

How to create a BoldNet NEO Web User

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This article 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)*
 - Password
 - Web Access ID
 - Web Profile (This restricts, what the user may see and do in BoldNet Neo)
 - 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.)
3. On the Web Membership Waypoint, Click Add: *(see Image 2)*
 - Enter a username.
 - Enter their Full Name.
 - Enter their email address. This must be the email address they would use as a recovery address and is required to use BoldNet Neo.
 - Enter and Confirm their password.
 - Enter a verification question and answer.
 - When finished, the Done option is enabled.
4. Click Done.
5. 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:

□

Contact Edit - Mary Smith

PROFILE	CONTACT POINTS	USER ID	NAME & ADDRESS	WEB ACCESS ID	ENROLLMENT DETAILS
Username dealeruser			Full Name Mary Smith		
Email msmith@dealeremailaddress.com			Comment		
Password *****			Confirm Password *****		
Question verification question			<input type="checkbox"/> Locked Out		
Answer 1234567					
Web Access ID HOCKEY					
Password KINGS					

CANCEL DONE