

1. Getting Started Portal Guide.....1

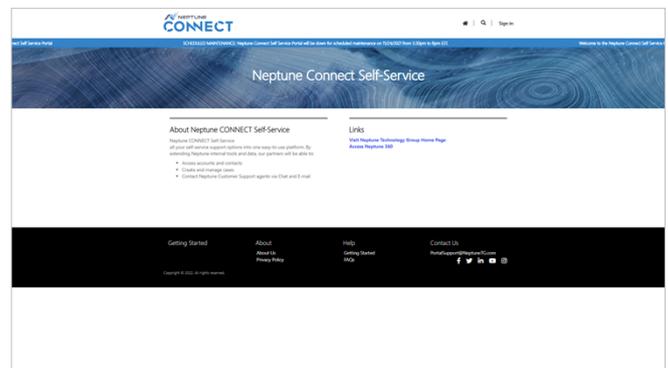
1. Getting Started Portal Guide

Welcome to the Neptune Connect Self-Service Customer Portal Pilot!

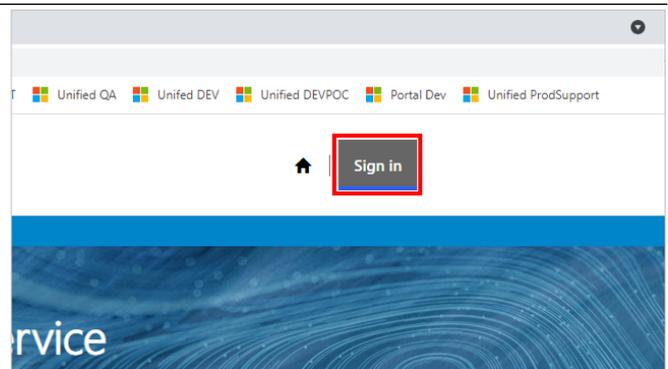
Through this training documentation you will find information to help you navigate inside the portal. The topics covered in the document include:

- Signaling in with a temporary password
- The User Profile page
- The Parent Account page
- Accounts
- Contacts
- Cases
- FAQs
- About Us
- Contact Us

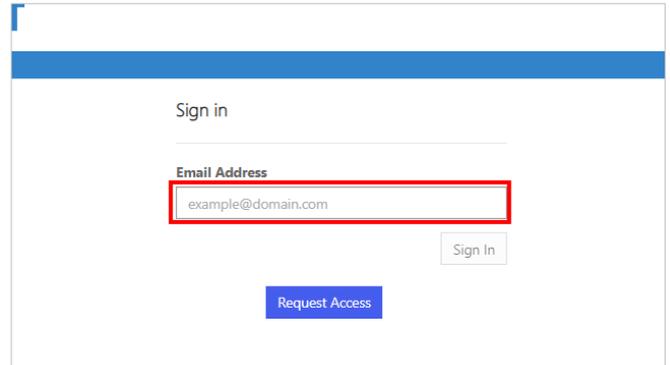
Use the provided Neptune Connect URL in your browser to navigate to the Neptune Connect Landing page.



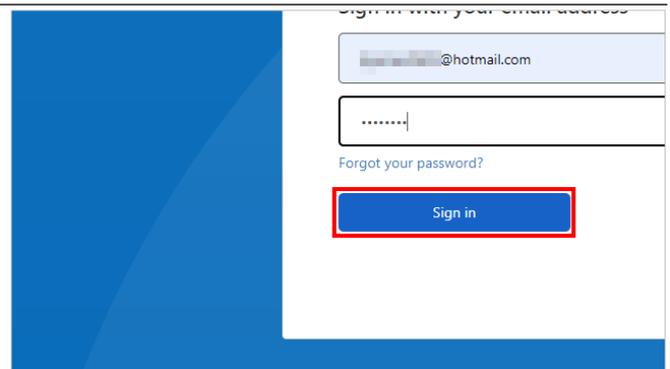
Click on the link **Sign in** to authenticate.



Enter the **Email Address**.

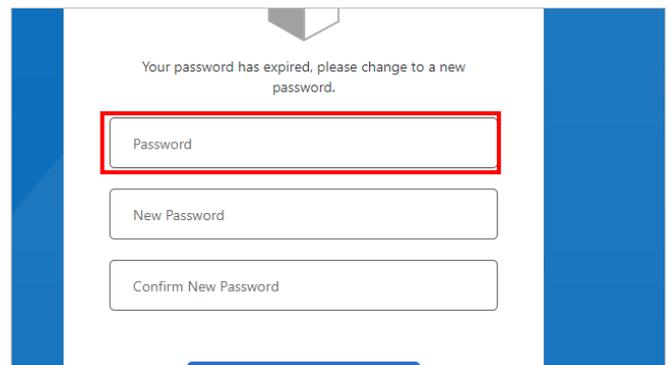


Use your designated Email and Temporary password to *Sign in*.

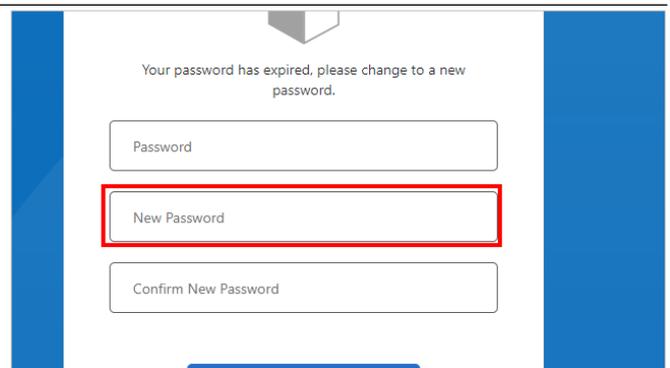


Users will be prompted that the password has Expired and a new password must be created.

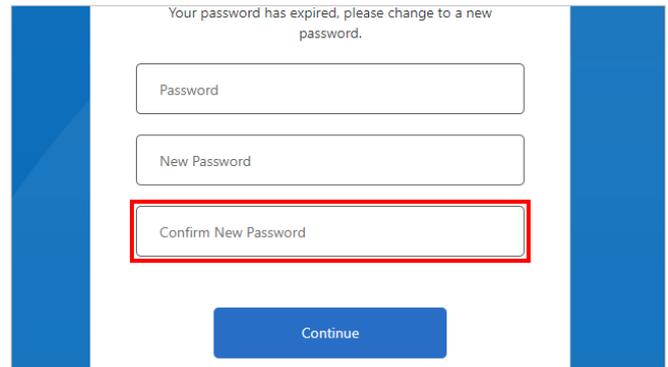
Enter the temporary password in the *Password* field.



Click on the *New Password* field to create a new password.



Validate the new password in the *Confirm New Password* button.

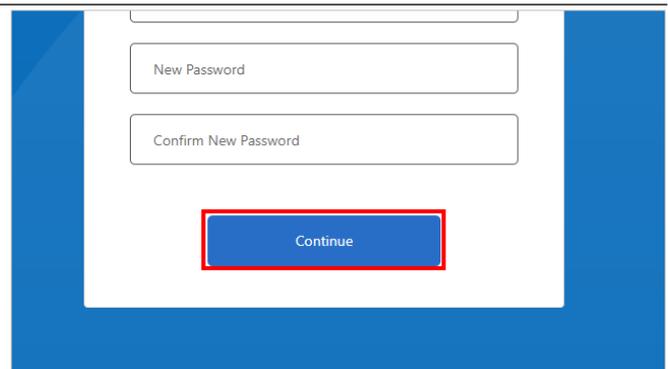


Your password has expired, please change to a new password.

Form fields: Password, New Password, Confirm New Password (highlighted with a red box).

Continue button.

Click **Continue**.

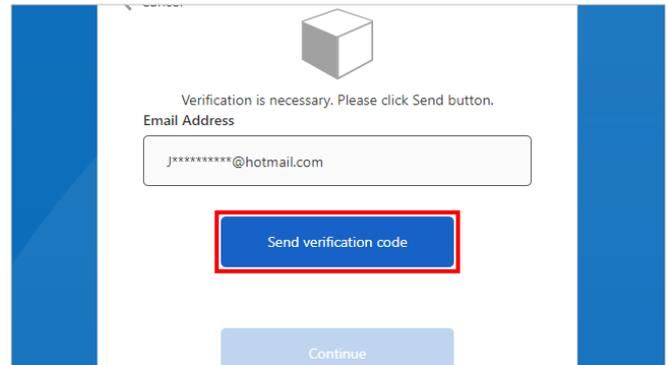


Form fields: New Password, Confirm New Password.

Continue button (highlighted with a red box).

In order to complete the new password creation users will be prompted to verify their account with their Email Address.

Click on the button **Send verification code**.



Verification is necessary. Please click Send button.

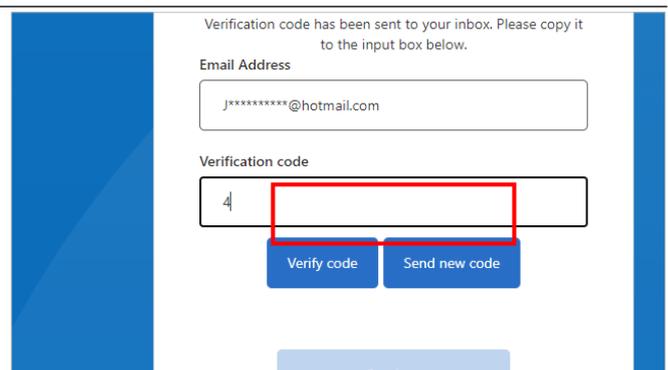
Email Address: j*****@hotmail.com

Send verification code button (highlighted with a red box).

Continue button.

You will receive an email to verify your email address.

Once received, enter the **Verification code**.



Verification code has been sent to your inbox. Please copy it to the input box below.

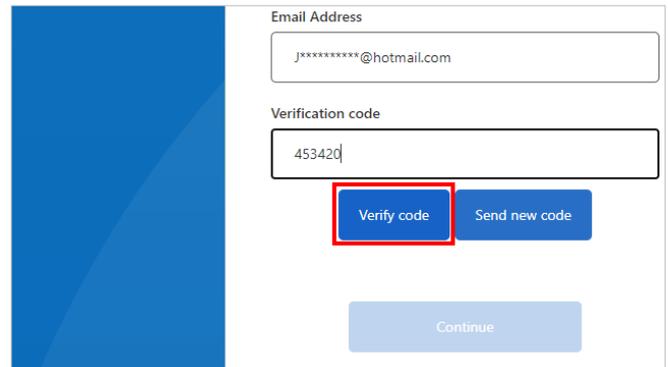
Email Address: j*****@hotmail.com

Verification code: 4 [] (the empty box is highlighted with a red box)

Verify code, Send new code buttons.

Continue button.

Click on the button **Verify code**.



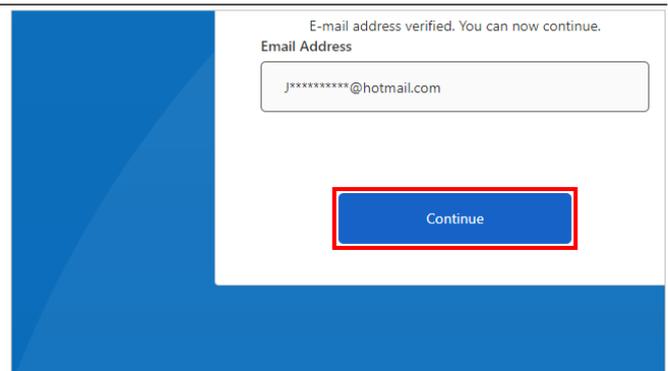
Email Address
j*****@hotmail.com

Verification code
453420

Verify code Send new code

Continue

Click on the button **Continue**.

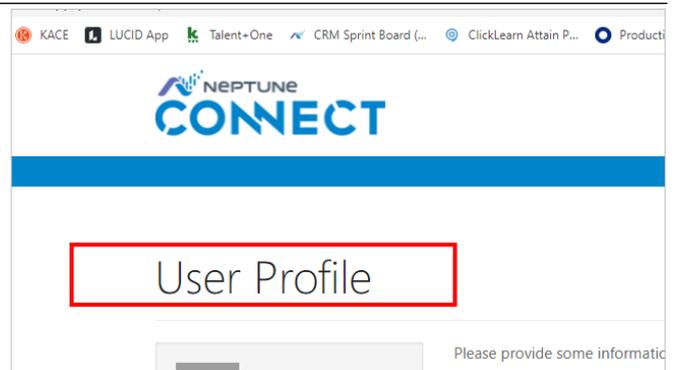


E-mail address verified. You can now continue.

Email Address
j*****@hotmail.com

Continue

You will be automatically signed into the Customer Portal and land on the **User Profile** web page.



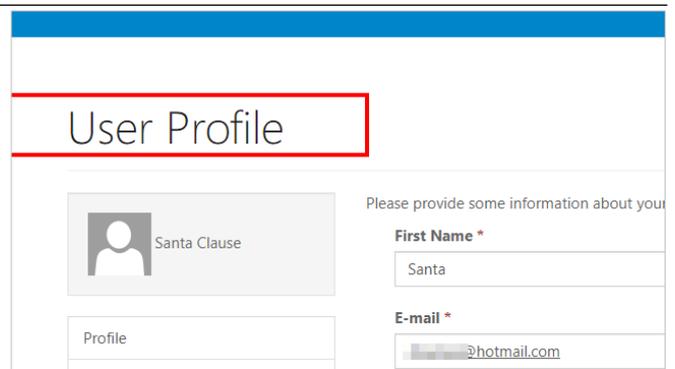
KACE LUCID App Talent+One CRM Sprint Board (...) ClickLearn Attain P... Product

NEPTUNE CONNECT

User Profile

Please provide some informati

On the User Profile page, your contact information can be viewed and updated.



User Profile

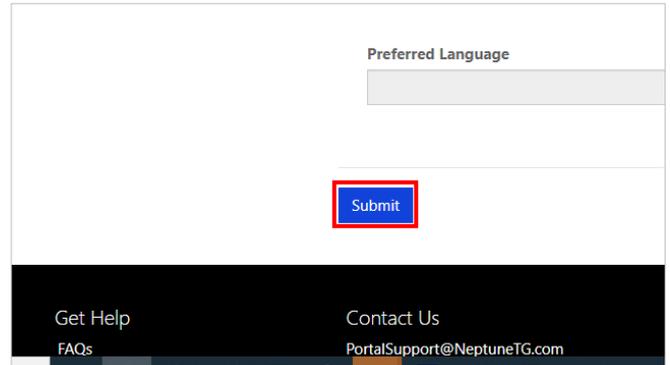
Please provide some information about your

Profile Santa Clause

First Name *
Santa

E-mail *
@hotmail.com

Click on the button **Submit** to save any updated information.



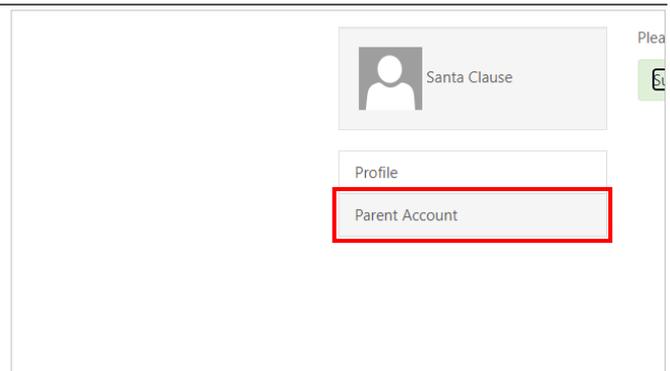
Preferred Language

Submit

Get Help
FAQs

Contact Us
PortalSupport@NeptuneTG.com

Click on the link **Parent Account** to see your Parent Account information.

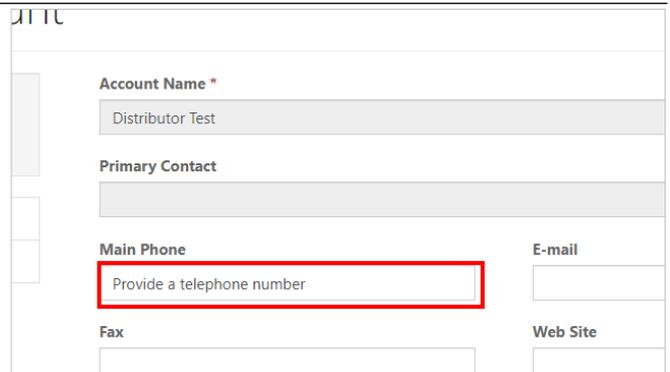


Santa Clause

Profile

Parent Account

On the Parent Account page, Account select account information can be updated.



Account Name *

Distributor Test

Primary Contact

Main Phone

Provide a telephone number

E-mail

Fax

Web Site

Click on the button **Submit** to update any changes made.



Full Name ↑

Jazmine James

Jessica James

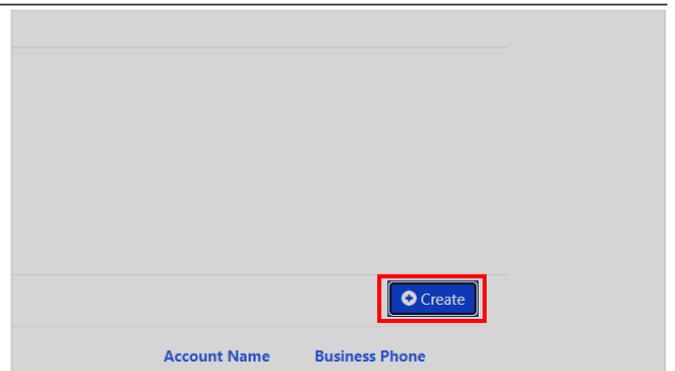
Santa Clause

Submit

Account Contacts are also listed on the Parent Account web page.

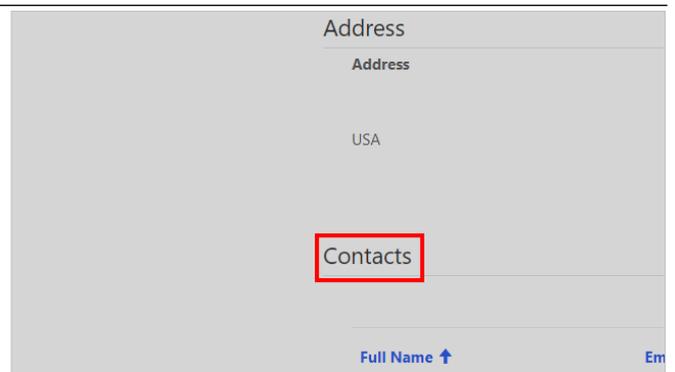


Click on the link **Create** to add new contact to the system..



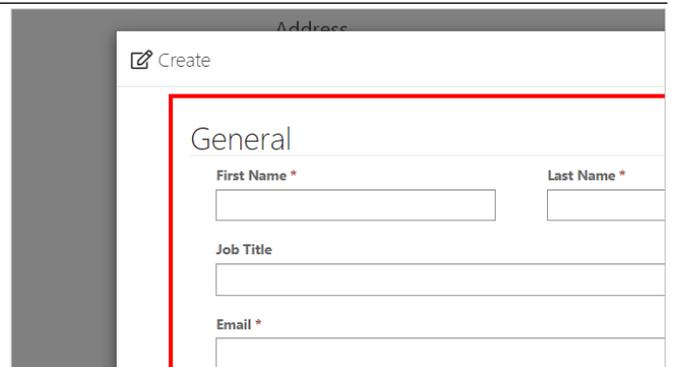
Duplicate contacts are not allowed in system. A contact is considered a duplicate under the following circumstances:

- * No two Contacts can have the same Email Address and Full Name
- * No two Contacts can have the same Business Phone and Full Name
- * No two Contacts can have the Same Full Name & Account Name

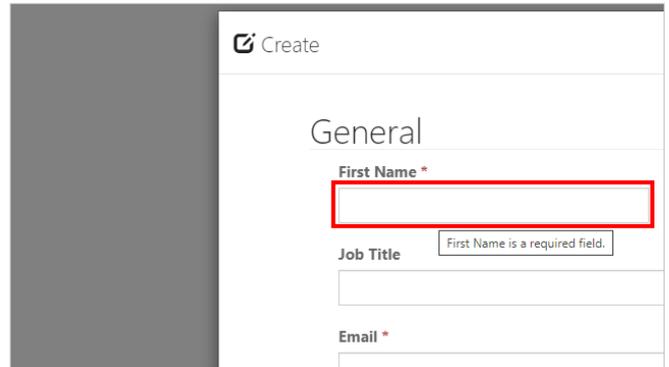


Enter the *contact information* for the new contact.

Be sure to fill out all the required fields with the red asterisk (*).



Enter the **First Name**.



Create

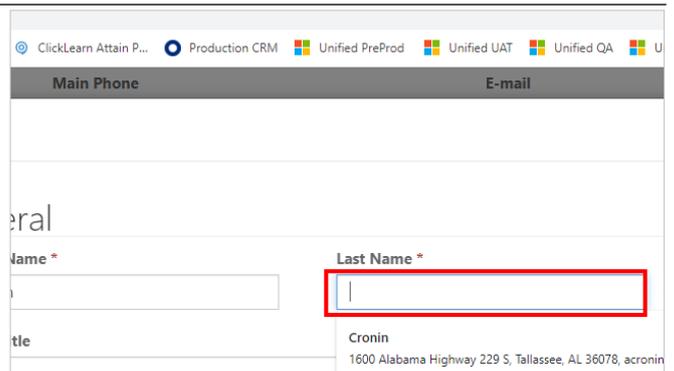
General

First Name *

Job Title

Email *

Enter the **Last Name**.



ClickLearn Attain P... Production CRM Unified PreProd Unified UAT Unified QA U

Main Phone E-mail

General

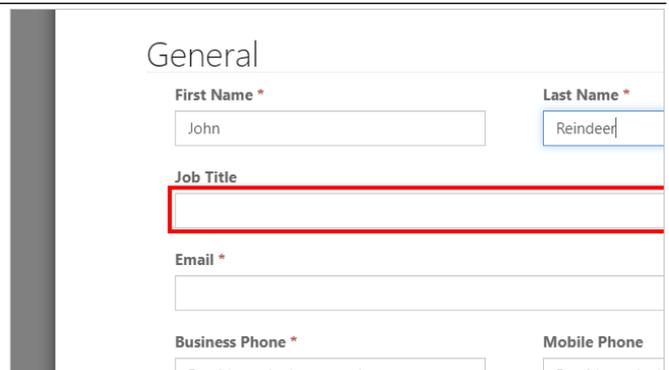
Name *

Last Name *

Job Title

Cronin
1600 Alabama Highway 229 S, Tallassee, AL 36078, acronin

Enter the **Job Title** (optional).



General

First Name * John

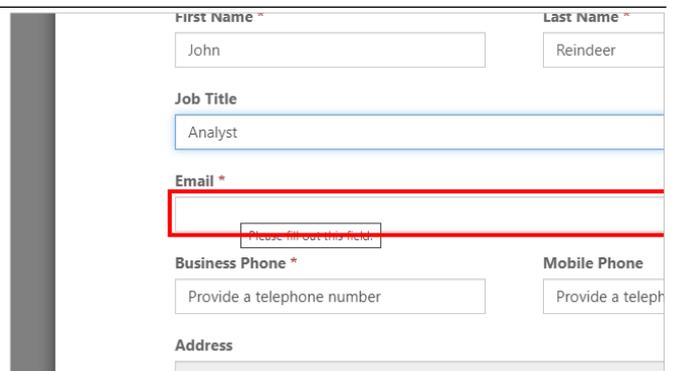
Last Name * Reindeer

Job Title

Email *

Business Phone * Mobile Phone

Enter the **Email Address**.



First Name * John

Last Name * Reindeer

Job Title Analyst

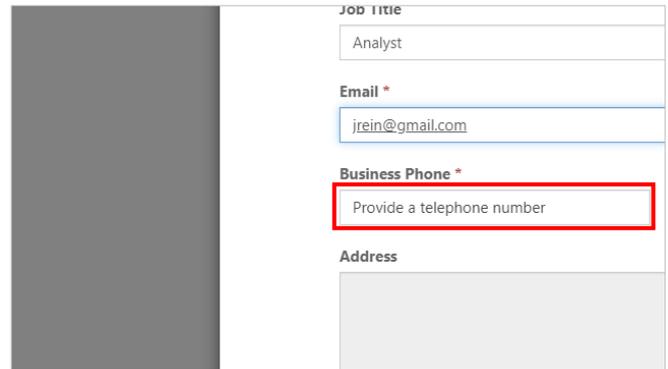
Email *

Business Phone * Provide a telephone number

Mobile Phone Provide a teleph

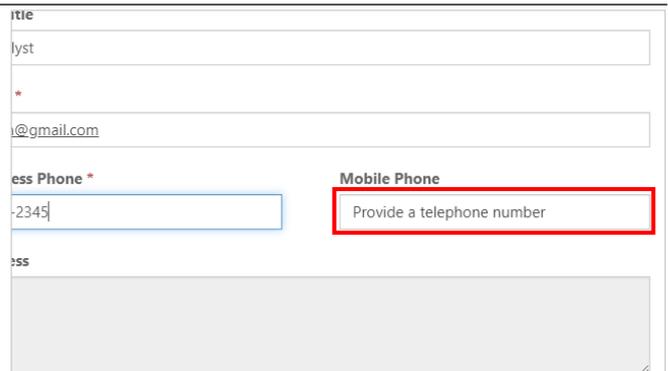
Address

Enter the **Business Phone** number.



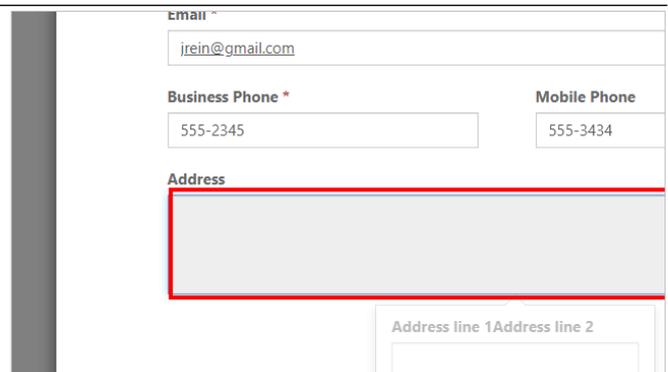
The screenshot shows a contact form with the following fields: Job Title (Analyst), Email (* jrein@gmail.com), Business Phone (* Provide a telephone number), and Address. The Business Phone field is highlighted with a red border.

Enter the **Mobile Phone** Number (optional).



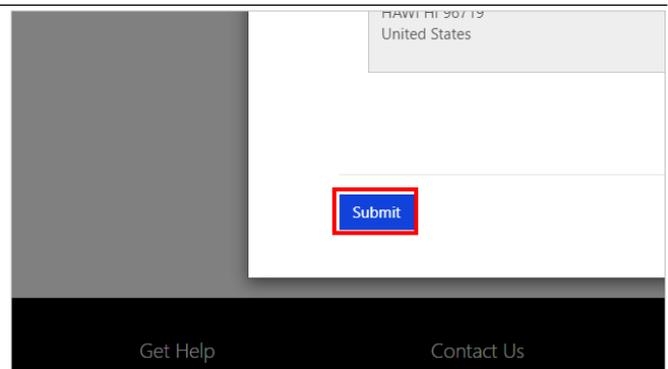
The screenshot shows a contact form with the following fields: Job Title (Analyst), Email (* jrein@gmail.com), Business Phone (* -2345), Mobile Phone (Provide a telephone number), and Address. The Mobile Phone field is highlighted with a red border.

Enter contact's **Address** information (optional).



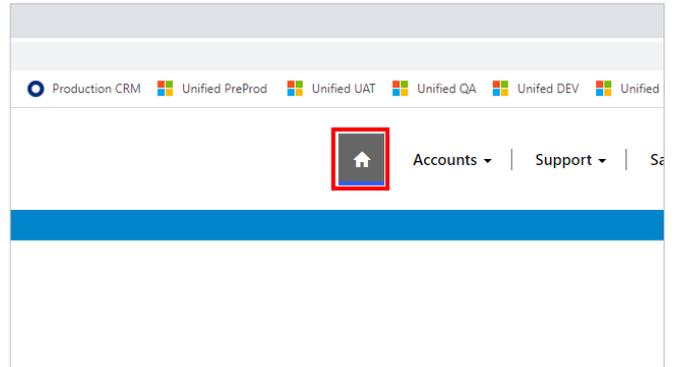
The screenshot shows a contact form with the following fields: Email (* jrein@gmail.com), Business Phone (* 555-2345), Mobile Phone (555-3434), and Address (Address line 1, Address line 2). The Address field is highlighted with a red border.

Click on the button **Submit** to create the contact.

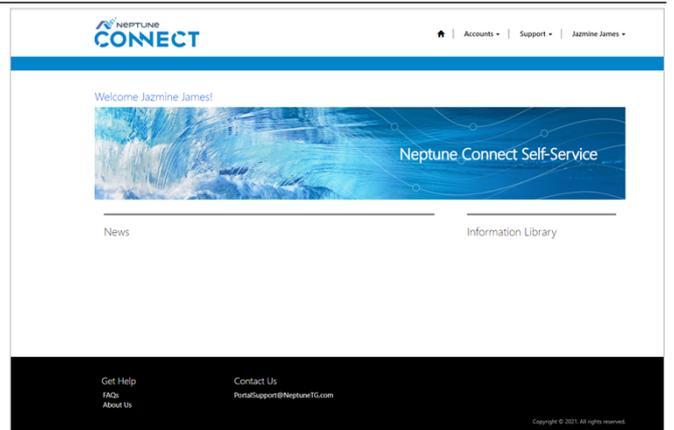


The screenshot shows a contact form with the following fields: Country (HAWAII 90719, United States), and a Submit button. The Submit button is highlighted with a red border. At the bottom, there are links for 'Get Help' and 'Contact Us'.

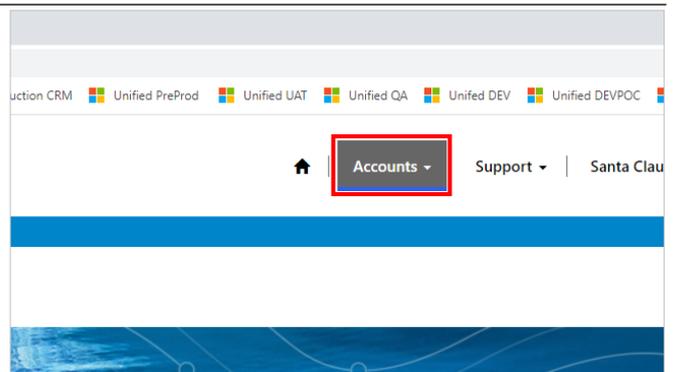
Click on the **Home icon** to navigate to the Home page.



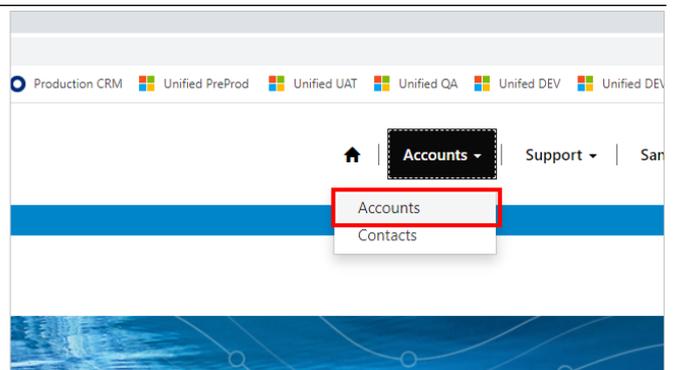
The Home page contains links to all other pages on the Portal.



Click on the **Accounts** drop down.



Click on the link **Accounts**.

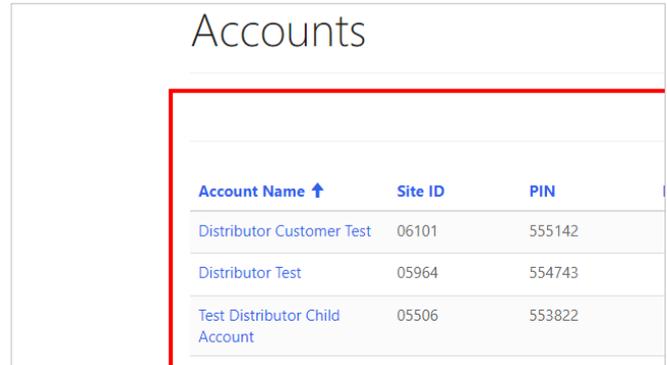


Depending on your assigned Web Role, users can see all accounts under their hierarchy including:

- **Parent Account** - Main Account for the Contact
- **Customer Accounts** - All Accounts where the Contact's Main Account is the Managing Distributor

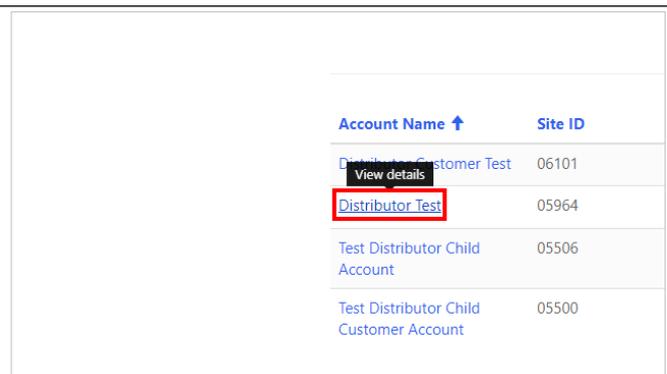
Child Accounts - All Accounts where the Contact's Main Account is the **Parent Account**

- **Child Customer Accounts** - All Accounts where the Contact's Child Account is the **Managing Distributor**



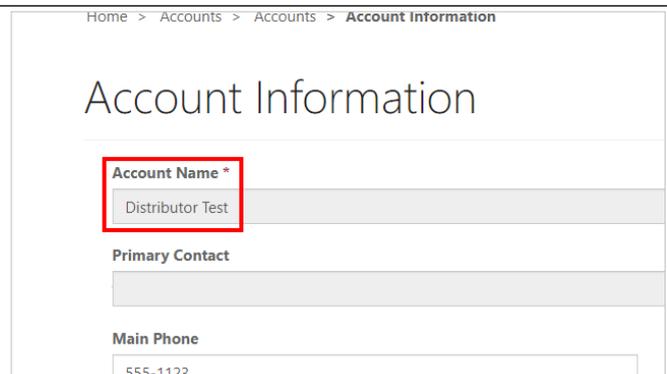
Account Name ↑	Site ID	PIN
Distributor Customer Test	06101	555142
Distributor Test	05964	554743
Test Distributor Child Account	05506	553822

Click on the **Account Name** link to open the Account record.



Account Name ↑	Site ID
Distributor Customer Test	06101
Distributor Test	05964
Test Distributor Child Account	05506
Test Distributor Child Customer Account	05500

Account Information can be viewed and updated.



Home > Accounts > Accounts > Account Information

Account Information

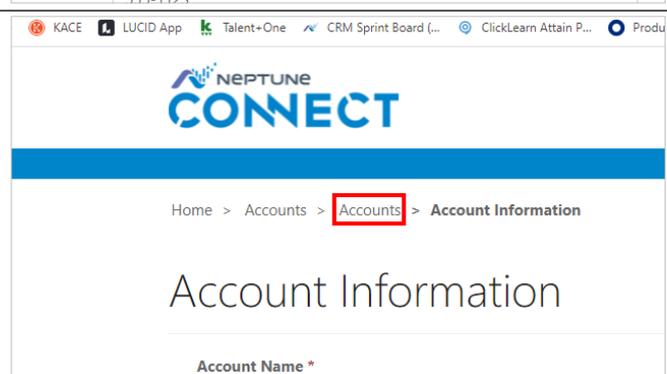
Account Name *
Distributor Test

Primary Contact

Main Phone
555-1123

Click on the breadcrumb **Accounts** to return to the previous Accounts page.

Breadcrumbs are links to connected web pages in the portal.



KACE LUCID App Talent+One CRM Sprint Board (...) ClickLearn Attain P... Produ

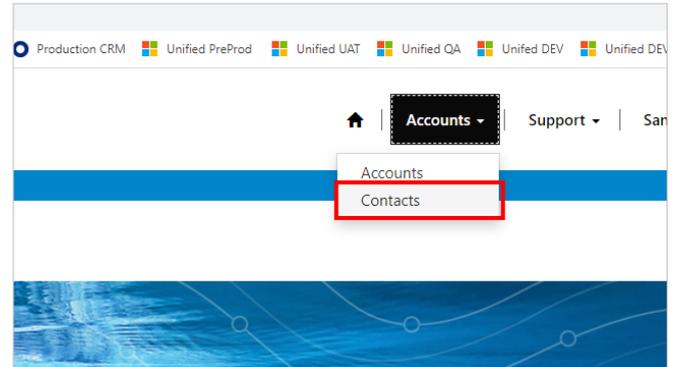
NEPTUNE CONNECT

Home > Accounts > **Accounts** > Account Information

Account Information

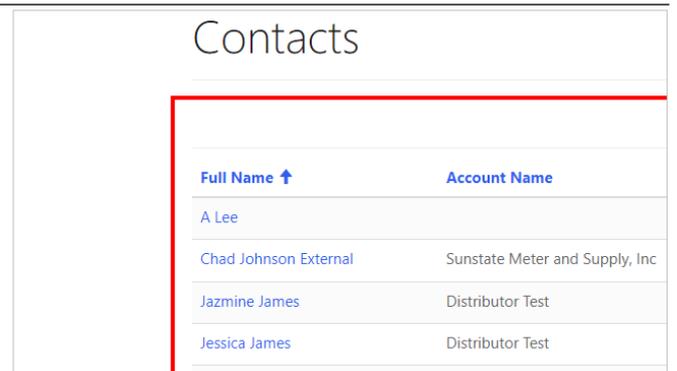
Account Name *

Click on the link **Contacts**



Depending your on the assigned Web Role, users can see all contacts related to accounts under their hierarchy including:

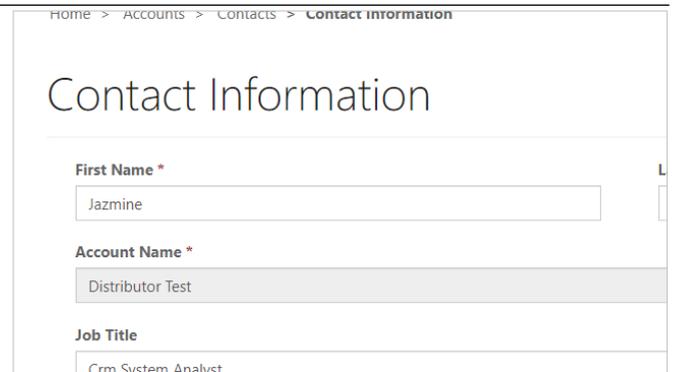
- Parent Account Contacts
- Customer Accounts Contacts
- Child Accounts Contacts
- Child Customer Accounts Contacts



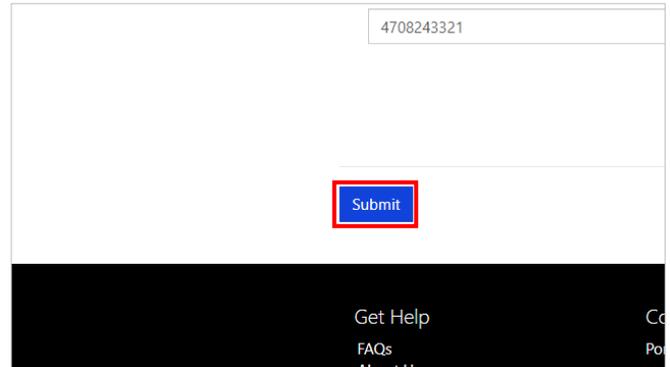
Click the **Account Name** to open the Contact information record.



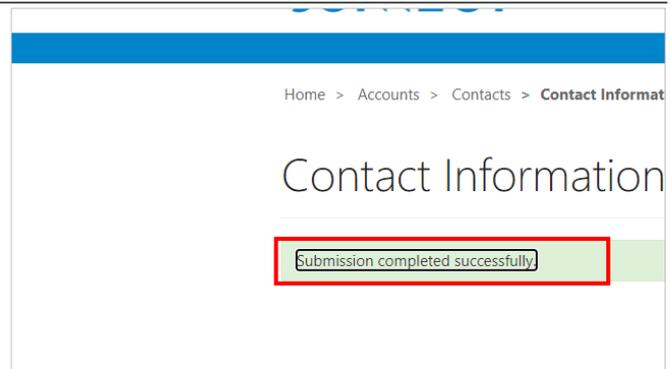
Contact information can be viewed and updated.



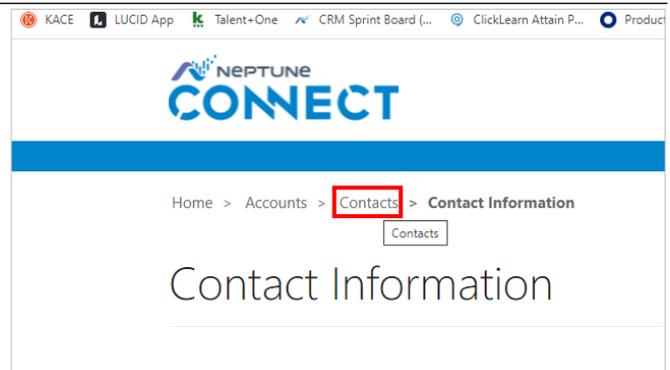
Click on the button **Submit** to update the Contact record.



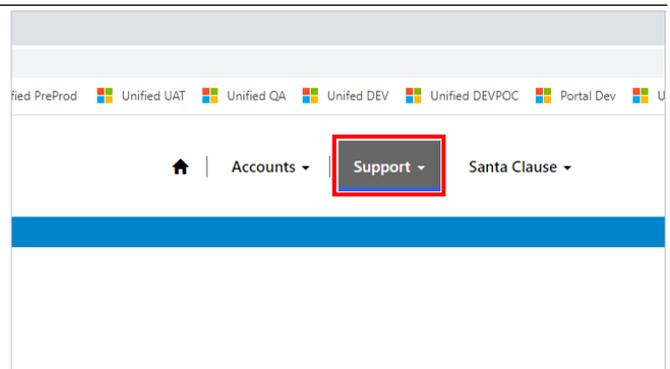
A notification will prompt when record has successfully updated.



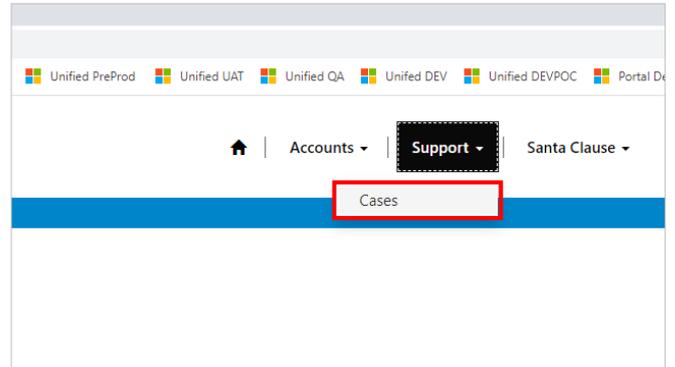
Click on the **Contacts** breadcrumb to return to the *Contacts* page.



Click on the link **Support**

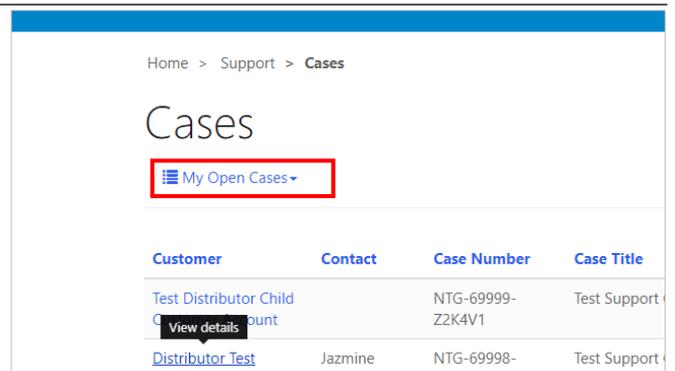


Click on the link **Cases**

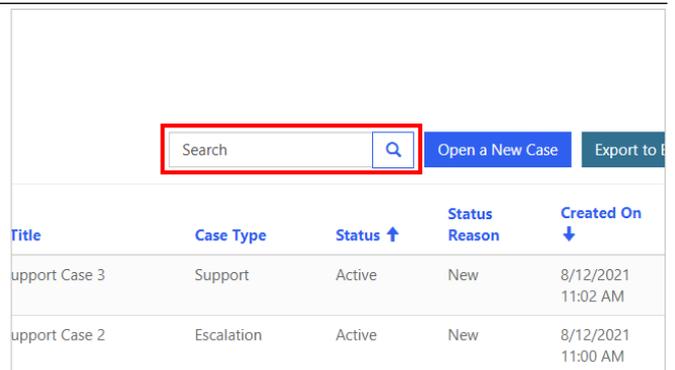


There are three Views available for Cases related to Accounts from your hierarchy:

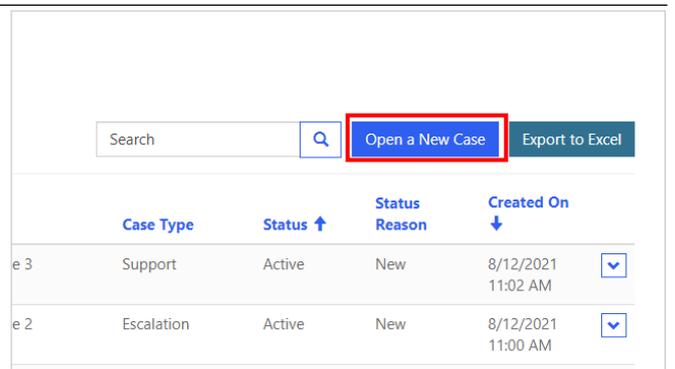
- **My Open Cases** - All Active Support and Escalation Cases under the Account Hierarchy
- **My Closed Cases** - All Resolved Support and Escalation Cases under the Account Hierarchy
- **All My Cases** - All Support and Escalation Cases regardless of Status under the Account Hierarchy



Use the **Search** box to look for a specific case.



Click on the **Open a New Case** button to submit a new support request.



Enter the **Case Title**

Home > Support > Cases > Open a New Case

Open a New Case

Title *

Account *

Case Type *

Select an *Account*.
Click on the **Magnifying Glass** icon to open the Account lookup field.

Title *

Account * 

Case Type *

Description *

Launch lookup modal

Click on a **Checkbox** to select the correct Account.

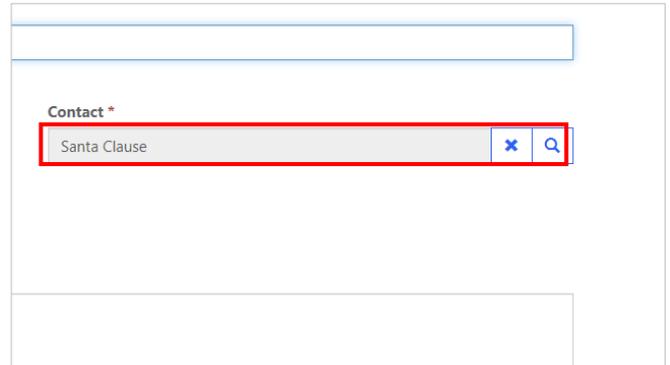
<input checked="" type="checkbox"/>	Account Name ↑	Site ID	PIN	Primary C
<input type="checkbox"/>	Distributor Customer Test	06101	555142	
<input checked="" type="checkbox"/>	Distributor Test	05964	554743	
<input type="checkbox"/>	Test Distributor Child Account	05506	553822	
<input type="checkbox"/>	Test Distributor Child Customer Account	05500	554744	

Click on the button **Select** to add the Account to the Case.

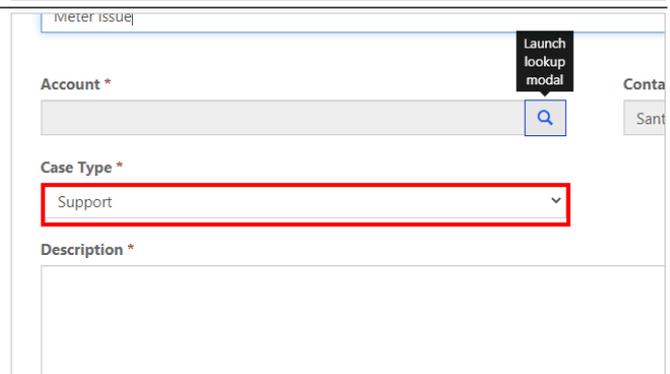
05964	554743	
05506	553822	
05500	554744	Test Distributor Child Account

The Contact field defaults to the signed in user's Contact record.

Magnifying Glass icon to open the Contact lookup field and select a new contact.



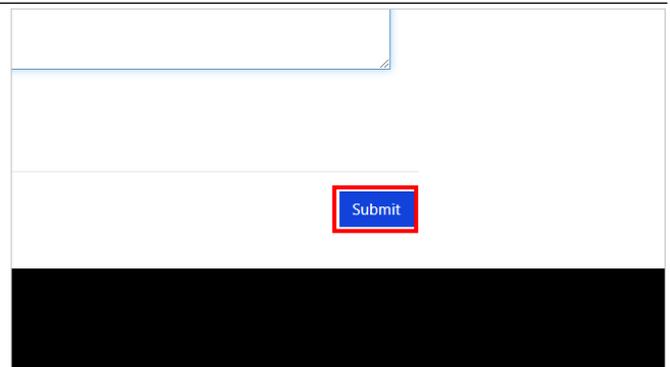
Case Type currently only shows the *Support* case type.



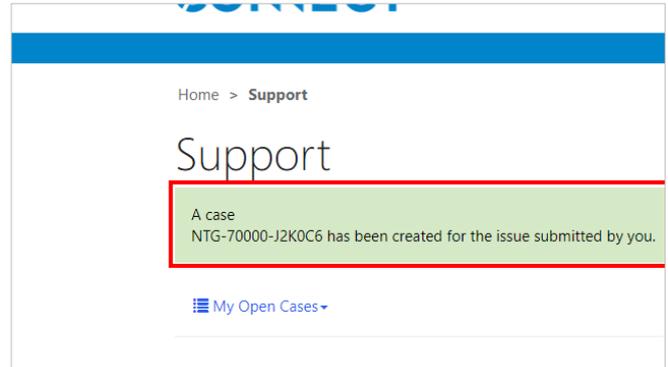
Enter the **Description** of the case being reported.



Click on the button **Submit** to create the Case.



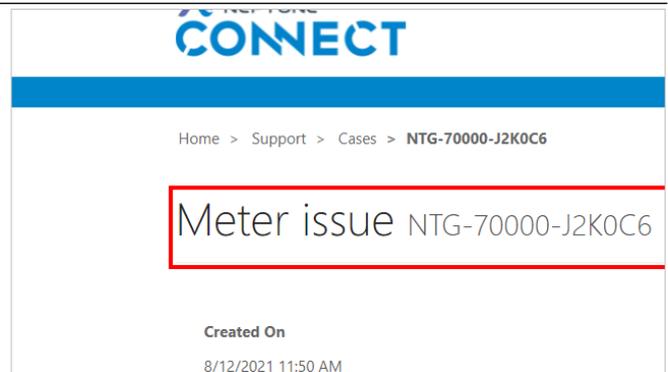
A notification will display with the newly created case's Case ID.
Users will also return to the Support Case View.



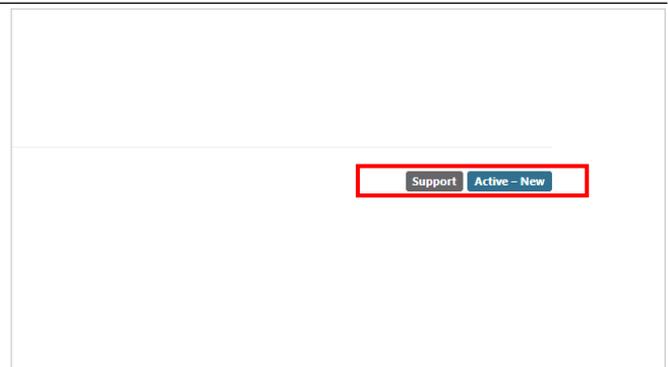
Click on the **Customer** hyperlink to view the Case details.



The Case Details will display with the **Case Title** and **Case ID** in the header.

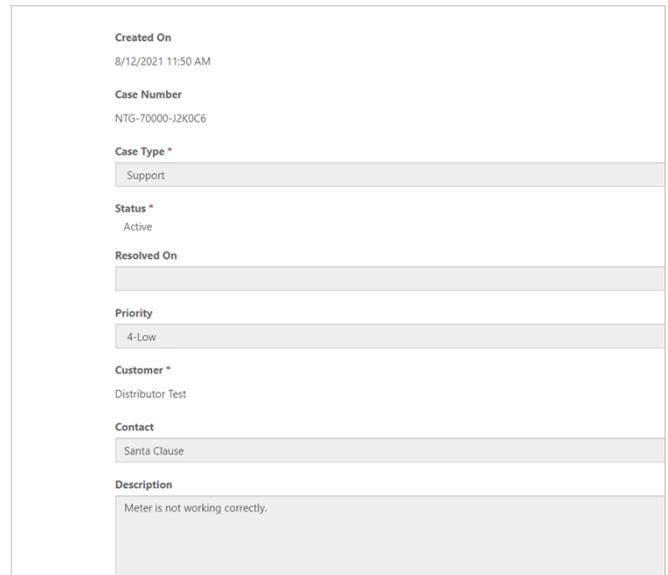


The header will also display the **Case Type** and **Case Status**.



Neptune Connect Self - Service Portal

Additional Case Details will display on the page.



Created On
8/12/2021 11:50 AM

Case Number
NTG-70000-J2K0C6

Case Type *
Support

Status *
Active

Resolved On

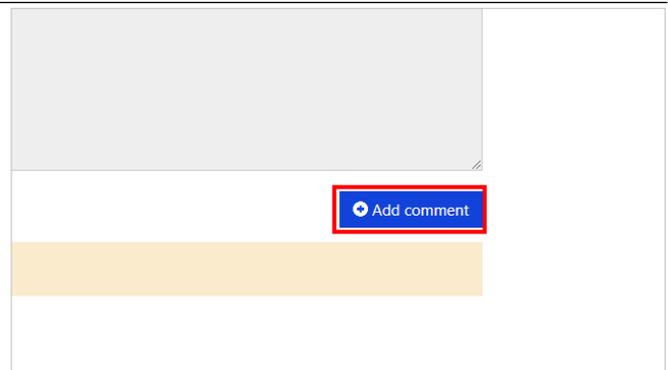
Priority
4-Low

Customer *
Distributor Test

Contact
Santa Clause

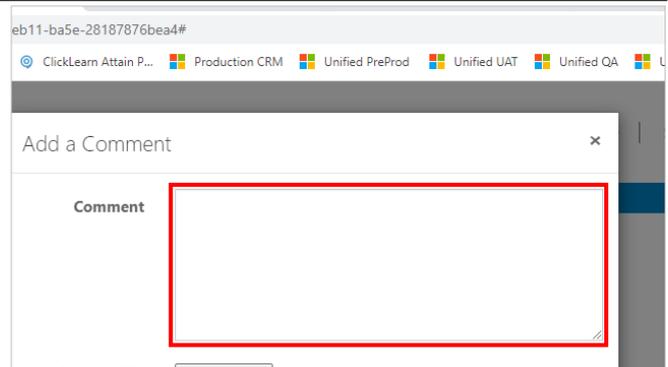
Description
Meter is not working correctly.

Click on the button **Add comment** to add a *Portal Comment*.
Portal Comments can be used to communicate to the assigned **Support Specialist** working your case.



Add comment

Add your comments to Support in the **Comment** text box.



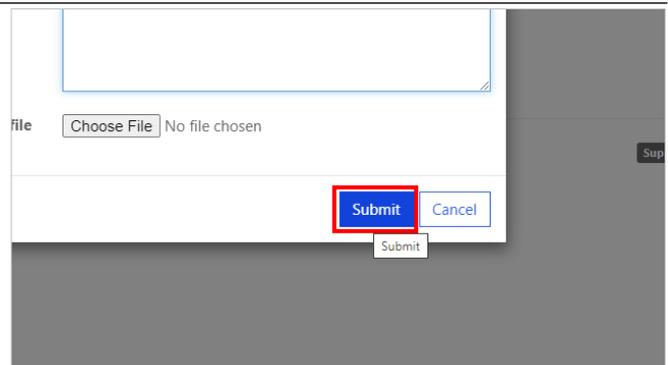
eb11-ba5e-28187876bea4#

ClickLearn Attain P... Production CRM Unified PreProd Unified UAT Unified QA U

Add a Comment

Comment

Click on the button **Submit** to send your Portal Comment to Support.

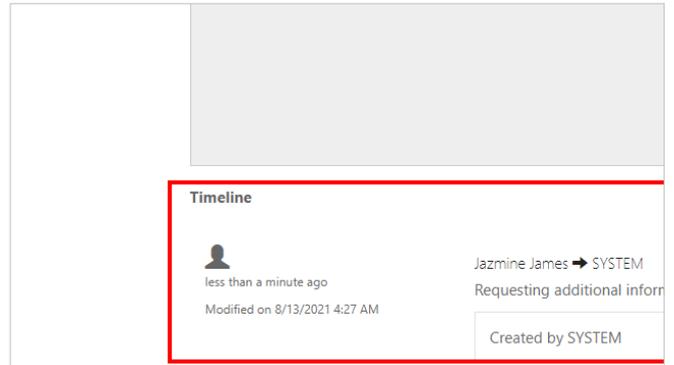


file Choose File No file chosen

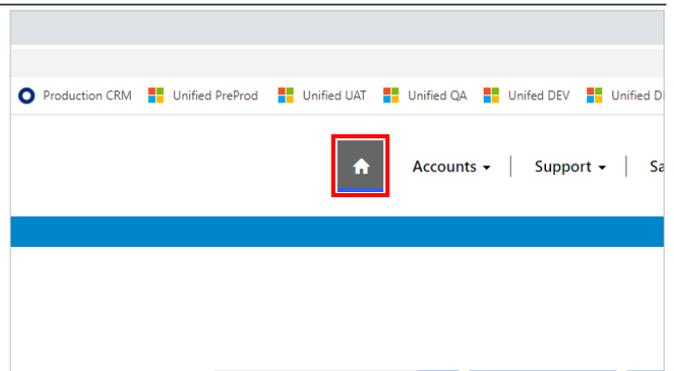
Submit Cancel

Submit

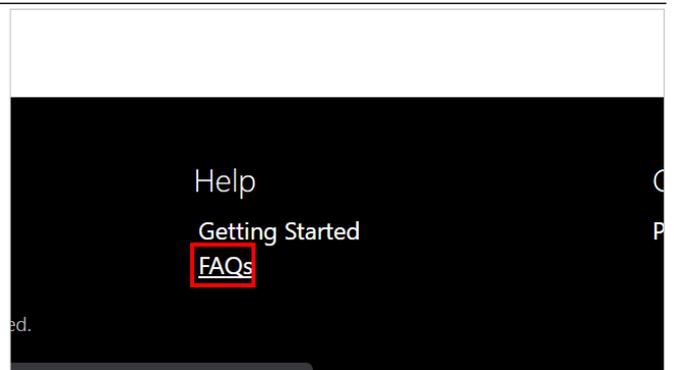
The **Portal Comment** will display on *Timeline* on the Case in the Portal as well.



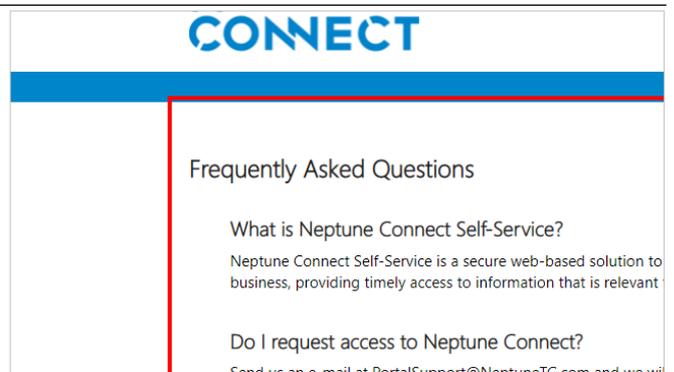
Click on the link **Home** to return to the home page.



Click on the link **FAQs** at the bottom of the home page.

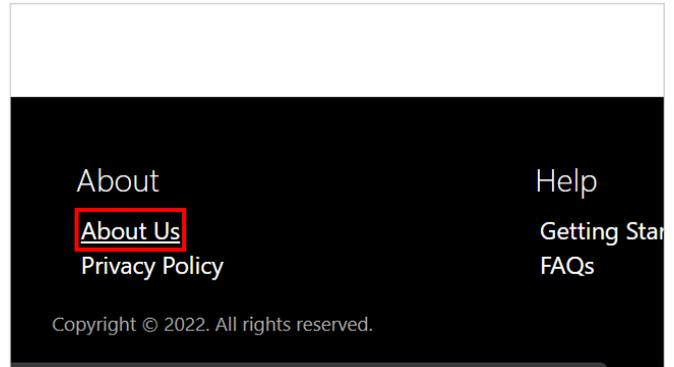


The **Frequently Asked Questions** page will show common questions related to the portal.

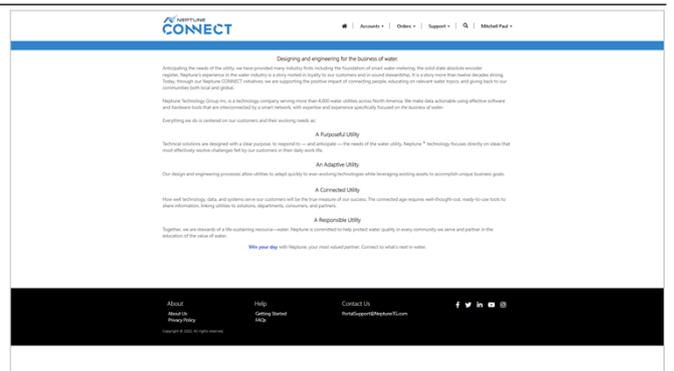


Neptune Connect Self - Service Portal

Click on the link About Us at the bottom of the page.

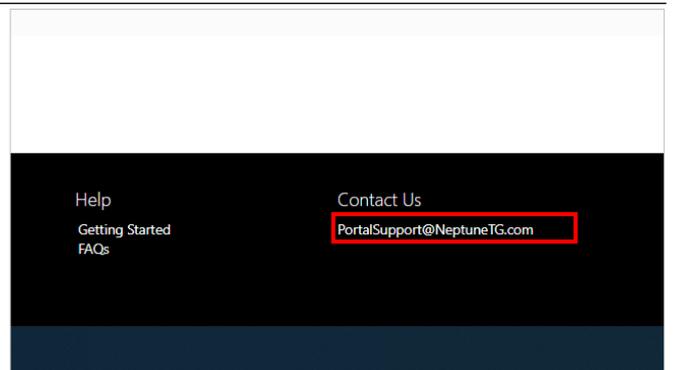


On the About Us page, you will find Neptune Technology Group company information.

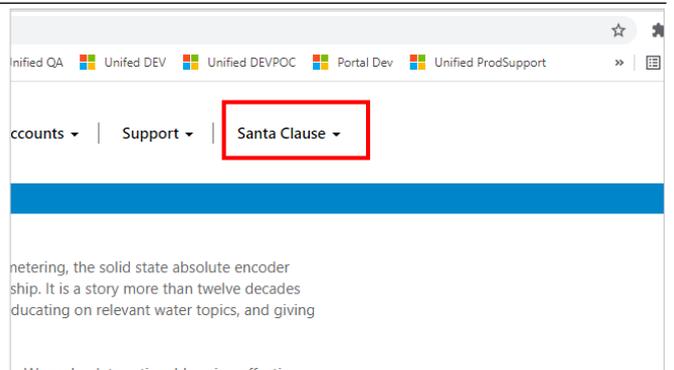


Need help with the Portal?

Use the Contact Us email <mailto:PortalSupport@NeptuneTG.com> **PortalSupport@NeptuneTG.com** to contact us on any problems you have with the portal.



Click on your **Account** drop down



We hope you enjoy using the Neptune Connect Self Service Portal!

Neptune Connect Self - Service Portal

Click on the link **Sign out** to log off of the portal

