CAT² Customer Portal

Quick Start Guide

CAT² : **Software for the Food Industry**

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Welcome to CAT²'s Customer Portal Quick Start Guide

In the Customer Portal, you can create and manage cases (formerly known as tickets in CAT²'s old help desk) for field trouble reports, RMAs, enhancement requests, questions, etc. The development of CAT²'s Customer Portal is still in progress; we ask for your patience as we continue to develop documentation and will update you as it is available.

Please review the content in this guide and send questions or comments to support@catsquared.com.

Thank you.

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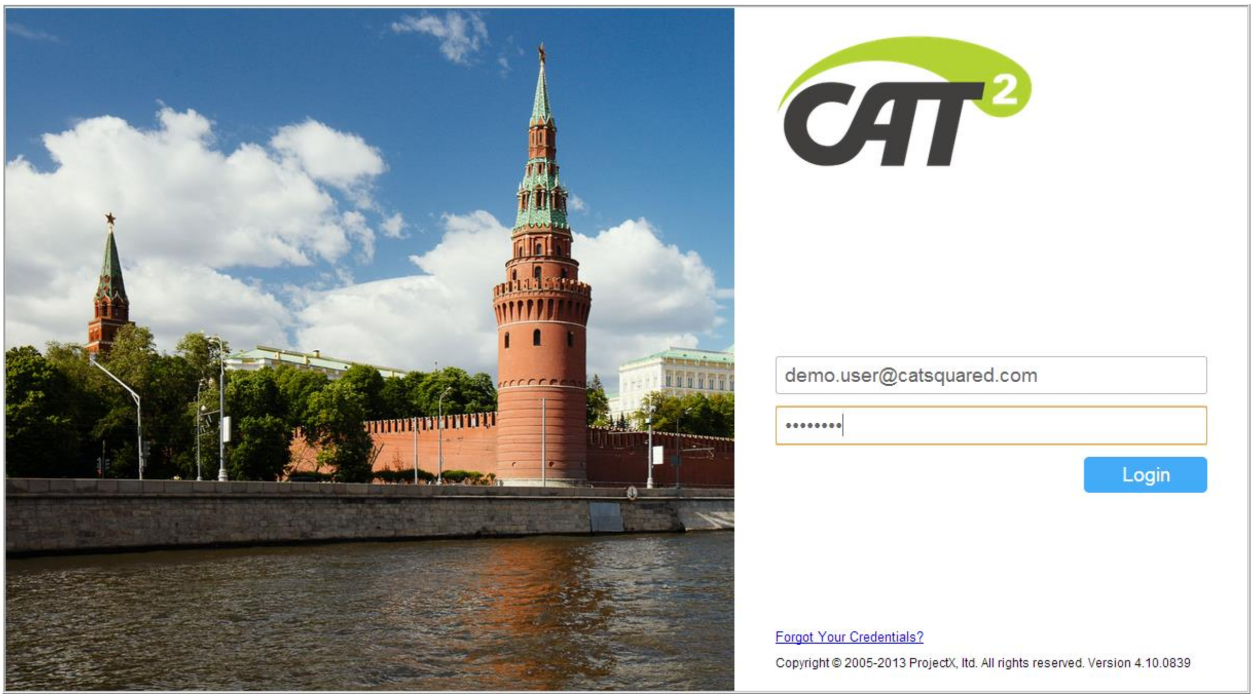
Logging into the Customer Portal

When logging into CAT²'s Customer Portal for the first time, you will need to open the email you received from **CAT² Support** that contains your username and initial password, as well as the URL to the CAT² Customer Portal.



1. Click the URL in your email to open the page in a web browser.
2. Enter the **Username** from your email.
3. Enter the **Password** from your email.
4. Click **Login**.

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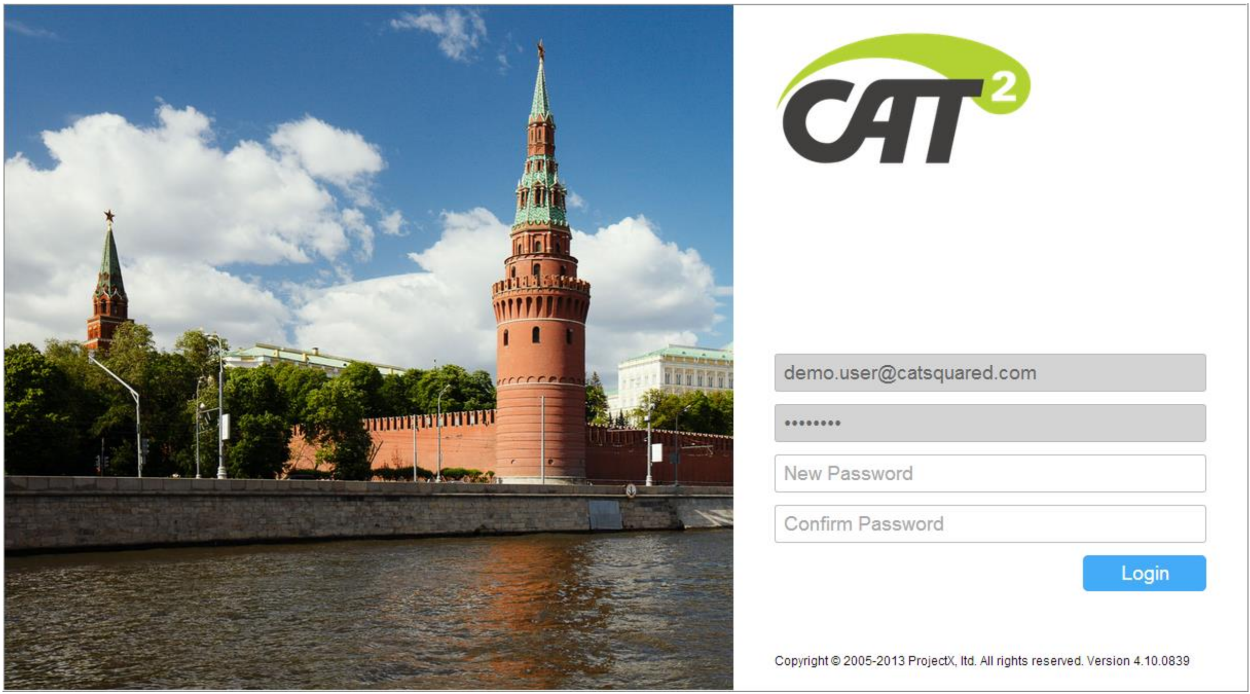

> **NOTE:** If you have already reset your password and the Customer Portal opens to the welcome page, skip steps 5 through 7.

5. Enter a New Password.

> **NOTE:** The password must be a **minimum of 6 characters** and **contain 3 of the 4** following conditions:
>
> - a lowercase character
> - an uppercase character
> - a number
> - a symbol

6. Enter your new password again to **Confirm**.

> **NOTE:** Once you reset this password, the original password in your email from CAT^2 Support will no longer work to log in.

7. Click **Login**.

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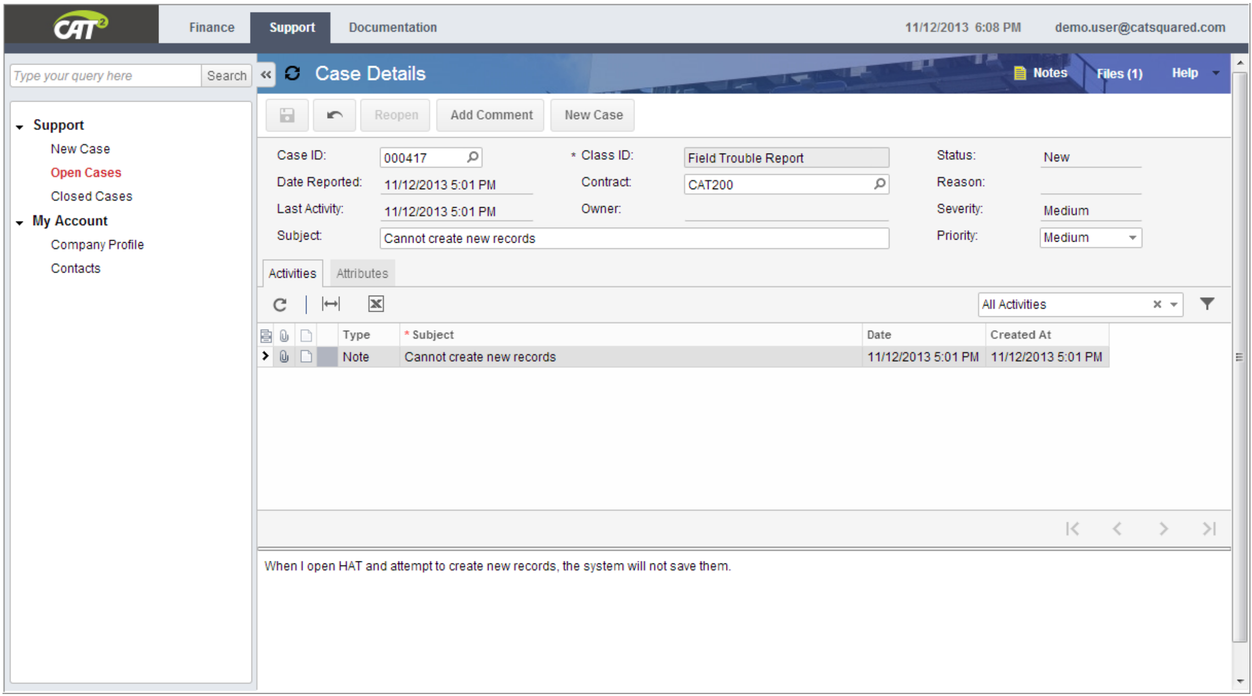
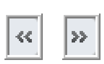
Overview of the Customer Portal

Before beginning, we recommend that you read this overview and familiarize yourself with the layout of the Customer Portal.



- There are three tabs in the Customer Portal. This Quick Start Guide only addresses the Support tab (see note below).
- Functions for each tab are located in the panel on the left side of the screen. You can also click the arrows button on the edge of the panel to hide or open the panel. 
- All functions are organized within categories, and you can click a category to expand or minimize the functions belonging to that category.

NOTE: For this Quick Start Guide, we are only working in the **Support** tab. We will eventually implement the **Finance** and **Documentation** tabs, and CAT² will send you updates as those functions become available.

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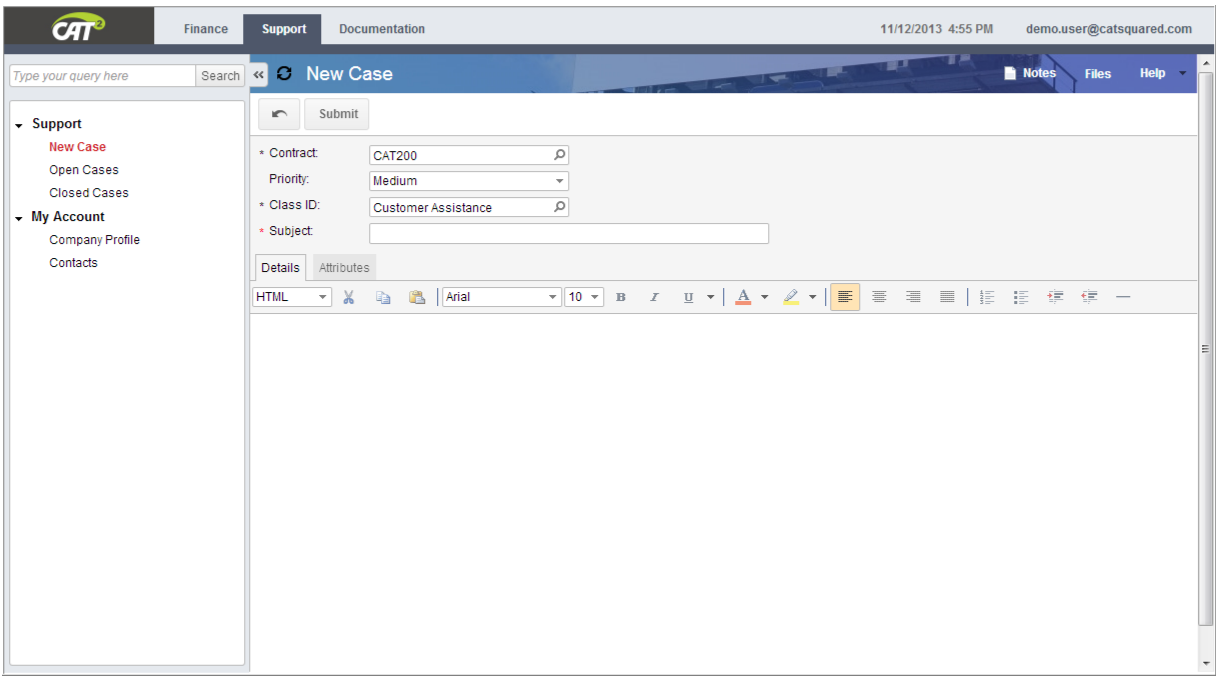
Creating New Cases

What you may have called “tasks” in the old CAT² help desk are now called Cases in the Customer Portal. Cases are used to report and manage field trouble reports, RMAs, enhancement requests, questions, etc.

> **NOTE:** Once you have created and submitted a new case, you will only be able to add comments, notes, and files. You will not be able to modify open cases in any other way without contacting CAT² Support.



1. To create a new case, click **New Case** under **Support** in the left panel.

> **NOTE:** If the **Support** and **My Account** categories are not visible in the left panel, you may have to click the **Support** tab that is located along the top of the screen. If the panel itself is not visible, click the arrows to open the panel. »

2. If a contract is not automatically populated, click the magnifying glass in the field by **Contract**, select a contract in the list, and click **Select**.
3. Click the drop-down arrow by **Priority** and select a priority level from the list.

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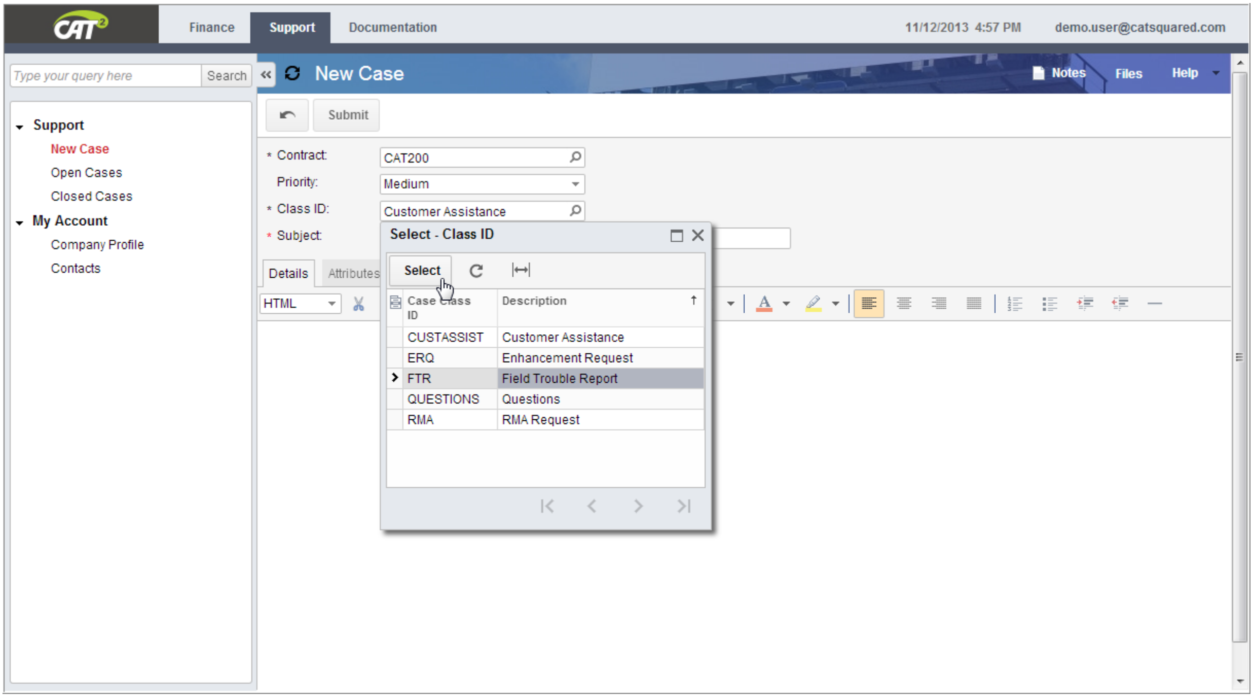
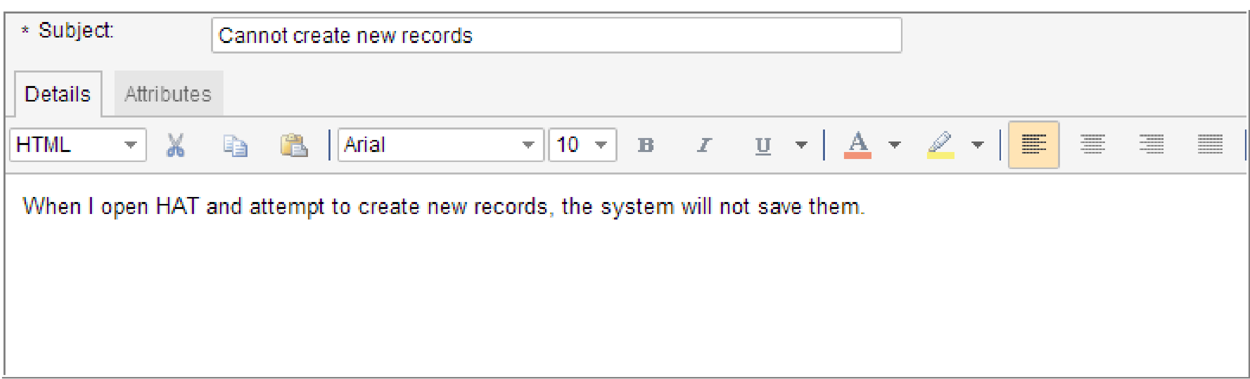


4. Click the magnifying class in the field by **Class ID**, select the option that best describes the new case, and click **Select**. (Customer Assistance, Enhancement Request, Field Trouble Report, etc.).
5. Enter a **Subject** for the new case. This should be a short description of your issue or request.



6. In the text area under the **Details** tab, enter a detailed description for the case

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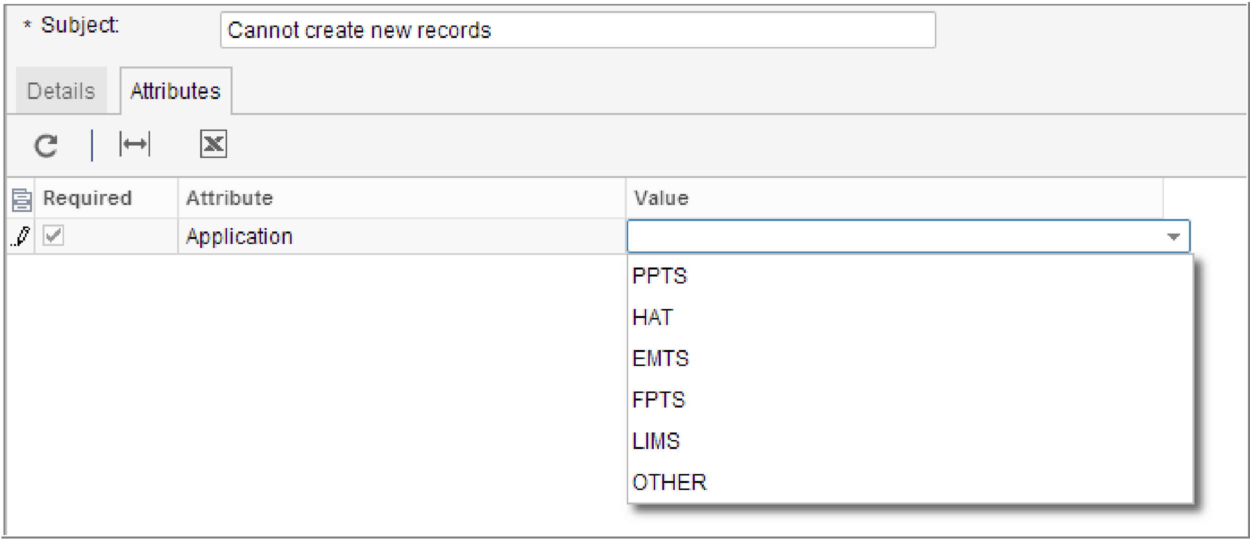
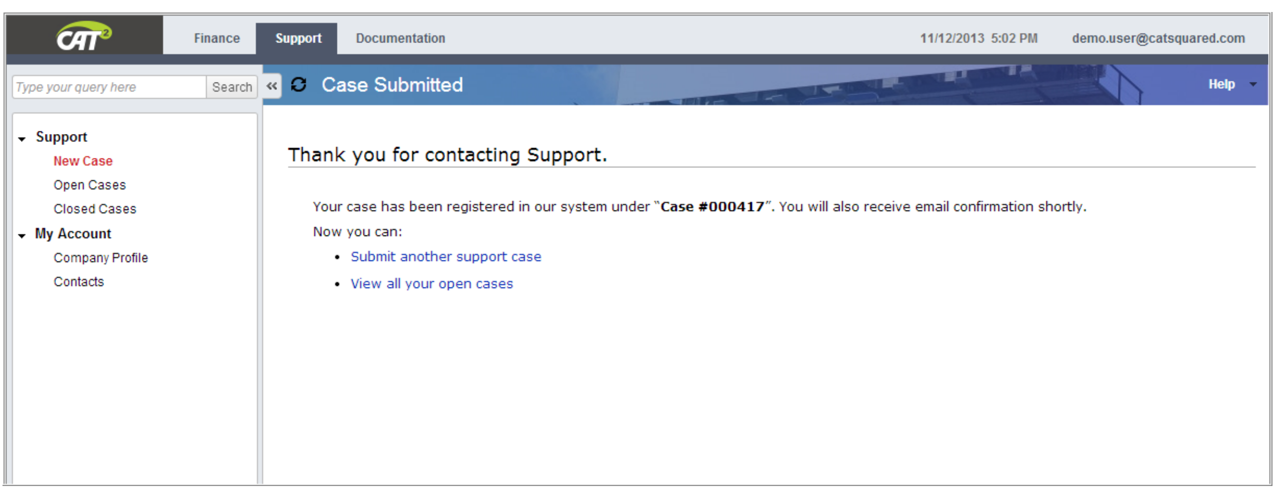


7. Under the Attributes tab, double click the field to the right of **Application**, under the **Value** header**.** Click the drop-down arrow that appears and select the program that the new case references.
8. To add a note to the new case, see [**Adding Notes to Cases**](#).
9. To add a file to the new case, see [**Adding Files to Cases**](#).
10. If finished, click **Submit** at the top of the screen.

> **NOTE:** To cancel the new case, click the **Cancel** button  , which is next to the **Submit** button at the top of the screen.



> **NOTE:** This confirmation screen will appear when the new case has successfully been submitted.

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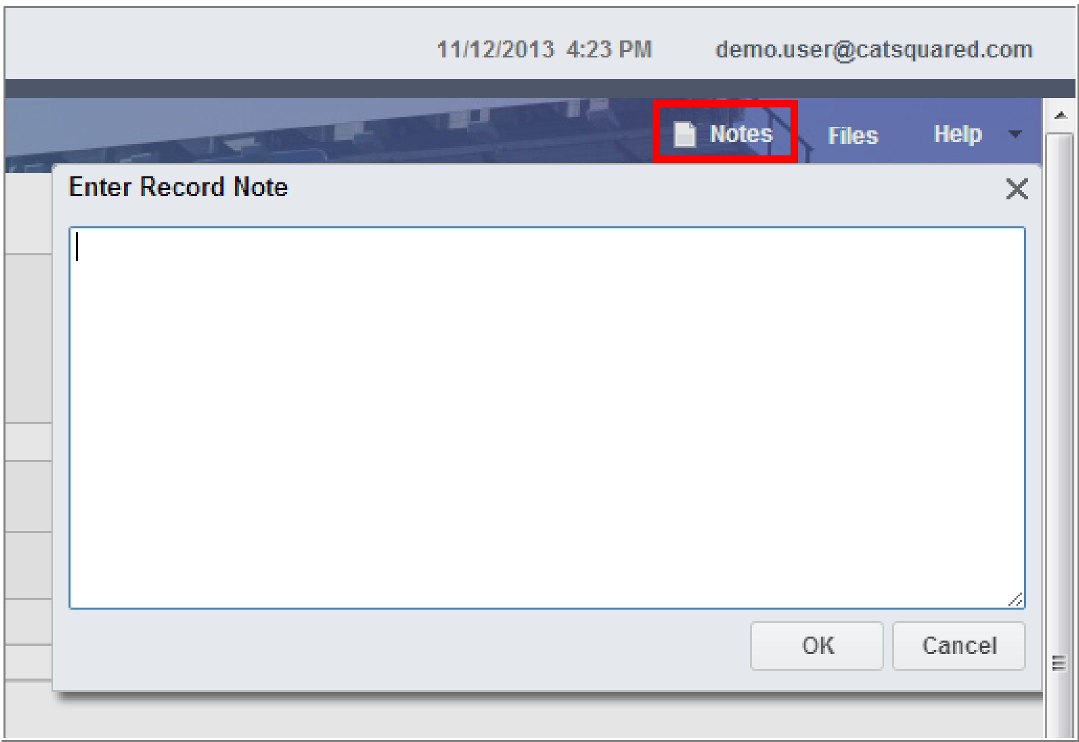
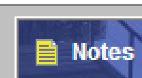
Adding Notes to Cases

Notes are assigned to the case as a whole and can be viewed and modified while the case is open. Although this is an option in the Customer Portal, we recommend that you add comments to open cases instead, since they are time stamped with a specific date and time (see [Adding Comments to Open Cases]).



1. Within a new or open case, click the **Notes** button in the upper-right corner of the screen.
2. In the window that appears, enter the note.
3. Click **OK**.

NOTE: The Notes icon will be yellow when a note is attached. 

4. To add a file to the case, see [Adding Files to Cases].
5. If finished with [creating a new case], click **Submit**.

   -OR-

   If finished with adding to an open case, click the **Save** button. 

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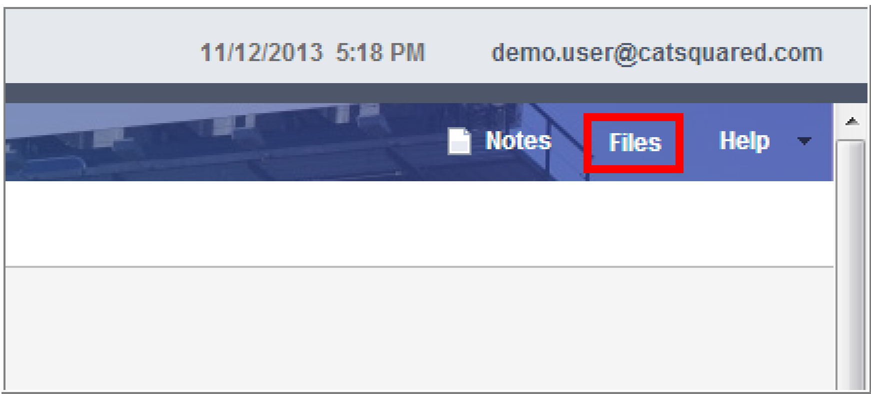
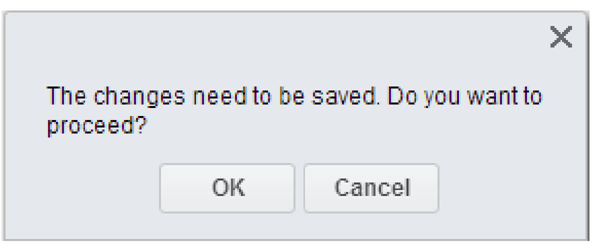
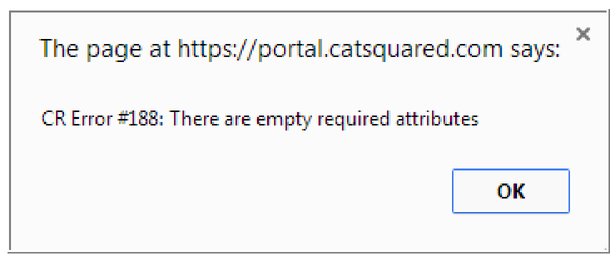
Adding Files to Cases

You can attach files to cases for reference. A few examples of files that you may attach to cases are screenshots, Excel documents, images, and PDFs. Although you may add and view files in new and opened cases, you will not be able to remove them once uploaded.



1. Click the **Files** button in the upper-right corner of the screen.





2. If you are prompted to save changes (see left image above), click **OK**. If you then receive an error for empty required attributes (see right image above), click **OK**, complete the required fields in the case, and begin with step 1 on this page again.

NOTE: You can only add attachment files after the required case information is complete. (Contact, Class ID, Subject, & Attributes)

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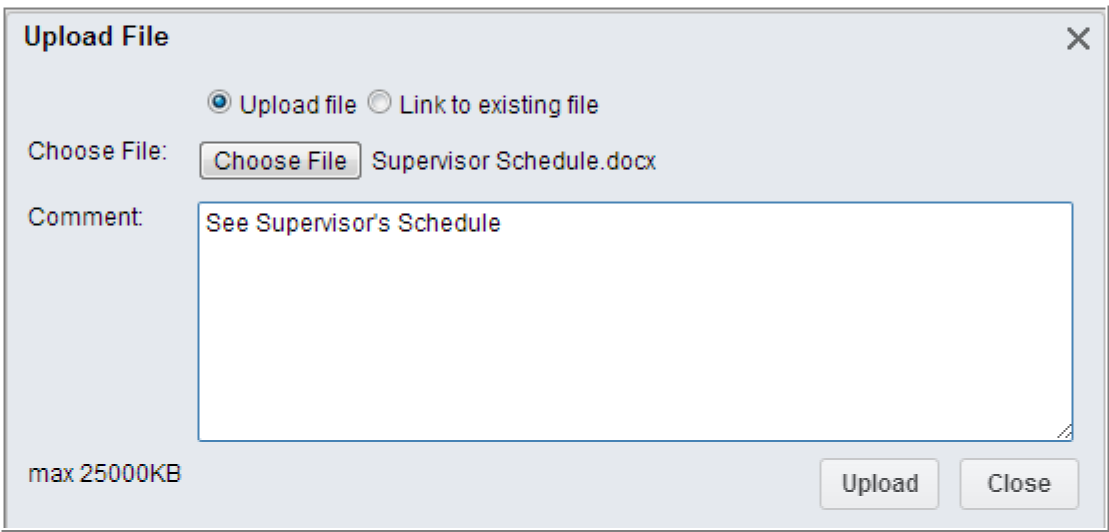
3. In the **Files** window, click the **+** icon.



> **NOTE:** The option **Link to existing file** is not available at this time. Use **Upload file** to attach files to cases.

4. Click **Choose File**, navigate to the file, and click **Open**.
5. Enter a **Comment** to describe the file.
6. Click **Upload**. The file will now appear in the **Files** window.

> **NOTE:** Once you have uploaded a file, you will not be able to edit or remove it.

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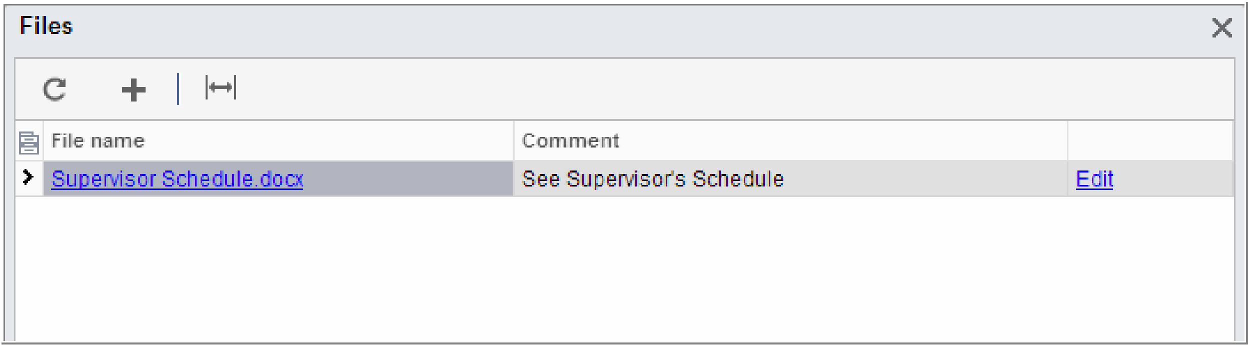
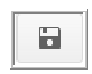


7. You can view the uploaded file by clicking the **File name**.
8. Once you are finished uploading and viewing files, close the **Files** window. The total number of files now attached to the case should appear by the **Files** button.

9. To add notes to the case, see **Adding Notes to Cases**.
10. If finished with creating a new case, click **Submit**.

    -OR-

    If finished with modifying an open case, click the **Save** button. 

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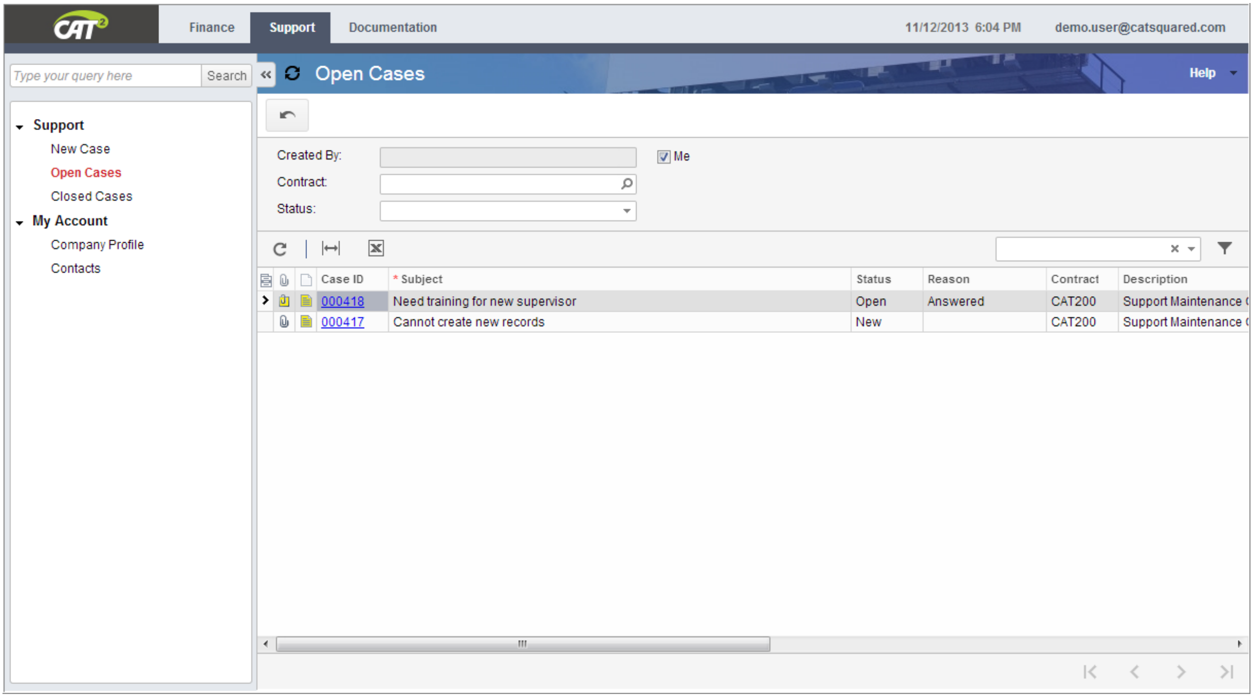
Viewing Open Cases

You can search and view details for open cases in the Customer Portal.



1. To view open cases, click **Open Cases** under **Support** in the panel.

> **NOTE:** If the **Support** and **My Account** categories are not visible in the panel, you may have to click the **Support** tab that is located along the top of the screen. If the panel itself is not visible, click the arrows to open the panel. 

2. To search for open cases created by you, select **Me** by the **Created By** field.
3. To search for open cases created by a particular person, deselect **Me**, click the magnifying glass by **Created By**, select the person's name or ID in the list, and click **Select**.
4. To search for open cases with a specific contract, click the magnifying glass by **Contract**, select a contract in the list, and click **Select**.
5. To search for open cases with a specific status, click the drop-down arrow by **Status** and select a status in the list.

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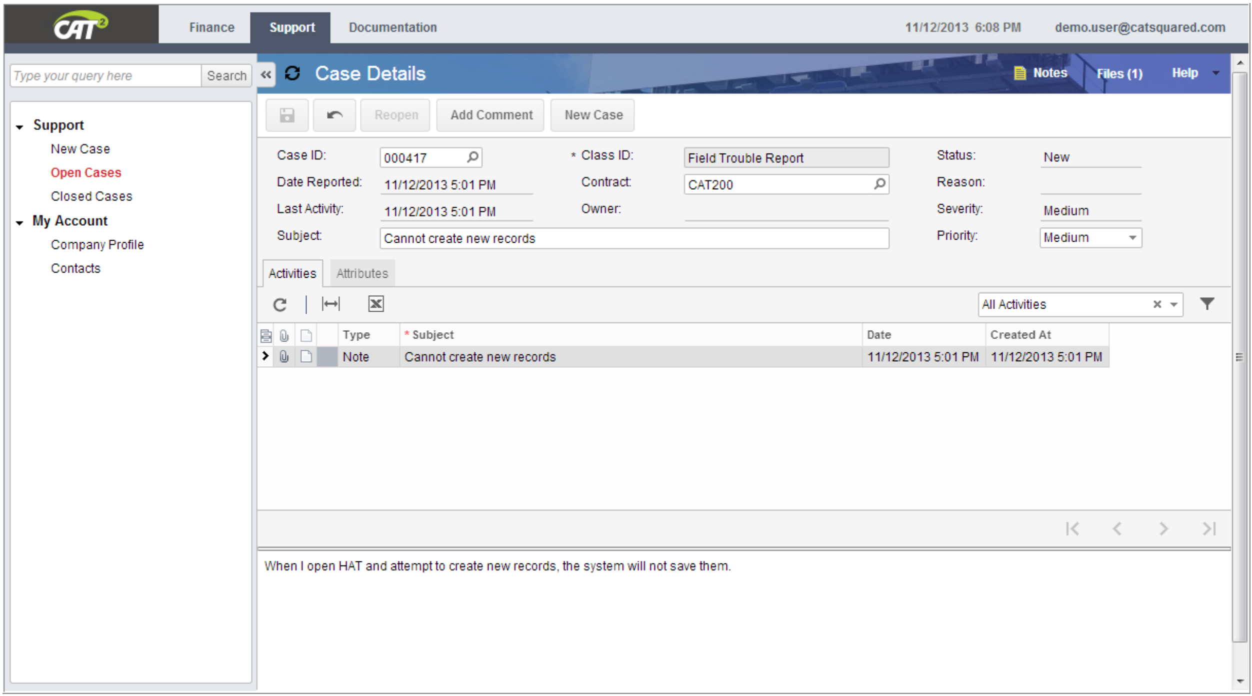
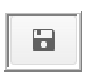
6. To view a case's details, click the **Case ID** Number.



7. To view notes attached to the case, click the **Notes** button (to add or edit notes, see **Adding Notes to Cases**).
8. To view what files are attached to the case, click the **Files** button (to add or view specific files, see **Adding Files to Cases**).
9. To add comments to the case, see **Adding Comments to Open Cases**.
10. If any files, notes, or comments have been added to the open case, click the **Save** button. 
11. To return to the list of cases from a case's details, click **Open Cases** in the panel.

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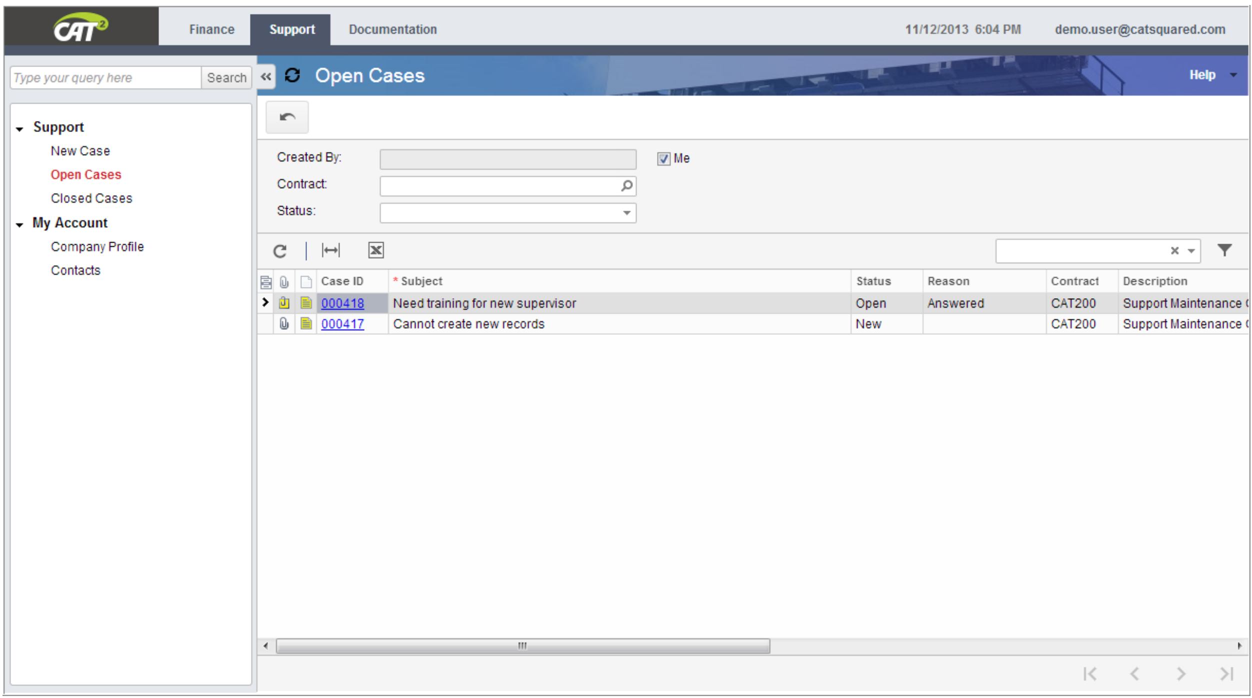
Adding Comments to Open Cases

Comments are time stamped with a specific date and time for a case, which makes them easier to track than notes. Once you have submitted a new case, you can only add comments, notes, and files to open cases.

The directions below are for adding comments to open cases. To add notes to an open case, see **Adding Notes to Cases**. To add files to an open case, see **Adding Files to Cases**.



1. On the **Open Cases** page, click a **Case ID** number to open the **Case Details** page.

NOTE: To search for a specific case, see **Viewing Open Cases**.

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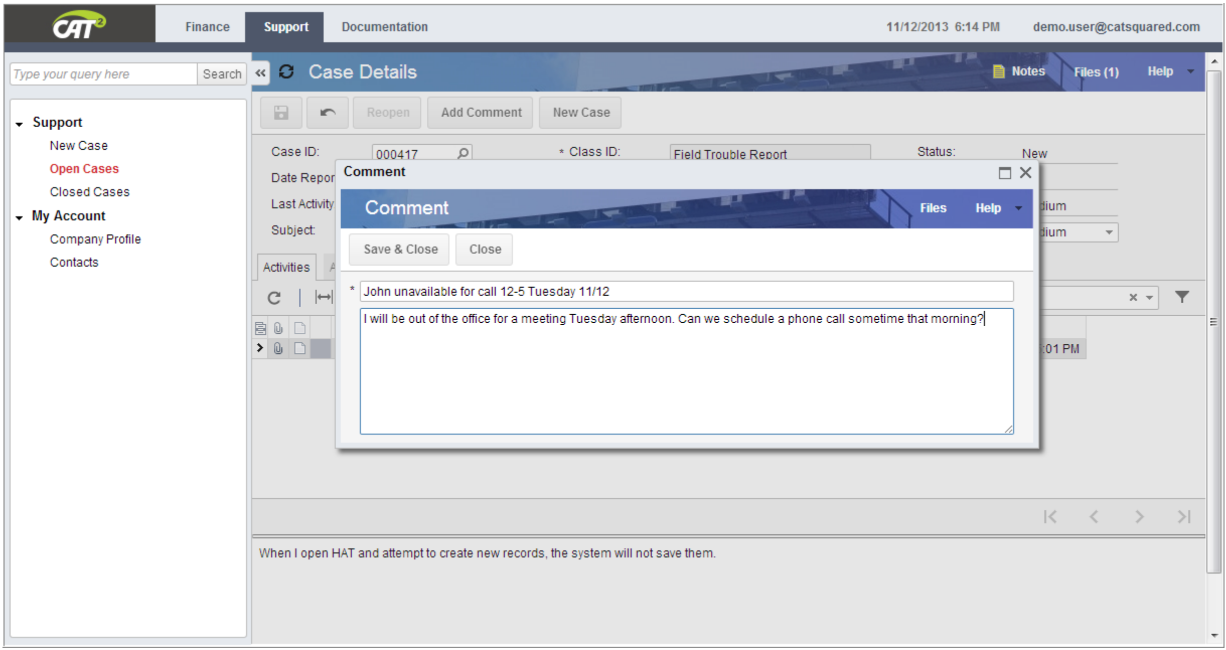
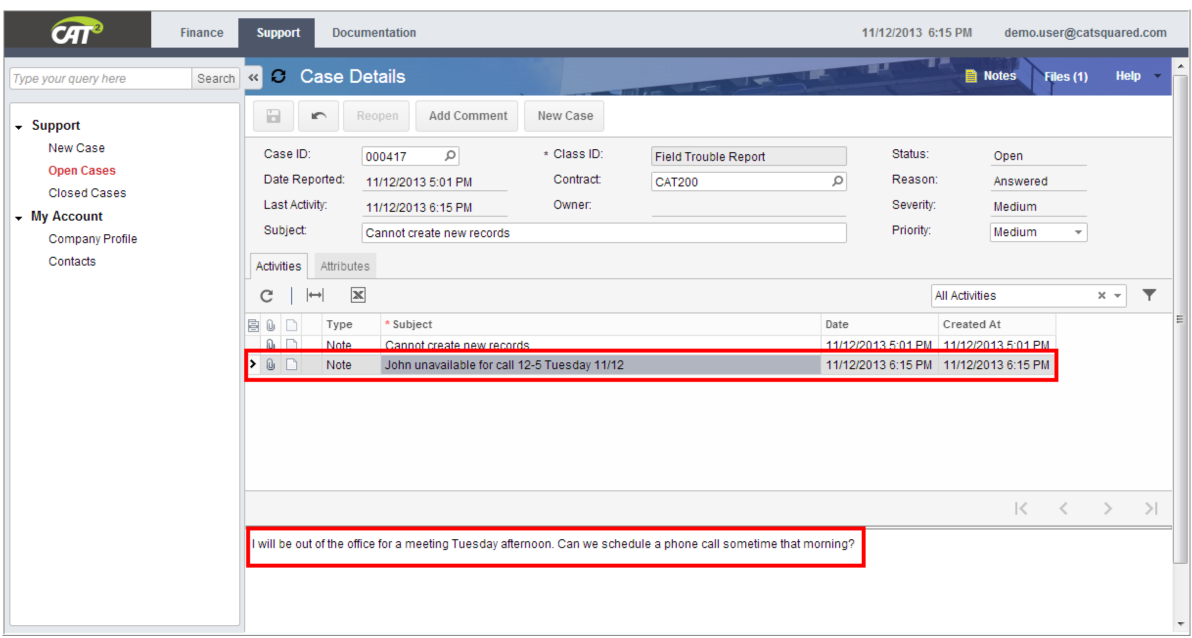


2. Click Add Comment.
3. Enter a subject in the subject bar.
4. Enter the comment in the main window.
5. Click Save & Close.



NOTE: Once the comment is created, you can select it under the **Activities** tab and view the content in the window beneath.

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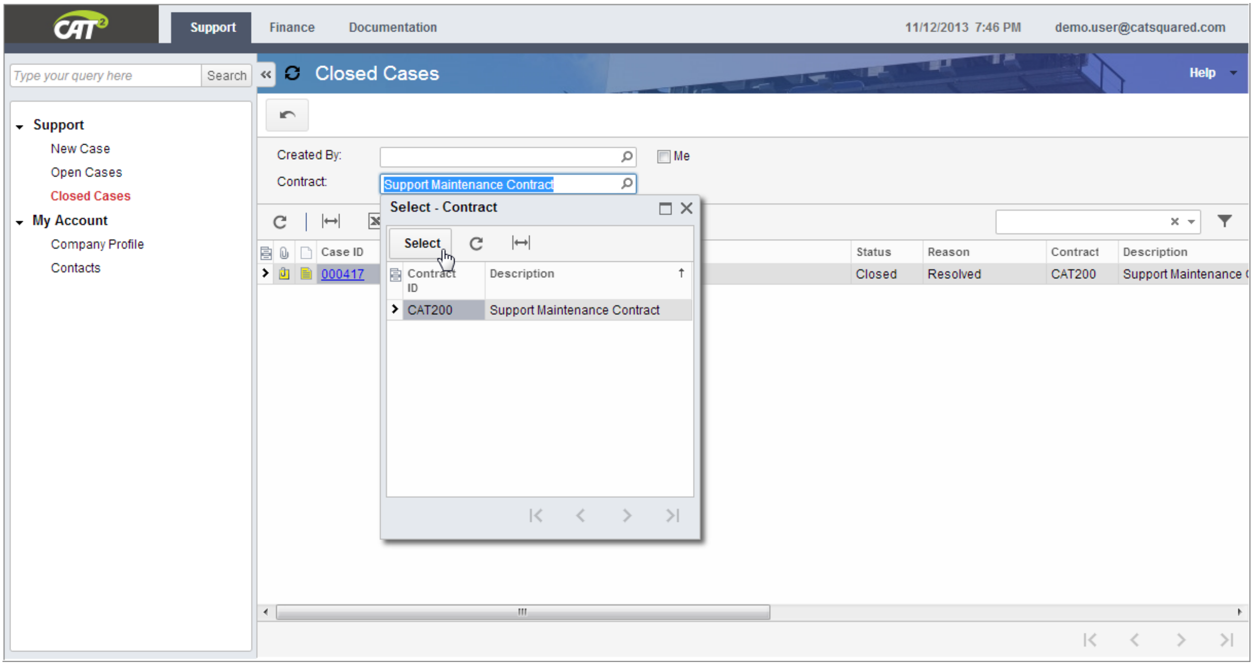
Viewing Closed Cases

You can search and view closed cases in the Customer Portal. Once cases are closed, you can still add notes and files, but we do not recommend you do so without first reopening the case (see **Reopening Cases**).



1. To view closed cases in the Customer Portal, click **Closed Cases** under **Support** in the left panel.

> **NOTE:** If the **Support** and **My Account** categories are not visible in the panel, you may have to click the **Support** tab that is located along the top of the screen. If the panel itself is not visible, click the arrows to open the panel. 

2. Click the magnifying glass in the field by **Contract**, select a contract in the list, and click **Select**.

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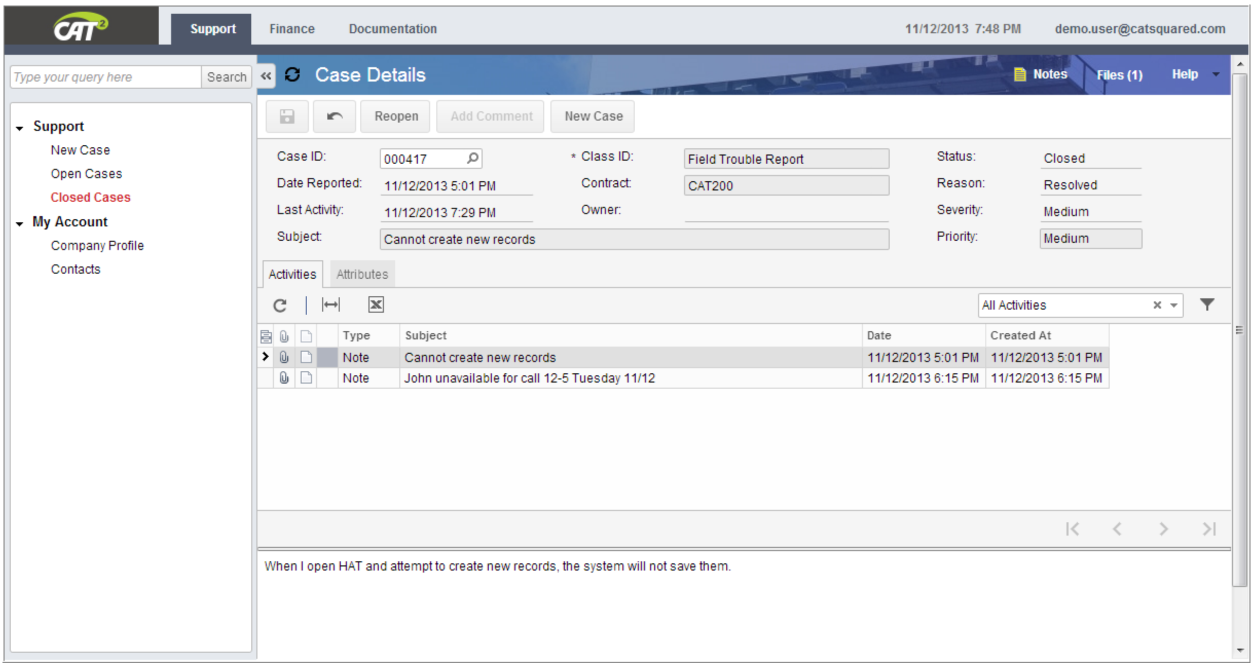
3. To search for closed cases created by you, select **Me** by the **Created By** field.
4. To search for closed cases created by a particular person, deselect **Me**, click the magnifying glass by **Created By**, select person's name or ID, and click **Select**.
5. To open a closed case and view the details, click the **Case ID** number.



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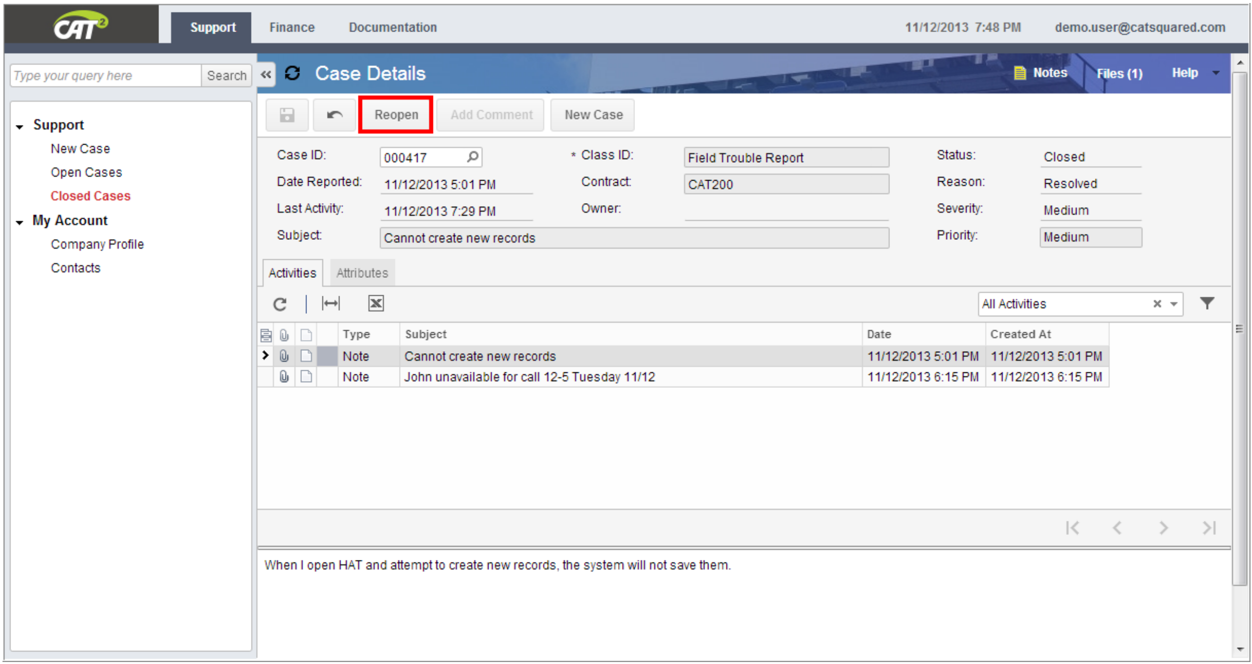
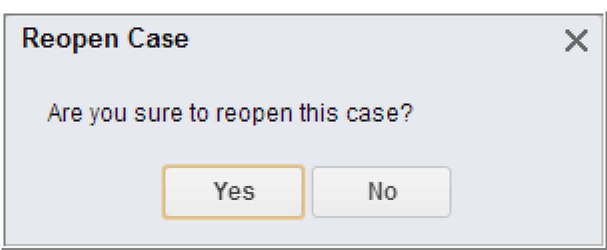
Reopening Cases

Although you cannot modify details for cases once they are closed, you can reopen them if there is still an item that needs to be addressed.



1. On the **Case Details** page of a closed case (see **Viewing Closed Cases**), click **Reopen**.



2. If you are sure you want to reopen the case, click **Yes**.

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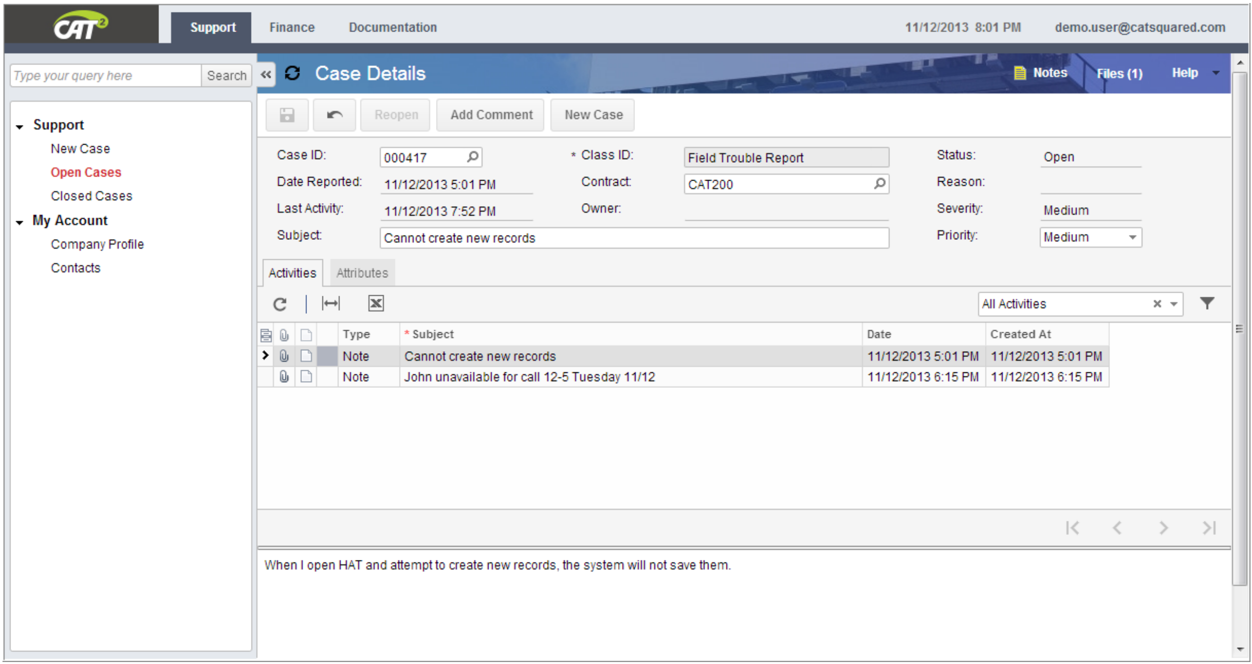

NOTE: The case will move to open cases and allow comments to be added again.

3. To add a note to the case, see [Adding Notes to Cases](#).
4. To add a file to the case, see [Adding Files to Cases](#).
5. To add a comment to the case, see [Adding Comments to Open Cases](#).

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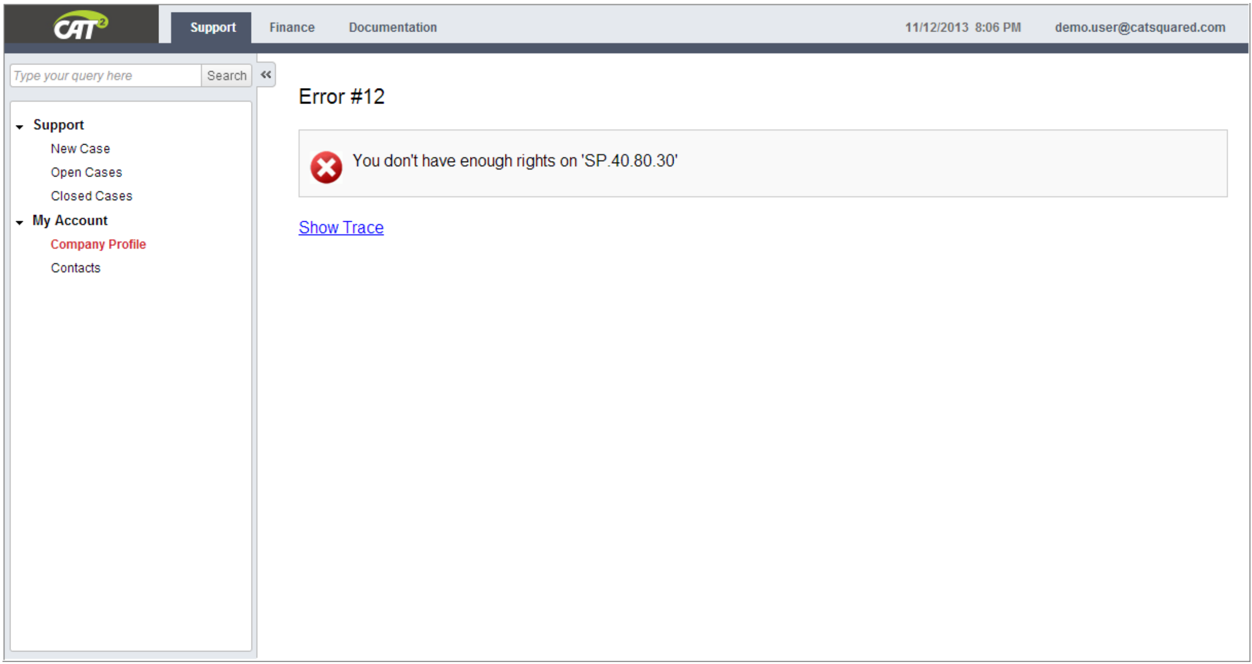
Viewing the Company Profile

We will update you when the Company Profile has been documented; however, not all users may have access to view the company profile.



NOTE: If this screen appears when you click **Company Profile** under **My Account** in the panel, you do not have access to view this page.

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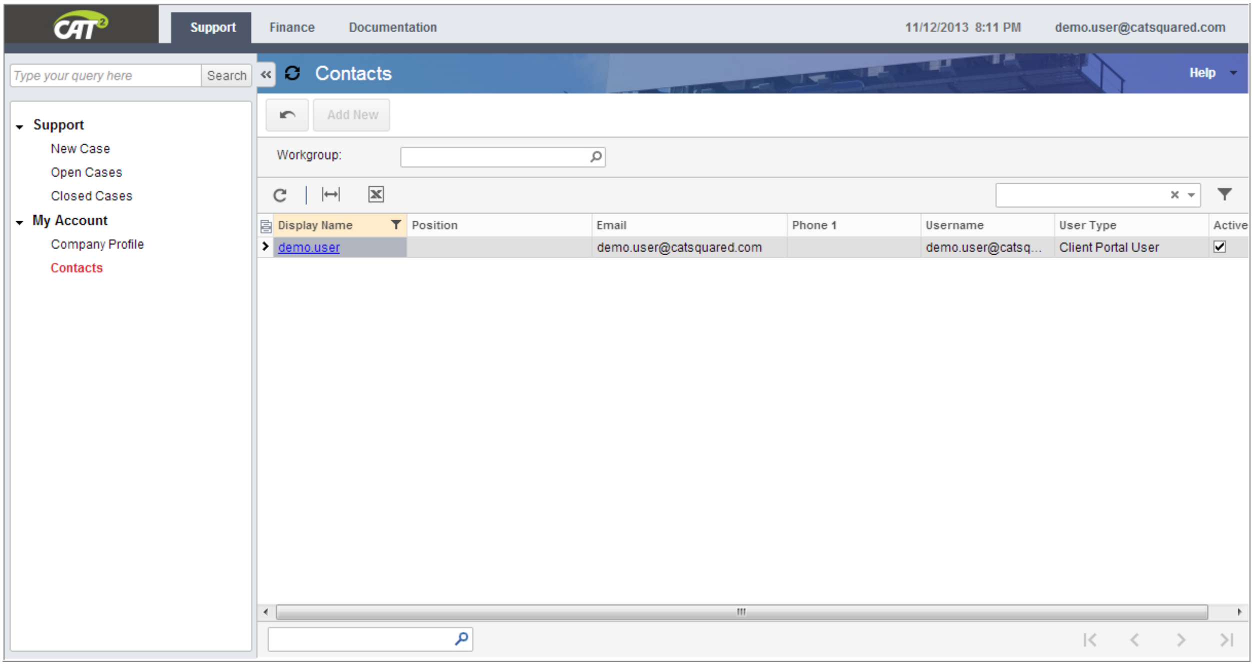
Viewing Company Contacts

You can search and view contacts for your company in the Customer Portal. Contacts can only be modified by CAT² Support at this time.



1. To view your company contacts that are in the Customer Portal, click **Contacts** under **My Account** in the left panel.

> **NOTE:** If the **Support** and **My Account** categories are not visible in the left panel, you may have to click the **Support** tab that is located along the top of the screen. If the panel itself is not visible, click the arrows to open the panel. 

2. To search for contacts according to their workgroup, click the magnifying glass by **Workgroup**, select an option in the list, and click **Select**.
3. To view the contact details, click the contact's **Display Name** in the list.

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