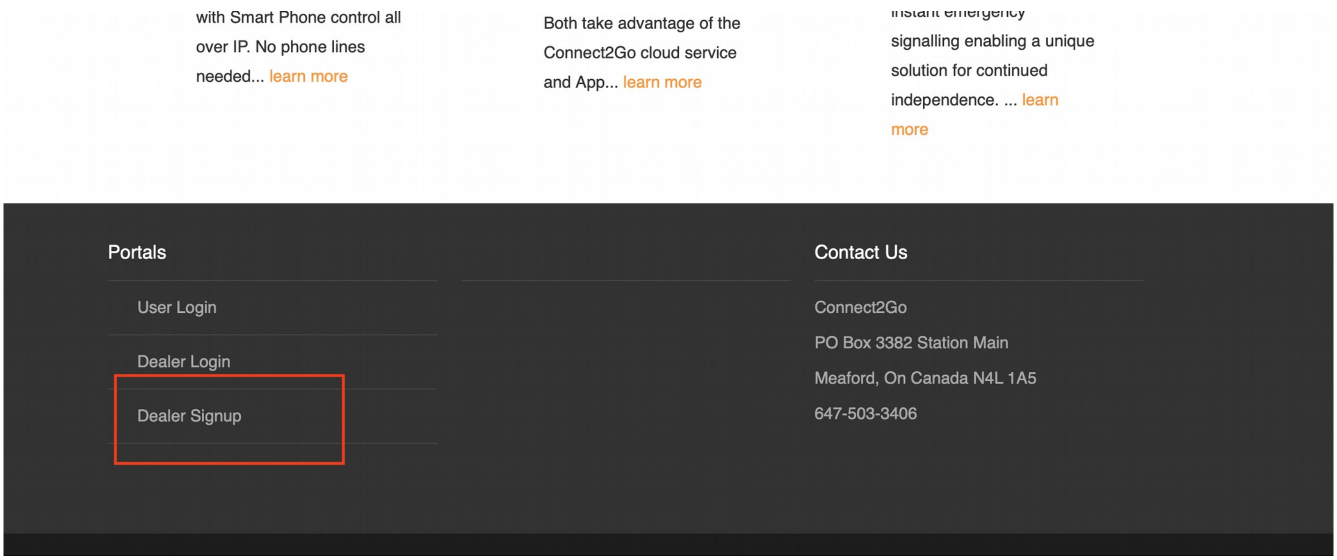
The following document outlines how to set up a new Pro account and new Client accounts under that.

Before you can set up any clients you must have an active Pro Account.

While the **Connect2Go Portal** is compatible with all browsers, for user with PCs it is highly encouraged that a standards compliant browser such as Firefox, Chrome or Safari for Windows is used.

Step 1: Set Up A Pro Account

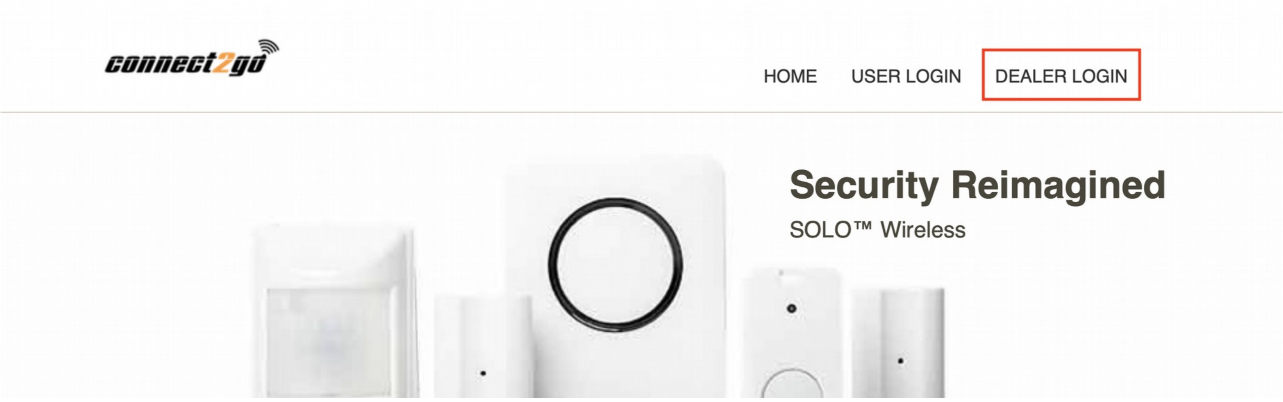
1. In a browser, navigate to the Connect2Go home page www.connect2go.com
2. Scroll to the bottom of the page and select the Dealer Signup link.



3. The **Connect2Go Pro Program** description and information and **Pro Account Request Form** should appear.
4. Request a **Pro** account by filling out the form and clicking **Submit**.
5. Once the request is reviewed by Dealer Relations, you will receive and email with your Pro ID, login credentials and a link to the Pro Account Enrolment No-Obligation Form. This form must be signed and send back to Dealer Relations before your account is fully active.
6. Review, sign, scan and return the Enrolment Form by email to dealer_relations@connect2go.com.
7. Once received, you will get an email indicating your account is fully active. Now you are able to log in and set up a Customer Account.

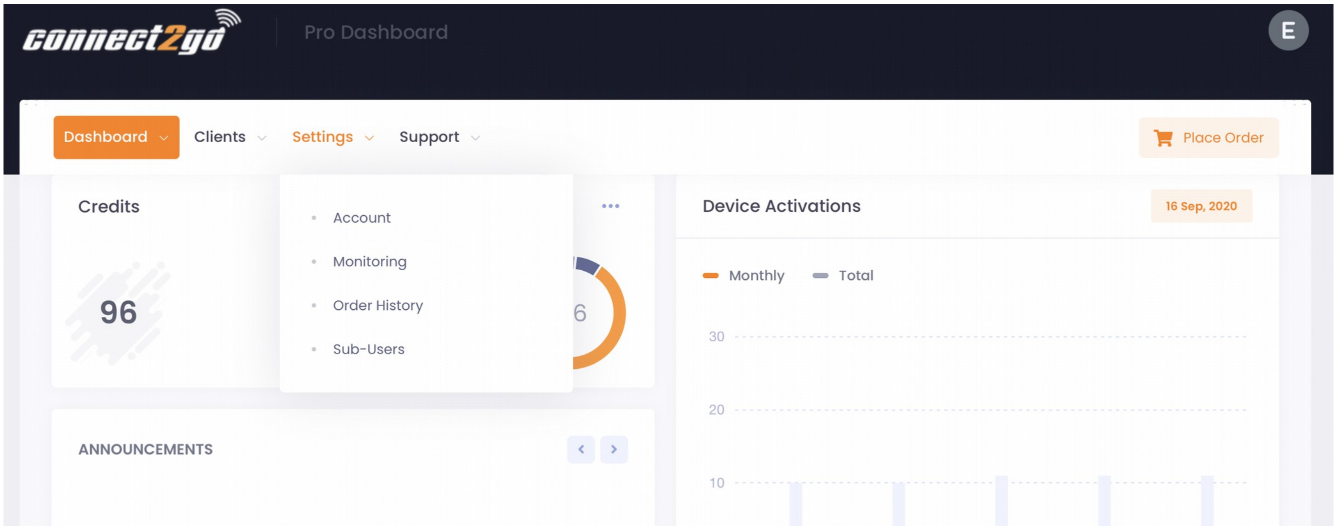
Step 2: Log In To Your Pro Account

1. In a browser, navigate to the Connect2Go home page www.connect2go.com
2. Click the **DEALER LOGIN** link on the right side of the page.
3. You will be directed to a login screen where you can enter the credentials emailed to you in Step 1.



Step 3: Customize Your Pro Account

Once logged in to your Pro account click on the **Settings** link to view your options.



1. **Account**: Most of the options here are self explanatory but the important ones are **email report settings** and **dealer timezone**.
    - **Email Report Settings** - You can opt to receive a “morning report” which will include information all

of you customers if at least one of the issues in the checkboxes are selected. If none of the trouble conditions exist on any of your customers, you will not receive a report.

- **Dealer Timezone** - From here you should select the largest city that is in your political/geographical timezone. These are ICANA timezones and account for the wide disparity in daylight savings time protocols around the world. The timezone you select here will reflect the time presented to you in your portal and your dealer reports. It will also become the default timezone for all new customers that you add.
- **Global Portal Settings** - This list of "checkboxes" defines the default settings for any new customer that you create. You can limit your customer to certain features be un-selecting a checkbox.
- **Global Settings Changes** - If you make a change to your global portal options and want to retro-actively apply these to existing accounts, select this option.
- **Customization** – In this section you can customize the look of the end user portal with such as adding the name of your company or displaying your logo. By default the customer portal says Connect2Go

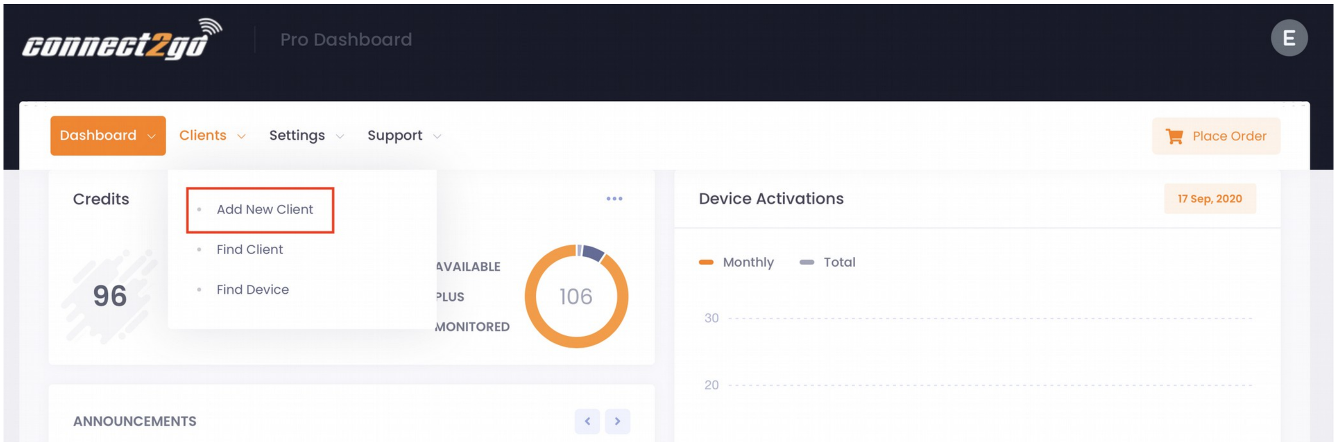
2. **Monitoring**: From this page you can set the default receiver settings for your station that will be used when you enable a new monitored customer. This saves you entering your station information each time you enable monitoring. Optionally you can globally change all of your existing customer's receiver settings at once. This is useful if your station tells you to move your customers to a different set of receivers.

3. **Order History**: Provides a list of past orders that can be printed if a copy of an invoice receipt is required. (Note: order history only shows orders produced in the current version of the portal not the classic version)

4. **Sub-Users**: Sub-users are usually your employees that you have delegated to have access to your pro account. You can select two levels of sub-users: admins and installers. More information on how to work with sub-users is included in the sub-user page of the portal.

Step 4: Set Up A New Client (Customer)

Click the **Clients** menu and then select the **Add New Client** link.



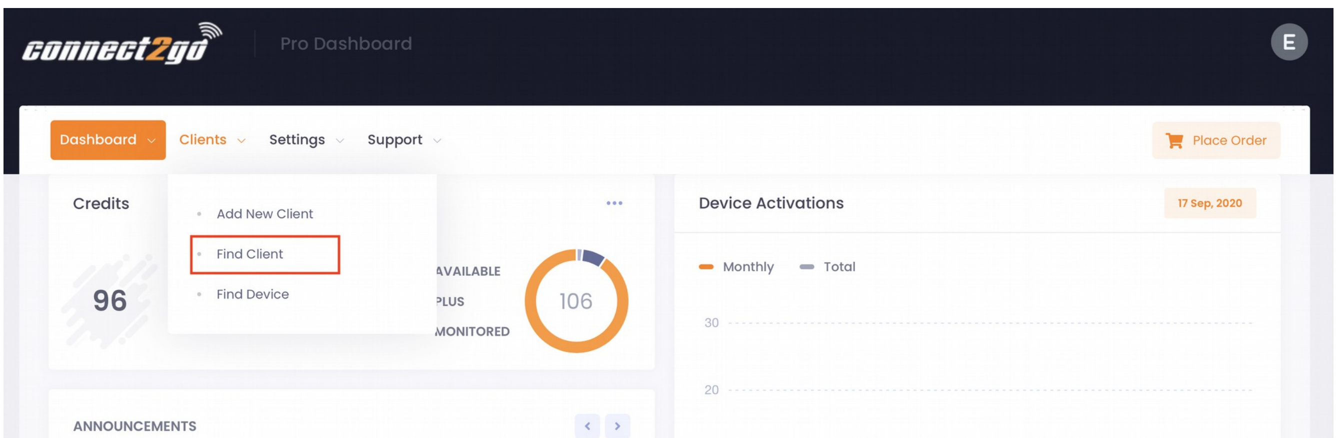
You will be presented with a New Client Wizard, just follow the steps and once all the information is correct click the Submit Button. If successful you will be taken to the client's details screen.

Note: The email account you use to register the client will also be their user id for login to the client portal.

Once the customer's account is created, the customer will automatically receive an email with login credentials and instructions on how to login using the email address you entered during account creation. If they do not receive this email, advise them to check their "SPAM" or "Junk" folders.

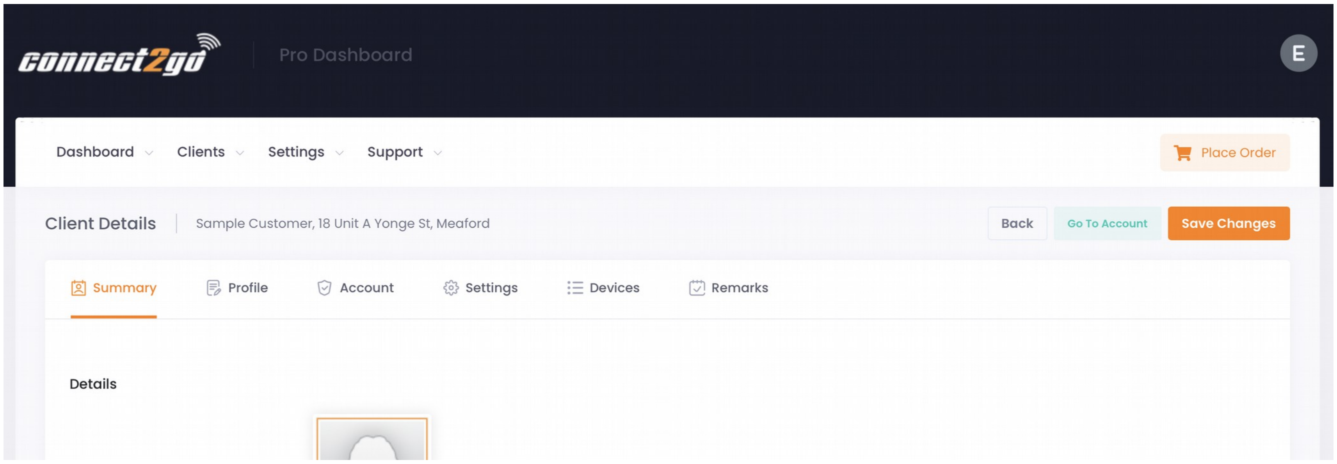
Step 5: Add A Device To A Client

If you aren't already on the Client Details screen for the client you just added, you can search for any client by clicking the **Clients** menu link then selecting **Find Client**.

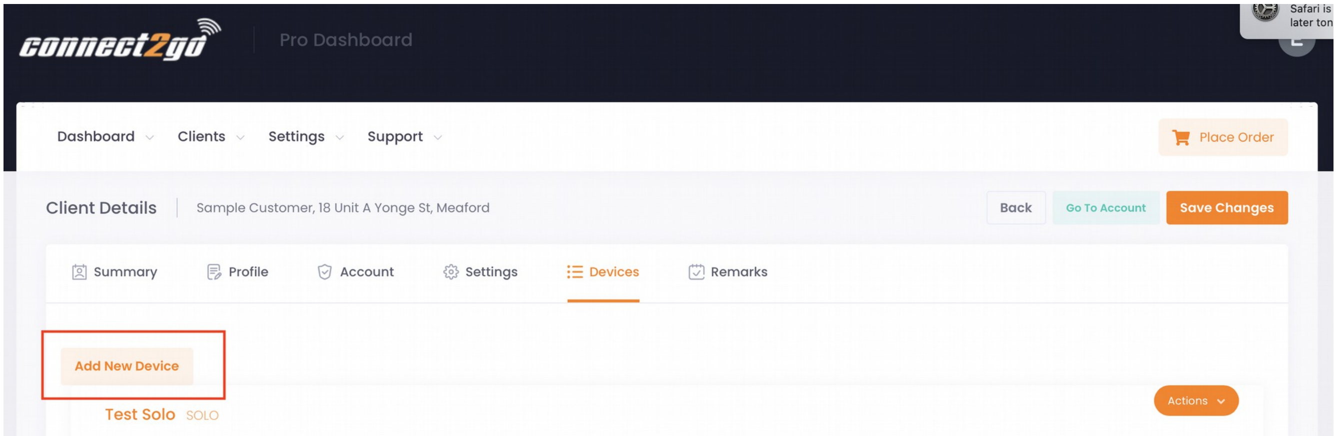


The Client Details screen consists of six tabs. See diagram below...

1. **Summary** – A summary of customer information and any devices they have.
2. **Profile** – Edit name and address information.
3. **Account** – Options for password reset, disabling of accounts or username changes.
4. **Settings** – Client portal features that can be enabled or disabled on an individual basis.
5. **Devices** – All devices attached to the client account with a list of context sensitive actions for each device. Within this tab is the Add New Device option.
6. **Remarks** – Persistent remarks about the clients account can be added and viewed here.



To add a new device to a client account, navigate to the **Devices** tab and then click the **Add New Device** button.



You will be presented with a form where you can select the device type and add the MAC address for the device.

The MAC is a 12 Digit ID number starting with 001C2A. It consists of HEX digits so only the numbers 0-9 and the letters A-F are valid. The MAC is found on the board or product housing and also appears on the box.

Step 6: Physically Install The Device(s) At The Client's Location(s)

Now that the device has been added to the customer account, it can be physically installed at the customer's location. For hardware hook-up of a security module follow the instructions that came with the module.

For Honeywell installs it is critical that you follow the Honeywell Installation Guide accessed at:
https://www.myconnect2go.com/dapp/assets/media/guides/C2GEnvisalinkHoneywellInstallationGuide.pdf

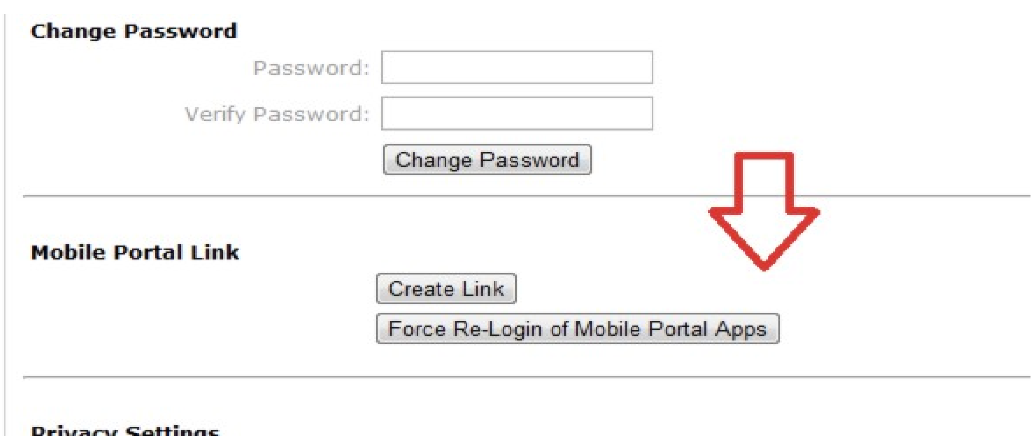
Step 7: Install the Connect2Go App on the Customer's Mobile Device

The Connect2Go Mobile app is available for Android and iOS devices. Verision 10+ of iOS is required. If your customer does not have a supported device, proceed to Step 6 and install the Mobile Portal instead. The Mobile Portal provides most of the same functionality as the Connect2Go app.

Android and iOS Customers

Go to either the Google Play Store or the Apple App Store and search for Connect2Go. The Connect2Go Mobile app will appear and you install it like any other app.

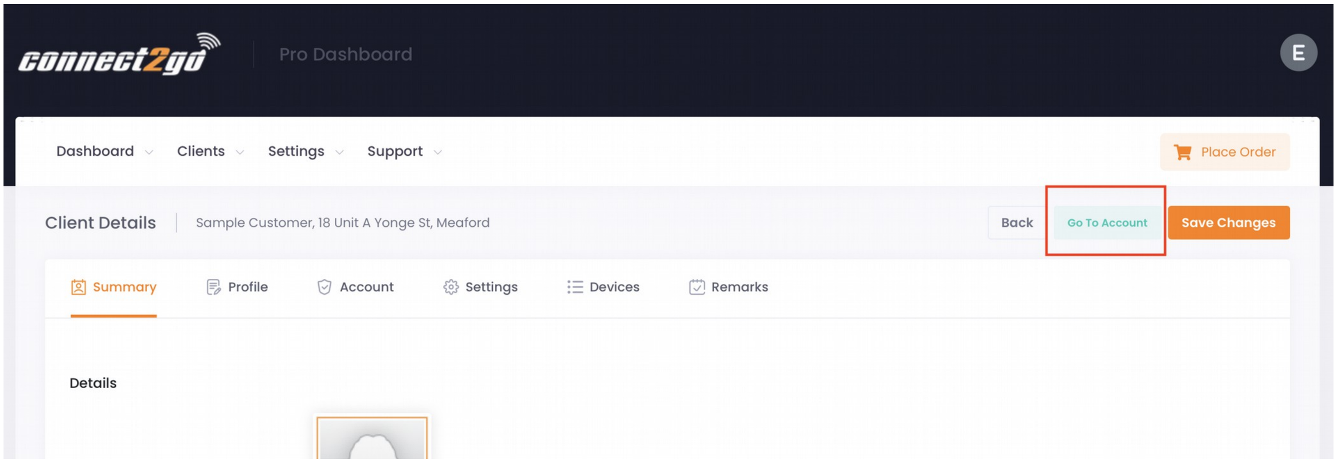
Once installed, open the app and you will be prompted for the customer login credentials (do **not** use your Pro Login credentials). The username and password are the same username and password sent to the customer when you created their account. Once logged in, the app stores a **unique session key** and discards the username and password. Your customer will not have to log-in again until the session key is destroyed. This feature allows the user to disable access to their account remotely in the event the mobile device is lost. You can destroy the session key and force all app users to re-login from the client account page in the Client Portal. See below...



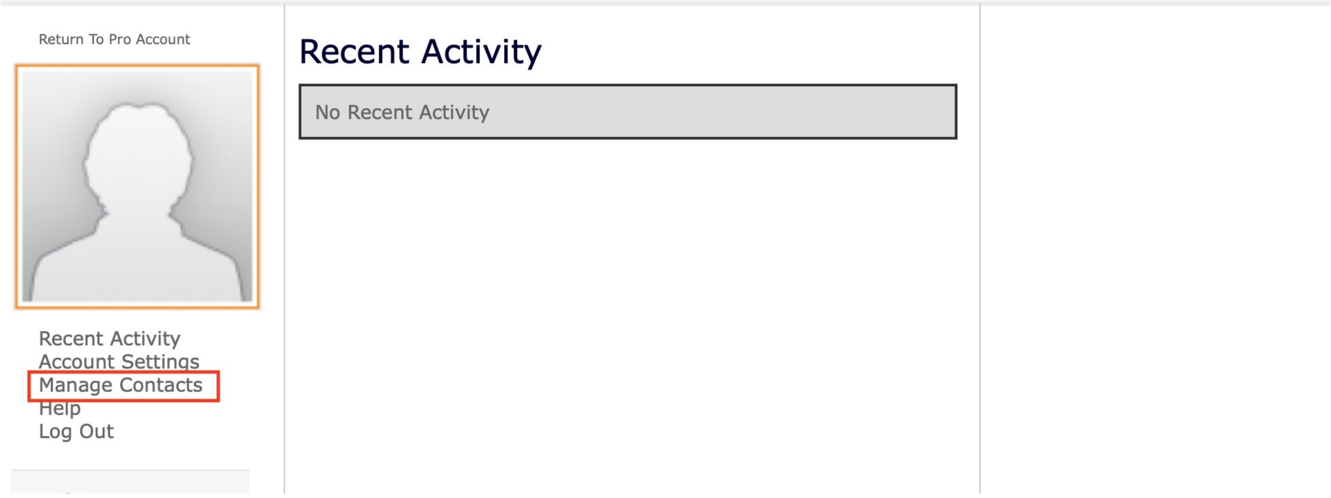
After initial installation, the Connect2Go mobile app will automatically create a new “Contact” in the customer’s account in order to receive Push Notifications directly to the mobile device. For more information on customizing these notifications, please see Step 8 on “Enable Notifications”.

Step 8: Enable Notifications

To do this you will need to jump into your Client's Account on the Client Portal. This can be done from the Client Details page by clicking the **Go To Account** button at the top right.



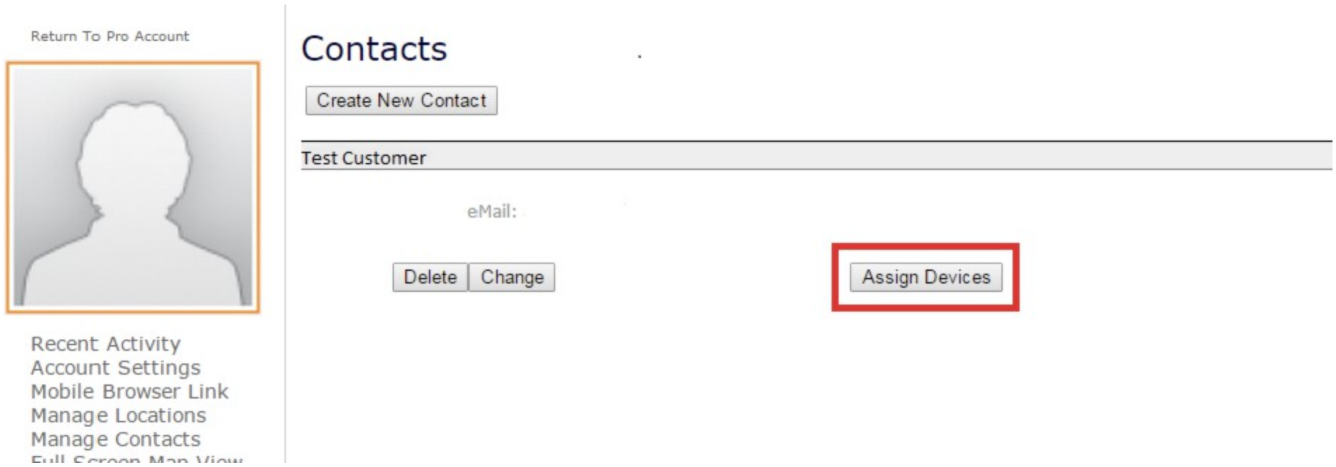
Once you are in the customer’s account you will see the following links in the left-hand column. Click **Manage Contacts**.



Through this option you can enable notification of events to registered contacts. By default the email address you used to create the customer's account will already be in the contact list; however, notifications still need to be enabled. A contact is defined as an email address, an SMS mobile phone number, or a Connect2Go Mobile app (push notifications). A customer may have up to 30 different contacts per account.

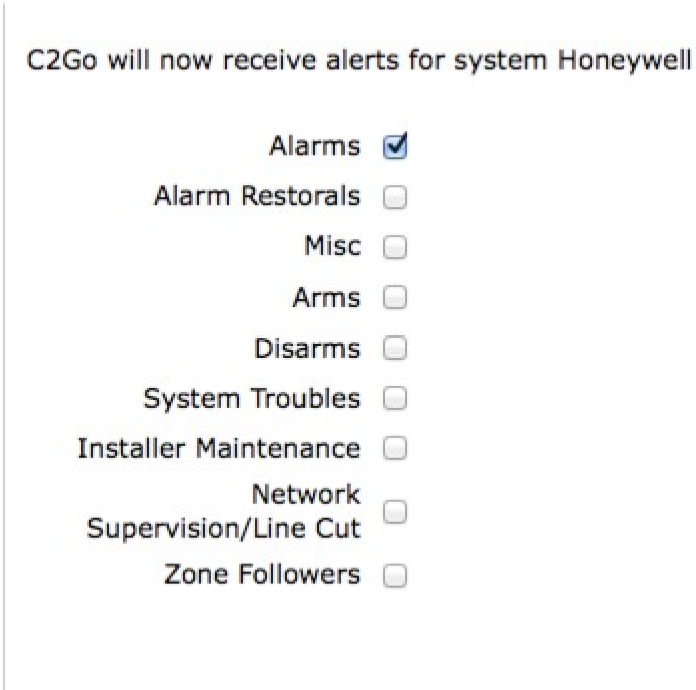
Note: If you added the Connect2Go app in Step 7, you will already see a contact present that represents the mobile device's "push" notification service. It has already been enabled and set to receive notifications for Alarms, Openings, and Closings. You can modify these default options like any other contact as explained later in this step.

To enable notification you need to assign devices to the contact. First click on the contacts name and then click on Assign Devices to display a list of all the devices associated with the account.



Click the Enable button beside the device for which you want to enable notifications for that contact.

The next page allows you to select the alerts that the contact should receive. For example, you may want most event types to go to the customer's email address, but only alarms go to their mobile phone.



Note for Honeywell Systems: Even though you have selected to receive certain event types, you must still program the panel to actually send these event signals. For example, if the customer has selected to receive Arming and Disarming events, nothing will be transmitted to them if you haven't programmed sections *65 and *66 on the panel to actually issue the signal.

You also need to set the message format. Message formats are as follows:

Full

Subject: Security Event: Opening by User Security Event: Opening by User
Location: XXX
Time: 2015-07-01 15:34:56
Partition: 1

SMS Style with Partition

Subject: Security Event:
Opening by User
Location: XXX
Time: 2015-07-01 15:34:56
Partition: 1

SMS Style without Partition

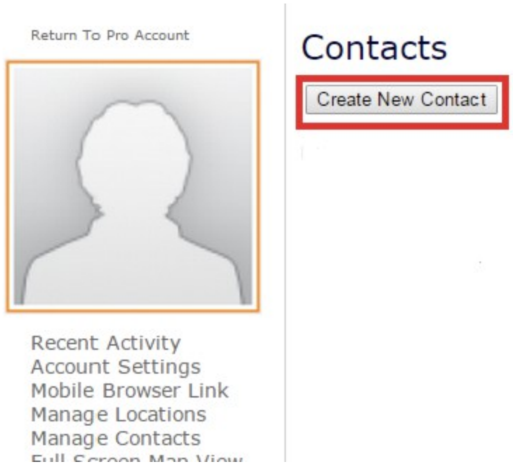
Subject: Security Event:
Opening by User
Location: XXX
Time: 2015-07-01 15:34:56

When finished press **Set Alerts**.

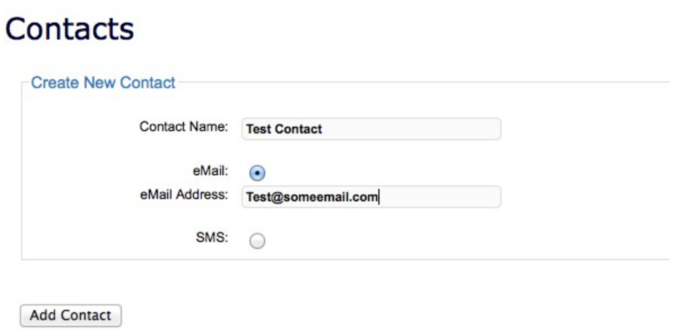
Note: If the contact is to receive notifications from multiple Connect2Go modules, the alert setting process needs to be repeated for each module.

Adding Additional Contacts to Receive Notifications

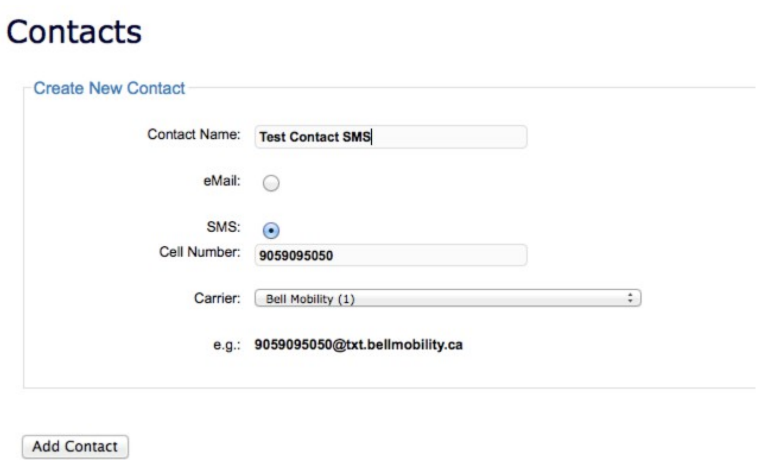
If the customer would like additional contacts to receive notifications, click **Manage Contacts** and then click **Create New Contact**.



You will be presented with the Add Contact form. Enter the Contact Name. Notifications are set to the customer's email address by default. If the contact is to receive email notification, simply enter the email address where indicated.



If the contact is to receive a Text notification, select SMS and you will be presented with a form that allows entry of their 10 digit phone number and the selection of the contact's carrier.



Once finished click **Add Contact**. Once the contact is added it will appear on the Manage Contacts page but will show as **Not Verified**.

If the contact is receiving notification by email, the contact will receive a link by email. The contact must click on the email to verify their email address.

If the contact is receiving notifications by text, the contact will receive a text message with a 6-digit PIN. The customer must log into their Connect2Go account, go to Manage Contacts, select the contact and enter the PIN to verify the contact.

Once the contact is verified you must go through the Assign Devices step for the new contact in order to enable notifications.

ROGERS CUSTOMERS AND SMS NOTIFICATIONS

Rogers charges customers for the relay service used by Connect2Go to provide SMS notifications. Rogers calls this service E-mail to TXT and the customer must be subscribed to this service for the SMS function to work from Connect2Go. There are a series of commands or this service outlined on Roger's website by following this link:

http://www.rogers.com/web/Rogers.portal?_nfpb=true&_pageLabel=GCT&_nfls=true&setLanguage=en&sub_template=email_text_commands&template=wireless-text

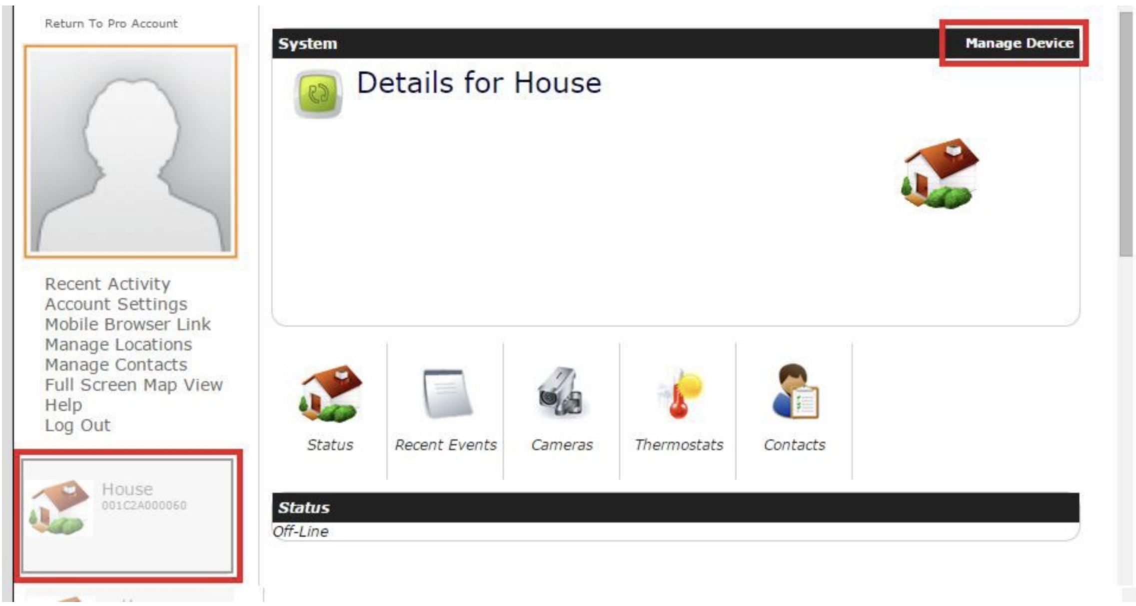
If the customer has the service turned on but is still experiencing difficulties they should add **www.connect2go.com** to the allow list. That is one of the commands under the Administrative Commands at the link above.

Step 9: Customizing Devices with Manage Device Options

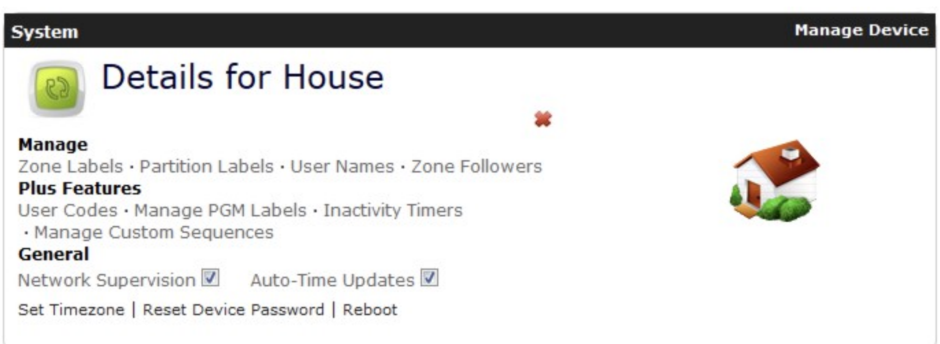
For all devices, you are able to customize zone names, partition names, as well as user names for the customer.

While still in the customer's account click on the image of their device in the left hand column. The details for their device will now show in the right hand column. The buttons along the bottom provide status on the device, recent event, camera status, thermostat status and the list of contacts to receive alarms.

Click on **Manage Device**.



You will be presented with a series of links for customization options on this page. To customize any of the options, simply click the option and make the appropriate changes. To keep your security time updated and accurate with network time, check the **Auto-Time Updates** option. Auto-Time Updates are not available on Honeywell platforms.



Zone Labels – A Zone is a sensor (e.g. motion detector, door alarm, fire alarm). This option allows each zone in the system to be assigned a customized name. For example "Zone 1" could be renamed "Front Door", in which case the customer would receive the message "Front Door: Open" versus "Zone 1: Open".

Partition Labels – A partition is a separate, armable area (e.g. detached garage, basement apartment). This option allows each partition in the system to be assigned a customized name. For example "Partition 1" could be renamed "Basement Apartment", in which when a partition is armed, the customer would receive the message "System Arm: Basement Apartment" versus "System Arm: Partition 1".

User Names – This option allows each user in the system to be assigned a customized name. For example "User 1" could be renamed "Mom", in which case when the system is armed by the User , the customer would receive the message "Armed by User Mom" versus "Armed by User 1".

Zone Followers - Zone Followers are a slightly different class of Envisalert events that allow a user to select a zone within their home/business for which the user will receive notifications for all activity associated to that zone regardless of the system state. Examples would include alerts regarding a gun-locker being accessed or a walk-in freezer being accessed in a commercial restaurant, regardless of the system state.

Manage PGM Labels – A PGM label is a programmable output label and only applies to DSC systems. A programmable output provides the ability for the user to automatically control other elements with their security system. For example, a PGM could be installed to automate the opening and closing of a garage door. If a PGM has been installed it can be given a customized label (e.g. Garage Door).
Manage Custom Sequences – A custom sequence is a string of key presses executed all at once. For example, if you wish to by-pass a zone when alarming the system, you could create a custom sequence to do this automatically.

Set Timezone – Many customers have multiple properties in different timezones. If the module is located in a different timezone than what is specified in the user's account settings, you can override the local alerts time here by specifying the timezone that the system is currently in. This only affects the timezone that is reported in the customer's email or SMS alerts. The customer's event log will always show events in the timezone that is specified in the customer's account settings.
Reset Device Password/Reboot – Allows you to reset the local device password and/or reboot the local device. This password is not the Connect2Go Password.

Dealer Support Contact Information:
If you have any questions or concerns, or have trouble activating your account and setting up customers, please email our Help Desk at support@connect2go.com or call 647-503-3406
Note that phone support is only available, Monday-Friday 9am-4pm Eastern Time.

REVISION DATE: 2020-09-18