Manitou 2.x Web client

How to create a BoldNet Neo Web User

This guide steps through how to create a Web user from the contact list of a customer record so that they may use BoldNet Neo.

Instructions:

1. Load the Customer Record and navigate to the Contact List.

2. Load, or create, the contact, then ensure they have the following: *(see Image 1 on page 2)*

    1. Password

    2. Web Access ID

    3. Web Profile (This restricts, what the user may see and do in BoldNet Neo)

    4. Access permissions. (These permissions will enable the user's ability to actually edit a customer record or put the account on test, when they enter the account in BoldNet Neo.)

5. On the Web Membership Waypoint, Click Add: *(see Image 2 on page 2)*

    1. Enter a username.

    2. Enter their Full Name.

    3. Enter their email address. This must be the email address they would use as a recovery address and is required to use BoldNet Neo.

    4. Enter and Confirm their password.

    5. Enter a verification question and answer.

    6. When Done the Done option enables, click Done.

7. Click Done.

8. Click the Save Icon, enter any final comments about the creation and click OK.

This creates the BoldNet Neo user. It is always recommended to test the user before notifying the end user of the record being ready. Also, it is good to advise them to change their password upon entry into BoldNet Neo.

Additional Notes:

- BoldNet Neo users may be created on the Customer, Dealer, Global Keyholder, Branch, or Company records. All are created on the Contact list just as described here.
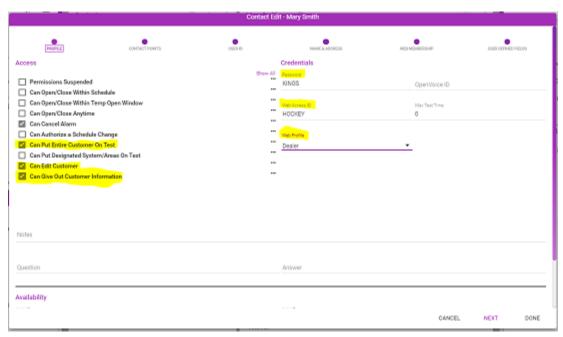
Screenshots of the data entry:

Image 1

Image 2