Revalize Customer Portal

User Guide—June 2024

Purpose

- This guide will provide basic guidance regarding the function of the Revalize Customer Portal.
- Portal functionality may change at any time, with or without notice.
- Revalize will strive to maintain the *User Guide* when any changes are made and cannot guarantee that the documentation will precede the deployment of new features or changes in functionality.
- New versions of this *User Guide* will be made available through the Revalize Customer Portal.

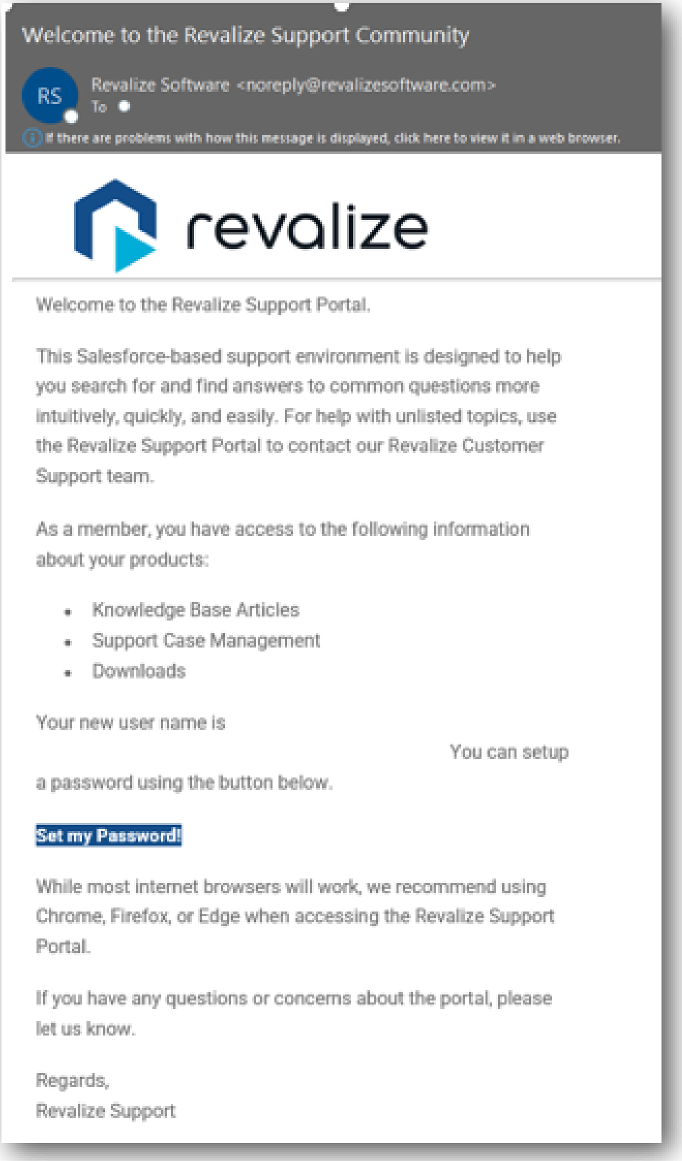
First Login

Welcome Email

- As a new user, you have received an email with a link that, when followed, allows the user to set a password for accessing the Revalize Customer Portal.

- *Note: the email will be sent from 'noreply@revalizesoftware.com' and might be in your Junk mail folder.*

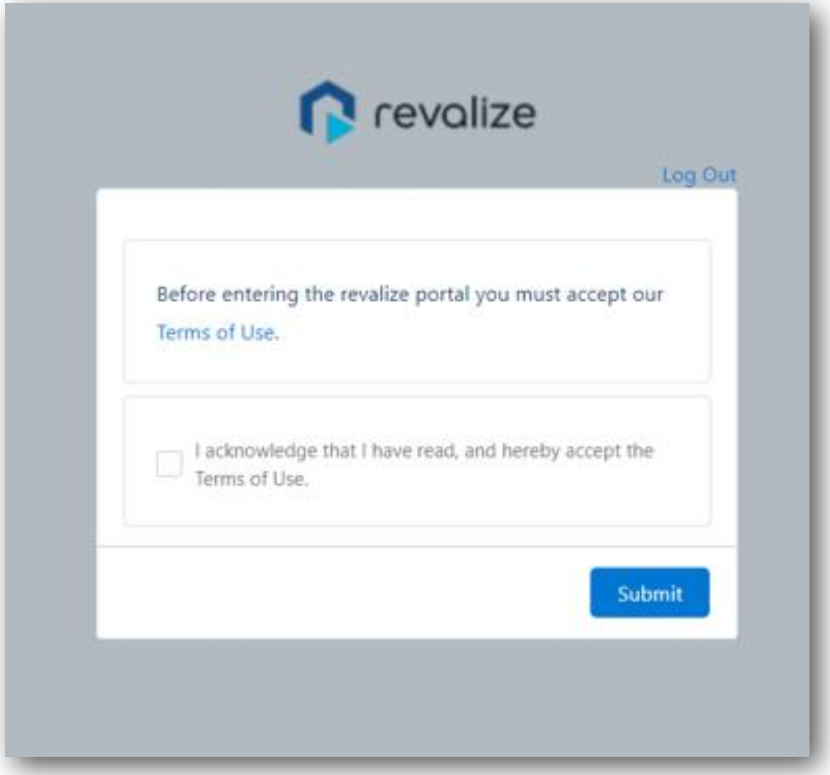
- Revalize encourages users to be good stewards of their personal login credentials and to establish a strong password which includes a combination of lowercase and uppercase letters, symbols, and numbers.



First Login

Terms of Use

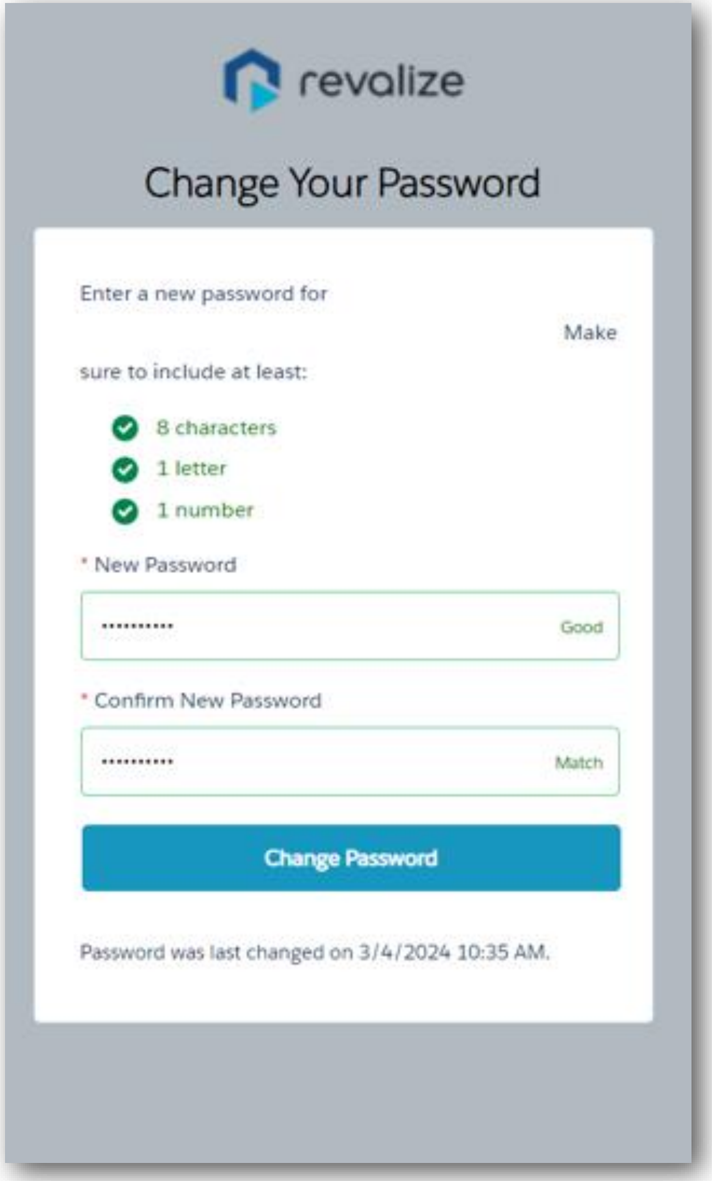
- New Users will be required to review and accept the Revalize *Terms of Use* before using the Portal.
- *Terms of Use* are available online: https://revalizesoftware.com/legal/support-portal-terms-of-use/
- Related, the *Revalize Privacy Policy* is available online, as are the mechanisms for exercising your legal rights under certain circumstances: https://revalizesoftware.com/legal/privacy/



First Login

Setting Your Password

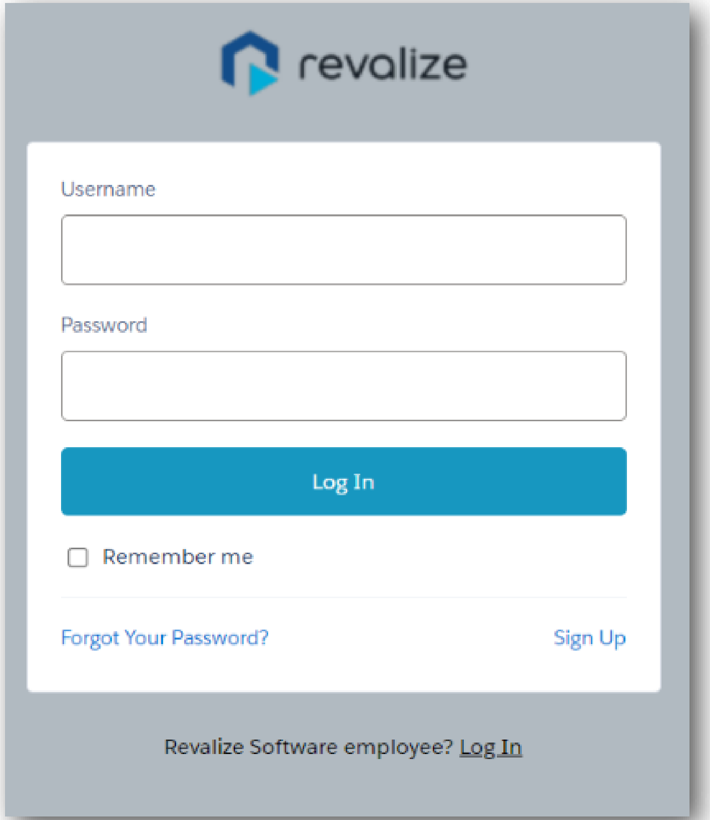
- Upon acceptance of the Terms of Use, the user will be prompted to set a password
- As noted, the password shall contain at least 8 characters, including at least one letter and one number



First Login

Login

- Upon establishing a password, the user may login to the Revalize Customer Portal.
- If the user forgets their password, there is a link from this page that allows the user to reset their password.



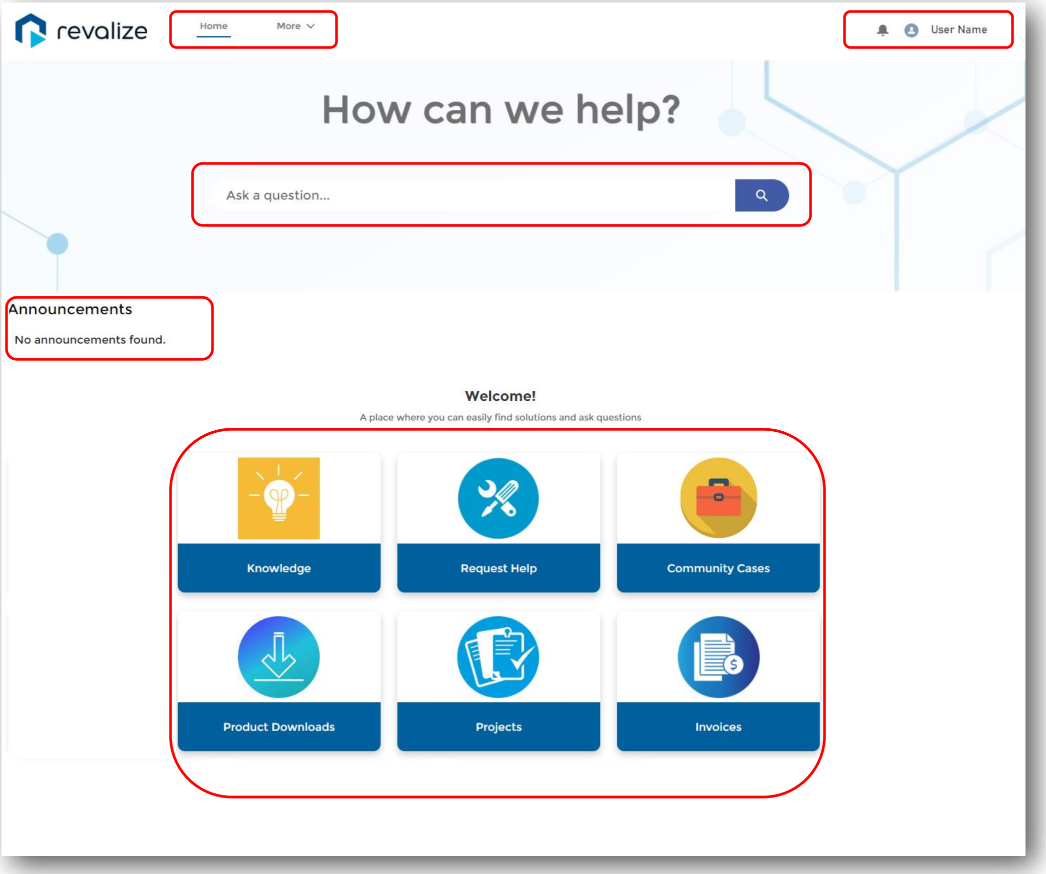
Revalize Customer Portal

Home Page

- From the **Home Page**, the user can conduct a broad search (*Ask a question*), may view *Announcements*, and may navigate to several areas of the portal.

- Navigation is performed by clicking on the large tiles in the center of the screen or by selecting an option from the *More* option in the header row.

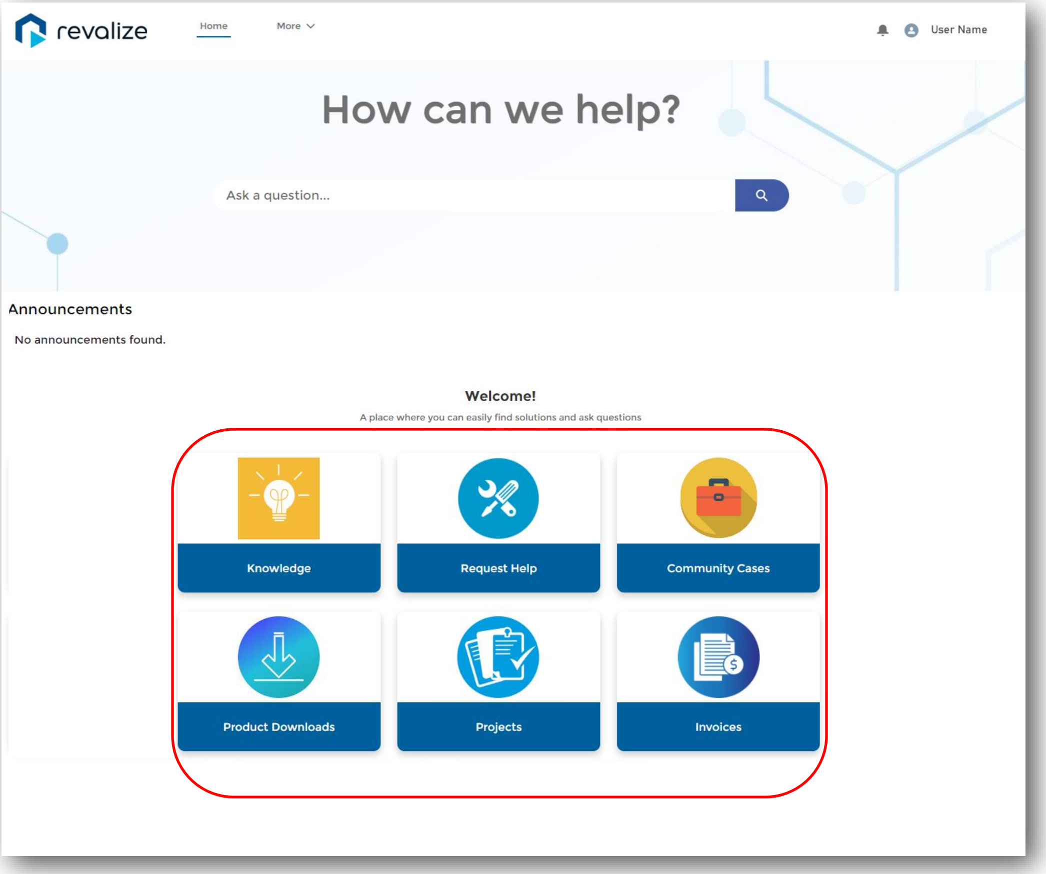
- Note: Some areas may not be visible to some users and your individual experience with the portal may differ from what is shown in the *User Guide*.



Revalize Customer Portal

Home Page

- The **Knowledge** tile or header link takes the user to the searchable knowledge base and documentation center
- To submit a request, user may click on the **Request Help** tile or select it from the header link.
- **Community Cases** allows the user to see previously submitted requests (also known as *Cases)*
- When applicable, **Product Downloads** provides a convenient location for users to download files related to their purchased software and licenses
- If the user has access to view information related to their implementation projects, they may click the **Projects** tile
- Similarly, if the user has access to view their invoices, they may click the **Invoices** tile.



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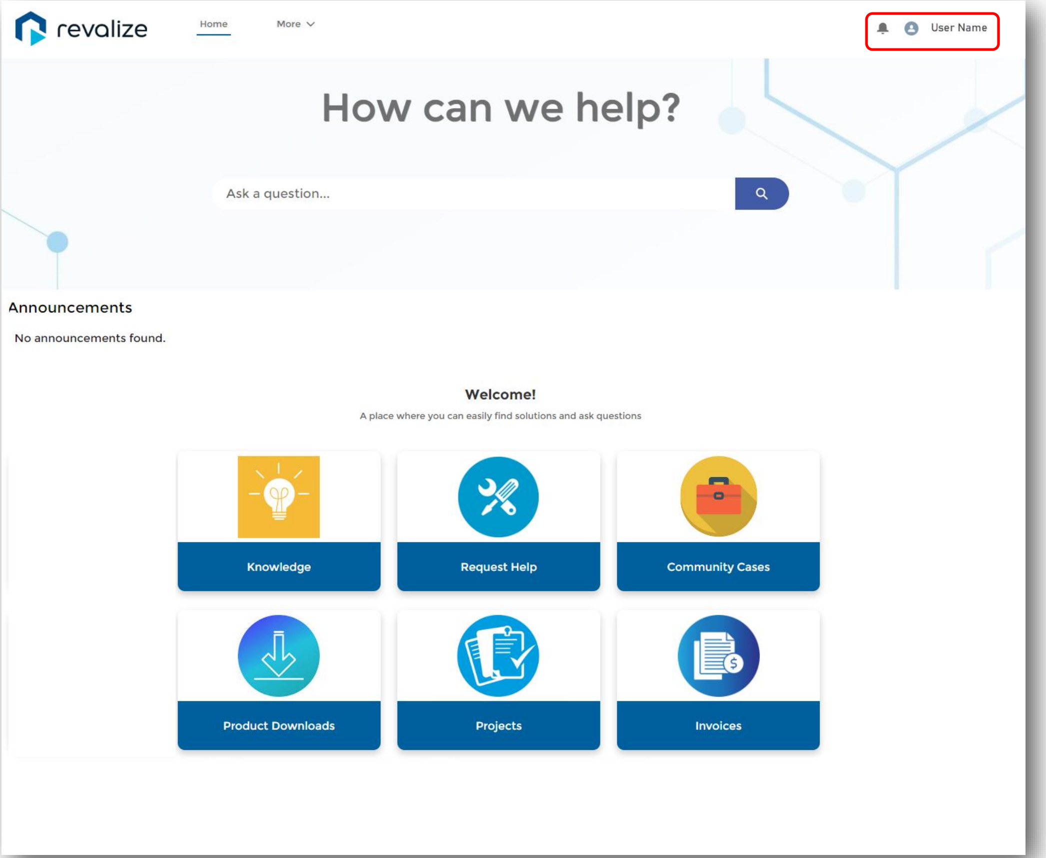
Home Page

- In the upper right corner of the screen are other important indicators and links
- The **Bell** icon will display a red dot to indicate that a notification has been received. The user merely needs to click the icon to open the notification.
- The user may find and update individual settings by clicking their name.
- **Settings** include their language preferences (English, German, Dutch, Polish, and Spanish are currently supported); Time Zone and Locale; and communication preferences.



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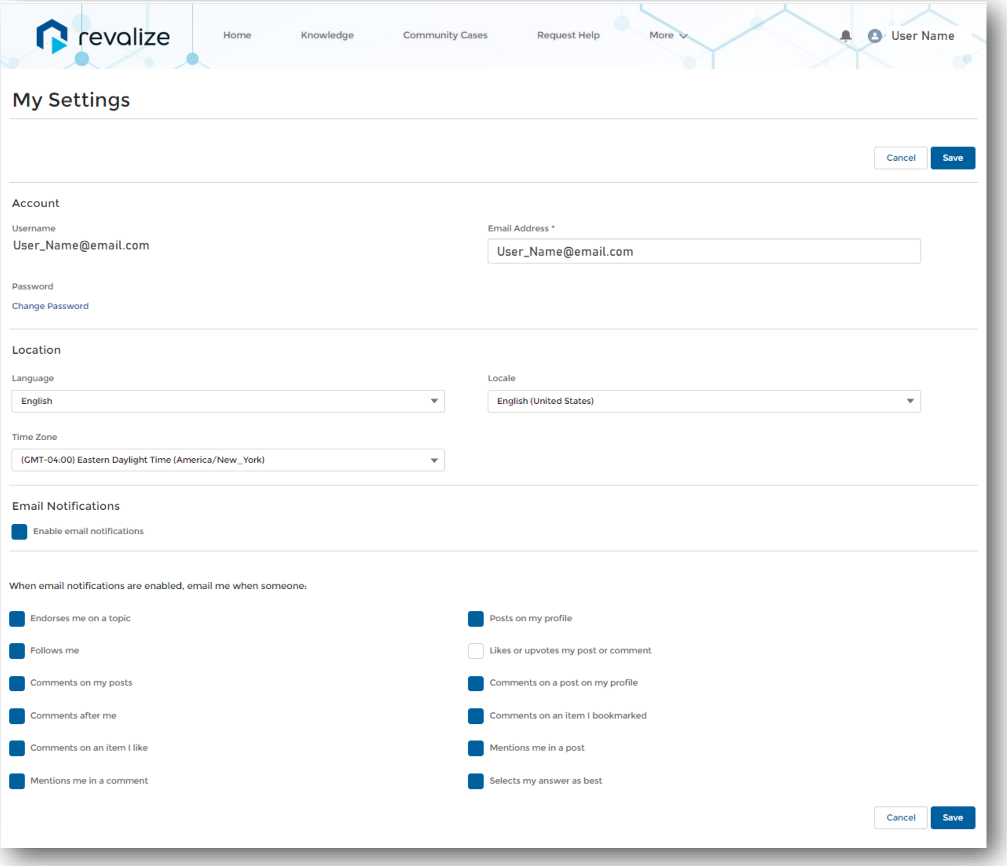
Settings

- To change the Settings for your portal experience, click your name in the upper right corner and select *Settings.*
- From this screen, the User may change their email address, their Language preference, their Locale, Time Zone, and their communication preferences
- A brief comment about communication preferences: Users who opt out of receiving emails or Chatter posts will not receive important communications regarding their requests (cases).



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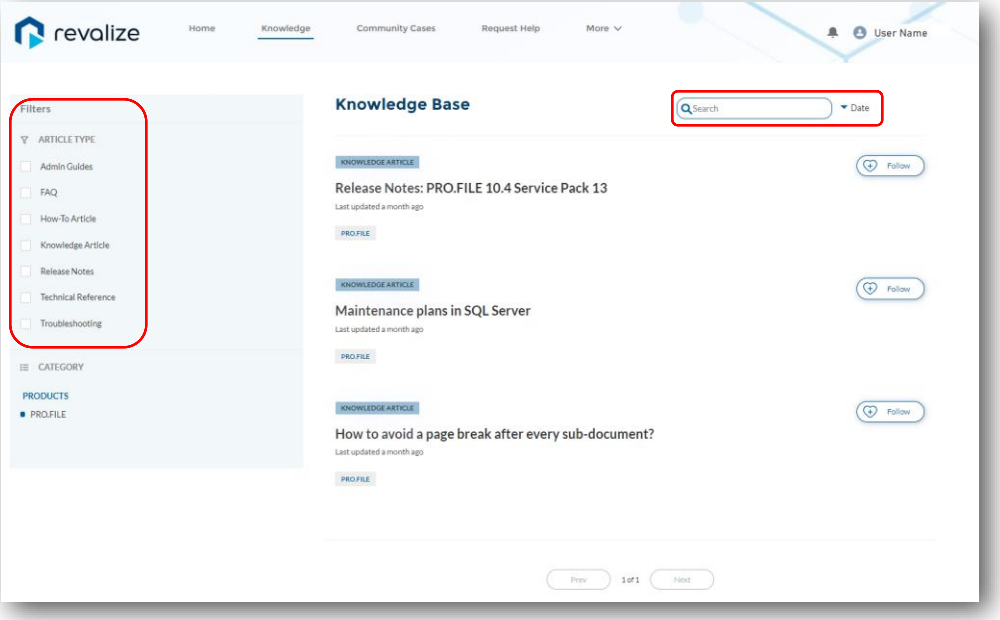
Knowledge

- Users with access to the Knowledge area of the portal will find multiple methods for searching for answers
- The **Search** field allows for specific keyword and phrase searches
- Users may narrow the search results by filtering by **Article Type**
- By default, users have access to knowledge articles and documentation based on their purchased products



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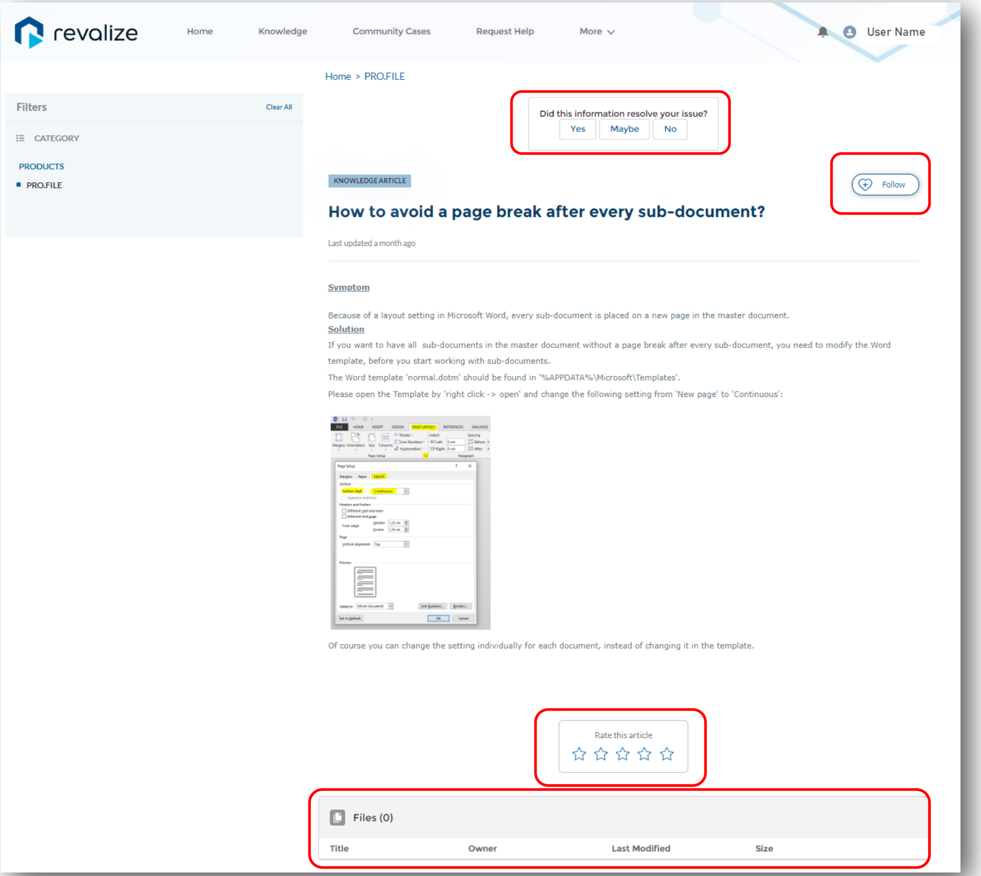
Knowledge

- Users may provide feedback regarding the effectiveness of the article by responding to the question at the top of the screen
- Users may follow the article and any subsequent changes to the article by clicking the **Follow** button
- Similarly, users may rate the quality of the article using the star ratings at the bottom of the screen
- Some articles may include downloadable attachments, and those are referenced at the bottom of the screen.



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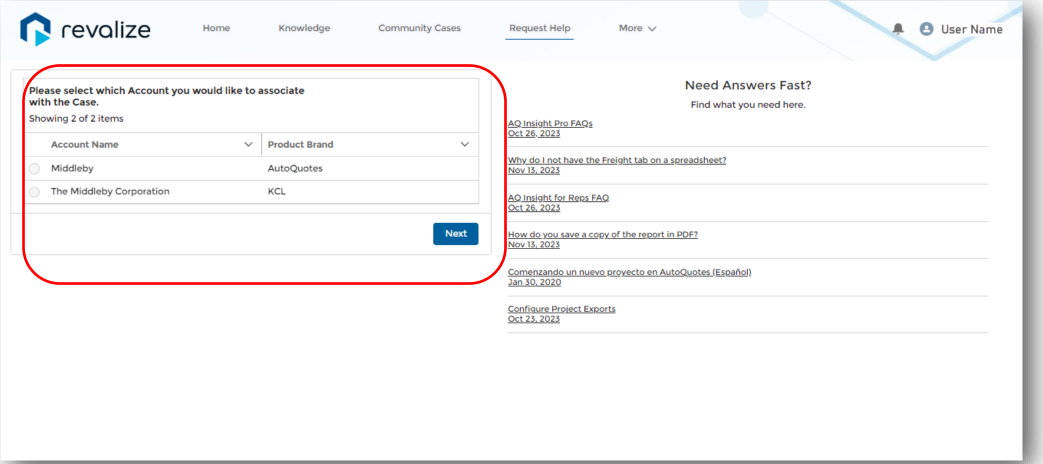
Request Help

- The **Request Help** tile allows user to request help from Revalize departments
- If the User is associated to multiple Accounts, they will be asked to select the appropriate Account to associate with the case
- If the user is associated with a single Account, this step will be skipped



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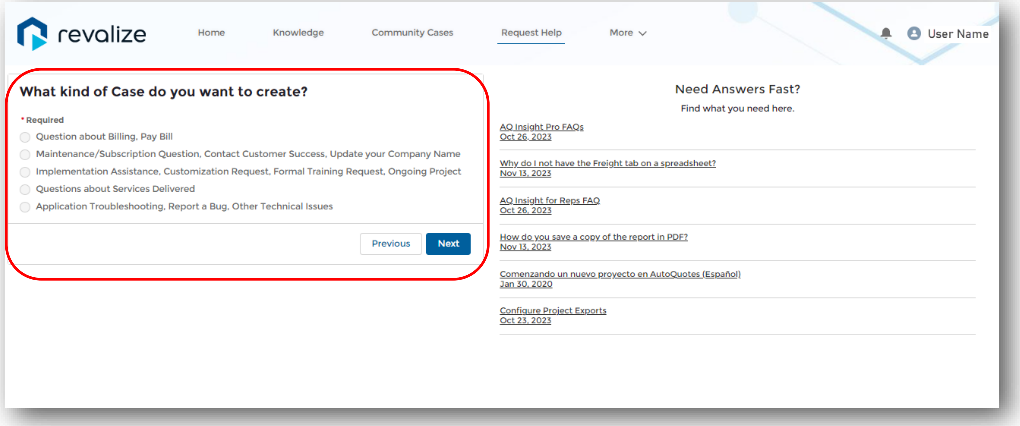
Request Help

- Several Revalize departments receive requests for help through the Portal. These are also known as ***Cases***.
- The user will select what type of assistance they are requesting and proceed to the next screen where they will provide details regarding the request
- The descriptions for the types of requests may change from time to time



Types of Requests

- ***Accounting:*** Question about Billing, Pay Bill
- ***Customer Success:*** Maintenance / Subscription Question, Contact Customer Success, Update your Company Name
- ***Professional Services:*** Implementation Assistance, Customization Request, Formal Training Request, Ongoing Project
- ***Professional Services:*** Questions about Services Delivered
- ***Customer Support:*** Application Troubleshooting, Report a Bug, Other Technical Issues

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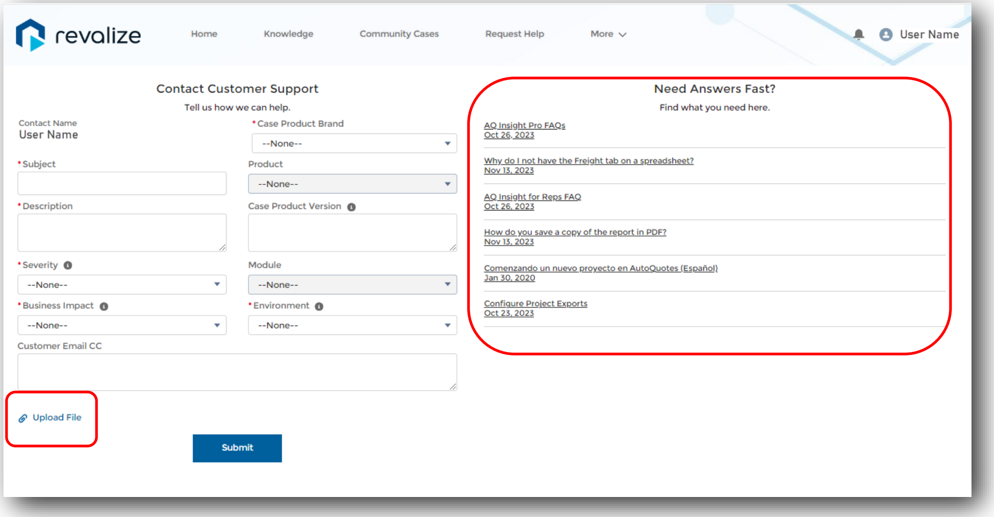
Request Help

- After selecting the type of request, click *Next* and enter the requested information
- Different request types may ask for different information during case creation
- All request types allow users to upload / attach files to the request
- The example shown is for **Customer Support**
- Notice the list of potential knowledge articles on the right side of the screen. This list will change based on the words entered in the *Subject* and *Description* fields.



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Severity and Priority Level Definitions

Low (S4)

- **Severity:** Used to indicate something at the customer site that does not impact their current workflow processes. A minor problem or question about a product.

- **Priority:** Minor or cosmetic issues, questions that do not affect product functionality, such as How-To's, documentation, and general questions.

Moderate (S3)

- **Severity:** Used to indicate an issue of moderate importance to the customer. A work-around is available and may be sufficient for a limited time.

- **Priority:** Moderate loss of functionality or performance, resulting in multiple users impacted in their normal function but the application remains usable. Minor feature or product failure.

High (S2)

- **Severity:** Used to indicate this is of high importance to the customer. A work-around may be available, but the resolution is not optimal.

- **Priority:** Solution is usable, but severely limited. Critical loss of application functionality or performance, resulting in most users unable to perform their normal functions. These are business critical issues.

Critical (S1)

- **Severity:** Used to indicate an issue of critical importance for the customer. No workaround immediately available.

- **Priority:** Solution is non-operational, and users cannot access the system. Issue affects mission-critical functions or information and may include data loss or integrity.
- ***Only applies to production systems.***

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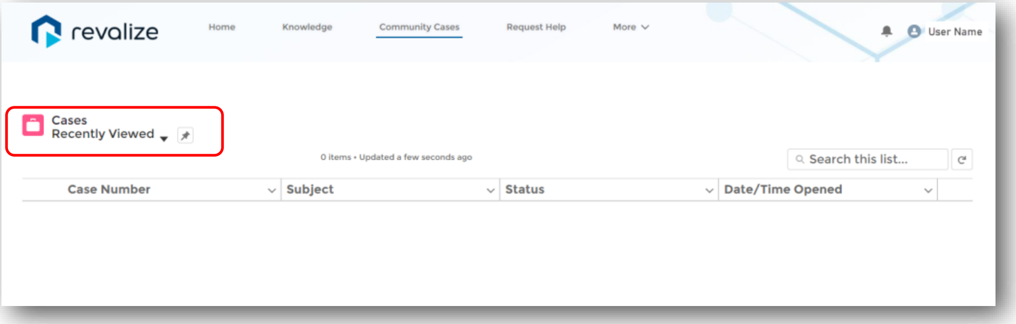
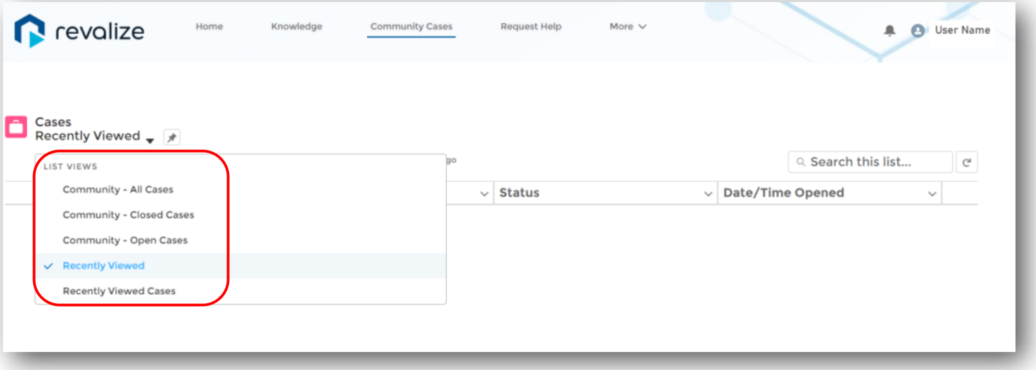
Community Cases

- After submitting the Request (Case), the User may find it and other previously submitted cases on the **Community Cases** page

- Standard views of cases include *Community – All Cases; Community – Closed Cases; Community – Open Cases;* and *Recently Viewed Cases*

- Users may select the appropriate view from the drop-down menu





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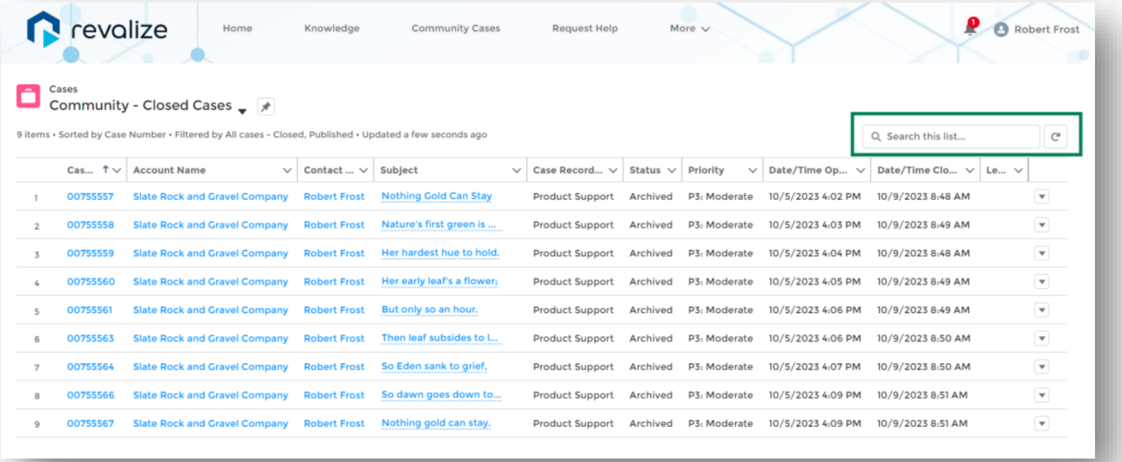
Community Cases

- In the example shown, the list view provides a list of the cases
- Users may search within the list of cases using the search field
- The cases may be clicked to show the details



	Cas...	Account Name	Contact ...	Subject	Case Record...	Status	Priority	Date/Time Op...	Date/Time Clo...	Le...
1	00755557	Slate Rock and Gravel Company	Robert Frost	Nothing Gold Can Stay	Product Support	Archived	P3: Moderate	10/5/2023 4:02 PM	10/9/2023 8:48 AM	
2	00755558	Slate Rock and Gravel Company	Robert Frost	Nature's first green is ...	Product Support	Archived	P3: Moderate	10/5/2023 4:03 PM	10/9/2023 8:49 AM	
3	00755559	Slate Rock and Gravel Company	Robert Frost	Her hardest hue to hold.	Product Support	Archived	P3: Moderate	10/5/2023 4:04 PM	10/9/2023 8:48 AM	
4	00755560	Slate Rock and Gravel Company	Robert Frost	Her early leaf's a flower;	Product Support	Archived	P3: Moderate	10/5/2023 4:05 PM	10/9/2023 8:49 AM	
5	00755561	Slate Rock and Gravel Company	Robert Frost	But only so an hour.	Product Support	Archived	P3: Moderate	10/5/2023 4:06 PM	10/9/2023 8:49 AM	
6	00755563	Slate Rock and Gravel Company	Robert Frost	Then leaf subsides to l...	Product Support	Archived	P3: Moderate	10/5/2023 4:06 PM	10/9/2023 8:50 AM	
7	00755564	Slate Rock and Gravel Company	Robert Frost	So Eden sank to grief,	Product Support	Archived	P3: Moderate	10/5/2023 4:07 PM	10/9/2023 8:50 AM	
8	00755566	Slate Rock and Gravel Company	Robert Frost	So dawn goes down to...	Product Support	Archived	P3: Moderate	10/5/2023 4:09 PM	10/9/2023 8:51 AM	
9	00755567	Slate Rock and Gravel Company	Robert Frost	Nothing gold can stay.	Product Support	Archived	P3: Moderate	10/5/2023 4:09 PM	10/9/2023 8:51 AM	

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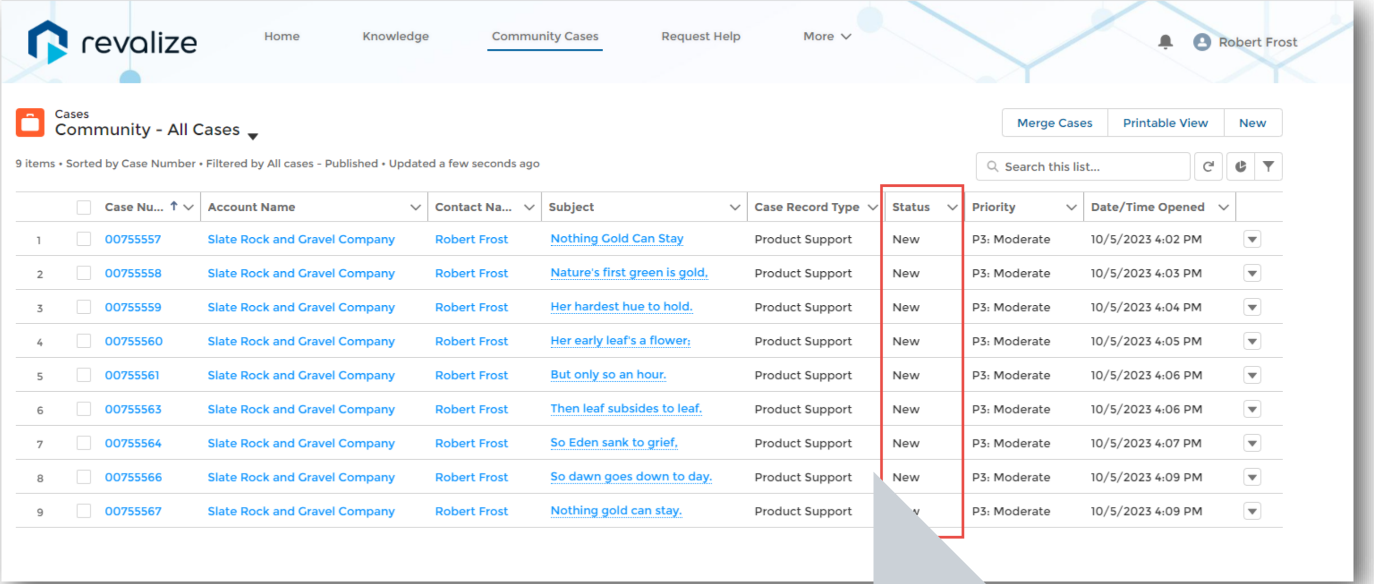
Case Status

- ***Status*** indicates the current disposition of a Case
- The most common Case Statuses are shown below
- A Case's lifecycle is not linear; the Status will skip around as an issue is worked



	Case Nu...	Account Name	Contact Na...	Subject	Case Record Type	Status	Priority	Date/Time Opened
1	00755557	Slate Rock and Gravel Company	Robert Frost	Nothing Gold Can Stay	Product Support	New	P3: Moderate	10/5/2023 4:02 PM
2	00755558	Slate Rock and Gravel Company	Robert Frost	Nature's first green is gold.	Product Support	New	P3: Moderate	10/5/2023 4:03 PM
3	00755559	Slate Rock and Gravel Company	Robert Frost	Her hardest hue to hold.	Product Support	New	P3: Moderate	10/5/2023 4:04 PM
4	00755560	Slate Rock and Gravel Company	Robert Frost	Her early leaf's a flower;	Product Support	New	P3: Moderate	10/5/2023 4:05 PM
5	00755561	Slate Rock and Gravel Company	Robert Frost	But only so an hour.	Product Support	New	P3: Moderate	10/5/2023 4:06 PM
6	00755563	Slate Rock and Gravel Company	Robert Frost	Then leaf subsides to leaf.	Product Support	New	P3: Moderate	10/5/2023 4:06 PM
7	00755564	Slate Rock and Gravel Company	Robert Frost	So Eden sank to grief,	Product Support	New	P3: Moderate	10/5/2023 4:07 PM
8	00755566	Slate Rock and Gravel Company	Robert Frost	So dawn goes down to day.	Product Support	New	P3: Moderate	10/5/2023 4:09 PM
9	00755567	Slate Rock and Gravel Company	Robert Frost	Nothing gold can stay.	Product Support	[illegible]	P3: Moderate	10/5/2023 4:09 PM

New
- The Case is New and no action has been taken. The Case is assigned to a queue for Case Owner assignment.

Assigned
- The Case has been assigned to a Case Owner.

In Progress
- The Case Owner is reviewing the Case details and may seek additional information.

Pending Customer Response
- Additional information has been requested by the Case Owner and the Case is pending the Customer's response.

Resolution Delivered, Confirmation Pending
- A resolution to the issue has been delivered.

Resolution Feedback Received
- Feedback has been received following a Case resolution.

Closed
- The Case is closed but can be reopened, if needed.

Archived
- The Case is closed and cannot be reopened. If an issue reoccurs after a Case has been Archived, a new Case can be created.

Revalize Customer Portal

Case Status (cont.)

From time to time, Cases Statuses will be used to communicate other stages of the Case lifecycle

Transferred to 3rd Level Support	The case has been referred to 3rd level support for investigation and/or action.
Enhancement Request	The case resulted in an enhancement request, which has been forwarded to the Product team.
Associated with Defect	A defect has been discovered and reported to the Product team.
Pending Services Agreement	The customer needs to establish a Services Agreement with Professional Services for billable activities
Pending Product Release	The case has been reviewed and a critical bug has been identified, which requires a hotfix for resolution.
Transfer to New Agent	The original case owner is unavailable, and the case will be reassigned.
Service Hold	The customer’s subscription has not been renewed.

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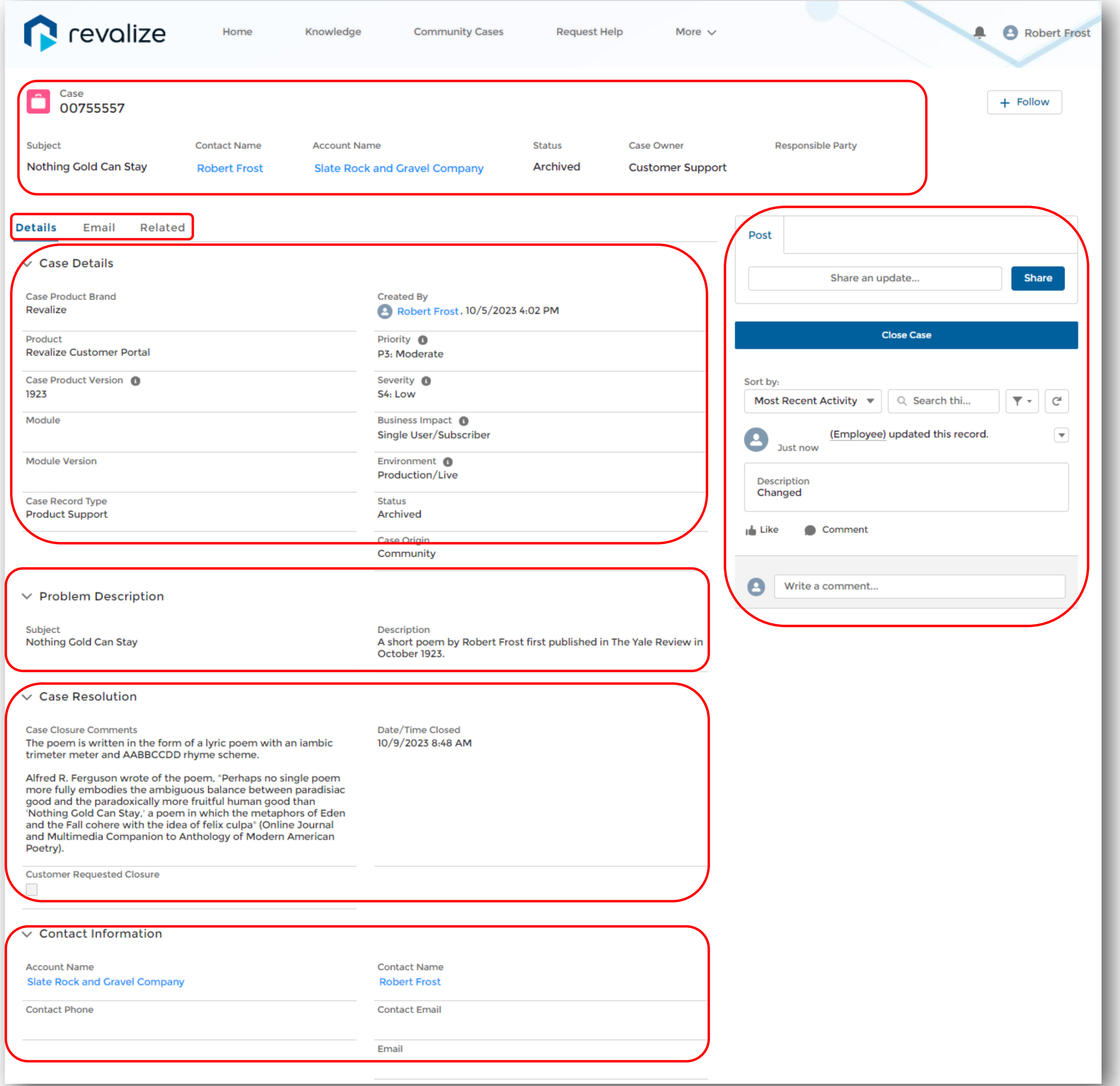
Community Cases

- General information is shown in the header section, including the case *Status* and *Case Owner*
- Note the three tabs: *Details, Email, Related*
- ***Details***
  - *Case Details*
  - *Problem Description*
  - *Case Resolution*
  - *Contact Information*
- ***Email*** includes all emails related to the Case
- ***Related*** includes case attachments and referenced articles
- The *Post* section allows real-time two-way communication between the User and the assigned *Case Owner*



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Community Cases

- Users may proactively close cases by clicking the button to *Close Case*

- When the resolution to a case is delivered, the case Status will be *Resolution Delivered, Confirmation Pending.* Any response to a case in this status will cause the case status to change to *Resolution Feedback Received*

- Cases that have been closed for less than ten (10) days may be reopened if the resolution was not sufficient

- Cases in an *Archived* status indicate they have been closed for more than 10 days; therefore, the original case may not be re-opened and a new case is required. If necessary to submit a case related to an archived case, please mention the archived case number in the new case description

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Feedback

- Upon closure of a Customer Support case, an email will be sent to the Contact associated with the case asking for feedback

  - How satisfied were you by the agent? (1-5, 5 best)
  - How satisfied were you by the response time? (1-5, 5 best)
  - How satisfied were you with the solution that was provided? (1-5, 5 best)
  - Any feedback you wish to share about your experience? (Text)
  - Would you like to be contacted regarding this case? (Y/N)

- Responding to the survey is optional, and the feedback is very valuable to help Revalize improve

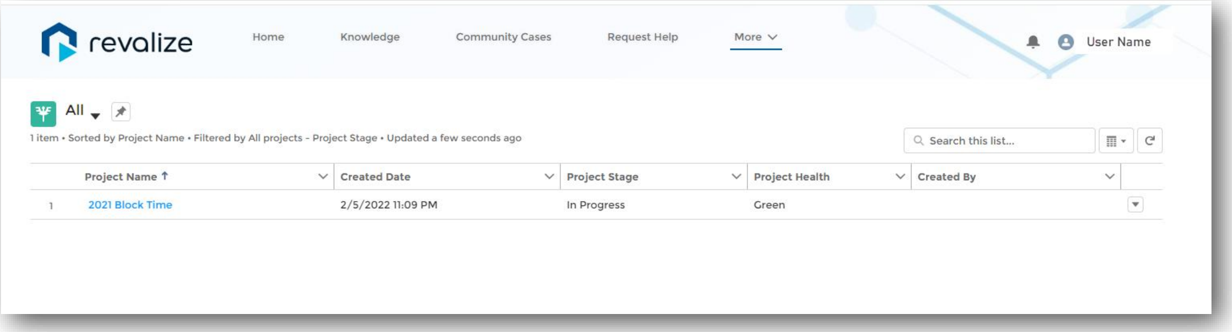
Revalize Customer Portal

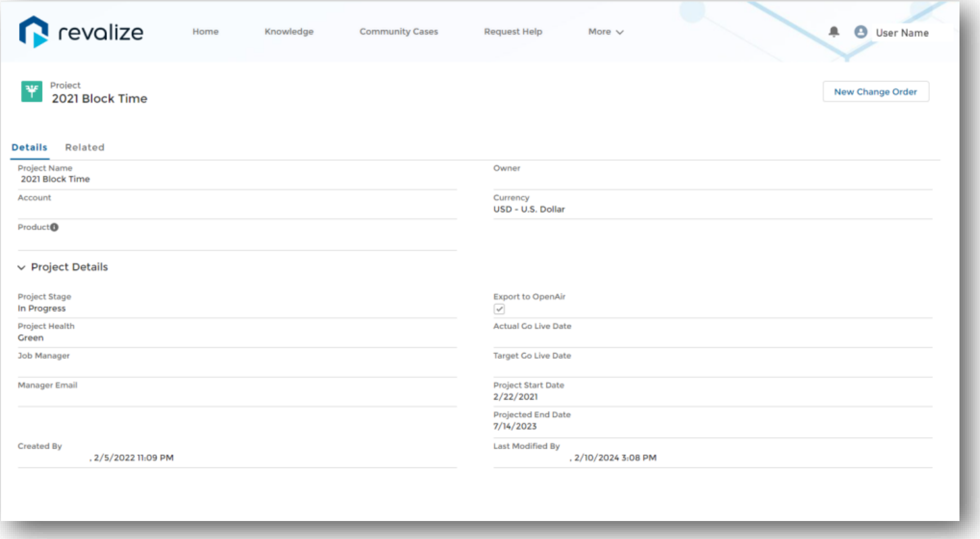
Projects

- Users who have access to view their implementation projects may see general project information

- The User may see the project status and health along with the project dates

- The *Related* tab provides visibility of the Project History as well as any attached files, such as project documentation





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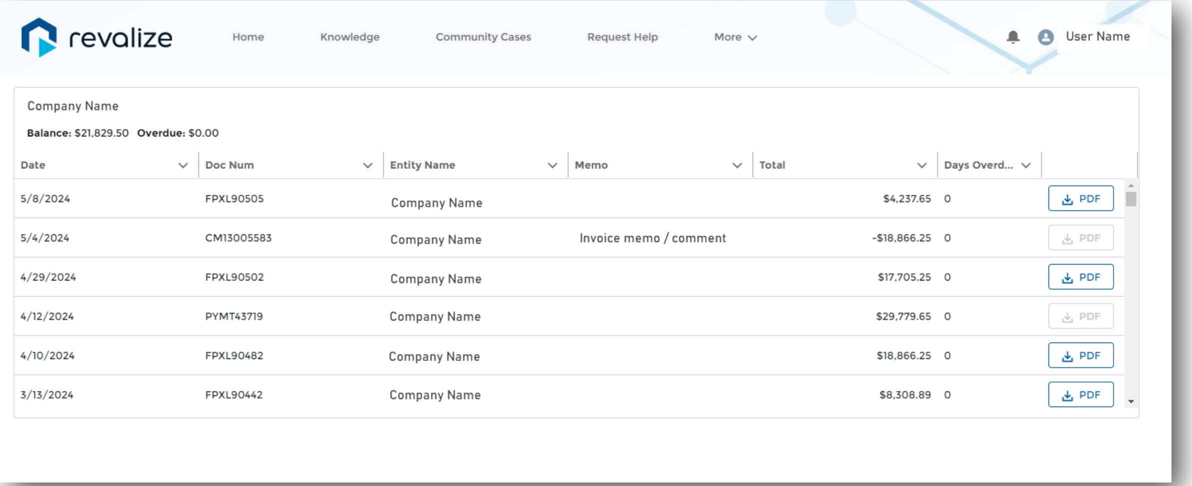
Invoices

- Users who have access to view their company's invoices may view summary information on the screen and download detailed invoices in PDF format

- Access requires authorization by a company administrator



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Thank you