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# How to Update Details and Set Availability Via the Cougar portal

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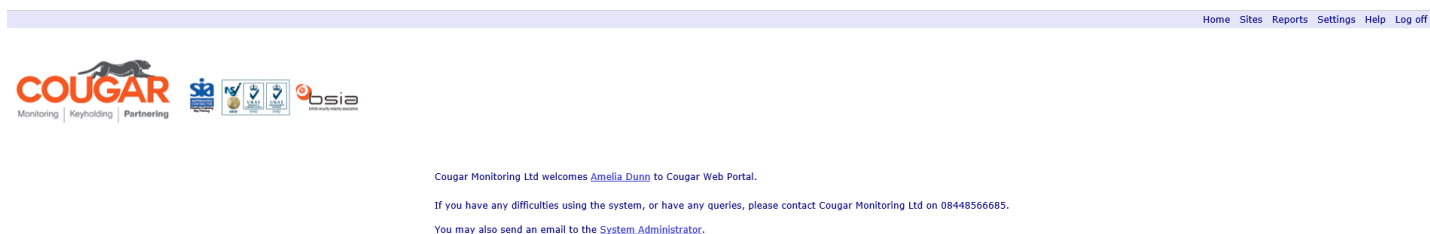


## How To Update Details And Set Availability Via The Cougar Portal

Please note all times need to be input using the 24-hour clock with : between. I.e. 09:00 – 17:00. If you need to set a time from midnight to midnight you do this as 00:00 – 23:59.

You need to log into the **Portal** using your own **Credentials**. If you are unsure what these are or require a reset please email across to **Arc@CougarMonitoring.com**. Please provide your current information if a reset is required.

Once you have logged into the **Portal** you will be met with this screen:



**Please Note** – Depending on your access level you may find your view of the Portal and the tabs available is slightly different, you may have less options or only be able to read certain sections of the account. If you require access to a part of the Portal that is currently inaccessible to you please email **Arc@CougarMonitoring.com** for assistance.

Last updated 15.03.2021  
Author: Amelia Dunn

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**Portal Training Guide –  
Updating Key Holders and Setting Availability.**

Click on the **Contract Number** that you are wanting to update and it will bring up the following screen:



From this screen you will be able to see all the information that is currently set up for the account.

For this training guide we will be focusing on updating and setting availability for **Key Holders**.

There are 2 main tabs you will be interested in for this

one;

**Customer Contacts** – This refers to the **Contact Details** for the **Key Holders**.

**Site Contacts** – This refers to the contact numbers for the **Site** itself, so a site phone.

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General | Customer Contacts | **Site Contacts** | Special Instructions | Transmitters | Areas | Agencies | Devices | Alarms | Conversions | User Defined | History | URNs

Site Status	Description	Phone Number	Area	Edit	Delete
Unknown	DIG TEM	0138 411 1111			

Site Status: Unknown  
 Line Status: OK  
 Alarm Status: Unknown  
 Test Status: Not On-Test  
 Commissioned: Not Commissioned

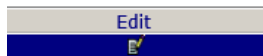
Installer: Cougar Monitoring  
 Branch: Cougar Monitoring  
 Link Account: Not Set  
 Customer Group: Not Set  
 Key Service: Not provided  
 Audible Alarm: None  
 Template Site: No

General | Availability

Description:  Phone Number:

As you can see we have a **Site Number** set up of 0138 411 1111.

In order to change this we click on the **Edit** button:



And then amend the information below making sure to click **Update** once completed:

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Kings Technology Centre Unit 1-2 Sapcote Trading Centre Powke Lane, Cradley Heath B64 5QR T: 0333 222 9099	4 St Dunstons Technology Park Bradford   BD4 7HH T: 0330 678 0635	Unit 6 Pickering House Netherton Road Netherton Industrial Estate Wishaw   ML2 0EQ T: 01698 355 111	Argento House 12 Progress Park Ribocon Way Luton   LU4 9UR T: 01582 412 000
<a href="mailto:info@cougarmonitoring.com">info@cougarmonitoring.com</a>   <a href="http://www.cougarmonitoring.com">www.cougarmonitoring.com</a>			

## Portal Training Guide – Updating Key Holders and Setting Availability.

General | Availability

Description Site Phone Number 01384 111 111

Add Contact Update Cancel

General | Customer Contacts | Site Contacts | Special Instructions | Transmitters | Areas | Agencies | Devices | Alarms | Conversions | User Defined | History | URNs

Site Status	Description	Phone Number	Areas	Edit	Delete
Unknown	Site	0138 411 1111			

Line Status  
Line OK

Alarm Status  
Unknown

Test Status  
Not On-Test

Commissioned  
Not Commissioned

Installer  
Cougar Monitoring

Branch  
Cougar Monitoring

Link Account  
Not Set

Customer Group  
Not Set

Key Service  
Not provided

Audible Alarm  
None

Template Site  
No

General | Availability

Description Site Phone Number 0138 411 1111

Add Contact Update Cancel

If we have a **Site Number** that can only be contacted between set times we can change the **Availability**:

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## Portal Training Guide – Updating Key Holders and Setting Availability.

General | Availability

Description Site Phone Number 0138 411 1111

Add Contact Update Cancel

General | Availability

Availability Status Permanent Every Day: Between entered dates:

Dates: From To

Times: From To

Update Cancel

As you can see at the moment this **Site Number** is set to always be **Available**. However if we want to set this to be **Unavailable** for a set period of time we would select **Temporary Unavailable** from the drop-down list under **Permanent**. You can then choose if this will be a daily availability or one for set dates.

We have selected **Between Entered Dates**.

Input the times you do **NOT** want the phone number to be **Available** for. We have used 08:00 – 17:00. (If you want this to be **Unavailable** for the whole day input 00:00 – 23:59).

To select the dates click on the Green box with the three  and this will bring up a pop up with a calendar:

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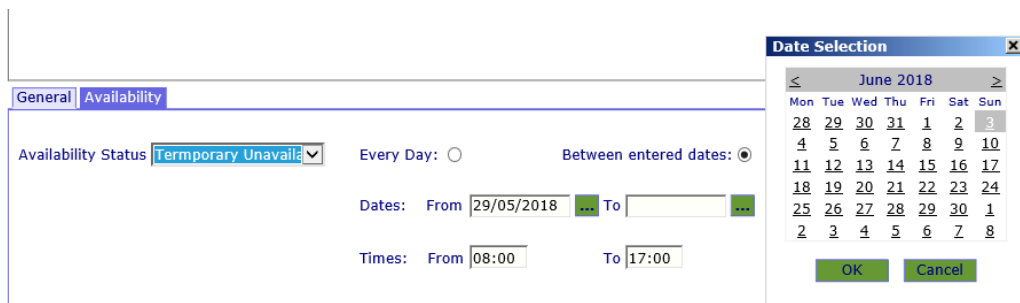
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## Portal Training Guide – Updating Key Holders and Setting Availability.



General Availability

Availability Status: **Temporary Unavail** | Every Day:  | Between entered dates:

Dates: From 29/05/2018 To

Times: From 08:00 To 17:00

Date Selection: June 2018

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

OK Cancel

Select your first date and click **OK**, then do the same to select the end date. Remember to click **Update** on the bottom right to get this updated.

If we want to set this so the **Site Number** is only **Available** during the sites opening hours we can do as well.

Here we select **Temporary** from the drop-down menu and select **Every Day**. We do not need to enter dates for this one just the times. We have set our **Site Number** to only be **Available** during 08:00 – 17:00 daily:

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## Portal Training Guide – Updating Key Holders and Setting Availability.

General | **Availability**

Availability Status:  Every Day:  Between entered dates:

Dates: From  To

Times: From  To

If we now navigate to the **Customer Contacts** you will see this is set up slightly differently:

***Please Note*** – If you customer has provided Keysafe details or Medical Information then this is where you need to add this information. Create a Keyholder called Keysafe Code and one called Medical Information, then in the Notes section of that Keyholder input the relevant information for our Operators. If you need to input a contact number in order to save the Keyholder then please just use '00000'.

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Group	Area	Edit	Del
<All Contacts>			
1 - Main Key Holder Group	All areas	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Name	Numbers	Permissions	Priority	Group	Edit	Del
KH 1	T:0138 422 2222 T:0138 433 3333 M:01384 444 444		01	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
KH2			02	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>

General | Availability | Notes

Contact Name	<input type="text"/>	Email	<input type="text"/>	<input type="checkbox"/> Key Holder
Work Phone	<input type="text"/> Priority 2	Password	<input type="text"/>	<input type="checkbox"/> Cancel Alarms
Home Phone	<input type="text"/> Priority 1	Duress Code	<input type="text"/>	<input type="checkbox"/> Edit Keyholders
Mobile Phone	<input type="text"/> Priority 3	Panel User number	<input type="text"/>	<input type="checkbox"/> Edit Schedules
Pager Number	<input type="text"/> Priority 4	Global Contact	<input type="checkbox"/>	<input type="checkbox"/> Edit Site Data
Pager Window	<input type="text"/>			

As you can see I have already set up two **Key Holders**. This shows that **KH 1** has three numbers assigned to them whereas **KH2** currently has none.

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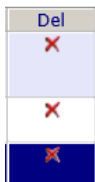
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Firstly we will set up a third **Key Holder**.

If you need to delete any information you do this by clicking the **Red Cross** in the **Del** column:



(On this page we do not use the **Global Contacts** button at the bottom).

Click the **Add Contact** button at the bottom:



This will allow us to input the required information:

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General	Availability	Notes
Contact Name	<input type="text"/>	
Work Phone	<input type="text"/> Priority 2 <input type="button" value="v"/>	Email
Home Phone	<input type="text"/> Priority 1 <input type="button" value="v"/>	Password
Mobile Phone	<input type="text"/> Priority 3 <input type="button" value="v"/>	Duress Code
Pager Number	<input type="text"/> Priority 4 <input type="button" value="v"/>	Panel User number
Pager Window	<input type="text"/>	Global Contact
		<input type="checkbox"/>
		Key Holder <input type="checkbox"/>
		Cancel Alarms <input type="checkbox"/>
		Edit Keyholders <input type="checkbox"/>
		Edit Schedules <input type="checkbox"/>
		Edit Site Data <input type="checkbox"/>
<input type="button" value="Add Contact"/>	<input type="button" value="Global Contacts"/>	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

We need to enter at the very least the **Contact Name** and one **Contact Number**. However the more information we are provided the better it is for the **ARC Team**, as we will have more opportunities to contact the **Key Holders**.

For this I have input:

**Customer Name** – This is the name of the **Key Holder** we are contacting. Please provide a first name and surname where possible rather than just an initial.

**Home Number** – This is the **Home Number** for this particular **Key Holder**. This is usually a **Landline**.

**Mobile Number** – This is the **Mobile Number** for this particular **Key Holder**.

**Email** – This is the **Email Address** for this particular **Key Holder**.

**Password** – This is an **All OK Password** for this particular **Key Holder** that they should quote to us should they be on **Site**, or if they call in to ourselves.

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**Duress** – This is a **Duress** password for this particular **Key Holder**. This should only ever be quoted to ourselves when they **Key Holder** is in a situation where they require further assistance.

Most Key Holders won't have a **Duress** password but it is always worth asking them to set up an **All Ok Password** to increase the **Security** of the account.

You will also see I have ticked all of the boxes on the right:

General		Availability		Notes	
Contact Name	John Smith	Email	John.Smith@JohnSmith.com	<input checked="" type="checkbox"/> Key Holder	<input checked="" type="checkbox"/>
Work Phone	<input type="text"/>	Password	John	<input checked="" type="checkbox"/> Cancel Alarms	<input checked="" type="checkbox"/>
Home Phone	01384 555 555 <input type="text"/> Priority 2 <input type="text"/>	Duress Code	Smith	<input checked="" type="checkbox"/> Edit Keyholders	<input checked="" type="checkbox"/>
Mobile Phone	01384 666 666 <input type="text"/> Priority 1 <input type="text"/>	Panel User number	<input type="text"/>	<input checked="" type="checkbox"/> Edit Schedules	<input checked="" type="checkbox"/>
Pager Number	<input type="text"/> Priority 3 <input type="text"/>	Global Contact	<input type="checkbox"/>	<input checked="" type="checkbox"/> Edit Site Data	<input checked="" type="checkbox"/>
Pager Window	<input type="text"/> Priority 4 <input type="text"/>				

**Key Holder** – Ticking this confirms that this contact is a **Key Holder**.

**Cancel Alarms** – Ticking this confirms that this contact is authorised to cancel alarms.

**Edit Key Holders** – Ticking this confirms that this contact is authorised to edit the **Key Holder** list.

**Edit Schedules** – Ticking this confirms that this contact is authorised to **Edit** the site schedule.

**Edit Site Data** - Ticking this confirms that this contact is authorised to **Edit** the site data, address etc.

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Portal Training Guide –  
Updating Key Holders and Setting Availability.

Make sure to click **Save** and you will see that your new **Key Holder** is showing in the list:

Groups (+ add group)				Contacts						
Group	Area	Edit	Del	Name	Numbers	Permissions	Priority	Group	Edit	Del
<All Contacts>										
1 - Main Key Holder Group	All areas			KH 1	T:0138 422 2222 T:0138 433 3333 M:01384 444 444		01	1		
				KH2			02	1		
				John Smith	T:0138 455 5555 M:01384 666 666		03	1		

General		Availability		Notes	
Contact Name	John Smith	Email	John.Smith@JohnSmith.com		Key Holder <input checked="" type="checkbox"/>
Work Phone		Password	JOHN		Cancel Alarms <input checked="" type="checkbox"/>
Home Phone	0138 455 5555	Duress Code	Smith		Edit Keyholders <input checked="" type="checkbox"/>
Mobile Phone	01384 666 666	Panel User number			Edit Schedules <input checked="" type="checkbox"/>
Pager Number		Global Contact	<input type="checkbox"/>		Edit Site Data <input checked="" type="checkbox"/>
Pager Window					

[Add Contact](#) [Global Contacts](#) [Update](#) [Cancel](#)

The new **Key Holder** will always appear bottom of the list. In order to change this you click once on the **Key Holder**, this will highlight it, then click on the arrow in the **Priority** column, either up or down depending on where you need to move them to:

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**Portal Training Guide –  
Updating Key Holders and Setting Availability.**

Priority
01
02
03

As you can see we have now moved **John Smith** to the second **Key Holder** place.

**Contacts**

Name	Numbers	Permissions	Priority	Group	Edit	Del
KH 1	T:0138 422 2222 T:0138 433 3333 M:01384 444 444		01	1		
John Smith	T:0138 455 5555 M:01384 666 666		02	1		
KH2			03	1		

If we want to **Edit** one of the **Key Holders** we click on the **Edit** button to the right of that **Key Holder**:

<b>Edit</b>

This will bring up the information we have for that **Key Holder** underneath where we've just set the new **Key Holder** up.

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Set Status	Groups (+ add group)	Area	Edit	Del	Contacts	Numbers	Permissions	Priority	Group	Edit	Del
Unknown	<All Contacts>				KH 1	T:0138 422 2222 T:0138 433 3333 M:01384 444 444		01	1		
Line OK	1 - Main Key Holder Group	All areas			John Smith	T:0138 455 5555 M:01384 666 666		02	1		
Alarm Status					KH2			03	1		
Unknown											
Test Status											
Not On-Test											
Commissioned											
Not Commissioned											
Installer											
Cougar Monitoring											
Branch											
Cougar Monitoring											
Link Account											
Not Set											
Customer Group											
Not Set											
Key Service											
Not provided											
Audible Alarm											
None											
Template Site											
No											

General | Availability | Notes

Contact Name	KH 1		Email	kh1@cougarmonitoring.com		Key Holder	<input checked="" type="checkbox"/>
Work Phone	0138 433 3333	Priority	2	Password	PASSWORD1	Cancel Alarms	<input checked="" type="checkbox"/>
Home Phone	0138 422 2222	Priority	1	Duress Code		Edit Keyholders	<input checked="" type="checkbox"/>
Mobile Phone	01384 444 444	Priority	3	Panel User number		Edit Schedules	<input checked="" type="checkbox"/>
Pager Number		Priority	4	Global Contact	<input type="checkbox"/>	Edit Site Data	<input checked="" type="checkbox"/>
Pager Window							

Here we can **Update** the details for **KH 1**. We are going to set the **Availability** for this **Key Holder**.

This will bring up a different box to the **Site Availability**:

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## Portal Training Guide – Updating Key Holders and Setting Availability.

General | **Availability** | Notes

Allow operator contact if all available contacts have been attempted

This person is normally **Available**

EXCEPT between these dates and times:

From Date	From Time	To Date	To Time	Delete
-----------	-----------	---------	---------	--------

At all other times this person:  
can be contacted at all times

Day	From	To	Delete
-----	------	----	--------

Here we can have much greater control over when each **Key Holder** is contacted. We can set them to be **Unavailable** for Holidays, or in the case of **Engineers** we can set their **Availability** for the next few months.

You will also notice there is a tick box “**Allow operator contact if all available contacts have been attempted**”. This should only be ticked in cases where the **Key Holder** is not available but is happy for the **ARC Team** to contact them should they be unable to get through to any of the **Available Key Holders**.

If we want to set this **Key Holder** as being **Unavailable** for a short period of time we leave them as normally **Available**:

Allow operator contact if all available contacts have been attempted

This person is normally **Available**

In order to add in the dates we click on the green **Add** button below the table and it will show the following:

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**Portal Training Guide –  
Updating Key Holders and Setting Availability.**

Allow operator contact if all available contacts have been attempted

This person is normally Available

EXCEPT between these dates and times:

From Date	From Time	To Date	To Time	Delete
				✘

You need to include the / on the Dates and the : for the times as below:

Allow operator contact if all available contacts have been attempted

This person is normally Available

EXCEPT between these dates and times:

From Date	From Time	To Date	To Time	Delete
21/05/2016	08:00	31/05/2016	17:00	✘

At all other times this person:

can be contacted at all times

Day	From	To	Delete

You can continue to add as many rows as needed. Simply click on the green **Add** button to add another row. Once done click **Update**.

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Portal Training Guide –  
Updating Key Holders and Setting Availability.

If any of the Key Holders are set to **Unavailable** on the date you are in the account it will show in the list like so:

**Contacts**

Name	Numbers	Permissions	Priority	Group	Edit	Del
 Jane Doe	T:0138 422 2222 T:0138 433 3333 M:01384 444 444		01 	1		
John Smith	T:0138 455 5555 M:01384 666 666		02 	1		

Here you can see **Jane Doe** is **Not Available** whereas **John Smith** is.

If you have a contact that is only **Available** between set times we do this on the box to the right:

At all other times this person:  
can only be contacted between

Day	From	To	Delete

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Portal Training Guide –  
Updating Key Holders and Setting Availability.

This is normally set to “**Can be contact at all times**”, however we have changed it to “**Can only be contacted between**”. In the box below we set the **Availability**. This is done by each day of the week. So if they can only be contacted between Monday – Friday 09:00 – 17:00 it will look like the below:

At all other times this person:

can only be contacted between ▾

Mon ▾	09:00	17:00	✗	^
Tue ▾	09:00	17:00	✗	
Wed ▾	09:00	17:00	✗	
Thur ▾	09:00	17:00	✗	
Fri ▾	09:00	17:00	✗	▾

Add

Update Cancel

You will see we have not selected Saturday and Sunday as this person is **Not Available** on those days so we don’t need to enter any information for this. Again make sure to click **Update**.

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Portal Training Guide –  
Updating Key Holders and Setting Availability.

Now we are going to set up one of the **Key Holders** as an 'Out Of Hours' contact only. So we click on **Edit** as above and navigate to **Availability**. We will leave them as normally **Available** but on the right we will set them to **“Cannot be contacted between”**.

At all other times this person:

cannot be contacted between ▾

Mon ▾	09:00	17:00	×
Tue ▾	09:00	17:00	×
Wed ▾	09:00	17:00	×
Thur ▾	09:00	17:00	×
Fri ▾	09:00	17:00	×

Add

Update Cancel

If we want to set up **Engineer Numbers** who work on a rotation, we set them up as a **Key Holder** as above and set their **Availability** to **Unavailable**.

Allow operator contact if all available contacts have been attempted

This person is normally **Unavailable** ▾

EXCEPT between these dates and times:

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**Portal Training Guide –  
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We can then add exceptions in below the same as we did for the holiday above. The dates we are going to enter will be the times when this Engineer is **Available** to be on call. So as above we keep clicking the green **Add** button and inputting the information until we have the availability input for this **Engineer**. Remember to click **Update**.

Allow operator contact if all available contacts have been attempted

This person is normally Unavailable ▼

EXCEPT between these dates and times:

From Date	From Time	To Date	To Time	Delete
29/05/2018	00:00	29/05/2018	23:59	✗
31/05/2018	00:00	31/05/2018	23:59	✗
02/06/2018	00:00	02/06/2018	23:59	✗

Add

As you can see the **From Date** and **To Date** are the same, this is because this **Engineer** is only on call one day at a time. If they were on call for a week we would set them from 29/05/2018 – 04/06/2018. The times will be from 00:00 to 23:59 as the **Engineer** is on call from midnight to midnight.

You can set whatever times and dates you require using this method.

Each individual **Engineer/ Key Holder** should be set up separately if they have their own **Contact Numbers**.

If you have one **Contact Number** that multiple **Engineers / Key Holders** use you can add this information in the **Notes** tab:

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General Availability Notes

Allow operator contact if all available contacts have been attempted

This person is normally Unavailable ▼

EXCEPT between these dates and times:

General Availability Notes

On call:  
29/05/2018 - Engineer 1  
30/05/2018 - Engineer 2  
31/05/2018 - Engineer 3  
01/06/2018 - 05/06/2018 - Engineer 1  
06/05/2018 - 12/06/2018 - Engineer 2

On the **Notes** tab you can add in any relevant information for that particular **Key Holder**. Remember though if they are **Unavailable** on set dates use the **Availability** tab to set this. This will prevent them from being contacted by the **ARC Team**.

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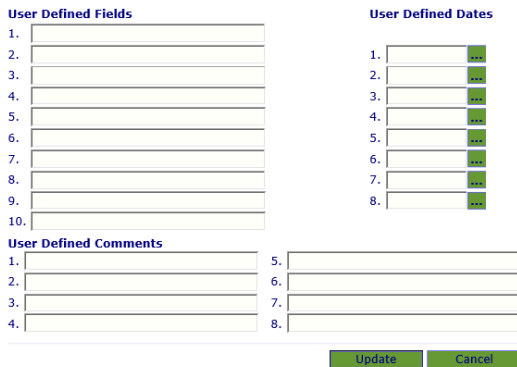
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## Portal Training Guide – Updating Key Holders and Setting Availability.

Once you have finished updating the account you need to add this information in the **User Defined** section:



Here we are going to update the **User Defined Comments** and **User Defined Dates**:



The screenshot shows two sections: 'User Defined Fields' and 'User Defined Dates'. 'User Defined Fields' has 10 empty text input boxes. 'User Defined Dates' has 8 empty date pickers, each with a green calendar icon. Below these is the 'User Defined Comments' section with 8 empty text input boxes. At the bottom are 'Update' and 'Cancel' buttons.

In the **User Defined Comments** we need to input why we have updated the account. For this one we will input it is a Key Holder update.

### User Defined Comments

1.

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**Portal Training Guide –  
Updating Key Holders and Setting Availability.**

Make sure you only ever update the number **1** field for both. To update the **User Defined Dates** you need to click on the 3  and this will bring a calendar pop up for you to select the date:

User Defined Dates		Date Selection																																																	
1.	11/06/2018 	<div style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;">June 2018</p> <table border="1" style="width: 100%; text-align: center;"> <thead> <tr> <th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th><th>Sun</th> </tr> </thead> <tbody> <tr> <td>28</td><td>29</td><td>30</td><td>31</td><td>1</td><td>2</td><td>3</td> </tr> <tr> <td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td> </tr> <tr> <td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td> </tr> <tr> <td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td> </tr> <tr> <td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>1</td> </tr> <tr> <td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td> </tr> </tbody> </table> <p style="text-align: center;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </p> </div>	Mon	Tue	Wed	Thu	Fri	Sat	Sun	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4	5	6	7	8
Mon	Tue		Wed	Thu	Fri	Sat	Sun																																												
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8.	<input type="text"/> 																																																		

Click **OK** and then **Update** to save this information. By updating this field every time you update the account you can see at a glance when it was last updated and why.

If you require any further information on the above, please contact us at [Arc@CougarMonitoring.com](mailto:Arc@CougarMonitoring.com)

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