



# Revalize Customer Portal

User Guide—June 2024

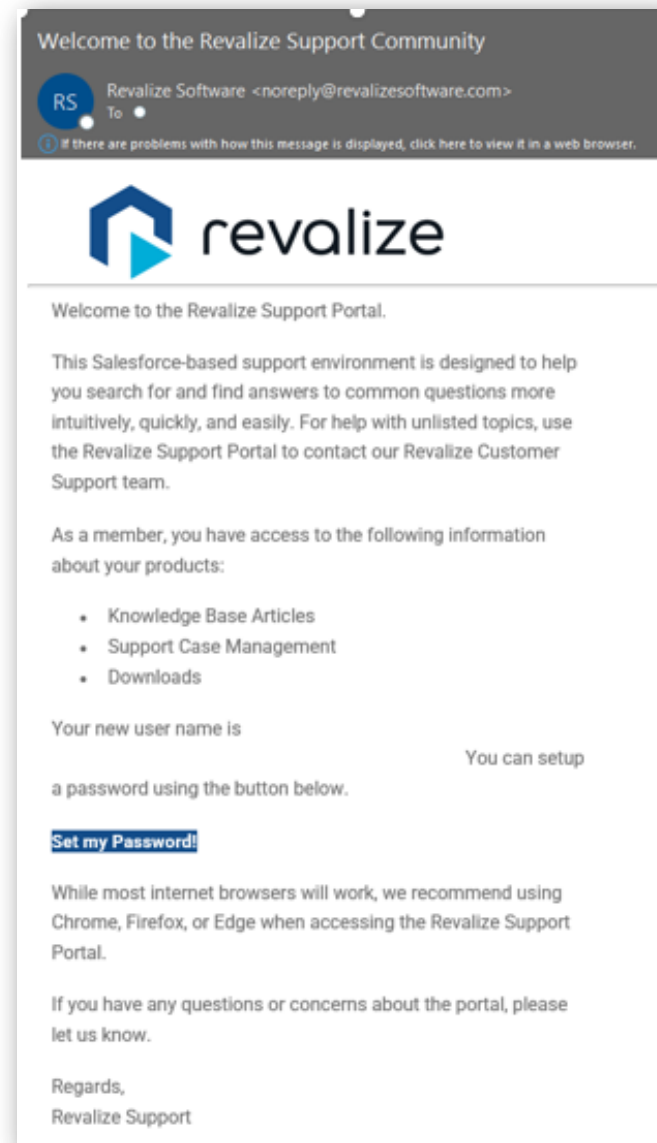
# Purpose

- 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

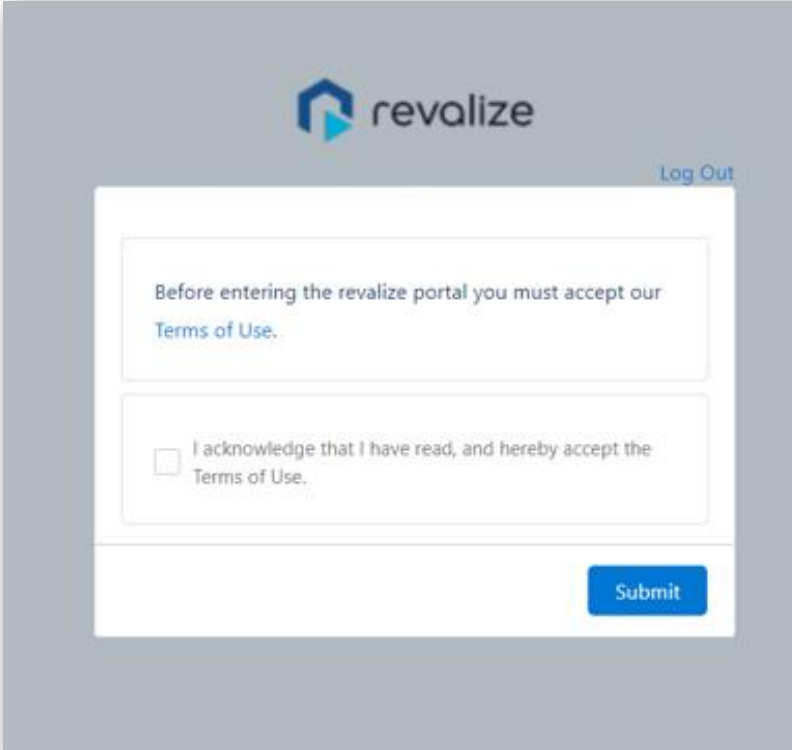
- As a new user, you have received an email with a link that, when followed, allows the user to set a password for accessing the Revalize Customer Portal.
- *Note: the email will be sent from 'noreply@revalizesoftware.com' and might be in your Junk mail folder.*
- Revalize encourages users to be good 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/>

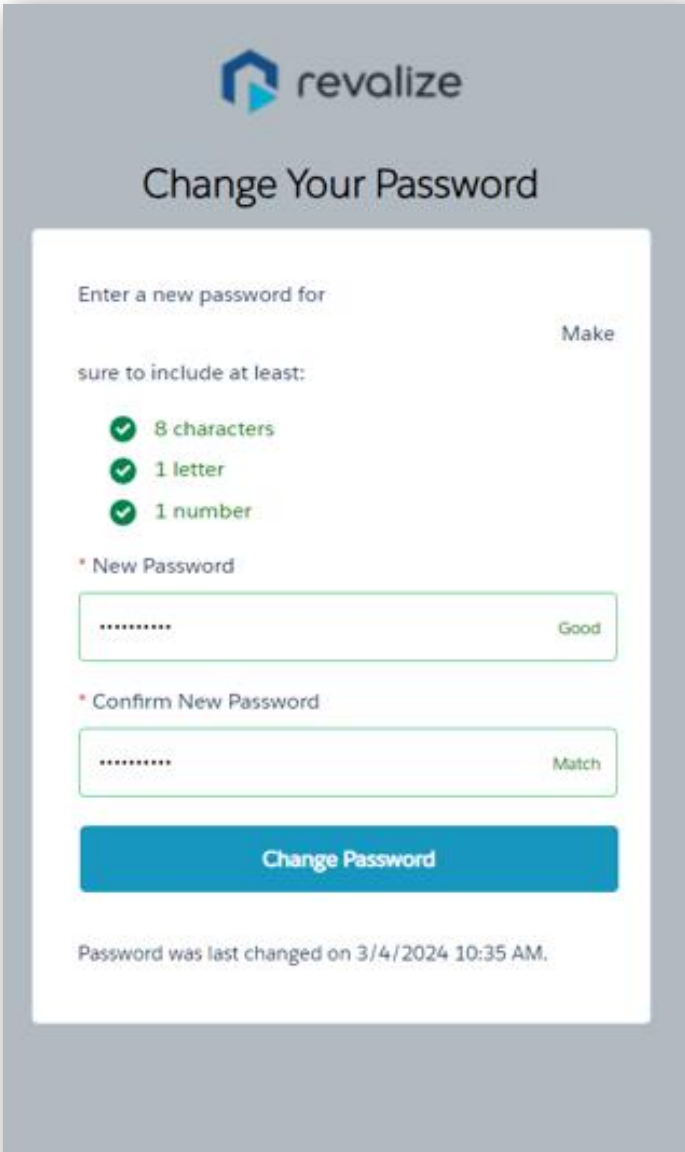


The screenshot shows a web interface for Revalize. At the top left is the Revalize logo, consisting of a blue house-like icon followed by the word "revalize". In the top right corner, there is a "Log Out" link. The main content area is a white box with a light gray border. Inside this box, there is a message: "Before entering the revalize portal you must accept our Terms of Use." Below this message is a checkbox followed by the text "I acknowledge that I have read, and hereby accept the Terms of Use." At the bottom right of the white box is a blue "Submit" button.

# 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



revalize

### Change Your Password

Enter a new password for Make

sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

\* New Password Good

\* Confirm New Password Match

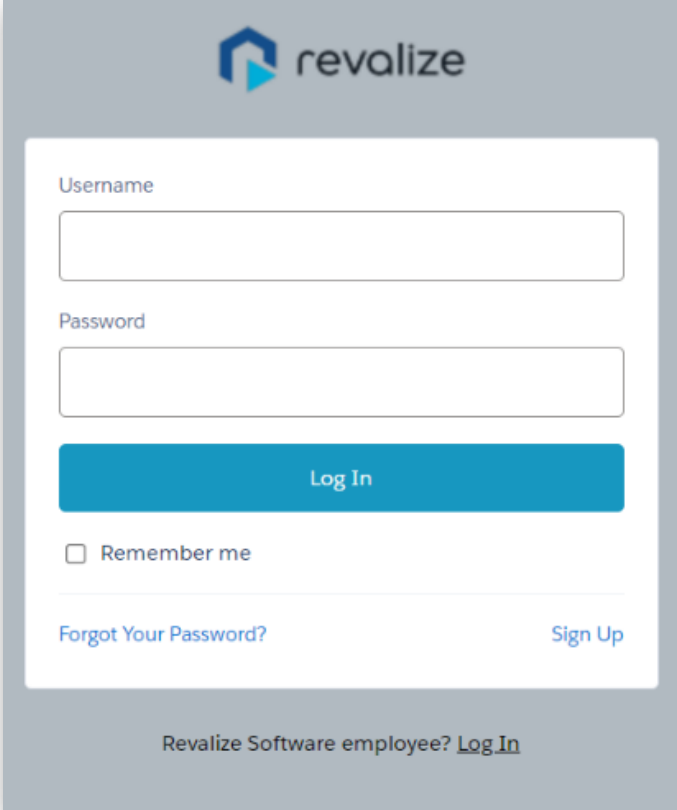
**Change Password**

Password was last changed on 3/4/2024 10:35 AM.

# 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.

A screenshot of the Revalize login form. The form is centered on a light gray background. At the top, the Revalize logo (a blue house-like icon) and the word "revalize" are displayed. Below the logo, there are two input fields: "Username" and "Password". The "Username" field is a simple white box with a thin gray border. The "Password" field is a white box with a thin gray border and a small eye icon on the right side to toggle visibility. Below the password field is a blue button with the text "Log In" in white. Underneath the button is a checkbox labeled "Remember me". At the bottom of the form, there are two links: "Forgot Your Password?" on the left and "Sign Up" on the right. Below the form, there is a link for "Revalize Software employee? Log In".

revalize

Username

Password

Log In

Remember me

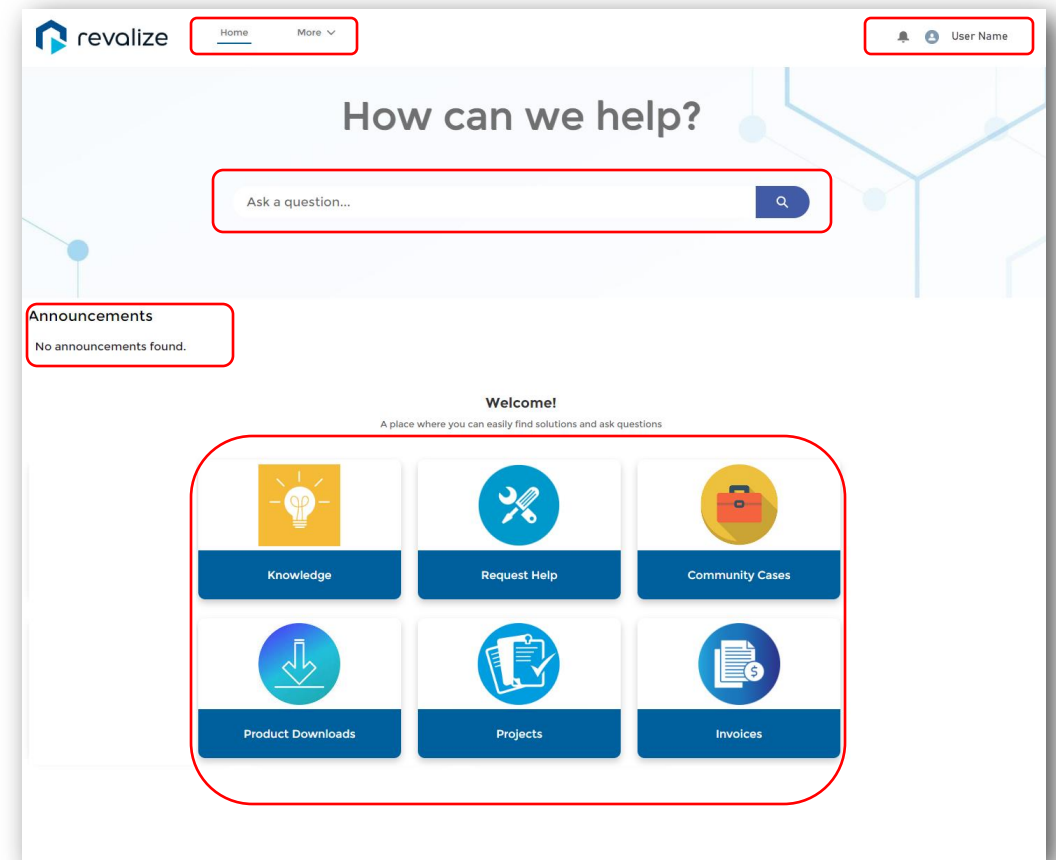
[Forgot Your Password?](#) [Sign Up](#)

Revalize Software employee? [Log In](#)

# Revalize Customer Portal

## Home Page

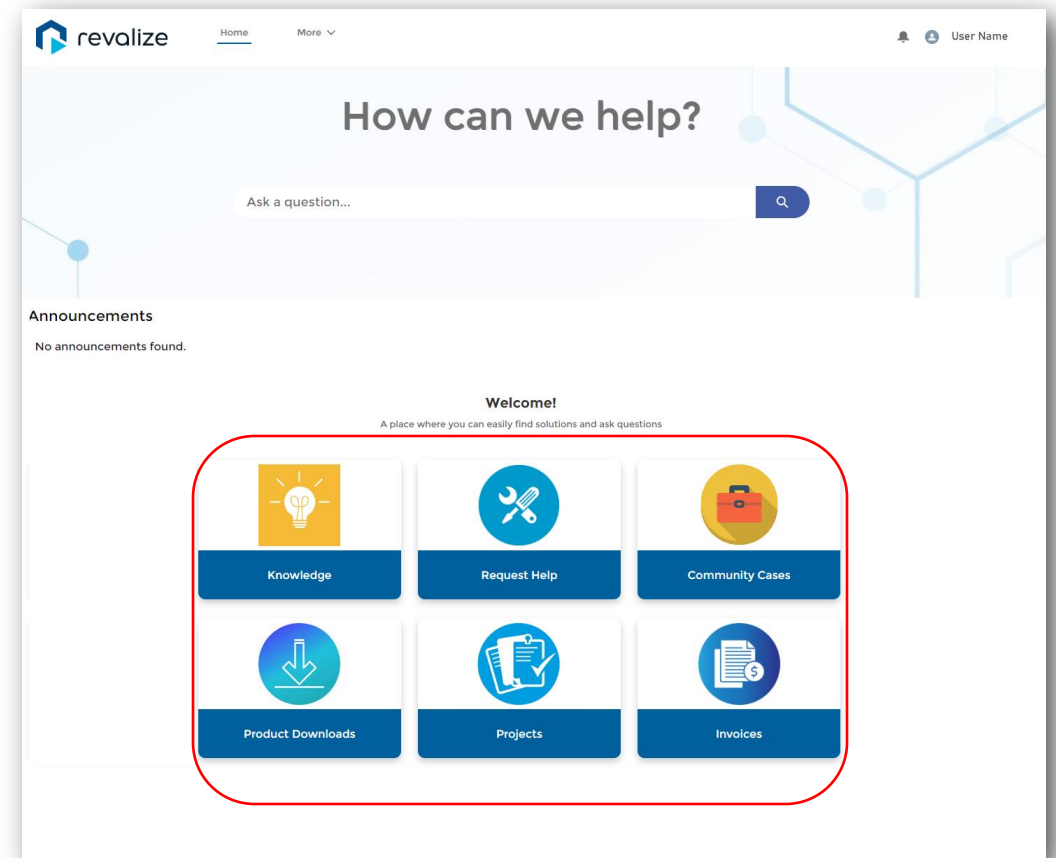
- From the **Home Page**, the user can conduct a broad search (*Ask a question*), may view *Announcements*, and may navigate to several areas of the portal.
- Navigation is performed by clicking on the large tiles in the center of the screen or by selecting an option from the *More* option in the header 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.

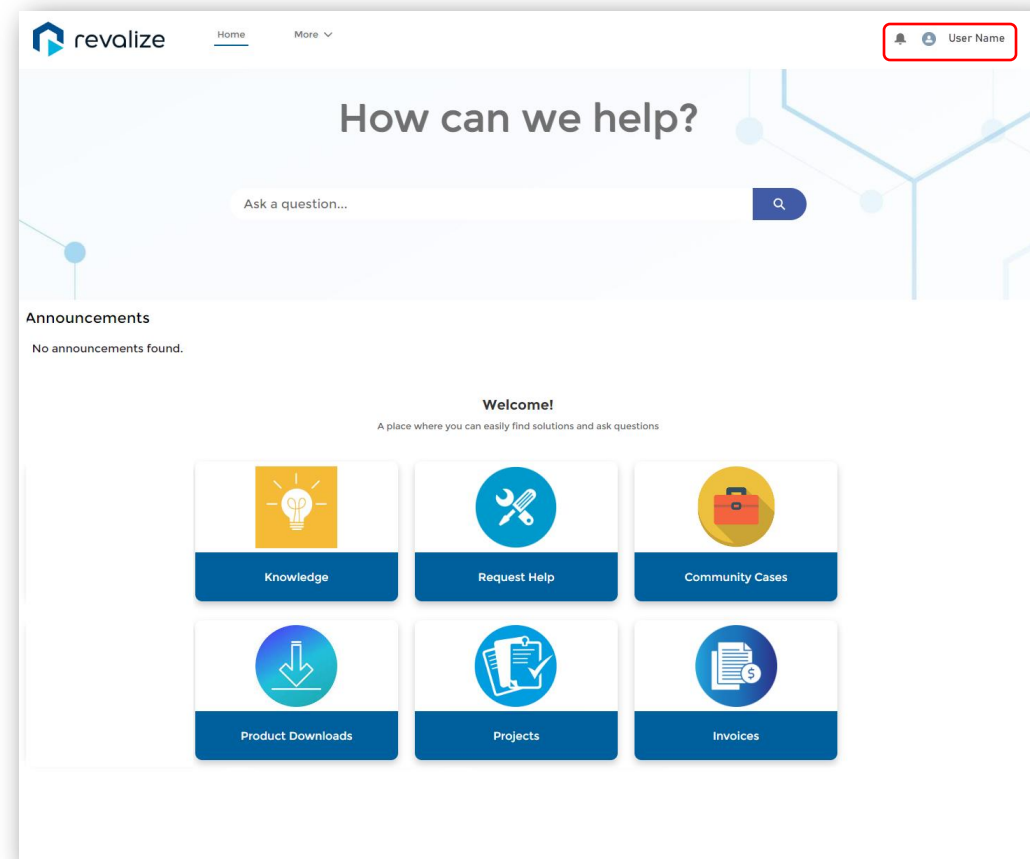




# Revalize Customer Portal

## 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.



# Revalize Customer Portal

## 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).

The screenshot shows the 'My Settings' page in the Revalize Customer Portal. The page is divided into several sections:

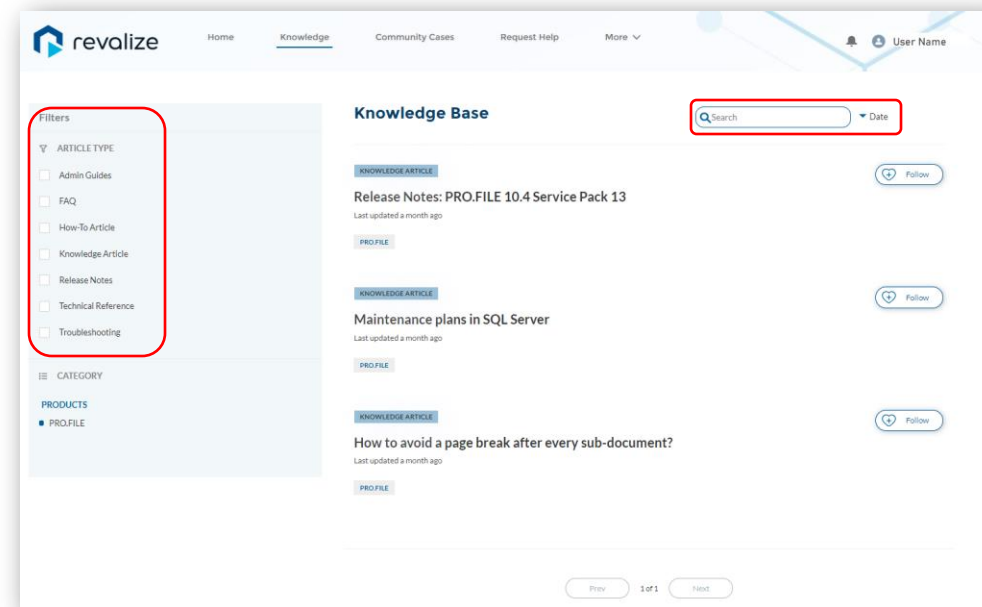
- Account:** Includes fields for Username (User\_Name@email.com) and Email Address (User\_Name@email.com). There is a 'Change Password' link and a 'Password' field.
- Location:** Includes dropdown menus for Language (English), Locale (English (United States)), and Time Zone ((GMT-04:00) Eastern Daylight Time (America/New\_York)).
- Email Notifications:** Includes a checkbox for 'Enable email notifications' which is checked.
- When email notifications are enabled, email me when someone:** A list of notification preferences with checkboxes:
  - Endorses me on a topic (checked)
  - Follows me (checked)
  - Comments on my posts (checked)
  - Comments after me (checked)
  - Comments on an item I like (checked)
  - Mentions me in a comment (checked)
  - Posts on my profile (checked)
  - Likes or upvotes my post or comment (unchecked)
  - Comments on a post on my profile (checked)
  - Comments on an item I bookmarked (checked)
  - Mentions me in a post (checked)
  - Selects my answer as best (checked)

Buttons for 'Cancel' and 'Save' are located at the top right and bottom right of the settings area.

# Revalize Customer Portal

## 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



# Revalize Customer Portal

## 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.

revalize Home Knowledge Community Cases Request Help More User Name

Home > PROFILE

Filters Clear All

CATEGORY

PRODUCTS

PROFILE

Did this information resolve your issue?  
Yes Maybe No

KNOWLEDGEARTICLE

Follow

### How to avoid a page break after every sub-document?

Last updated a month ago

**Symptom**

**Solution**

Because of a layout setting in Microsoft Word, every sub-document is placed on a new page in the master document.

If you want to have all sub-documents in the master document without a page break after every sub-document, you need to modify the Word template, before you start working with sub-documents.

The Word template 'normal.dotm' should be found in '%APPDATA%\Microsoft\Templates'.

Please open the Template by 'right click -> open' and change the following setting from 'New page' to 'Continuous':

Of course you can change the setting individually for each document, instead of changing it in the template.

Rate this article  
☆☆☆☆☆

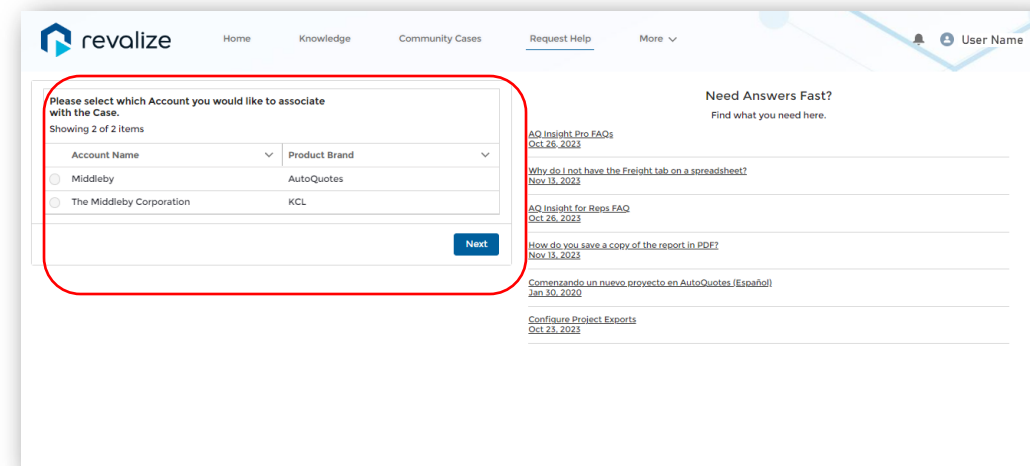
Files (0)

Title	Owner	Last Modified	Size
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# Revalize Customer Portal

## Request Help

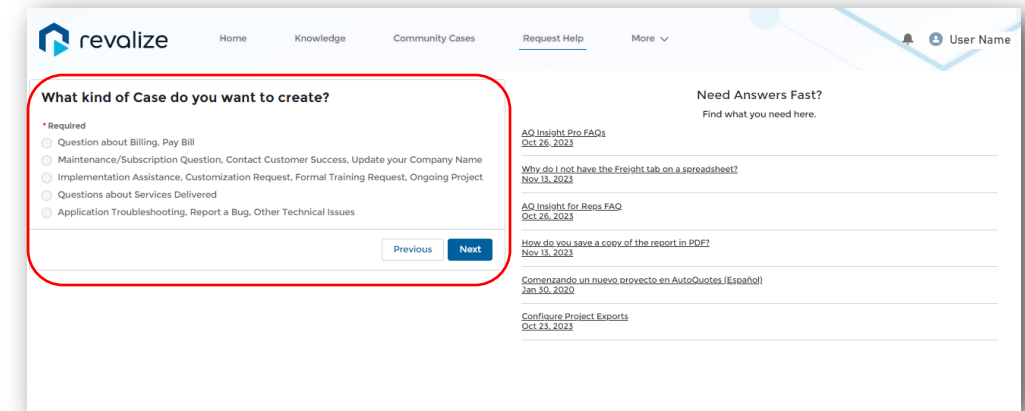
- The **Request Help** tile allows user to request help from Revalize departments
- If the User is associated to multiple Accounts, they will be asked to select the appropriate Account to associate with the case
- If the user is associated with a single Account, this step will be skipped



# Revalize Customer Portal

## 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

# Revalize Customer Portal

## 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.

The screenshot shows the 'Request Help' form in the Revalize Customer Portal. The form is titled 'Contact Customer Support' and includes the following fields:

- Contact Name
- User Name
- Subject
- Description
- Severity
- Business Impact
- Case Product Brand
- Product
- Case Product Version
- Module
- Environment
- Customer Email CC

There is an 'Upload File' button and a 'Submit' button. On the right side, there is a section titled 'Need Answers Fast?' with a list of knowledge articles. A red box highlights the 'Upload File' button, and another red box highlights the 'Need Answers Fast?' section.

# Revalize Customer Portal

## 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.

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- **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.

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- **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.

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- **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.

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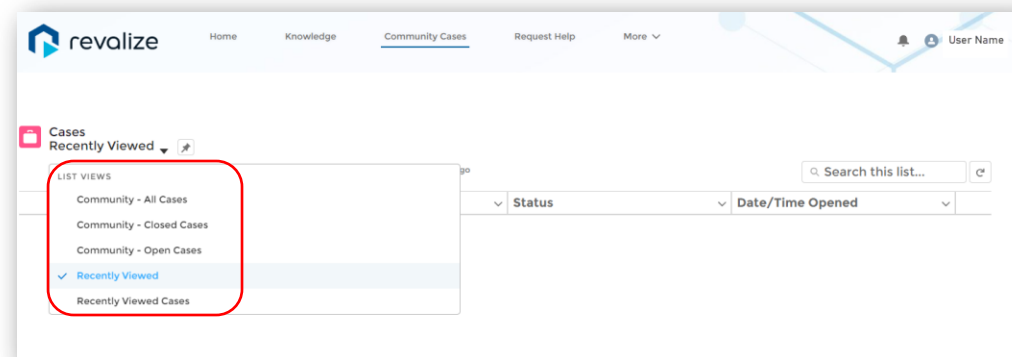
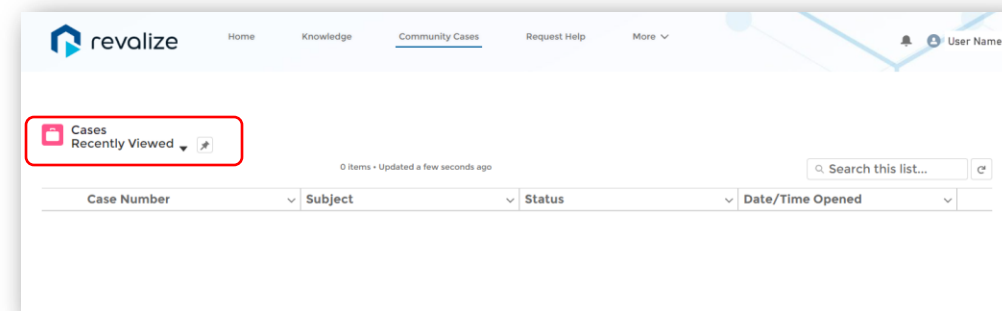
- **Priority:** Solution is non-operational, and users cannot access the system. Issue affects mission-critical functions or information and may include data loss or integrity.
- ***Only applies to production systems.***



# Revalize Customer Portal

## Community Cases

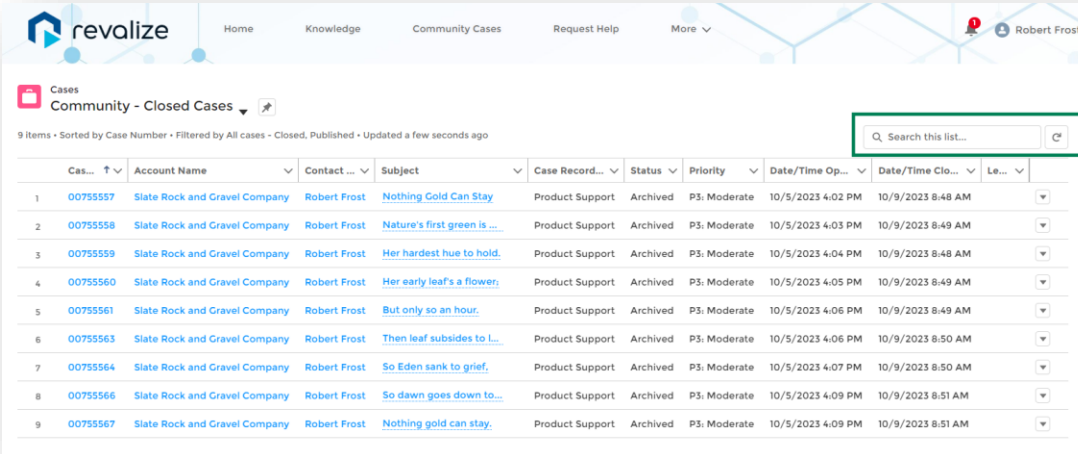
- After submitting the Request (Case), the User may find it and other previously submitted cases on the **Community Cases** page
- Standard views of cases include *Community – All Cases*; *Community – Closed Cases*; *Community – Open Cases*; and *Recently Viewed Cases*
- Users may select the appropriate view from the drop-down menu



# Revalize Customer Portal

## 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



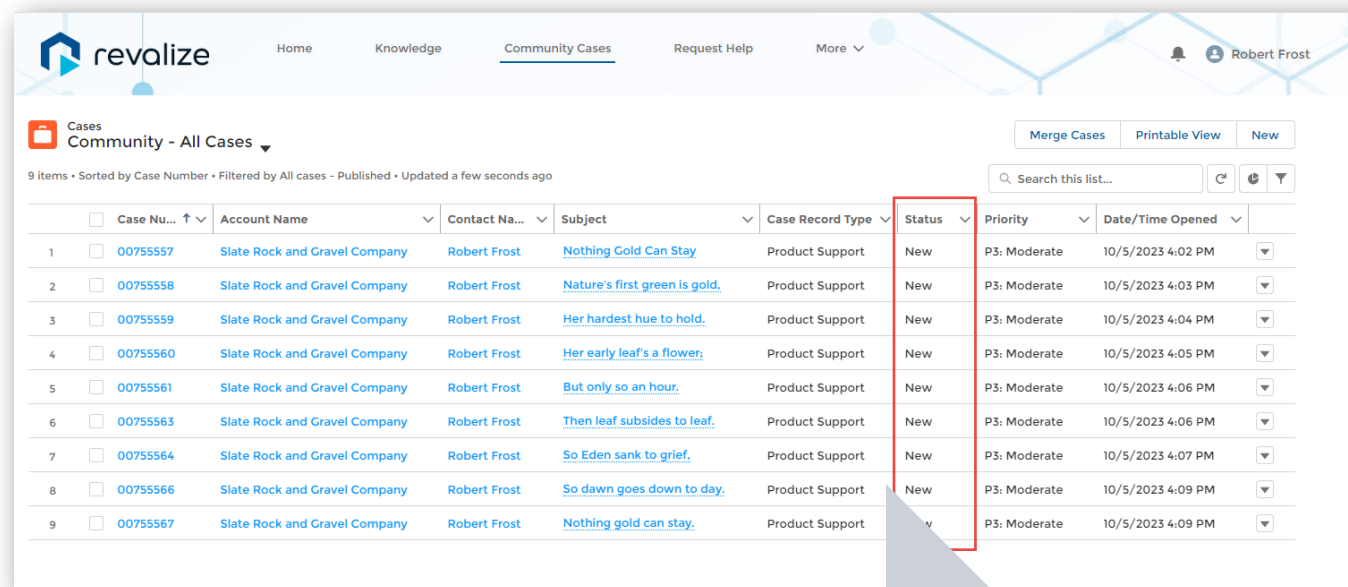
The screenshot displays the Revalize Customer Portal interface. At the top, there is a navigation bar with the Revalize logo and links for Home, Knowledge, Community Cases, Request Help, and More. A user profile for Robert Frost is visible in the top right corner. Below the navigation bar, the page title is "Cases" and the sub-page title is "Community - Closed Cases". A search bar is located in the top right of the list view, with the placeholder text "Search this list...". Below the search bar, there is a table with 9 items. The table columns are: Case Number, Account Name, Contact Name, Subject, Case Record, Status, Priority, Date/Time Opened, Date/Time Closed, and Le... (likely Lead). The table contains 9 rows of data, all with a status of "Archived" and a priority of "P3: Moderate".

Case...	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

# Revalize Customer Portal

## 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



The screenshot shows the Revalize Customer Portal interface. At the top, there are navigation links: Home, Knowledge, Community Cases (selected), Request Help, and More. The user's name, Robert Frost, is visible in the top right. Below the navigation, there's a search bar and buttons for Merge Cases, Printable View, and New. The main content area displays a table of cases with the following columns: Case Nu..., Account Name, Contact Na..., Subject, Case Record Type, Status, Priority, and Date/Time Opened. The Status column is highlighted with a red box, and all cases listed have a status of 'New'.

Case Nu...	Account Name	Contact Na...	Subject	Case Record Type	Status	Priority	Date/Time Opened
1	Slate Rock and Gravel Company	Robert Frost	Nothing Gold Can Stay	Product Support	New	P3: Moderate	10/5/2023 4:02 PM
2	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	Slate Rock and Gravel Company	Robert Frost	Her hardest hue to hold.	Product Support	New	P3: Moderate	10/5/2023 4:04 PM
4	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	Slate Rock and Gravel Company	Robert Frost	But only so an hour.	Product Support	New	P3: Moderate	10/5/2023 4:06 PM
6	Slate Rock and Gravel Company	Robert Frost	Then leaf subsides to leaf.	Product Support	New	P3: Moderate	10/5/2023 4:06 PM
7	Slate Rock and Gravel Company	Robert Frost	So Eden sank to grief.	Product Support	New	P3: Moderate	10/5/2023 4:07 PM
8	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	Slate Rock and Gravel Company	Robert Frost	Nothing gold can stay.	Product Support	New	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.

# Revalize Customer Portal

## 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*

The screenshot displays the Revalize Customer Portal interface. At the top, the navigation bar includes the Revalize logo, 'Home', 'Knowledge', 'Community Cases', 'Request Help', and 'More'. The user profile 'Robert Frost' is visible in the top right corner. The main content area is titled 'Case 00755557' and features a header section with the following details:

Subject	Contact Name	Account Name	Status	Case Owner	Responsible Party
Nothing Gold Can Stay	Robert Frost	Slate Rock and Gravel Company	Archived	Customer Support	

Below the header, there are three tabs: 'Details', 'Email', and 'Related'. The 'Details' tab is active and contains several sections:

- Case Details:** A table with fields for Case Product Brand (Revalize), Product (Revalize Customer Portal), Case Product Version (1923), Module, Module Version, Case Record Type (Product Support), Created By (Robert Frost, 10/5/2023 4:02 PM), Priority (P3: Moderate), Severity (S4: Low), Business Impact (Single User/Subscriber), Environment (Production/Live), Status (Archived), and Case Origin (Community).
- Problem Description:** A section with Subject (Nothing Gold Can Stay) and Description (A short poem by Robert Frost first published in The Yale Review in October 1923).
- Case Resolution:** A section with Case Closure Comments (The poem is written in the form of a lyric poem with an iambic trimeter meter and AABBCDD rhyme scheme.), Date/Time Closed (10/9/2023 8:48 AM), and a paragraph of text about the poem's significance.
- Contact Information:** A section with Account Name (Slate Rock and Gravel Company), Contact Name (Robert Frost), Contact Phone, Contact Email, and Email.

On the right side of the page, there is a 'Post' section with a text input field, a 'Share' button, a 'Close Case' button, and a 'Description Changed' notification. Below this is a 'Write a comment...' input field.

# Revalize Customer Portal

## 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

# Revalize Customer Portal

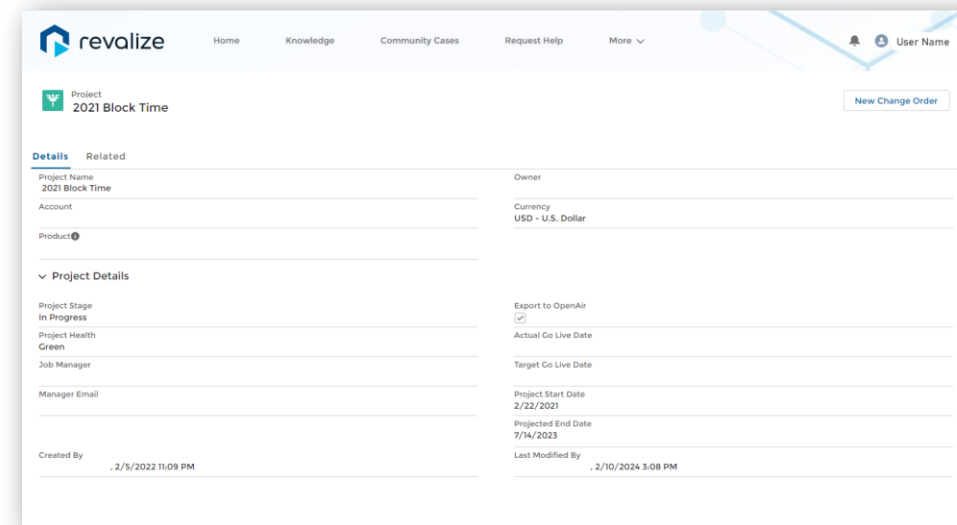
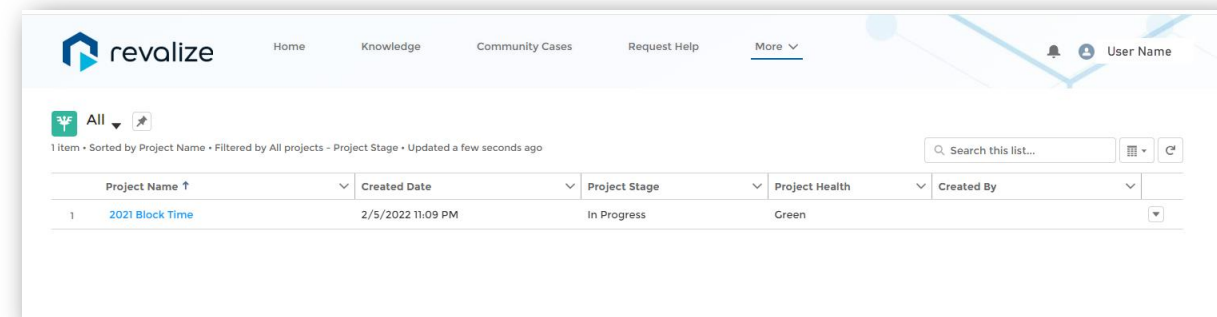
## Feedback

- 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

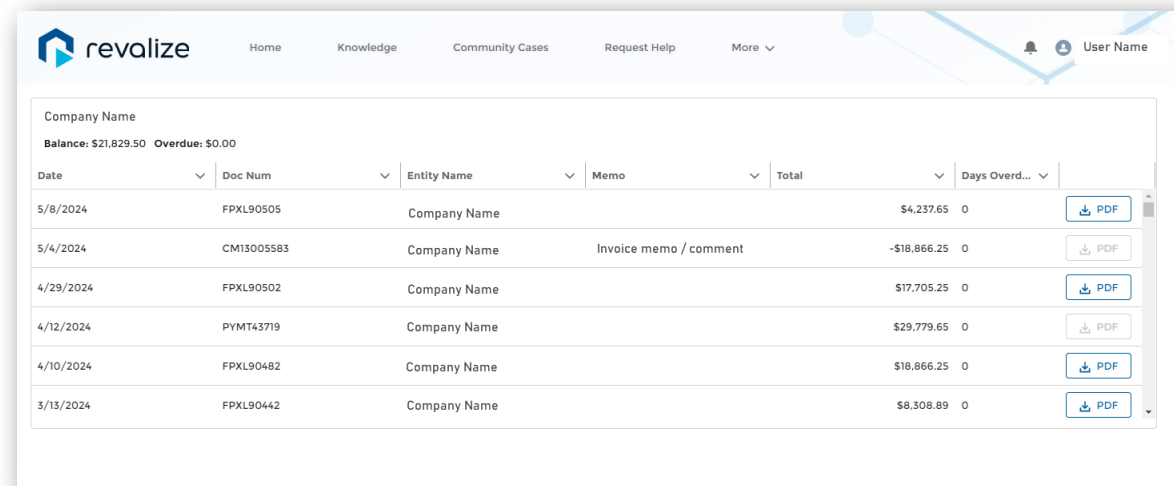




# Revalize Customer Portal

## 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



The screenshot displays the Revalize Customer Portal interface. At the top, the Revalize logo is on the left, and navigation links for Home, Knowledge, Community Cases, Request Help, and More are in the center. On the right, there is a user profile section with a notification bell, a user icon, and the text 'User Name'. Below the navigation is a summary card for 'Company Name' showing a balance of \$21,829.50 and an overdue amount of \$0.00. The main part of the screen is a table of invoices with columns for Date, Doc Num, Entity Name, Memo, Total, and Days Overdue. Each row includes a 'PDF' download button.

Date	Doc Num	Entity Name	Memo	Total	Days Overdue	
5/8/2024	FPXL90505	Company Name		\$4,237.65	0	<a href="#">PDF</a>
5/4/2024	CM13005583	Company Name	Invoice memo / comment	-\$18,866.25	0	<a href="#">PDF</a>
4/29/2024	FPXL90502	Company Name		\$17,705.25	0	<a href="#">PDF</a>
4/12/2024	PYMT43719	Company Name		\$29,779.65	0	<a href="#">PDF</a>
4/10/2024	FPXL90482	Company Name		\$18,866.25	0	<a href="#">PDF</a>
3/13/2024	FPXL90442	Company Name		\$8,308.89	0	<a href="#">PDF</a>



**Thank you**