

Portals

Keeping Everyone Connected

About Portals:

Our new CastleBranch portals were designed with you in mind. In just a few quick steps, everything from program to package selection can be setup and ready to use.

Here's how:

1: Go to your portal URL and click:



2: Select the appropriate account or program needed. Then select the desired package.



3: This will bring you to our Acknowledgment Page which provides information about your selected package. Users will confirm that they have viewed the information given and then be forwarded to their Order Review Page.

I have read this information

...Done! It's that easy.

Administrators follow the same steps in order to print the Instruction Form within your portal; simply access the portal, select the needed program and package, and then click the print icon located in the top right corner of the page.

Directing your users:

Electronic Distribution

- Provide desired URL within your website or user tracking system.
- Send an email to your users containing the desired URL.
- Send an eVite to your users linking to a specific package code (accomplished through your Admin Portal).
- Request our Customer Experience Team to facilitate a mass eVite on your behalf.
- Reach out to our Customer Experience Team to discuss integration opportunities for the eVite process.

Paper Distribution

- To create handouts, simply access your portal and click the print icon.
- Insert the desired URL within your own packaged materials.