CAPSTONE TECHNOLOGY

Customer Portal

User Guide

Contents

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Introduction

The Support Portal is an online resource that allows access to the following:

- **Support Tickets:** View and open and closed support tickets submitted by you or others in your organization
- Product Downloads:
- **File Sharing:** Upload or download large files to or from our support them in a secure environment that may be required to support your product
- **Marketing Materials:** Download our Marketing Materials documents
- **Event Calendar:** Calendar of training events and In-person conferences
- **Community Forum:** Links to our dataPARC Solutions Community Forum, the home our dataPARC Knowledge Base, Manuals, Webinars, and Community Discussions
- **Contact:** Displays our support and sales contact information (email and phone)
  Note: All of these options can be limited by your rights. If you find you are missing access to a needed option, please contact support.

Website

To access the customer portal navigate to the following URL: https://support.captech.net

It is highly recommended that you upgrade to an HTML 5 browser for best results.

How to Register

Follow these steps to register for the Customer Support Portal:

1. Launch the web browser
2. Navigate to the following URL: https://support.captech.net
3. Click the **Request Access** button
4. Complete all the data fields on the Request Access screen
5. Click the **Submit** button
6. You will receive an email from our support department within 24 hours that includes a link to the site, your username, and password
   Note: Please check your junk mail folder before contact support if you haven't received your email notification within a reasonable period of time

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How to Login

Follow these steps to login to the Customer Support Portal after receiving the confirmation email from support:

1. Launch the web browser
2. Navigate to the following URL: https://support.captech.net
3. Enter your username
4. Enter your password
5. Click the **Login** button

Main/Landing Page

The main page or landing page is the first thing a user will see when they log into the portal and it presents the user with all the options granted to them in the portal.
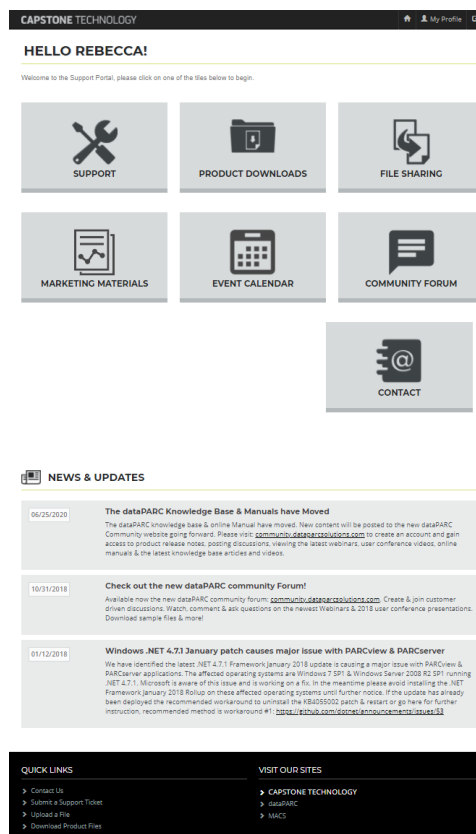
Category Tiles: There are tiles for each section of the portal that will allow the user to quickly jump to specific areas of the portal (up to seven tiles can be shown based on the user's security roles)

News & Announcements: This section will show the user the three most recent news/announcement items

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Site Footer
- "Quick Links" provide the user with shortcuts to get to commonly used pages
- The "Visit Our Sites" section has links to our Capstone Technology departmental websites

My Profile/Change Password

Update your profile information (name, telephone, job title, address) as well as change your password

Update Profile

Follow these steps to update your profile:

1. Click the **My Profile** button
2. Update any of the provided fields
3. Click the **Update Profile** button to save the profile changes

Change Password

1. Click the **My Profile** button
2. Click the **Change Password** button
3. Type your current password
4. Type the new password
5. Type the new password again to confirm
6. Click the **Save Changes** button
7. Password Saved Successfully Confirmation will appear
8. Click on any button to move to another section of the portal

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Support

The support section of the portal allows you to view active and closed support tickets, resolve an active support tick or request an update on an existing support ticket.

Open/Closed Support Tickets

The open or closed support ticket pages display a table of support tickets and relevant information

View Open Support Tickets

Follow these steps to view an open support ticket:

1. Launch web browser
2. Type https://support.captech.net
3. Login to the support portal using your user name and password
4. Click the down arrow to the right of the **Support** button
5. Select **Open Support Tickets**
6. Click the down arrow on the **Filter Support Tickets** button and complete the following fields
   a. Display Tickets Requested by: Make a selection from the available choices from the drop down list or search by a specific word or term
   b. Keyword or Ticket #: Type a word or the ticket number
   c. Select Contract(s): Make a selection from the available choices from the drop down list or search by a specific word or term
   d. Pick a Date: Make a selection from the available choices from the drop down list or search by a specific word or term
7. Click the **Update Results** button
   Notes: *Results that match your search criteria will be displayed in the table below.*

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View Closed Support Tickets

Follow these steps to view a closed support ticket:

Note: You will be able to view tickets related to outstanding issues and questions which require resolution or active requests for change if the change has been designated for a future release.

1. Launch web browser
2. Type https://support.captech.net
3. Login to the support portal using your user name and password
4. Click the down arrow to the right of the **Support** button
5. Select **Closed Support Tickets**
6. Click the down arrow on the **Filter Support Tickets** button and complete the following fields
   a. Display Tickets Requested by: Make a selection from the available choices from the drop down list or search by a specific word or term
   b. Keyword or Ticket #: Type a word or the ticket number
   c. Select Contract(s): Make a selection from the available choices from the drop down list or search by a specific word or term
   d. Pick a Date: Make a selection from the available choices from the drop down list or search by a specific word or term
7. Click the **Update Results** button
   Notes: *Results that match your search criteria will be displayed in the table below.*

Open a New Support Ticket

Follow these steps to open a new support ticket:

1. Launch web browser
2. Type https://support.captech.net
3. Login to the support portal using your user name and password
4. Click the down arrow to the right of the **Support** button
5. Select **Submit Support Ticket**
7. Complete all the fields in the Required Section of the Submit a Support Ticket Form
8. Complete any desired fields in the Options Section of the Submit a Support Ticket Form
   Notes: *You may upload any files that may be of help in resolving the support request. Refer to the File Sharing article below to learn how to upload files that are in excess of 50MB.*
9. Click the **Create Support Ticket** button
   Note: *You will receive a confirmation that the support ticket was successfully submitted. Links will be provided to perform the following actions: (1) View list of open Support Tickets. (2) Upload/Download Files (3) Submit Another Support Ticket.*

Request an Update for an Active Support Ticket

Follow these steps to open a new support ticket:

1. Launch web browser
2. Type https://support.captech.net
3. Login to the support portal using your user name and password
4. Click the **Support** button
5. Follow the steps to View Open Support Tickets above to locate the desired ticket
6. Click the checkbox to the left of the desired ticket number
7. Select the **Request Update** button
8. Modify the Email Body of the Status Update Request if desired
9. Click the **Submit Request** button
   Note: *(1) You will receive a confirmation that the status update request was successfully submitted with instructions to contact support if the request is urgent. (2) Support will send an email and provide a case number or follow-up with a phone call to update you on the status of the support request.*
10. Click the **Close** button

Resolve an Active Support Ticket

Follow these steps to resolve an open support ticket:

1. Launch web browser
2. Type https://support.captech.net
3. Login to the support portal using your user name and password
4. Click the **Support** button
5. Follow the steps to View Open Support Tickets above to locate the ticket to be resolved
6. Click the checkbox to the left of the desired ticket number to be resolved
7. Select the **Resolve** button
8. Modify the Email Body of the Mark Support Ticket as Resolved if desired
9. Click the **Mark as Resolved** button
10. Click the **Close** button

Product Downloads

The product downloads section allows users the ability to download product files using our custom-built file browser

- When the user clicks the Product Downloads button they will be shown tiles for all of the different products they have access to download files for
- Clicking a tile will show a file browser to allow users to download files

File Sharing

The file sharing section allows users the ability to download/upload files to a company account using our custom-built file browser safely and securely. You should only upload and download files when directed to by a support representative.

Notes: (1) Capstone Technology uses Azure Storage as their file sharing site. (2) Capstone Technology reserves the right to delete files on a regular basis. (3) Users will only be able to see files stored to their company account only.

Create a New Folder and Upload a File

Prior to uploading your first file, you will be required to create a folder to save the file. After the file folder has been created you will use this folder to store additional files.

1. Launch web browser
2. Type https://support.captech.net
3. Login to the support portal using your user name and password
4. Click the **File Sharing** button
5. Click the **New Folder** button
6. Type the new folder name
7. Click the **Choose Files** button
8. Navigate to where the file you wish to upload is located
9. Select the file and click the **Open** button
10. Click the **Upload** button
11. Click the **Upload Another File** button to upload any additional file(s). Repeat this step until all desired files are uploaded.
12. Click the **Finished** button if all files have been uploaded

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Upload a File

Follow these steps to upload a file when your client file folder has already been created:

1. Launch web browser
2. Type https://support.captech.net
3. Login to the support portal using your user name and password
4. Click the **File Sharing** button
5. Select the folder where the file will be stored
6. Click the **Upload** button
7. Click the **Choose Files** button
8. Navigate to where the file you wish to upload is located
9. Select the file and click the **Open** button
10. Click the **Upload** button
11. Click the **Upload Another File** button to upload any additional file(s). Repeat this step until all desired files are uploaded.
12. Click the **Finished** button if all files have been uploaded

Download a File

Follow these steps to download a file when directed to by a support representative:

1. Launch web browser
2. Type https://support.captech.net
3. Login to the support portal using your user name and password
4. Click the **File Sharing** button
5. Select the folder where the file is stored
   Note: The Support Department will direct you to the appropriate folder
6. Click the checkbox to the left of the file to be downloaded
   Note: Only one file can be downloaded at a time
7. Click the **Download** button
   Note: A pop-up screen will appear which allows you to Open, Save or Cancel
8. Click the down arrow to the right of the **Save** button and select **Save As** selection
9. Navigate to where you wish to store the file
10. Click the **Save** button
11. Click the **Close** button
12. Repeat Steps 4-11 to download all remaining files

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Delete a File

Follow these steps to PERMANENTLY delete an uploaded file:

1. Launch web browser
2. Type https://support.captech.net
3. Login to the support portal using your user name and password
4. Click the **File Sharing** button
5. Select the folder where the file is stored
6. Click the checkbox to the left of the file to be downloaded
7. Click the **Delete** button
8. Click the **OK** button
9. The file will be permanently deleted

Marketing Materials

The Marketing Materials section allows users the ability to download marketing materials using our custom-built file browser

Download Marketing Material

Follow these steps to download marketing materials

1. Launch web browser
2. Type https://support.captech.net
3. Login to the support portal using your user name and password
4. Click the **Marketing Materials** button
5. Click the checkbox to the left of the file to be downloaded

   Note: *Only one file can be downloaded at a time*
6. Click the **Download** button

   Note: *A pop-up screen will appear which allows you to Open, Save or Cancel*
7. Click the down arrow to the right of the **Save** button and select **Save As** selection
8. Navigate to where you wish to store the file
9. Click the **Save** button
10. Click the **Close** button
11. Repeat Steps 5-10 to download all remaining files

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Community Forum

The Community Forum dataPARC Community (dataparcsolutions.com) is the home of the dataPARC Knowledge Base, Manuals, Webinars, and Community Discussions.

Register Community Forum Account

Follow these steps to create an account for the Community Forum.
Note: The Community Forum requires a separate login from the Customer Portal

1. Launch web browser
2. Type https://support.captech.net
3. Login to the support portal using your user name and password
4. Click the **Community Forum** button
5. Click the **Register Now** button
6. Complete all the required fields of the Register Form
7. Click the **Register** button
8. Confirmation email will be sent to the specified email account within an hour
9. **dataPARC Community - Account confirmation required** email will be sent to the specified email account within an hour
10. Select the **Confirm your email** link
11. Once you have confirmed your email your account will require the approval of the dataPARC Community Administrator
12. A final confirmation email will be sent once your account when approved by the dataPARC Community Administrator

    Note: You will receive a response within one business day

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