

# That CAD Girl

## Frequently Asked Questions

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### [FAQ400] Find Answers on your new That CAD Girl Portal

### Find Answers on your new That CAD Girl Portal

If you (or your company) have ever requested a proposal or invoice from That CAD Girl – Congrats! You have a portal!

Every portal is specific for the email address we have on file for you, so – **Click here to access That CAD Girl's Customer Portal** then enter your email address.

The availability of tabs on your portal will depend on whether you have been granted Full Access by the primary contact in your company or if you have Restricted Access. Everyone will have Home, Free Webinars and My Training tabs while those with Full Access will have access to Recent Transactions, Serial Numbers and Maintenance Reports.



JD

Jennifer DiBona

Company Name: TCG Portal Demo

Customer since: Apr-09-2021

Contact Type: Main Point Of Contact

Email: jennifer@thatcadgirl.com

Phone:

Mobile:

If you have professional license numbers you would like to have displayed on any training certificates, please enter them here. They will be shown on the certificate EXACTLY as you enter them.

NC 000000, KY 0000

Your info

## Company Information

Company Name

TCG Portal Demo

Company Phone

919-417-8351

Website

www.thatcadgirl.com

Carlson Cust ID

Webinar eligibility may not reflect recent purchases. If you believe it's incorrect, please send an email to [contactus@thatcadgirl.com](mailto:contactus@thatcadgirl.com)

Most Recent Purchase for Webinar Eligibility

Aug-08-2023

Eligible for Webinars through

Aug-28-2024

Your eligibility for Free Webinars

## Main Point of Contact

Name: Jennifer DiBona

Phone:

Email: jennifer@thatcadgirl.com

If you can't access what you need on the portal, ask this person to notify us that you need unrestricted access

## Billing

TCG Portal Demo

Jennifer DiBona

bCity1, bState1 bZip1

## Shipping

TCG Portal Demo

Jennifer DiBona

sCity1, sState1 sZip1

## Company Contacts

Name / Title	Contact Type	Phone & Email	Restricted Access	Opted Out Of Marketing
Jennifer DiBona	Main Contact	jennifer@thatcadgirl.com	False	True
Claire DiBlasi	Additional Contact	claire@thatcadgirl.com	False	False
H Rowsey	Additional Contact	support@thatcadgirl.com	True	False
Jen Thompson	Additional Contact	contactus@thatcadgirl.com	False	False
T Maxwell	Additional Contact	training@thatcadgirl.com	True	False
TEST1	Additional Contact		True	False
TEST12	Additional Contact		True	False

Your company's active contacts in our system

Send us a message

Send

## Submit Updates or Changes Here

If there are any changes, please describe the desired changes in the box below. Any requested changes will be confirmed with the Main Point of Contact for your company before applying the requested changes.

Please enter any information changes here...

If your information looks correct, please check "Everything is correct" below.

☐ Everything Is Correct, No Changes☒ Check Here to Opt Out Of Marketing Emails

Submit

Validate your company information or request changes here

JTNDYSUyMG5hbWU1M0Q1MjJyZWNLbnR0cmFuc2FjdGlvbnN0YWIlMjIlMjBpZCUzRCUyMnJlY2VudHRyYW5zYWN0aW9uc3RhYiUyMiUzRSUyMCUzQyUyRmElM0U=Rece

**nt Transactions** – On this tab, you can review proposals and securely pay your invoice using any major credit card or directly from your bank account. You can also review and download PDF copies of past proposals, invoices and payment transactions. This tab is only available to users with Administrative Access.

That CAD Girl

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Maintenance Reports

Free Webinars

My Training

JD

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\$

Recent Transactions

TCG Portal Demo

0.00

Current Balance

All Transactions

Search

Advanced

<input type="checkbox"/>	Date	Transaction	Ref #	Amount	Balance
<input type="checkbox"/>	Jul-15-2023	Invoice	11832M	49.00	0.00
<input type="checkbox"/>	Mar-31-2023	Estimate	P-9149M	1,542.90	0.00
<input type="checkbox"/>	Mar-31-2023	Estimate	P-9151M	10.00	0.00
<input type="checkbox"/>	Nov-10-2022	Estimate	P-8750M	1,981.24	0.00
<input type="checkbox"/>	Sep-13-2022	Estimate	P-8596M	1.07	0.00
<input type="checkbox"/>	Sep-13-2022	Estimate	P-8599M	1.07	0.00
<input type="checkbox"/>	Sep-13-2022	Estimate	P-8602M	2.15	0.00
<input type="checkbox"/>	Sep-06-2022	Estimate	P-8620M	4.00	0.00
<input type="checkbox"/>	Sep-05-2022	Estimate	P-8619M	3.00	0.00
<input type="checkbox"/>	Jul-21-2022	Estimate	P-8458M	200.00	0.00

1

2

3

>

1 - 10 of 22 records.

Send us a message

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**Clicking on an Estimate** – When viewing an Estimate (Proposal) in Recent Transactions, you have different options depending on whether the Estimate has been previously converted to an invoice, is active (unexpired) or is past due (expired).

For active (unexpired) and unconverted Estimates, you can click “Accept & Pay” to convert the Estimate to an Invoice and proceed directly to our payments screen or click “Create Invoice” to convert the Estimate to an invoice and proceed to the Invoice screen.


For past due (expired) or previously converted Estimates, you only have the “Print” button that allows you to export to a PDF.

NOTE: Once an Estimate has been converted to an Invoice using either option, you must return to the Recent Transactions table and open the Invoice to pay.

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 **Estimate:P-9149M** **1,542.90**  
Total

TCG Portal Demo

<b>Billing</b> TCG Portal Demo Jennifer DiBona bCity1, bState1 bZip1	<b>Shipping</b> TCG Portal Demo Jennifer DiBona sCity1, sState1 sZip1	<b>Date</b> Mar-31-2023 <b>Due</b> Mar-31-2024
---	--	---

Item	Description	QTY	Amount	Tax
2014EOY_SurveyOEM:6020.100.795 Robot Surveyor Acc	Carlson Robot Accessory Kit Surveyor Cradle Includes: 1 GRZ4, 360 reflector 1 8 Ft Aluminum Telescopic Rod with Leica tip (SECO) 1 Pole Clamp for 6100.610 with Compass 1 Cradle Surveyor/Surveyor+/Allegro	1	1,542.90	Non
Discounts	Discount	1	0.00	Non

1 - 2 of 2 records.

**Customer Message**  
customer messgae

Subtotal	1,542.90
Taxes	0.00
<b>Total</b>	<b>1,542.90</b>

[Create Invoice](#) [Accept & Pay](#) [Print](#)

Unexpired Estimates can be turned into an invoice, can be “Accepted & Paid” or printed from here.

Note: Once you have clicked on “Create Invoice” or “Accept & Pay”, this estimate will convert to an Invoice and these buttons will no long be available on this Estimate

Have a question? Contact Us!  
[ContactUs@ThatCADGirl.com](mailto:ContactUs@ThatCADGirl.com)

**Clicking on an Invoice** – When viewing an Invoice in Recent Transactions, you have different options depending on whether the Invoice is active or past due.

For active (unexpired) Invoices, you can click “Pay Now” to proceed to our payment screen.

For past due (expired) Invoices, you only have the “Print”

button that allows you to export to a PDF.

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Invoice:11993M

TCG Portal Demo

Print

395.00

Balance Due

Billing Address

TCG Portal Demo

Jennifer DiBona

bCity1, bState1 bZip1

Shipping Address

TCG Portal Demo

Jennifer DiBona

sCity1, sState1 sZip1

Date

Sep-27-2023

Due

Sep-30-2023

Date	Item	Description	QTY	Rate	Amount	Tax
Sep-27-2023	Carlson (Current):Maintenance 2023:Civil Suite Maint	Civil Suite Maintenance Renewal	1.00	395.00	395.00	Non

1 - 1 of 1 records.

Subtotal

395.00

Taxes

0.00

Total

395.00

Payments / Credits

0.00

Balance Due

395.00

For unpaid and active invoices, you can "Pay Now" or "Print" from this screen

Pay Now

Print

Have a question? Contact Us!

ContactUs@ThatCADGirl.com

JTNDYSUyMG5hbWUIM0QlMjJzZXJpYWxudWliZXJzdGFiJTtiyJTIwaWQlM0QlMjJzZXJpYWxudWliZXJzdGFiJTtiyJTNFJTtiwJTNDJTJGYSUzRQ==**Serial Numbers** – On this tab, you can see a list of your company’s Active Carlson Software Serial Numbers. The table on this screen is searchable and can be filtered or downloaded in Excel format. This tab is only available to users with Administrative Access.

**DISCLAIMER:** That CAD Girl has made every attempt to ensure the accuracy and reliability of the information about your Carlson Software licensing that is provided on this website. Nevertheless, inadvertent errors may occur so all information shall be confirmed and validated directly by Carlson Software prior to use.

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## Active Serial Numbers

TCG Portal Demo

Click on any **ACTIVE** serial number to see details

Click the download button to send yourself a CSV file of this serial number table

Search for a serial number. Note: the 3rd set of digits for a Carlson serial number is unique and can be used for a quick search here

Serial Number (Active)	Product + Version	Config	Upgraded From (Inactive)	Maintenance Expires	Customer Notes
12058625-SurvNET-xxxxSN	SurvNet (R14)	test 12/22			test
12058625-58B1140-xxxxSN-6934	Survey (2022)		11403265-58B1140-xxxxUPG-1082466	Aug-29-2023	
XXXX-XXXX-SURVEY-XXXX	Survey (2021)			Jan-25-2021	THESE ARE CUSTOMER NOTES ABOUT XXXX-XXXX-SURVEY-XXXX
XXXX-XXXX-CIVIL SUITE-XXXX	Civil Suite (2022)	Survey, Civil, Hydrology, GIS	XXXX-XXXX-CIVIL SUITE-UPGRADE-XXXX	Sep-01-2022	THESE ARE CUSTOMER NOTES
000123456 SN	Networked Carlson Software (2022)	Surveyx2,Civilx3,Hydrox2,GISx2	98765432100 upg	Dec-31-2022	these are our customer notes
Testing123	Civil Suite Network (2020)			Feb-04-2022	
TEST4321	Civil Network (2021)				
TEST1234 SN	Survey OEM (2021)		TEST 1234 UPG		these are our customer notes about TEST 1234

1 - 8 of 8 records.

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[ContactUs@ThatCADGirl.com](mailto:ContactUs@ThatCADGirl.com)

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**Serial Number\***  
XXXX-XXXX-CIVIL SUITE-XXXX

**Product Name\***  
Civil Suite

**Product Version\***  
2022

**Config**  
Survey, Civil, Hydrology, GIS

**Upgraded From**  
XXXX-XXXX-CIVIL SUITE-UPGRADE-XXXX

**Maintenance Expires**  
Sep-01-2022

**Customer Notes**  
THESE ARE CUSTOMER NOTES

**Download Link**  
[https://web.carlsonsw.com/files/updates/updates05.php?ss\\_email=&product=Carlson&ss\\_email=&version=2022](https://web.carlsonsw.com/files/updates/updates05.php?ss_email=&product=Carlson&ss_email=&version=2022)

**Link to Install Instructions**  
<https://thatcadgirl.com/faq/downloading-installing-registering-your-carlson-software/>

[Save](#) [Email SN Details](#)

Have a question? Contact Us!

[ContactUs@ThatCADGirl.com](mailto:ContactUs@ThatCADGirl.com)

JTNDYSUyMG5hbWU1M0Q1MjJtYWludGVuYW5jZXJlcG9ydHN0YWIlMjIlMjBpZCUzRCUyMm1haW50ZW5hbmNlcmVwb3J0c3RhYiUyMiUzRSUyMCUzQyUyRmElM0U=**Maintenance Reports** – On this tab you can see the most recent copies of Carlson Maintenance Reports. You can download a PDF version of any report by clicking the “Open Attachment” button in the row. This tab is only available to users with Administrative Access.

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**Documents**  
TCG Portal Demo

**Report Date** **Next Maintenance Expiration Date**

Search

Generated Date	Expiration Date	Document Type	
Jul-01-2022	Tue, Aug 29, 2023	Maintenance Report	<a href="#">Open Attachment</a>
Sep-20-2021	Tue, Aug 29, 2023	Maintenance Report	<a href="#">Open Attachment</a>
Jun-10-2021	Sun, Aug 29, 2021	Maintenance Report	<a href="#">Open Attachment</a>
Jul-31-2019	Sat, Aug 29, 2020	Maintenance Report	<a href="#">Open Attachment</a>
Aug-31-2018	Thu, Aug 29, 2019	Maintenance Report	<a href="#">Open Attachment</a>

5 records

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JTNDYSUyMG5hbWUIM0QlMjJ3ZWJpbmFyc3RhYiUyMiUyMGlkJTNEJTIyd2ViaW5hcnN0YWIlMjIlM0UIMjAlM0MlMkZhJTNF**Free Webinars** – This tab is accessible to all users although the information will vary depending on your Company's webinar eligibility (see Home tab). The information on this screen is broken down into 3 tables:

- A list of Upcoming sessions in our Webinar Series with links to pre-register
- A list of webinars that you attended and a button to download a Certificate of Attendance. Note: You can add your professional license numbers on your Home tab and they will appear on your certificates.
- A list of recordings of webinars that you attended

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## Links to Upcoming Webinars ▾

If you do not see any webinars, you may not be eligible. Please check your Portal Home Page to see Eligibility.

Webinar Date	Webinar Name / Link	
Oct-27-2023	<b>Working With Sheet Sets with Travis Maxwell</b> <a href="https://attendee.gotowebinar.com/register/2684298643763949147">https://attendee.gotowebinar.com/register/2684298643763949147</a>	<a href="#">Click to Register or Join in Progress</a>
Oct-25-2023	<b>Stormwater Channel Design in Carlson Software with Travis Maxwell</b> <a href="https://attendee.gotowebinar.com/register/1298711682626467161">https://attendee.gotowebinar.com/register/1298711682626467161</a>	<a href="#">Click to Register or Join in Progress</a>
Oct-18-2023	<b>Site Project Grading</b> <a href="https://attendee.gotowebinar.com/register/7477439265145641557">https://attendee.gotowebinar.com/register/7477439265145641557</a>	<a href="#">Click to Register or Join in Progress</a>
Oct-12-2023	<b>Tips &amp; Tricks in Carlson Software with Travis Maxwell</b> <a href="https://attendee.gotowebinar.com/register/454412096819171932">https://attendee.gotowebinar.com/register/454412096819171932</a>	<a href="#">Click to Register or Join in Progress</a>
Oct-10-2023	<b>Introduction to Carlson Software: Settings, Setup, Configuration &amp; Points</b> <a href="https://attendee.gotowebinar.com/register/8048995094660379477">https://attendee.gotowebinar.com/register/8048995094660379477</a>	<a href="#">Click to Register or Join in Progress</a>

5 records

## Webinars Certificates ▾

Certificates for Webinars you have attended.

Webinar Date	Webinar Name	Time in Session (HH:MM)	
Sep-08-2022	All About Coordinates in Carlson Software	01:01	<a href="#">Print Certificate</a>

1 record

## Recordings and Documents for Webinars you have Attended ▾

Recordings of our Webinar Series sessions are available for review to anyone who attends a portion or all of the live presentation

Webinar Date	Webinar Name / Link	Available Until
No Results Found		

0 records

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Can't find the Webinar you need? Request webinar below.

[Send Request](#)

Have a question? Contact Us!

[ContactUs@ThatCADGirl.com](mailto:ContactUs@ThatCADGirl.com)

JTNDYSUyMG5hbWU1M0Q1MjJwYW1kdHJhaW5pbmd0YWIlMjIlMjBpZCUzRCUyMnBh  
aWR0cmFpbmluZ3RhYiUyMiUzRSUyMCUzQyUyRmElM0U=**Your Training** – This  
tab is accessible to all users although the information will  
vary depending on whether you or your Company have paid for

specialized training. The information on this screen is broken down into 3 tables:

- A list of Upcoming Training sessions that have already been paid for with links to pre-register
- A list of Past Training sessions the user has paid for and attended with a link to download a Certificate of Attendance
- A list of Past Training sessions with links to the recording

That CAD Girl

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Links to Upcoming Training

Click to expand

Date of Session	Training / Session	Link
No Results Found		

0 records

Your Training Certificates

Training Date	Training Name	Time In Session (HH:MM)	Certificate
No Results Found			

0 records

Recordings of Past Trainings

For custom or virtual classroom training that you have paid for, recordings will be available for review

Date of Session	Training / Session	Link
No Results Found		

0 records

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Can't find the Training you need? Request custom Training below.

Send Request

Have a question? Contact Us!

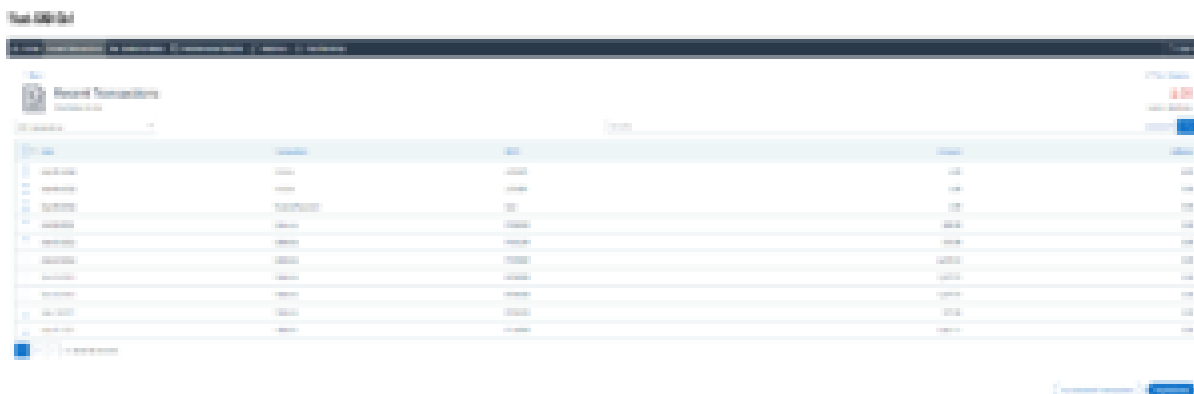
# Find Answers on your new That CAD Girl Portal

If you have ever requested a proposal or invoice from That CAD Girl – Congrats! You have a portal!

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**Recent Transactions** – On this tab, you can review proposals and securely pay your invoice using any major credit card or directly from your bank account. You can also review and download PDF copies of past proposals, invoices and payment transactions. This tab is only available to users with Administrative Access.



Date	Description	Amount	Status
10/10/2020	Proposal for 1000 units	\$1,000.00	Pending
10/10/2020	Invoice for 1000 units	\$1,000.00	Paid
10/10/2020	Payment for 1000 units	\$1,000.00	Completed
10/10/2020	Proposal for 2000 units	\$2,000.00	Pending
10/10/2020	Invoice for 2000 units	\$2,000.00	Paid
10/10/2020	Payment for 2000 units	\$2,000.00	Completed
10/10/2020	Proposal for 3000 units	\$3,000.00	Pending
10/10/2020	Invoice for 3000 units	\$3,000.00	Paid
10/10/2020	Payment for 3000 units	\$3,000.00	Completed
10/10/2020	Proposal for 4000 units	\$4,000.00	Pending
10/10/2020	Invoice for 4000 units	\$4,000.00	Paid
10/10/2020	Payment for 4000 units	\$4,000.00	Completed
10/10/2020	Proposal for 5000 units	\$5,000.00	Pending
10/10/2020	Invoice for 5000 units	\$5,000.00	Paid
10/10/2020	Payment for 5000 units	\$5,000.00	Completed

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[illegible]

Also, clicking on any serial number in the list brings you to a details page where you can add any “User Notes” that are helpful to you such as the user name, location or even the Change Key associated to that installation. You can also find the link to download and link to installation instructions.

## That CAD Girl

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Serial Number\*

12008125-1001140-wood29-0014

Product Name\*

Survey

Product Version\*

2022

Config

Upgraded From

11401245-1001140-wood1PG-1001405

Maintenance Expires

Aug 29 2023

Customer Notes

Download Link

<https://web.carlson.com/files/updates/updater05.php?email=&product=Carlson&email=&version=2022>

Link to Install Instructions

<https://thatcaddgirl.com/files/downloading-installing-registering-your-carlson-software/>

Save

**Maintenance Reports** – On this tab you can see the most recent copies of Carlson Maintenance Reports. You can download a PDF version of any report by clicking the box next to the report and then clicking the “Open Attachment” button at the bottom. This tab is only available to users with Administrative Access.

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Upcoming	Past	Attended
1.1 Introduction to the Carlson Software	1.1 Introduction to the Carlson Software	1.1 Introduction to the Carlson Software
1.2 Introduction to the Carlson Software	1.2 Introduction to the Carlson Software	1.2 Introduction to the Carlson Software
1.3 Introduction to the Carlson Software	1.3 Introduction to the Carlson Software	1.3 Introduction to the Carlson Software
1.4 Introduction to the Carlson Software	1.4 Introduction to the Carlson Software	1.4 Introduction to the Carlson Software
1.5 Introduction to the Carlson Software	1.5 Introduction to the Carlson Software	1.5 Introduction to the Carlson Software

**Webinars** – This tab is accessible to all users although the information will vary depending on your Company’s webinar eligibility (see Home tab). The information on this screen is broken down into 3 tables:

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- A list of Past sessions in our Webinar Series with links to the recording
- A list of sessions the user has attended with a link to download a Certificate of Attendance



**Paid Training** – This tab is accessible to all users although the information will vary depending on whether you or your Company have paid for specialized training. The information on this screen is broken down into 3 tables:

- A list of Paid Training sessions the user has attended with a link to download a Certificate of Attendance
- A list of Upcoming Paid Training sessions that have already been paid for with links to pre-register
- A list of Past Paid Training sessions with links to the recording



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