The following document outlines how to set up new Pro and new Customer accounts. Before you can set up any customers you must have an active Pro Account.

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

Step 1: Set-up a Pro Account

1. Go to the **Connect2Go** home page **www.connect2go.com**.
2. Move the cursor over **Become A Dealer** located in the menu bar at the top of the screen.
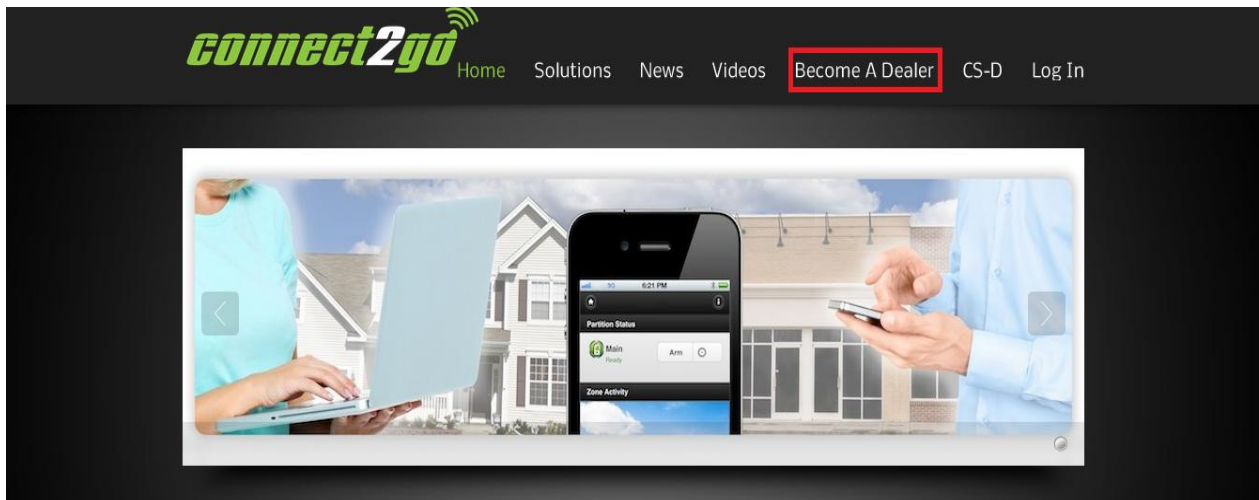
3. Click **Sign Up**. The **Connect2GoPro Program** description and **Information and Pro Account Request Form** should appear.
4. Request a **Pro Account** by filling out the form**.** In the message box type the message "Requesting a new Pro Account".
5. Click **Submit**.
6. Once the request is reviewed by Dealer Relations, you will receive an email with your Pro ID, login credentials and a link to the **Pro Account Enrollment No-Obligation Form**. This form must be signed and sent back to Dealer Relations before your account is fully active.
7. Review, sign, and return the Pro Account Enrollment Form by fax (905-918-0569) or scan the form and email to **dealer_relations@connect2go.com** .
8. Once received, you will receive an email indicating your account is fully active. Now you are able to login and set up a Customer Account.

Step 2: Customize Your Pro Account

From your Pro account, click on the settings tab to view your options.
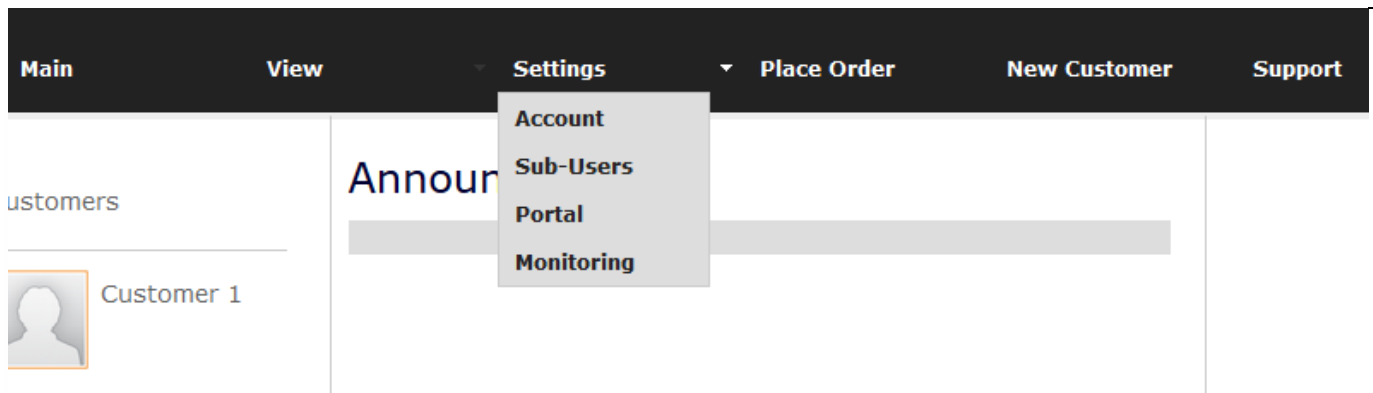
1. **Account Settings:** Most of the options here are self explanatory but the important ones are **email report settings** and **dealer timezone**.

EMAIL REPORT OPTIONS

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.

2. **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 on the sub-user page in the dealer portal.

3. **Portal Settings:** Dealers can customize the Connect2Go portal for their customers from the page. Major options include:

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.

CUSTOMIZATIONS

In this section your can customize the customer/dealer portal with your brand, or just leave it as Connect2Go. There are many options here ranging from simply listing your company name, to presenting a full company banner, replacing the Connect2Go branding.

4. **Monitoring Settings:** 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.

Step 2: Login and Create a New Customer Account

1. Go to the **Connect2Go** home page **www.connect2go.com**.
2. To login to your **Connect2Go Pro Account** move the cursor over **Log In** in the menu bar at the top of the screen.

3. Click **Pro Log In** and enter your credentials that were emailed to you in Step 1.
4. Once logged in, you will be taken to the **Connect2GoPro Main Screen**. Click the **New Customer** link in the top menu bar and enter the Customer's email address as requested. The email address will be the Customer Username.
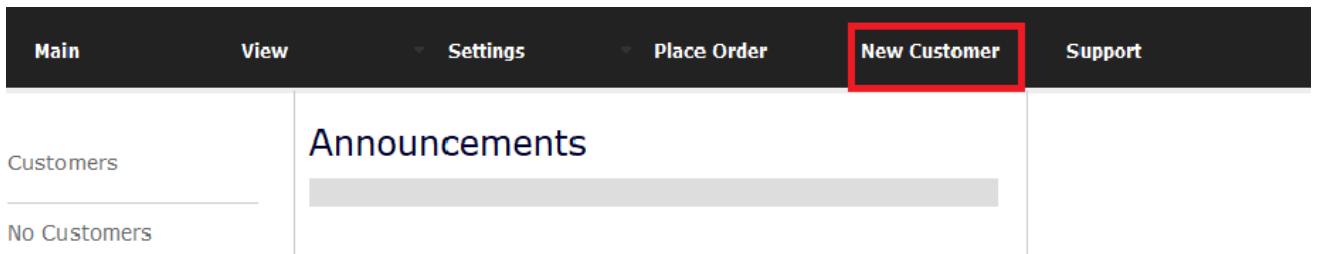

5. Click **Submit Information**.
6. Complete the Customer detail as directed on the website and Click **Next**. The following message should appear:

<div align="center">

Your Customer's Account Has Been Successfully Created.

They have been sent an e-mail with log-in information to the Connect2Go Portal

</div>

7. Verify that the Customer Information is correct. If it is, click **Finish**.

8. Return to the Main Screen by clicking on the **Main** link in the top left hand corner. Your new customer will show up in the left hand column of the screen. As you add more customers they will be displayed in alphabetical order by last name as shown below:
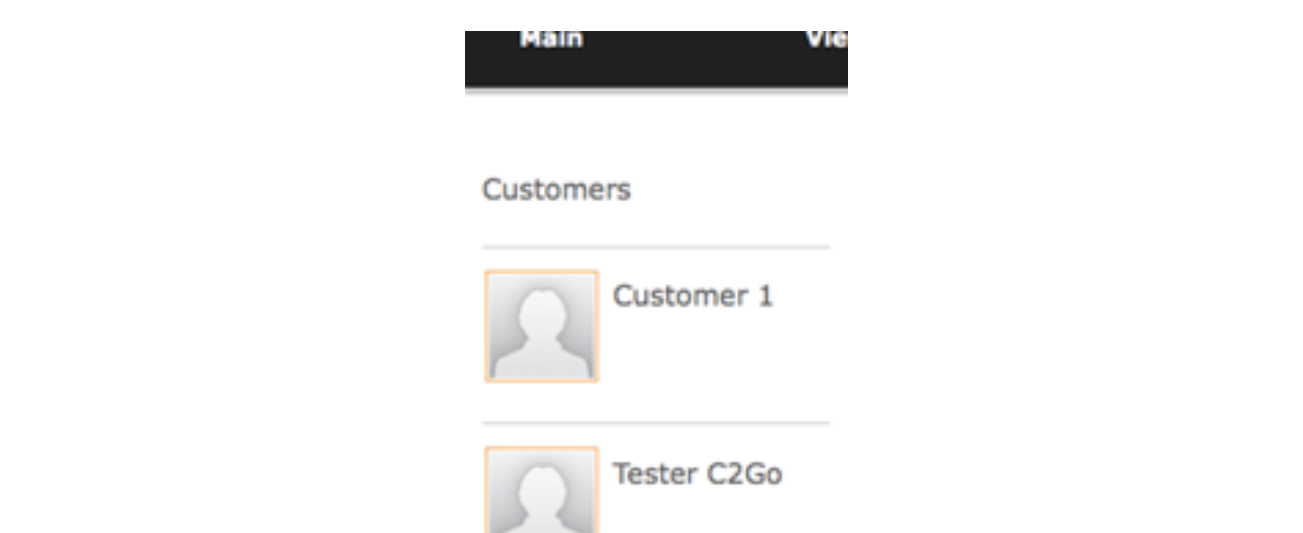
9. Once the customer's account is created, the customer will automatically receive an email with login credentials and instructions on how to login using the email address you entered during account creation. If they do not receive this email, advise them to check their "SPAM" or "Junk" folders.

As shown in the screen capture on the following page:

- To access the customer's account detail and settings click on the **Customer Icon** in the left-hand column on the screen and the customer's details will appear in the right hand panel.
- To change customer details, click the **Change** button and make the appropriate changes and then click Save. The detail will be updated immediately.
- To change Account Settings, Click **Go To Account** located in the top right-hand corner of the screen.

Step 3: Add Device(s) to the Customer Account and Activate

1. At the bottom of the customer's details click on **Add New Device**.

2. Click on **Begin Activation**.
3. Select the device type from the drop down list and click **Next.**
4. Input the Device ID number and give the device a name.

    - If the device is a security module you will need the MAC address. The MAC is a 12 Digit ID number starting with 001C. It consists of HEX digits so only the numbers 0-9 and the letters A-F are valid. The AMC found on the board and also appears on the box.
    - If the device is a SOS device you will need the IMEI which is a 15 Digit ID from the device.

5. Review the Terms and Conditions and check the box indicating you have read and agree to the terms and conditions.
6. Click **Next**. You following message should appear:

Thank you. The new device has been added.
Please allow up to 10 minutes for activation to complete.

Step 4: Physically Install Device(s) At the Customer 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/pro/C2GEnvisalinkHoneywellInstallationGuide.pdf**

Step 5: 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 customer account page. 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 7 on "Enabling Notifications"

Step 6: Create and Send Mobile Portal Link to the Customer, if Required

If your customer's mobile device does not have a native "app", you will need to install the Mobile Portal via a web-app. To provide the mobile portal web-app on the customer's smart phone, you will need to first create the link and then send the link to the customer. Note that sending a mobile portal link does not enable notification. This is done in Step 7.

1. After activating the device(s), return to the Customer Account Settings screen by clicking **Back.**

   > **Note:** If you are not already in the customer's account, click on the icon for the customer for whom you wish to create a mobile portal link.

2. Click **Go to Account** in the top right hand corner of the Customer Account Settings screen.
3. Once you are in the customer's account you will see the following links in the left-hand column. Click **Mobile Browser Link**.

Return To Pro Account

Recent Activity

No Recent Activity

Recent Activity
Account Settings
Mobile Browser Link
Manage Locations
Manage Contacts
Full Screen Map
View
Help
Log Out

4. Once expanded, the option **Generate Mobile Portal Link** will appear in the right-hand panel. Click **Create New Link**.
5. Click **Finished**.
6. If the customer wishes to use their default account address, simply click **Email Link**. If the customer wishes to use an alternative address enter the address and then click **Email Link**.
7. Click **Finished**.

> **Note:** Only one link can be active at a time. If the customer wants someone else to have mobile access to his/ her account, the customer should forward the current link to them (e.g. everyone must share the current active link).

8. Once received, the customer should open the email on their phone and click on the link to get the mobile portal to open in their browser. The mobile portal should look like this:
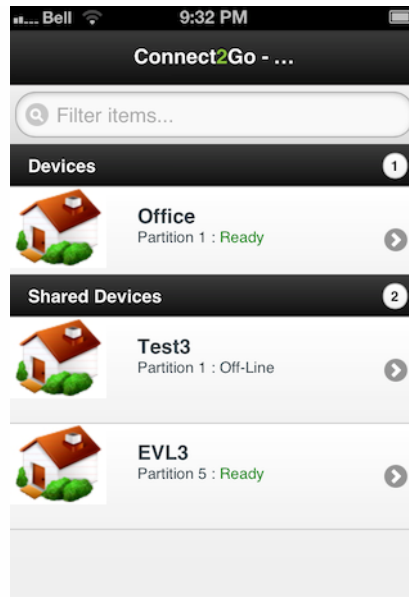
9. To get the **Mobile Portal Link** to appear as an icon like any other App on the customer's phone, the customer needs to bookmark the mobile portal to the home screen. The process to create a bookmark for IPhone and Android is outlined on the following pages. For other device types, follow the appropriate procedure to add an icon to the home screen as per the device manufacturer.

iPhone Customers

1. Click the **Share** button located in the middle at the bottom of the screen as shown in the left-hand image. Then click **Add to Home Screen** located in the middle of the next screen as shown in the right-hand image.

2. The **Add to Home** screen should appear and the bookmark can be renamed. Once the bookmark is named,

click Add located in the top right-hand corner of the screen.
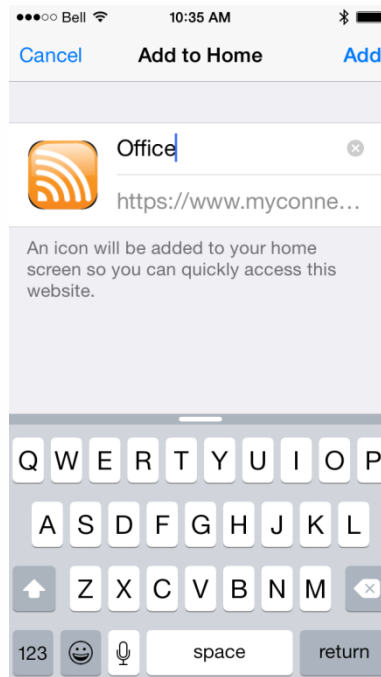
Step 7: Enable Notifications

1. From your Pro Account, click on the customer icon for which you want to enable notifications. This will take you to the **Customer Account Settings** screen. Next select **Go to Account** on the upper right-hand corner of the page.

2. Click on **Manage Contacts** located in the left-hand column. 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 5, 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.
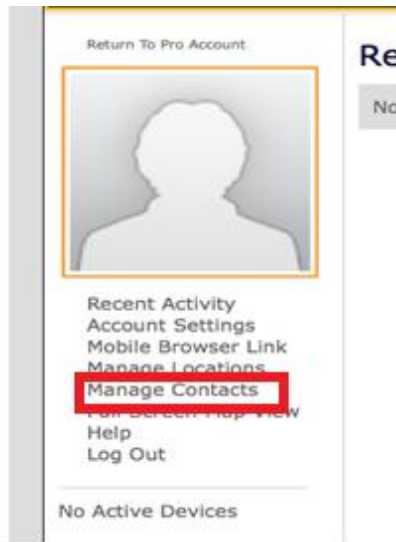
3. To enable notification you need to assign devices to the contact. First click on the contacts name and then click on **Assign Devices** to display a list of all the devices associated with the account.
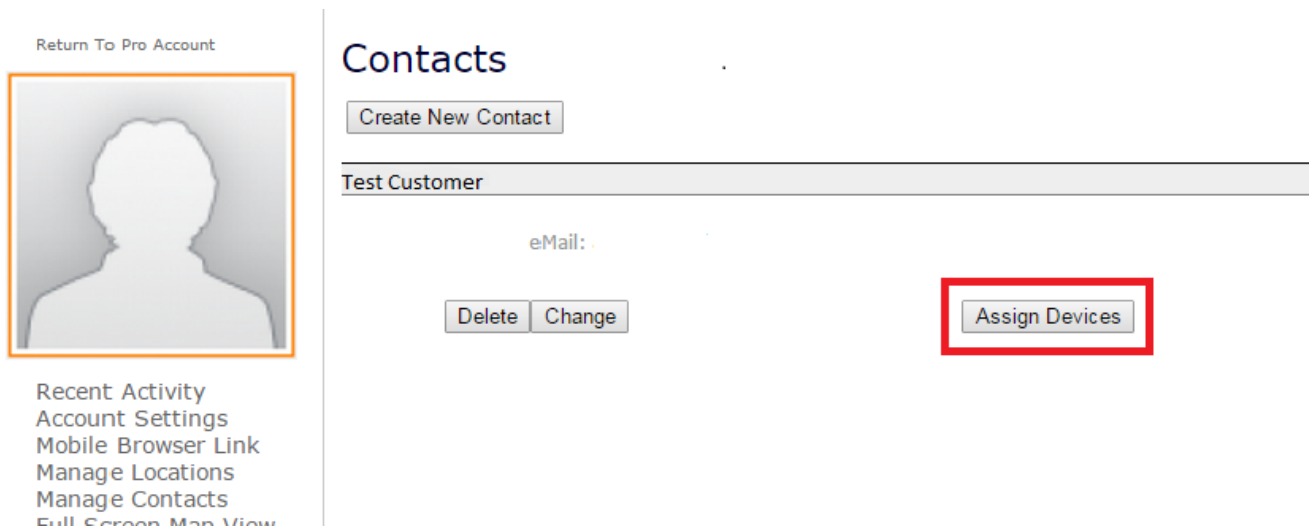
4. Click the **Enable** button beside the device for which you want to enable notifications for that contact.

5. 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.

C2Go will now receive alerts for system Honeywell

Alarms ☑
Alarm Restorals ☐
Misc ☐
Arms ☐
Disarms ☐
System Troubles ☐
Installer Maintenance ☐
Network Supervision/Line Cut ☐
Zone Followers ☐

> **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.

6. You also need to set 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

7. Click **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

1. If the customer would like additional contacts to receive notifications, click **Manage Contacts**.
2. Click **Create New Contact**.
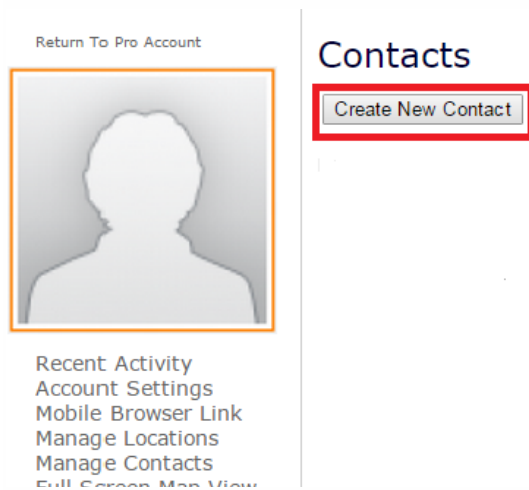
3. Enter the **Contact Name.** Notifications are set to the customer's email address by default. If the contact is to receive email notification, simply enter the email address where indicated.

Contacts

Create New Contact

Contact Name: **Test Contact**

eMail: ⦿
eMail Address: **Test@someemail.com**

SMS: ○

[Add Contact]

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.

Contacts

Create New Contact

Contact Name: **Test Contact SMS**

eMail: ○

SMS: ⦿
Cell Number: **9059095050**

Carrier: [Bell Mobility (1) ⇕]

e.g.: **9059095050@txt.bellmobility.ca**

[Add Contact]

4. Once done click **Add Contact**.

Contacts

Create New Contact

Contact Name: **Test Contact**

eMail: ⦿
eMail Address: **Test@someemail.com**

SMS: ○

[Add Contact]

5. Once the contact is added it will appear on the **Manage Contacts** page but will show as **Not Verified**.

6. If the contact is receiving notification by email, the customer will receive a link by email. The contact must click on the email to verify their email address.
7. 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.
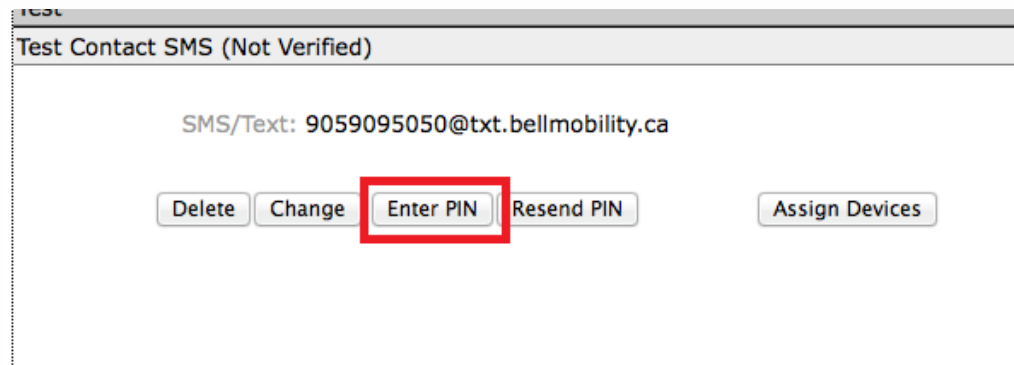
8. Once the contact is verified you must go through the **Assign Devices** step for the new contact in order to enable notifications.

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 for 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 8: 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.

1. 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.
2. Click on **Manage Device.**
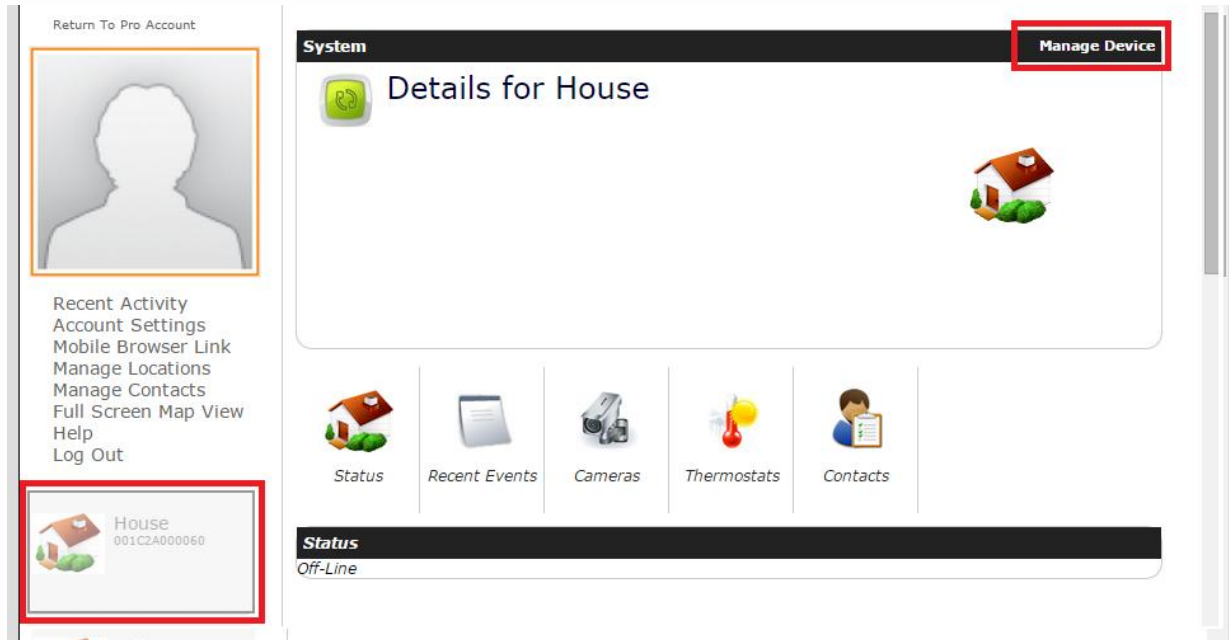
3. You will be presented with a series of links for customization options on this page. To customize any of the options, simply click the option and make the appropriate changes. To keep your security time updated and accurate with network time, check the **Auto-Time Updates** option. *Auto-Time Updates are not available on Honeywell platforms.*
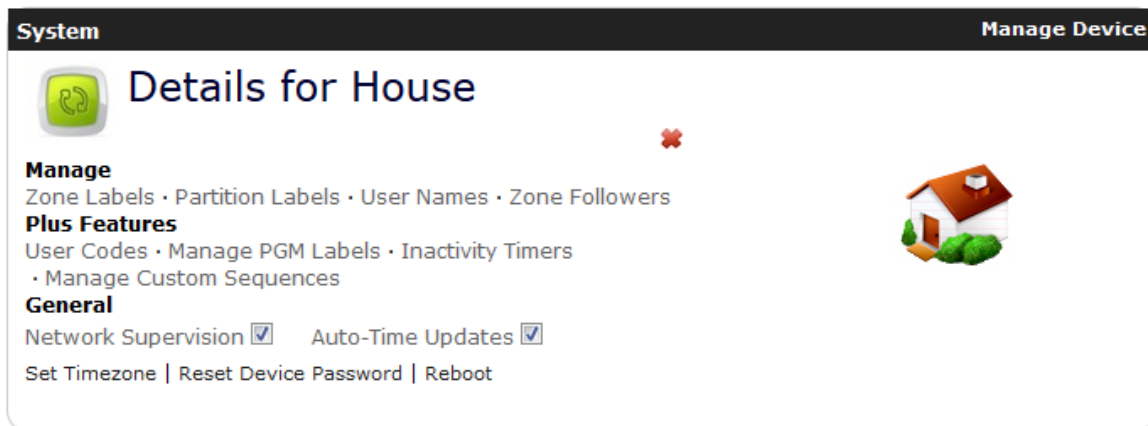
Zone Labels – A Zone is a sensor (e.g. motion detector, door alarm, fire alarm). This option allows each zone in the system to be assigned a customized name. For example "Zone 1" could be renamed "Front Door", in which case the customer would receive the message "Front Door: Open" versus "Zone 1: Open".

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: 2017-08-22