry PIR Tet Floor SW Window Contact Tet Floor SE Window Contact	Signal Signal Signal Signal Signal		Espected Signals 0 0 0		0 0 0	* * *
ADD	Zone 2 1 2 2 3 3 4 5	Description Front Door Entry PIR 1st Floor SW Window Contact 1st Floor SW Window Contact 1st Floor SW Window Contact 1st Floor SW Window Glassbreak	Signal Signal Signal Signal Signal Signal	• • • •	Espected Signals 0 0 0 0		0 0 0	× × × × ×
ADD nes Main Build. Main Build. Main Build. Main Build. Main Build.	Zone 1 2 2 3 4 5 6	Description Front Door Estry PIR 1st Floor SW Window Contact 1st Floor SE Window Contact 1st Floor SE Window Contact 1st Floor SW Window Glassbreak 1st Floor NE Window Glassbreak	Signal Signal Signal Signal Signal Signal	• • • • •	Expected Signals 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		a a a	× × × ×

Once all areas and zones are in place, click Next.

### Enter Programming, if appropriate

If your panel sends in intelligent signaling such as SIA or Contact ID the Manitou system is smart enough to receive those signals without having to program them in to the customer record. The Programming is only necessary for non-intelligent panels such as 4X2 and some radios, and when we have to change what is happening to an intelligent event.

Here you see there is an input and output section of the programming.

							1-Ba	Add System glar Alarm S	ystem							
							5				ARCHO & 20MES			The second second	9	
•																
input						Output						Special Processing				
тх		Event	Acea	Zone	Sensor	Event	Description	Area	Zone	Sensor	Point ID	Commands		Help		
* - Al Transmitt	٠	*A	•	3*	•	84	Burglar Alarm		3+				-			*
												1				
ADD																
														CANCEL	PREVIOUS	DONE

Input is what is coming in from the panel. A non-intelligent alarm is presented into the alarm system as an Activation, which is a \*A. Then we need to know what zone, or zones, to translate. In this example we are saving ourselves some time and stating that all 30 zones.

The output is what we want to present to the alarm operators. In this instance we want the alarm to be a burglar alarm. So we selected BA for the event code. On the output side we have equal signs that means we want what we got in on the input side on the output side. We put 3= on the zone because we want to match up to our zone list for our 30 zones.

The Commands section is for more advanced processing of the signals. Your Monitoring Company can arrange for some more advanced training on these at a later date. The Help would be for some additional explicit instructions that would be added to every alarm, every time, if necessary.

Repeat programming for any translations, as required, then click Done.

Add as many systems as needed then click Next.

## **Contacts Waypoint**

These are the people and entities that have access to the customer site. Be sure to select the appropriate authorities. It is possible to copy and paste the general contact details to speed up the data entry process in the wizard.

Copy/	Paste (Contact Grid)
When copying/pasting into the Contact Grid, there must The grid supports pasting up to as many contact points For example, if the grid currently displays only a Site Co But, if the grid displays Site, Home, and Fax, then you ca "Type" is numeric. 0 = Contact; 1 = Keyholder; 2 = Techn Example 1: Type Name Contact Point	t be at least three tab-delimited values passed in. as the grid currently displays. ntact Point, then you may paste only one contact point. See Example 1. an paste three contact points. See Example 2. ician; 3 = Agent
Example 2: Type Name Contact Point Contact Po	pint Contact Point
1 Sally Johnson 7195284949 7195858225	
0 Mary Smith 7195284848	
1 Jerry Johnson 7195824879	
2 Doc King 7195286464 7195458888	
1 John Martin 7195285454	
	CANCEL OK

The Contact detail entry process is the same as covered previously in the Customer overview. When all contacts, including Authorities, are in place, click Next.

## **Call Lists Waypoint**

			Add Call List				
Call List RESP	Description Responsible Parties				Call List Type Main List		÷
Show Suppressed Contacts Rotates Availability							
			<ul> <li>Defer To</li> </ul>				*
٩		Q		Q			
Available Contacts		Sally Johnson		List Contacts			
Name	Contact Type		Contact Points	Name			
Doc King	Technician	Home	(719) 528-4949	Doc King (Home)			
Safe & Sound Security	Dealer	Mobile	(719) 585-8225	Sally Johnson			
Sally Johnson	Keyholder			Jerry Johnson			
Mary Smith	Contact				Rows: 10 🔻 1-3 of 3		
Jerry Johnson	Keyholder			Must Contact	No Rotation		
	Keyholder						
John Martin	Keyholder						
Colorado Springs Police Department	Police						
Colorado Springs Fire Department	Fire						
American Medical Response Colorado Springs	Medical						
Ros	ws: 10 ▼ 1-10 of 11 < > >						
					CAN	ICEL DO	ONE

Creating a Call List in the Wizard behaves much the same as it does inside the customer, you have the two types: Main and Sub, and the list of available Contacts from the Contact list. Pick them and move them into place by selecting the individuals or their Contact Points. When all the contacts are in the call list in the order desired, click Done. Repeat for all necessary Call Lists, then click Next.

## **User Defined Waypoint**

When necessary, complete any User Defined fields, then click Finish. This commits the new customer to the database. The customer has all the data necessary to be able to place the account On Test and send in and receive signals.

## **Making Changes to Customers**

Changes are made to customers by clicking the pencil icon on the appropriate cards.

#### To change a telephone number on a contact person

- Navigate to the Contact List and locate the person on the list.
- Click the pencil icon on the details card.
- Select the Contacts Point waypoint.
- Make the appropriate change.
- Click Done.
- Click the Save icon.
- Enter the reason for the change.

#### To adjust the order of who is called on the Call List

- Navigate to the Call List on the Customer Record.
- Click the Call list to change.
- Click the pencil to edit the Call List.
- Click the Person or contact point and drag or click the up/down arrow to move them to their appropriate place.
- After making all appropriate changes, click Done.

		Edit Call List	
Cell List RESP	Description Responsible Parties	ci M	i List 👻
Show Suppressed Contacts	Rotates		
Availability		▼ DeferTo	
Q		Q	
Available Contacts		List Contacts	
Name	Contact Type	Name	
Alfred Lyons	Keyholder	Alfred Lyons	
Miriam Estrada	Keyholder	Tamara North	
Elias Bailey	Keyholder	Miriam Estrada	
Mike Bailey	Keyholder	Judith Hamia	× * *
Judith Harris	Keyholder	Ben Bass	
Tamara North	Keyholder	R	lows: 10 ¥ 1-5 of 5
Carie	Keyholder	Must Contact	No Rotation
Jim Taylor	Keyholder		
Christina Walker	Keyholder		
Ben Bass	Keyholder		
	Rows: 10 ▼ 1-10 of 17 < > >		
			CANCEL DONE

- Click the Save icon.
- Enter the reason for the change.

#### To Add a Zone

- Click the Systems section on the navigator then expand the system where you wish to add your zones and select Areas & Zones.
- Click the pencil icon next to the Zones.
- Click Add.
- Enter the Area.
- Enter the Zone.
- Enter the Description.
- If there are expected signals, select a whole number.
- Repeat as needed.
- Click Done.
- Click the Save icon.

### • Enter the reason for the changes.

		Zones Edit				
Area	Zone	Description	Signal	Expected Signals		
1 - Development/Training/Sales	¥ 1	West Door		• 0	6	×
1 - Development/Training/Sales	<b>*</b> 2	Center Door		• 0	õ	×
1 - Development/Training/Sales	<b>w</b> 3	East Door		• 0	0	×
1 - Development/Training/Sales	<b>v</b> 4	Fire Smoke Detector 1		• 0	0	×
1 - Development/Training/Sales	¥ 5	Fire Pull Station 1		• 0	8	×
1 - Development/Training/Sales	<b>v</b> 6	Fire Smoke Detector 2	Never Received	• 0	6	×
1 - Development/Training/Sales	<b>v</b> 7	Fire Pull Station 2	Never Received	• 0	0	×
2 - Support	¥ 1	Entry Door	Never Received	• 0	0	×
3 - Executive Office / Training R	¥ 1	Entry Door		• 0	0	×
DDA						
					CANCEL	DONE

Please note that once you enter a zone number that number cannot be changed. You can move and copy zones from one system to another but if it is entered incorrectly, it must be removed and added again. An asterisk (\*) can be used if the zone is meant to be represented in all areas or when the signal doesn't carry an area.

## Add a Comment to the Activity Log

There are times when you want to document something into the Customer record. BoldNet Neo allows you this ability. You can enter a Comment to the top of the log by simply adding a comment, or to a specific item in the activity log by clicking onto a particular line, such as an alarm, and adding the comment to the selected event. Either way you will need to be on the Customer Activity Log to start the process.

- Load the customer log and select the top line or the event to comment upon by single clicking the far left side of the line so the arrow points to that line.
- Click COMMENT.
- Choose New or Add to Event.
- If New, Enter a Summary (or title).
- Enter the details of your comment.
- Hidden checkbox <u>does not hide</u> the comment from view from you or the Monitoring center. It simply lists it as a System comment that doesn't produce on printed reports. This is still part of the permanent record. Check the hidden box only when absolutely necessary.
- Click Done.

The comment appends to the Activity log.

## Reports

It is possible to run several reports from within BoldNet Neo. To launch the reports menu, click the hamburger icon>Reports>System Reports.

	≡ SAFE SOUN	ND SE	CUR	ITY
H	File	•		Activity
	Tools	•		Alarm Cause Summary
	View	•		Alarm Detail
	Operations Maintenance		urity	Alarm Detail by Alarm N
С	Reports		System Re	eports
	System Repo	orts	Report Qu	eue

The Reports form is broken down into five sections:

- Activity All reports related to the customer activity log.
- Custom Customized reports added to the system.
- Maintenance Reports relating to Account maintenance.
- Master File Reports that list data.
- System Reports that provide data about the systems tied to the customer records.

### **Common Reports Bold Users Run**

- Customer activity
- Daily Signals
- Customer Master File to get a full printout of the customer record.
- Maintenance Issues to get a list of items requiring attention.
- Customer Add/Delete

#### **Run a Report**

To run a report:

- Select the desired in the list.
- Load the customer, or customer range, in the Customer ID or Customer Name field(s).
- Set the date range to include.
- Choose Display Now or Download.

Activity	<b>Customer Activity</b>						
Alarm Cause Summary	This report lists sig	pal/alarm details, open and d	foring active	y and any exception activity. Exception activity could include	eunexpected openings/closings, unexpected restores and the like.		
Alarm Ortal							
Alarm Detail by Alarm Number				*			
Customer Activity	in Cashara Anna						
Darly Signals	Calorie Activity	From		5			
Last Garral Date	Customer ID		Q. #	۹. ۴			
Sand Court In Customer	Customer Name						
Interference Controls	Dealer ID	SNS-Safe & Sound Securi		SNS-Safe & Sound Security			
Contraction of the	Branch ID		0	0.			
	(mage						
	Ciano						
	Zp/Fost						
	User ID						
	User No / Card No						
	Area						
	Date	01/06/2017 * 00:00		09.04/2017 * 23.55			
	D Exclude size	with particular from the		Activity Type:	Dispatcher	t.	
				@ ALMERY			
				O forester article	O Date	a deal	
				O Corry Close activity	O here	isostohed	
				O Check-In/Out activity			

Note: If you have pop-up blockers, you will need to allow them to display reports.