POWERED BY BOLD

We understand what it takes to be a leading central station. It requires innovation, service, and experience. This is why we have chosen Manitou from Bold Technologies as our alarm automation software.

INNOVATION: Bold Technologies is dedicated to integrating technological breakthroughs and bringing innovative products to market. This gives you a direct competitive advantage.

SERVICE: Bold understands the importance of partnership. They shape their products from monitoring center and dealer feedback, and integrate with industry leaders to help you generate revenue.

EXPERIENCE: Bold has spent over 35 years crafting awarding-winning alarm automation software. The Manitou platform is in use at over 600 small- to enterprise-sized centers worldwide.

We trust them with our business, and you can, too.

11 business advantages we're excited to offer you:

1. Provide more services and increase RMR with integrated technologies like video, access control, GPS, PERS, and more.
2. Offer new monitored services for technologies not integrated in the traditional manner.
3. A collection of mobile apps help you manage activity in the field, offer mobile PERS services, or give customers a monitored DIY option to engage with their home security.
4. A branded web portal and mobile app allow you to access data, place accounts on/off test, make changes, run reports, and provide account access to your customers.
5. Manage your business with standard to custom reporting options.
6. Integrations with industry leaders provide reliable accounting and back-office management solutions.
7. Reduce data entry by setting up multiple transmitters on a single account.
8. Flexible scheduling options allow you to determine who is called on an account based on the day, time, or other factors.
9. Intelligent and detailed action patterns give dispatchers step-by-step instructions to communicate faster, make less mistakes, and deliver better service to your customers.
10. Protect your business with multiple layers of data replication.

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BoldNet Neo is a new way for you to access information about your account online.

You can quickly review and update account information from anywhere! You have direct control of your information and when it is updated.

BoldNet Neo will be replacing our current web access system. We look forward to providing you with the improved functionality.

Please contact us with any questions!

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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Acknowledgments

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Registered Office: 421 Windchime Place, Colorado Springs, CO 80919 USA

Contents

Introduction

We are glad you are here. Thank you for taking time out of your day to get to know BoldNet Neo. We are excited to share with you the many ways this system can help you do your work better every day working with Valley Security & Alarm as they transition to Manitou.

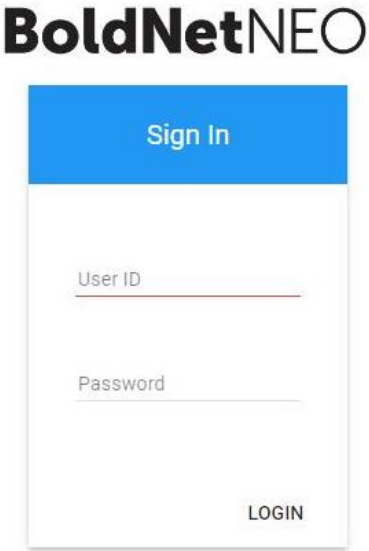
BoldNet Neo

BoldNet Neo is the Web interface for the new Manitou software Valley Security & Alarm 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** that 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.

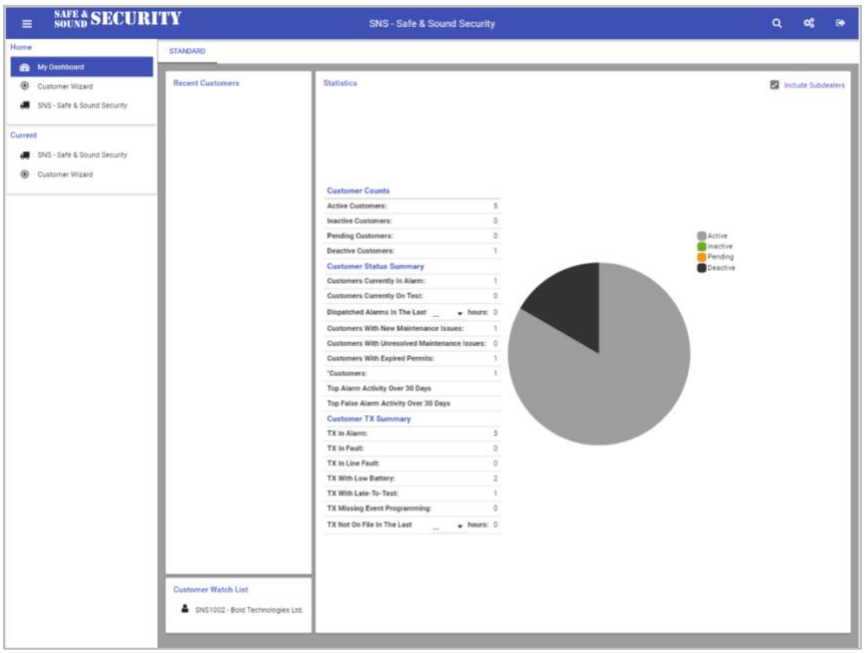
Logging into BoldNet Neo

Valley Security & Alarm 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.



The Dashboard & Settings

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



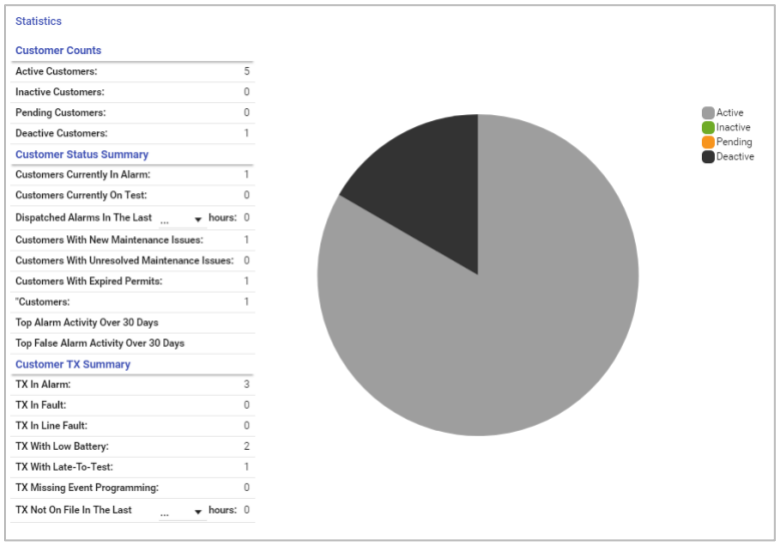
Dashboard

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

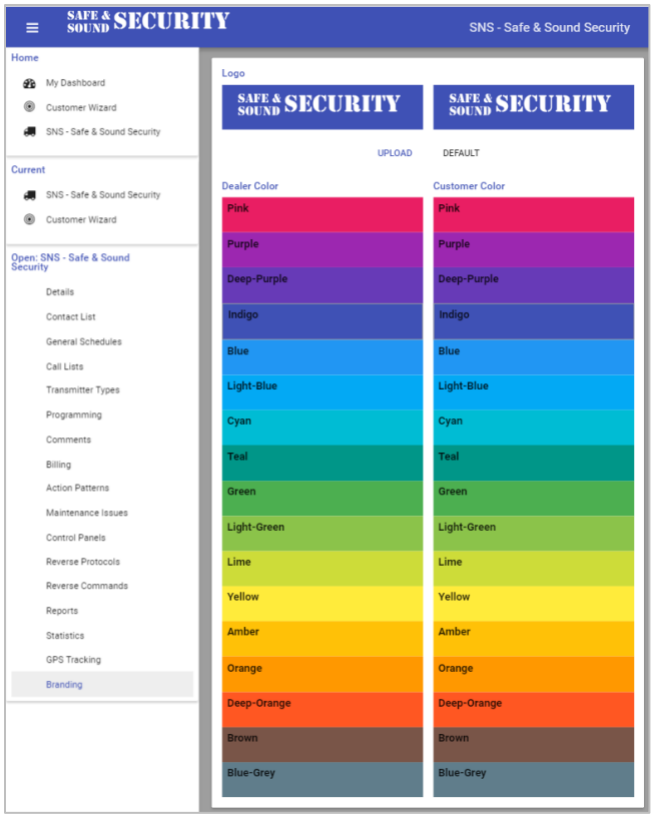
First, the graph shows a breakdown of the customer records showing the number of Active, Inactive, Pending, and Deactivated records.

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.

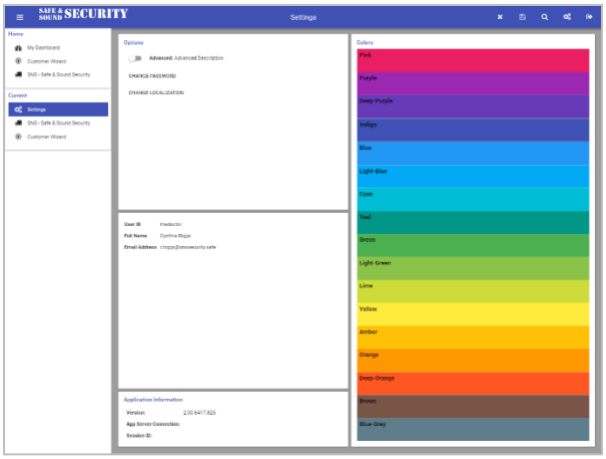


Across the top you see that it is possible to have your company logo. To add your logo to your page:

- 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.
- The save icon  flashes in the upper right-hand corner to remind you to save. Click it to commit your changes.

Settings

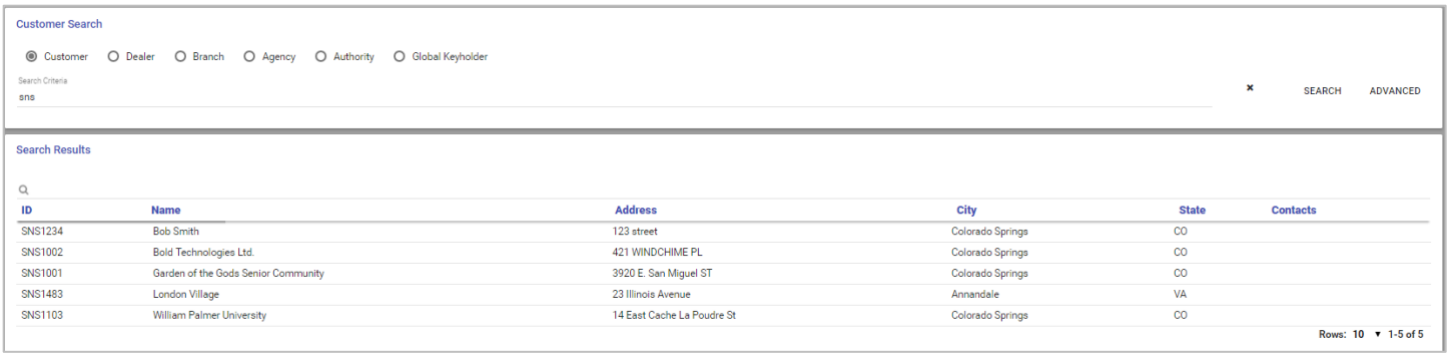
The settings form allows you to customize your personal experience. This is found under the cog icon and here, when allowed, you can choose your own header color, change your password, and set the help information to beginner so that many of the option buttons expand to show their full description. This 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.



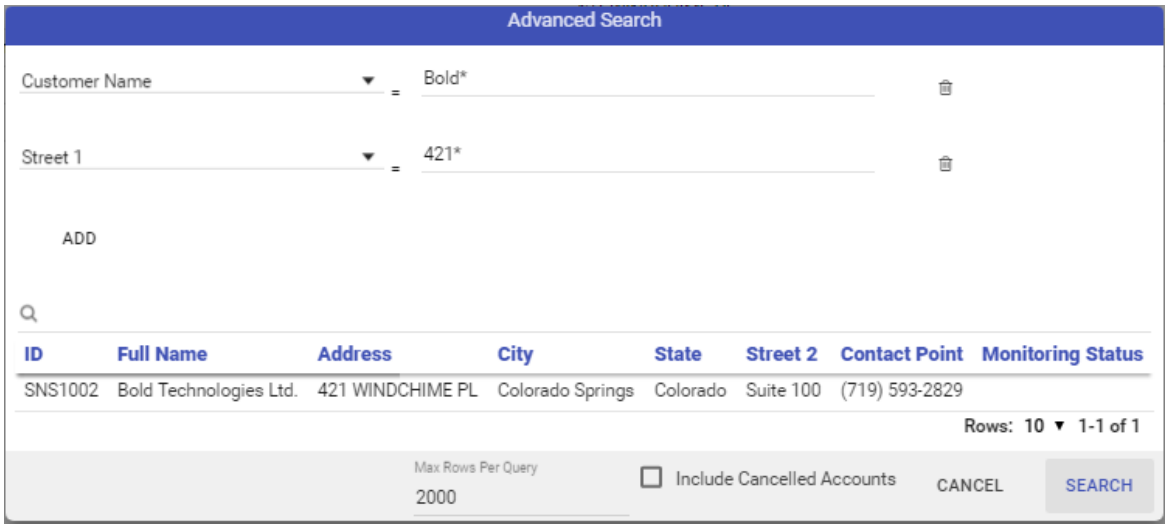
Searching for Customer Records

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.



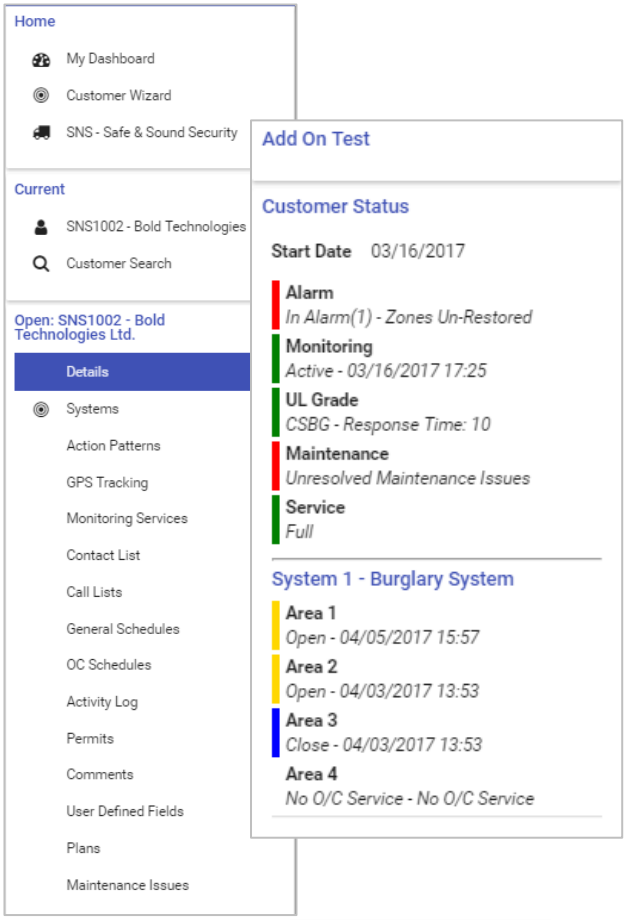
It is also possible to do an advanced search with several search parameters by clicking the word Advanced. Here you can enter different parameters and together narrow down the results.



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

Getting to know the Customer Record

Once the customer record loads, it loads to the main customer page. The first thing you will notice is that there is now more information showing in the left-hand 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

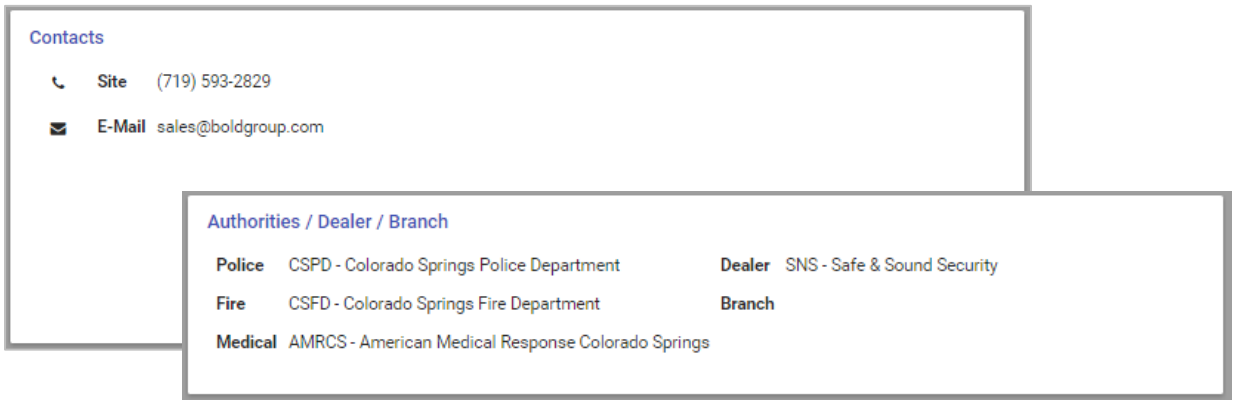
The main customer page is called the Details page. **The details page contains "4 cards." These four cards house all the information specific to the basic customer record. This includes the Account ID, Name, and Address details.**

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.

The Contacts card contains the site specific contact points.

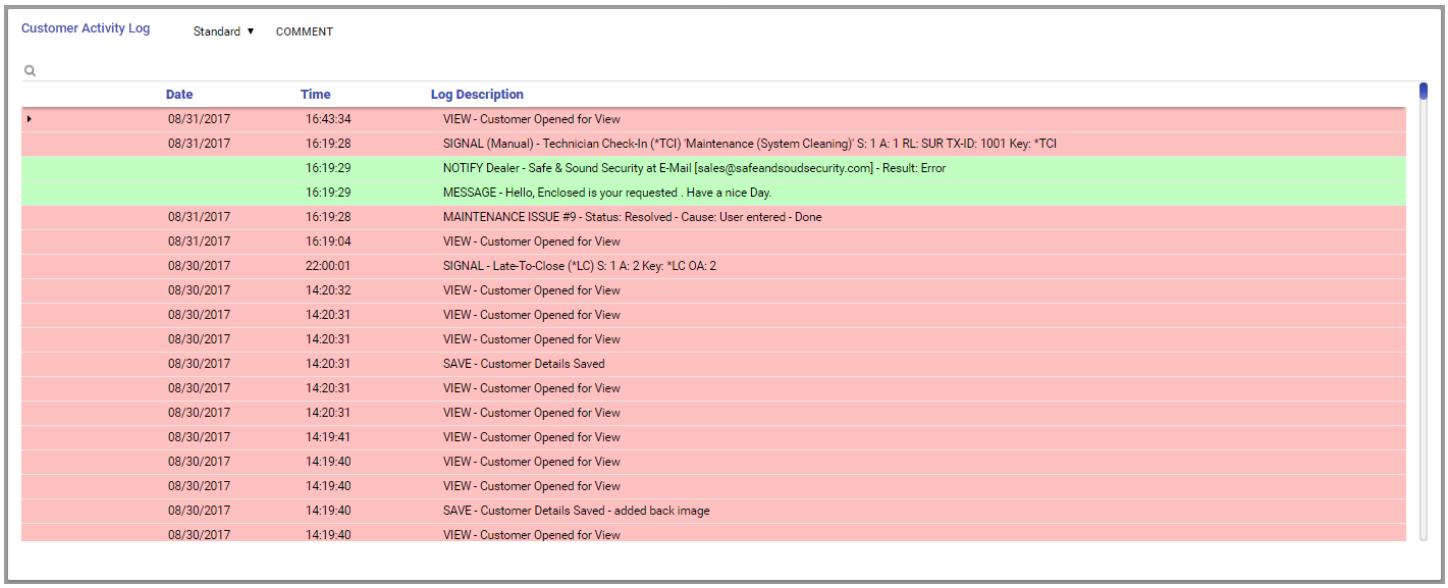
Below the Contacts card is the Authorities/Dealer/Branch card which contains all businesses and Authorities having jurisdiction which relate to this account.



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.



Date	Time	Log Description
08/31/2017	16:43:34	VIEW - 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	NOTIFY 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	14:19:40	VIEW - Customer Opened for View

Systems form

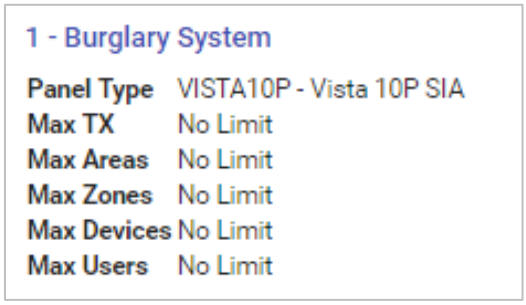
The next form of interest is the Systems form. The Systems form contains all the systems and equipment housed at the monitored location. Different from other software systems, Manitou software can manage all monitoring equipment on a single account.

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.

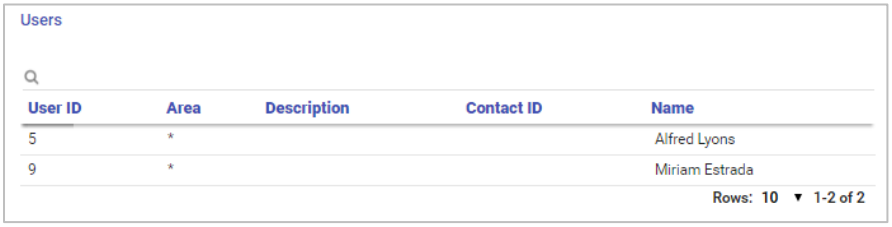
This form contains three cards that display information about the monitored systems.

The upper left-hand card contains the system details.

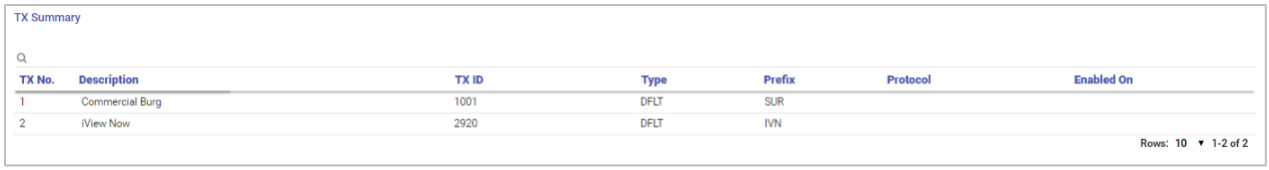
These details show the control panel details including the maximum transmitters, areas, zones, devices, and users.



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



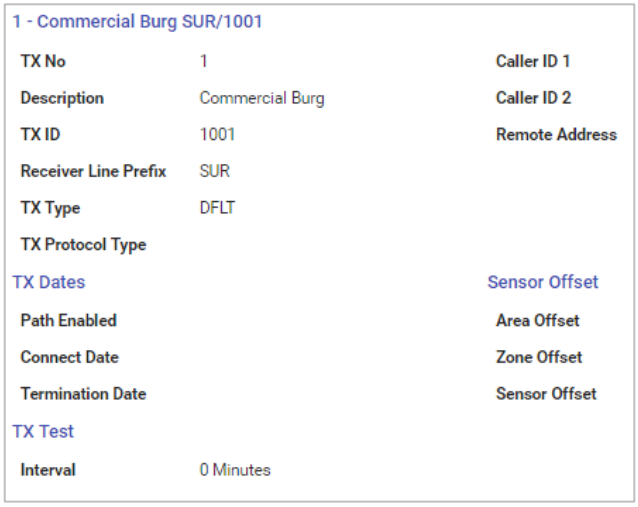
The lower card contains the transmitters (dialers) configured for that system.



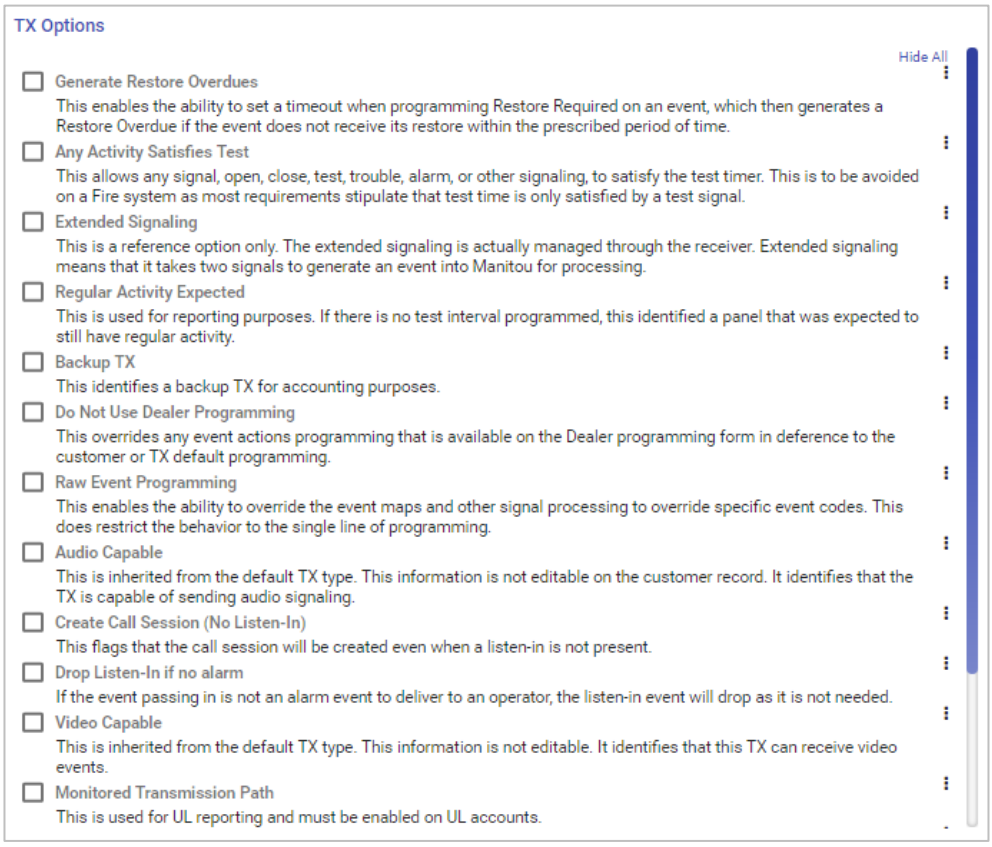
Transmitters

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

The upper left-hand card contains the Transmitter details, including the ID, prefix, Caller ID details, and more.



The upper right-hand card contains the Transmitter options:

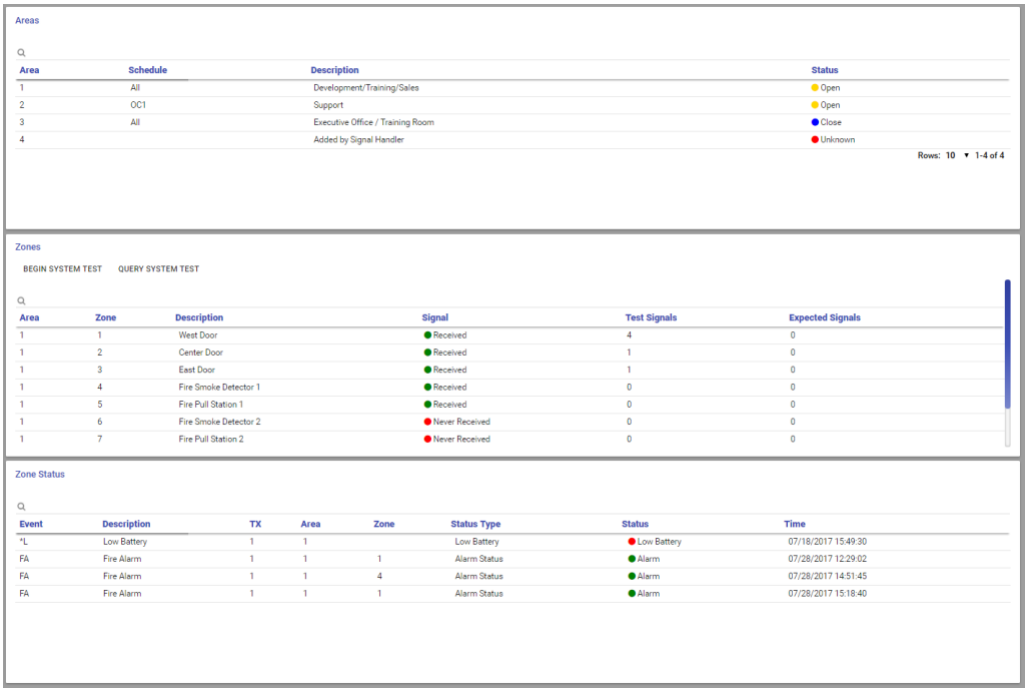


These options can be expanded to reveal what each one means.

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.



Areas

Area	Schedule	Description	Status
1	All	Development/Training/Sales	Open
2	OC1	Support	Open
3	All	Executive Office / Training Room	Close
4		Added by Signal Handler	Unknown

Rows: 10 1-4 of 4

Zones

BEGIN SYSTEM TEST QUERY SYSTEM TEST

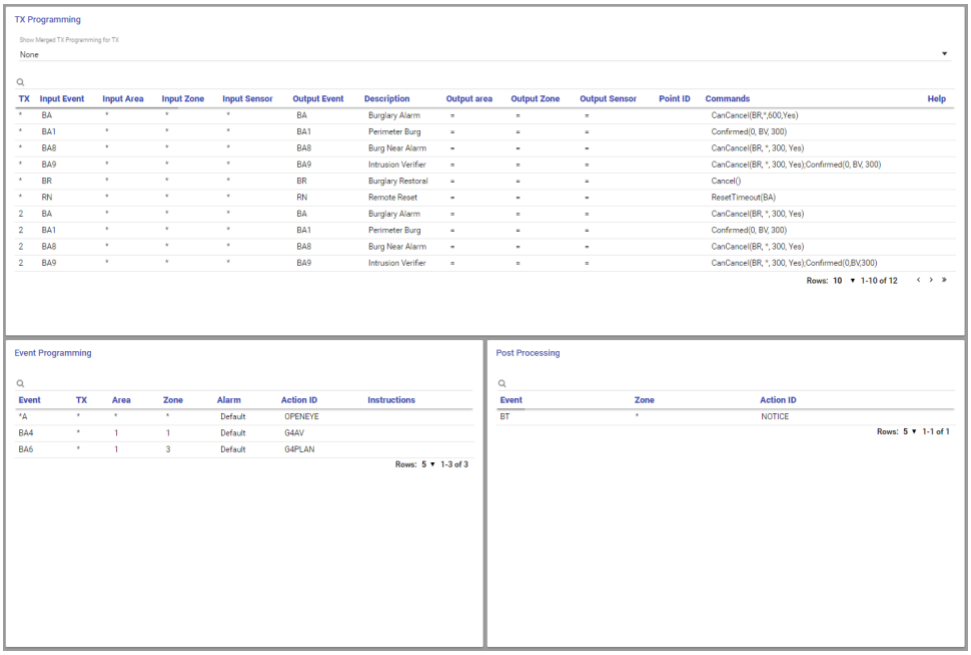
Area	Zone	Description	Signal	Test Signals	Expected Signals
1	1	West Door	Received	4	0
1	2	Center Door	Received	1	0
1	3	East Door	Received	1	0
1	4	Fire Smoke Detector 1	Received	0	0
1	5	Fire Pull Station 1	Received	0	0
1	6	Fire Smoke Detector 2	Never Received	0	0
1	7	Fire Pull Station 2	Never Received	0	0

Zone Status

Event	Description	TX	Area	Zone	Status Type	Status	Time
*L	Low Battery	1	1		Low Battery	Low Battery	07/18/2017 15:49:30
FA	Fire Alarm	1	1	1	Alarm Status	Alarm	07/28/2017 12:29:02
FA	Fire Alarm	1	1	4	Alarm Status	Alarm	07/28/2017 14:51:45
FA	Fire Alarm	1	1	1	Alarm Status	Alarm	07/28/2017 15:18:40

Programming

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



TX Programming

Show Merged TX Programming for TX

None

TX	Input Event	Input Area	Input Zone	Input Sensor	Output Event	Description	Output area	Output Zone	Output Sensor	Point ID	Commands	Help
*	BA	*	*	*	BA	Burglary Alarm	=	=	=		CanCancel(BR,*,600,Yes)	
*	BA1	*	*	*	BA1	Perimeter Burg	=	=	=		Confirmed(0, BV, 300)	
*	BA8	*	*	*	BA8	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 Reset	=	=	=		ResetTimeout(BA)	
2	BA	*	*	*	BA	Burglary Alarm	=	=	=		CanCancel(BR, *, 300, Yes)	
2	BA1	*	*	*	BA1	Perimeter Burg	=	=	=		Confirmed(0, BV, 300)	
2	BA8	*	*	*	BA8	Burg Near Alarm	=	=	=		CanCancel(BR, *, 300, Yes)	
2	BA9	*	*	*	BA9	Intrusion Verifier	=	=	=		CanCancel(BR, *, 300, Yes);Confirmed(0,BV,300)	

Rows: 10 1-10 of 12

Event Programming

Event	TX	Area	Zone	Alarm	Action ID	Instructions
*A	*	*	*	Default	OPENEYE	
BA4	*	1	1	Default	G4AV	
BA6	*	1	3	Default	G4PLAN	

Rows: 5 1-3 of 3

Post Processing

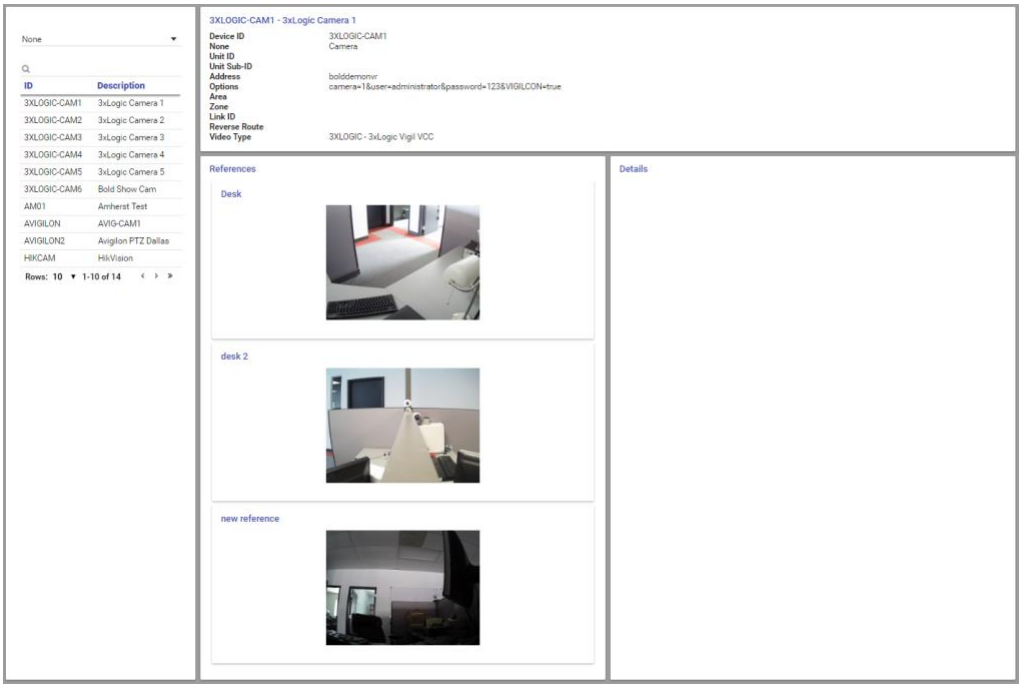
Event	Zone	Action ID
BT	*	NOTICE

Rows: 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 form 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:

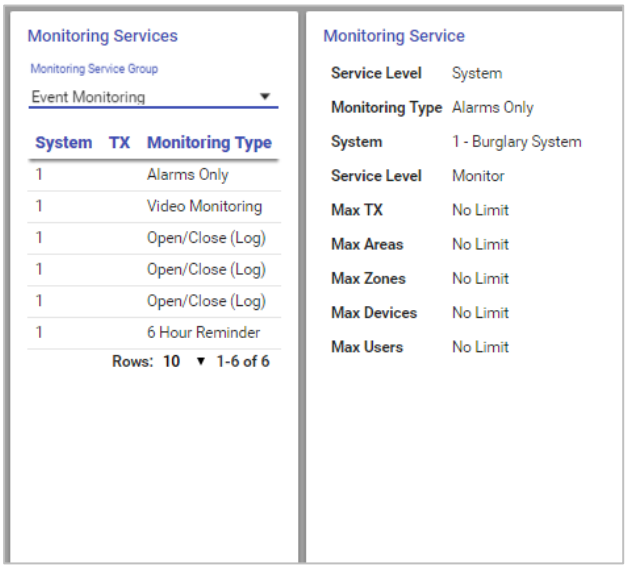
And then masked for understanding:

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 Valley Security & Alarm can arrange additional training for you if you wish to become involved with building your own Action Patterns.

Monitoring Services Form

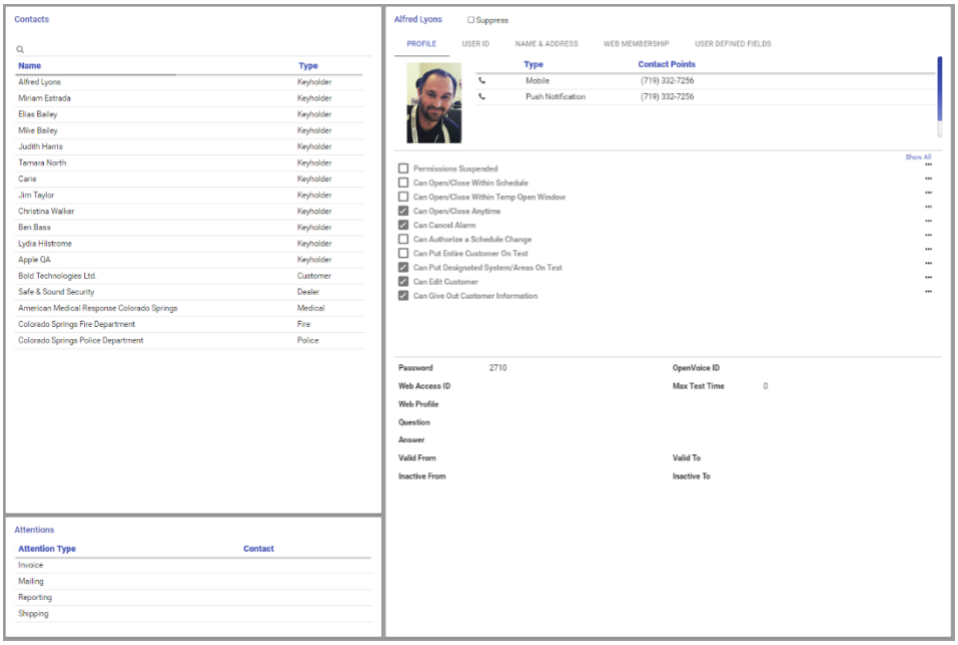
The next form of interest for you will be the Monitoring Services form. Based on the data entered on the other forms of the customer record, the Monitoring Services form loads with the services available to the account. Your individual billing may vary. Please note that this form has several different 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.



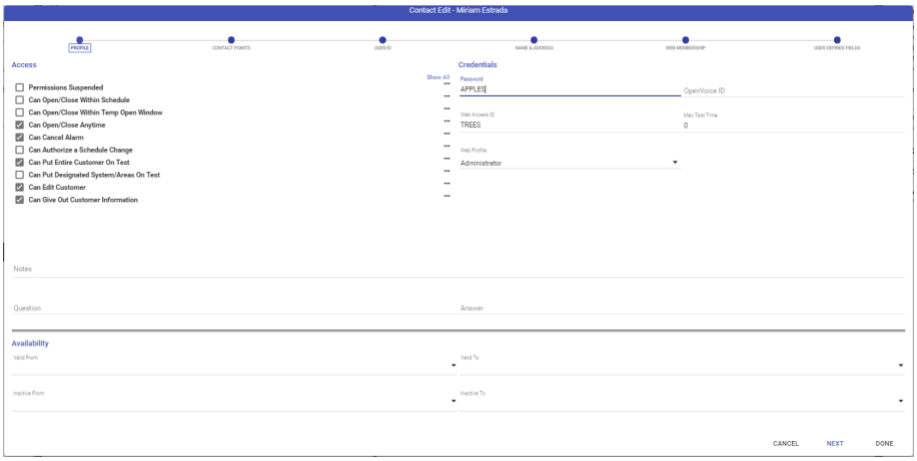
Contact List Form

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.

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 editing, or adding, a contact there are several items available:



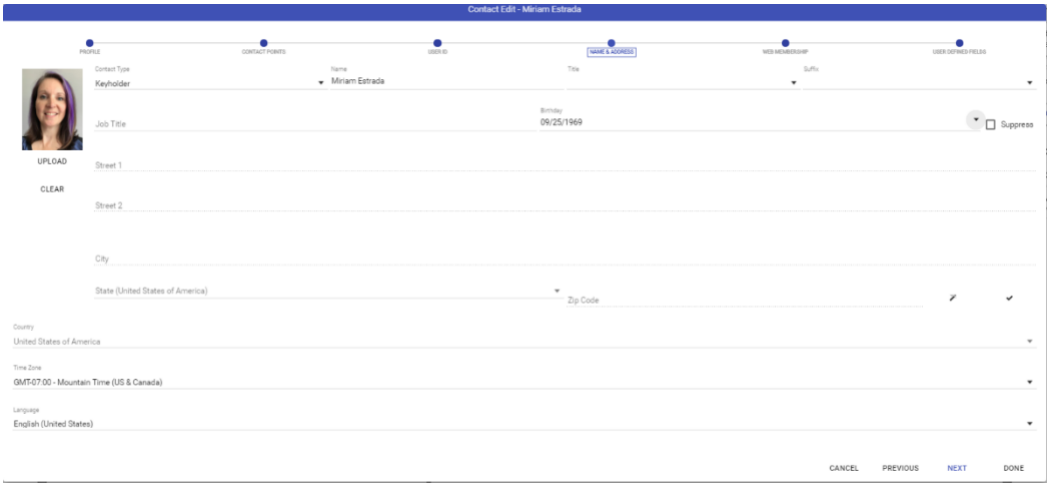
The dots across the top are called waypoints. Each represent an individual page. The Details page contains the permissions, passwords, Web Access ID, Web Profile, Notes, Question and Answer (which can be used to validate a user), and availability and inactivity dates.

Clicking Next moves between the waypoints.

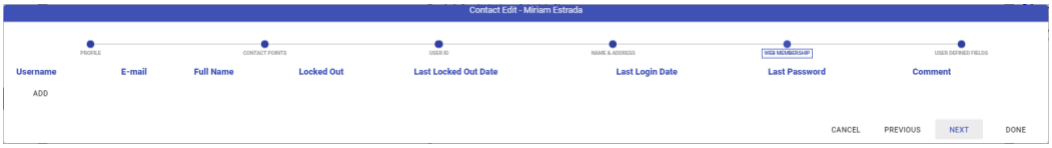
The **Contact Points waypoint** contains the phone numbers, email addresses, and any Web addresses that pertain to that person. Note that is possible to assign a schedule to the telephone numbers to ensure that phone numbers are called only when they are available.

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

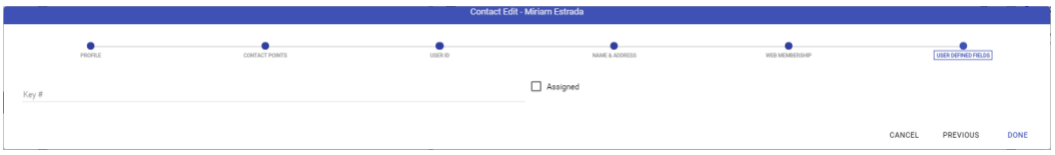
The **Name & Address waypoint** allows you to enter further detail about the keyholder, including their address, to upload a mugshot of the person, their birthdate, language, and time zone. The mugshot can come in handy when you have video at the location. Time zone is also useful when considering when 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*.

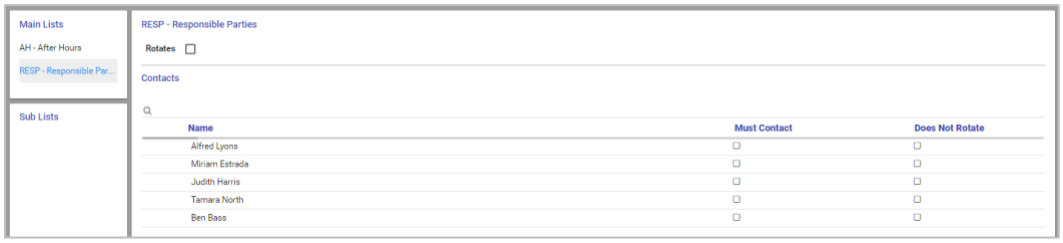


The **User Defined waypoint**, may, or may not, contain data for you to include about your Contact person.



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.

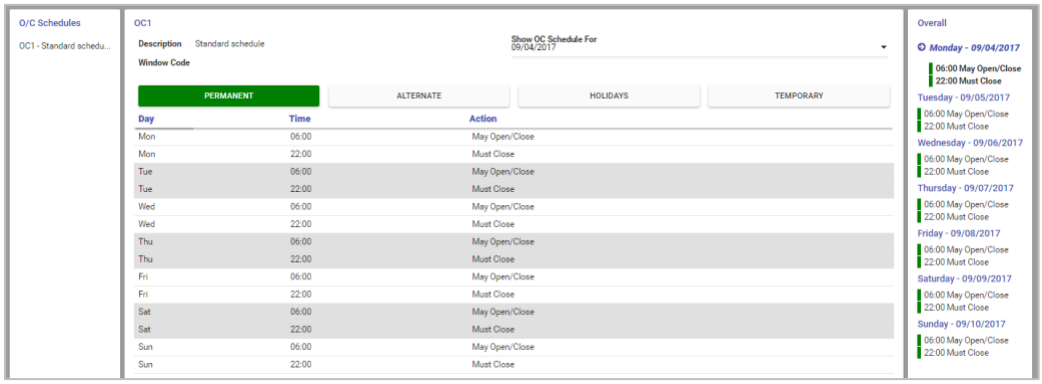


Main Lists may contain people, authorities, agencies, anyone. Sublists may only contain people and are often used when rotating people on a weekly or monthly basis.

General Schedules Form

General Schedules may be of interested 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

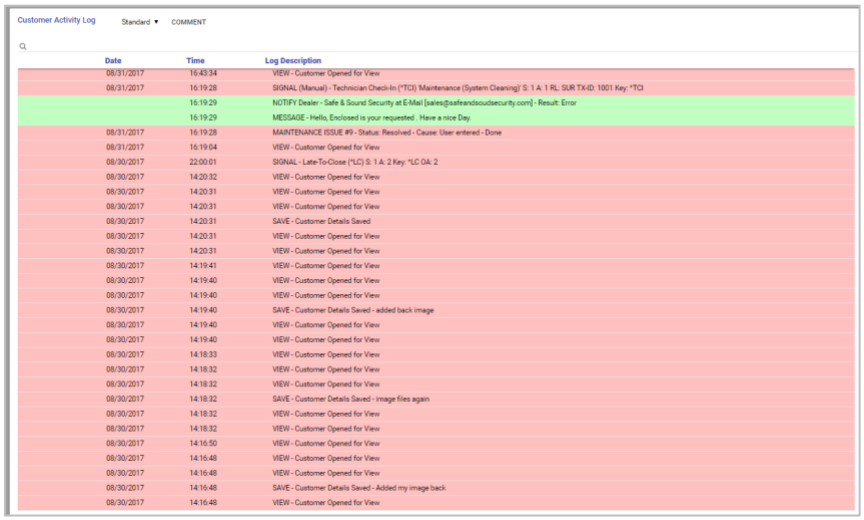


Open/Close Schedules in BoldNet Neo are very easy to read and are color coded. Permanent schedules, the schedule that is used when nothing is overriding it, is green. Alternate schedules, which is a temporary schedule that is greater than one day (such as holiday hours or a summer schedule), are yellow.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

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



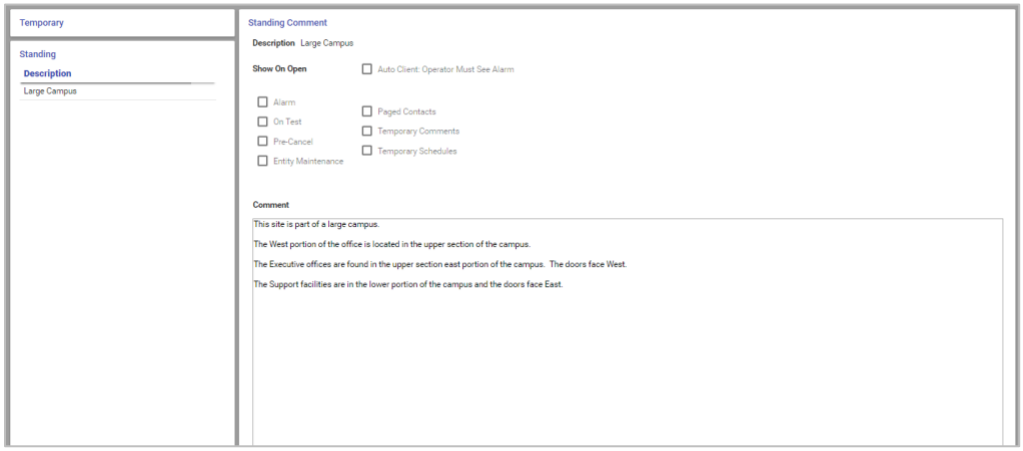
The customer activity log is a full page view of the same activity log you can view on the Details form. This has the same functionality and features.

Permits Form

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

Comments Form

The Comments form have 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.

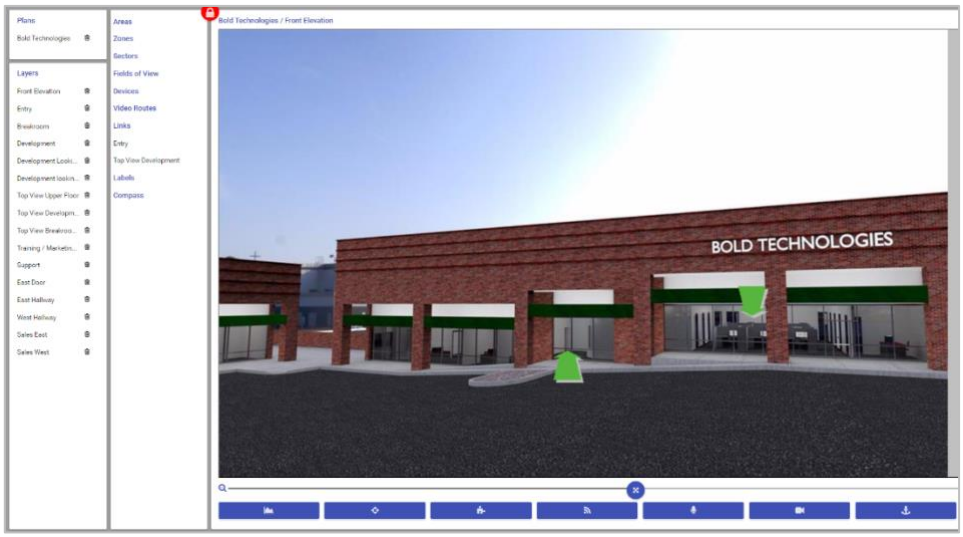
User Defined Fields Form

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 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 show 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.

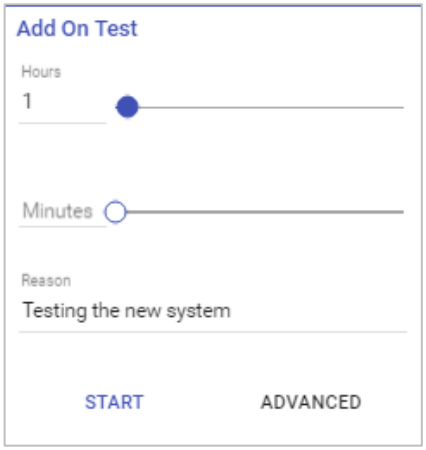
Reports Form

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.

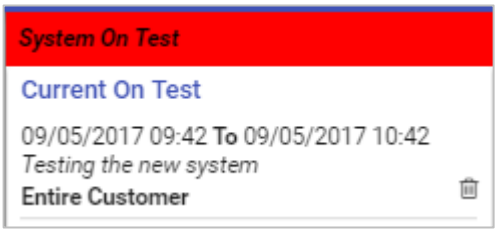
Placing a Customer Record On Test

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 right-hand frame expand the Add On Test section, set the Hours and Minutes, enter a reason then press Start.

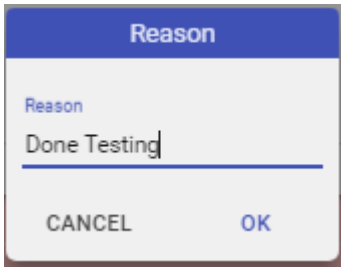


This places the entire customer account On Test for the period of time selected.



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.

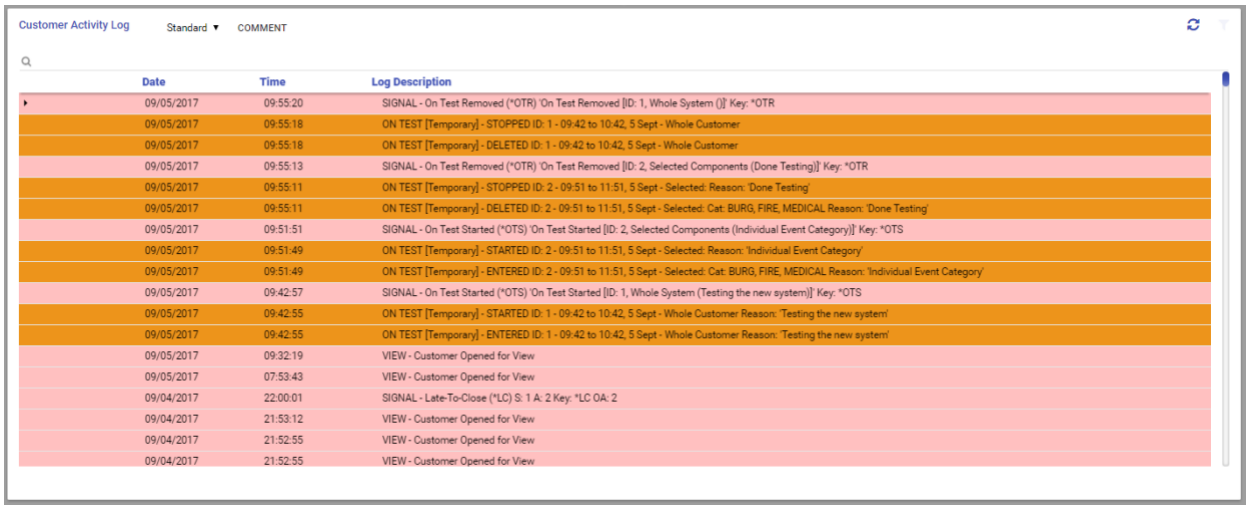
To remove an On Test, simply click the Trash can icon and verify that you wish to remove the On Test and enter a reason for the removal of the On Test.



Reviewing the Customer Activity Log

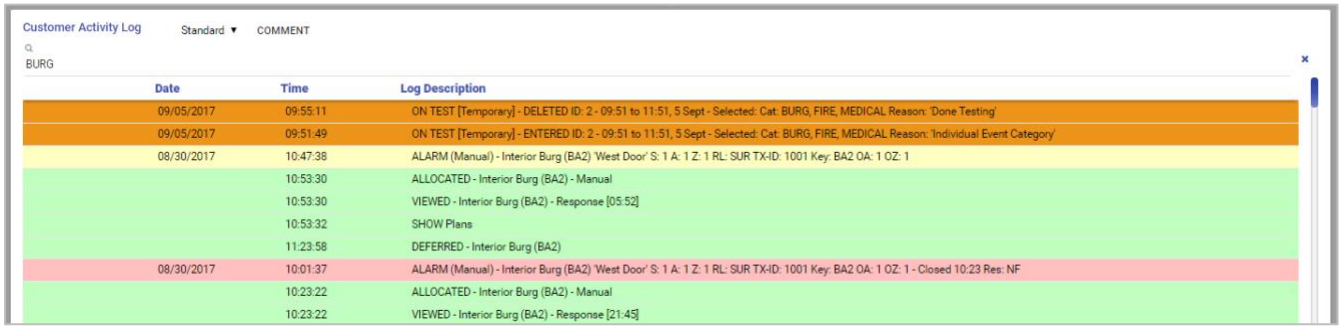
The Customer Activity Log contains all the history of the changes made, the alarms and signals that processed through it and more.

The Activity log displays with 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 on 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.

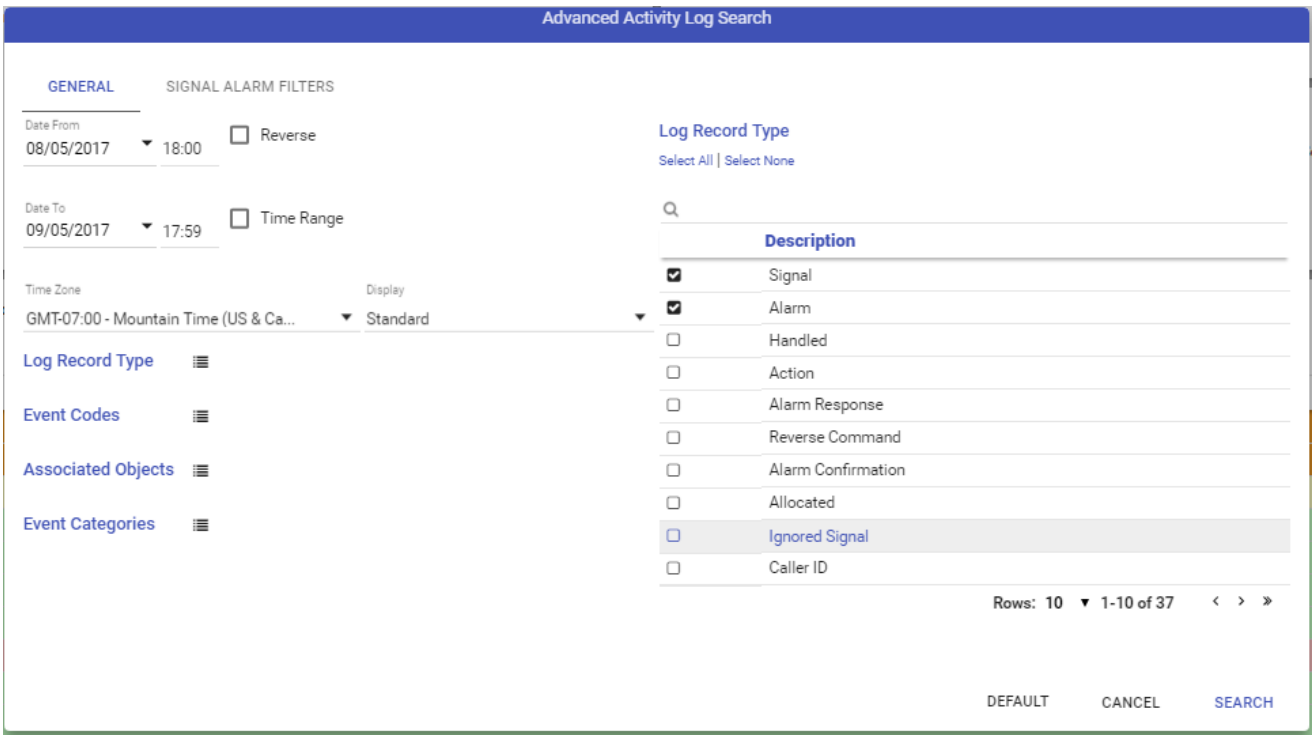


It is possible to filter the alarm queue in two ways:

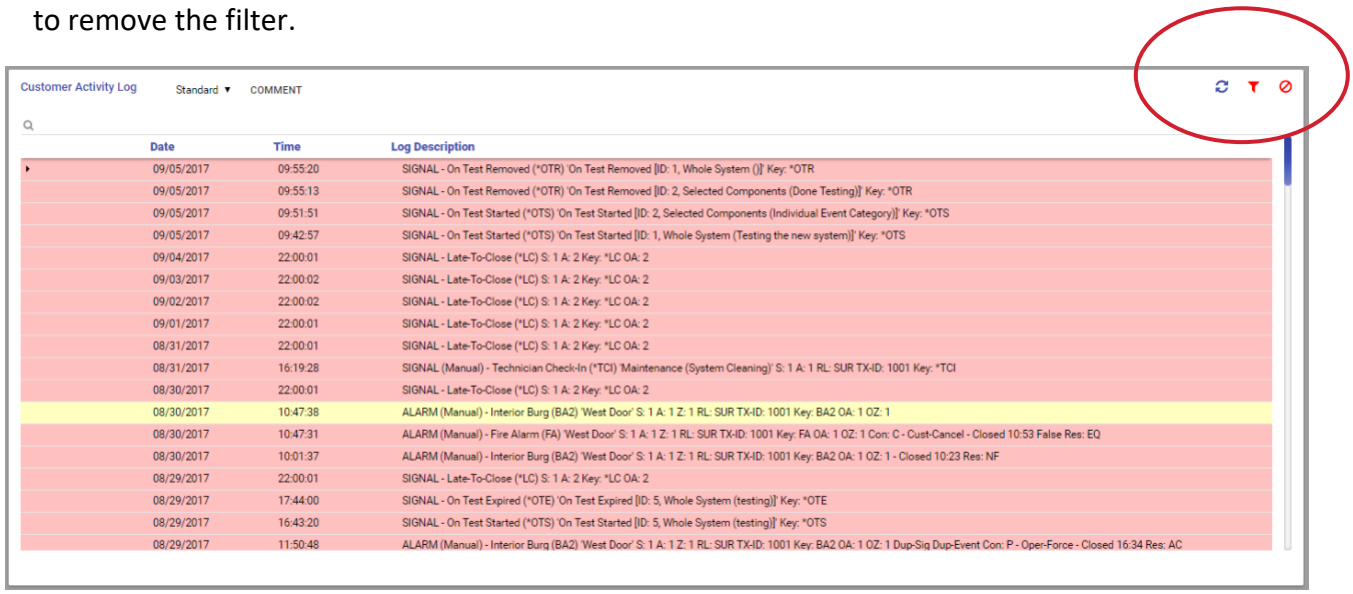
1. By typing a specific word into the search field at the top of the log.



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



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

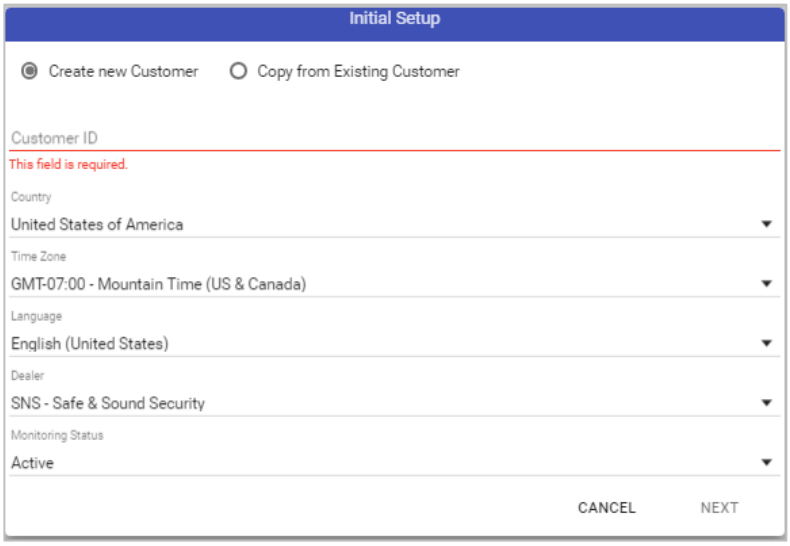
Use the New Customer Wizard to create a new customer within BoldNet Neo. When you click the New Customer Wizard you are prompted to either create a new customer or to create a new customer based on an Existing Customer. It is a whole lot easier and faster to create a new customer based on an existing 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.

Valley Security & Alarm will provide you with your Customer ID standards. Please follow those exactly to save the monitoring center time making corrections.

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

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.

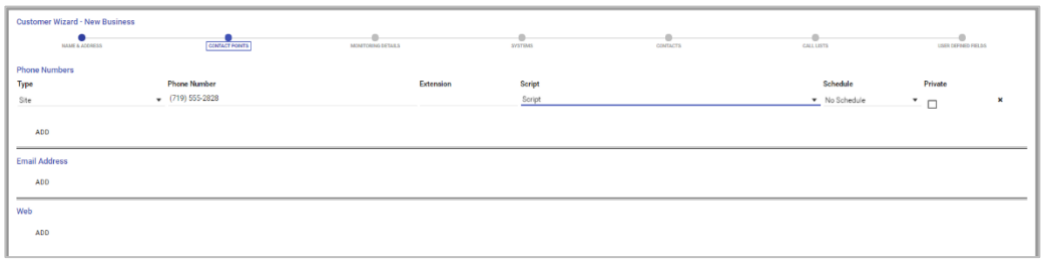
Account Types are: Normal, Main, Sub, and System:

- 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.

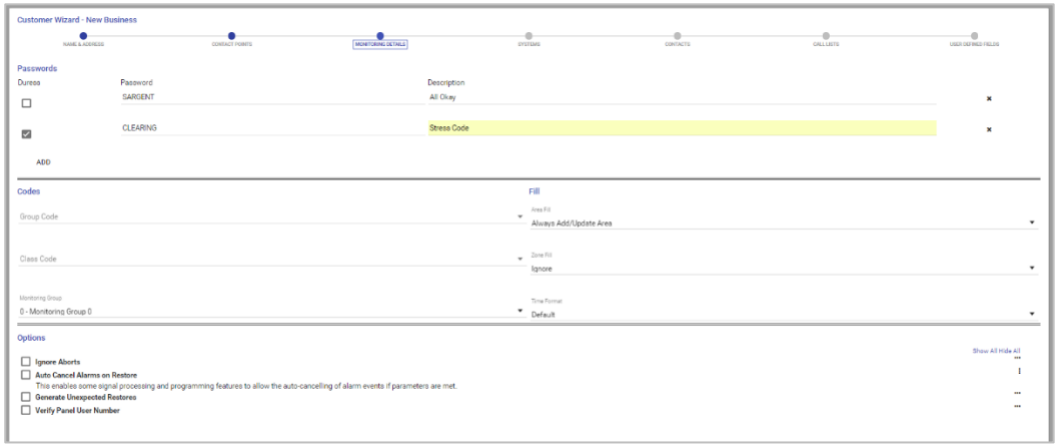
Once all the data is in place you are ready to move on to the next waypoint and can start entering the site-specific contact points, by clicking Next.

Contact Points Waypoint



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



The Monitoring Details waypoint contains the site-specific passwords, including duress codes, Group Codes and Class Codes. If you use them, 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

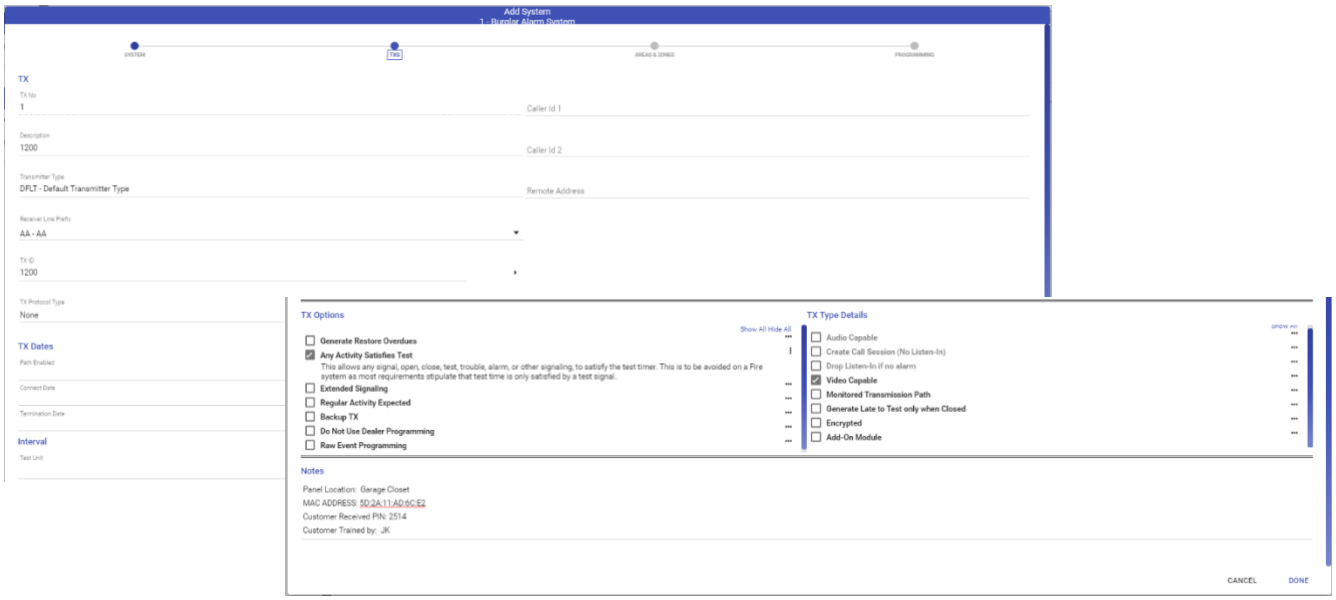
The Systems waypoint has several elements. First you can add a system, then the transmitter, then the areas and zones, and finally the programming. To ease this process it is possible to copy and paste some of this information into the wizard as you are entering your data.

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

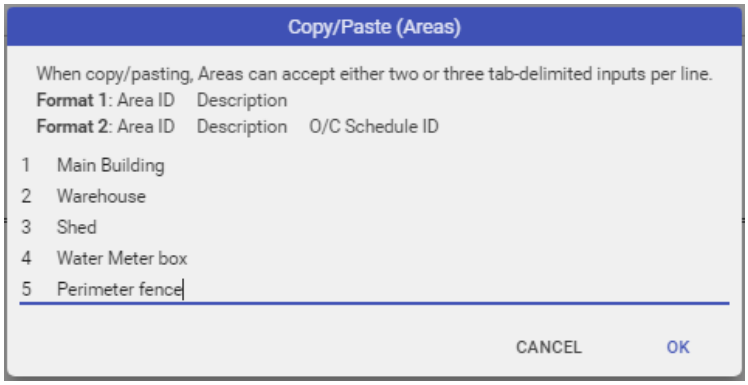
Give the transmitter a description. Select the Transmitter Type. Select the Available Transmitter Receiver Line Prefix, Click the Next Transmitter ID arrow to get the next available transmitter ID in your range, select the appropriate options, and add any appropriate notes, then click Done. Repeat for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



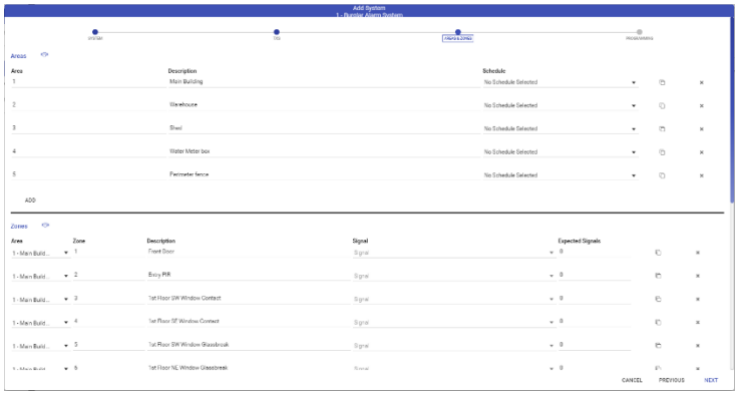
Add Areas and Zones

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

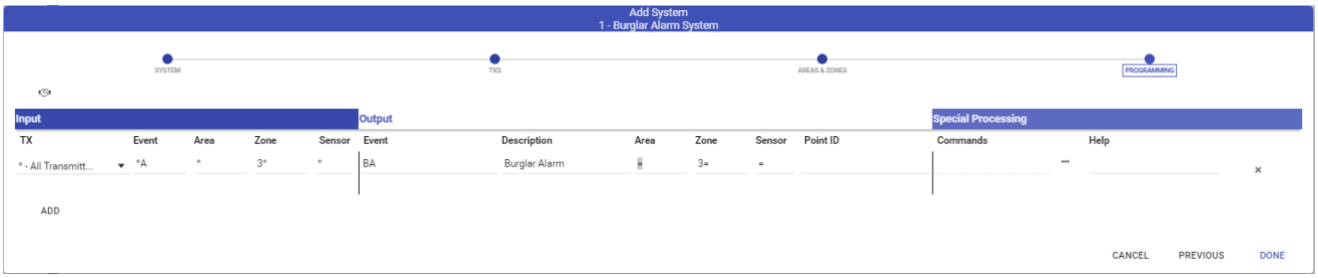


Enter Programming (if appropriate)



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.



Input is what is coming in from the panel. A non-intelligent alarm presents 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.

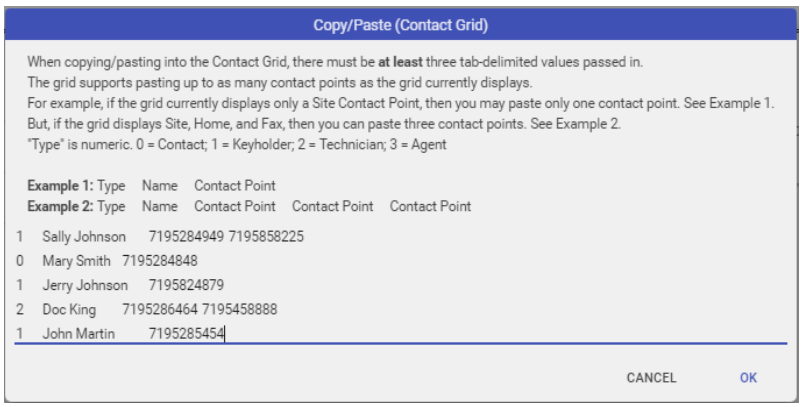
The output is what we want to present to the alarm operators. In this instance we want the alarm to be a burglar alarm. So we selected BA for the event code. On the output side we have equal signs that means we want what we got in on the input side on the output side. We put 3= on the zone because we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

The Commands section is for more advanced processing of the signals. Valley Security & Alarm can arrange for some more advanced training on these at a later date.

Repeat programming for any translations, as required, then click Done. Add as many systems as needed then click Next.

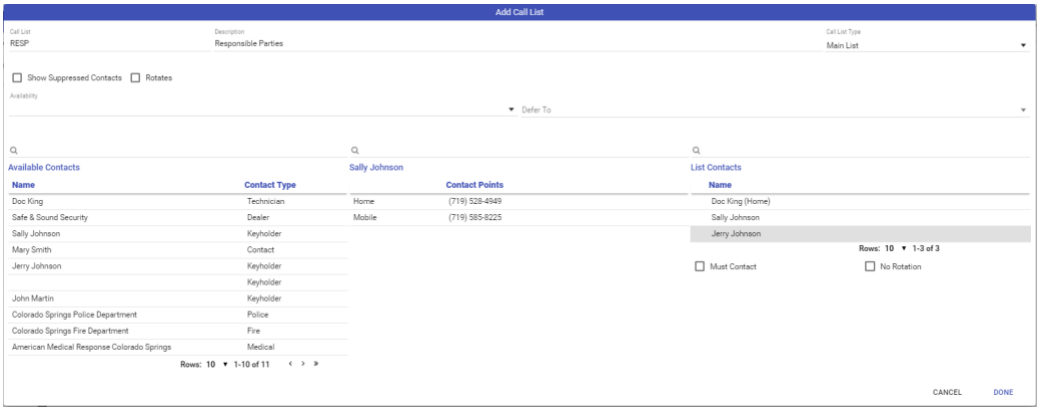
Contacts Waypoint

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. 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



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 for you to be able to place the account On Test and send in and receive signals.

Making Changes to Customers

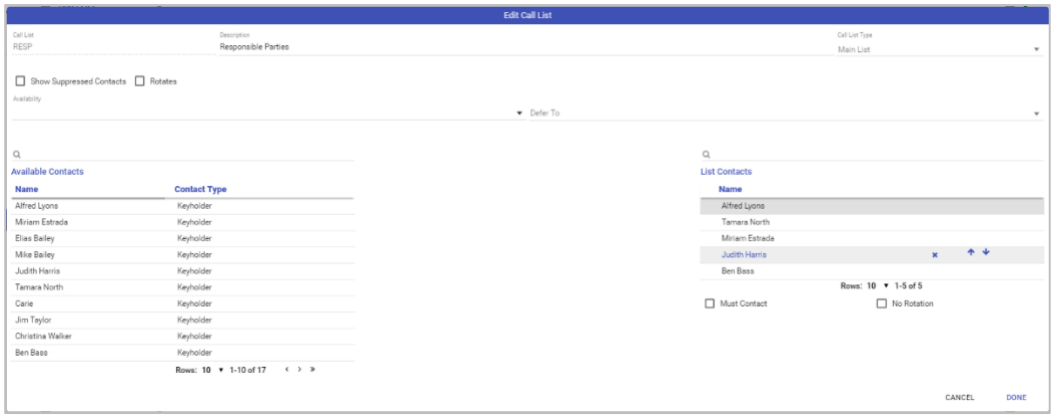
Changes are made to customers by clicking the pencil icon on the appropriate cards.

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 Contact Points waypoint.
- Make the appropriate change.
- Click Done.
- Click the Save icon.
- Enter your reason for your change.

To Adjust the Order of Who Is Called On the Call List

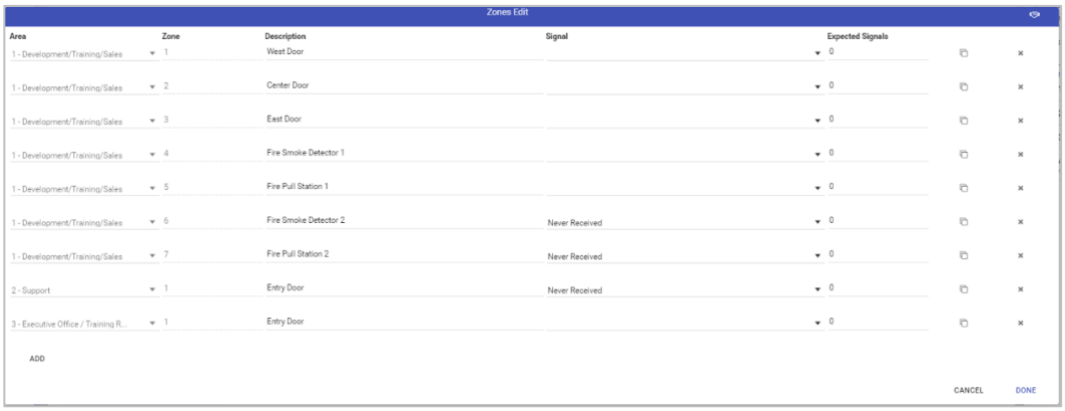
- Navigate to the Call List on the Customer Record.
- Click the Call list to change.
- Click the pencil to edit the Call List.
- Click the Person or contact point and drag or click the up/down arrow to move them to their appropriate place.
- After making all appropriate changes, click Done.
- Click the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



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.

Adding 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 and the comment will also append 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 then select Reports, and System Reports.

The Reports form is broken down into five sections:

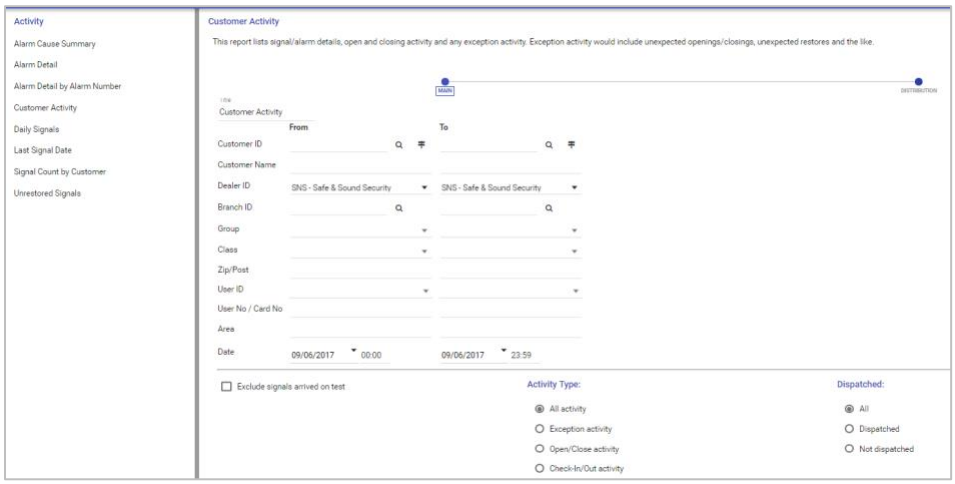
- Activity – All reports related to the customer activity log.
- Custom – Customized reports added to the system.
- Maintenance – Reports relating to Account maintenance.
- Master File – Reports that list data.
- System – Reports that provide data about the systems tied to the customer records.

Common reports for BoldNet Users

- 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

- Select the desired report 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.



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