How to create a BoldNet Web User

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

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.)
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 they will use to log into BoldNet.
    - Enter a verification question and answer.
    - When finished, the Done option enables.
4. Click Done.
5. Click the Save Icon, enter any final comments about the creation, and click OK.

This creates the BoldNet 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.

Additional Notes:

- BoldNet 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:

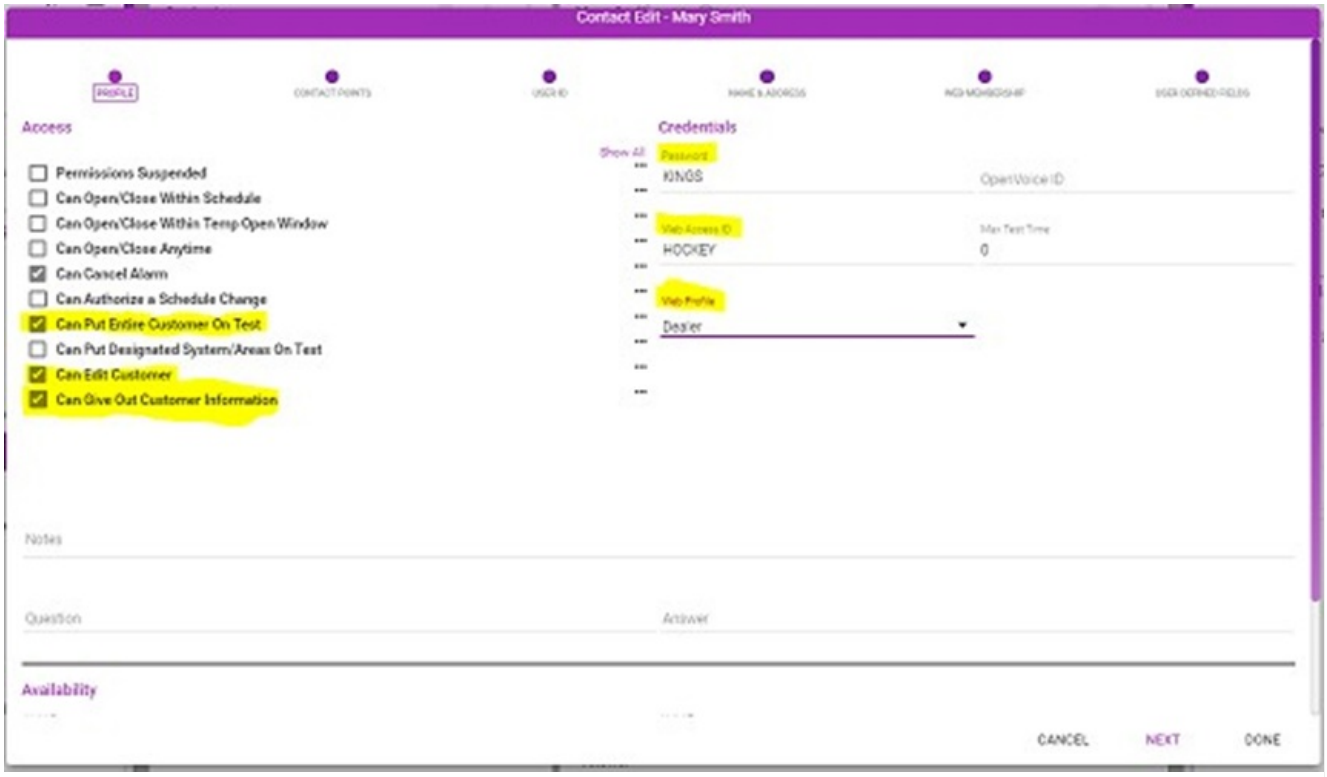
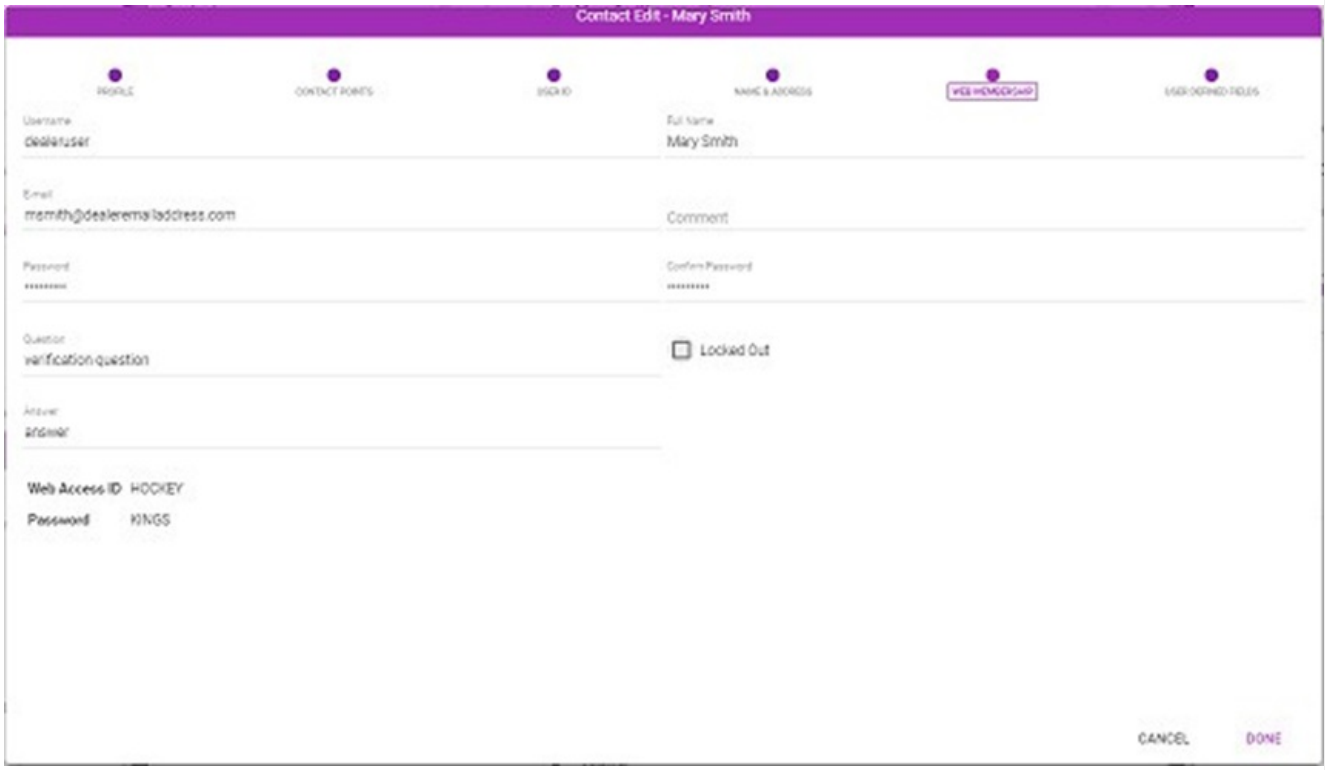

Contact Edit - Mary Smith
PROFILE
Access
Permissions Suspended
Can Open/Close Within Schedule
Can Open/Close Within Temp Open Window
Can Open/Close Anytime
Can Cancel Alarm
Can Authorize a Schedule Change
Can Put Entire Customer On Test
Can Put Designated System/Areas On Test
Can Edit Customer
Can Give Out Customer Information
Credentials
Password
KINGS
OpenVoice ID
Web Access ID
HOCKEY
Max Test Time
0
Web Profile
Dealer
Notes
Question
Answer
Availability
CANCEL
NEXT
DONE

Image 2:


Contact Edit - Mary Smith
PROFILE
WEB MEMBERSHIP
Username
dealeruser
Full Name
Mary Smith
Email
msmith@dealeremailaddress.com
Comment
Password
Confirm Password
Question
verification question
Locked Out
Answer
answer
Web Access ID HOCKEY
Password KINGS
CANCEL
DONE