

That CAD Girl

Frequently Asked Questions

[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@thatacadgirl.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.
 This Field Will Auto Save When You Click Away

Company Information
 Company Name: TCG Portal Demo
 Company Phone: 919-417-8351
 Website: www.thatacadgirl.com
 Carlson Cust ID:
Main Point of Contact
 Name: Jennifer DiBona
 Phone:
 Email: jennifer@thatacadgirl.com

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@thatacadgirl.com	False	True
Claire Dilliesi	Additional Contact	claire@thatacadgirl.com	False	False
H Rowsey	Additional Contact	support@thatacadgirl.com	True	False
Jon Thompson	Additional Contact	contactus@thatacadgirl.com	False	False

CLICK FOR VIDEO

JTNDYSUyMG5hbWULM0QlMjJob21ldGFiJTIyJTIwaWQlM0QlMjJob21ldGFiJTIyJTNFJTIwJTNDJTJGYSUzRQ== **Home** – On this tab you can review the contact information about your company and also request updates to contacts or other out-of-date information. This screen also shows whether staff from your Company is eligible to attend our Monthly Webinar Series for Free.



Jennifer DiBona

Company Name: TCG Portal Demo
Customer since: Apr-09-2021
Contact Type: Main Point Of Contact

Email: jennifer@thatcadgirl.com
Phone:
Mobile:

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NC 0000000, 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
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

Validate your company information or request changes here

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.

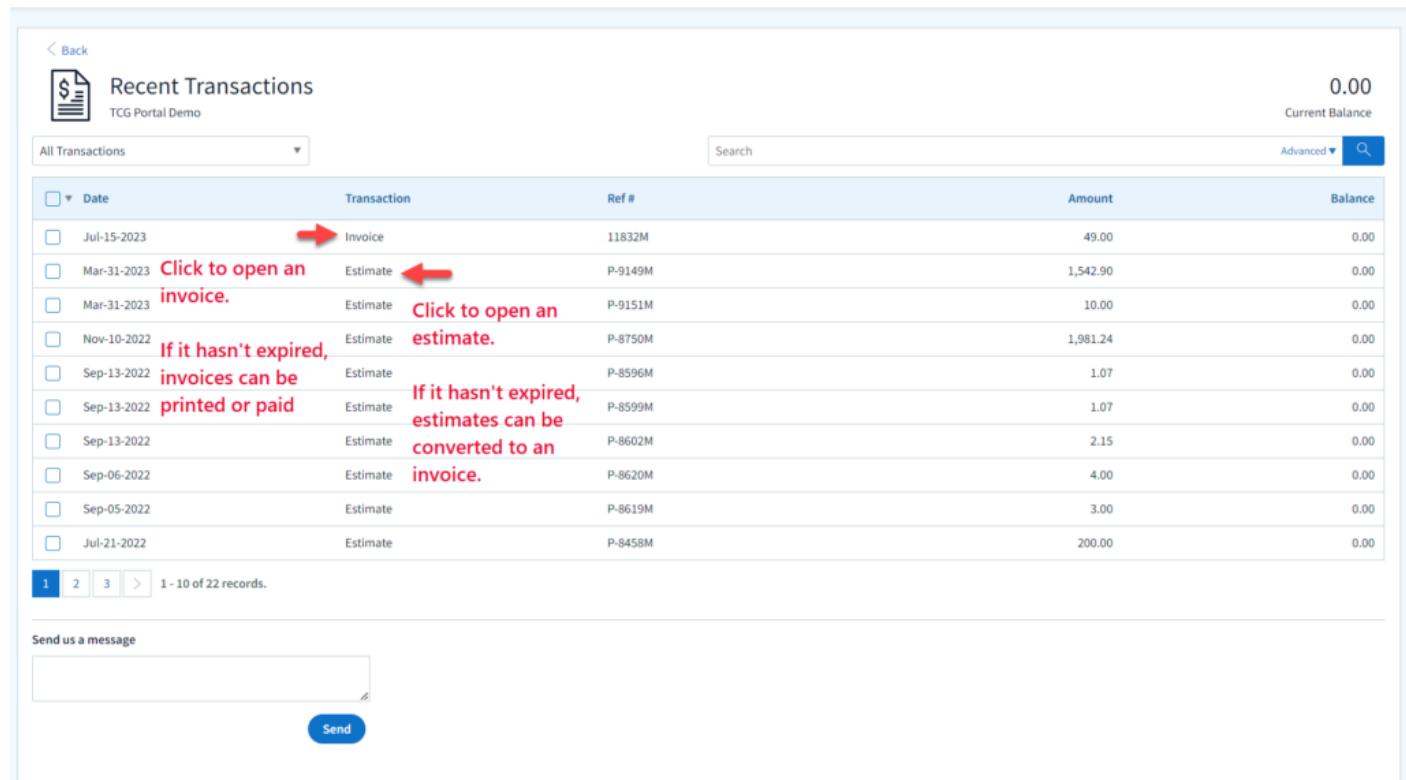
Everything Is Correct, No Changes
 Check Here to Opt Out Of Marketing Emails

Submit

JTNDYSUyMG5hbWUlM0QlMjJyZWNlbnR0cmFuc2FjdGlvbnN0YWIlMjIlMjBpZCUzRCUyMnJlY2VudHRyYW5zYWN0aW9uc3RhYiUyMiUzRSUyMCUzQyUyRmElM0U=Rece

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.

That CAD Girl



Recent Transactions

TCG Portal Demo

0.00
Current Balance

All Transactions	Transaction	Ref #	Amount	Balance
Jul-15-2023	Invoice	11832M	49.00	0.00
Mar-31-2023	Click to open an invoice.	P-9149M	1,542.90	0.00
Mar-31-2023	Estimate	P-9151M	10.00	0.00
Nov-10-2022	If it hasn't expired, invoices can be printed or paid	P-8750M	1,981.24	0.00
Sep-13-2022	Estimate	P-8596M	1.07	0.00
Sep-13-2022	If it hasn't expired, estimates can be converted to an invoice.	P-8599M	1.07	0.00
Sep-13-2022	Estimate	P-8602M	2.15	0.00
Sep-06-2022	Estimate	P-8620M	4.00	0.00
Sep-05-2022	Estimate	P-8619M	3.00	0.00
Jul-21-2022	Estimate	P-8458M	200.00	0.00

1 - 10 of 22 records.

Send us a message

Send

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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Home Recent Transactions Serial Numbers Maintenance Reports Free Webinars My Training JD

Back Estimate:P-9149M Print

TCG Portal Demo 1,542.90 Total

Billing	Shipping	Date
TCG Portal Demo	TCG Portal Demo	Mar-31-2023
Jennifer DiBona	Jennifer DiBona	Due
bCity1, bState1 bZip1	sCity1, sState1 sZip1	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
Total	1,542.90

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 longer be available on this Estimate

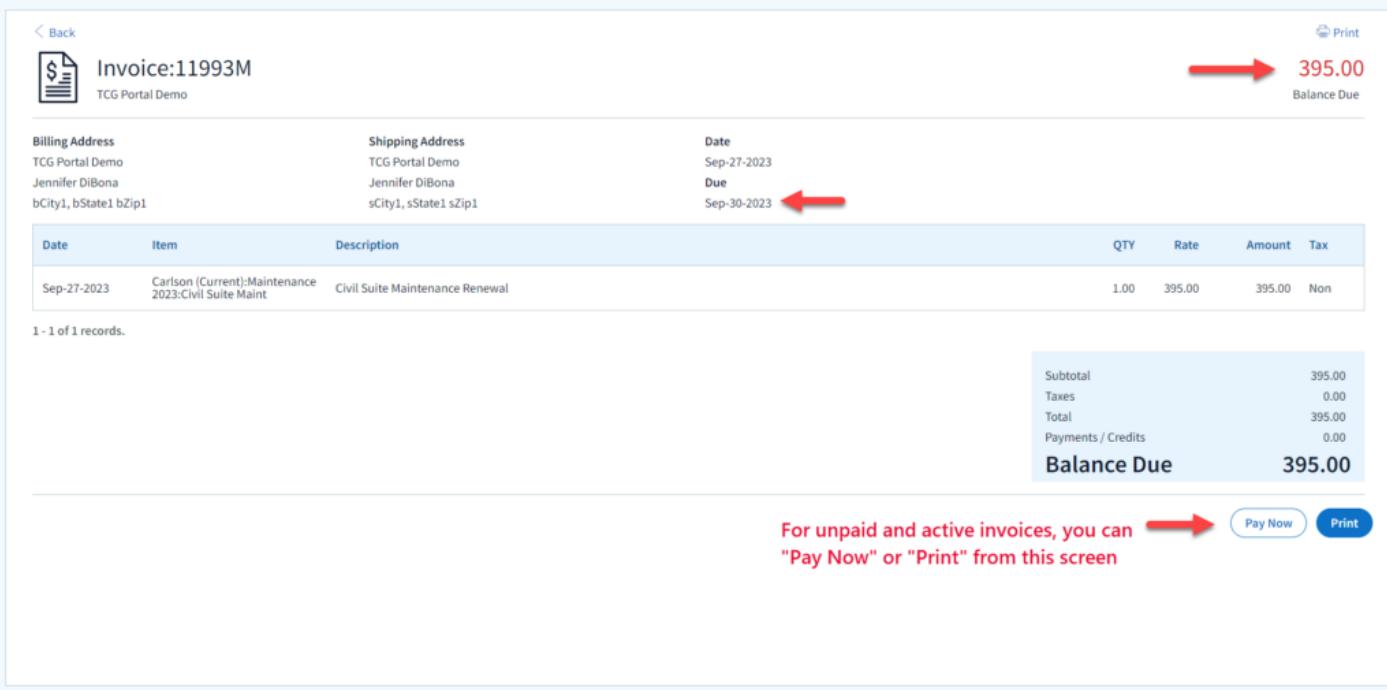
Create Invoice Accept & Pay Print

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.



The screenshot shows an invoice page for TCG Portal Demo. At the top right, there is a red arrow pointing to the 'Print' button. The invoice number is 11993M. The total amount is 395.00, with a red arrow pointing to the 'Balance Due' section. A red arrow also points to the due date, Sep-30-2023, in the shipping address section. The table below shows one record: Carlson (Current):Maintenance 2023:Civil Suite Maint, Civil Suite Maintenance Renewal. The total amount is 395.00. At the bottom, there is a note: 'For unpaid and active invoices, you can "Pay Now" or "Print" from this screen' with a red arrow pointing to the 'Pay Now' and 'Print' buttons. The note is in red text.

JTNDYSUyMG5hbWUlM0QlMjJzZXJpYWxudW1iZXJzdGFiJTIyJTIwaWQlM0QlMjJzZXJpYWxudW1iZXJzdGFiJTIyJTNFJTIwJTNDJTJGYSUzRQ==**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.

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

Advanced

Serial Number (Active)	Product + Version	Config	Upgraded From (Inactive)	Maintenance Expires	Customer Notes
12058625-SurvNET-xxxxSN	SurvNet (R14)	test 12/22		Use customer to track anything that's important	test
12058625-58B1140-xxxxSN-6934	Survey (2022)		11403265-58B1140-xxxxUPG-1082466	Aug-29-2023	THESE ARE CUSTOMER NOTES ABOUT XXXX-XXXX-SURVEY-XXXX
XXXX-XXXX-SURVEY-XXXX	Survey (2021)			Jan-25-2021	THESE ARE CUSTOMER NOTES
XXXX-XXXX-CIVIL SUITE-XXXX	Civil Suite (2022)	Survey, Civil, Hydrology, GIS	XXXX-XXXX-CIVIL SUITE-UPGRADE-XXXX	Sep-01-2022	about this serial number!
000123456 SN	Networked Carlson Software (2022)	Surveyx2,Civilx3,Hydrox2,GSx2	98765432100 upg	Dec-31-2022	these are our customer notes
Testing123	Civil Suite Network (2020)			Feb-04-2022	For instance: Whose computer it's installed on
TEST4321	Civil Network (2021)				these are our customer notes about TEST 1234
TEST1234 SN	Survey OEM (2021)		TEST 1234 UPG		

1 - 8 of 8 records.

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Have a question? Contact Us!

ContactUs@ThatCADGirl.com

Also, clicking on any serial number in the list brings you to a details page where you can add any “Customer 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.

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/uploads/updates05.php?ss_email=&product=Carlson&ss_email=&version=2022

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

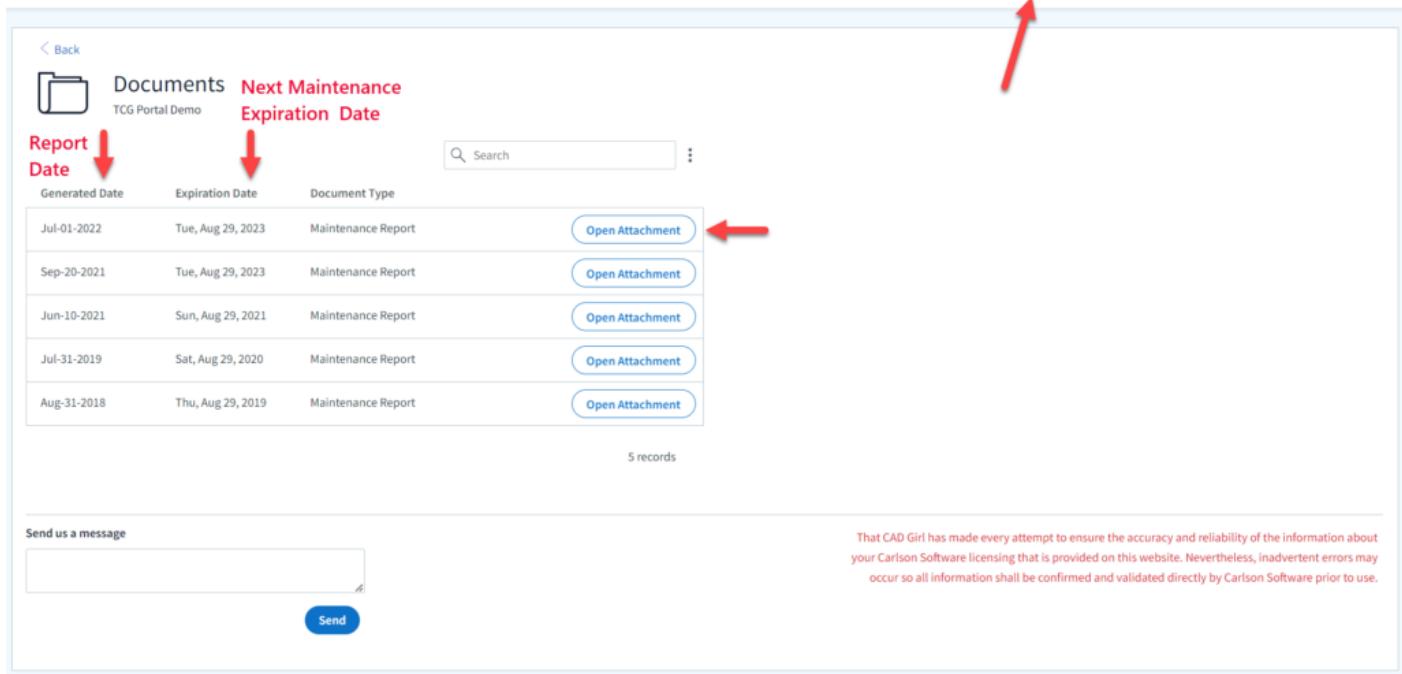
[Save](#) [Email SN Details](#)

Have a question? Contact Us!

ContactUs@ThatCADGirl.com

JTNDYSUyMG5hbWUlM0QlMjJtYwludGVuYW5jZXJlcG9ydHN0YWlMjIlMjBpZCUzRCUyMm1haW50ZW5hbmNlcmlcmVwb3J0c3RhYiUyMiUzRSUyMCUzQyUyRmElM0U=**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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TCG Portal Demo

Report Date

Generated Date Expiration Date Document Type

Generated Date	Expiration Date	Document Type	
Jul-01-2022	Tue, Aug 29, 2023	Maintenance Report	Open Attachment
Sep-20-2021	Tue, Aug 29, 2023	Maintenance Report	Open Attachment
Jun-10-2021	Sun, Aug 29, 2021	Maintenance Report	Open Attachment
Jul-31-2019	Sat, Aug 29, 2020	Maintenance Report	Open Attachment
Aug-31-2018	Thu, Aug 29, 2019	Maintenance Report	Open Attachment

5 records

Send us a message

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Send

Have a question? Contact Us!

ContactUs@ThatCADGirl.com

JTNDYSUyMG5hbWUlM0QlMjJ3ZWJpbmFyc3RhYiUyMiUyMGlkJTNEJTIyd2ViaW5h
 cnN0YWIlMjIlM0UlMjAlM0MlMkZhJTNF **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

[Back](#)

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	Action
Oct-27-2023	Working With Sheet Sets with Travis Maxwell https://attendee.gotowebinar.com/register/2684298643763949147	Click to Register or Join In Progress
Oct-25-2023	Stormwater Channel Design in Carlson Software with Travis Maxwell https://attendee.gotowebinar.com/register/1298711682626467161	Click to Register or Join In Progress
Oct-18-2023	Site Project Grading https://attendee.gotowebinar.com/register/7477439265145641557	Click to Register or Join In Progress
Oct-12-2023	Tips & Tricks in Carlson Software with Travis Maxwell https://attendee.gotowebinar.com/register/454412096819171932	Click to Register or Join In Progress
Oct-10-2023	Introduction to Carlson Software: Settings, Setup, Configuration & Points https://attendee.gotowebinar.com/register/8048995094660379477	Click to Register or Join In Progress

5 records

Webinars Certificates

Certificates for Webinars you have attended.

Webinar Date	Webinar Name	Time In Session (HH:MM)	Action
Sep-08-2022	All About Coordinates in Carlson Software	01:01	Print Certificate

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

Send us a message

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

Have a question? Contact Us!
ContactUs@ThatCADGirl.com

[Send Request](#)

JTNDYSUyMG5hbWUlM0QlMjJwYwlkdHJhaW5pbmd0YWIlMjIlMjBpZCUzRCUyMnBh
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

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Home Recent Transactions Serial Numbers Maintenance Reports Free Webinars My Training

Back

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

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

Recordings of Past Trainings    Click to expand

Date of Session	Training / Session	Link
No Results Found		

0 records

Send us a message

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

Have a question? Contact Us!

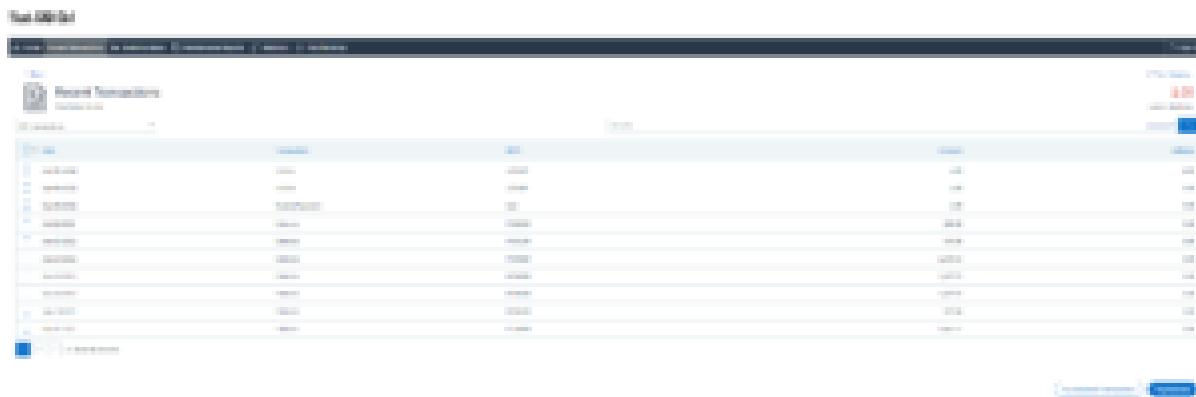
Find Answers on your new That CAD Girl Portal

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

Every portal is specific for the email address we have on file for you and you can access yours by following this link and entering your email address.

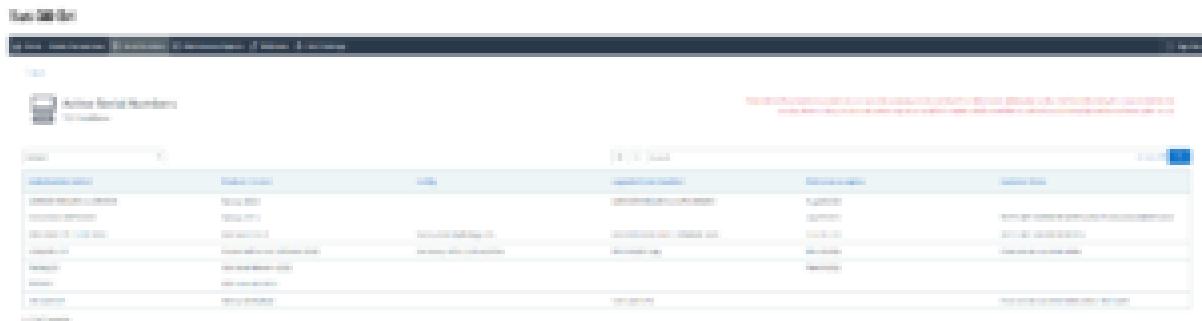
The availability of tabs on your portal will depend on whether you have been granted Full Access by the primary contact in your company or if you have Restricted Access. Everyone will have Home, Webinars and Paid Training tabs while those with Full Access will have access to Transactions, Serial Numbers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

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.



Serial Numbers – On this tab, you can see a list of 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.

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[Back](#)

Serial Number^{*}

12345678-1234-1234-1234-123456789012

Product Name^{*}

Survey

Product Version^{*}

2022

Config

Upgraded From

12345678-1234-1234-1234-123456789012

Maintenance Expires

Aug 29 2023

Customer Notes

Download Link

https://www.carlsonsoft.com/files/uploads/uploads/2022.php?os_crypt=Apricot>Carlsonsoft_email>version=2022

Link to Install Instructions

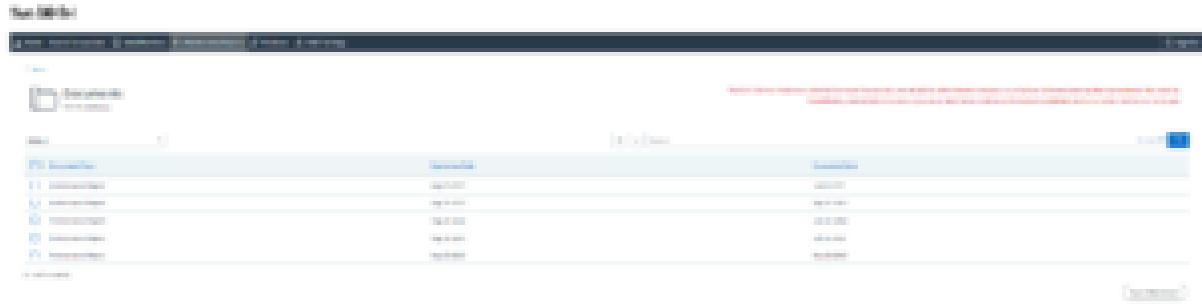
<https://thatcadgirl.com/anydesk-loading-installing-registering-your-software/>

[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.

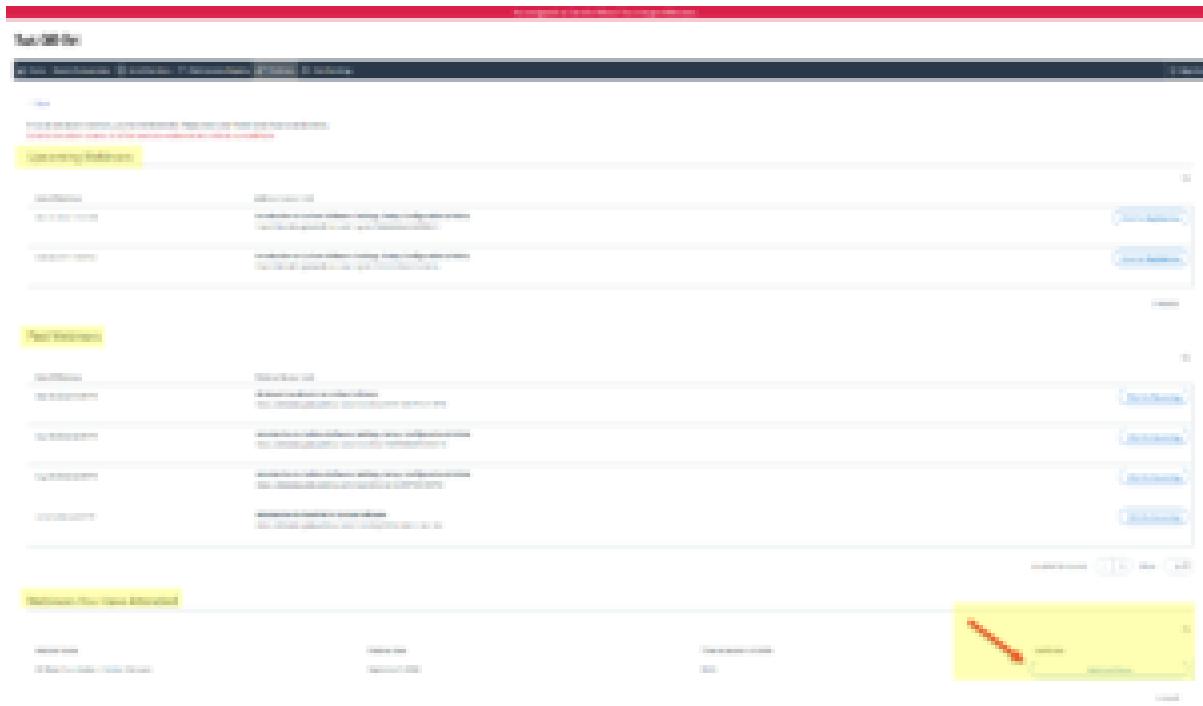
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Webinars – This tab is accessible to all users although the information will vary depending on your Company's webinar eligibility (see Home tab). The information on this screen is broken down into 3 tables:

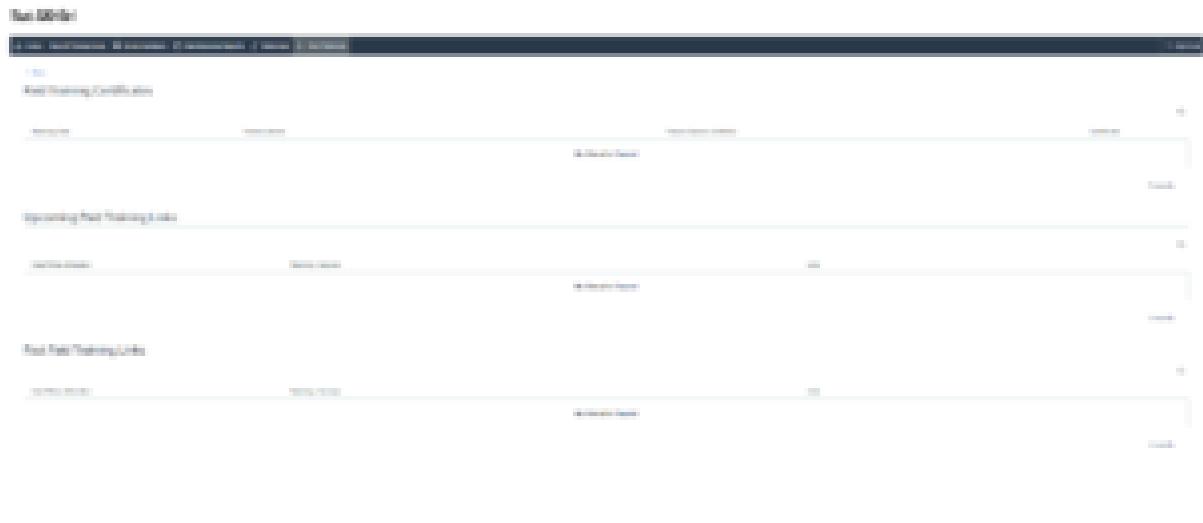
- A list of Upcoming sessions in our Webinar Series with links to pre-register
- A list of Past sessions in our Webinar Series with links to the recording
- A list of sessions the user has attended with a link to download a Certificate of Attendance



The screenshot shows a software interface with a red header bar. Below it is a dark blue navigation bar with several icons. The main content area has a white background with three distinct sections, each with a yellow header bar. The first section is labeled 'Upcoming Sessions' and contains a table with four rows. The second section is labeled 'Past Sessions' and contains a table with five rows. The third section is labeled 'Download Your Certificate' and contains a single button. A red arrow points from the text in the following paragraph to the 'Download Your Certificate' button.

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



That CAD Girl

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