

KEYFACTOR

NEW Customer Portal

QuickStart Guide

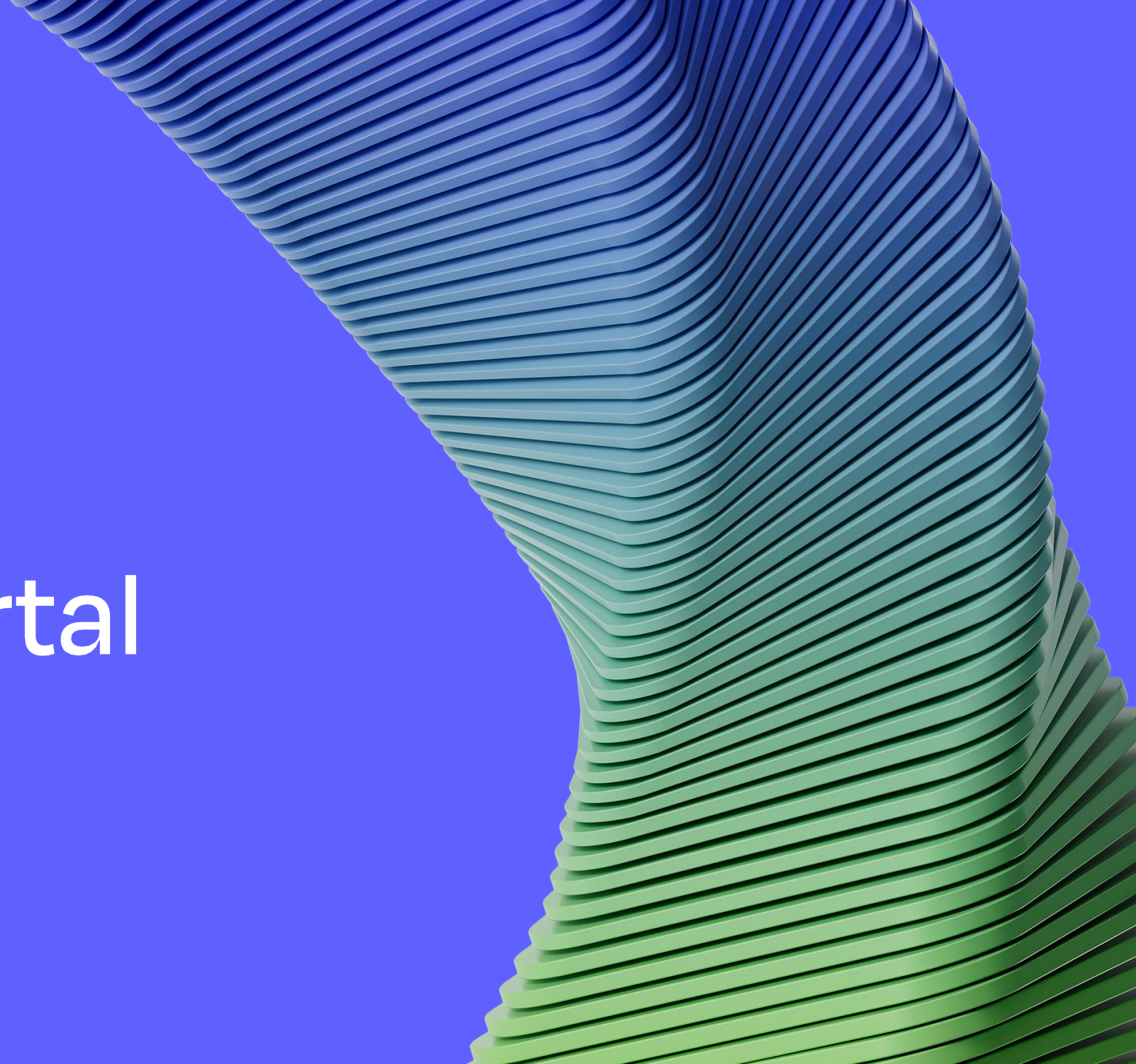
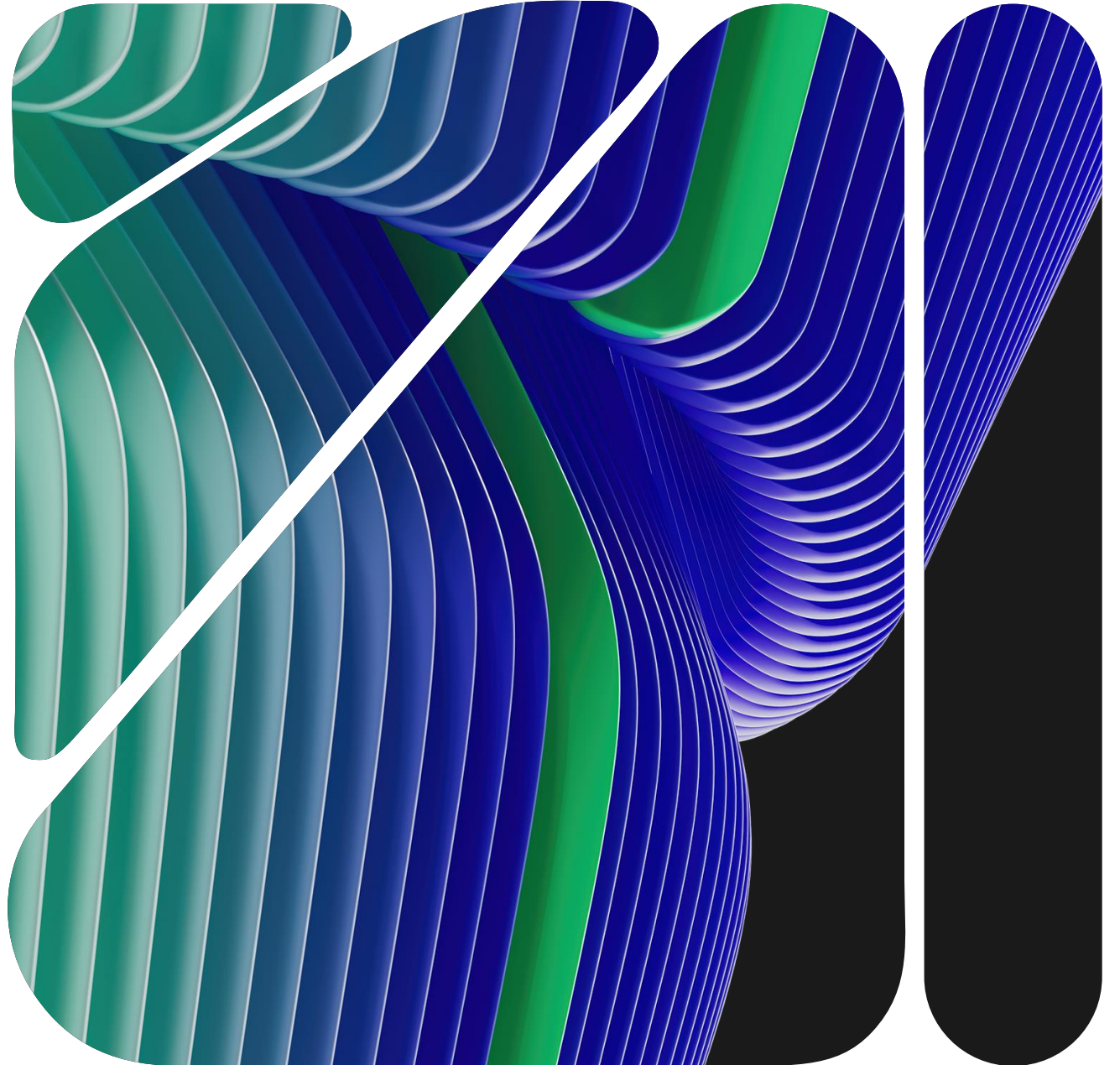


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Streamlined request management, from start to finish.

Are you tired of sifting through attachments and navigating clunky windows just to update a comment on a case? We have heard and understand your frustration and we have exciting news for you.

Introducing our new customer portal, designed to make interacting with support a breeze. No more dragging left and right to read full replies or fumbling through bulky attachments. With our portal redesign, you can manage and organize your requests with ease and efficiency.

Get ready to streamline your workflow and experience a new level of convenience with our latest update.



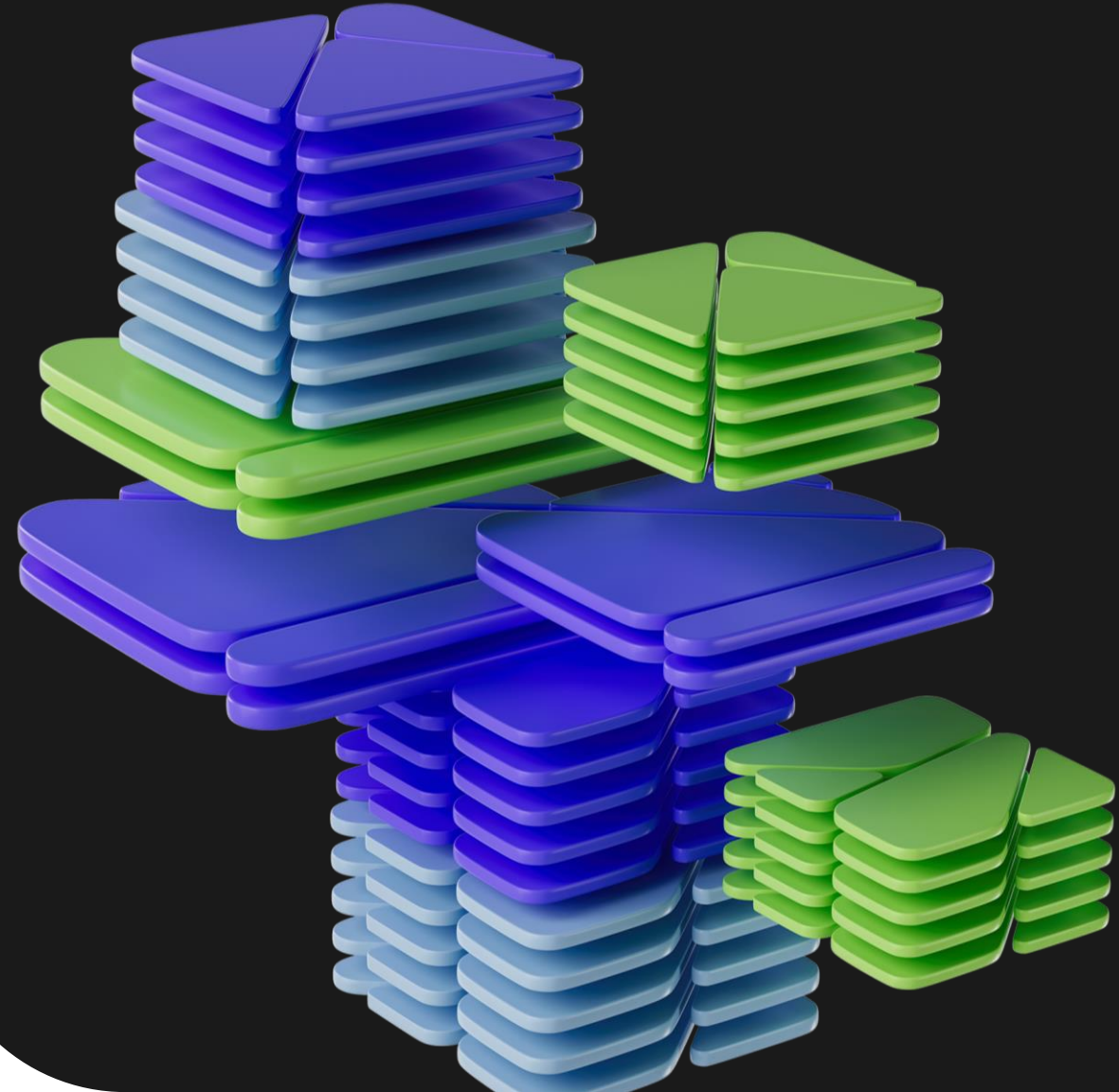
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Integrated knowledge base puts information at your fingertips.

With the launch of our redesigned portal comes our enhanced knowledge base, specifically designed to provide you with a more robust and efficient way to access product documentation.

Our improved knowledge base is now fully searchable, allowing you to easily find relevant information and resources with just a few clicks. Furthermore, we have introduced smart fields which will suggest relevant knowledge base articles while you submit request information, providing you with much requested self-service options.

In addition, we have made it even easier for you to stay up-to-date with news and announcements along with the latest releases and historical downloads.



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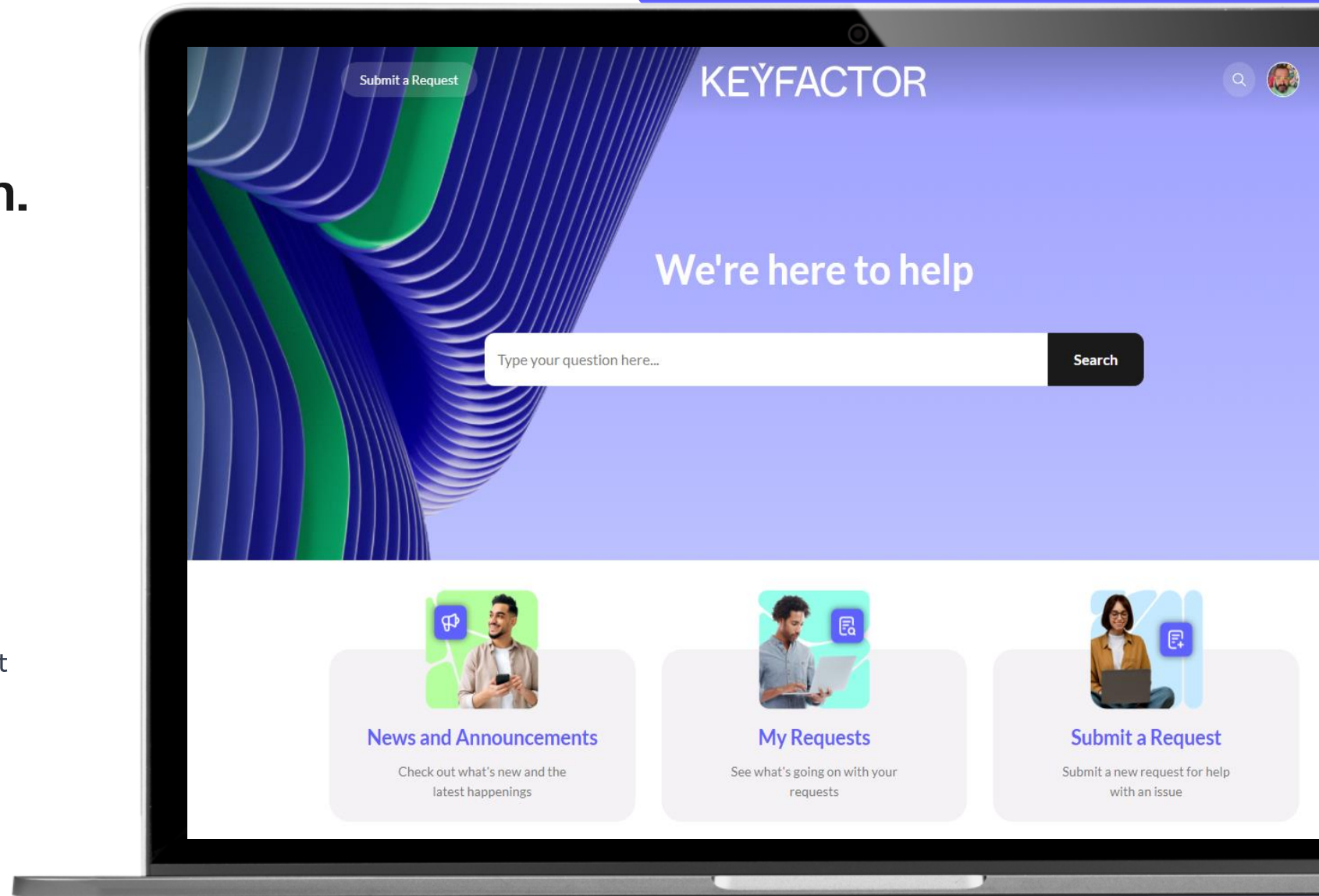
Let's get you logged in.

To access your account for the first time, just follow these simple steps:

1. Visit our support website at support.keyfactor.com
2. Log in as usual using your existing email address.
3. Select the 'Forgot Password' option and follow the on-screen instructions to reset your password.

****If you do not receive an email, please reach out to your customer success manager customersuccess@keyfactor.com**

That's all there is to it. We'll see you in there.



KEYFACTOR

SUBMIT A REQUEST

Dynamic submission. Intelligent routing.



Choose 'Submit a Request' from your portal home page.



Select your product from the dropdown.
The 'General' form is for all non-product requests.



Dynamic request forms gather all information up front, while suggesting self service articles.



Smart tagging will route your request to an available analyst with the right skillset.

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All the information you need without the clutter.



Choose 'My Requests' from your portal home page.



View/Manage all requests you have submitted, been flagged as a contributor on, or tagged to follow.



Clear and concise account information and conversation history with in-line attachments.



Drag and drop supporting documentation right into the conversation feed.

Frequently Asked Questions

How do I update my personal information?

From your profile icon go to:
Profile > Edit Profile

From here you can edit your name, personal photo, email, phone number and description.

How do I change my password?

From your profile icon go to:
Change Password

Reload your browser after a password reset and log in.

How do I escalate a request?

While submitting a request using 'Submit a Request' or updating an existing request using 'My Requests' let us know in the comments that you would like this escalated and provide the following:

- Steps to reproduce the issue
- Include all troubleshooting steps that have been taken so far
- Attach all supporting documentation to the request

When should I call support?

You should call support directly when submitting any Severity 1 request. This will ensure the quickest possible path to resolution.

How can I provide feedback?

We love hearing all feedback from our customers. within an hour of your case being closed you will receive an email where you can let us know how we have done. We encourage you to share any portal feedback here as well.

What is the meaning of life, the universe and everything?

Continued updates

