

Instructions

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Introduction

Conditions of Use

The S&C Customer Portal is the property of S&C Electric Company, Chicago, IL, and may not be sold, nor may any part of the program source code be used to produce a commercial, marketable product.

Cookies are used for the best online experience. By using our website, you agree to our use of cookies in accordance with our privacy policy. The privacy policy is stated at this link: <https://www.sandc.com/en/privacy-notice/>.

Help and Support

If any portion of this instruction sheet is unclear and assistance is needed, contact the nearest S&C Sales Office or call the S&C Global Support and Monitoring Center at 1-888-762-1100. Telephone numbers are also listed on S&C's website, **sandc.com**

About the Customer Portal

S&C customers can use this secure website to download software and technical documentation, view order statuses, track RMAs, manage support cases, licenses, and other assets.

Understanding Your Customer Portal Credentials

Customer Portal credentials can be obtained by completing the form at <https://www.sandc.com/en/contact-us/customer-portal/> or contacting the Global Support and Monitoring Center (GSMC) at 1-888-762-1100.

The Customer Portal is accessed at:

<https://www.sandc.com/en/contact-us/customer-portal/>

Two types of user profiles are available:

- **Manager.** Users with Manager credentials can view all Sales Orders, RMA Orders, and Cases assigned to the company.
- **Standard.** Users with Standard credentials can view all RMA Orders and all Sales Orders. They will only see their own Cases, or Cases that have been assigned to them.

There are a variety of permissions separately assigned to user profiles when Customer Portal credentials are created:

- **Licensing and Assets Access.** When a product requiring licensing or an activation file has been purchased by a customer, the licensing information and activation files will be available in the menu under “Licensing and Assets.” If a customer does not have a licensed product in their inventory, this menu item will not appear.
- **Application Access.** All users are assigned permissions to use the Coordinaide™ — The S&C Coordination and Protection Assistant. There are other product-specific applications that are only available to users or prospective users of a product. Contact the GSMC for more information.
- **Distributor Access.** If the Manager or Standard user’s company designation is that of an S&C Authorized Distributor, an additional permission is applied allowing an Authorized Distributor to view the end customer name on orders. See the description of the *Orders* screen on page 7.

Home Dashboard

The *Home Dashboard* screen displays three frequently used menu items across the top of the screen and information on recent account activity, including: **Recently Shipped Orders**, **Recent Support Cases**, and **Recently Viewed Files**. To the left side of the *Home Dashboard* is the **Main** menu. Each **Main** menu item will be described in the following sections. See Figure 1.

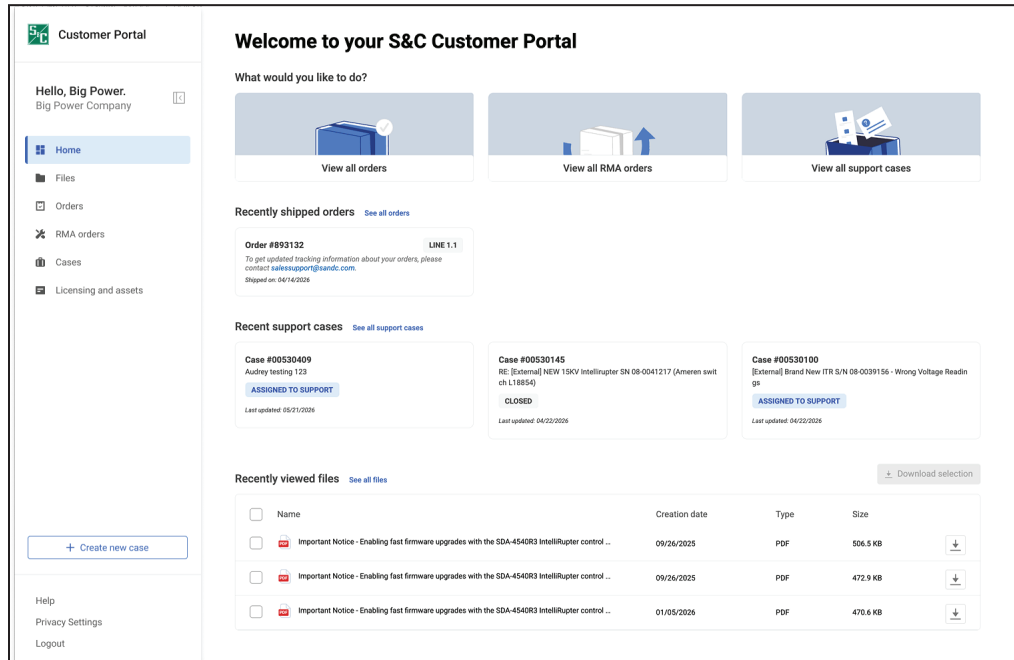


Figure 1. The *Home Dashboard* screen.

Files

The *Files* screen shows the downloadable files available to each customer. See Figure 2. The files available will be specific to each customer and their company's inventory of S&C products.

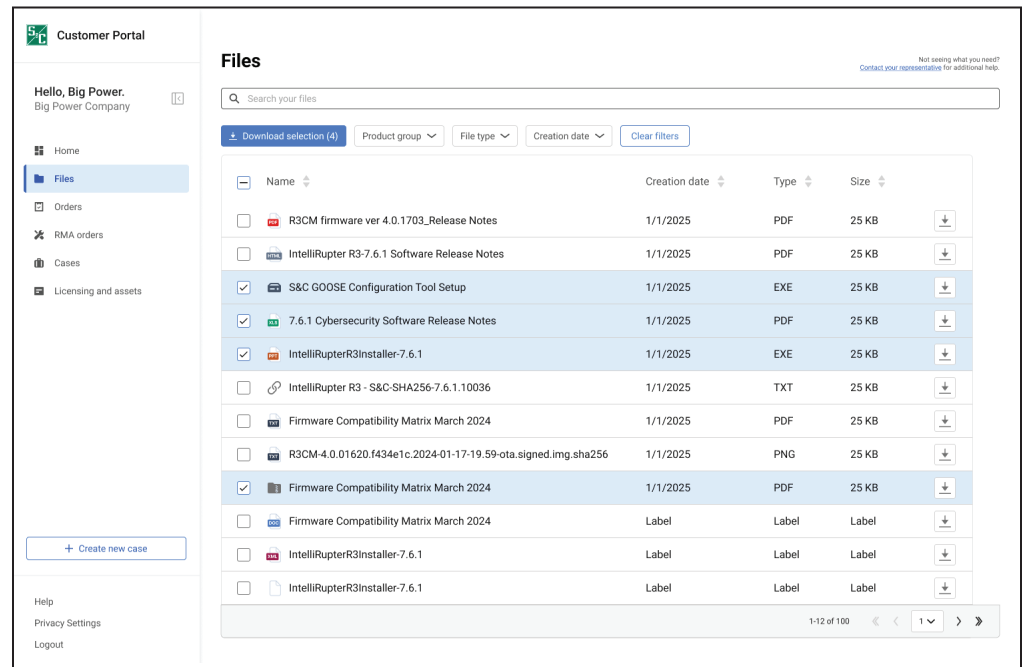


Figure 2. The *Files* screen.

Available files typically include:

- **Software installers.** For S&C software products or authorized third-party software.
- **Firmware update files.** Depending on the product the file is used for, the firmware update may be either an .exe or .txt file. See the product's Instruction Sheet for details.
- **Product configuration files.** Files related to a support case may be provided here as a .xspt or .txt file.
- **Instruction sheets.** S&C Instruction Sheets are provided in PDF format. Instruction Sheets for third-party equipment installed with S&C products (i.e., relays, radios, etc.) may also be provided in the third-party equipment manufacturer's preferred format.
- **Release notes.** Release notes are provided in PDF format and give information on new software or firmware releases. They are numbered to correspond with the software or firmware release.

Note: Other files or file types pertinent to a support case may be uploaded directly to the case upon creation or added post-creation.

The *Files* screen includes a dynamic search tool. Files can also be sorted by creation date, file type, and file size using the filtering buttons. Files are downloadable by selecting the checkbox to the left of the file names and clicking on either the **Download Selection** button to download multiple files or the **Download** icon directly on the right-hand side to download individual files. Selecting the checkbox to the left of the **Name** column header will select all files available to the user. The **Download Selection** button will remain grayed out until a file is selected.

Clicking on a file name in the table will open the File Details panel which provides a preview of the file. Not all file types can be fully previewed. See Figure 3.

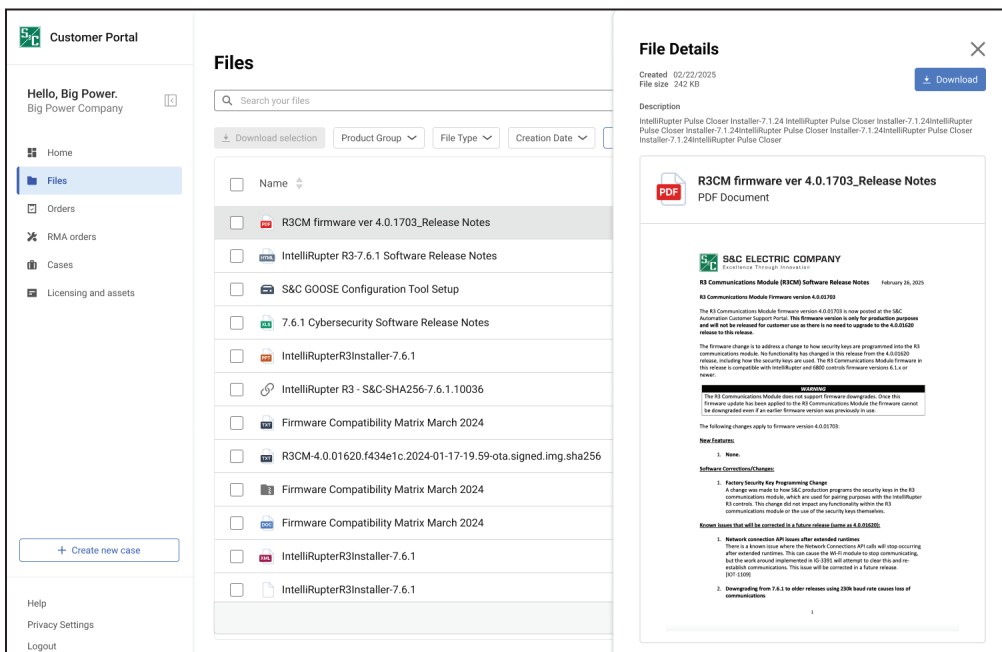


Figure 3. File Details preview panel.

Orders

The *Orders* screen shows active and completed sales orders. See Figure 4. The *Orders* screen includes a dynamic search tool. Orders can be also be sorted by their menu item, **Order Line Number**, **PO Number**, **Product Group**, individual **Catalog Number**, **Status**, **Quantity**, or **Projected Ship Date**.

The screenshot displays the 'Orders' section of a customer portal. On the left is a navigation sidebar with options like Home, Files, Orders, RMA orders, Cases, and Licensing and assets. The main content area features a search bar and filter buttons for 'In progress', 'Shipped', and 'Closed'. Below these is a table of orders with columns for Order line number, PO number, Product group, Catalog number, Qty, Status, and Projected ship date. The table shows 14 rows of data, with statuses ranging from 'ORDER SCHEDULED' to 'ORDER ENTERED'. A '+ Create new case' button is visible at the bottom left of the main area, and a '1-9 of 9' indicator is at the bottom right.

Figure 4. The *In Progress Orders* screen.

Orders are displayed using the toggle menu buttons. Three buttons are displayed: **In Progress**, **Shipped**, and **Closed**.

The order information on the current table view can be downloaded to a .csv file that can be opened in a text or spreadsheet program. To download, click on the **Export to CSV** button.

In Progress Orders

In Progress orders have been booked but not shipped. See Figure 4. When the **In Progress** toggle button is selected, six fields are shown:

- **Order line number.** This is the S&C assigned Sales Order number followed by the line number. A line number is simply the number of the line on which the item appears on the Sales Order.
- **PO number.** This is the customer's purchase order number.
- **End customer.** Only visible to customers designated as an S&C Authorized Distributor, this field provides information on the end recipient of the order if provided by the Authorized Distributor. (Not shown.)

- **Product group.** This is the product group/category of the ordered product.
- **Catalog number.** This is the configured catalog number, including any options and information on the product's Erection Drawing (ED) number. Custom engineered orders have an "-S####" designation at the end of the catalog number where "S" stands for "special," and the number is the identifier that corresponds to any custom drawings and/or product modifications made by custom engineering.
- **Qty.** Quantity ordered.
- **Status.** There are four statuses for In Progress orders:
 - **In Production.** The order has been scheduled and is being manufactured.
 - **In Review.** The order is with a production planner for scheduling.
 - **Order Entered.** The order has been booked but not scheduled.
 - **Order Scheduled.** The order has been scheduled but not shipped.
- **Projected ship date.** The projected ship date is based on the status of the order.

When an In Progress order is selected by double-clicking it, more details about the order will be displayed. See Figure 5.

The screenshot shows the 'Customer Portal' interface for 'Big Power Company'. The main content area displays 'Order #931249' with a status of 'IN PRODUCTION'. A progress indicator shows the order has moved through 'Order entered', 'In review', and 'Order scheduled' to 'In production'. Key details include a projected ship date of 11/25/2027, a catalog number of 863034-A1A2A3B1B2B3D1D2D3L2P4R11-S106, and a quantity of 1. A table lists other items in the order, including a quantity of 10 for item 2.1.

Item	Catalog number	Qty.
1.2	863034-A1A2A3B1B2B3D1D2D3L2P4R11-S106	1
2.1	ITN0980-AS041	10

Figure 5. Order Details screen showing In Progress status.

Shipped Orders

Shipped orders have been manufactured and packaged and have been moved to shipping. See Figure 6. When the **Shipped** toggle button is selected, six fields are shown:

Order line number	PO Number	Product group	Catalog number	Qty.	Status	Ship date
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	11	SHIPPED	12/17/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	11	SHIPPED	12/16/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	3	SHIPPED	12/15/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	3	SHIPPED	12/14/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	3	SHIPPED	12/14/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	1	SHIPPED	11/30/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	1	SHIPPED	11/30/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	1	SHIPPED	11/30/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	3	SHIPPED	11/30/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	3	SHIPPED	11/30/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	3	SHIPPED	11/30/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	3	SHIPPED	11/30/2025

Figure 6. Shipped Orders screen.

- **Sales order and line number.** This is the S&C assigned Sales Order number followed by the line number.
- **PO number.** This is the customer's purchase order number.
- **Product group.** This is the product group/category of the ordered product.
- **End customer.** This field provides information only visible to customers designated as an S&C Authorized Distributor, this field provides information on the end recipient of the order if provided by the Authorized Distributor.
- **Catalog number.** This is the configured catalog number, including any options and information on the product's Erection Drawing (ED) number. Custom engineered orders have an "-S####" designation at the end of the catalog number where "S" stands for "special," and the number is the identifier that corresponds to any custom drawings and/or product modifications made by custom engineering.
- **Qty.** Quantity ordered.
- **Status.** Shipped orders only have the status of **Shipped**.
- **Ship date.** The actual ship date of the order.

A shipped order can be opened by double-clicking it. More details about the order are displayed on the *Orders Detail* screen, including tracking information and shipping address. See Figure 7.

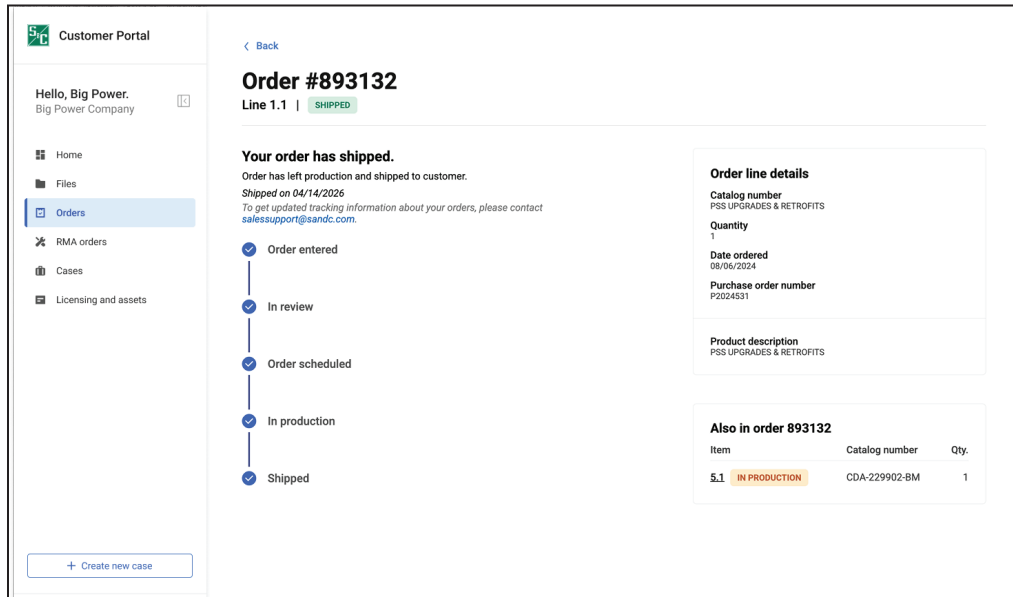


Figure 7. Order Details screen showing Shipped status.

Closed Orders

Closed orders have been invoiced. See Figure 8. When the **Closed** button is selected, six fields are shown:

The screenshot shows the 'Customer Portal' interface for 'Big Power Company'. The 'Orders' section is active, displaying a table of closed orders. The table has columns for Order line number, PO number, Product group, Catalog number, Qty, Status, and Closed date. The 'Closed' filter is selected, and the table shows 9 rows of data. A '+ Create new case' button is visible at the bottom left of the main content area.

Order line number	PO number	Product group	Catalog number	Qty	Status	Closed date
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	11	CLOSED	4/18/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	11	CLOSED	4/17/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	3	CLOSED	4/16/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	3	CLOSED	4/15/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	3	CLOSED	4/14/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	1	CLOSED	4/14/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	1	CLOSED	4/14/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	1	CLOSED	4/14/2025
838344 - 1.1	21009933843	TripSaver	TRIPSAVER II-4126795	3	CLOSED	4/14/2025

Figure 8. The **Closed Orders** screen.

- **Order line number.** This is the S&C assigned Sales Order number followed by the line number. A line number is simply the number of the line on which the item appears on the Sales Order.
- **PO number.** This is the customer's purchase order number.
- **End customer.** Only visible to customers designated as an S&C Authorized Distributor, this field provides information on the end recipient of the order if provided by the Authorized Distributor. (Not shown.)
- **Product group.** This is the product group/category of the ordered product.
- **Catalog number.** This is the configured catalog number including any options and information on the product's Erection Drawing (ED) number. Custom engineered orders have an "-S####" designation at the end of the catalog number where "S" stands for "special," and the number is the identifier that corresponds to any custom drawings and/or product modifications made by custom engineering.
- **Qty.** Quantity ordered.
- **Status.** Closed orders only have the status of **Closed**.
- **Ship date.** The actual ship date of the order.

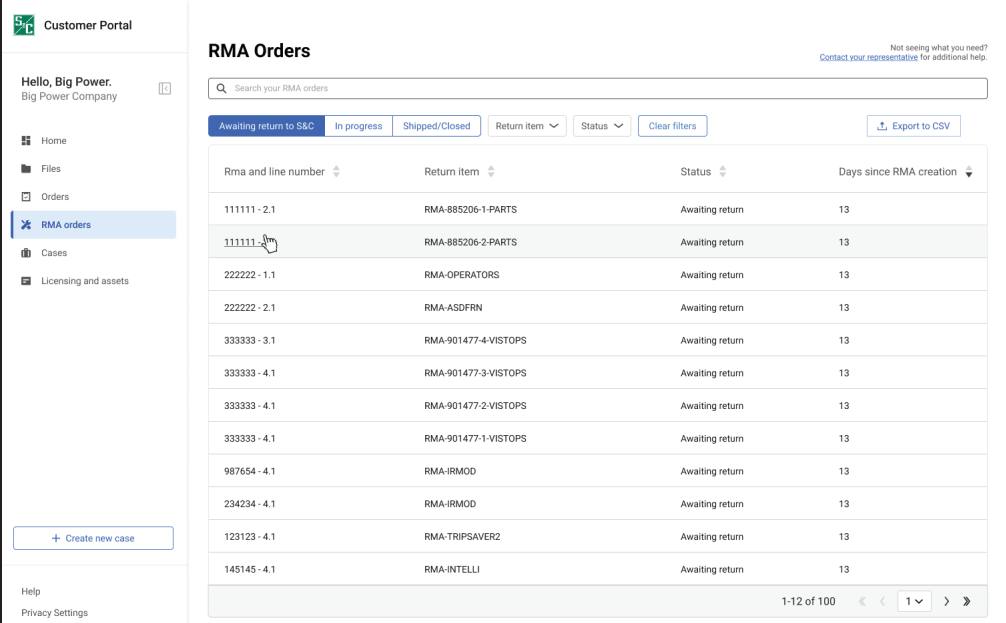
RMA Orders

The *RMA Orders* screen shows active and completed Returned Material Authorization (RMA) Orders. These are products that the user is returning to S&C either for credit, exchange, evaluation, or repair. See Figure 9.

The *RMA Orders* screen includes a search toolbar across the top. The search structure is dynamic. RMA Orders can be sorted by RMA and Line Number, Return Item Type, Status, and Days Since RMA Creation. An RMA Order may be related to a case that was opened with S&C.

RMA Orders are displayed by using the **Status** toggle menu buttons. Three buttons are displayed: **Awaiting return to S&C**, **In Progress**, and **Shipped/Closed**.

The information on these menus can be downloaded to a .csv file that can be opened in a text or spreadsheet program. To download, click on the **Export to CSV** button.



Customer Portal

Hello, Big Power.
Big Power Company

Home
Files
Orders
RMA orders
Cases
Licensing and assets

+ Create new case

Help
Privacy Settings

RMA Orders

Not seeing what you need?
Contact your representative for additional help.

Search your RMA orders

Awaiting return to S&C | In progress | Shipped/Closed | Return item | Status | Clear filters | Export to CSV

Rma and line number	Return item	Status	Days since RMA creation
111111 - 2.1	RMA-885206-1-PARTS	Awaiting return	13
111111	RMA-885206-2-PARTS	Awaiting return	13
222222 - 1.1	RMA-OPERATORS	Awaiting return	13
222222 - 2.1	RMA-ASDFRN	Awaiting return	13
333333 - 3.1	RMA-901477-4-VISTOPS	Awaiting return	13
333333 - 4.1	RMA-901477-3-VISTOPS	Awaiting return	13
333333 - 4.1	RMA-901477-2-VISTOPS	Awaiting return	13
333333 - 4.1	RMA-901477-1-VISTOPS	Awaiting return	13
987654 - 4.1	RMA-IRMOD	Awaiting return	13
234234 - 4.1	RMA-IRMOD	Awaiting return	13
123123 - 4.1	RMA-TRIPSAVER2	Awaiting return	13
145145 - 4.1	RMA-INTELLI	Awaiting return	13

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Figure 9. The *RMA Orders* screen.

Awaiting Return to S&C

toggling the **Awaiting Return to S&C** button shows approved RMA Orders that have not been received at S&C Electric Company. When the **Awaiting return to S&C** button is selected, four fields are shown:

- **RMA and line number.** This is the S&C-assigned RMA number followed by the line number. A line number is simply the number of the line on which the item appears on the RMA Order.
- **Return item.** This is the product group of the returned product.
- **Status.** The only status available is **Awaiting Return**.
- **Days since RMA creation.** Gives the duration in days since the RMA Order was created.

In Progress

Toggling the **In Progress** button shows approved RMA Orders that have been received at S&C Electric Company. See Figure 10. When the **In Progress** button is selected, four fields are shown:

The screenshot shows the Customer Portal interface for RMA Orders. The left sidebar contains navigation options: Home, Files, Orders, RMA orders (selected), Cases, and Licensing and assets. The main content area is titled 'RMA Orders' and features a search bar and filter buttons: 'Awaiting return to S&C', 'In progress' (selected), 'Shipped/Closed', 'Return item', 'Status', 'Projected ship date', 'Clear filters', and 'Export to CSV'. A table displays the following data:

Rma and line number	Return item	Status	Projected ship date
111111 - 2.1	RMA-885206-1-PARTS	Material received and awaiting evaluation	Date pending
111111 - 3.1	RMA-OPERATORS	Material evaluation complete	4/14/2025
222222 - 1.1	RMA-ASDFRN	Repair/order in progress	4/14/2025
222222 - 2.1	RMA-901477-4-VISTOPS	Repair/order scheduled	4/14/2025
333333 - 3.1	RMA-885206-2-PARTS	Material evaluation complete	4/14/2025
333333 - 4.1	RMA-901477-3-VISTOPS	Material received and awaiting evaluation	Date pending
333333 - 4.1	RMA-901477-2-VISTOPS	Repair/order in progress	4/14/2025
333333 - 4.1	RMA-901477-1-VISTOPS	Material received and awaiting evaluation	Date pending
987654 - 4.1	RMA-IRMOD	Material received and awaiting evaluation	Date pending
234234 - 4.1	RMA-IRMOD	Repair/order in progress	4/14/2025
123123 - 4.1	RMA-TRIPSAVER2	Repair/order in progress	4/14/2025
145145 - 4.1	RMA-INTELLI	Repair/order in progress	4/14/2025

The bottom right of the table shows '1-12 of 100' and navigation arrows.

Figure 10. The RMA Orders In Progress screen.

- **RMA and line number.** This is the S&C-assigned RMA number followed by the line number. A line number is simply the number of the line on which the item appears on the RMA Order.
- **Return item.** This is the is the product group of the returned product.
- **Status.**
 - Material Received and Awaiting Evaluation. The RMA Order has been received by S&C and is waiting for evaluation by a service expert.
 - Evaluation Report in Progress. The RMA Order has been evaluated by a service expert and the report is being written.
 - Repair/Order Being Scheduled. Depending on the evaluation, a repair to the equipment may be made, or replacement equipment may be sent. Both need to be scheduled in our production facility.
 - Repair/Order in Progress. The repair or replacement order is being worked on in the factory. (In cases where no repair was required and the equipment is functional, it will be scheduled for return.)
- **Projected ship date.** The projected date for shipping the refurbished or replaced order.

Shipped/Closed

toggling the **Shipped/Closed** button shows complete and shipped RMA Orders. See Figure 11. When the **Shipped/Closed** button is selected, four fields are shown:

Rma and line number	Return item	Status	Ship Date
838344 - 2.1	RMA-885206-1-PARTS	Shipped	4/14/2025
838344 - 3.1	RMA-885206-2-PARTS	Shipped	4/14/2025
838345 - 2.1	RMA-OPERATORS	Shipped	4/14/2025
838346 - 2.1	RMA-ASDFRN	Shipped	4/14/2025
838347 - 2.1	RMA-901477-4-VISTOPS	Closed	4/14/2025
838347 - 3.1	RMA-901477-3-VISTOPS	Closed	4/14/2025
838347 - 4.1	RMA-901477-2-VISTOPS	Shipped	4/14/2025
838347 - 5.1	RMA-901477-1-VISTOPS	Closed	4/14/2025
838348 - 2.1	RMA-IRMOD	Closed	4/14/2025
838348 - 3.1	RMA-IRMOD	Shipped	4/14/2025
003311 - 2.1	RMA-TRIPSAVER2	Shipped	4/14/2025
003389 - 2.1	RMA-INTELLI	Shipped	4/14/2025

Figure 11. The RMA Orders Shipped/Closed screen.

- **RMA and line number.** This is the S&C assigned RMA number followed by the line number. A line number is simply the number of the line on which the item appears on the RMA Order.
- **Return item.** This is the product group of the returned product.
- **Status.**
 - **Evaluation and Disposition Complete.** The evaluation has been completed and the product has been repaired or replaced.
 - **Report Issued.** The RMA Report has been forwarded to the customer.
 - **Shipped.** The product has been shipped.
- **Ship date.** Gives the date the product was shipped to the customer, or in cases where there was no shipment (i.e., a credit was issued), the close date of the RMA.

An RMA Order's details can be viewed by double-clicking on the RMA line number column. More details about the order are displayed in an *RMA Order Details* screen, including tracking information and shipping address. See Figure 12. If the RMA Order is the result of a Case, the CSP number is visible. If the user has access to that Case, there will be a direct link to the *Case Details* screen.

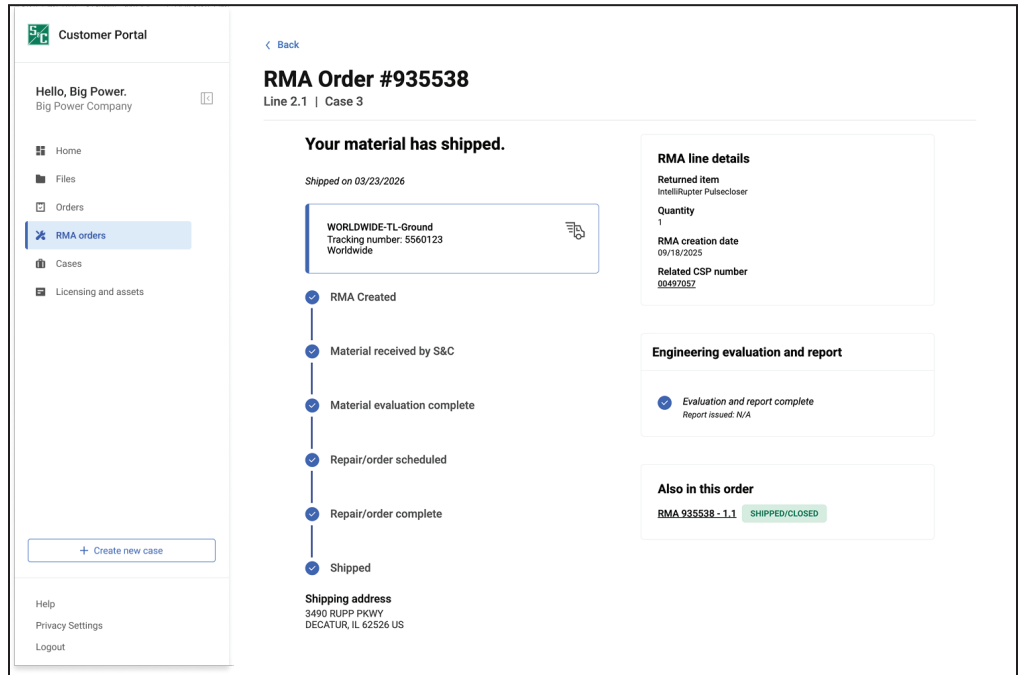


Figure 12. RMA Order Details screen showing a shipped RMA.

Case Number

The *Cases* screen shows a complete record of customer support cases opened with S&C. Users with Standard credentials will see only the cases they have initiated. Users with Manager credentials will see all their company's cases, including who opened each case. The *Cases* screen includes a dynamic search tool. Cases can be also be sorted by **Case Number**, **Subject**, **Status**, **Contact**, or the date **Last Modified**. See Figure 13.

Case No.	Subject	Status	Contact	Last Modified
0033897	IntelliRupter SCADA communication issues	Assigned to support	Audrey Qiu	4/16/2025 10:01 AM
0033897	FPL FMS v4-1 download files	Assigned to support	Audrey Qiu	4/16/2025 10:01 AM
0033897	RMA Request for IntelliRupter switch A957556	Investigating	Audrey Qiu	4/16/2025 10:01 AM
0033897	Series 2000 - Motor Operator - Relay help - Urgent!!!!!!	Investigating	Ted Kim	4/16/2025 10:01 AM
0033897	Requesting RMA for IntelliRupter control module s/n: 4540-S10...	Investigating	Ted Kim	4/16/2025 10:01 AM
0033897	Series 2000 Low Speed Latching Notch Falling Apart	Awaiting product return	Audrey Qiu	4/16/2025 10:01 AM
0033897	Need help with this product and this is a long subject line to sh...	Awaiting product return	Ted Kim	4/16/2025 10:01 AM
0033897	Need help with this product	Awaiting product return	Ted Kim	4/16/2025 10:01 AM
0033897	Sami_A Quote needed for TripSaver II C/N TCMR-23435	Closed	Audrey Qiu	4/16/2025 10:01 AM
0033897	Drawing Request for SO#1232348	Awaiting product return	Ted Kim	4/16/2025 10:01 AM
0033897	S&C Line Rupter - Parts Quote Needed	Closed	Audrey Qiu	4/16/2025 10:01 AM
0033897	Need help with this product	Closed	Ted Kim	4/16/2025 10:01 AM

Figure 13. The Cases screen.

- **Case number** Each case is assigned a unique number.
- **Subject.** A brief description of the customer support issue.
- **Status.** The status of the support case. The statuses include:
 - Assigned to Support.
 - Investigating.
 - Awaiting Product Return.
 - Contact.
 - Closed.
- **Last modified.** The last date the case information was updated.

This information can be downloaded to a .csv file that can be opened in a text or spreadsheet program. To download, click on the **Export to CSV** button.

Case Details Screen

A *Case Details* screen is opened by selecting either the case number or the subject columns. An Upload dialog box is accessible from the screen where the customer or support specialist can upload files related to the case. See Figure 14.

Approved file formats include: '.jpg,' '.jpeg,' '.png,' '.pdf,' '.mov,' '.mp4,' '.doc,' '.docx,' '.xls,' '.xlsx,' '.ppt,' '.pptx,' '.msg,' '.csv,' '.exe,' '.zip,' '.html,' '.xml,' '.evt,' '.xspt,' '.xevt,' '.wfc,' '.vm,' '.txt,' '.log,' '.tgz,' '.heic,' '.htm,' '.xdss,' '.mch' If another type of file needs to be uploaded, use a file compression application to zip the file before uploading.

There is a 500 mb size limit on individual file uploads. A maximum of 100 files can be attached per case.

The screenshot shows the Customer Portal interface for Case #03423001. The sidebar on the left includes navigation links for Home, Files, Orders, RMA orders, Cases (highlighted), and Licensing and assets. The main content area features a 'Back' link, the case title 'Case #03423001', and status indicators 'ASSIGNED TO SUPPORT' and 'RMA REQUESTED' with a 'Last updated: 4/1/2025' timestamp. A central section titled 'RMA had communication module 1111-1111-1111 (Wifi issue: Last operation with device time out several times)' contains an 'Attachments (10)' table. The table lists files such as 'RSCM firmware ver 4.0.1703_Release Notes', 'IntelliRupter R3-7.6.1 Software Release Notes', 'S&C GOOSE Configuration Tool Setup', '7.6.1 Cybersecurity Software Release Notes TNL', and 'IntelliRupterR3installer-7.6.1'. Below the table is a 'Case description' section with a list of diagnostic questions and their answers. On the right side, there are buttons for 'Send new email' and 'View related RMA', and sections for 'Case information' (including Site location, RMA requested, Case type, and Date opened) and 'Product information' (including Product group, Catalog number, and Serial number).

Figure 14. The *Case Details* screen showing a closed support case where an RMA has been created.

If additional communications about the case are required, click on the **Send new email** button. An *Email* screen will pop up with the subject line automatically populated with the case number for ease of tracking. If an RMA is generated as a result of the Case, the **View related RMA** button will go directly to the associated *RMA Order* screen.

Licensing and Assets

The *Licensing and Assets* screen shows available software licenses assigned to the customer's company as well as authorized users of software licenses. There are four tabs across the screen; **Overview**, **All Licenses**, **Assets**, and **Authorized users**. With the exception of the **Download Activation File** button, these screens are informational only. To purchase more licenses, contact your sales representative. To manage your available licenses, call the GSMC at 1-888-762-1100. When the *Licensing and Assets* screen is first opened, the **Overview** tab will display.

Overview

If the customer has access to IntelliTeam® Designer, the activation file can be downloaded by clicking on the **Download Activation File** button. For instructions on how to use the activation file with IntelliTeam Designer, see S&C Instruction Sheet 1044-570.

The rest of the screen is a visual representation of the available licenses for each automation product type. See Figure 16. For more information on license types, see Specification Bulletin 1044-31.

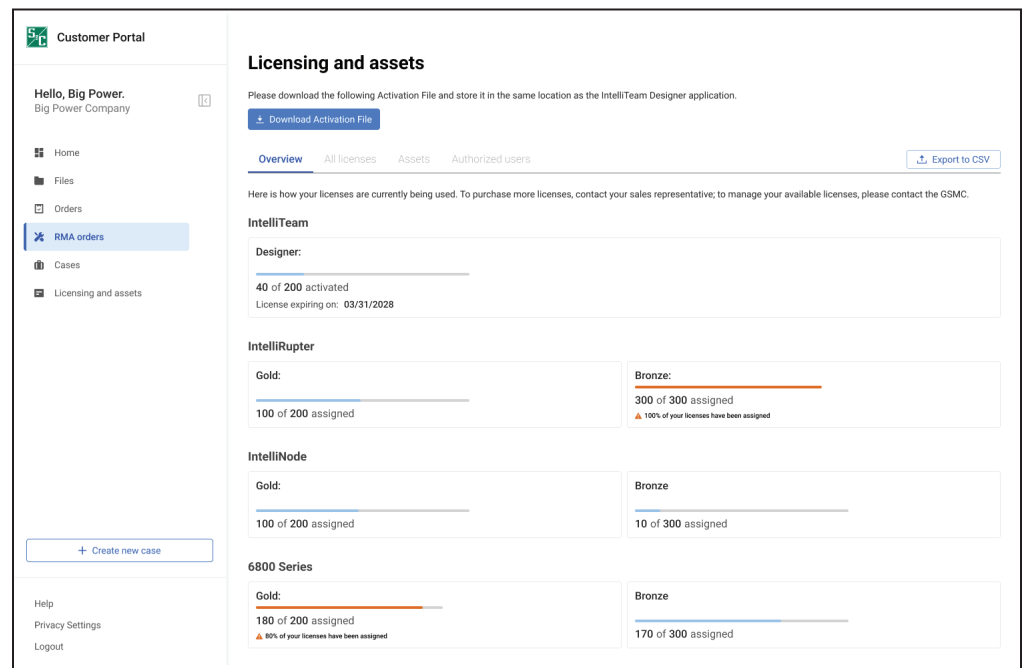


Figure 16. The *Licensing and Assets* screen.

All Licenses

The *All Licenses* screen shows a complete record of each software license assigned to the company by S&C. Licenses can be sorted by **License Number**, the **Licensed Product**, the **Catalog Number** (Software License Catalog Number), the **Qty.**, the **Order Number**, or the **Order Date** the license was issued. See Figure 17.

This information can be downloaded to a .csv file that can be opened in a text or spreadsheet program. To download, click on the **Export to CSV** button.

The screenshot shows the 'Customer Portal' interface for 'Big Power Company'. The main content area is titled 'Licensing and assets' and contains a table of license information. The table has columns for License No., Licensed product, Catalog number, Qty., Order number, and Order date. The table lists 12 licenses with various details. A sidebar on the left contains navigation options like Home, Files, Orders, RMA orders, Cases, and Licensing and assets. At the bottom of the sidebar is a '+ Create new case' button. The main content area also includes a 'Download Activation File' button, an 'Export to CSV' button, and filter options for 'Licensed product' and 'Order date'.

License No.	Licensed product	Catalog number	Qty.	Order number	Order date
13741	Designer License	008-007006-01	1000	598,937	17/02/2022
13758	Designer License	008-007006-01	1	594,980	17/02/2022
14081	Designer Slot	008-007006-01	1	592,256	17/02/2022
14085	Designer Slot	008-007006-01	1	628,415	17/02/2022
14095	IntelliRupter Gold License	008-007006-01	400	628,773	N/A
15038	IntelliRupter Gold License	008-007006-01	1	598,937	N/A
15039	IntelliRupter Bronze License	008-007006-01	2	598,937	N/A
15198	IntelliNode Gold License	008-007101-01	2	598,937	N/A
15635	IntelliNode Gold License	008-009999-99	2	598,937	17/02/2022
1736	IntelliNode Bronze License	008-009999-99	1	598,937	17/02/2022

Figure 17. The All Licenses tab on the *Licensing and Assets* screen.

Assets

The *Assets* screen shows S&C hardware products and any associated license information if applicable. Assets can be sorted by **Asset Name**, **Serial Number**, **Sales Order** (Sales Order Number), **PO Number** (the purchase order number), **User Email**, **Application**, **MAC Address**, **Role**, **Creation Date**, and **Note**. See Figure 18.

This information can be downloaded to a .csv file that can be opened in a text or spreadsheet program. To download, click on the **Export to CSV** button.

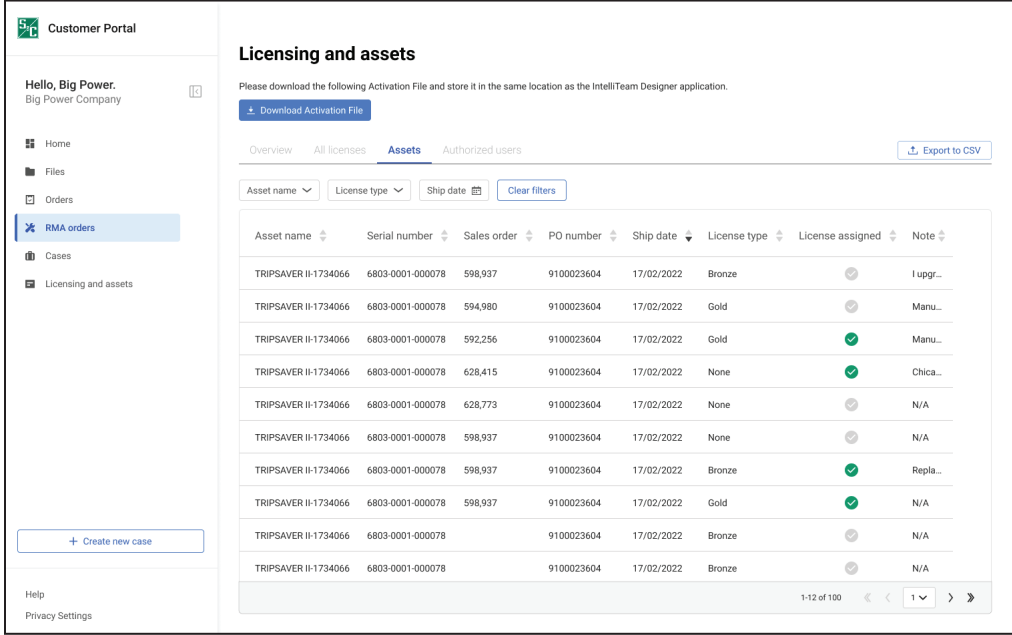


Figure 18. The Assets tab on the *Licensing and Assets* screen.

Authorized Users

The *Authorized Users* screen shows the users authorized for S&C Software Products.

Users can be sorted by **User Email**, **Application**, **MAC Address** (user PC), **Role** (this is the software role, not the company portal credentials), **Ship Date**, **License Type**, **License Assigned** (whether a product has an assigned license), the **Creation Date**, and **Note**. See Figure 19.

This information can be downloaded to a .csv file that can be opened in a text or spreadsheet program. To download, click on the **Export to CSV** button.

Licensing and assets

Please download the following Activation File and store it in the same location as the IntelliTeam Designer application.

[Download Activation File](#)

Overview All licenses Assets **Authorized users** [Export to CSV](#)

User email Application Role Creation date [Clear filters](#)

User email	Application	MAC address	Role	Creation Date	Note
ameer.sami@sandc.com	SG	008-007006-01	Administrator	17/02/2022	Csp 409509
ameer.sami@sandc.com	IntelliLink Remote	008-007006-01	Administrator	17/02/2022	Csp 409509
ameer.sami@sandc.com	HMI Developer	008-007006-01	Administrator	17/02/2022	Csp 409509
ameer.sami@sandc.com	Designer Slot	008-007006-01	Administrator	17/02/2022	Csp 409509
francis.perez@sandc.com	SG	008-007006-01	Administrator	17/02/2022	N/A
francis.perez@sandc.com	IntelliLink Remote	008-007006-01	Administrator	17/02/2022	N/A
francis.perez@sandc.com	HMI Developer	008-007006-01	Administrator	17/02/2022	30 day Temp Assignment...
ted.kim@sandc.com	SG	008-007101-01	Administrator	17/02/2022	30 day Temp Assignment...
ted.kim@sandc.com	IntelliLink Remote	008-009999-99	Administrator	17/02/2022	Email 10/26/2022...
ted.kim@sandc.com	IntelliNode Bronze License	008-009999-99	Administrator	17/02/2022	Email 10/26/2022...

Figure 19. The Authorized Users tab on the *Licensing and Assets* screen.

My Apps

The **My Apps** menu shows the web-based applications accessible by the user. All credential types have access to the Coordinaide™ — The S&C Protection & Coordination Assistant. For more information on the Coordinaide assistant, see S&C Instruction Sheet 100-500.

When other application permissions are assigned to the user, the application names will appear in this menu.

Help

Clicking on the **Help** menu item will display a dialog box showing the contact information for your salesperson along with the numbers for the Global Support and Monitoring Center and the link for the sandc.com help center. See an example in Figure 20.

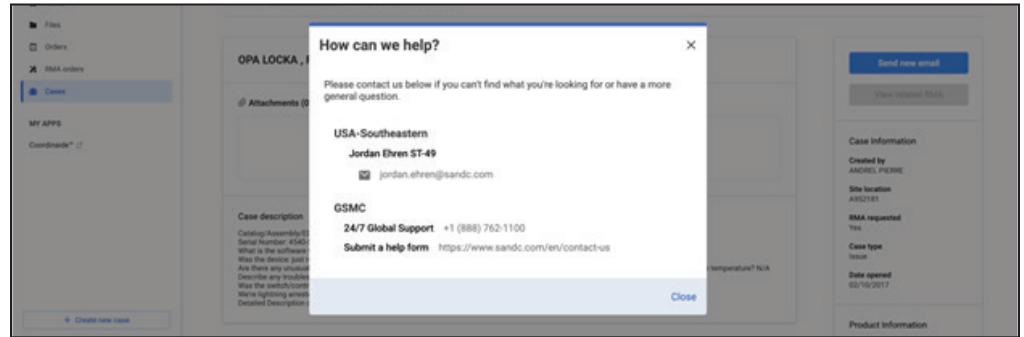


Figure 20. The Help dialog box.

Privacy Settings

Clicking on the **Privacy Settings** menu item will display a dialog box showing the **Privacy** settings available for the Customer Portal. Some cookie permissions are required for website functionality. See Figure 21.

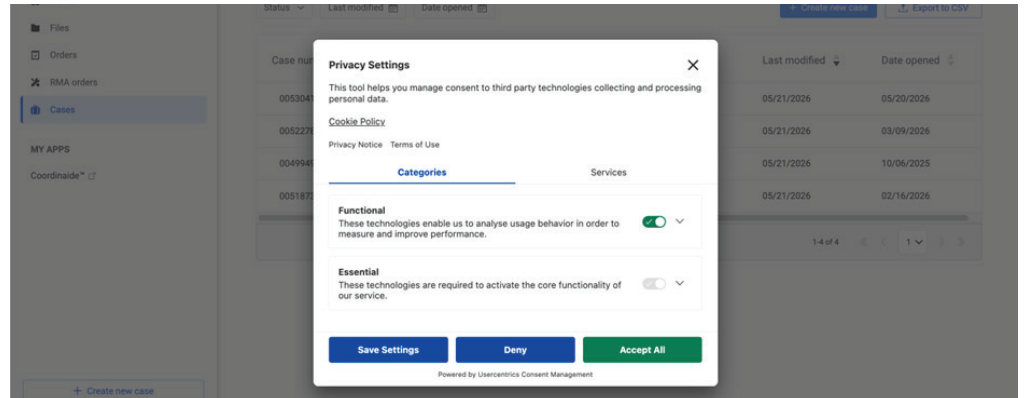


Figure 21. The Privacy Settings dialog box.