CADGROUP

Cadgroup Web Portal

USER GUIDE

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Welcome to the Cadgroup Web Portal!

You would have received an email link letting you instantly log in to your Web portal profile.

After logging into the Client Portal, your home screen provides you with a feed of recent activity, and on the left, additional items that may be of interest to you.

Key Benefits to you

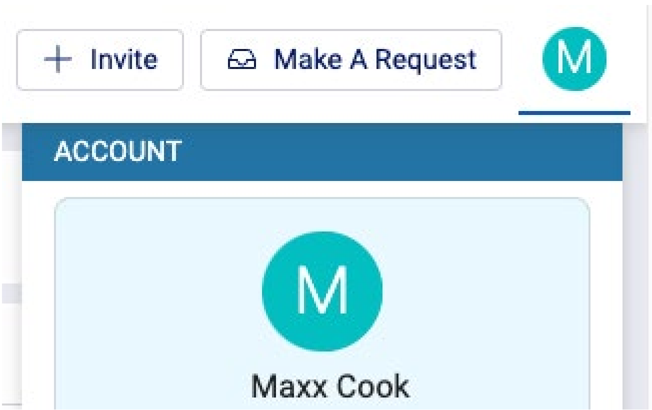
- Overview of current and past project work
- Review current project schedules.
- Create, update, and review historic support tickets.

Viewing your Profile

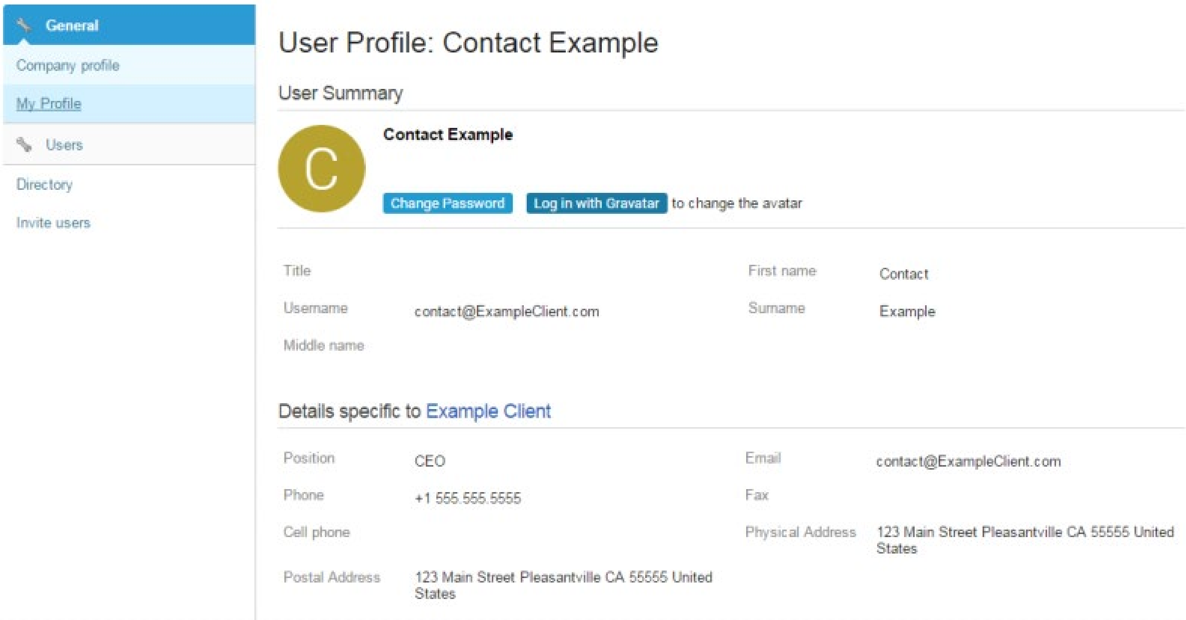
Your profile houses all your contact, business, and personal information. You can edit this information at any time directly from the Client Portal.

To view and edit details of your personal Profile:

1. Clicking on your **User Icon**, a menu will be displayed.

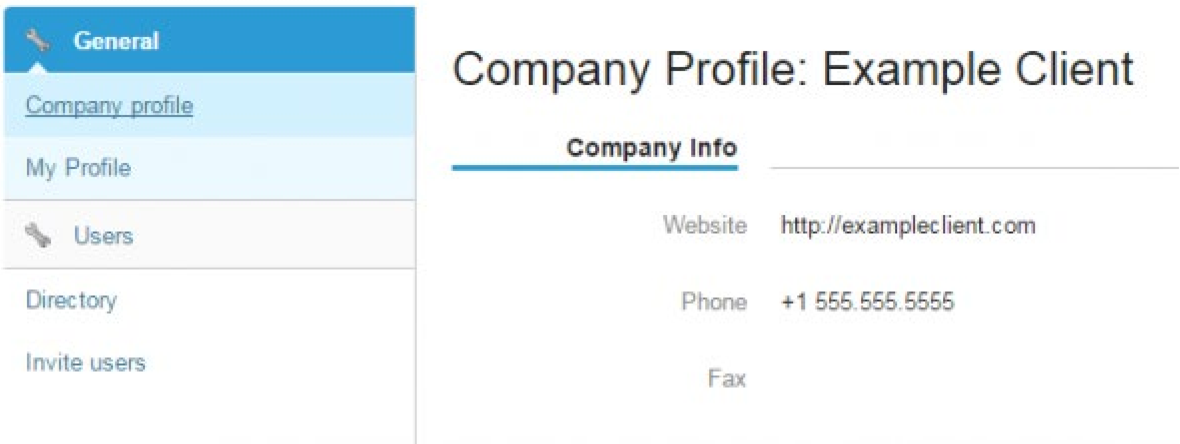


2. Click on the first option on the list, **Profile**.
3. This will take you to your user profile. From there, you can edit your personal and business details by clicking on the field. If you would like to add a user icon, you can log in with a Gravatar account if you have one.



To view and edit details of your Client Profile:

1. Clicking on your **user icon**, a menu will be displayed.
2. Click on the first option on the list, **Profile**.
3. Then, choose the first option in the **Configuration Menu**, **Company Profile**.



4. From there, you can **edit** your **business details**, including your **website**, **phone**, and **fax.**

Change Password

To change your password:

1. From user profile page, simply click the **Change Password button** and fill in the details.

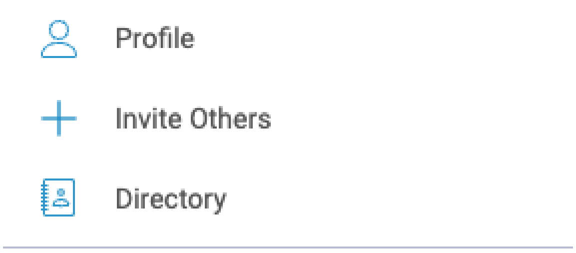
Invite your Peers!

Anyone you invite will receive a special invitation link that gives them access to their own account in your portal. Keep your co-workers and other relevant parties up to date with work completed on your account.

To grant access to other users:

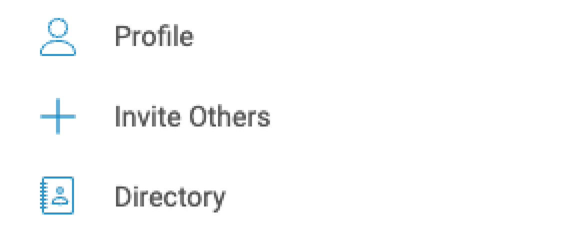
1. Use the **Invite + button** displayed in the navigation bar by your User Profile Icon.

2. Alternatively, you can invite coworkers by clicking your **user icon** and selecting **Invite Others**.



User Directory

Your user directory displays all users that have been given access to this client portal. You can access this by clicking on your **user icon** and selecting **Directory**.

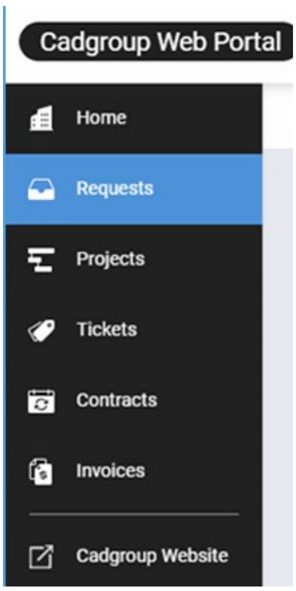


Make a Request

Contact Cadgroup directly without needing to open any other programs. If you have a question or want an update on a task, simply click **Make a Request**. It is the equivalent of contacting support directly.

To make a request, click the **Make a Request button** on the navigation bar next to your user icon. Click this to open a pop-up that will allow you to send a request to Cadgroup Support.

Keep track of the requests that you have submitted by clicking **Requests** on the menu bar on the left-hand side of the screen.



You will see a list of all submitted Requests for everyone who has permission for this Client Portal. To see specific details of the Request, click on the Request Title.

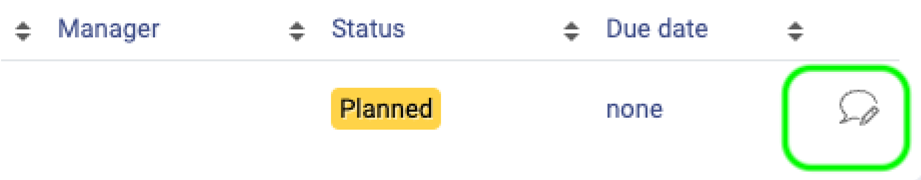
Track Progress

Easily track all ongoing work on open requests, projects, and support tickets. To see the progress of ongoing work, click on the name in the Menu Bar.

For instance, if you want to see an update on an ongoing project, click on Project. When you click on Project, you will see a **Project List** of all open projects, including the **Title**, **Manager**, **Status**, and **Due Date**. To see more details of the **Project**, click on the **Title Name**.

Once you are viewing the **Project**, you can see details of the work completed against the **Project**. Take your time to look through each tab to see what is included, including **Budget** & **Work**, **Attachments**, etc.

If you want to leave a note about this specific Object, click on the create a note button and select **Create a Note**. By sending a note, the manager of the project will be notified via email, boosting collaboration and transparency.



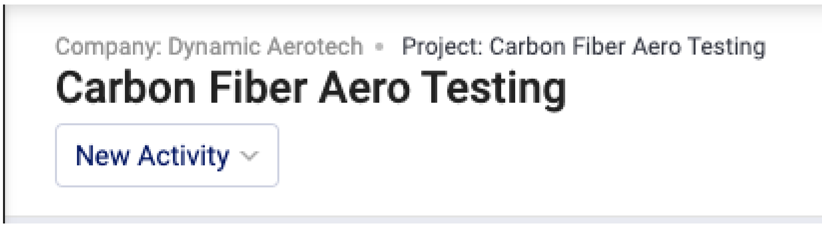
Create An Activity

Create activities directly from your client Portal, helping you communicate directly and stay on top of all ongoing work.

When you view any ongoing work - such as a Project, Issue/Ticket, - you will see an option to add a New Activity.   Creating an activity will notify the assignee/manager of your comments, allowing you to keep all your correspondence tied directly to the ongoing work.

To create an activity:

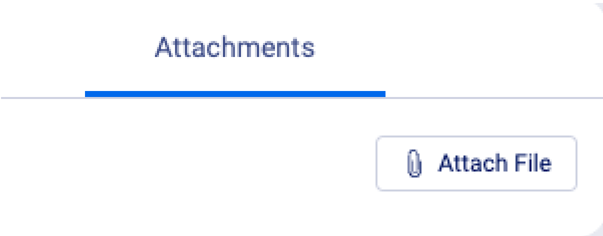
1. Alternatively, while viewing the Project itself, select the **New Activity button**.



2. This will open a pop-up box where you can enter the note details.

Securely Share Files & Attachments

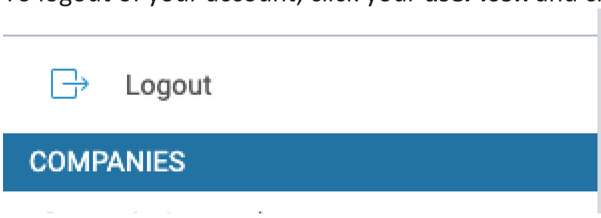
You can easily add an attachment directly to any **ongoing work** under the **Attachments tab**. This is perfect for situations where you need to upload revisions or large documents that are a pain to email - now they can stay inside your portal. To add a file, you must be on the screen viewing the project, ticket, request, etc. that you want to add an attachment against. Once there, click on the Attachments tab, and you will see the option to **Attach File**.



Once you add an attachment it will be automatically stored to the project, ticket, etc and the manager will be notified that a new file has been uploaded.

Logging Out

To logout of your account, click your **user icon** and click on the **Logout** option.



Updated User Guide & Video Tutorial

Please visit the user guide online!