



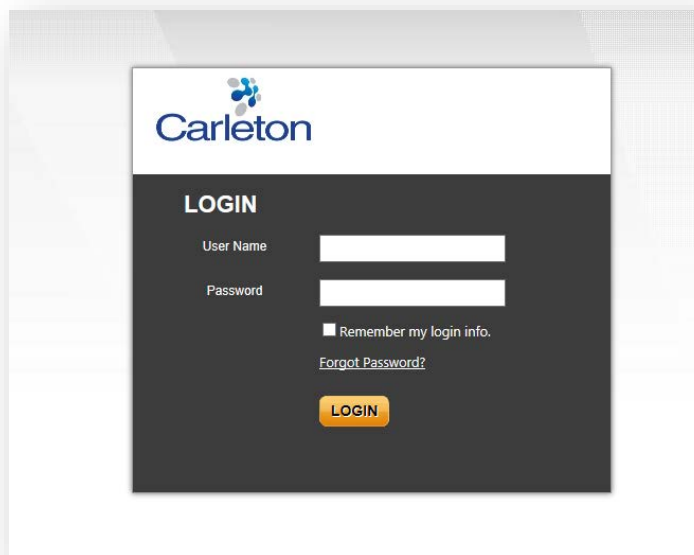
Using Carleton's Customer Web Portal

Below are instructions for leveraging Carleton's Customer Web Portal to help your organization more effectively create tickets for new client setups, change requests, receive support for calculation issues, request enhancements, ask general questions or address any other functional issues you may be having.

By describing the issue thoroughly and attaching supporting documents, our team of customer service representatives can assist your organization in resolving issues more quickly. The document attachment feature allows you to attach files. This will allow a user to attach any supporting documents needed to address requests.

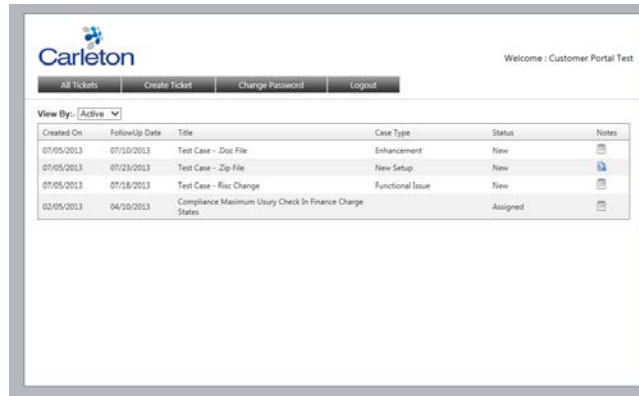
At any point in time your organization can see the status of all issues reported or view them by the user who entered the ticket.

To get started, please go to <https://portal.carletoninc.com/>

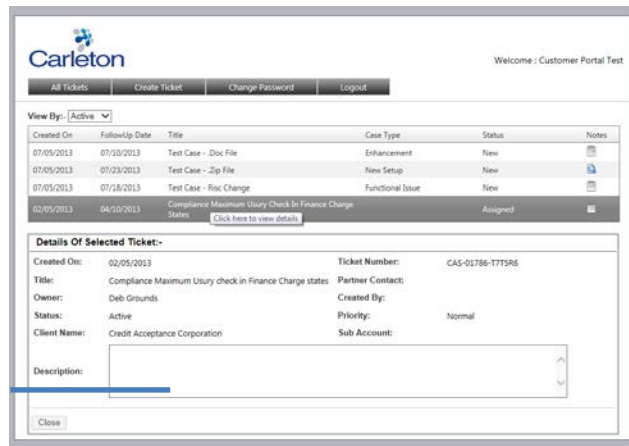


On the login screen enter your username and password that was given to you by your Carleton Customer Service Representative. The password can be changed using the Change Password option once logged in.

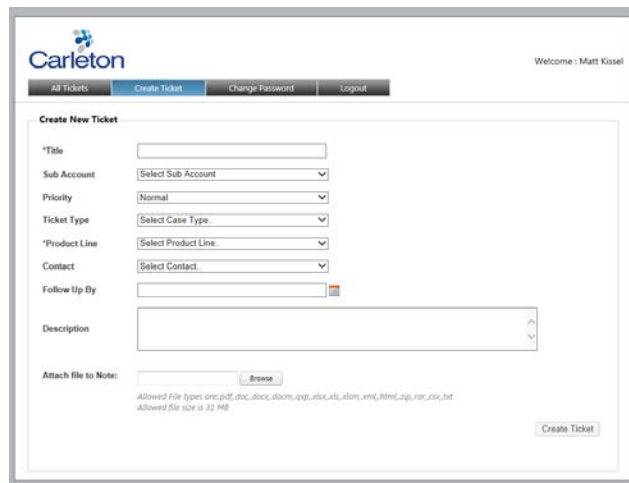
When you login you will see "All Tickets" which are open for your organization. This will show all of the Open Cases Carleton is tracking. You can also view My Tickets by selecting this from the same drop down.



You can see more detailed information regarding a given Ticket by clicking on the ticket in the list.



To create a new Ticket, click the Create Ticket button in the upper menu bar.



TITLE (required)- Enter the title of the case. Please use the File Name or Form Title that is being used on the Printing Conditions or Delivery Status spreadsheet. This will enable us to refer to the correct form. Ask your Customer Service Representative for this list if you do not have it.

SUB ACCOUNT – Select the drop down menu and choose the sub account. For some clients this menu will be empty.

PRIORITY – Please indicate the level of priority for the defect or change request.

TICKET TYPE – Indicate what type of ticket you are issuing. Example: Change Request, Functional Issue (defect).

PRODUCT LINE (required) – Choose the Carleton product line from the drop down menu. If this ticket is a forms defect or change request, please choose **SmartDocs – Forms**.

CONTACT – Select the Contact at your organization to follow up with.

FOLLOW UP BY – Select the date you would like to be followed up by (due date).

DESCRIPTION – Please copy and paste from the Change Request/Defect form explaining what the defect or change request is. This will also show up on your organizations portal list and will make it easier to identify what each ticket represents.

ATTACH FILE TO NOTE - You can attach up to five files to help Carleton expedite its review of the change. Allowed File types are:

- CSV
- DOC
- DOCX
- DOCM
- HTML
- QXP
- RAR
- TXT
- XLSX
- XLS
- XLSM
- XML
- PDF
- ZIP
- Allowed file size is 31 MB


CREATE TICKET - Click the create ticket button and a Case will be automatically opened on the Carleton project tracking system.

FAQ

How do I notify Carleton that a Change Request or Defect is resolved?

- Login to the web portal and open the original ticket.
- In the “Details of Selected Ticket” choose RESOLVED in the drop menu of STATUS.
****NOTE**** Only the creator of the ticket can change this status.
- Carleton will be notified of the status change and the ticket will no longer appear as ACTIVE.

I created and submitted a ticket and forgot to add the attachments. How do I attach it?

- Login to the web portal and open the original ticket.
- Click on the clipboard icon under the NOTES column → 
- In the top right corner, click on “**Click here to create new Note**” (blue font)



- Enter what the attachment is in the **TITLE** field (required). Example: Screenshot from application showing defect.
- Add any special notes if necessary in the **NOTES** field (not required)
- Click the **BROWSE** button to retrieve the attachment
- Click "**CREATE NEW**" to attach the attachment to the ticket.
- You should then receive a message that the "**Note was created successfully.**"