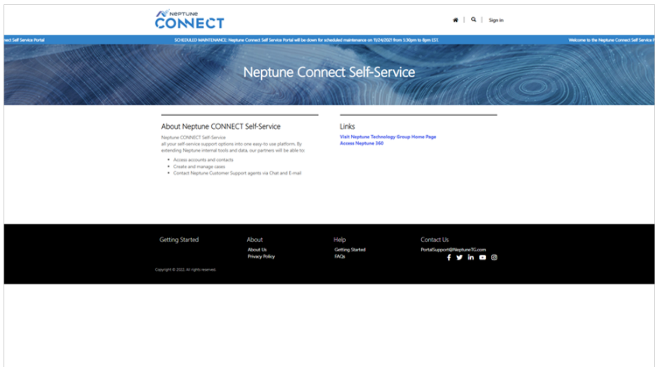
1. Getting Started Portal Guide

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

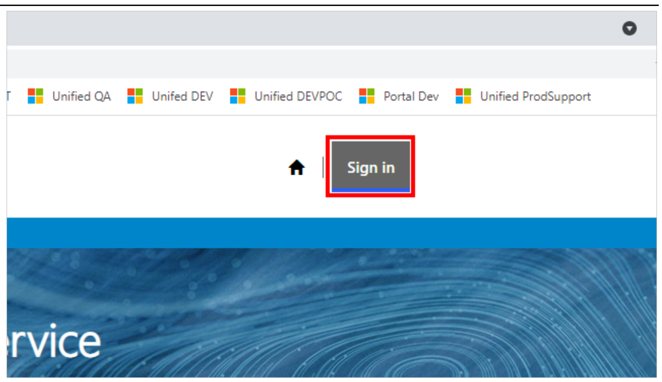
Through this training documentation you will find information to help you navigate inside the portal. The topics covered in the document include:

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

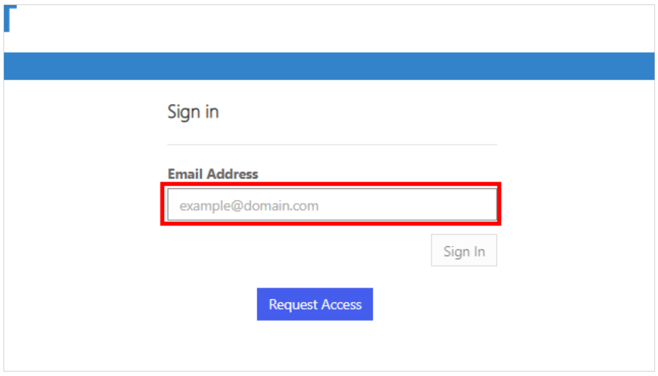
Use the provided Neptune Connect URL in your browser to navigate to the Neptune Connect Landing page.



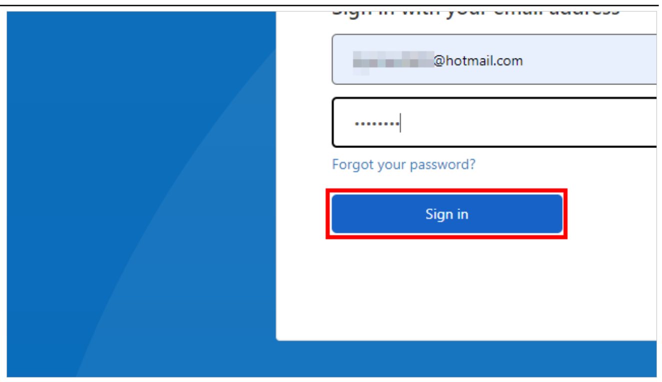
Click on the link **Sign in** to authenticate.



Enter the **Email Address**.

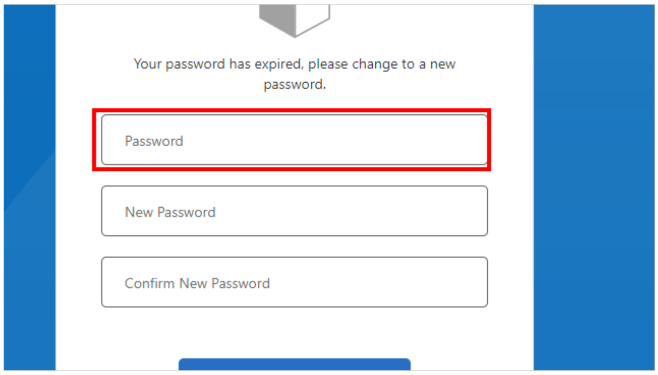


Use your designated Email and Temporary password to *Sign in*.

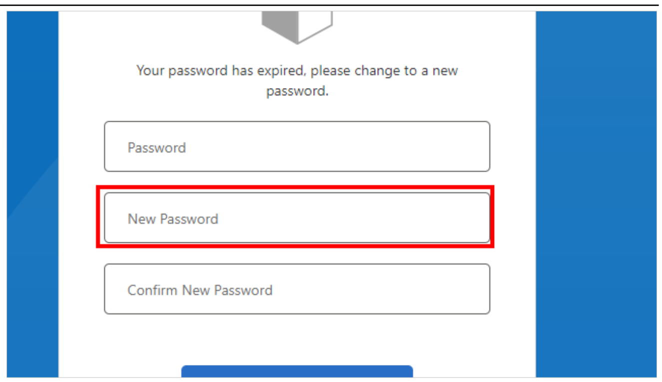


Users will be prompted that the password has Expired and a new password must be created.

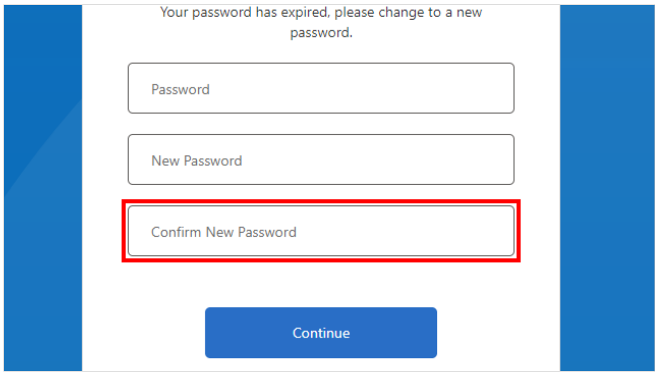
Enter the temporary password in the *Password* field.



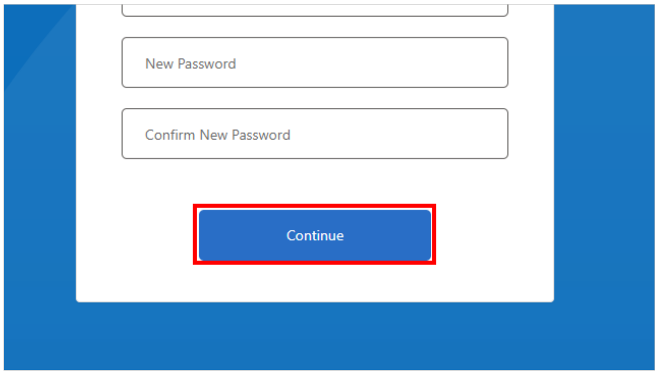
Click on the New *Password* field to create a new password.



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

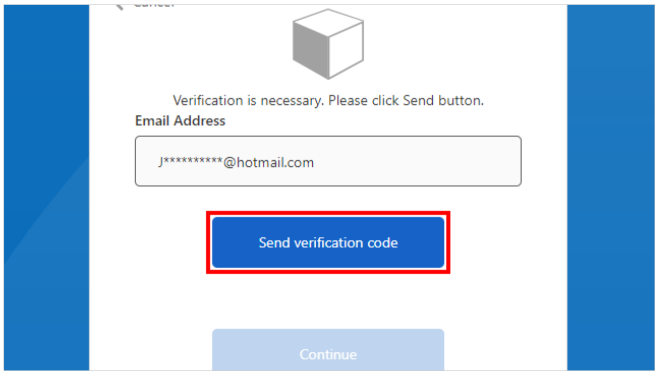


Click **Continue.**



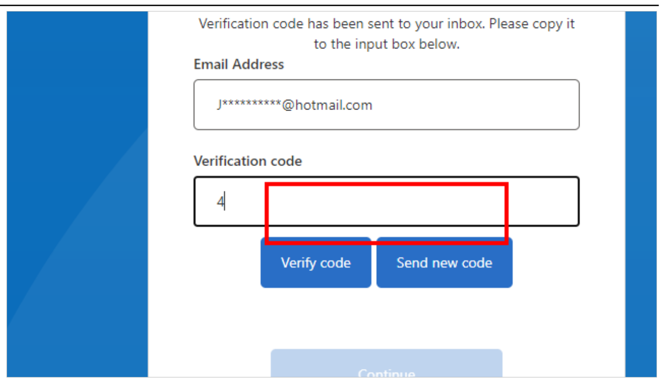
In order to complete the new password creation users will be prompted to verify their account with their Email Address.

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

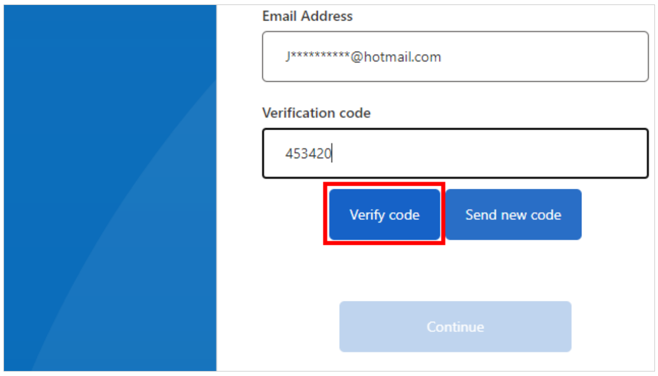


You will receive an email to verify your email address.

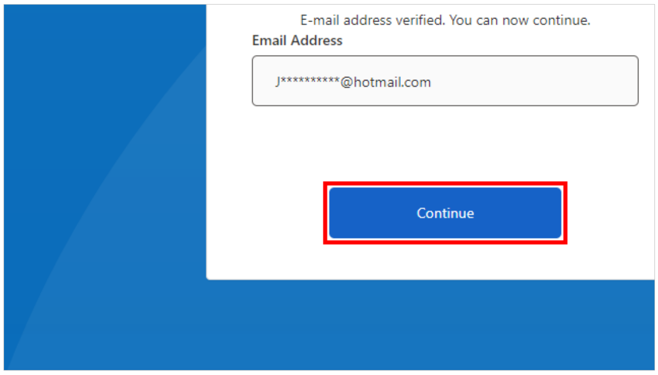
Once received, enter the **Verification code**.



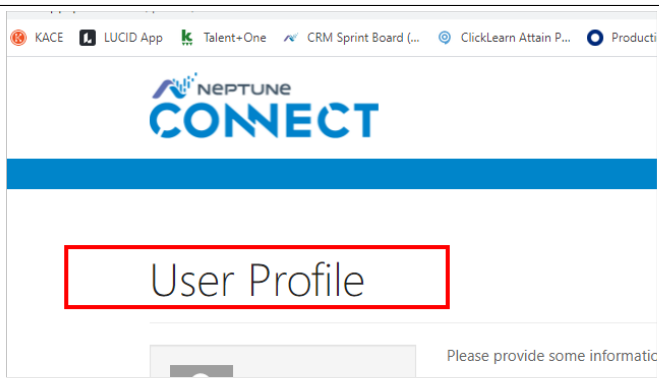
Click on the button **Verify code.**



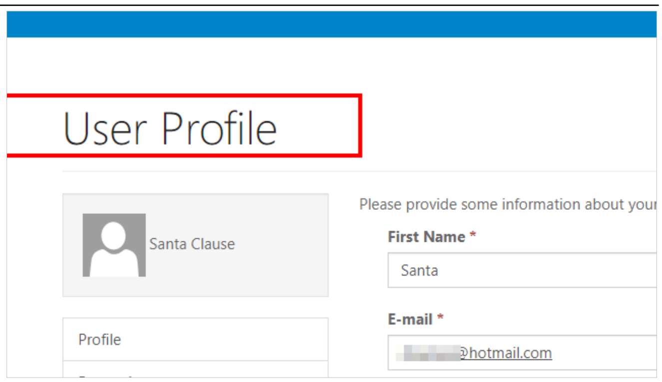
Click on the button **Continue.**



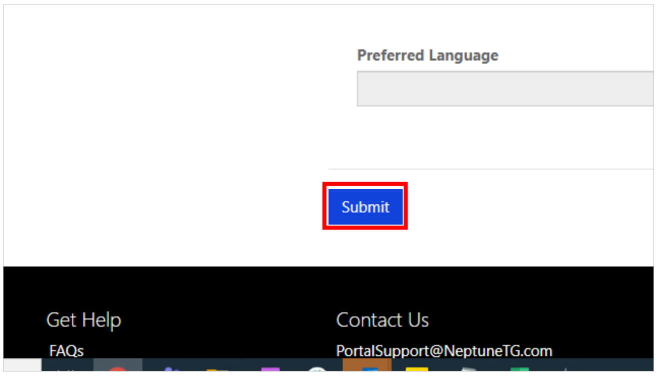
You will be automatically signed into the Customer Portal and land on the **User Profile** web page.



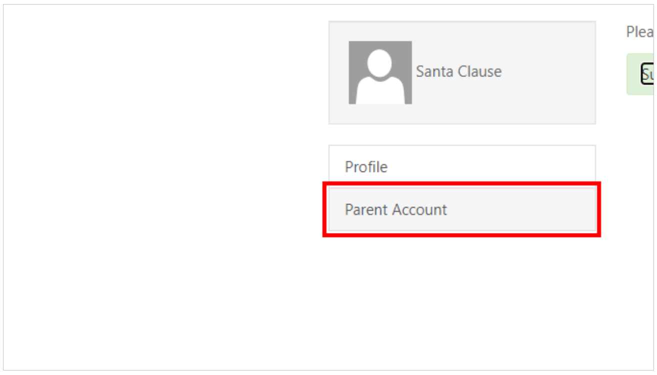
On the User Profile page, your contact information can be viewed and updated.



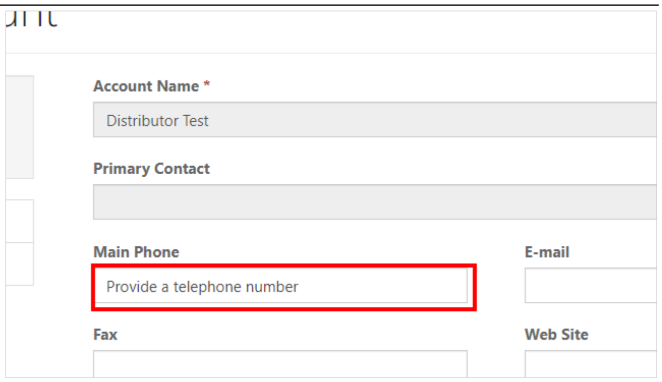
Click on the button **Submit** to save any updated information.



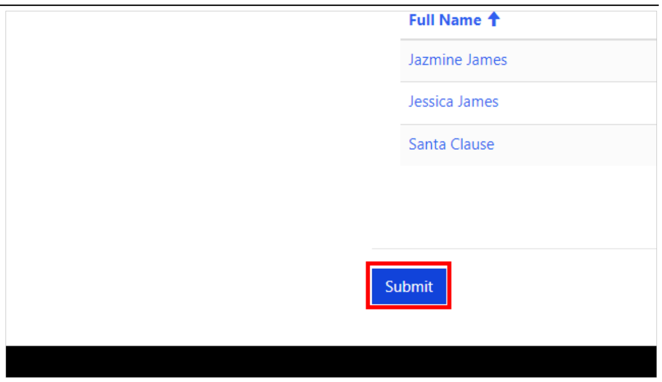
Click on the link **Parent Account** to see your Parent Account information.



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

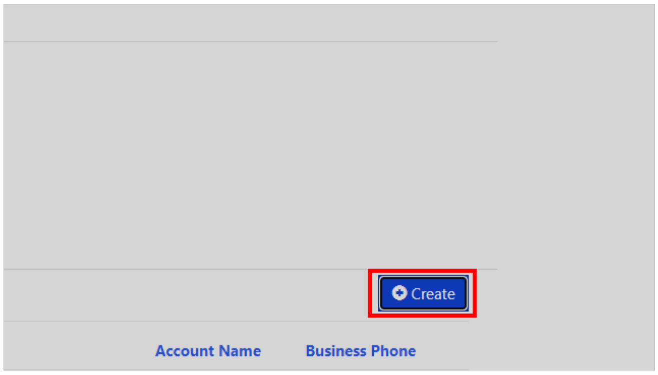


Click on the button **Submit** to update any changes made.



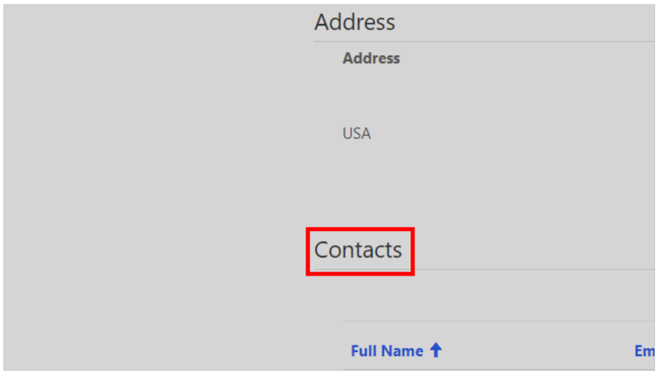
Account Contacts are also listed on the Parent Account web page.

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



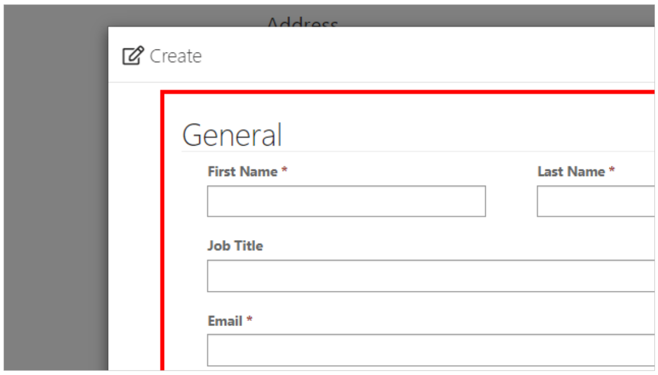
Duplicate contacts are not allowed in system. A contact is considered a duplicate under the following circumstances:

* 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

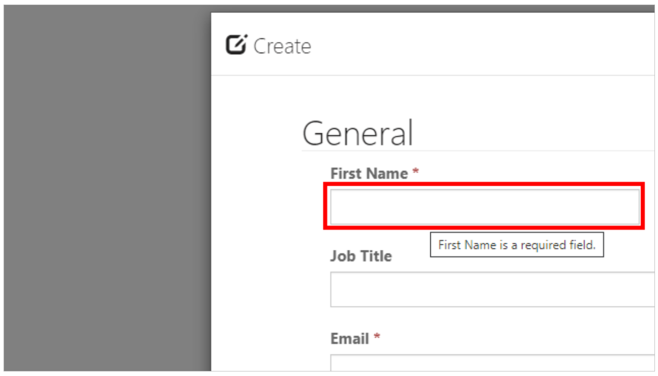


Enter the *contact information* for the new contact.

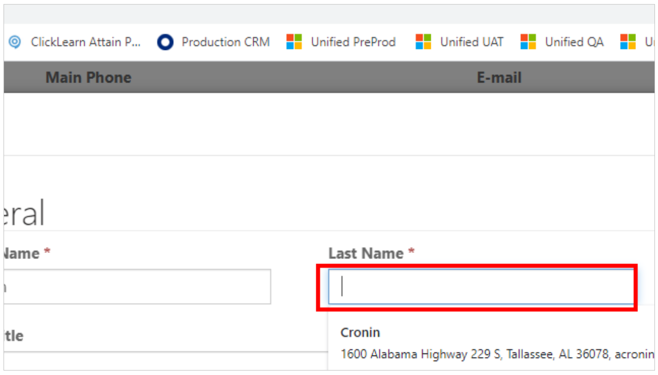
Be sure to fill out all the required fields with the red asterisk (*).



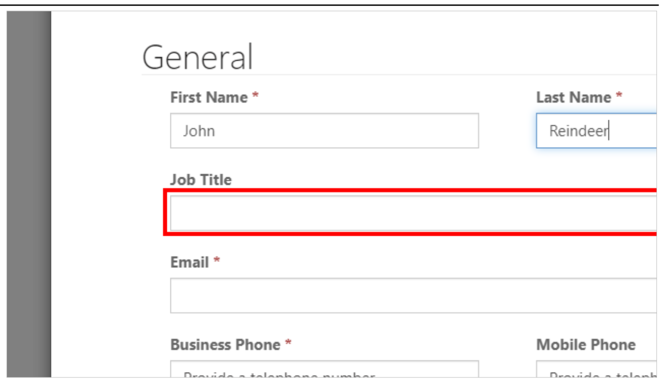
Enter the **First Name.**



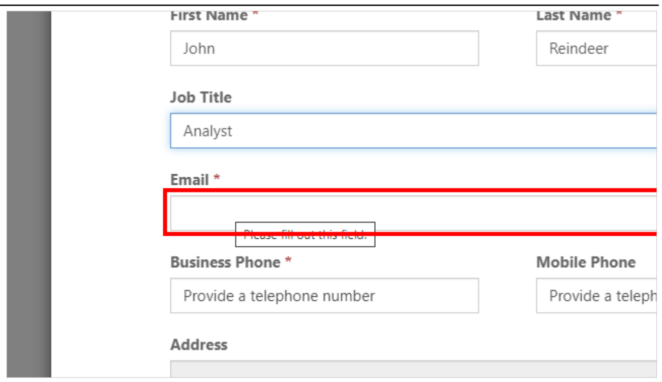
Enter the **Last Name.**



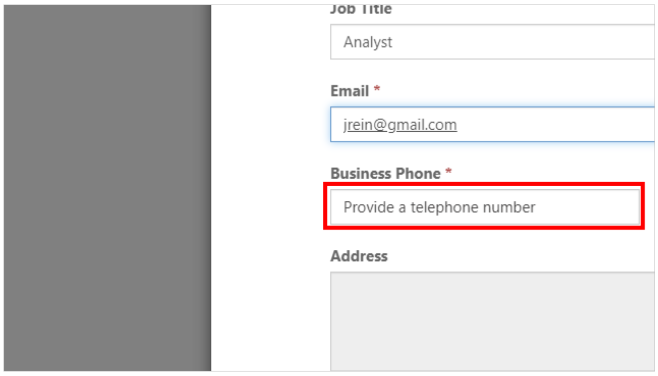
Enter the **Job Title** (optional).



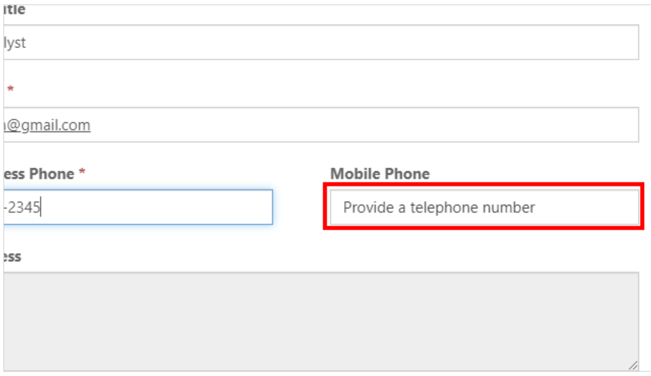
Enter the **Email Address.**



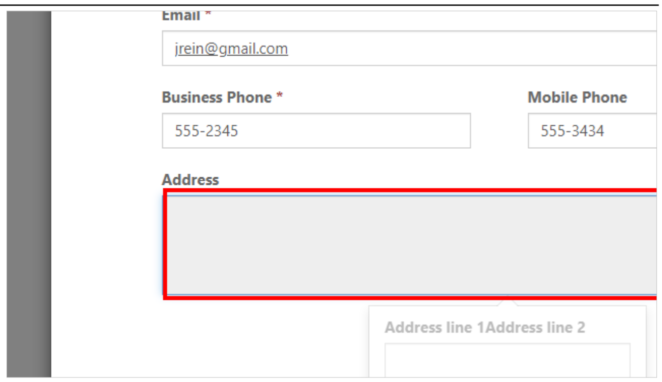
Enter the **Business Phone number.**



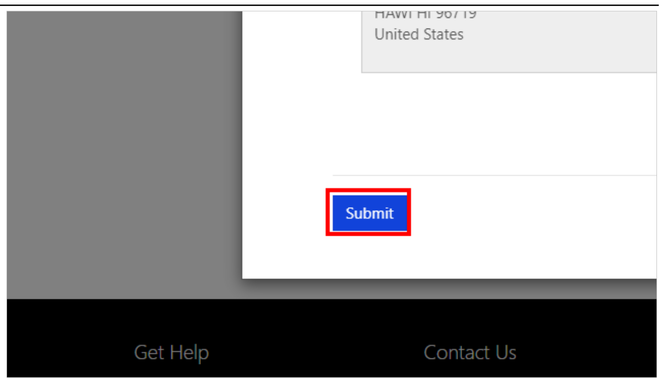
Enter the **Mobile Phone Number** (optional).



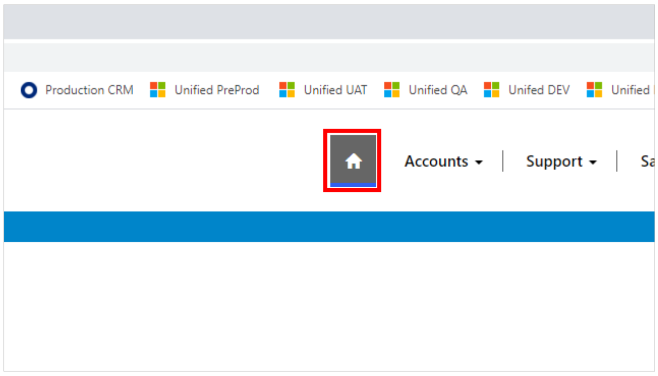
Enter contact's **Address** information (optional).



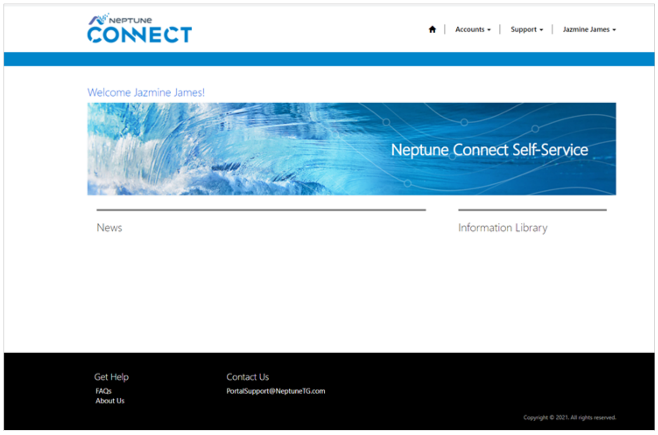
Click on the button **Submit** to create the contact.



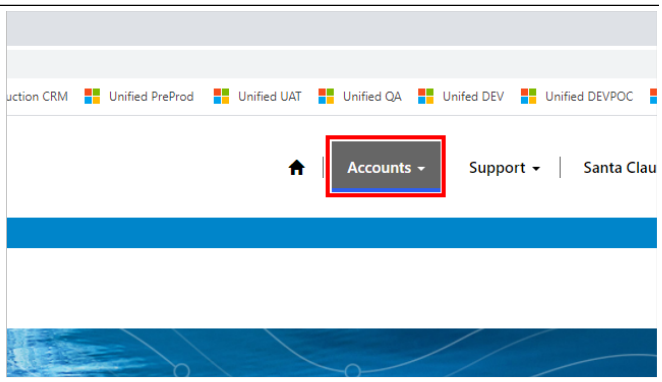
Click on the **Home icon** to navigate to the Home page.



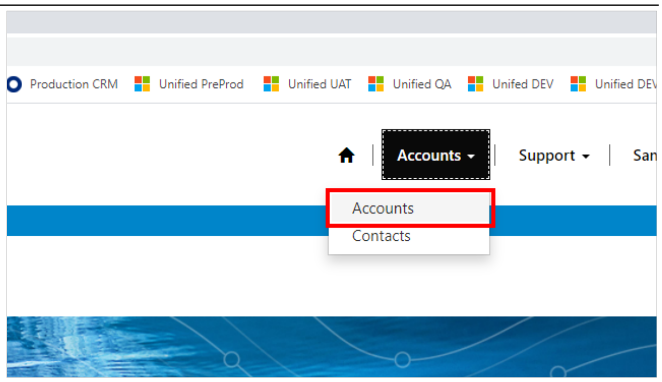
The Home page contains links to all other pages on the Portal.



Click on the **Accounts** drop down.



Click on the link **Accounts.**

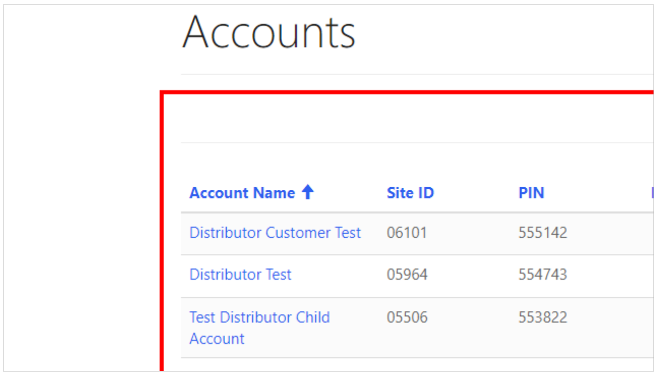


Depending on your assigned Web Role, users can see all accounts under their hierarchy including:

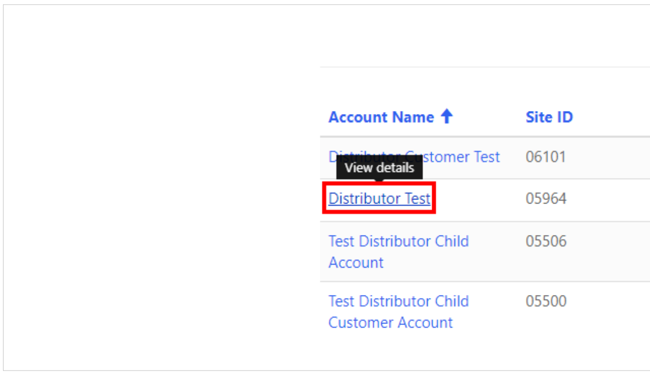
- **Parent Account** - Main Account for the Contact
- **Customer Accounts** - All Accounts where the Contact's Main Account is the Managing Distributor

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

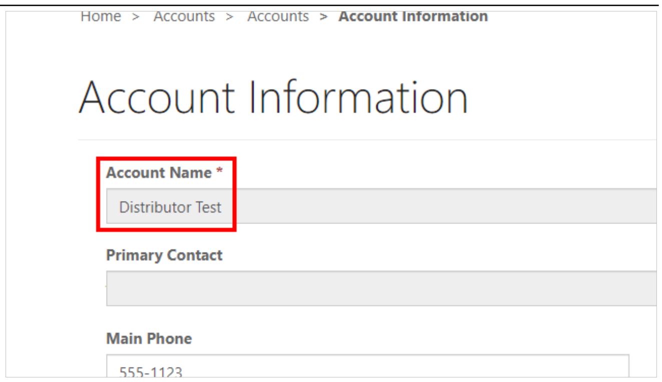
- **Child Customer Accounts** - All Accounts where the Contact's Child Account is the**Managing Distributor**



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

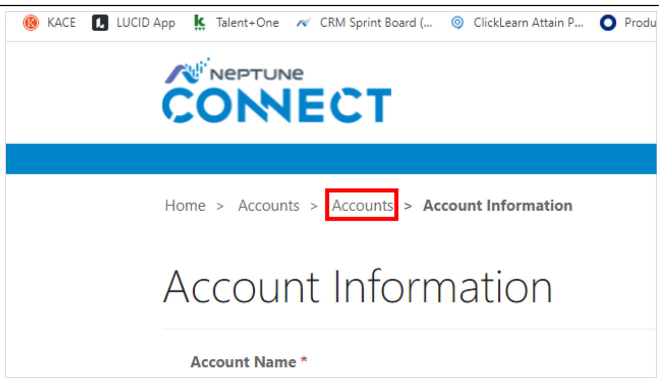


Account Information can be viewed and updated.

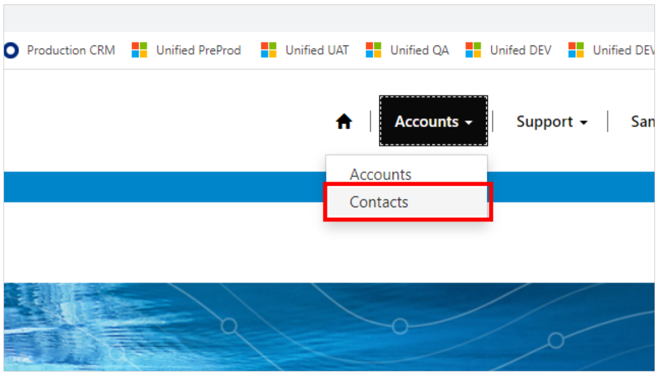


Click on the breadcrumb **Accounts** to return to the previous Accounts page.

Breadcrumbs are links to connected web pages in the portal.

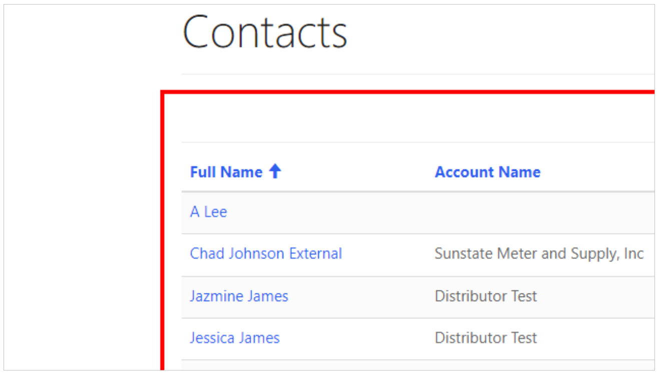


Click on the link **Contacts**

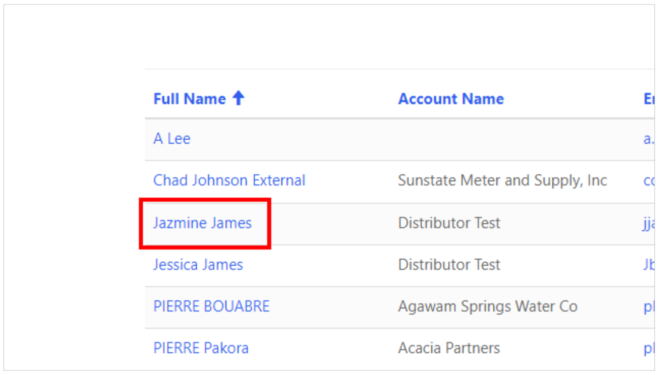


Depending your on the assigned Web Role, users can see all contacts related to accounts under their hierarchy including:

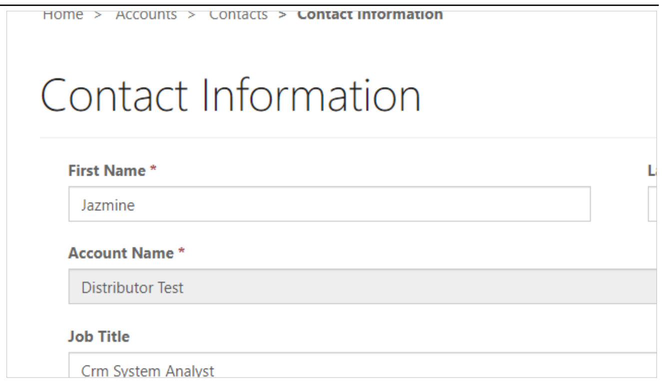
- Parent Account Contacts
- Customer Accounts Contacts
- Child Accounts Contacts
- Child Customer Accounts Contacts



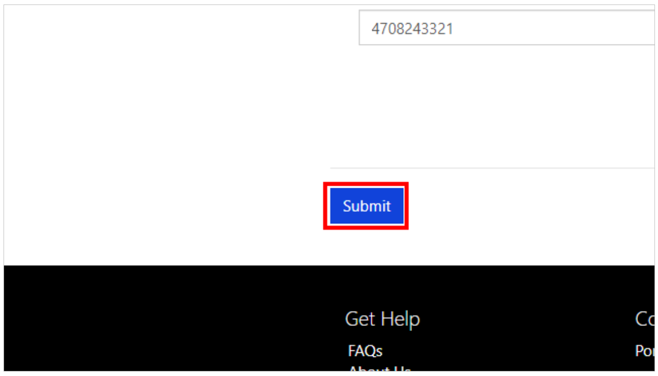
Click the **Account Name** to open the Contact information record.



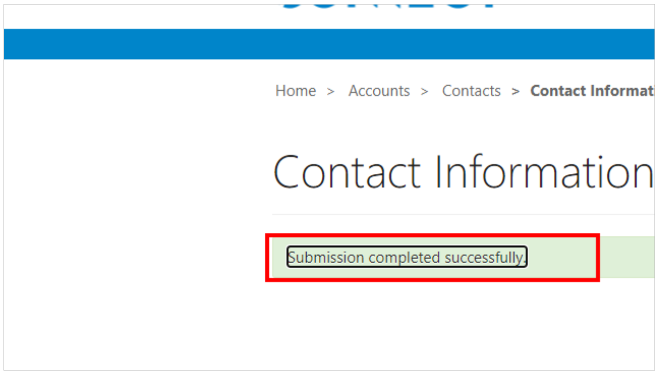
Contact information can be viewed and updated.



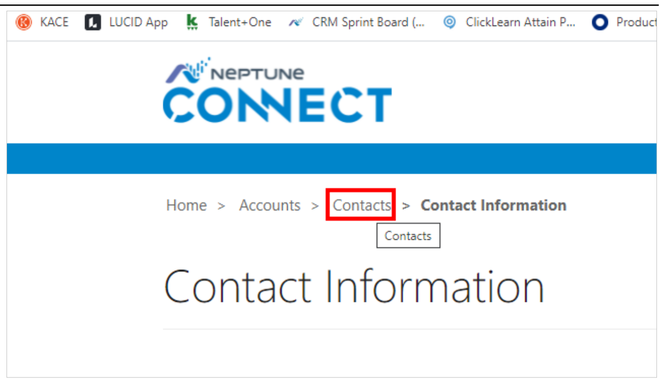
Click on the button **Submit** to update the Contact record.



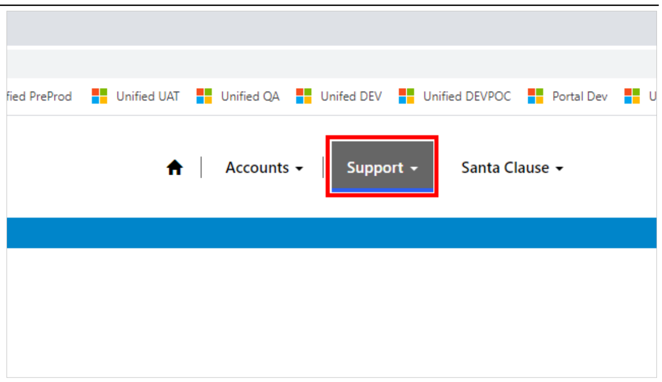
A notification will prompt when record has successfully updated.



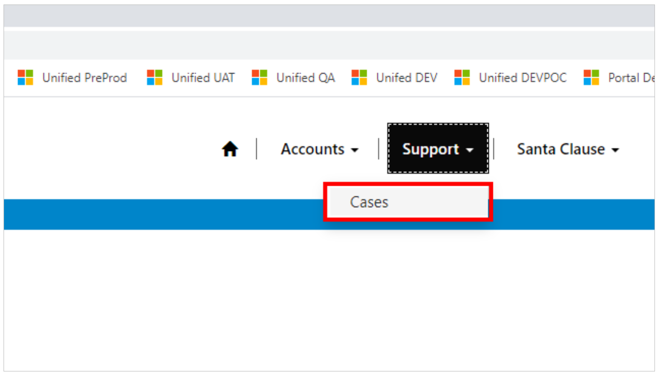
Click on the **Contacts** breadcrumb to return to the *Contacts* page.



Click on the link **Support**



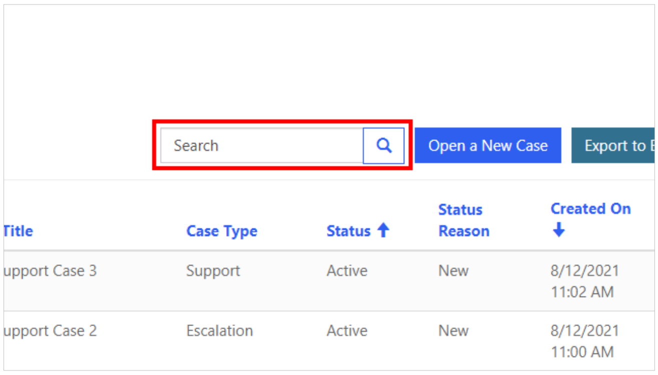
Click on the link **Cases**



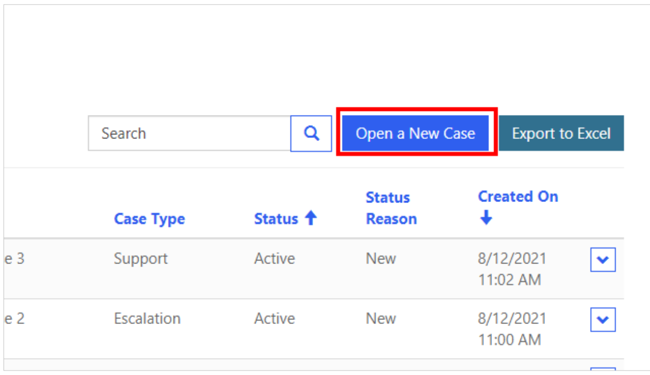
There are three Views available for Cases related to Accounts from your hierarchy:

- **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

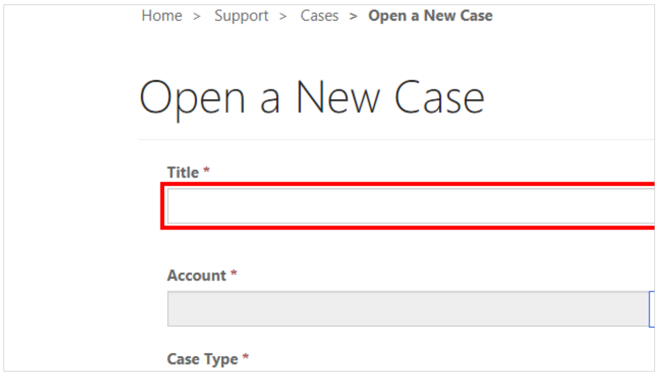
Use the **Search** box to look for a specific case.



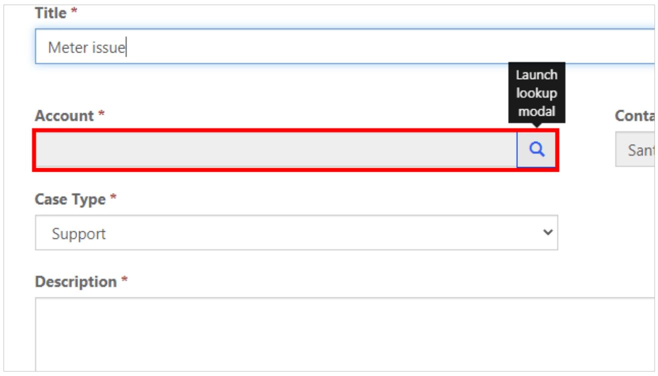
Click on the **Open a New Case** button to submit a new support request.



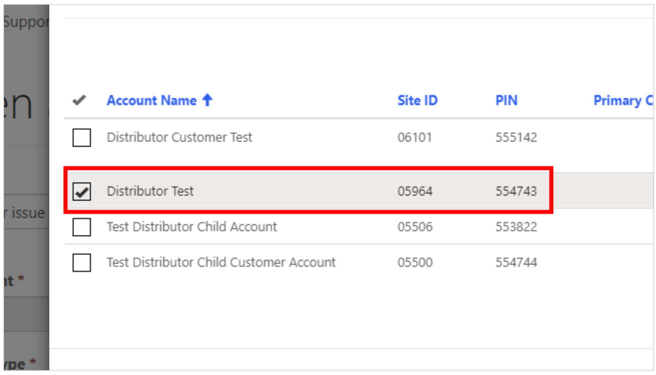
Enter the **Case Title**



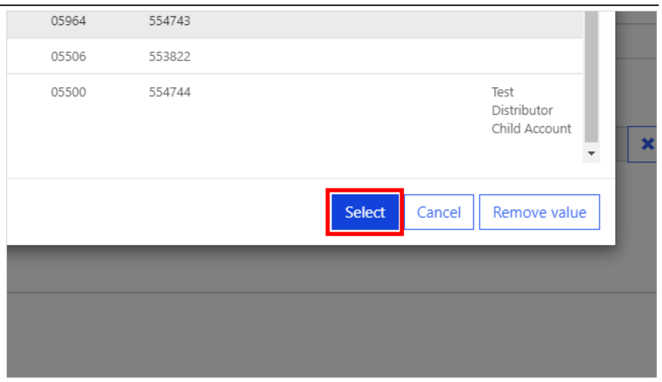
Select an *Account*.
Click on the **Magnifying Glass** icon to open the Account lookup field.



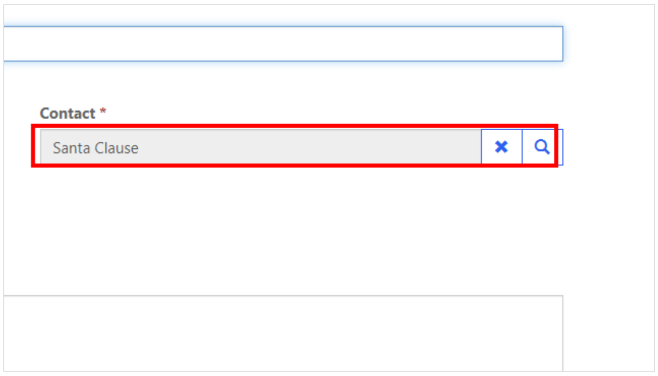
Click on a **Checkbox** to select the correct Account.



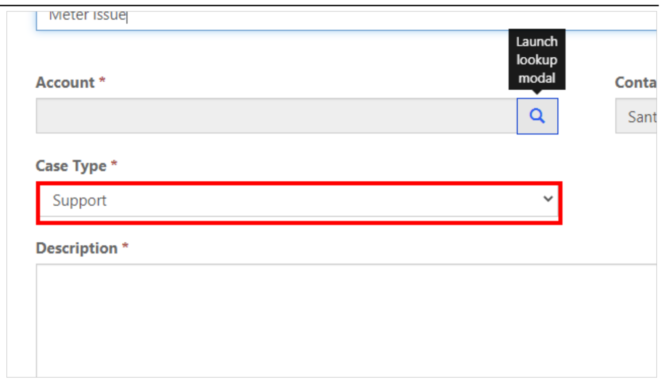
Click on the button **Select** to add the Account to the Case.



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.

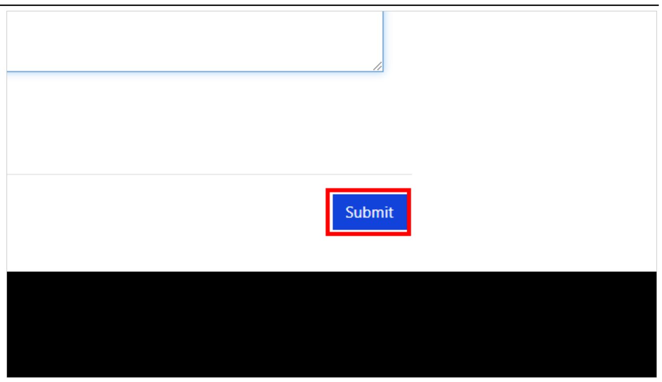


Case Type currently only shows the *Support* case type.

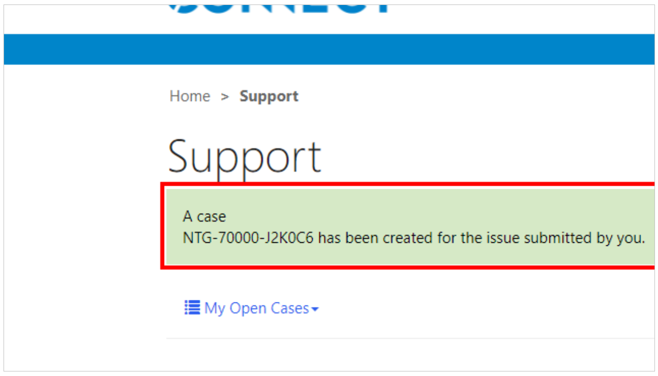


Enter the **Description** of the case being reported.

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

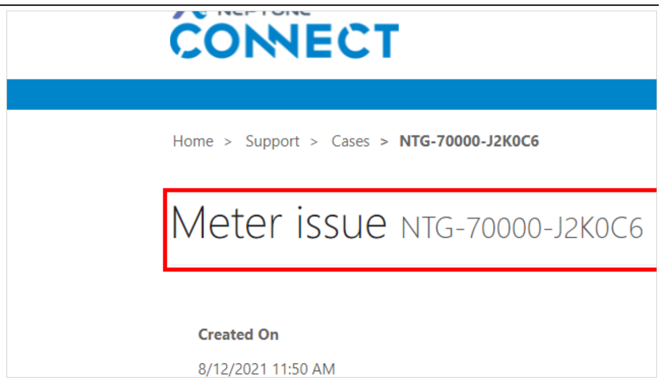


A notification will display with the newly created case's Case ID.
Users will also return to the Support Case View.

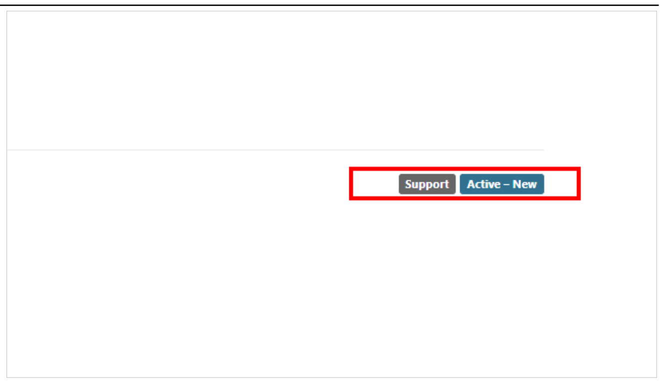


Click on the **Customer** hyperlink to view the Case details.

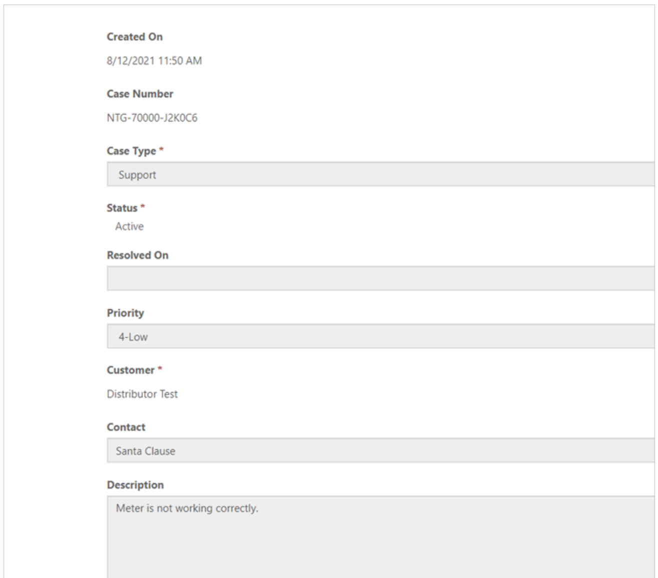
The Case Details will display with the **Case Title** and **Case ID** in the header.



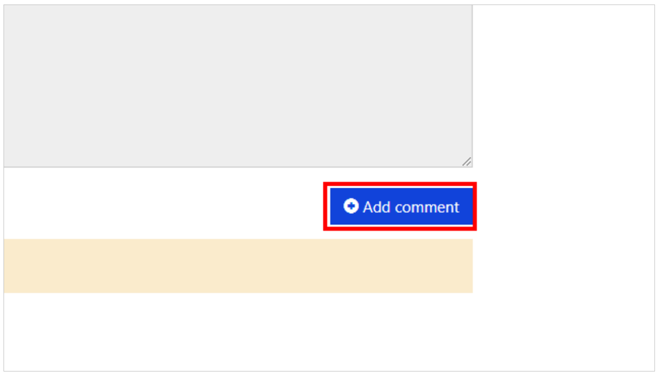
The header will also display the **Case Type** and **Case Status**.



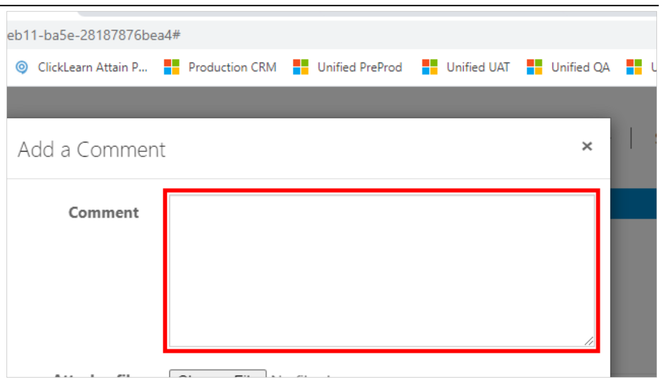
Additional Case Details will display on the page.



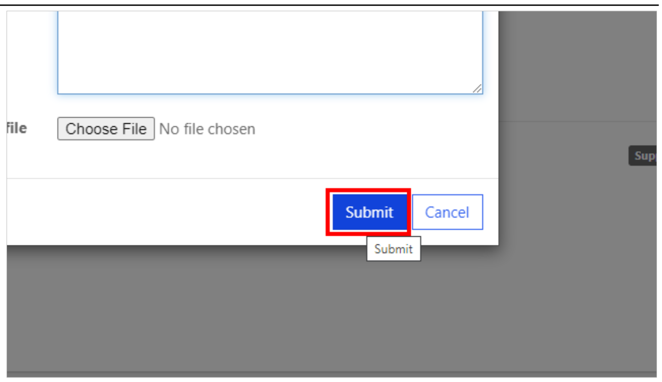
Click on the button **Add comment** to add a *Portal Comment.*
Portal Comments can be used to communicate to the assigned Support Specialist working your case.



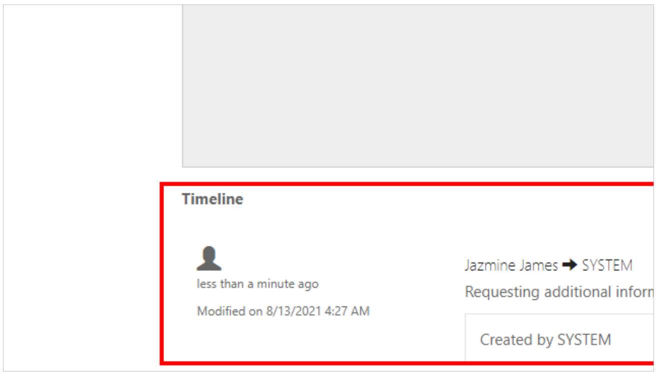
Add your comments to Support in the **Comment** text box.



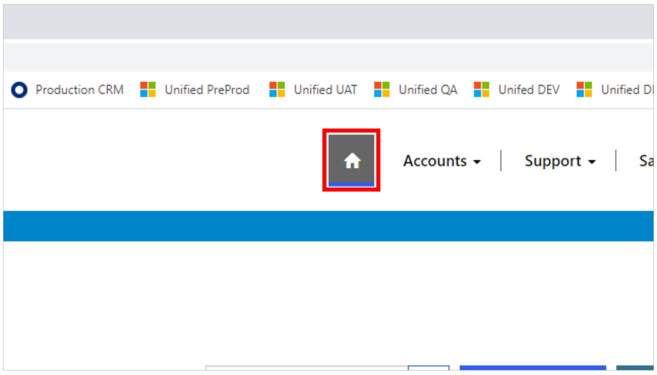
Click on the button **Submit** to send your Portal Comment to Support.



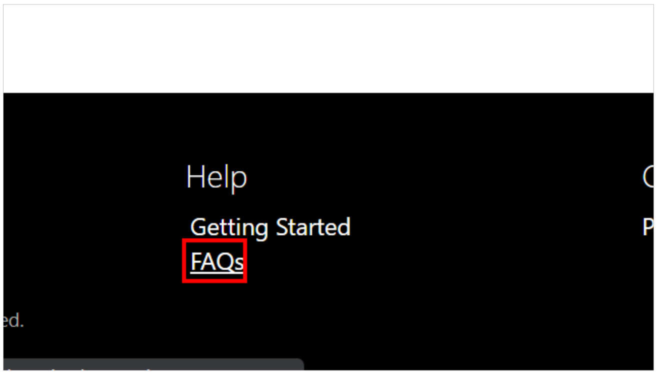
The **Portal Comment** will display on *Timeline* on the Case in the Portal as well.



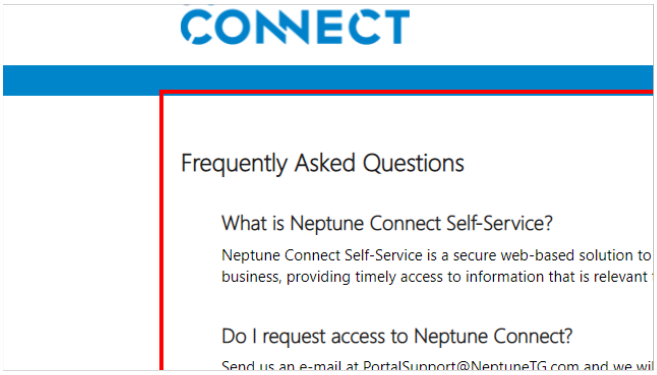
Click on the link **Home** to return to the home page.



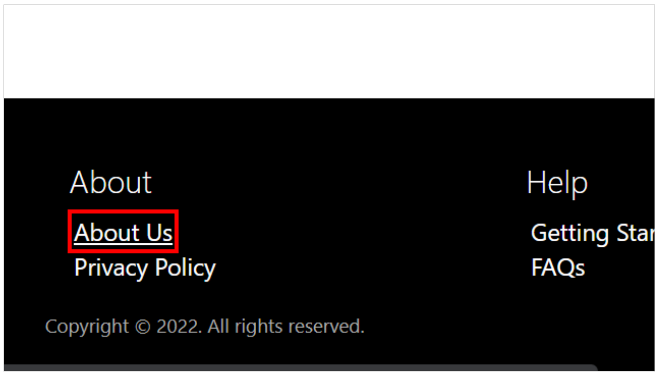
Click on the link FAQs at the bottom of the home page.



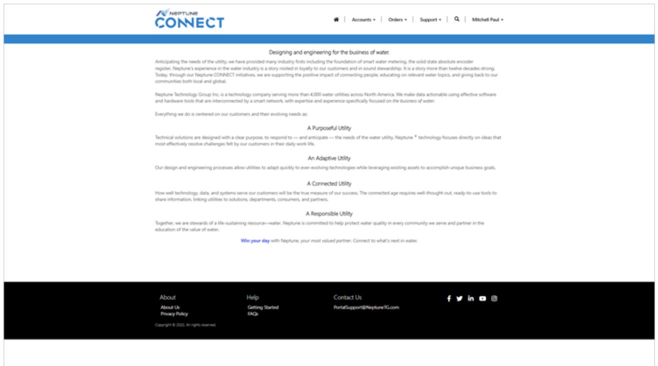
The **Frequently Asked Questions** page will show common questions related to the portal.



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

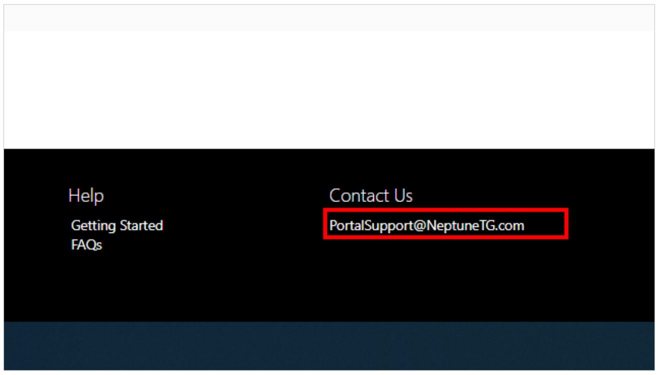


On the About Us page, you will find Neptune Technology Group company information.

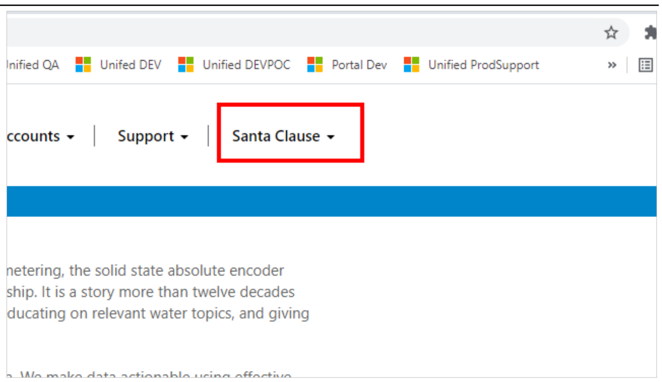


Need help with the Portal?

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!

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