# CGS Labs Partner portal Help

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# Getting started

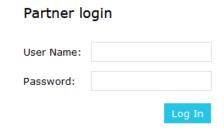
## Get your account

CGS Labs personnel create accounts for CGS Labs Partner portal. Please contact <a href="mailto:support@cgs-labs.com">support@cgs-labs.com</a>. They will create a user account for you, and all the necessary information will be send to you with an email.

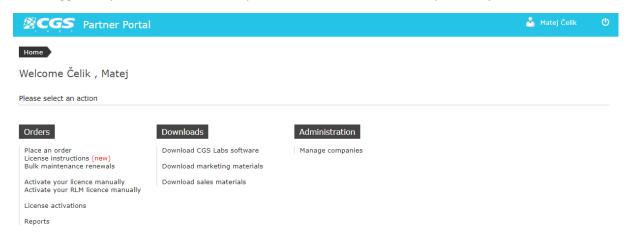
Your user roles will be defined based on communication with CGS Labs international sales manager.

# Sign in

CGS Labs Partner portal is accessible on this address: <a href="https://partners.cgs-labs.com/">https://partners.cgs-labs.com/</a> Use your username and password to log in.



Once logged in, you will see available options/functionalities, which depend on your user roles.



# My profile

User profile is accessible in the upper right corner, with a click on your name (next to logout icon).



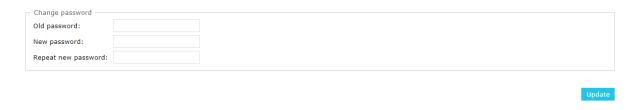
User can see his/her details and change name and password. Confirm the updated fields with *Update* button.



If you need to change user name and email, please send an email to <a href="mailto:support@cgs-labs.com">support@cgs-labs.com</a> or <a href="mailto:info@cgs-labs.com">info@cgs-labs.com</a>.

# Change your password

Under your profile, there is an option to change your password. First, enter your existing password, and then type new password twice. Please follow the password recommendations. Confirm the password change with *Update* button.



# Forgot your password

If you lost your password, please use "Lost password" connection on the sing in webpage <a href="https://partners.cgs-labs.com/">https://partners.cgs-labs.com/</a>. Enter your user name and press *Submit* button.



New password will be automatically created and sent to you in an email.

If you forgot your user name also, please contact support@cgs-labs.com or info@cgs-labs.com.

# Sign out

You can sign out with a logout icon in the upper right corner.



# Downloads

Under Download section, you can download different versions of CGS Labs SW portfolio, and marketing and sales material.



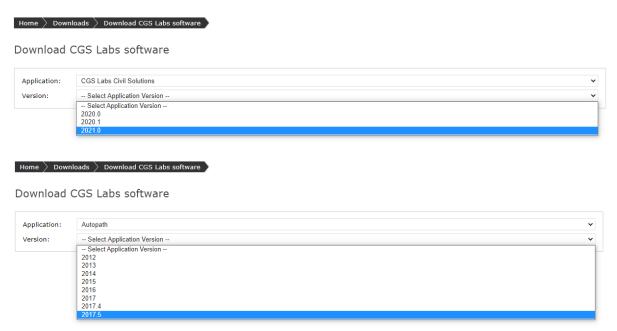
## Download CGS Labs SW

When you want to download installation files of CGS Labs SW solutions, please select option Download CGS Labs software. From first drop down menu, please select SW application, which you would like to download/install.

\* Please note that from version 2020.x all CGS Labs SW solutions (Plateia, Ferrovia, Aquaterra, Electra, Autopath, Autosign) have a common installation file (CGS Labs Civil Solutions).

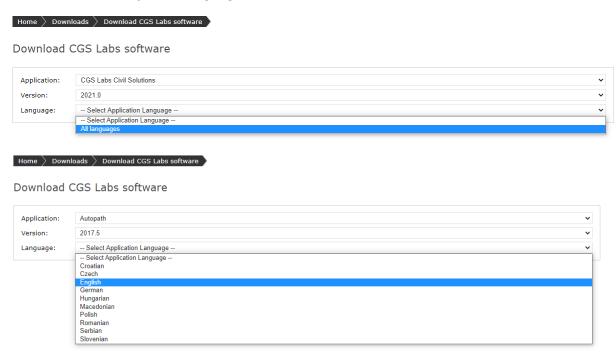


On the next step, please select the SW version you would like to download.



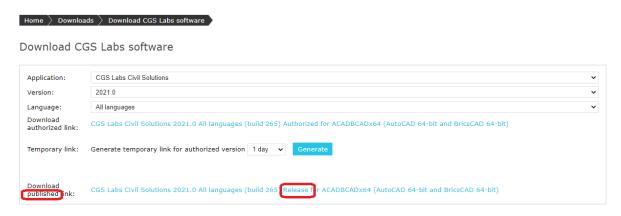
Third step is choosing the application language.

\* Please note that from version 2020.x all CGS Labs SW language versions are gathered under a common installation file (All languages).



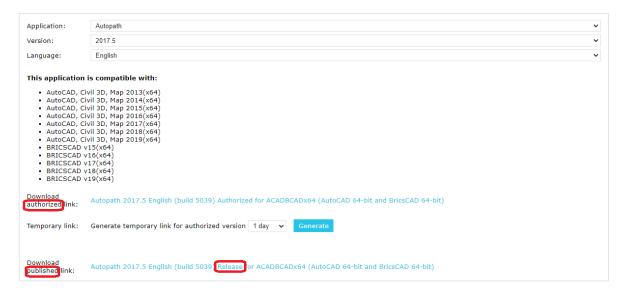
After that, you receive a list of compatible CAD SW for chosen application, and an option to download authorized version (for testing only) and published version (for end users). Temporary link is available for authorized versions only.

\*For end users, use release version only (published link)!





#### Download CGS Labs software



# Download marketing material

Under Download marketing material section, you can access marketing material.

Under folder How to use CGS Labs Partner portal there are video instructions for creating orders and reports.

Each CGS Labs products has its own folder, where marketing material for this product is stored.

Under Installation manuals, you can find manuals for installation and activation of different version of CGS Labs SW.

Online training courses folder holds video material for training purposes. \*Please note that most updated video material is now available on CGS Labs webpage.

Webinars folder holds some recent webinar material.

In What's new folder there is material with all the changes in latest CGS Labs SW versions. \*Please note that this document is available from CGS Labs SW ribbon also.



## Download sales material

Under Download sales material there is sales related material for CGS Labs solutions. \*Please note that sales material was not updated recently, please contact out international sales manager for further information.



# **Orders**

Orders are a basic functionality for ordering CGS Labs SW and creating licenses for them. Besides creating orders, there are other order related functionalities, like checking license activations and different order reports.

Orders are documents for CGS Labs and partners, not end users!

# Orders

Place an order License instructions (new) Bulk maintenance renewals

Activate your licence manually Activate your RLM licence manually

License activations

Reports

#### License instructions

Please read the license instructions, where all the details and rules about order (license) creation are defined. In this document, you will find answers, who can define different license types and when he can define them.

Document is also available on this link:

https://partners.cgs-labs.com/res/sales/Instructions for managing CGS Labs SW licenses.pdf

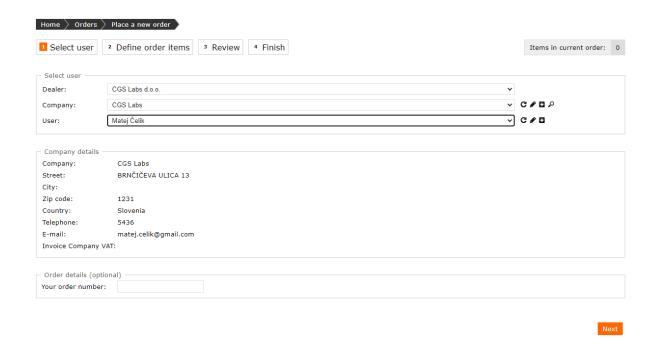
# Place an order

Creating an order is a basic functionality for ordering CGS Labs SW and creating licenses for them.

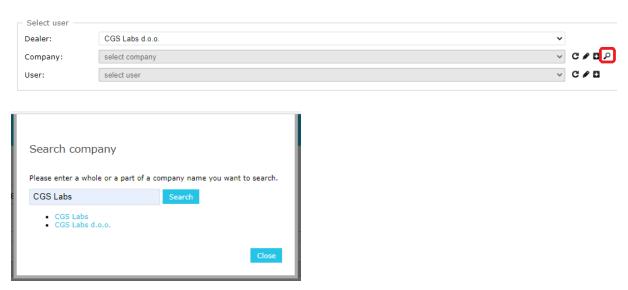
## 1. step: Define the company and user

To start creating a new order, select option *Place an order* under *Order* section. In the first step, select the company, for which you are creating order, and a contact person in this company.

On the bottom, you can add your order number (from your ordering system).



If you don't know if the company you are creating order for is already on the list (so you don't define it twice), you can select the search tool and check, whether you need to create the company or not.



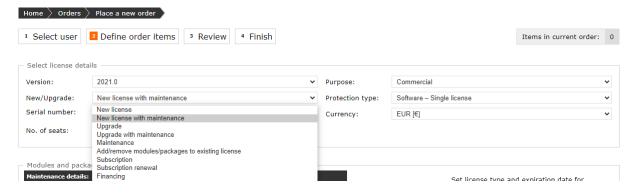
If you need to add or edit the company (or contact), select the tools for editing or adding a new company (or contact). Procedure is same as described under Admin/Managing companies (Add/Edit company).



# 2. step: Define order items, purpose, protection

First, define version for CGS Labs SW. If you are creating new license with no special client needs, define latest version (also predefined).

Second, select order type (New/Upgrade), which defines the type of order you would like to create.



#### Order types

- New license: Create a new license with a new serial number, without maintenance.
- New license with maintenance: Create a new license with a new serial number, with maintenance.
- Upgrade: Upgrade existing license (existing serial number) to a new version, without maintenance
- Upgrade with maintenance: Upgrade existing license (existing serial number) to a new version, with maintenance
- Maintenance: Add maintenance to existing license (existing serial number)
- Add/remove modules/packages to existing license
- Subscription: Create new subscription (new serial number)
- Subscription renewal: Renew existing subscription (existing serial number)
- Financing: create first order for financing of a new license (new serial number, with maintenance)

Serial number drop down menu is available only, when we make orders, which use existing license (serial number).

Number of seats is number of activations, which has to be 1 for a single license (if user would purchase 2 single licenses on same serial number, then this number would be 2).

Next, define order purpose.



#### Order purposes

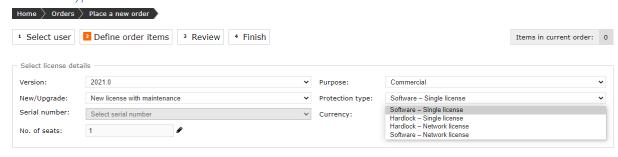
Please read license instructions, available under Orders section, to check which order types can be used in certain occasions.

- Trial: for potential user trial use
- Commercial: payable license, commercial use
- Educational: for universities and high schools (education or research purpose)
- Developer: for CGS Labs developers only

- Not for Resale: NFR, for CGS Labs and partners, agents; for testing, presentations, technical support
- Training: for classrooms where CGS Labs or partners is conducting user training.
- Home Use: Home use license for users, which are entitled to use home use license.
- Student: for students educational purposes

After that, select the license protection type.

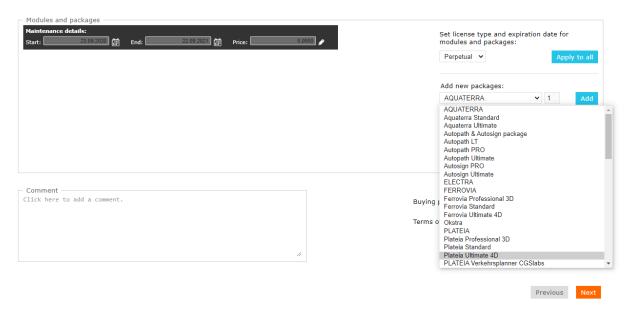
#### Protection type



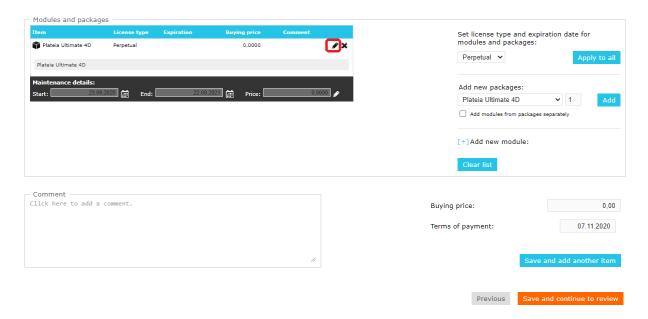
- Software Single license
- Hardlock Single license (for maintaining old licenses only)
- Hardlock Network license (for maintaining old licenses only)
- Software Network license

Hardlocks (USB dongles) can bu used for maintain old licenses only. We don't provide new hardlock licenses (new USB dongles) anymore.

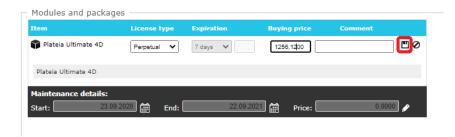
Now add a package (CGS Labs SW product) or more packages to this order. Select desired product, define whether license is *Perpetual* or *Time limited*, and click Add. You can add more products to this order.



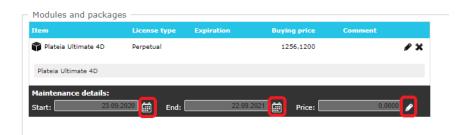
With editing the added product, you can add buying price and change license type (if needed). Please enter your buying price.



To save the editing, press save icon.



In the next step, the maintenance details have to be edited. Edit start and end date of maintenance, and enter the buying price for maintenance. Please enter your buying price.



Price editing has to be saved with save icon.



At the end of 2.step you can add a comment about this order. If you would like to create another license on same order, the you can create new order item with *Save and add another item* (check this

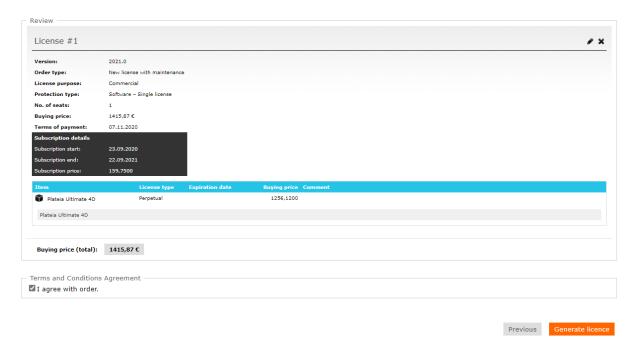
document section *Combine more orders*). If you would like to finish with this order, select *Save and continue to review*.



# 3.step: Review

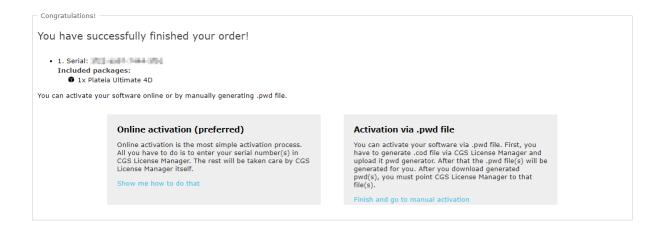
Please review the order you created in previous step. If you need to edit it, you can click the edit icon on the upper right corner, or click *Previous* button at the bottom.

If you don't need to change the order, tick that you agree with order, and click Generate license.



# 4.step: Finish

You can see the serial number for the license created, and packages included on this license. Click finish to *Finish* with this order.



Finish

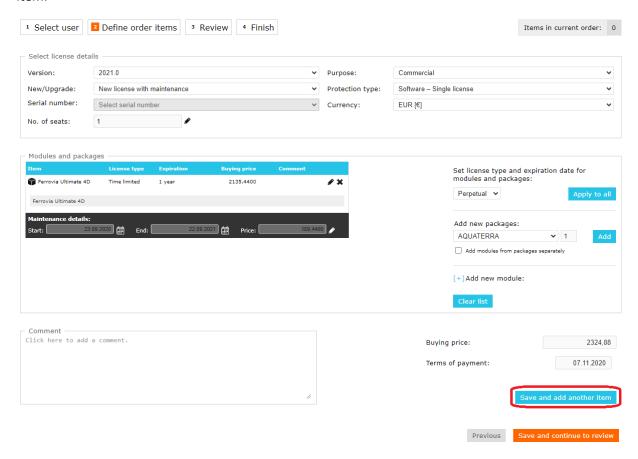
You have also received an order on your email address.



#### Combine more orders

If you would like to order 2 or more licenses on 1 order, you can combine order from more order items. Each order item defines 1 license (serial number).

Once you have finished defining first order item (license) on 2.step, select Save and add another item.



When defining second order item (same steps as first one), you can see on the upper right corner, that you already have 1 order item saved.



Once you finish second order item, you can *Save and continue to review*. Under step 3 you can review both order items/licenses, edit them if needed or proceed to finish.

# Editing an order

Once order is finished, you can't edit it anymore. For editing please contact CGS Labs support at <a href="mailto:support@cgs-labs.com">support@cgs-labs.com</a>, who will make the order changes.

## Different order creating scenarios – video recordings

Create subscription: <a href="https://youtu.be/QFJTB0sQdfc">https://youtu.be/QFJTB0sQdfc</a>

Create trial license: <a href="https://youtu.be/x25NzRTtgHY">https://youtu.be/x25NzRTtgHY</a>

Change subscription to permanent: <a href="https://youtu.be/sBAr19RuHT4">https://youtu.be/sBAr19RuHT4</a>

Prolong subscription: <a href="https://youtu.be/7j2slH4foDU">https://youtu.be/7j2slH4foDU</a>

Create HomeUse license: https://youtu.be/Mjr8xtKidNQ

## Activating the right CGS Labs SW version

Please mind that with version 202x we changed our licensing system. So for orders (licenses) for versions 2017.x or older, which have active maintenance, you need to create an upgrade (with maintenance) order to latest version, so user will be able to activate latest CGS Labs SW version (202x).

**Example**: We have a 2017.5 license with maintenance. License is <u>permanent</u>. This is the last order for this license.

Serial number

Version 2017.5

Order type New license with maintenance

Licence purpose Development

Protection type Software – Single license

 No. of seats
 1

 Buying price
 0.00

 Terms of payment
 09.12.2019

Maintenance details
Maintenance start: 25.10.2019
Maintenance end: 24.10.2020
Maintenance price: 0.00

Comment:

#### Ordered items

Item name	Licence type	Exp. date	Buying price
1. [P] Plateia Ultimate 4D	Perpetual	N/A	0.00 EUR
Plateia Ultimate 4D			

Because maintenance is still valid, this license is entitled to upgrade to 202x version. Customer can install 202x version (please check CGS Labs 202x Installation&Licensing Manual). Before they can activate the same serial number (from his license), you have to create new order for 202x version.

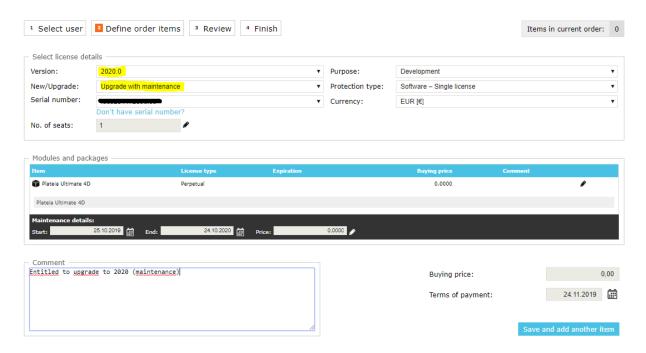
Create new order for this customer, based on same serial number.

• Version: 2020.0

New/Upgrade: Upgrade with maintenance

• Serial number: the same serial number for this license

• Comment: write a comment to explain why customer is entitled to upgrade to 2020



You get an order for 2020 version and client can activate this serial number on 2020 SW version.

Serial number Version 2020.0 Order type Upgrade with maintenance Licence purpose Development Protection type Software - Single license No. of seats **Buying price** 0.00 24.11.2019 Terms of payment Maintenance details 25.10.2019 Maintenance start: Maintenance end: 24.10.2020 Maintenance price: 0.00

Comment:

#### Ordered items

Item name	Licence type	Exp. date	Buying price
1. [P] Plateia Ultimate 4D	Perpetual	N/A	0.00 EUR
Plateia Ultimate 4D			

# Activate your license manually

This functionality is for users of version 2017.5 or older, which don't have an option to activate their license online. Here you can create pwd file (based on users cod file), which activates license on client computer.

Instructions are available on this site.

# Activate your RLM license manually

This functionality is for users of version 2020.0 or newer, which don't have an option to activate their license online. This sub site is accessible without signing in, so user can activate his license himself (from another computer, which has internet access).

Instructions for manual activation are accessible in the licensing manual:

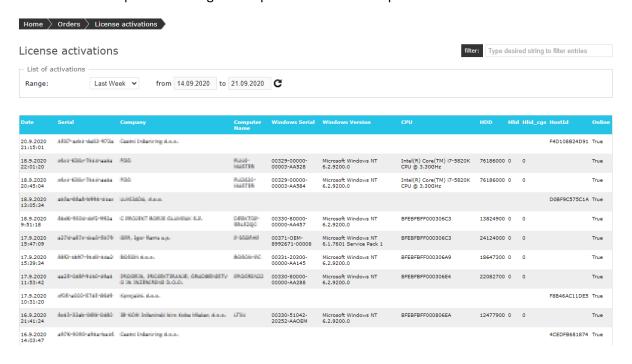
# https://partners.cgs-

<u>labs.com/res/marketing/Installation%20manuals/CGSLabs Civil Solutions 202X Installation and Licensing Manual ENG.pdf</u>

#### License activations

Under license activations you can see licenses of your customers that were activated in the time period, which you define. You can also use filter tool to help you search if the list is larger.

Please mind that queries for longer time period can take a couple of minutes to execute.



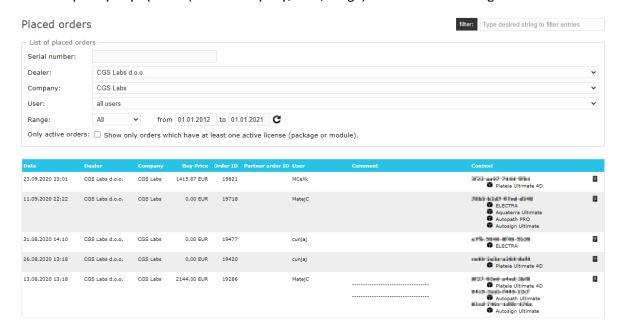
# Reports

Reports tools helps you to gather requested information from existing orders.



# View placed orders

Use this report query options (define company, user, range) to search for existing orders.



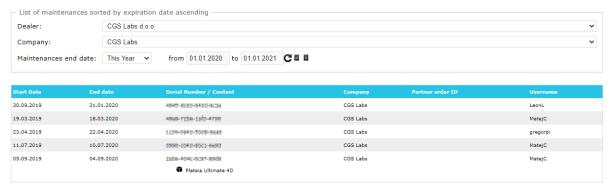
To open and check the order details click on the icon at the end of order/license row.



# Maintenance expiration reports

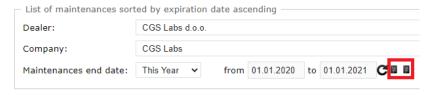
This reporting tool helps you to gather your clients' maintenance expiration dates.

#### Maintenances expiration reports



You can export the list to html or xls file.

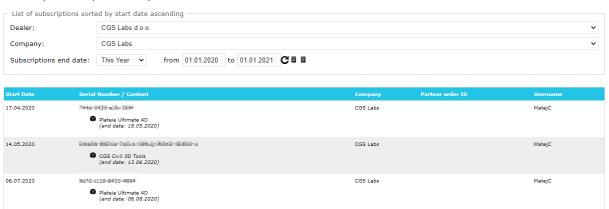
## Maintenances expiration reports



# Subscription expiration reports

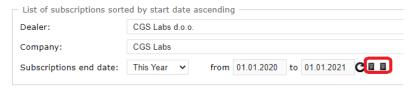
This reporting tool helps you to gather your clients' subscription expiration dates.

#### Subscriptions expiration reports



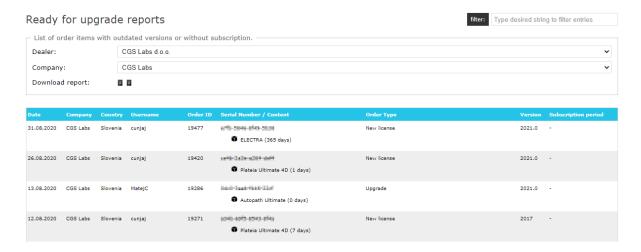
You can export the list to html or xls file.

# Subscriptions expiration reports



# Licenses which are ready for upgrade

This reporting tool helps you to gather information, which licenses have outdated versions are without active maintenance.



You can export the list to html or xls file.

# Ready for upgrade reports



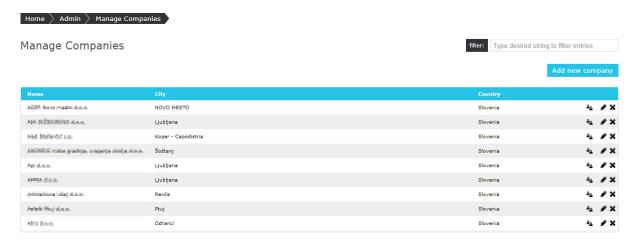
# Administration

## Manage companies

If you have a role of orders editor, you have an option to manage your companies (companies, which are related to your company) and contacts.

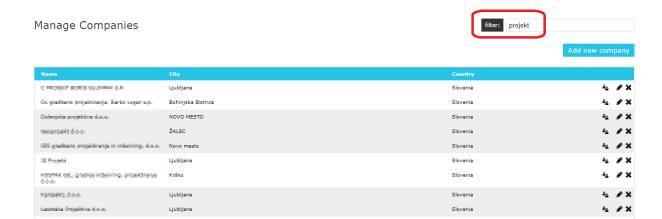


By choosing Manage companies options you get a list of all companies, that are related to your company (your company is their owner company).



# Filter companies

You can search/filter for companies, using the filter tool in the upper right corner. This tool will filter all companies, which name includes the written text.



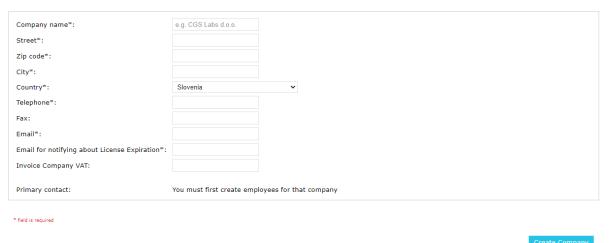
## Add new company

If a company is not defined yet, you can add it to the list of your companies. *Select Add new company* command on the upper right corner.



On this new subpage, please enter the information about the company you would like to add. Please enter as many information as possible, best all. All the fields marked with \* are mandatory. Submit the creating with *Create Company button*.

## Create/Edit Company



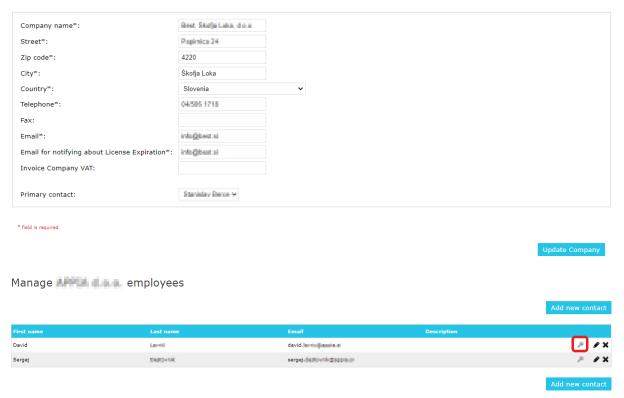
# Edit company details

To edit existing company details select the edit icon next to the company you would like to edit.



This opens same interface as for creating new company, only with existing information about the company. All the fields marked with \* are mandatory. Edit the desired fields and confirm the changes with *Update Company*.

#### Create/Edit Company



# Delete company

If you would like to delete the company, select the delete icon for the desired company. \*Please mind that company can't be deleted once it has customers defined (you have to delete customers first) or once it has at least one order created.



# Manage contacts

To manage customer information, select the customer icon for the desired company.



# Add customer

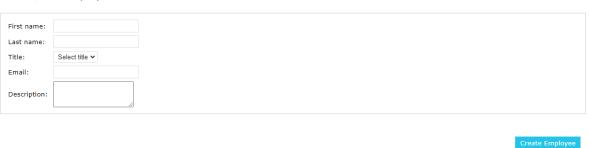
If you would like to add new contact for this company, select *Add new contact*.

Manage - employees



Enter the information about the contact and click *Create Employee*. First name, last name, title and email are mandatory fields.





#### Edit customer information

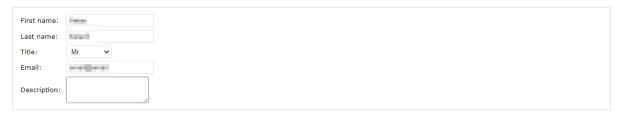
To edit existing contact details select the edit icon next to the contact you would like to edit.

Manage male employees



This opens same interface as for creating new contact, only with existing information about the contact. First name, last name, title and email are mandatory fields. Edit the desired fields and confirm the changes with *Update Employee*.

#### Create/Edit Employee



Update Employee

# Set customer as primary contact

If you would like one contact to be the primary contact for a company, (it is preselected when creating new order for this company), select the key icon next to this contact.

Manage - employees



# Delete customer

If you would like to delete the contact, select the delete icon for the desired contact. \*Please mind that contact can't be deleted once it has at least one order created.

Manage - employees

