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KYNECTION
KNOWLEDGE IN MOTION

FEATURE GUIDE

KYNECTION · KUSTOMER PORTAL · PART 1

Register For and Access *a Kynection Project*

The client's way in. Opening the project invitation, registering, signing in, and reading the schedule, milestones, finance and forms for the project you have been given access to.

3 CHAPTERS

55 SEC

KUSTOMER PORTAL

CLIENTS · PORTAL USERS

FEATURE GUIDE · 55 SEC

What this feature covers

Three stages, eight steps: registering, opening the project, and reading what it shows you.

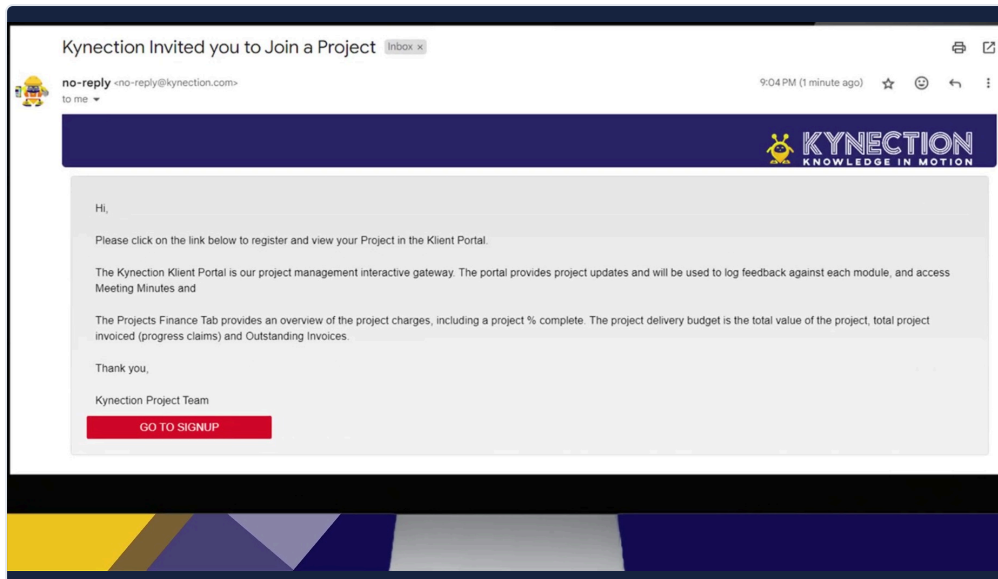
CH 01	Register for the portal The invitation email starts the process.	00:00–00:24
CH 02	Open the project The project view carries schedule, milestones and finance.	00:24–00:44
CH 03	Forms and documents What has been submitted against the project is readable from the portal.	00:44–00:55

- **This one goes to your client.** Everything here is what the customer does, so the guide can be sent to them directly.
- **Access is per project.** A client sees the projects they have been invited to, not your whole portfolio.
- **Submitted documents are visible.** Meeting documents and admin forms lodged against the project can be opened from the portal.

READ AS Screens are captured from the walkthrough video at the timestamp shown on each step. Company names, policy numbers and dollar values are demonstration data.

Register for the portal

The invitation email starts the process.

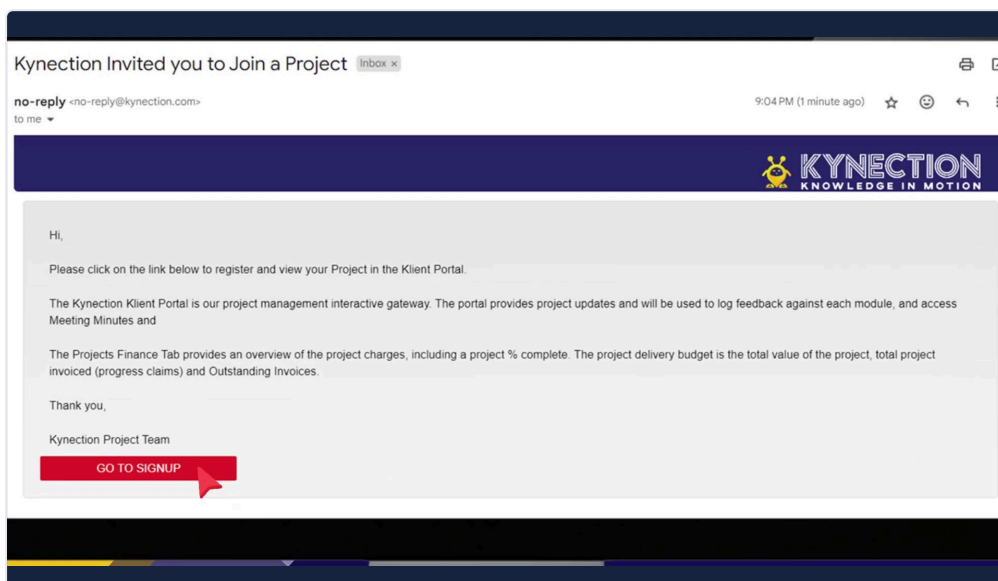


STEP 1 • 00:07 IN THE VIDEO

Open the invitation

The Kynection project invitation arrives by email with a registration link.

CHAPTER 01 • STEP 1 OF 3



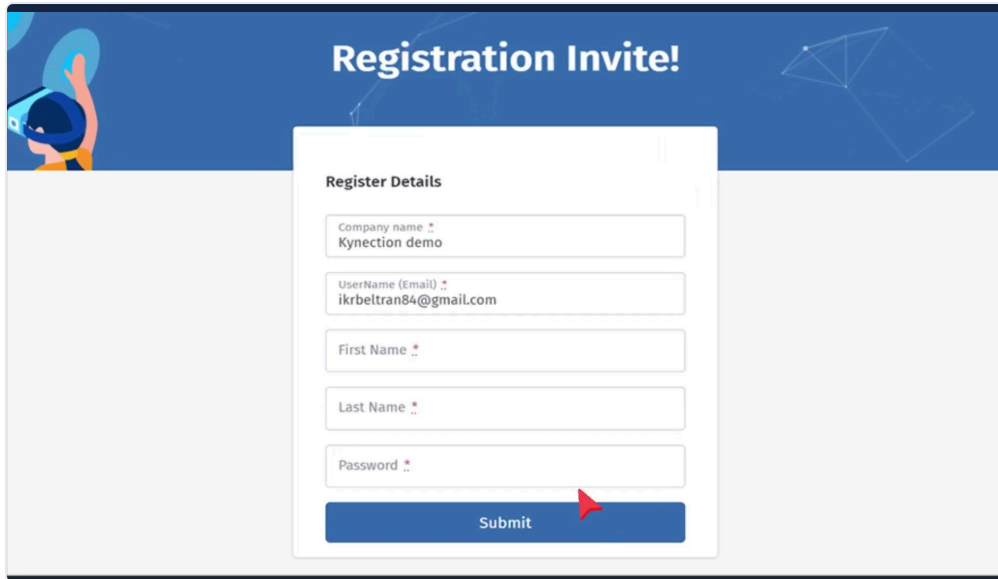
STEP 2 • 00:09 IN THE VIDEO

Complete registration

Registration takes the details for the person who will use the portal.

CHAPTER 01 • STEP 2 OF 3

Register for the portal

A screenshot of a web interface titled "Registration Invite!". The interface has a blue header with a stylized illustration of a person wearing a VR headset on the left and a network diagram on the right. In the center, there is a white registration form titled "Register Details". The form contains five input fields: "Company name" with the value "Kynecton demo", "UserName (Email)" with the value "ikrbeltran84@gmail.com", "First Name", "Last Name", and "Password". Each field has a small red asterisk icon to its right. Below the fields is a blue "Submit" button. A red arrow points to the "Submit" button.

Registration Invite!

Register Details

Company name *
Kynecton demo

UserName (Email) *
ikrbeltran84@gmail.com

First Name *

Last Name *

Password *

Submit

STEP 3 • 00:14 IN THE VIDEO

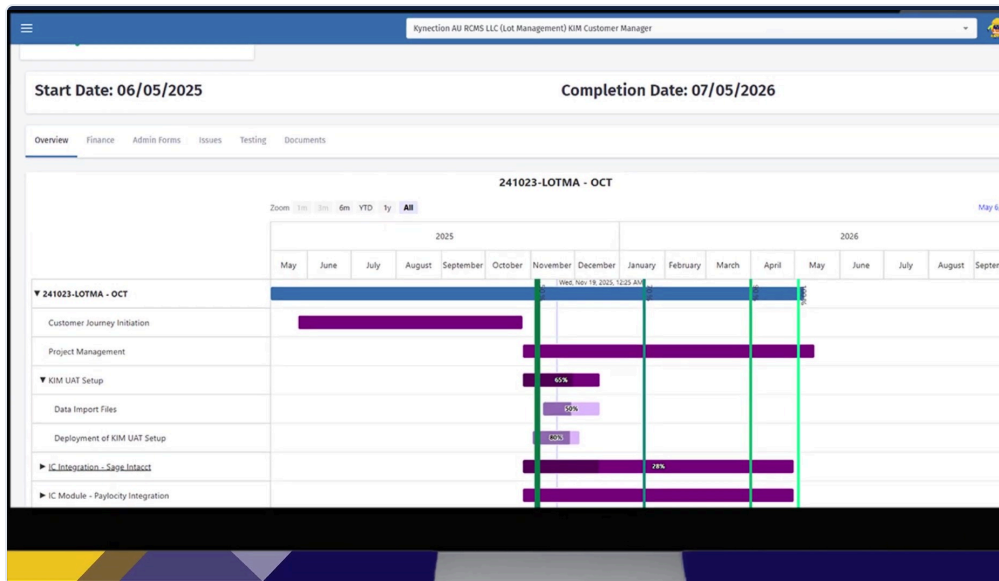
Sign in

Signing in opens the portal to the projects you have been given access to.

CHAPTER 01 • STEP 3 OF 3

Open the project

The project view carries schedule, milestones and finance.

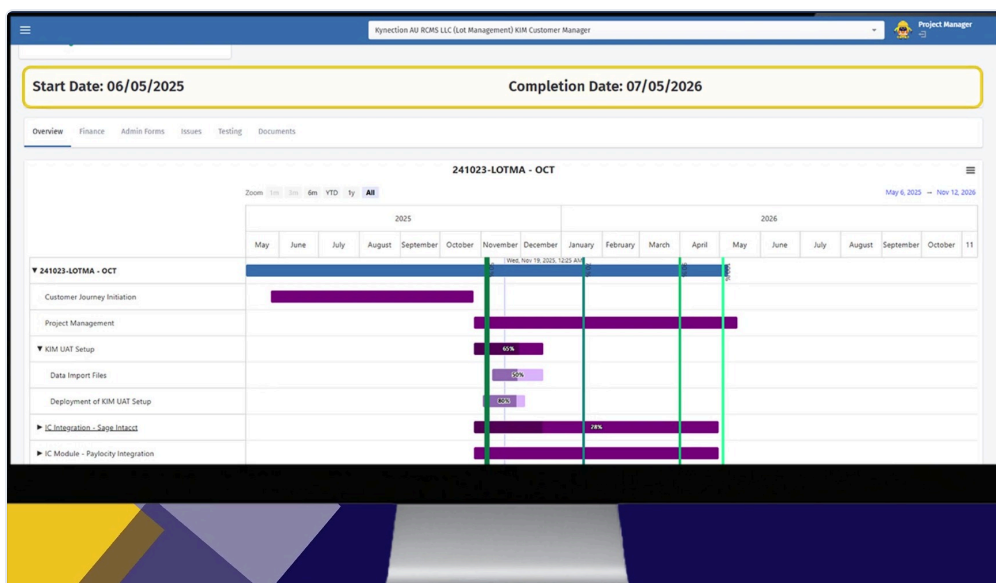


STEP 1 • 00:29 IN THE VIDEO

Open your project

The assigned project opens with its start and completion dates.

CHAPTER 02 • STEP 1 OF 3



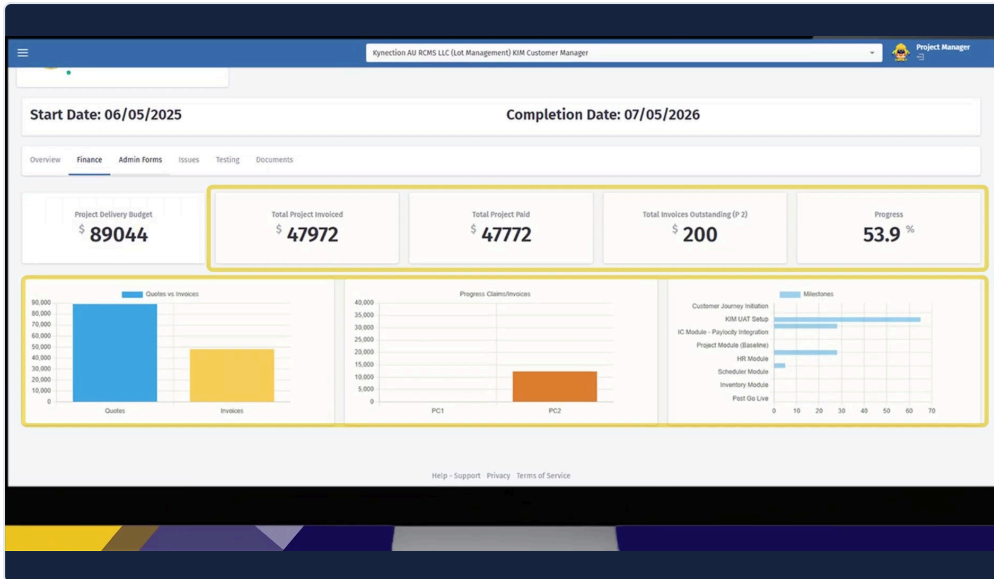
STEP 2 • 00:32 IN THE VIDEO

Read the schedule

The schedule and milestones show what is planned and how it is tracking.

CHAPTER 02 • STEP 2 OF 3

Open the project



STEP 3 • 00:42 IN THE VIDEO

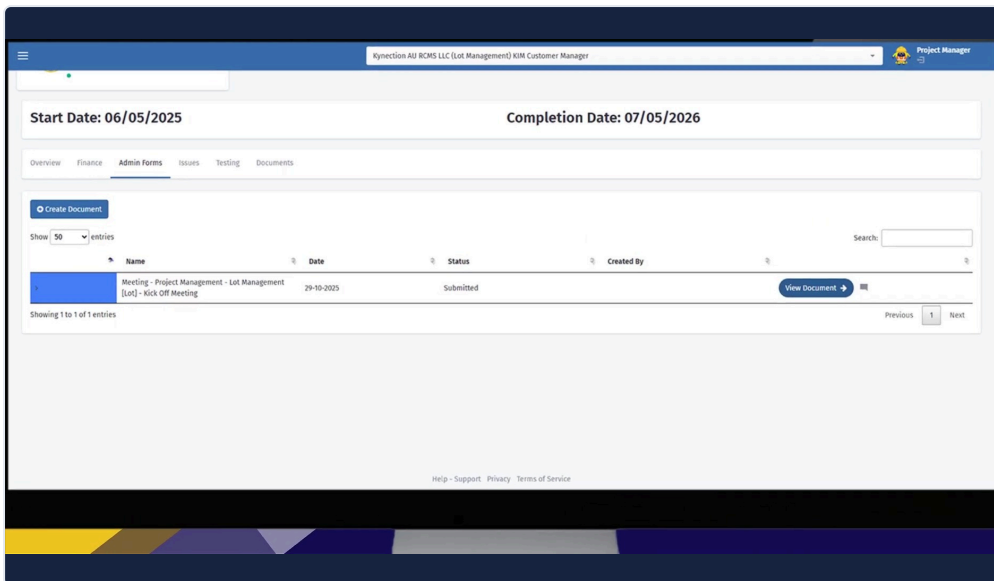
Check the finance

Finance shows the project's budget position and progress.

CHAPTER 02 • STEP 3 OF 3

Forms and documents

What has been submitted against the project is readable from the portal.

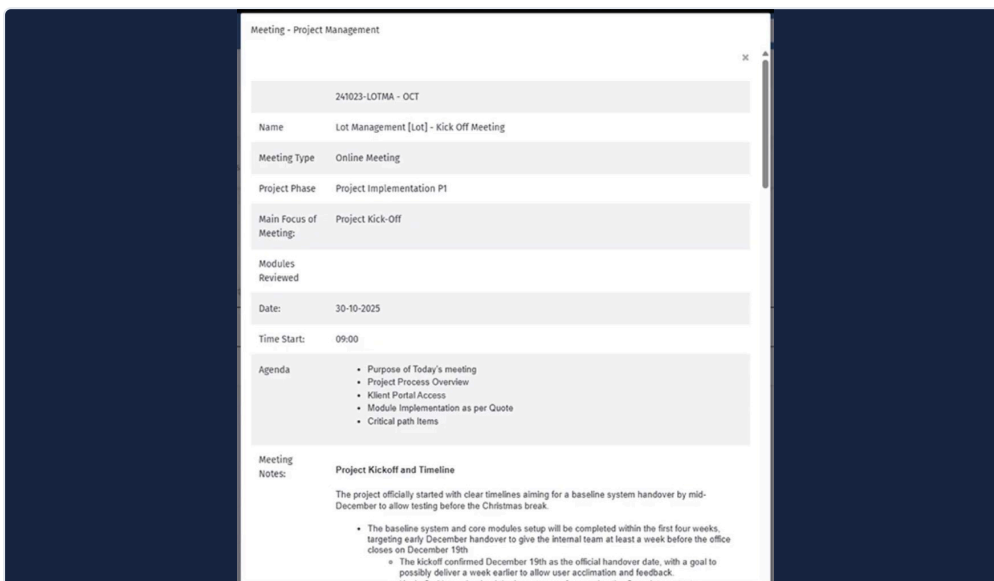


STEP 1 • 00:46 IN THE VIDEO

Open admin forms

Admin forms lodged against the project are listed here.

CHAPTER 03 • STEP 1 OF 2



STEP 2 • 00:51 IN THE VIDEO

Read a submitted document

Documents such as meeting notes can be opened and read in full.

CHAPTER 03 • STEP 2 OF 2

NEXT

Where to go next

This guide covers one part of the module. The rest of the series covers it end to end.

NEXT UP - Kustomer 02

Submit and track project issues

THE REST OF THE KUSTOMER PORTAL

Ask your Kynnection account manager for the other guides in this series

MORE IN THIS MODULE

Kustomer 02 Submit and track project issues
