

USER GUIDE




Welcome



 **Accounts Receivable**


1-30 days:	\$160.00
31-60 days:	\$80.00
61-90 days:	\$80.00
91-120 days:	\$0.00
120+ days:	\$0.00

 **Account on Test**

Customer #

Name


FIND ACCOUNT

 **Monitoring Cert**

Customer #

Name


FIND ACCOUNT

 **Permits**

Customer #


Name

FIND ACCOUNT

 **Support Tickets**

There are no support tickets needing responses. To view support tickets, [click here](#).

NEW TICKET

 **Answering Service (Beta)**

There are no active message at this time. To view messages, [click here](#).

 **DynaLink**

LINK

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Accessing InSite

To access InSite go to www.dynamarkmonitoring.com and click Secure Dealer Login or save the URL

<https://insite.dynamarkmonitoring.com/Account/Login>

USERS

User Creation

All new user accounts are first created in Dynalink. The first user created is normally the primary account holder or administrator. This person will have the most access credentials and will be able to set the permission of all future users. They will be assigned the Dealer Owner Role.

Managing User Roles

Once new users are created in Dynalink their credentials will allow them access to InSite. The first time they log in to Insite they will be assigned the Dealer Technician role. This role has very few permissions. It is up to the person in charge at your company to decide what role and level of permissions is appropriate for the new user.

There are several default roles preconfigured in InSite for ease of activating new users. In addition to the default roles you can also add or remove individual permissions from a user to customize roles to meet your specific needs.

To access and edit user roles:

- Resources
- User Admin
- Enter the name of the user and select search or just leave blank and all users will be shown.
- Click on the User name
- From here you can change roles, information, and individual permissions.

Default Permissions by Role

When adding or editing a user first start by assigning the role most appropriate based on the permission level. If you wish to provide more or less access you can simply check or uncheck the access level from the user screen. Below is a chart outlining the default permission provided when assigning a user a role.

FEATURE	Dealer Owner	Dealer Admin	Dealer Service	Dealer Test Only
Accounts Receivable	X	X		
Add/Edit User Information	X	X		
Adding Service Tickets	X	X	X	
Answering Service	X	X	X	
Edit Service Ticket Comments	X	X	X	
Monitoring Certificates	X	X		X
My Settings	X			
Notifications	X	X		
On/Off Test	X	X	X	
Permits	X	X		
Reports	X			
Search Service Tickets	X	X	X	
Support Tickets	X	X		

My Settings-Dealer Settings

General Setup

Each dealer is provided an areas within InSite to customize settings and upload information. Examples include.

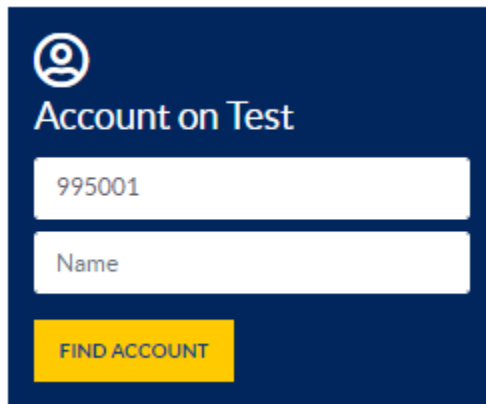
- Answering Service Defaults
- Emergency On Call List
- Logo Uploading

NEEDS WORK

Tools and Widgets

Account on Test

From the home screen you can quickly lookup an account you wish to place on test.



You will be presented with the customer result matching your entry, or if there are multiple options you can selected the correct customer from the list. You can also quickly see the customer status and the activation date.

Customer	No.	Site Address ▼	Action	Status
Airplane!	995001	767 Landplane Dr Hagerstown,	ON/OFF TEST	Active - 04/15/2020

Once you select On/Off test you will be taken to a screen where you can place the account on test (or stop the test) for a period of 1-24 hours. The activity log is also available for technicians and other users to verify activity and signals if they are servicing the account.

On Test - #995001

Dashboard > On Test

Account Information

Customer Airplane!
 Customer # 995001
 Address 767 Landaplane Dr Hagerstown, MD 21740 Hagerstown, Maryland 21740

PLACE ON TEST for

ACTIVITY LOG

REFRESH

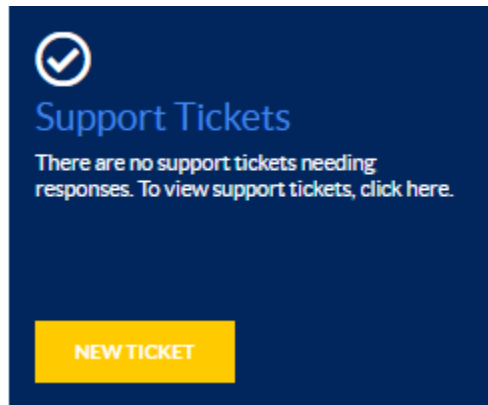
LogDate	Code	Event	Text
02/11/2021 1:17:10 PM			Temp On Test - Deleted ID: 1255433 - 13:17 to 14:17, 11 Feb - Whole Customer Reason: 'Dealer Support Portal'
02/11/2021 1:17:06 PM			Temp On Test - Started ID: 1255433 - 13:17 to 14:17, 11 Feb - Whole Customer Reason: 'Dealer Support Portal'
02/11/2021 1:17:06 PM			Temp On Test - Entered ID: 1255433 - 13:17 to 14:17, 11 Feb - Whole Customer Reason: 'Dealer Support Portal'
02/11/2021 1:17:02 PM			Temp On Test - Stopped ID: 1255432 - 13:16 to 14:16, 11 Feb - Whole Customer Reason: 'Dealer Support Portal'
02/11/2021 1:17:02 PM			Temp On Test - Deleted ID: 1255432 - 13:16 to 14:16, 11 Feb - Whole Customer Reason: 'Dealer Support Portal'
02/11/2021 1:16:56 PM			Temp On Test - Started ID: 1255432 - 13:16 to 14:16, 11 Feb - Whole Customer Reason: 'Dealer Support Portal'

Support Tickets

Dynamark now tracks all requests for changes to customer accounts and requests made through dealer support. This new system helps organize and track all requests in a much more comprehensive manner. You may notice the first time you enter InSite that you already have tickets completed and underway. Our team has been using the system internally for several months already. Support tickets can be created by the dealer or by Dynamark. Currently Dynamark still supports emailed requests, but all tickets will be entered into and responded to through InSite. The Support Ticket system has several key features to highlight.

New Ticket Creation

- New tickets are created by selecting New Ticket from the home page.



- Select a reason for the ticket
- Enter the customer number if it is related to a customer account
 - If there is an account on file it will auto fill the customer name.
- Enter the customer name
- Attach any documents
- Type your message
- Click create

New Support Ticket

[Dashboard](#) > [Support Tickets](#) > [New Ticket](#)

If the issue is related to a customer account, please provide the customer number

 NO FILE CHOSEN

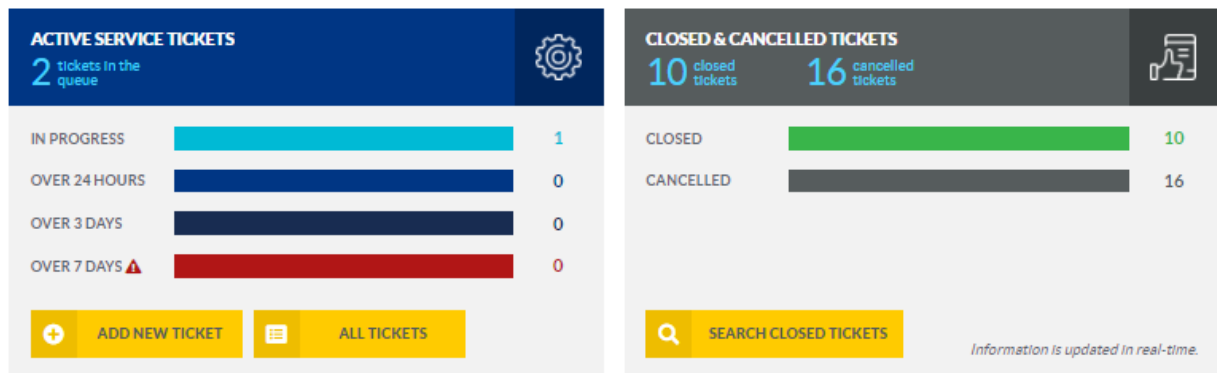
DESCRIPTION

Ticket Dashboard

InSite makes it easy for you and your team to stay up to speed on the status of all of your requests. On the home screen simply click on Support Tickets to access the dashboard.

Support Ticket Dashboard

Support Tickets > Dashboard



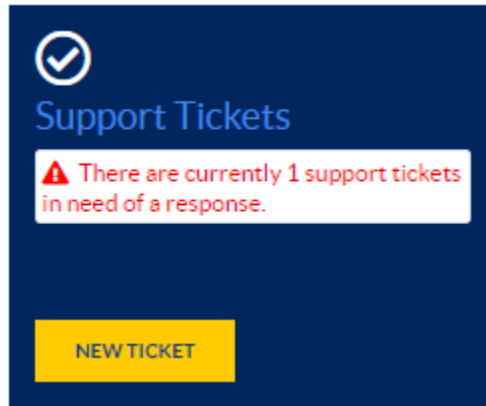
Ticket Queue and History

- To see all tickets are to search for tickets simply click on All Tickets.
- You can view all open tickets or change the search criteria to display tickets based on your search needs. Holding down the Ctrl button allows you to select multiple criteria.

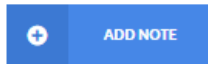
Ticket	Status	Customer Name	Acct #	Reason	Created On	Created By
37037	In Progress	Thomas "Neo" Anderson	995002	Edit	2/11/2021 2:19:37 PM	Dealer Demo (Owner Role)
37036	Needs Response	Sasha Fierce	995019	Activation	2/11/2021 2:18:47 PM	Dealer Demo (Owner Role)
32942	Completed	DMI Test Board-XT	010015	Edit	12/31/2020 7:50:27 AM	Matt Romine
30145	Completed			Activation	12/1/2020 3:21:33 PM	Dealer Demo (Owner Role)
30141	Completed	Clark Kent		Edit	11/23/2020 2:26:43 PM	Dealer Demo (Owner Role)
30137	Completed	Diana Prince		Edit	11/18/2020 10:28:04 AM	Dealer Demo (Owner Role)
30131	Completed			Cancel	11/12/2020 10:12:16 AM	Dealer Demo (Owner Role)

Responding To Ticket Messages

At times our Dealer Support team may have questions or require more information to fulfill your request. When this instance arises, they can add a note to the ticket and change the status to Response Required. When this occurs you will see the home page widget will notify you and the ticket status will change. Please enter the ticket and respond to the message provided using the note function.



HISTORY



Event / Note	User	Date & Time
Created (New)	Dealer Demo (Owner Role)	02/11/21 02:18:PM
Initial View (In Progress)	Trey Alter	02/11/21 02:20:PM
We are missing the required permit. Response Required	Trey Alter	02/11/21 02:21:PM
Response Required (Needs Response)	Trey Alter	02/11/21 02:21:PM

Ticket Notifications

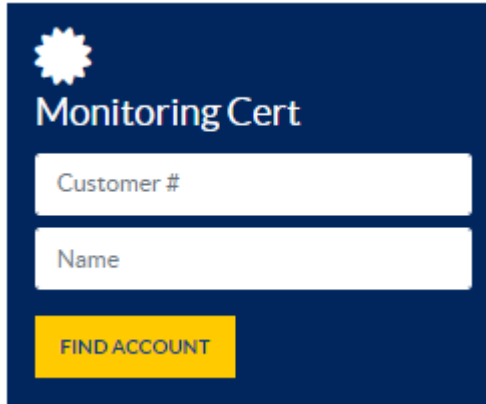
As Dynamark transitions to the new ticketing system we will continue to support ticket creation through email for a period of time, but we expect to end support for emailed responses to tickets much earlier. There are multiple ways to stay up to date on communications requiring your attention and changes in ticket status.

- 1) Ticket Queue (Easiest)
 - a. The easiest method is to login to the ticket queue or leave the browser open. The queue will update in real time as the status changes.
- 2) Notification Emails
 - a. You can also request an email when a response is required or when a ticket is complete.

Monitoring Certificates

InSite allows dealers to generate their own professional looking monitoring certificates on the fly. InSite makes the process easy by pulling the customer information and pre populating the certificate. To get started:

- Enter the customer number on the Monitoring Certificate widget on the home screen.

A dark blue rectangular widget titled "Monitoring Cert" with a white sunburst icon in the top left. It contains two white input fields: "Customer #" and "Name". Below the fields is a yellow button with the text "FIND ACCOUNT" in black.

- Confirm the customer result returned is correct or select from the list if multiple entries are returned and click Generate.

Customer	No.	Site Address ▼	Certificate	Status
Roxxi & Pinot Noir	995008	2007 Lush Lane Germantown,	GENERATE	Active - 04/16/2020

- Fill out the information unique to the customer's system.
 - Typing in a name in the Company Rep field will populate the name on the PDF. To leave this line blank for signature simply leave the box blank.

Monitoring Certificate

Dashboard > Certificate

Roxxi & Pinot Noir

2007 Lush Lane Germantown, MD 20876 Germantown, Maryland 20876

MONITORING

- Burglary
- Fire
- Water
- Carbon
- Panic

TRANSMISSION

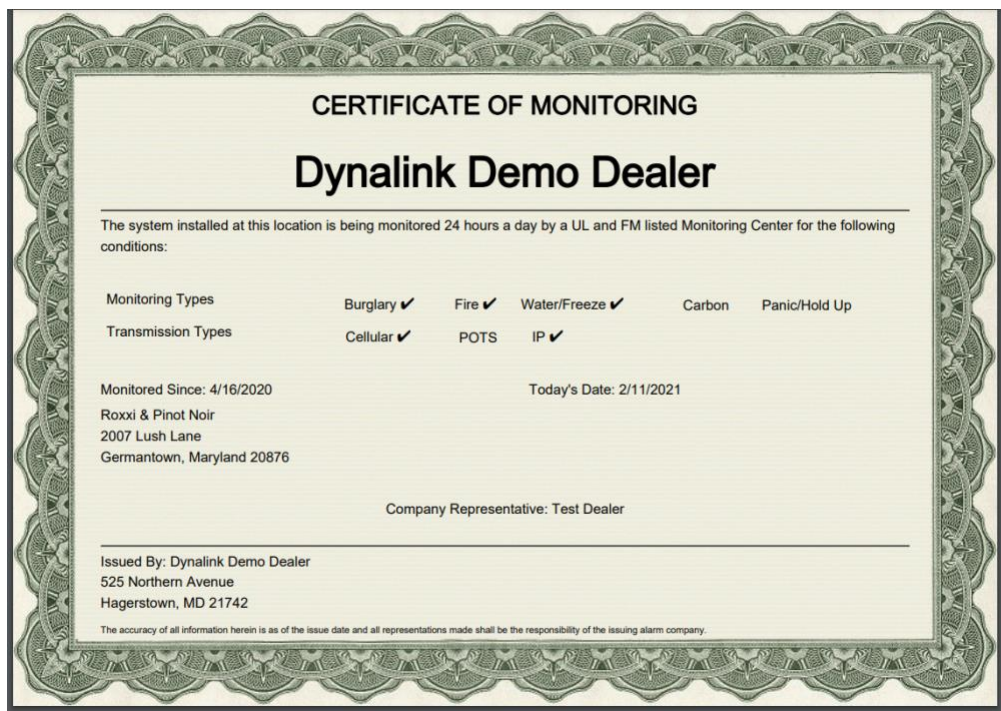
- Cellular
- POTS
- IP

COMPANY REP

- I certify that the above services are currently being monitored.

CREATE CERTIFICATE

- When you click create a new window will open in your browser with the completed form. You can print, download, or email the form.



- Logo
 - If your logo has been uploaded into the My Settings area of your dealer account it will be displayed here. For help or assistance on sizing your logo please contact us.

Permit Management

While the need to manage permits varies by area we recognize the growing need to provide tools to assist our dealers in tracking and managing them.

- Enter the customer number in the Permit Widget to search for the customer account.

- Confirm the customer result returned is correct or select from the list if multiple entries are returned and click Generate.

Customer	No.	Site Address	Permit	Status
Airplane!	995001	767 Landaplane Dr Hagerstown,	UPDATE	Active - 04/15/2020

- View the current permit information or enter updated information and click Update Permit

Edit Permit: 995001

[Dashboard](#) > [Permit](#)

Airplane!

767 Landaplane Dr Hagerstown, MD 21740 Hagerstown, Maryland 21740

987654

04/26/2021

Police

[UPDATE PERMIT](#)

Answering Service

Answering service is defined as all NON-EMERGENCY calls. If a customer is calling in after hours for emergency technician dispatching then we would consider it an emergency service call. Both types will have a message created in InSite but emergency on call dispatching is included as a service to dealers at no additional charge.

When a customer requests we provide a message to the dealer after hours we will ask the questions listed in the form below.

Create Message

[Home](#) > [Answering Service](#) > [Create](#)

Can I get your full name?

What's the best number to reach you?

May I have your address or account number?

Message Type

What message can I take for you? (100 character max)

Is this an emergency?

After the message is saved it can be emailed to the address on file or it will be visible to users with this permission level upon logging in to InSite. A list of messages will be kept visible until archived by the dealer. An example of the message queue is provided below.

Full Name	Emergency?	Call #	Phone	Account/Address	Created On
Test Customer	No	1	(720) 555-1212	123 Main St	1/20/2021 3:08:50 PM
Test Customer	No	2	(720) 555-1212	123 Main St	1/21/2021 6:56:54 AM
Cindy Testhill	Yes	3	(720) 833-1387	123 Main St	1/21/2021 7:22:24 AM
Derrick Testmond	No	4	(720) 555-2121	321 Pine St Testville, MD 21742	1/21/2021 7:45:57 AM

Emergency On Call List Management

Dispatchers will now handle all after hours emergency calls through the InSite system. When requested the dispatcher will initiate an answering service message which will provide them with the On Call schedule and instructions.

Dealers now have the ability to manage everything related to emergency call management right from their computer. Dealers can:

- Create multiple on call lists.
- Activate or deactivate a list
- Add, delete, and reorder the contacts on a call list.

Dispatchers will call through the active call list you have selected with the instructions you have saved. In addition to calling the list in order we also have the ability to text the message to one or all of the contacts.

- Creating an Emergency On Call List
 - Navigate to Resources---Answering Service
 - Create New and type in a name for the list
 - Name the List and Save
 - Click New Contact or Add a Saved Contact
 - New contacts can be created on the fly and do not require the individual to be an InSite user.
 - Once you have completed adding contacts save the list.
 - You can also reorder contacts, add news contacts, and delete contacts.

Week 2 Contact List

[Home](#) > [Answering Service](#) > [Contact Lists](#) > [Contact List](#)

Week 2

SAVE

Name	Email	Mobile	Adjust Order	Remove
Dave Matthews	dave@dmb.com	301-555-1212	⬆️ ⬆️	✖️
Albert Hayes	abhayes@fakemail.com	301-555-1255	⬆️ ⬆️	✖️
Other Contact	contact@aspenroot.net	7205552121	⬆️ ⬆️	✖️

NEW CONTACT

- Activating A Call List
 - If you have more than one list you must select one to be active.
 - Go to Resources----Answering Service
 - Select the list you wish to be active and save.

End of current revision.