Empower Access, Elevate Security

Cielo365.com

User Manual

Cielo365 Dealer

1600 Union Hill Road Alpharetta, GA 30005

(862) 505-2101

infocielo@cielo365.com

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About the Manual

This manual provides step-by-step instructions for operating **Cielo365 Dealer**.

All images displayed are for illustration purposes only and may not exactly represent the actual products.

Table of Contents

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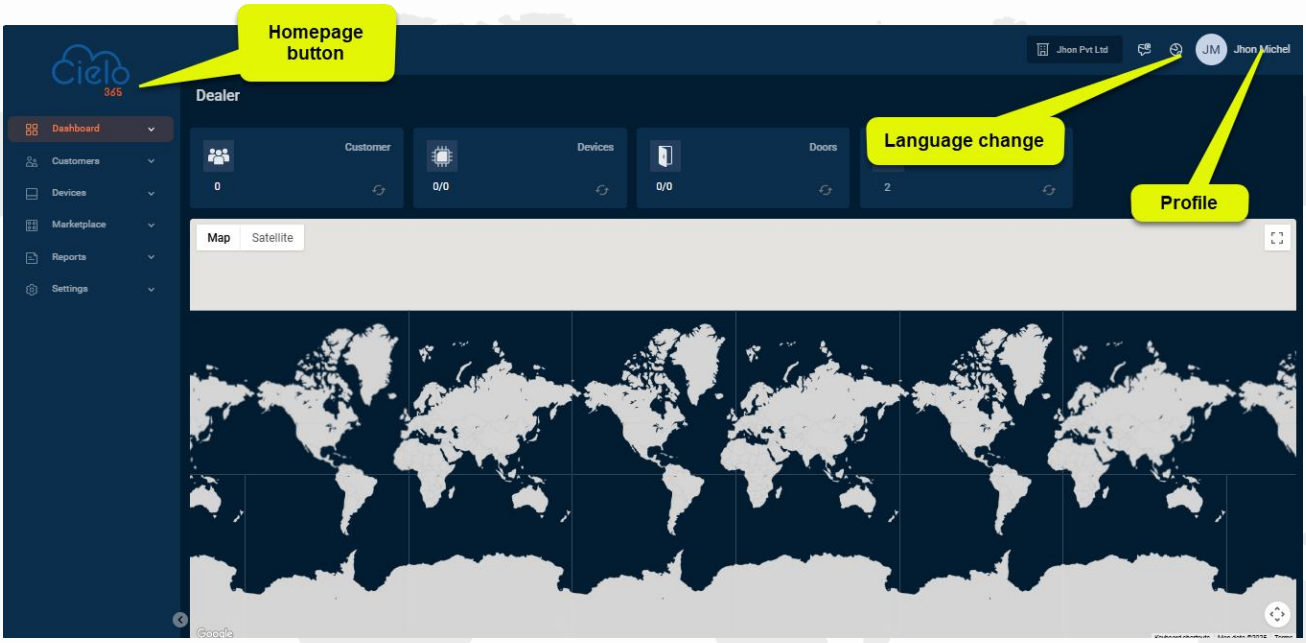
1. Dealer Login

1.1 Dashboard

The dashboard will provide information on the customer's devices, doors, number of customers, sites, and number of alarms triggered.



Profile: Users can view and edit their current account profile.

Sign Out: Users have the option to sign out of the application.

Switch Companies: The user can switch to the membership associated with this email.

Theme: Theme modes that switch between dark and light colour schemes to enhance readability and comfort based on user preference and lighting conditions.

Select Language: The Select Language feature allows users to change the display language of the Cielo 365 application interface.

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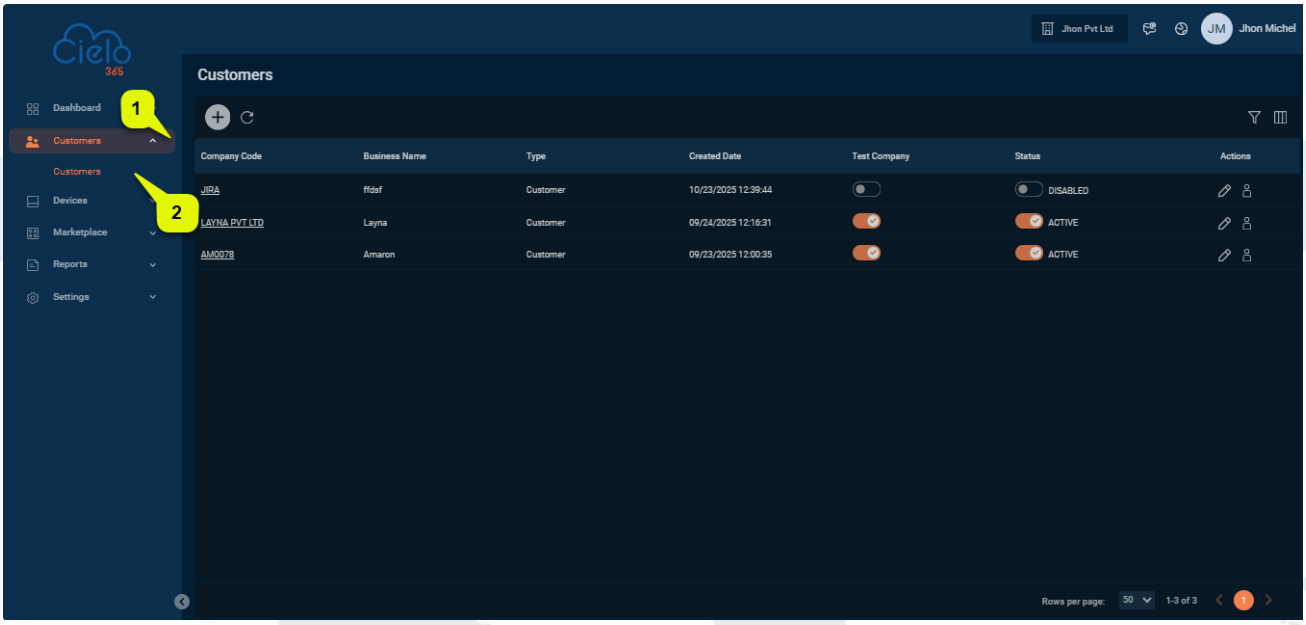
1.2 Customer

1.2.1 Customers

This list page displays the customers created by the dealer. Each customer's details are provided in list pages.



A brief note about the columns displayed:

Company Code: Displays the customer's company code.

Business Name: Displays the name of the business.

Type: Displays the customer type.

Created Date: Displays the date the customer was created.

Status: Displays the subscription that has been applied to the customer.

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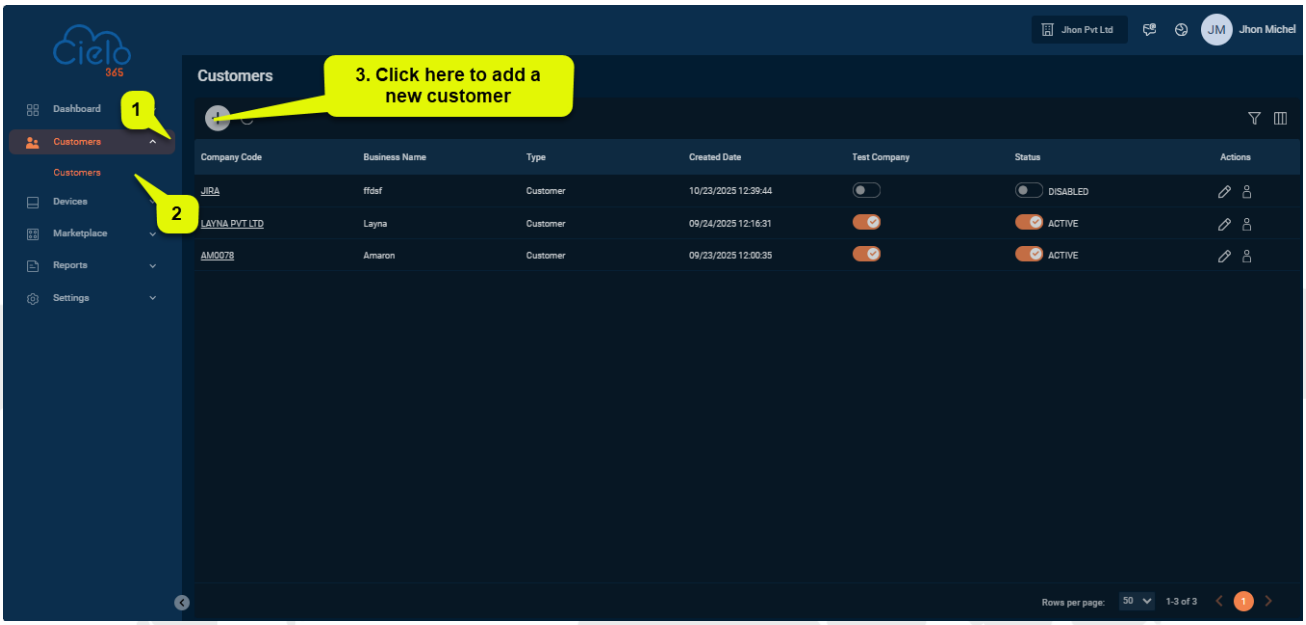
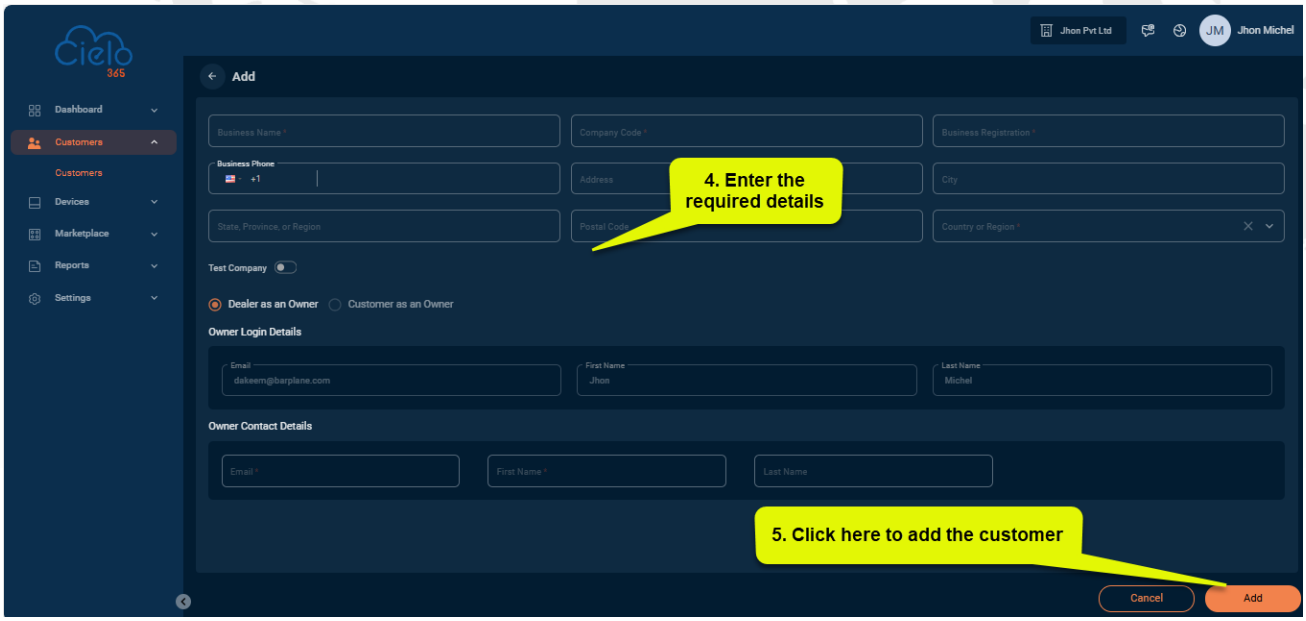
Adding a New Customer

The Add function will let the user create a new Customer in the application.





Create a customer, follow the steps below:

1. On the Customers interface, click Add to create a new Customer.
2. On the Add Interface, enter the required customer details.
3. After entering the details and clicking on the checkbox for the Customer as an owner, click add to save and update the newly created Customer.

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Note: By default, the dealer will be the owner of the customer account. If the **Customer as an Owner** checkbox is selected, the owner will be a customer.

The field descriptions are as follows:

Business Name: Enter the name of the business.

Company Code: Enter the company code.

Business Registration: Enter the customer's business registration number.

Business Phone: Provide the business contact number.

Business Address: Enter the business's address.

Zip Code: Enter the zip code.

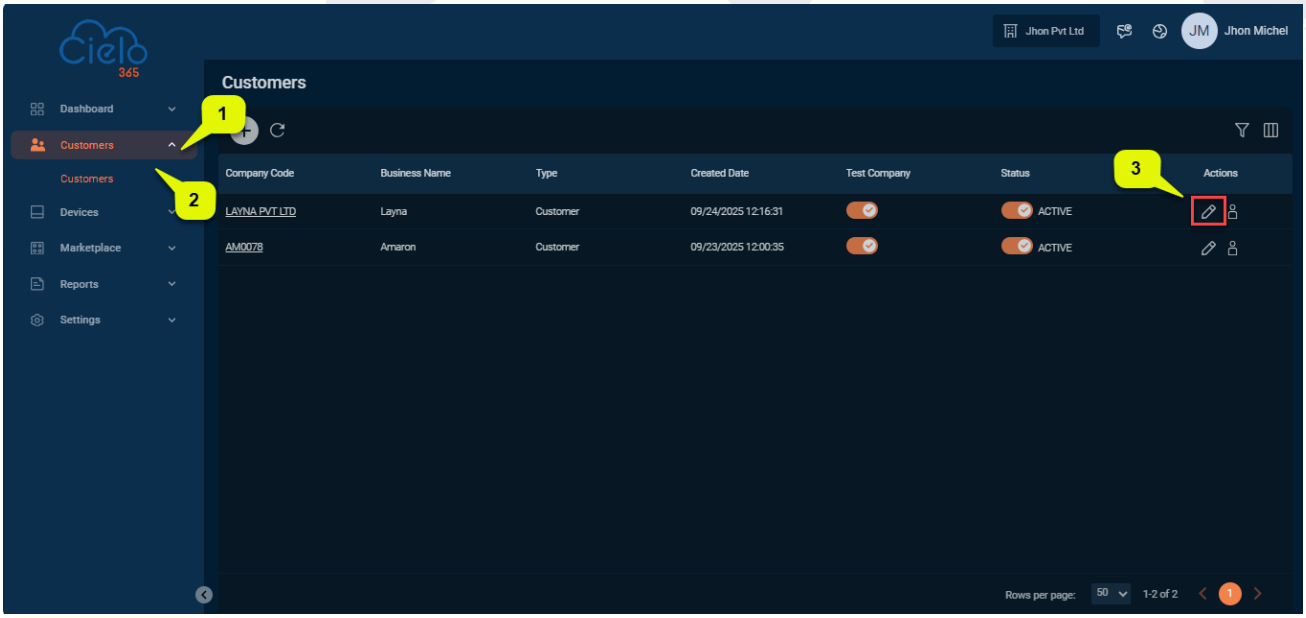
Owner's First Name: Enter the customer's first name.

Owner's Last Name: Enter the customer's last name.

Owner's Email: Enter the customer's email address.

Editing a Customer

The Edit function enables users to modify the existing customer details in the application.



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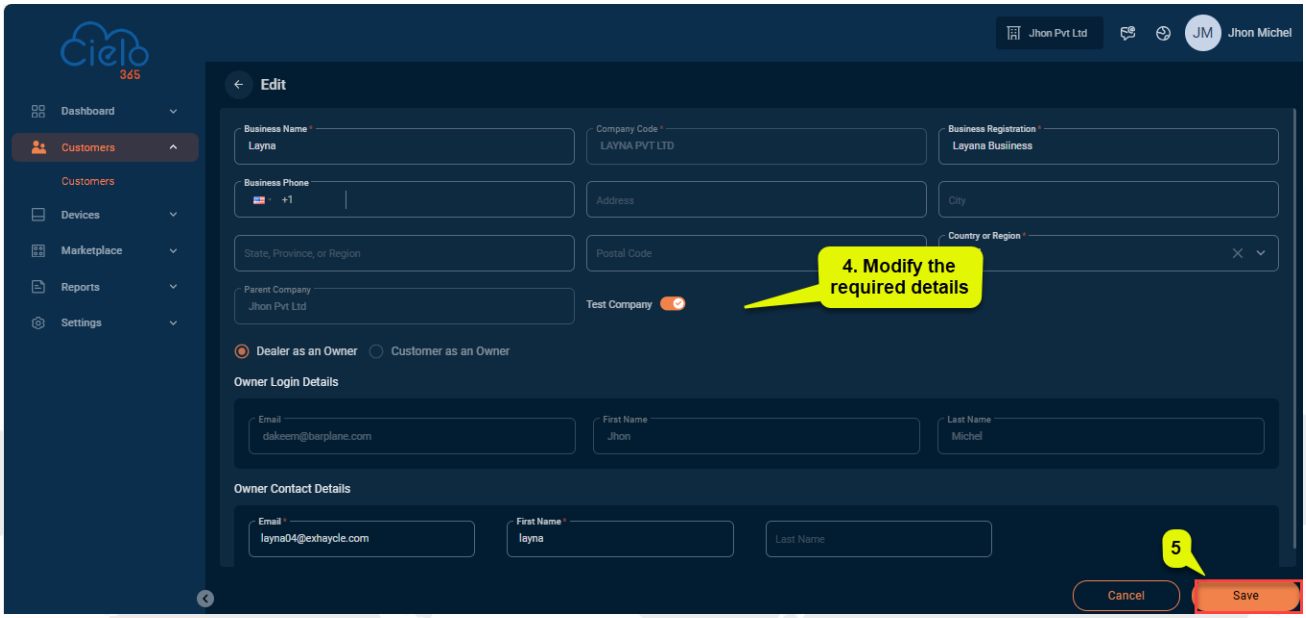
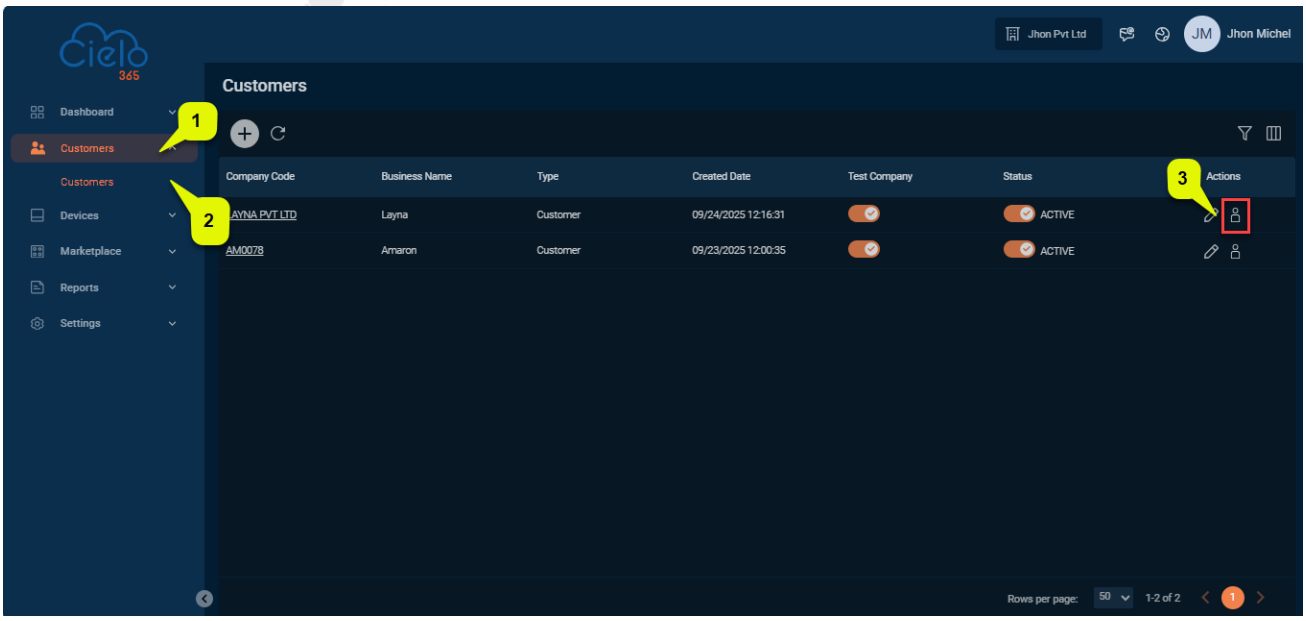


Edit existing customer information, follow these steps:

1. Select the customer you want to modify from the list on the customer interface.
2. Click the edit icon to modify the customer data.
3. Modify the necessary details and then click **Save** button to update the customer details.

Accessing the Customer's Account

The Impersonate function provides dealers for accessing to customers' accounts.



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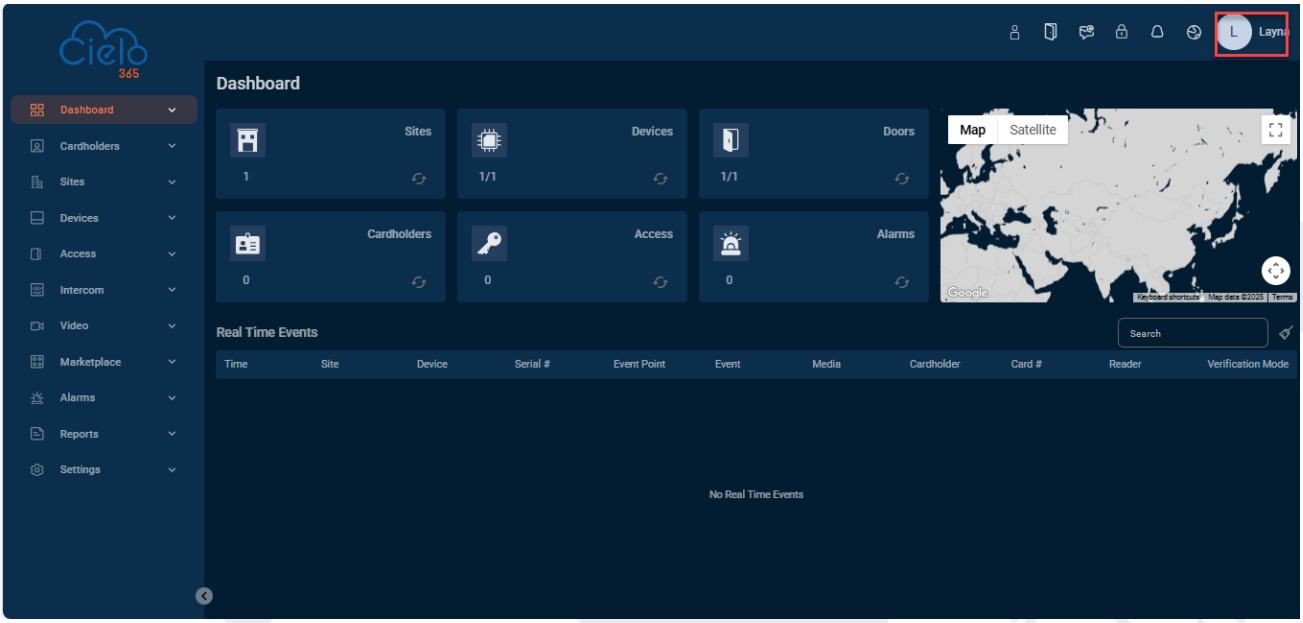
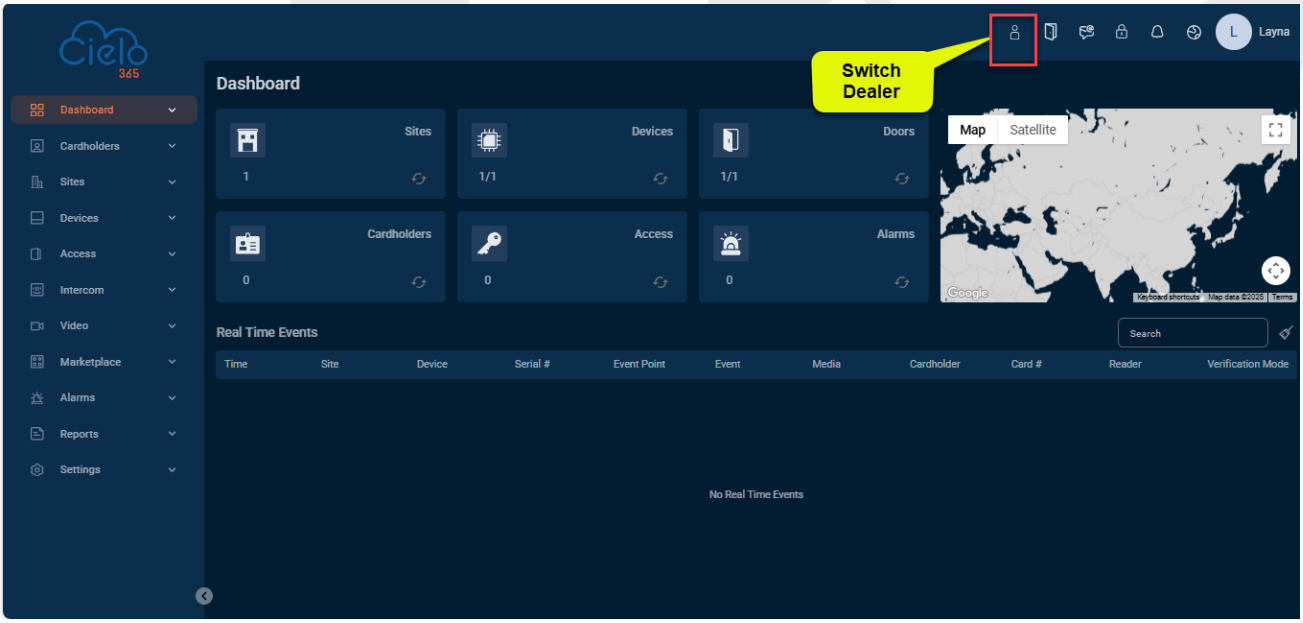
Impersonate a customer, follow these steps:

1. On the customer interface, click the impersonate icon and enter your password.
2. Click "**Confirm**" to access.



3. Click Switch dealer to switch the customer to the dealer.



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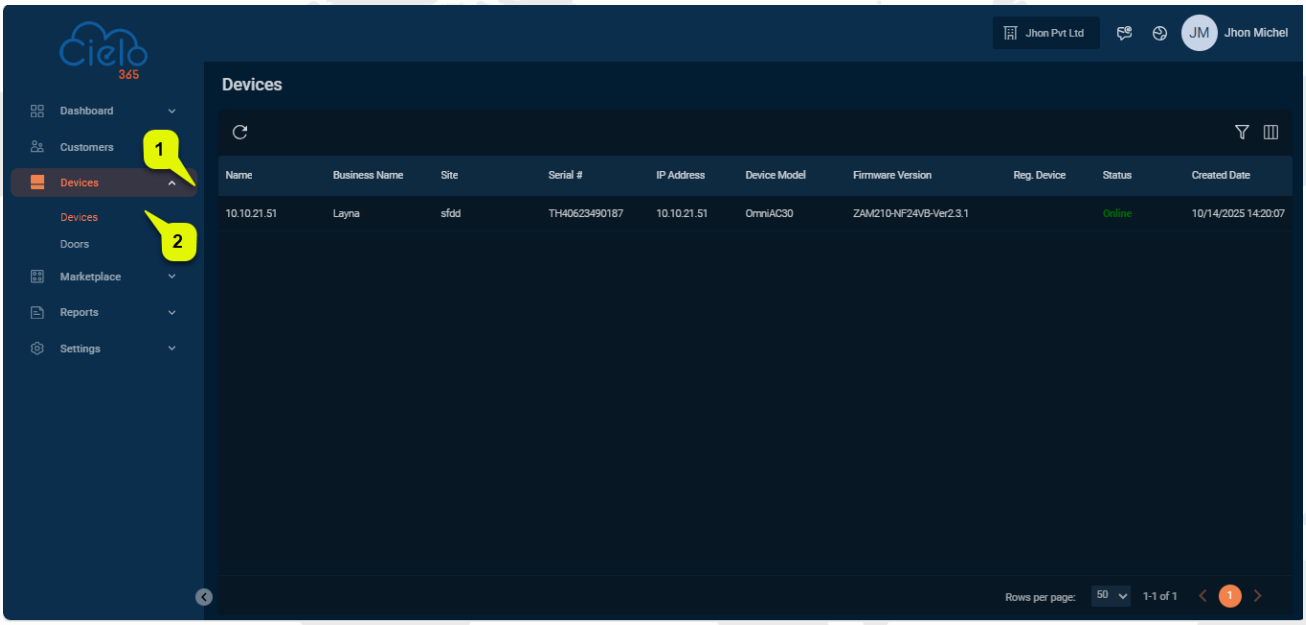
1.3 Devices

This module provides detailed information about the customer's devices and doors connected to their account.

1.3.1 Devices

If any devices are added by the customer, they can be seen here.



A brief note about the columns displayed:

Device Name: Displays the name of the device.

Business Name: Displays the business name.

Site: Displays the site's location.

Serial #: Displays the device's serial number.

IP Address: Displays the IP address of the connected device.

Device Model: Displays the device's model number.

Firmware Version: Displays the firmware version of the connected device.

Reg. Device: Indicates whether the device is used as a registration device.

Status: Displays the device's status.

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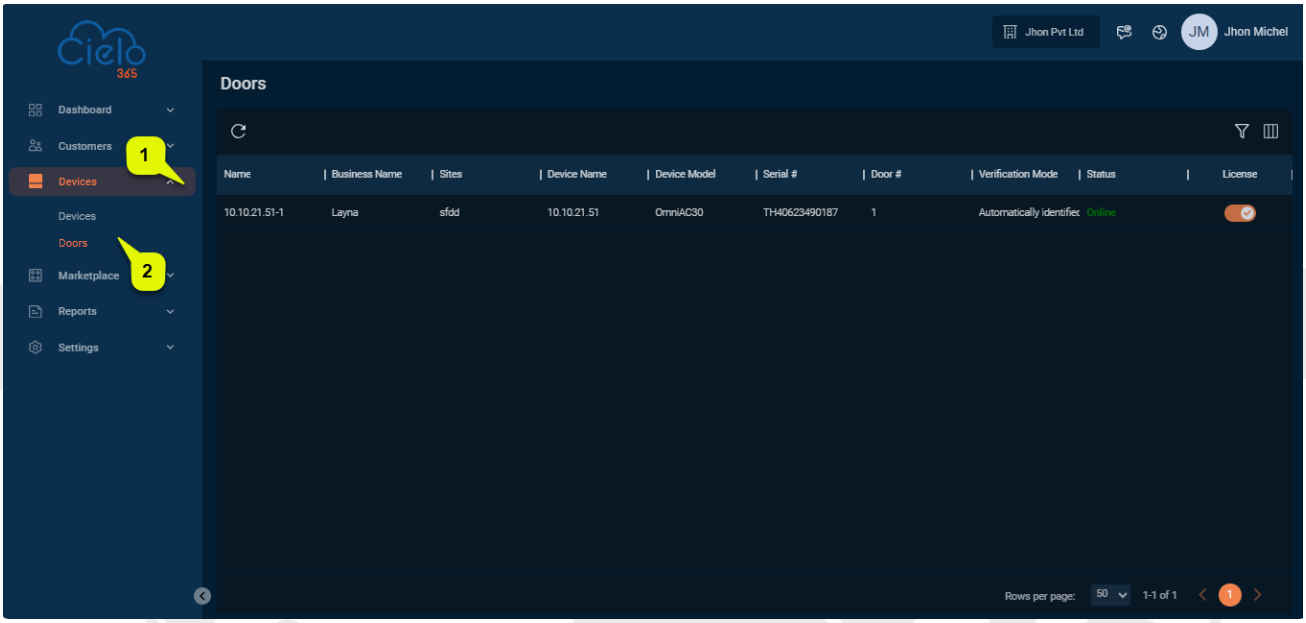
1.3.2 Doors

The Doors page will display the number of doors associated with the device.



A brief note about the columns displayed:

Door Name: Displays the name of the device's door.

Business Name: Displays the business name.

Sites: Displays the sites.

Device Name: Displays the name of the device.

Device Model: Displays the device's model number.

Serial #: Displays the device's serial number.

Door #: Displays the door number.

Verification Mode: Displays the verification mode assigned to the door.

Status: Display the device's status.

License: Display the license status of the door.

Note: It is used to check the status of the license assigned to the customer.

In the **License** column, look for the toggle icon.

- If the toggle is **enabled (orange with a checkmark)**, the license is active and available.
- If it is **disabled**, the license is not available or has expired.

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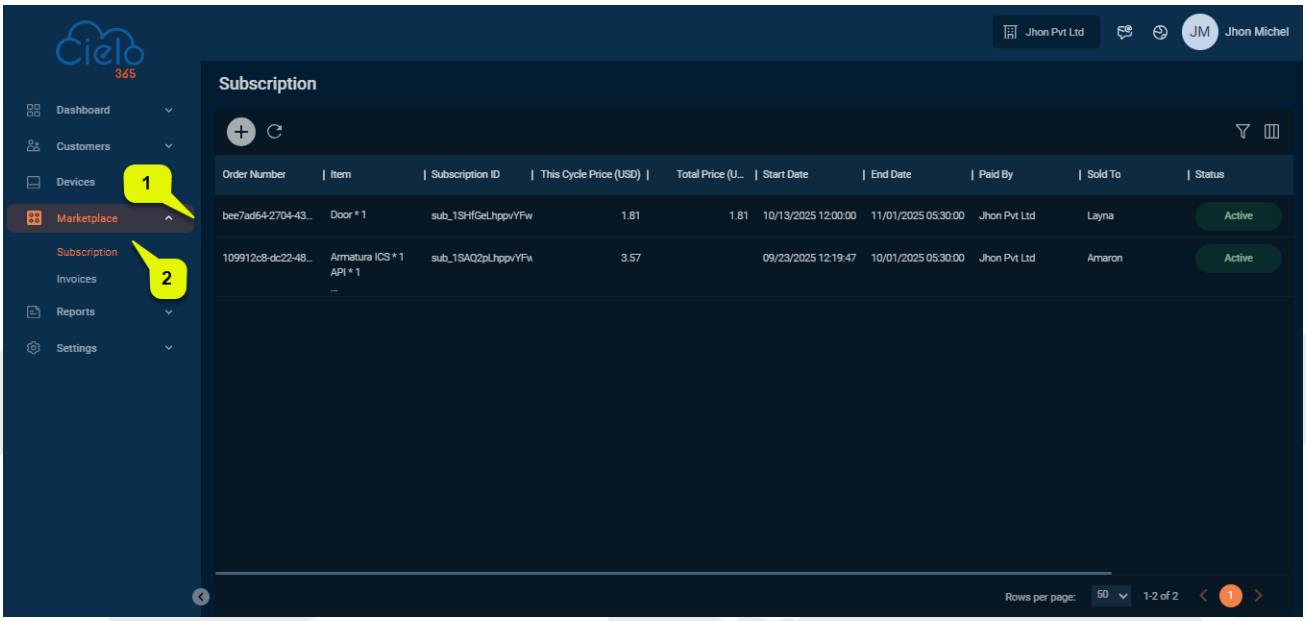
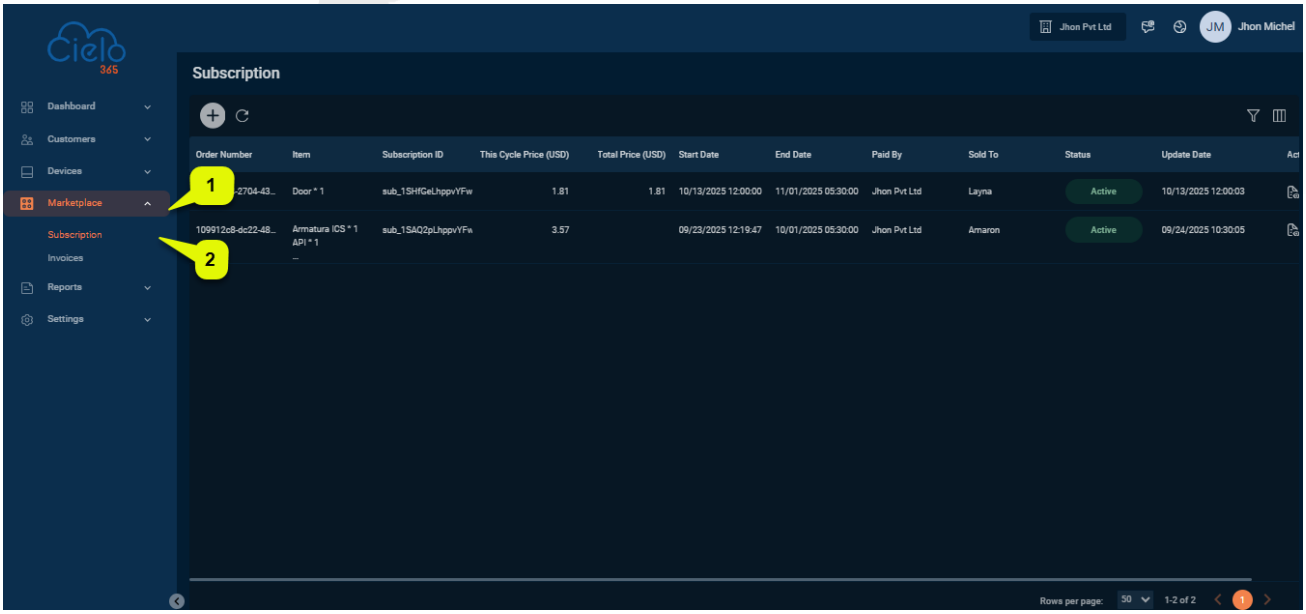
1.4 Marketplace



1.4.1 Subscriptions

The **Subscriptions** function displays the subscription details assigned by the administrator, which the dealer can then sell to the customer.

The **Subscriptions** option allows the dealer to purchase and assign a subscription to the customer. Once the purchase is confirmed, the subscription charges will be automatically deducted.



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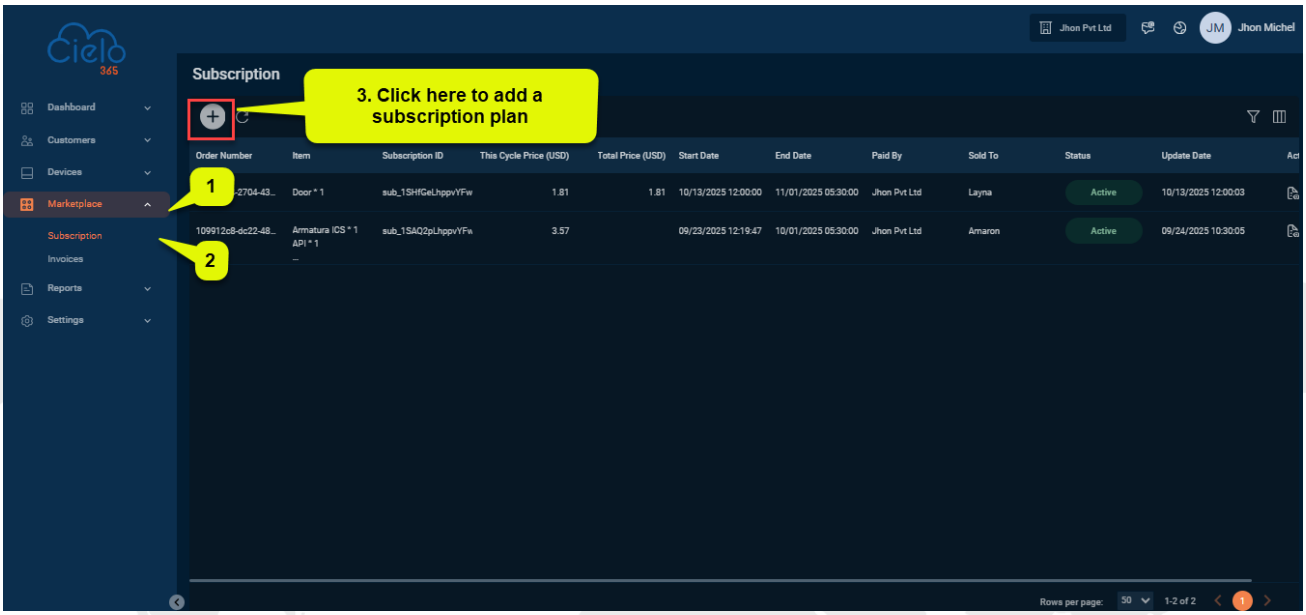
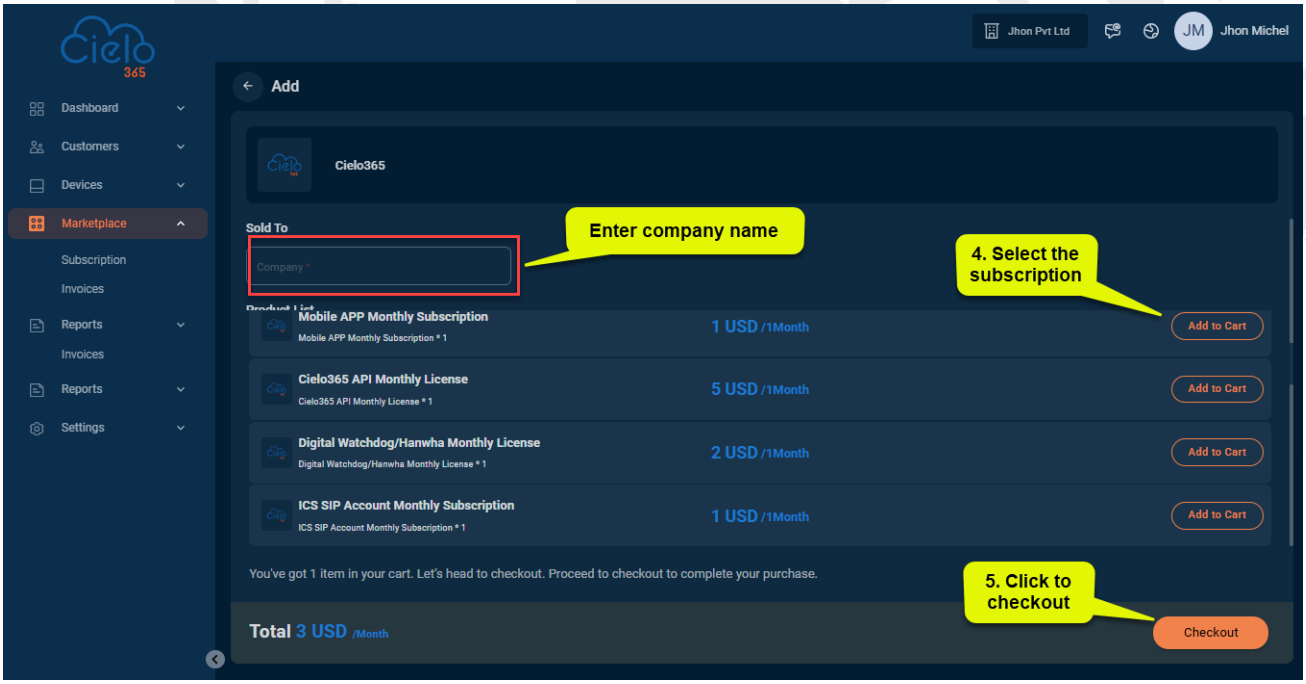
Adding a Subscription

The Add function will let the user add a subscription plan to the company.





Select a subscription plan, follow the steps below:

1. On the Subscription interface, click Add to add a subscription plan.
2. On the Add Interface, add the subscription plan to the cart.
3. After entering the details and adding the subscription plan to the cart, click checkout.

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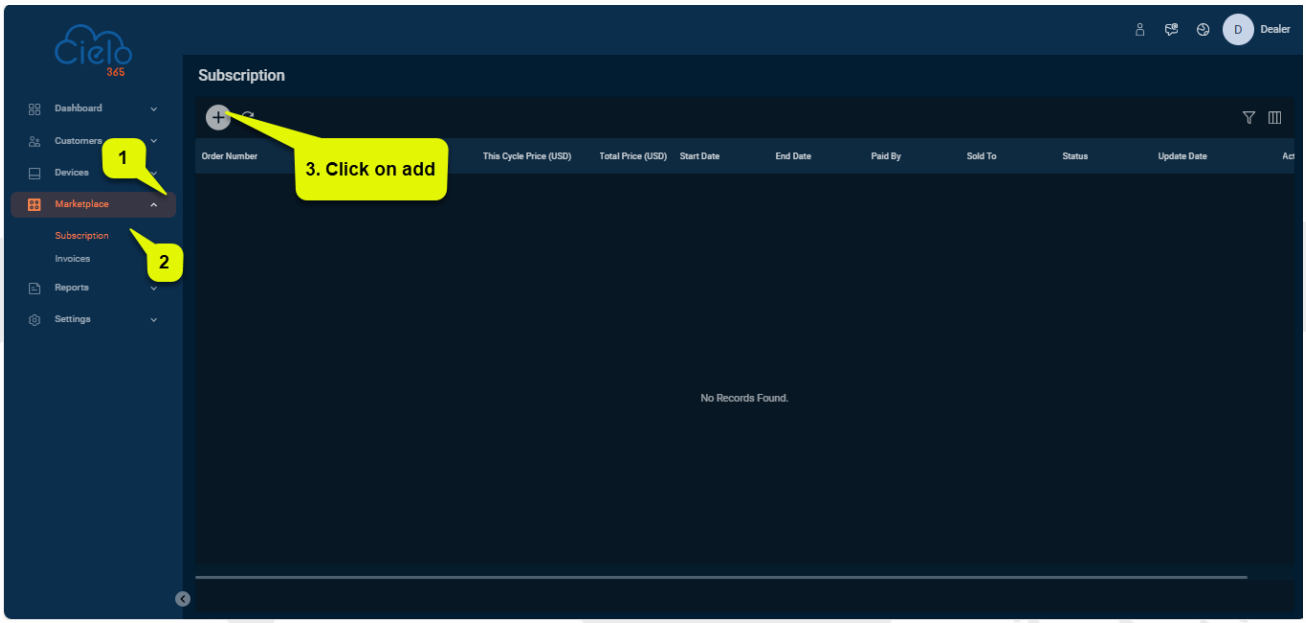
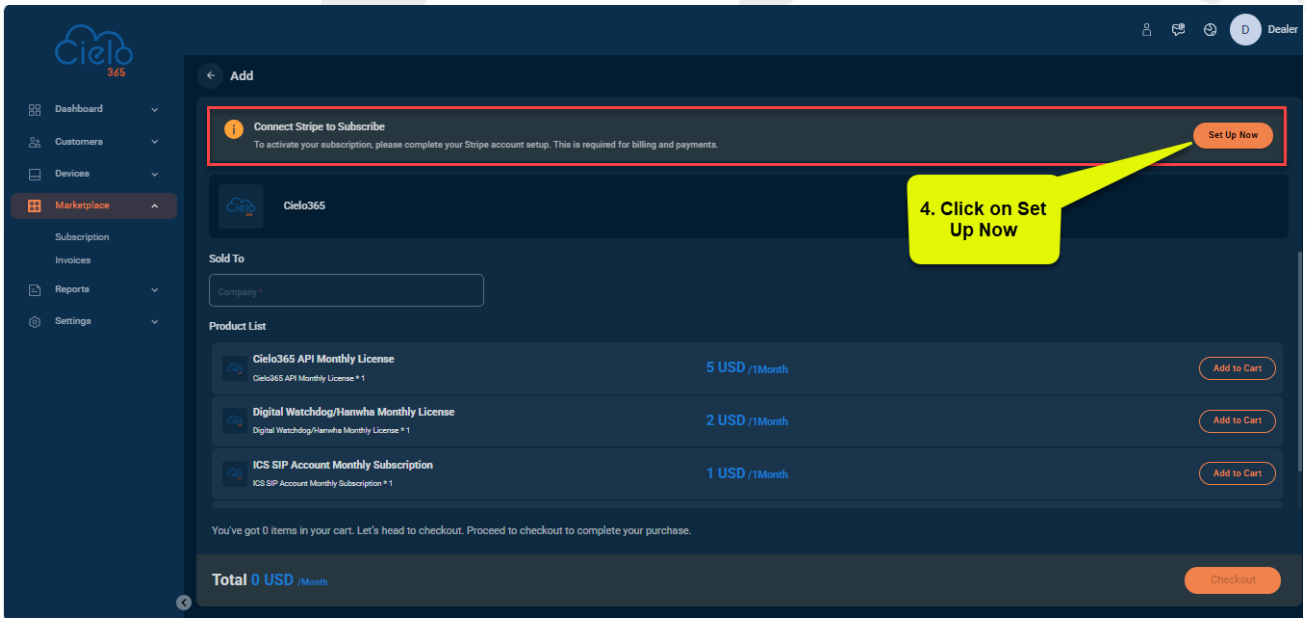
Note: If the user does not have a Stripe Account, a first-time setup is required. Follow the steps below:

1. On the **Subscription** interface, click **Add** to create a new subscription plan.



2. In the Add interface, a pop-up will appear prompting you to **Connect Stripe to Subscribe**. Click **Set Up Now** , this will navigate you to the **My Company** page within the Stripe Payment module.



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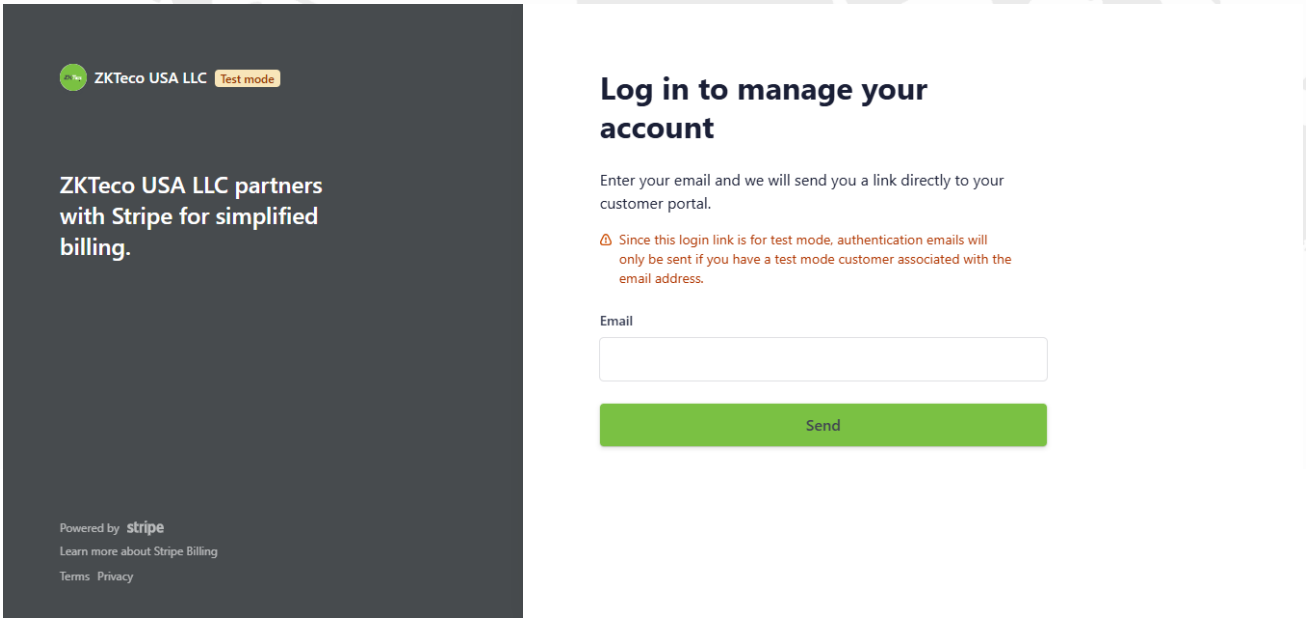
3. Enter your details in the **Stripe Payment** section, then click **Link Stripe**. You will be redirected to the Stripe billing page (**https://billing.stripe.com**).



4. Fill in your **Stripe account details** and submit.

Once the process is completed, the dealer's Stripe account will be successfully linked. Click **Save** to confirm.

After linking, the dealer can create and assign subscription plans to customer accounts. The subscription amount will be automatically deducted from the dealer's Stripe account whenever a new subscription is purchased.

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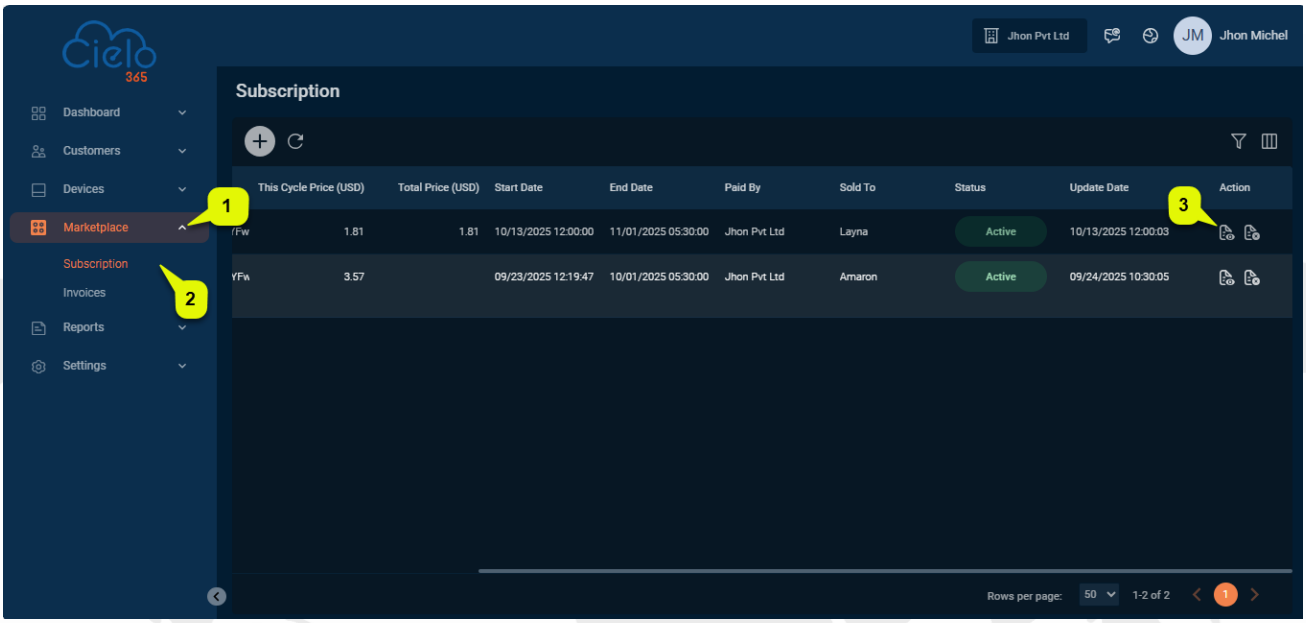
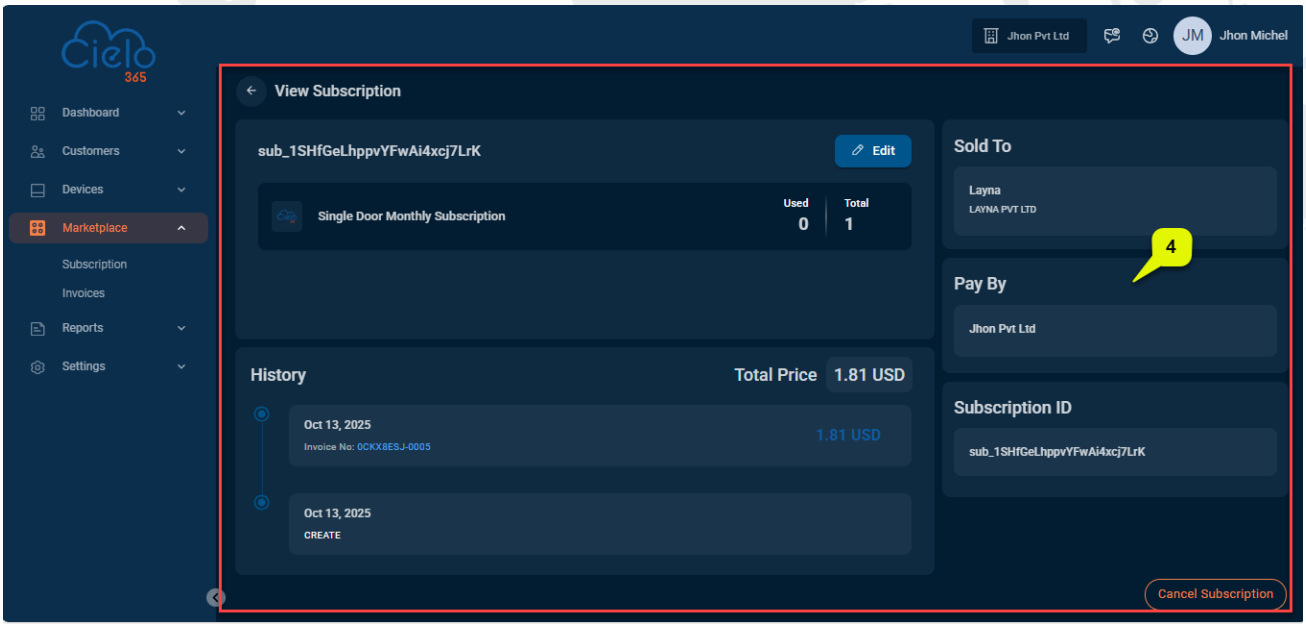
View a Subscription Plan Details:

The View function enables users to view the subscription plan details.





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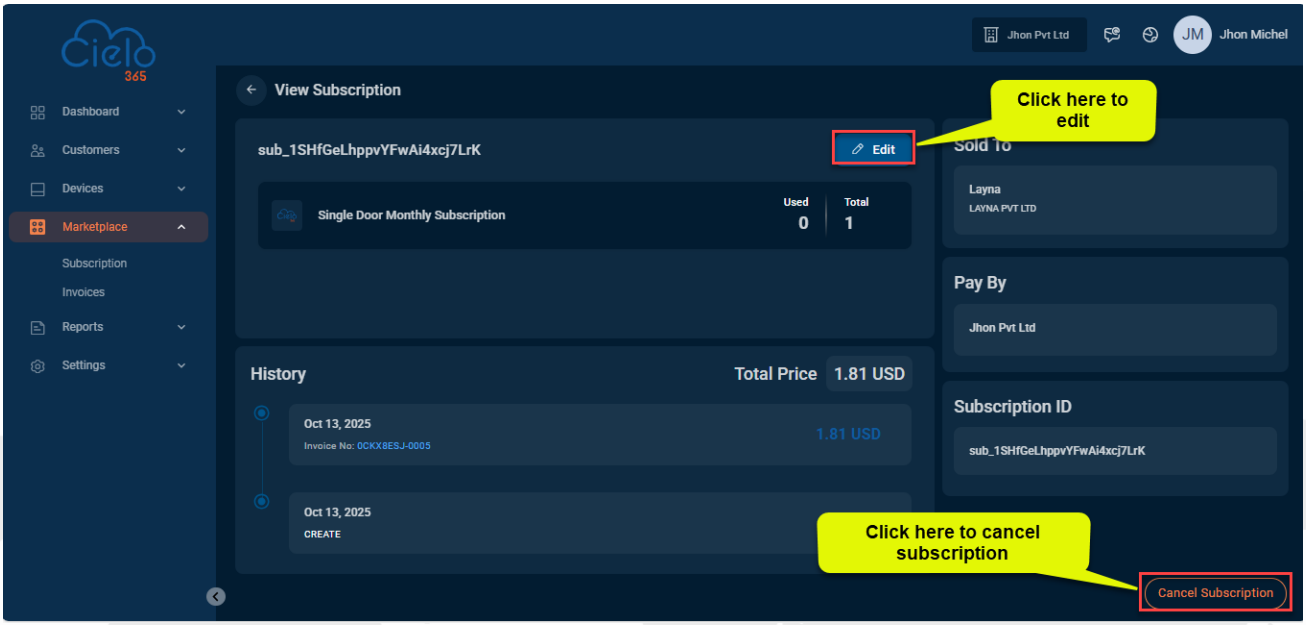

View the subscription plan information, follow these steps:

Click **View** to check the subscription details. In this view, you can also edit or cancel the subscription.

Edit a Subscription Plan Details:

Edit the subscription plan information, follow these steps:

On the view subscription plan detail page, click **Edit**. Then select the company, add a product list to cart, and click Checkout, This will update the subscription plan accordingly.

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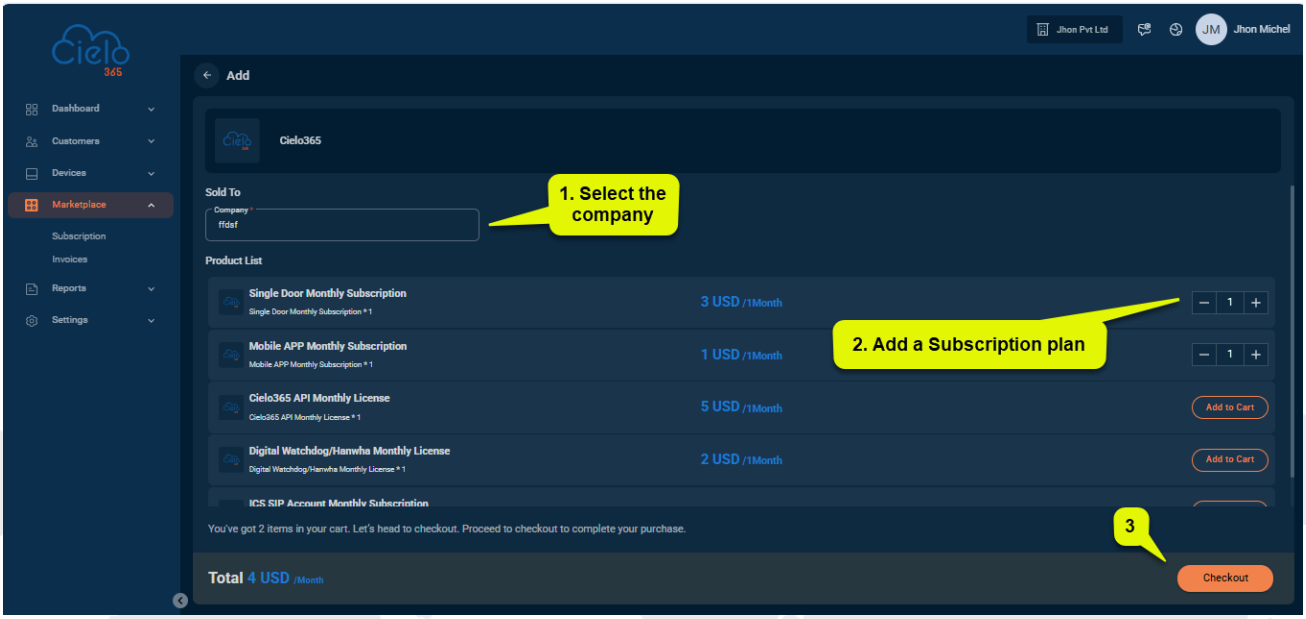
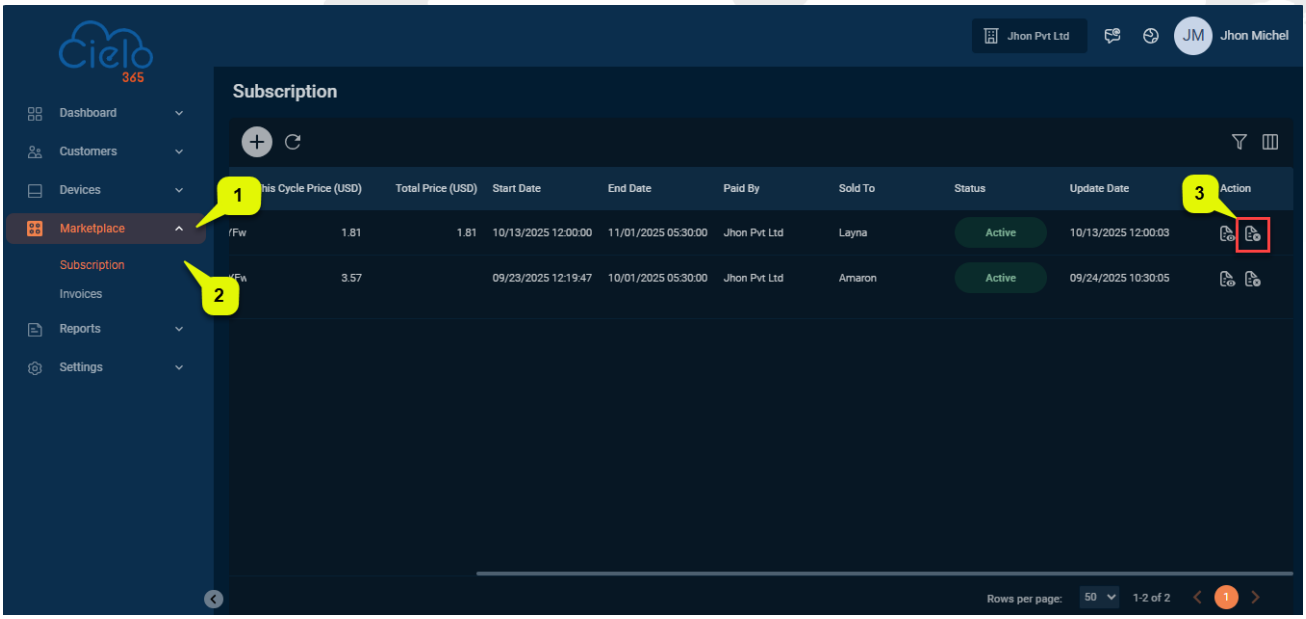


Cancel a Subscription Plan

The **Cancel Subscription** option lets the dealer terminate the customer's subscription plan. Once a plan is cancelled, the customer must acquire a new subscription to add devices. Subsequently, the customer will be unable to log in, and a new subscription is necessary to regain access to the application.



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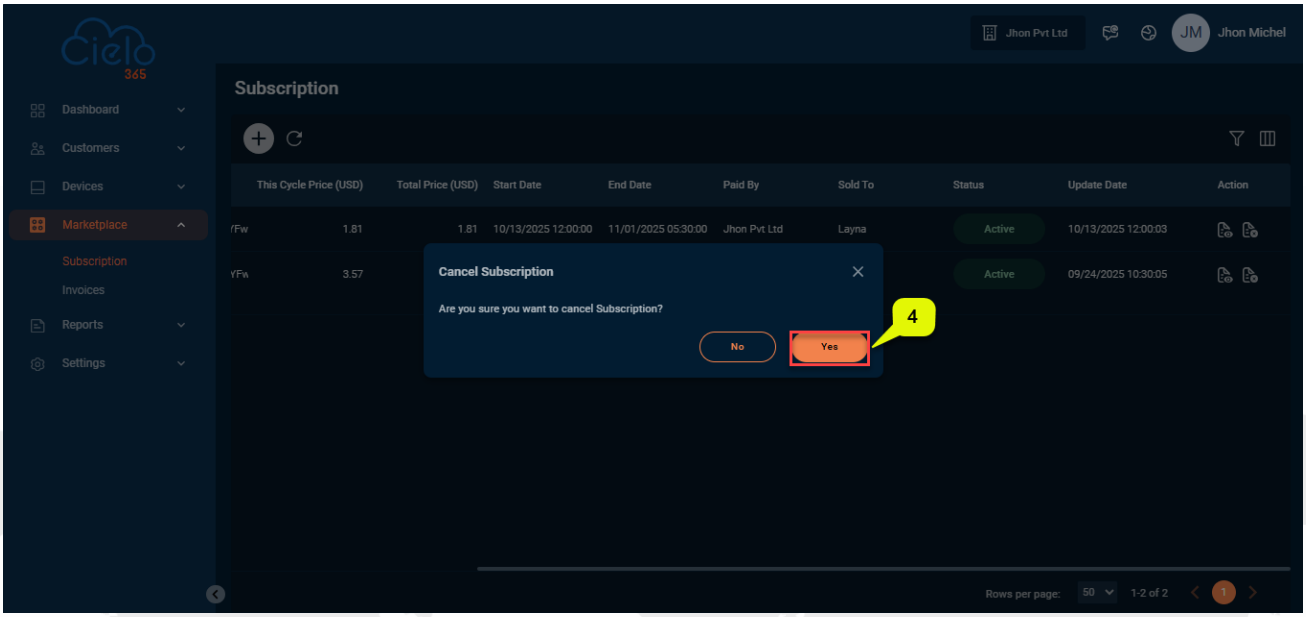
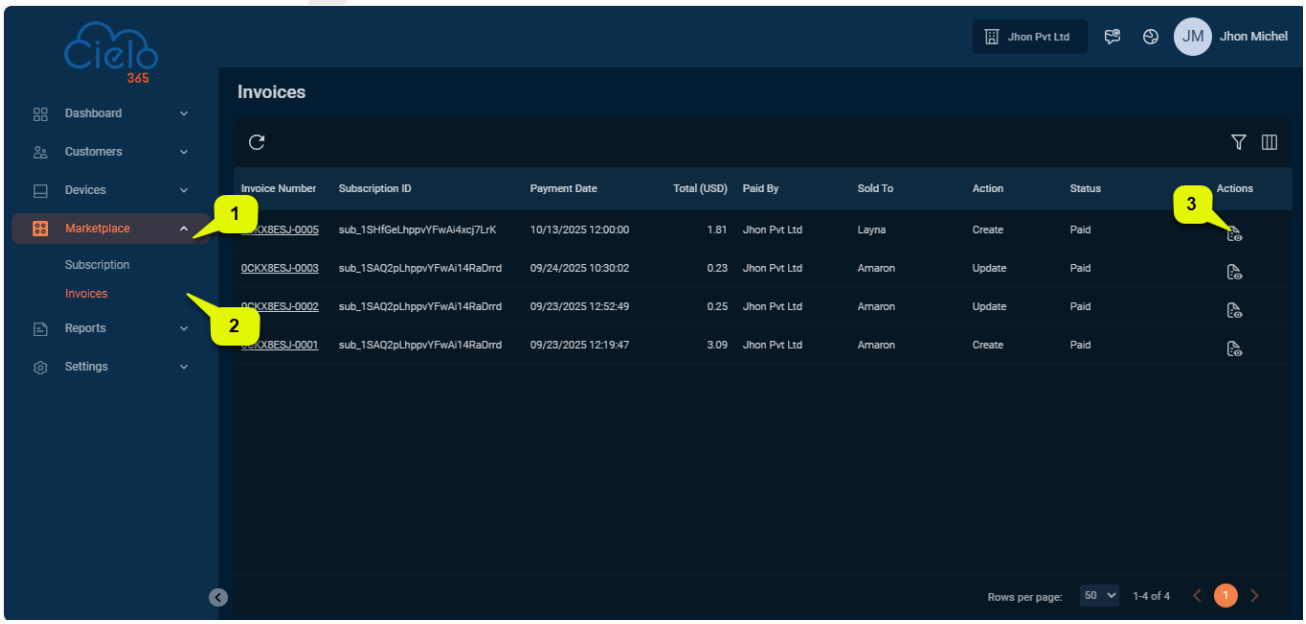


Cancel the subscription plan, follow these steps:

Click **Cancel**, a confirmation message will appear: “Are you sure you want to cancel subscription?” click Yes to confirm and cancel the subscription.

1.4.2 Invoice

The Invoice offers a detailed overview of key billing information, including the Company Name, Invoice Number, Payment Date, Total Payment, Paid by, Sold to, Status, Subscription item and can also download the invoices.



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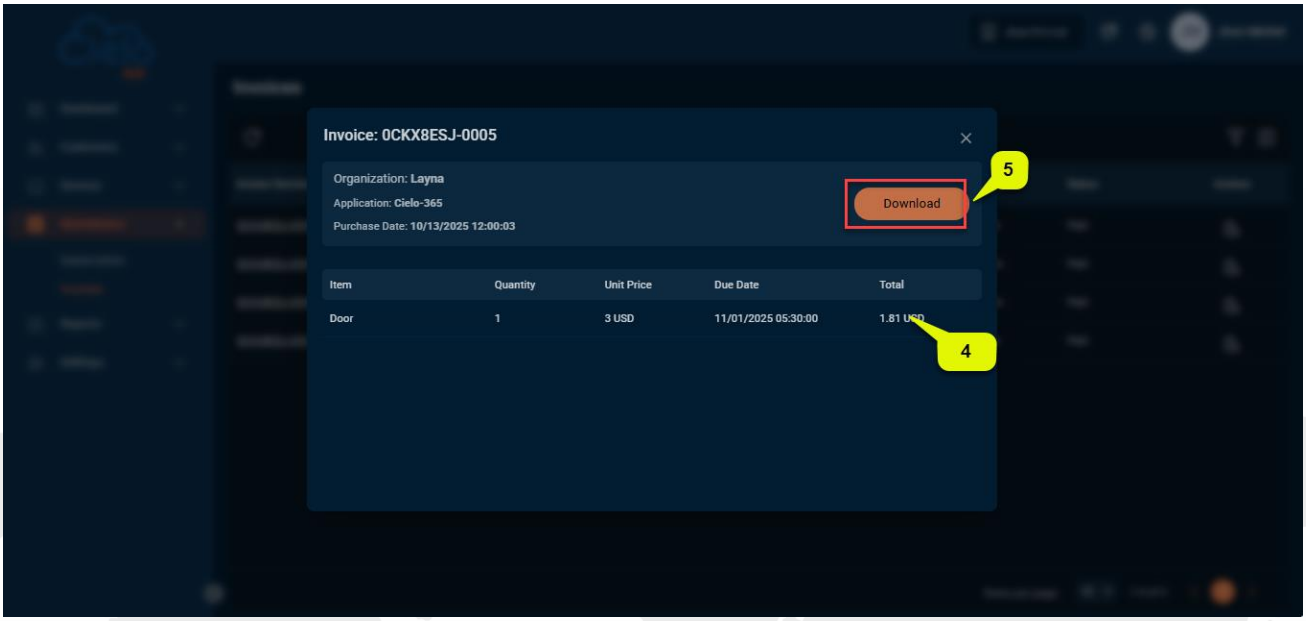
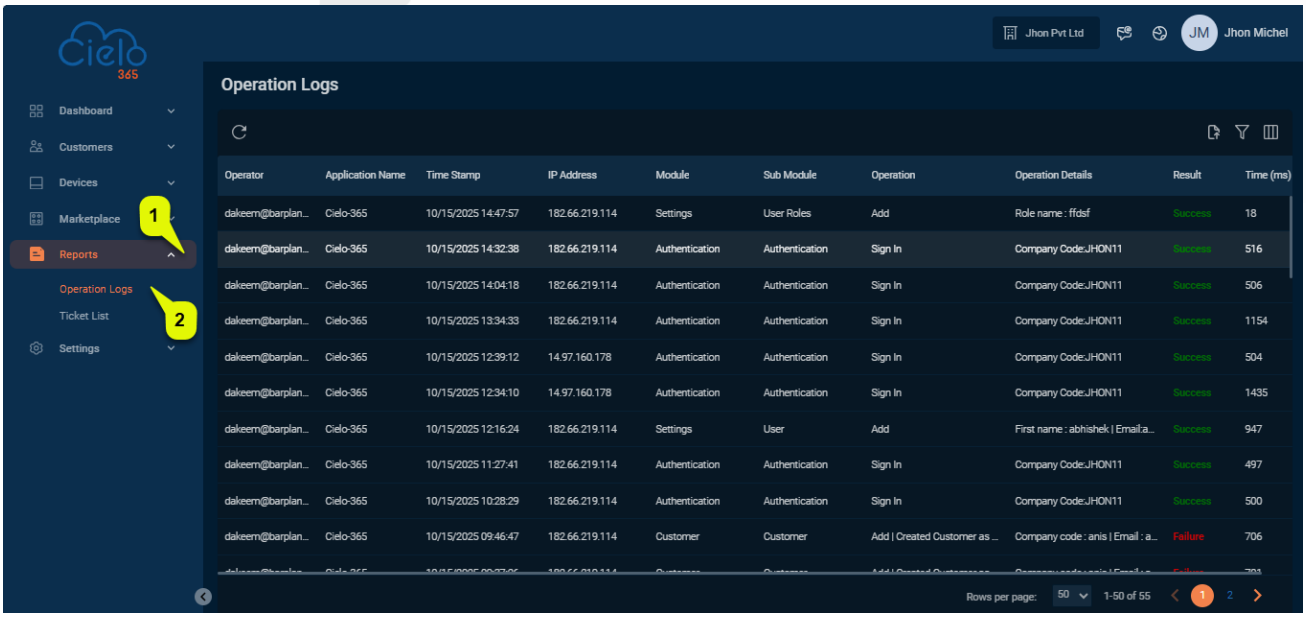


1.5 Reports

1.5.1 Operation Logs

The **Operation Logs** record all the actions taken within the system.

View the system's operation history, click **Reports > Operation Logs**.



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A brief note about the columns displayed:

Operator: Displays the user who operated the system.

Application Name: Displays the name of the application.

Time Stamp: Displays the time and date of the executed operation.

IP Address: Displays the device's IP address.

Module: Displays the module where the operation occurred.

Sub Module: Displays the sub-module where the operation occurred.

Operation: Displays the operation event.

Operation Details: Displays the event's details.

Result: Displays the status indicating whether the operation was completed successfully.

Time: Displays the total time taken for the execution.

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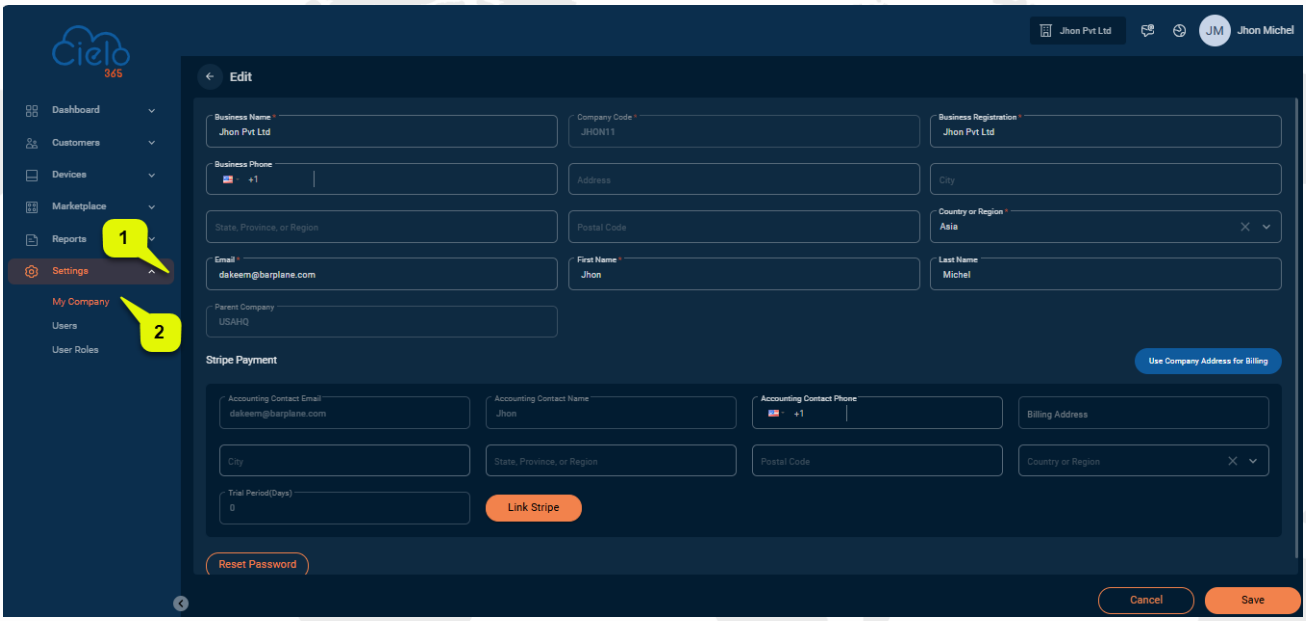
1.6 Settings

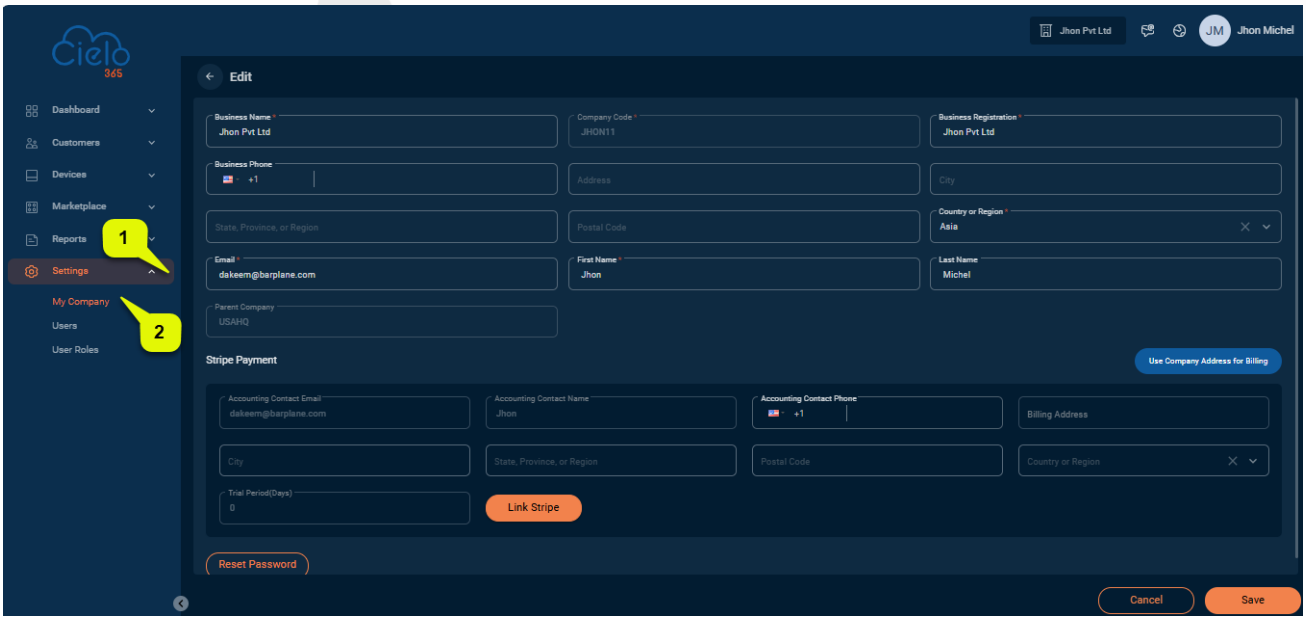
1.6.1 My Company

My Company allows administrators to manage and update essential company information, contact details, and configure Stripe payment integration.

View my Company details, click **Settings > My Company**.



Stripe Payment:



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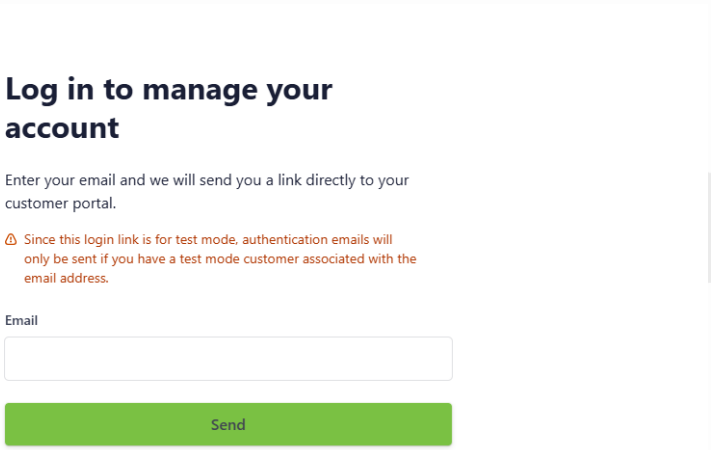
1. Click the **My Company** page it will navigate to the My Company edit page.
2. Enter the required **email ID** (if not already provided) and complete all mandatory fields.
3. Click **Link Stripe,** and you will be redirected to the **Stripe billing page (https://billing.stripe.com)**.



4. Fill in your **Stripe account details** and submit.

Once completed, the dealer's Stripe account will be successfully linked. Click Save.

Note: After linking, the dealer can create and assign subscriptions to customer accounts. The **subscription amount** will be automatically **deducted from the dealer's Stripe account** whenever a new subscription is purchased.

1.6.1.1 Reset Password

Click on Reset Password, and a pop-up will appear: 'Are you sure you want to send the reset password link to the customer's email?' Then click **Yes.**

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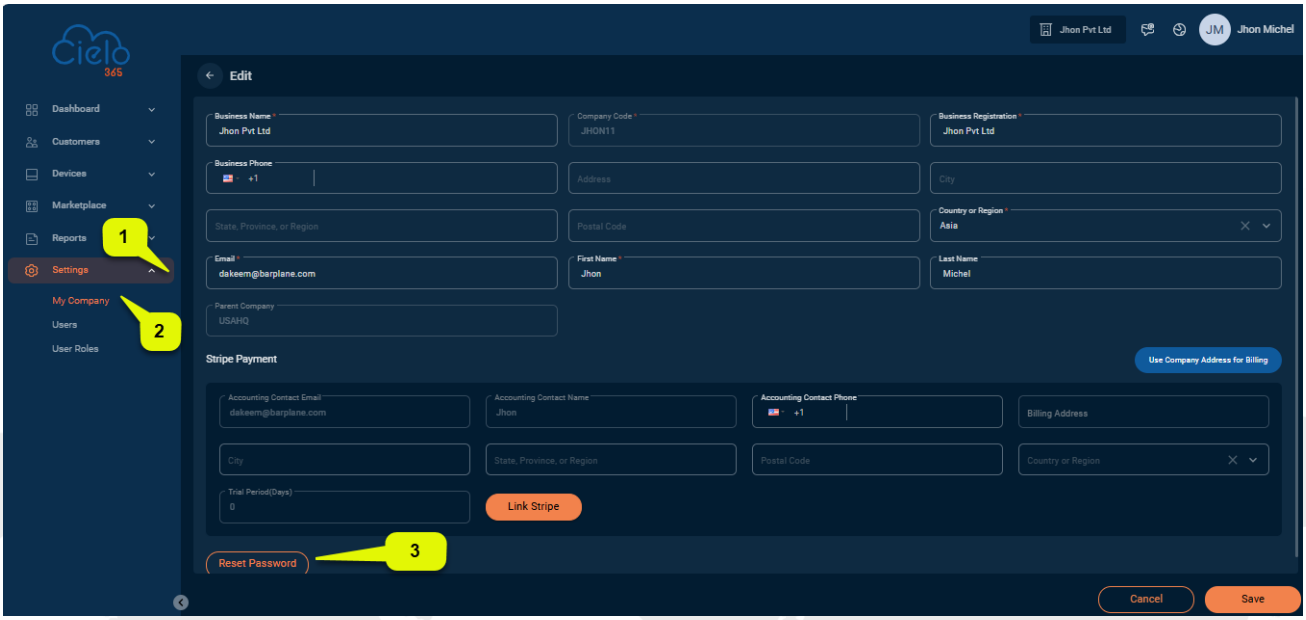

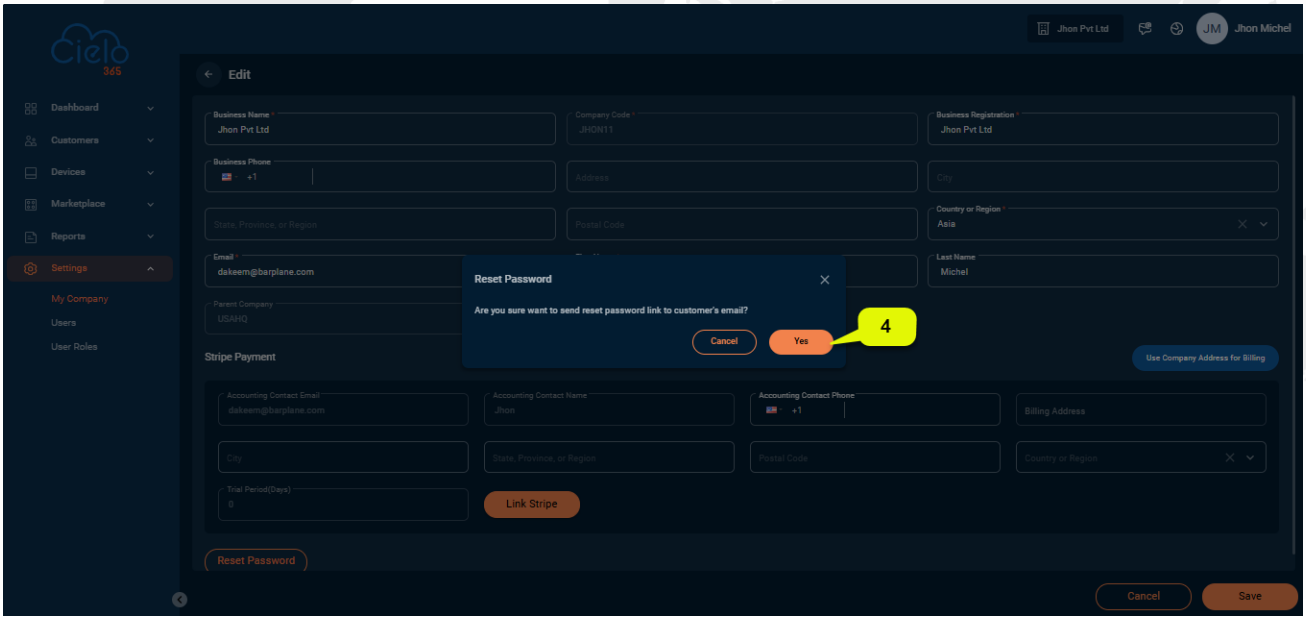

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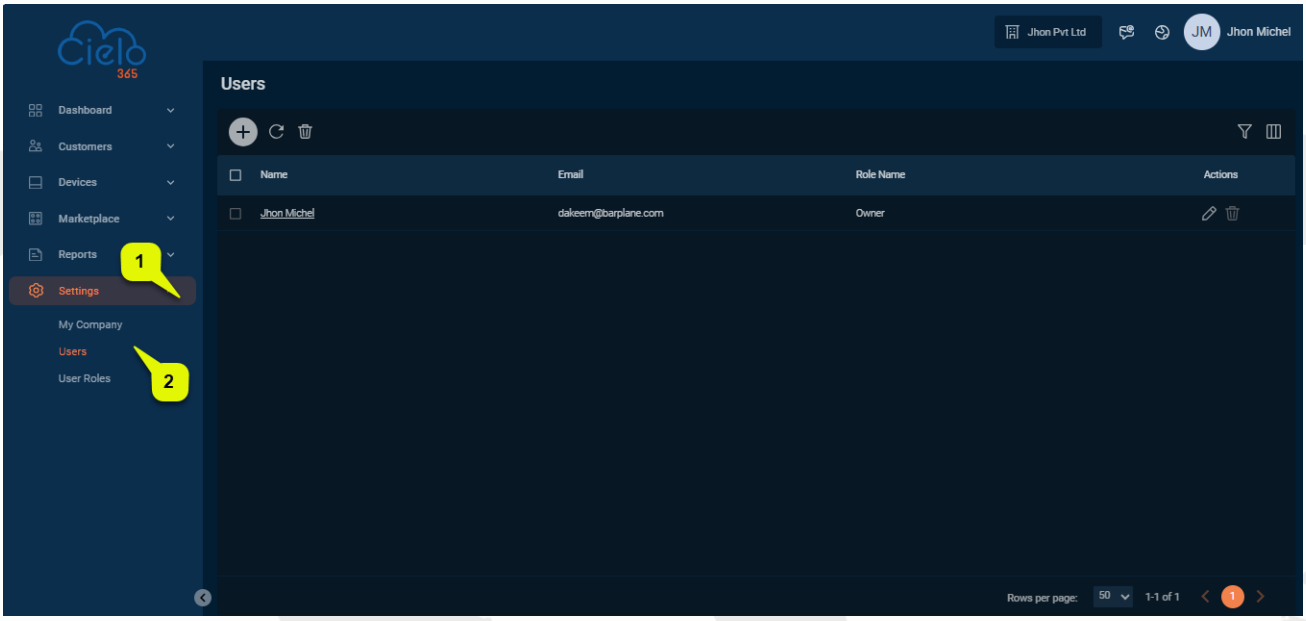
1.6.2 Users

How to set up a User account (Users)

The **User** option allows dealers to manage multiple users.



Adding a User

Perform the following steps to add a new user:

- Click **Add** to add a new user.
- A window appears as shown in the image below, enter the user details and assign a role, then click Add to update a user.

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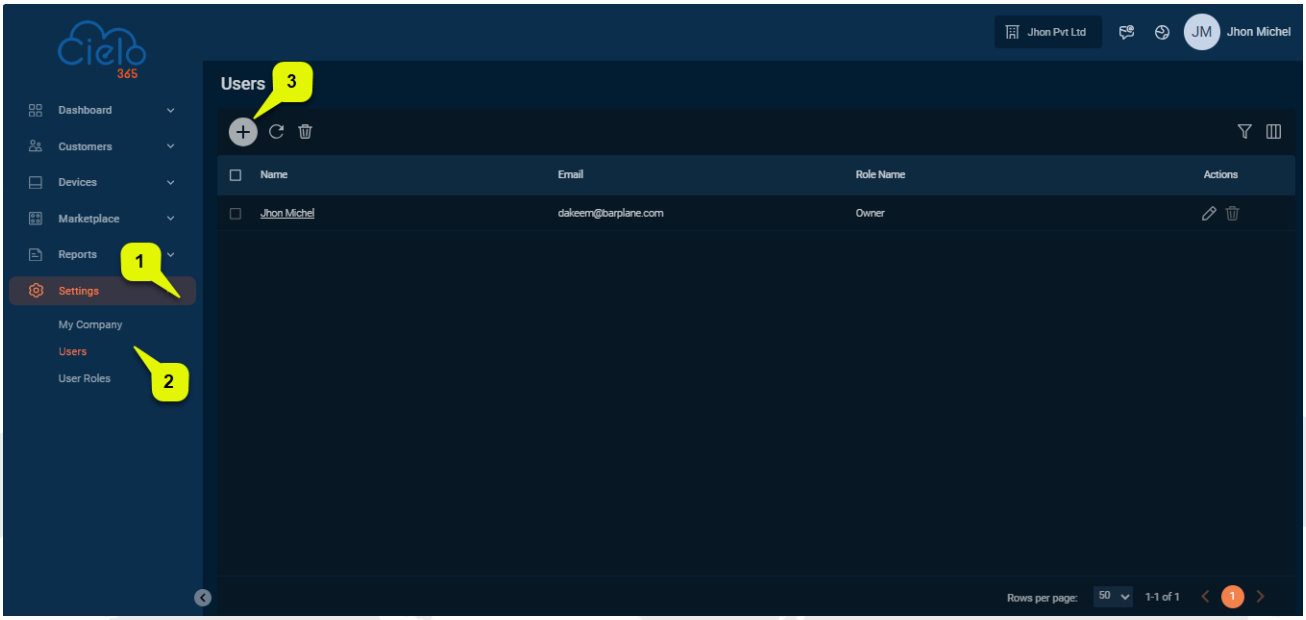
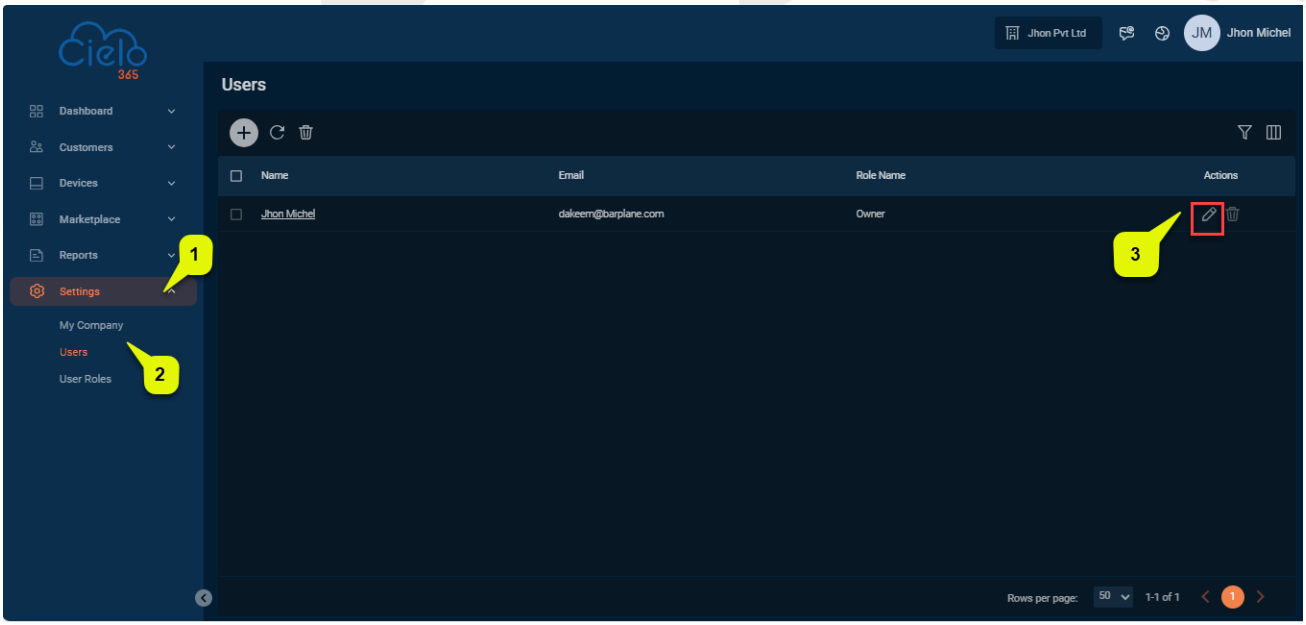


Note: Once an Email is provided for a user, it cannot be changed in the future.

Edit a User

Edit a User, perform the following steps:

1. In the user list, select the user to be modified and click the **edit** icon.
2. Edit the required details in the user and click **Save** to update the user details.



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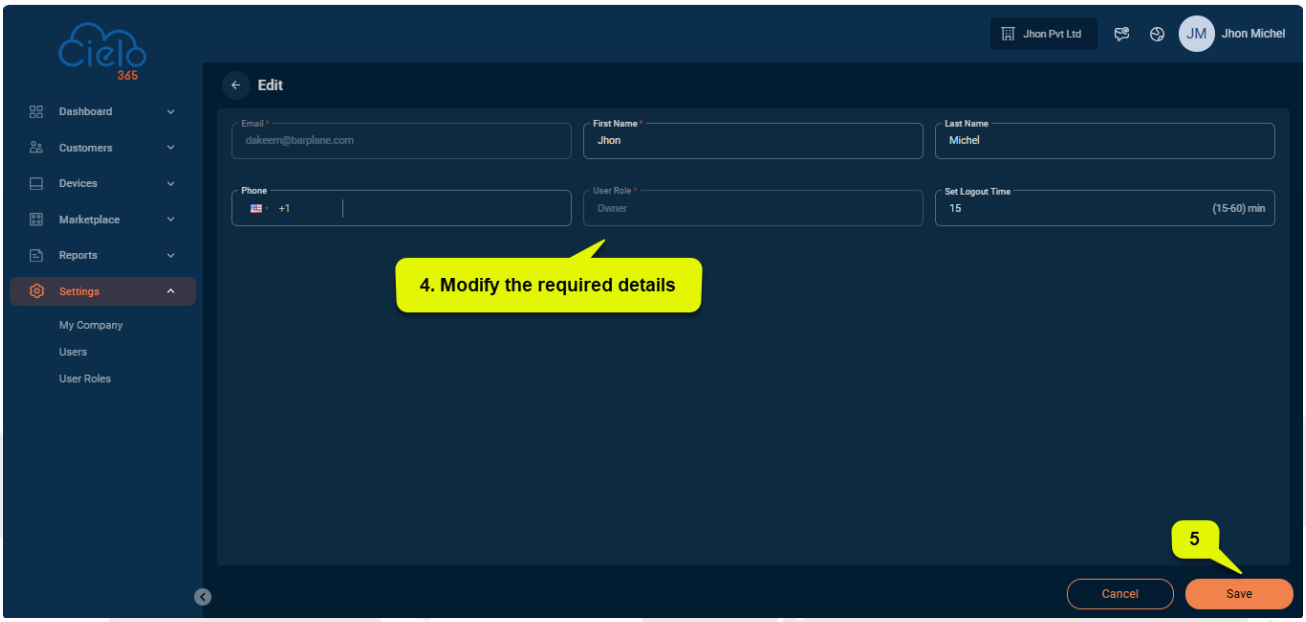

The columns are explained as follows:

First, Last Name & Email: The name and email of the user.

Phone Number: Enter the user's phone number.

Role Name: Select the role for the user.

Set Logout Time: Enter the user's set logout time.

3. Click **Save** after entering the required details.

Note: Once an Email is provided for a user, it cannot be changed in the future.

Deleting a User:

Perform the following steps to delete a user:

1. In the user's list, select the user to be deleted and click **Delete**.
2. On the pop-up that appears, click **Confirm** to delete the user.

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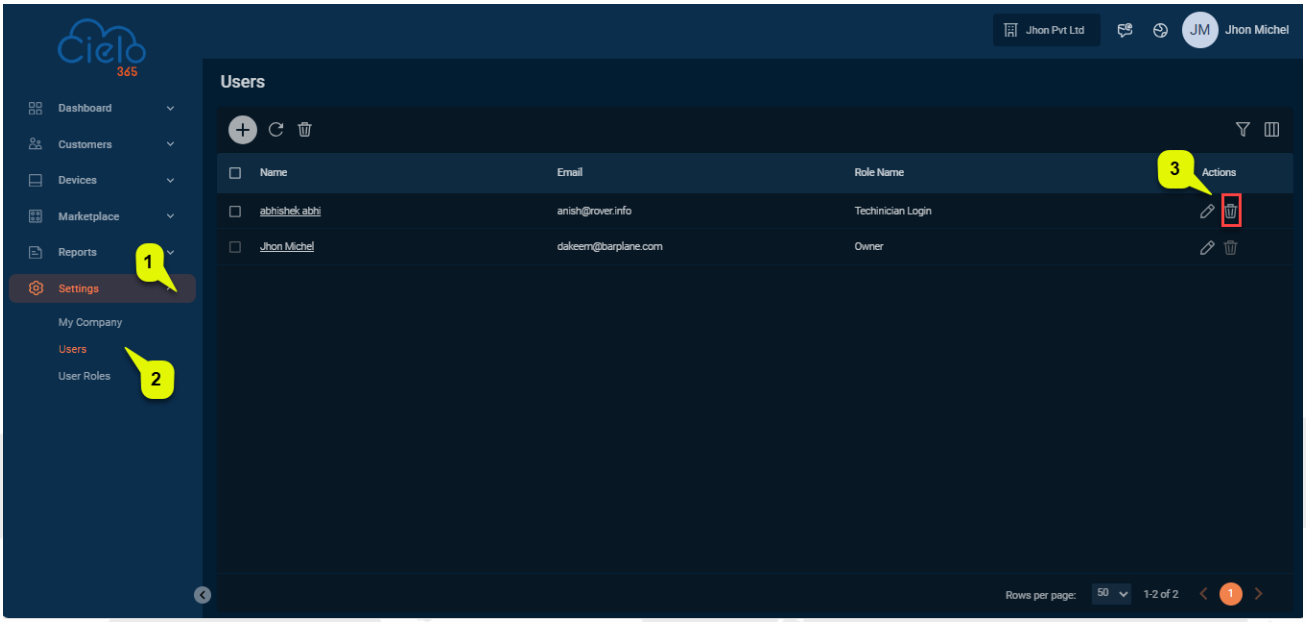

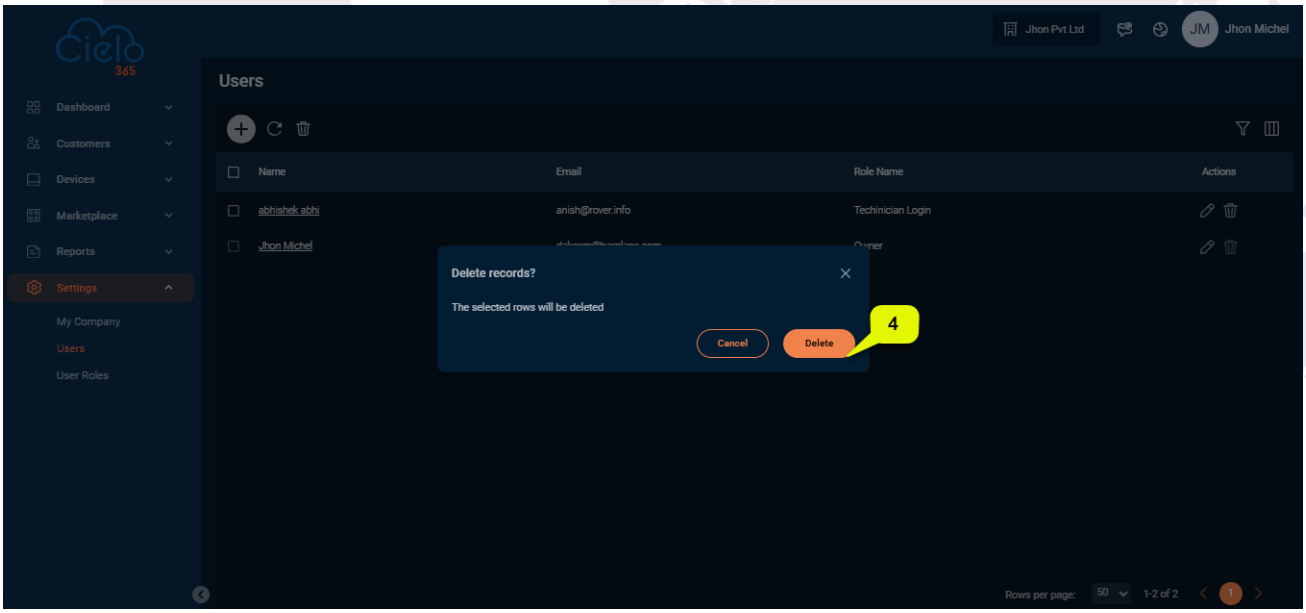

Note: A user with the role of **owner** cannot be deleted.

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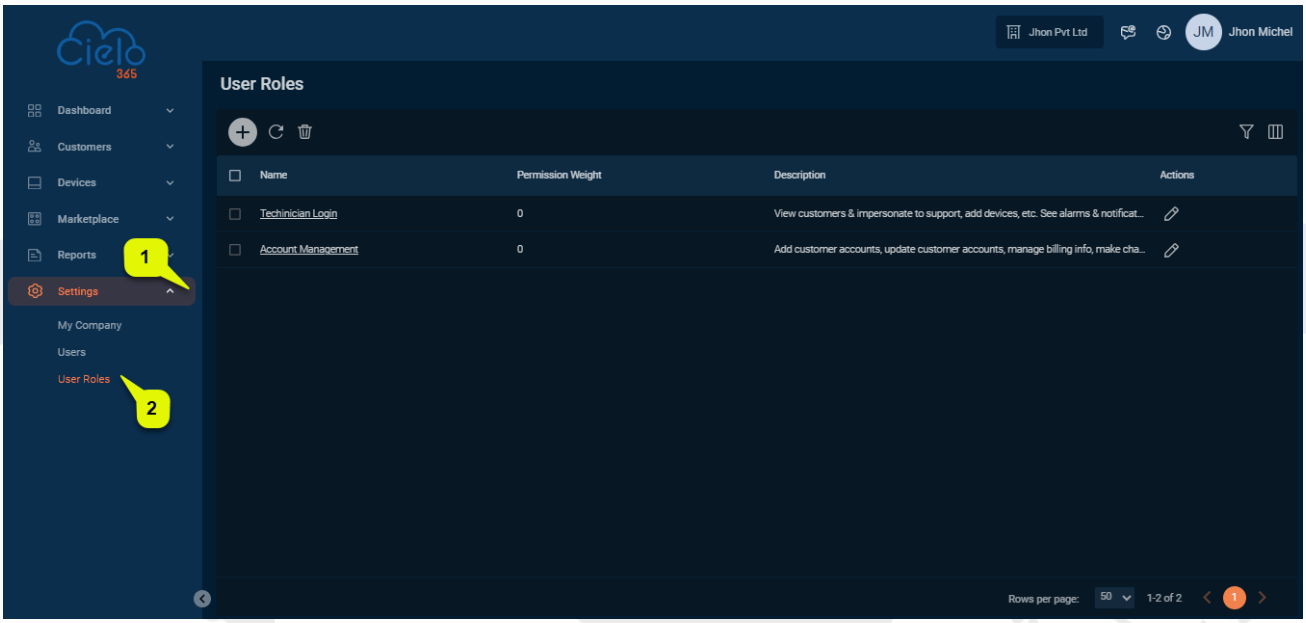
1.6.3 Users Roles

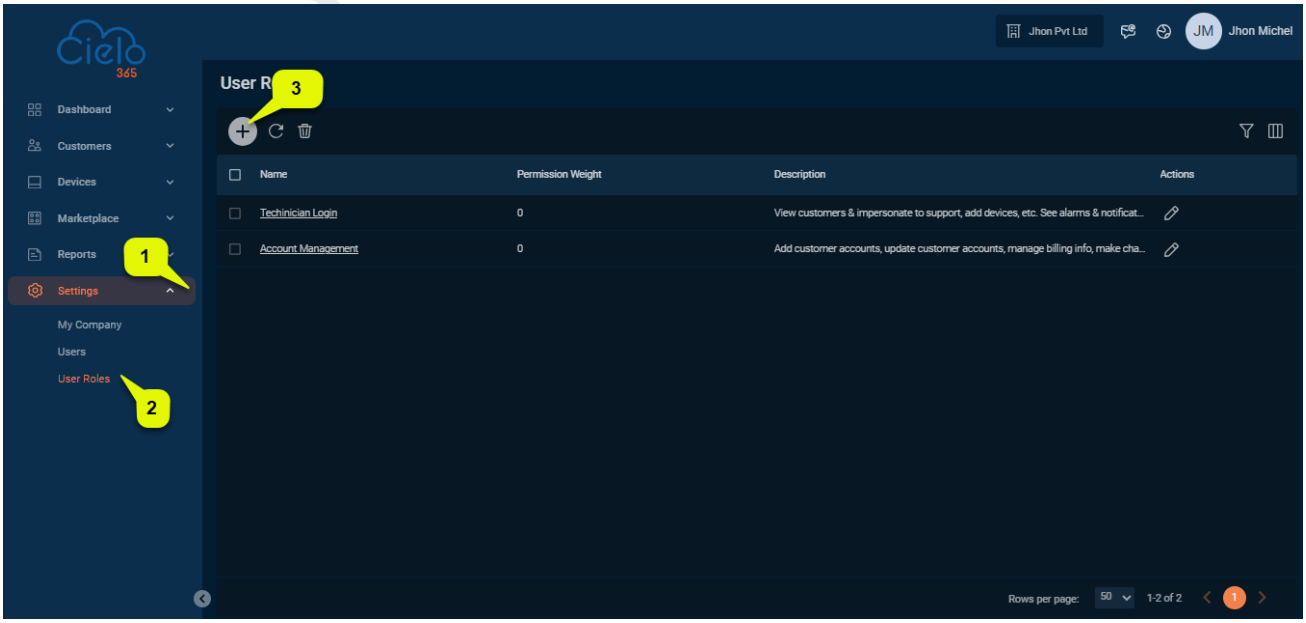
The Superuser assigns different user levels to different users. Avoid assigning one by one, the Superuser can create a user role and set roles with specific access levels for other users.



Add a User Role

Perform the following steps to add a new user role:

1. Click **Add** to add a new user role.
2. A window appears, as shown in the image below. Enter the details, select the permissions, and then click Add to update the changes.



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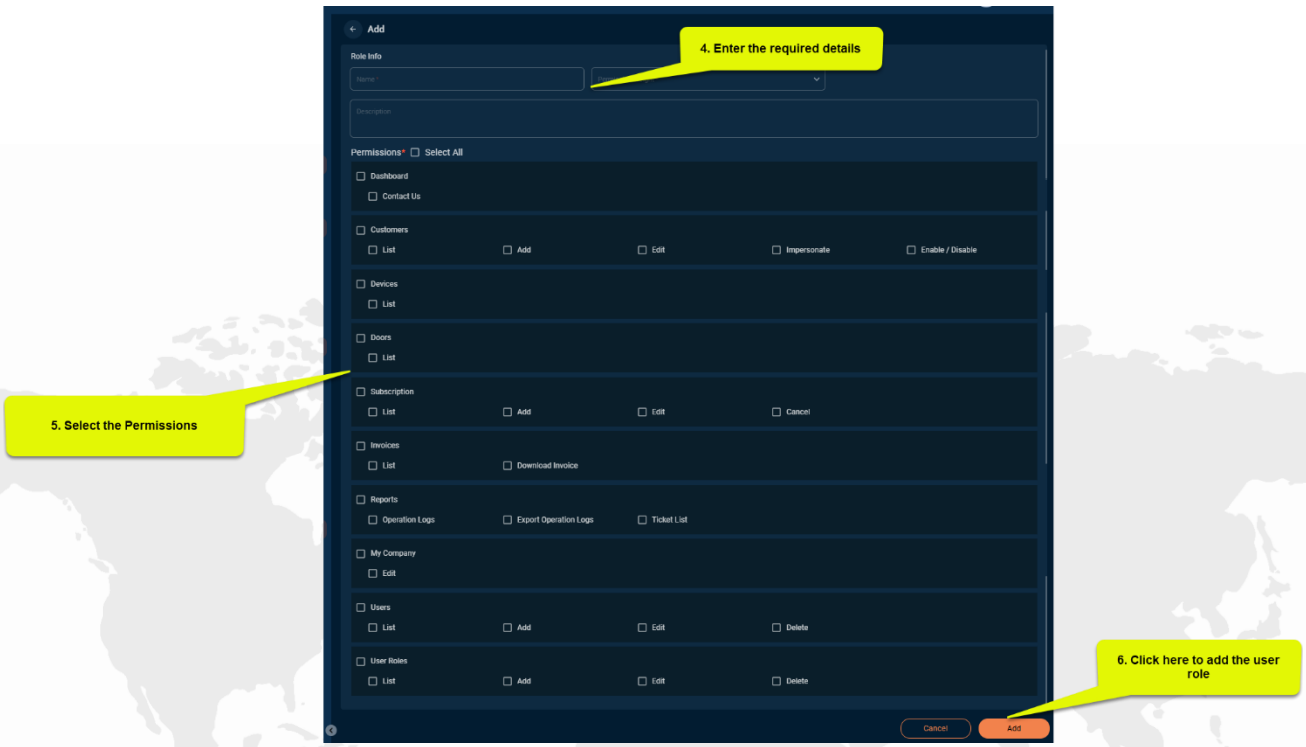

Name: Name the role.

Description: Enter the description name for the role.

Permissions: Under each module, select the permissions for the user by selecting the corresponding checkboxes. Only the corresponding user can use the selected options. If the user wants to select all the options, select the Master checkbox.

Edit a User Role

Edit a User Role, perform the following steps:

1. Select the role in the user role list and click the edit icon.
2. Edit the required details in the user role and click save.

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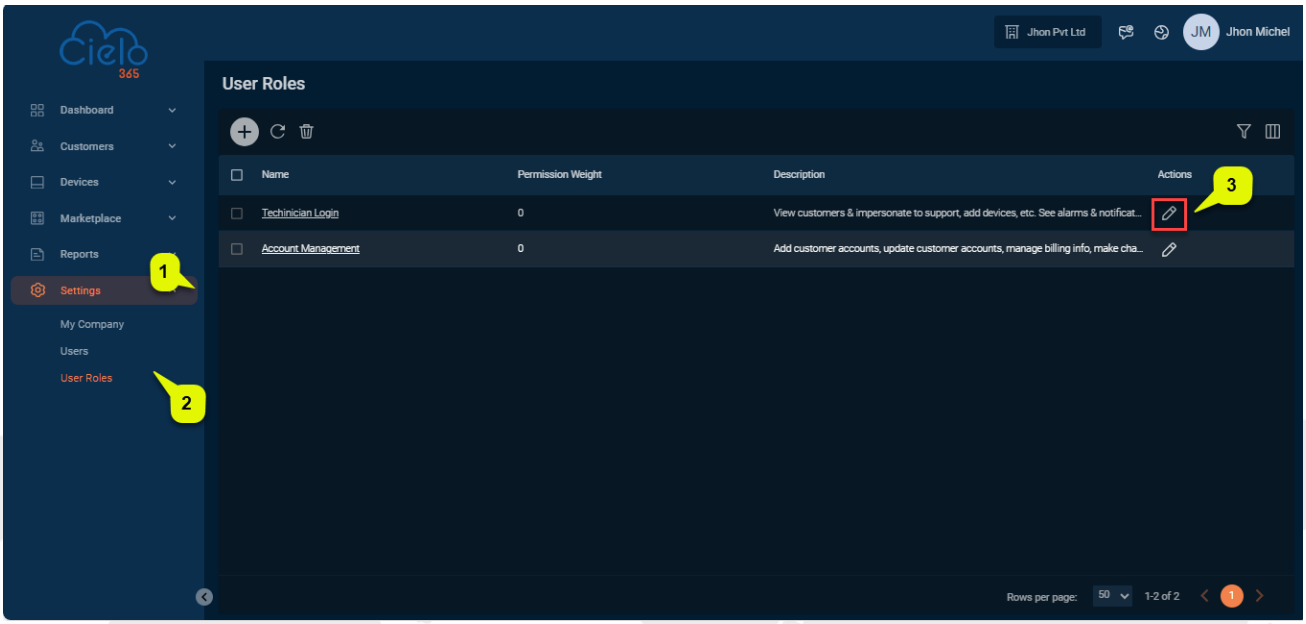

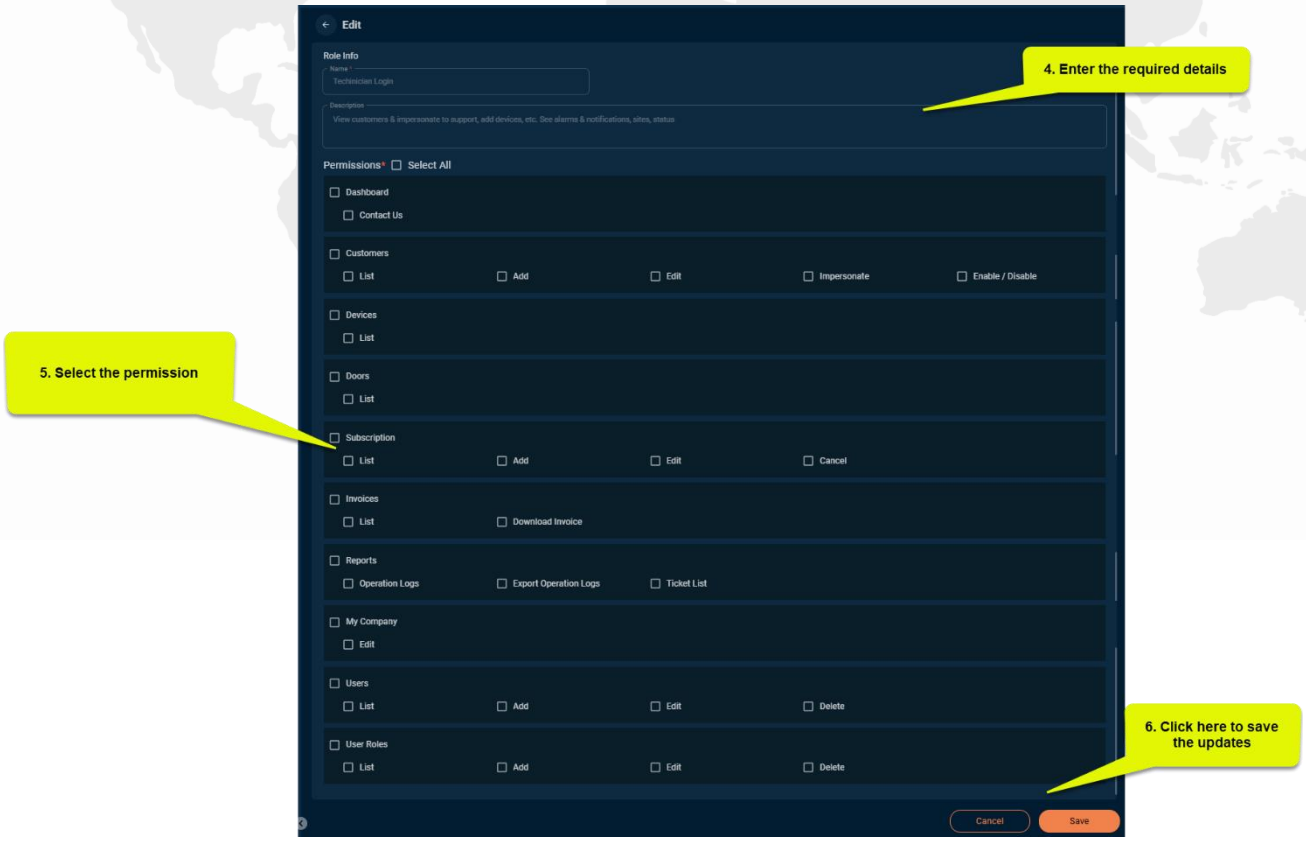

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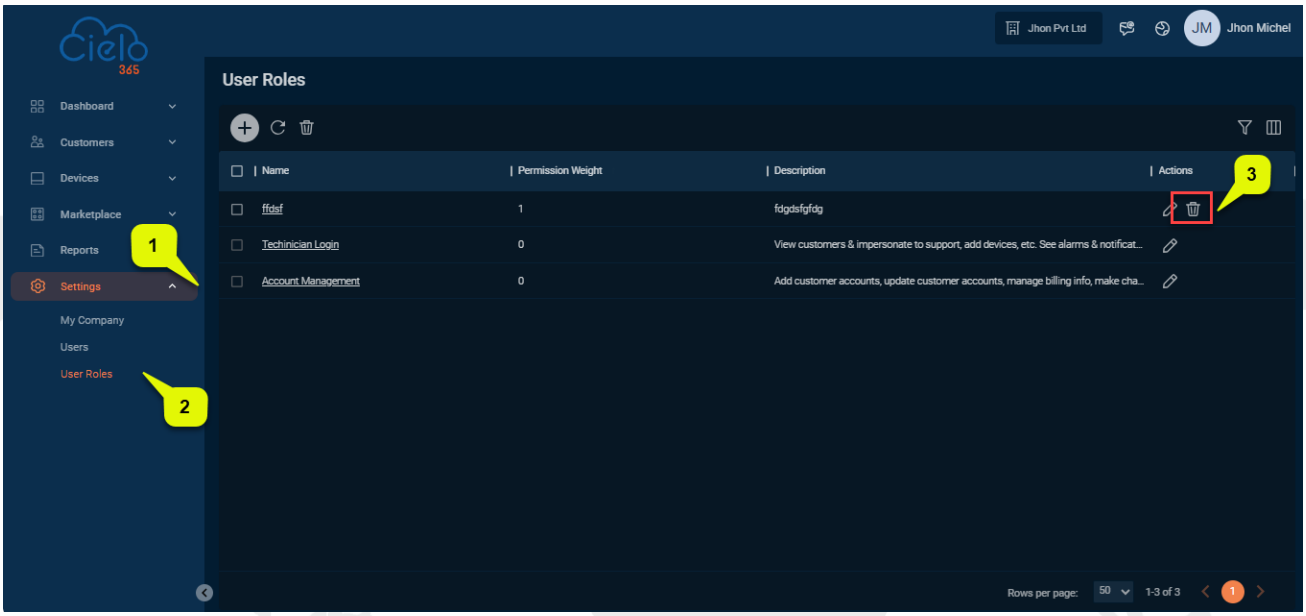
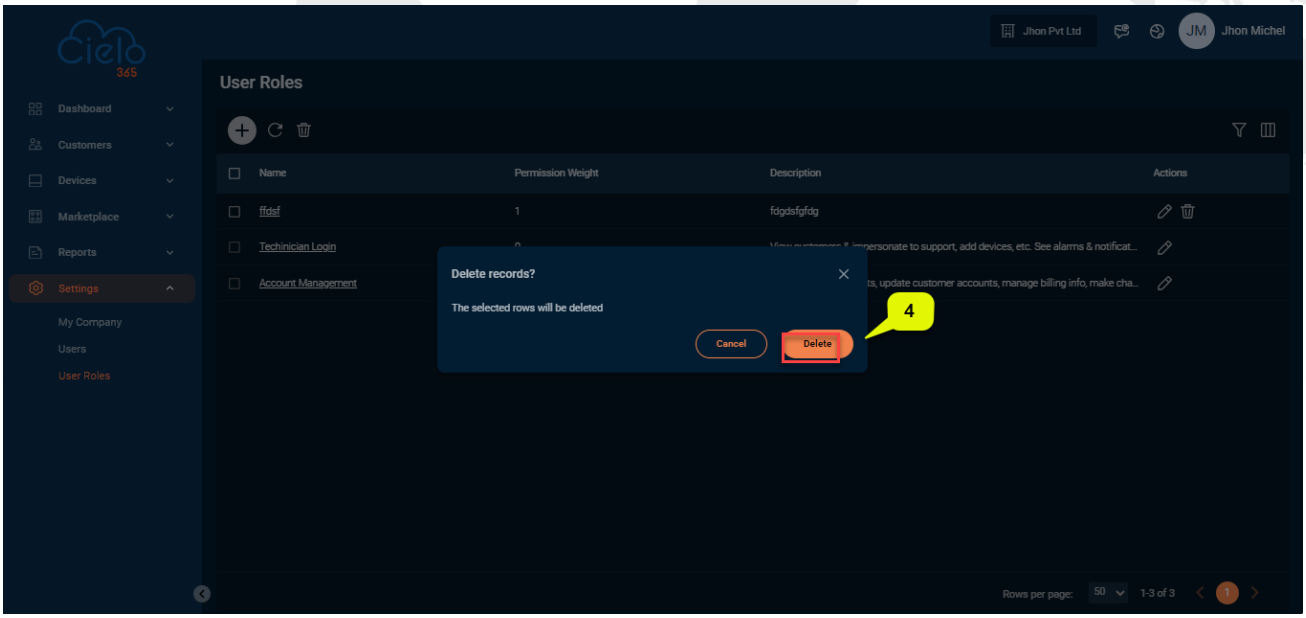
Delete a User Role

1. In the user role list, select the role to be deleted and click **Delete**.
2. On the pop-up that appears, confirm the deletion of the selected user role.





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