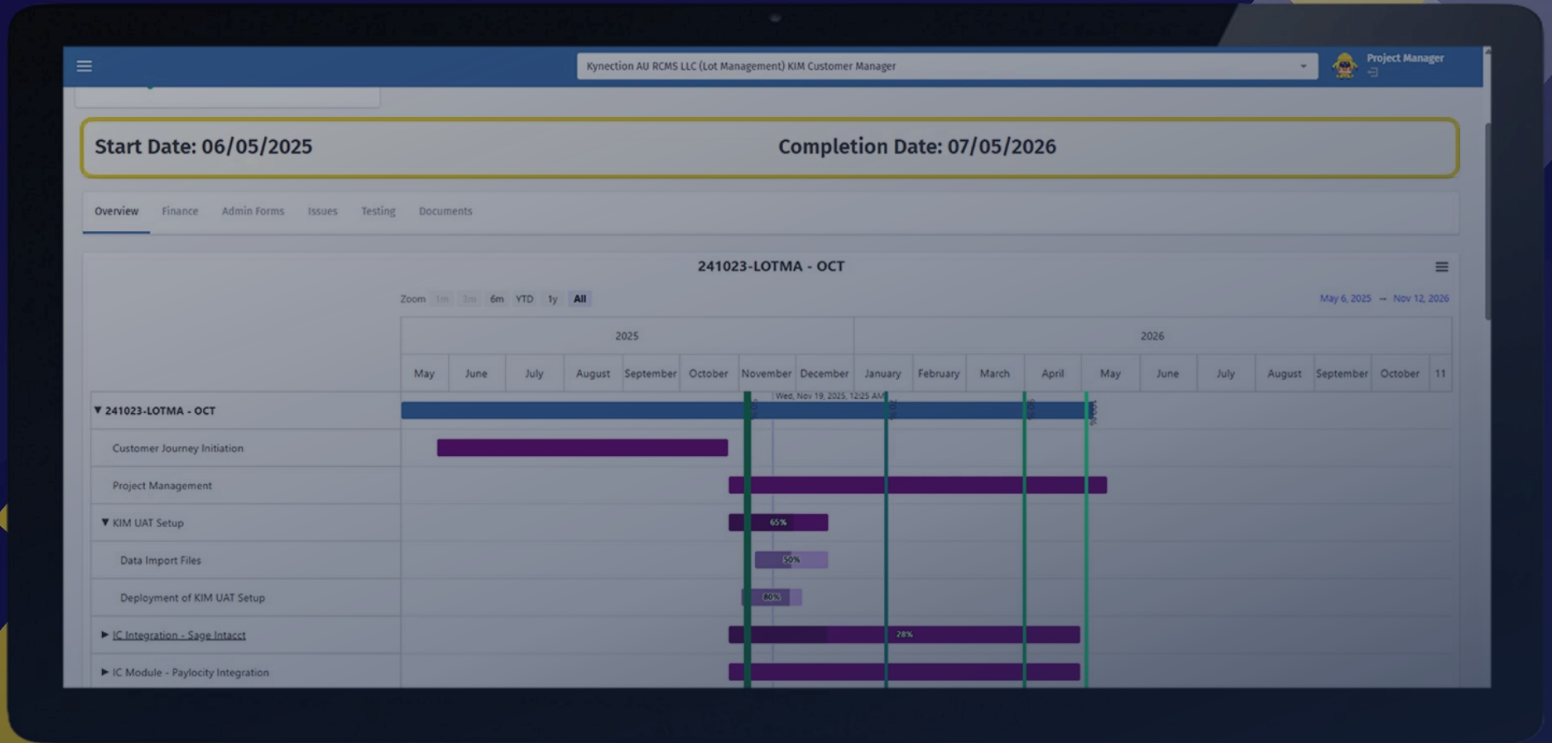




MODULE OVERVIEW

KYNECTION · KUSTOMER PORTAL

Use the Kustomer Portal *Complete Project Guide*

The module overview, written for the client. Registering from the invitation, reading the project schedule, milestones and finance, opening the forms and documents lodged against the job, and raising and tracking an issue through to resolution.

4 CHAPTERS

2 MIN 22 SEC

KUSTOMER PORTAL

CLIENTS · PORTAL USERS

What this module overview covers

Four stages cover the whole portal. Chapter 1 is registration and sign-in. Chapter 2 is the project view. Chapters 3 and 4 are forms, issues and documents.

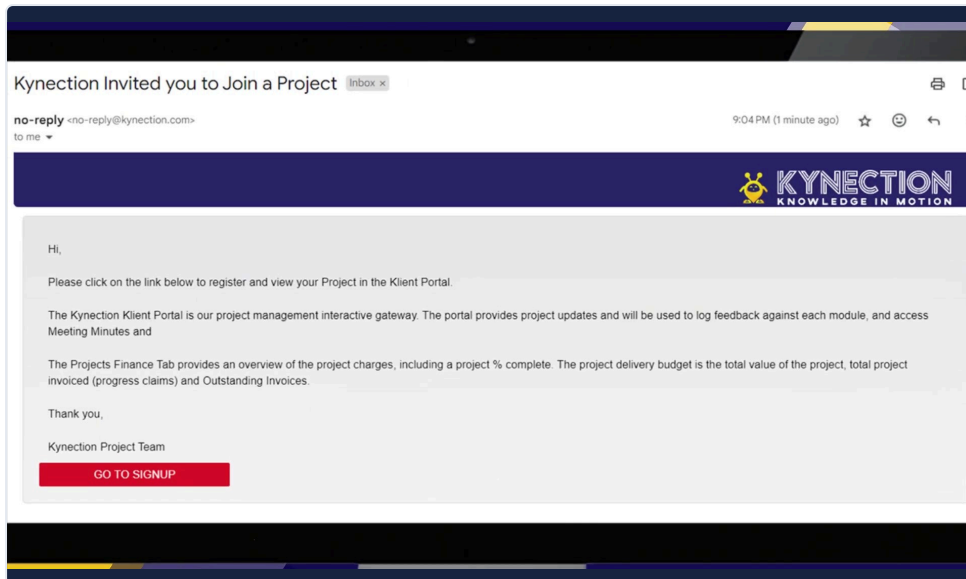
CH 01	Register and sign in The invitation email is the way in.	00:00–00:24
CH 02	Read the project Schedule, milestones and finance, all from the client's side.	00:24–00:48
CH 03	Forms and documents What has been lodged against the project is readable from the portal.	00:48–01:03
CH 04	Raise and track issues The feedback loop: describe it, attach evidence, then follow it to resolution.	01:03–02:21

- **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 only the projects they have been invited to, not your whole portfolio.
- **Issues are the audit trail.** Every issue keeps its notes, attachments, status and responsibility against the project, so nothing depends on remembering an email.

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

Register and sign in

The invitation email is the way in.

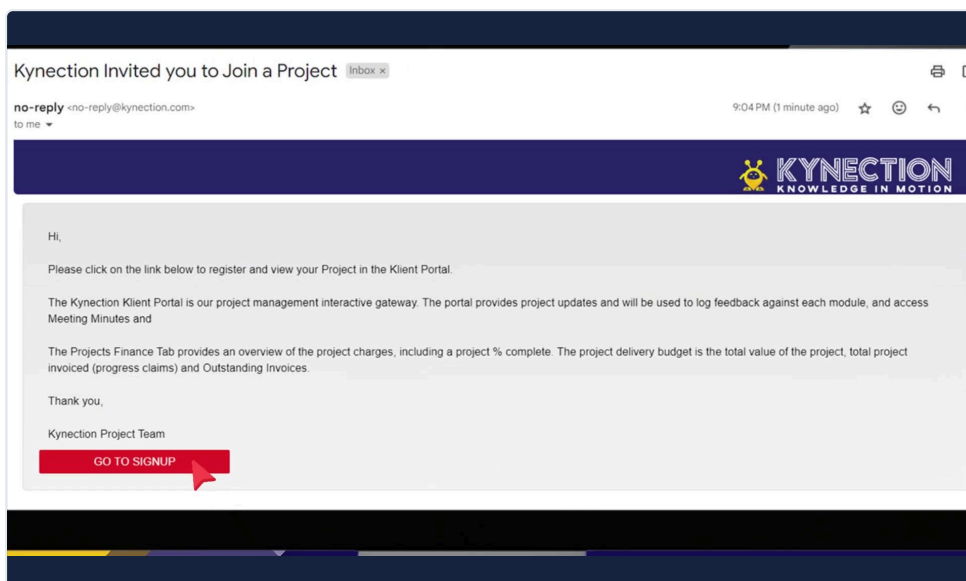


STEP 1 • 00:08 IN THE VIDEO

Open the invitation

The Kynection project invitation arrives by email, explaining that the portal provides project updates and is used to log feedback against each module.

CHAPTER 01 • STEP 1 OF 3



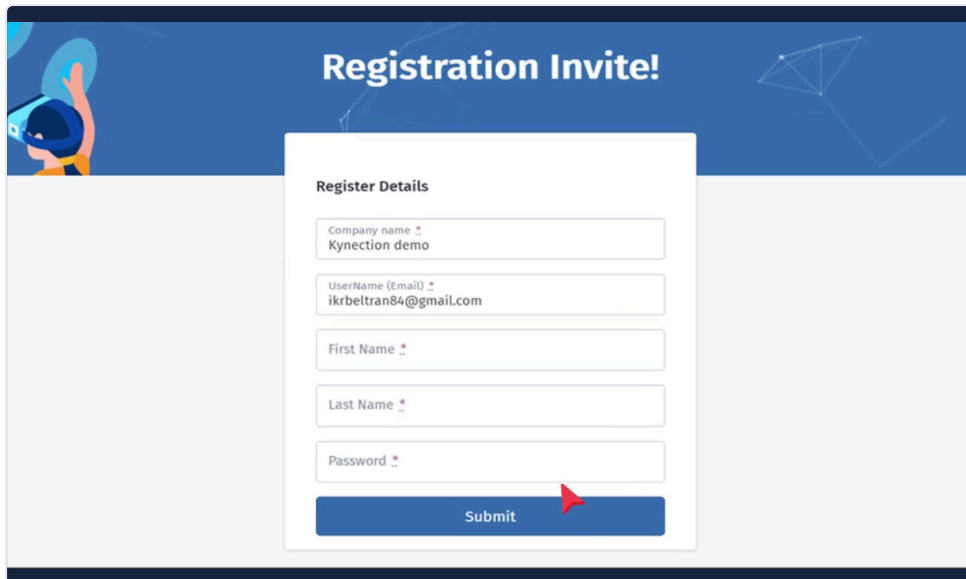
STEP 2 • 00:09 IN THE VIDEO

Follow the signup link

Go to Signup opens registration.

CHAPTER 01 • STEP 2 OF 3

Register and sign in



The image shows a web interface for registration. At the top, there's a blue header with the text "Registration Invite!". Below this, a white form titled "Register Details" is centered. The form contains five input fields: "Company name" (with "Kynection demo" entered), "UserName (Email)" (with "ikrbeltran84@gmail.com" entered), "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 mouse cursor arrow is pointing at the "Submit" button. The background of the form is light gray, and the overall page has a blue header and footer.

STEP 3 • 00:14 IN THE VIDEO

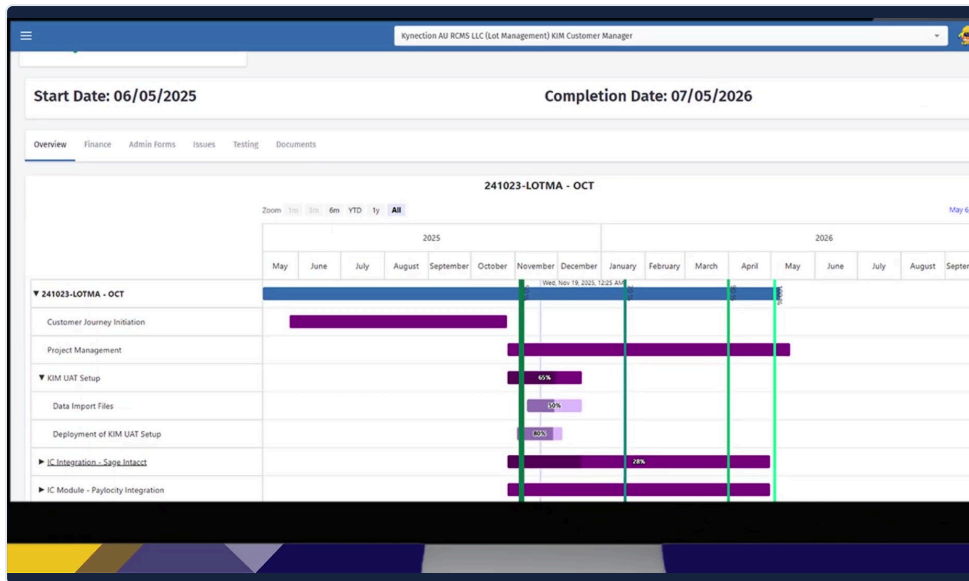
Register your details

Registration takes the company name, username or email, first and last name and a password.

CHAPTER 01 • STEP 3 OF 3

Read the project

Schedule, milestones and finance, all from the client's side.

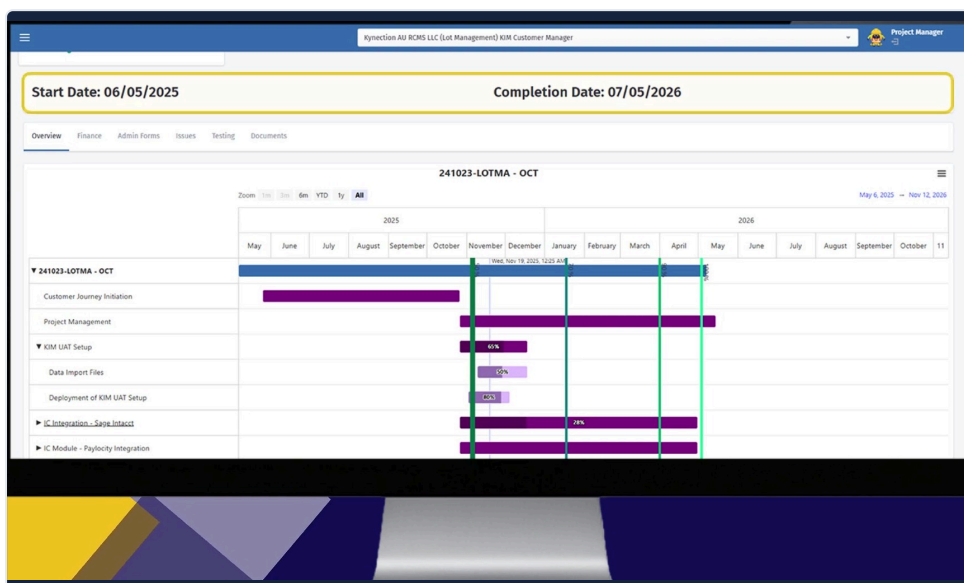


STEP 1 • 00:29 IN THE VIDEO

Open the assigned project

The project opens with its start and completion dates, and the schedule laid out across the months.

CHAPTER 02 • STEP 1 OF 3



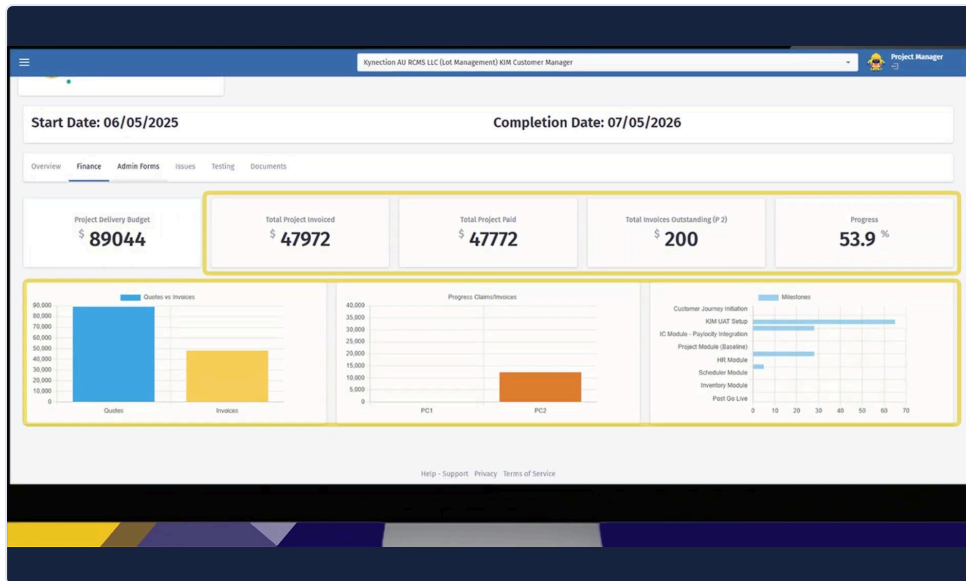
STEP 2 • 00:32 IN THE VIDEO

Read the schedule

Milestones show as bars on the timeline, so what is planned and how it is tracking is visible at a glance.

CHAPTER 02 • STEP 2 OF 3

Read the project



STEP 3 • 00:42 IN THE VIDEO

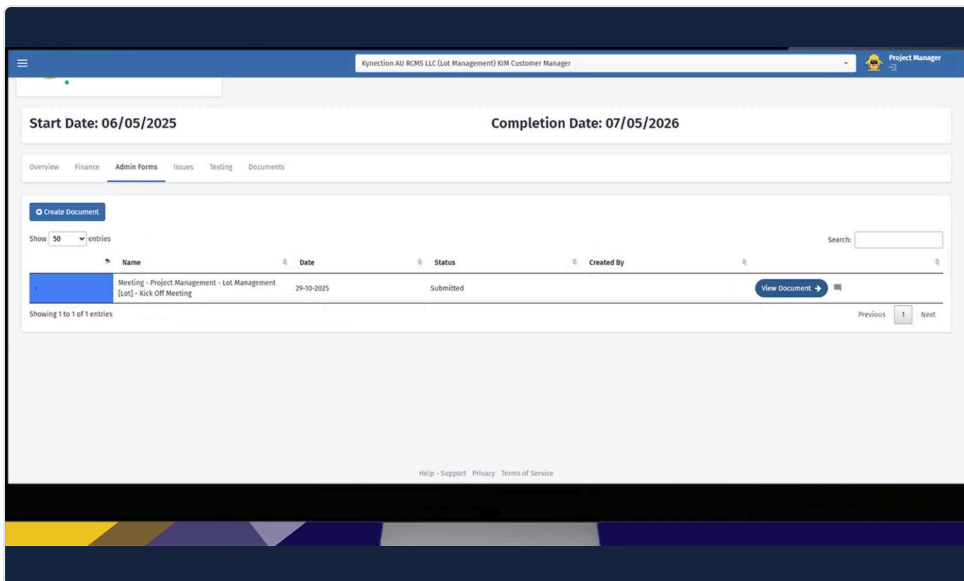
Check the finance

The finance tab shows the project charges, percentage complete, delivery budget, total project invoiced against progress claims, and outstanding invoices.

CHAPTER 02 • STEP 3 OF 3

Forms and documents

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

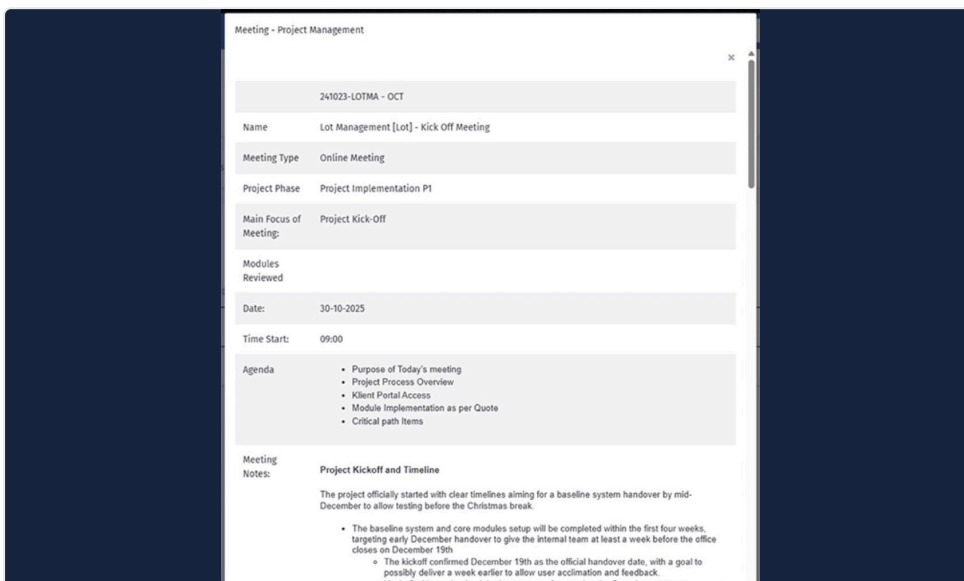


STEP 1 • 00:46 IN THE VIDEO

Open admin forms

Admin forms lodged against the project list with their date, status and who created them.

CHAPTER 03 • STEP 1 OF 3



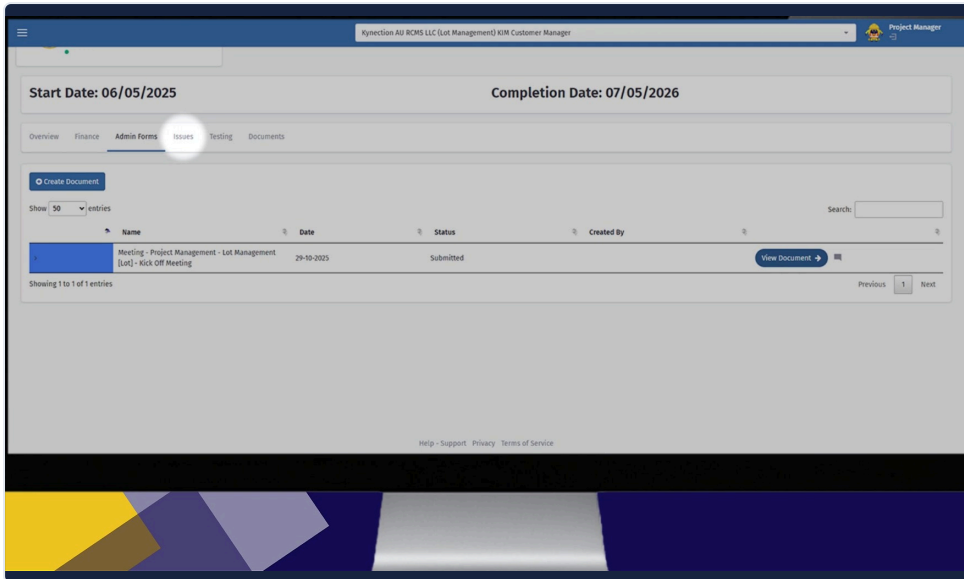
STEP 2 • 00:51 IN THE VIDEO

Read a submitted document

Documents such as meeting minutes open in full, covering the meeting type, phase, attendees, agenda and project outlook.

CHAPTER 03 • STEP 2 OF 3

Forms and documents



STEP 3 • 00:55 IN THE VIDEO

Reach the issues area

Issues is reached from the same project navigation.

CHAPTER 03 • STEP 3 OF 3

Raise and track issues

The feedback loop: describe it, attach evidence, then follow it to resolution.

The screenshot shows a mobile interface for adding a new issue. The form includes the following fields and options:

- Title:** A text input field.
- Module:** A dropdown menu with 'Customer Journey Initiation' selected.
- Description:** A text area with the placeholder 'Write a comment'.
- Priority:** A dropdown menu with 'Low' selected.
- Issue Type:** A dropdown menu with 'User Access' selected.
- HR:** A dropdown menu.
- Files:** A dashed box with the text 'Drop files or click to upload'.
- Send:** A blue button at the bottom.

STEP 1 • 01:08 IN THE VIDEO

Create an issue

A new issue takes its description and detail, ready to lodge against the project.

CHAPTER 04 • STEP 1 OF 6

The screenshot shows a table listing issues. The table has the following columns: Name, Date, Created By, Module, Resolution Stage, Current Responsibility, Description, Completion Date, Completed By, and Files. The data is as follows:

Name	Date	Created By	Module	Resolution Stage	Current Responsibility	Description	Completion Date	Completed By	Files
Final testing of Shift report	19-08-2024	Irene Karla R. Beltran			Kynecton demo				View Form Add Mark Closed
Forward list	19-08-2024	Irene Karla R. Beltran			Kynecton demo				View Form Add Mark Closed
Portal issues review and closure	19-08-2024	Irene Karla R. Beltran			Kynecton demo				View Form Add Mark Closed
Review and update / confirm User and Contact mapping	19-08-2024	Irene Karla R. Beltran			Kynecton demo				View Form Add Mark Closed
Review, update and approval of User / Contact Matrix.	19-08-2024	Irene Karla R. Beltran			Kynecton demo				View Form Add Mark Closed

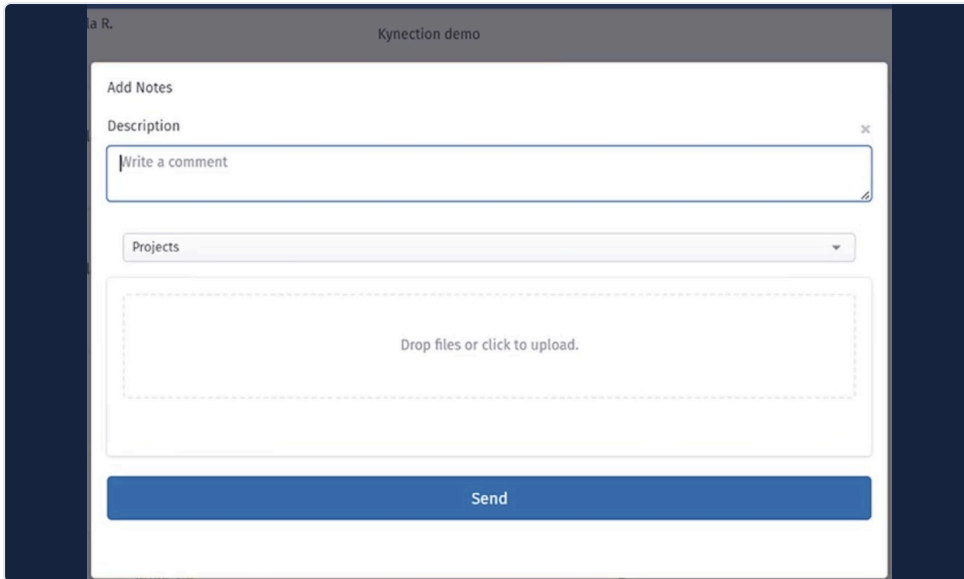
STEP 2 • 01:25 IN THE VIDEO

Read the issue register

The register lists every issue with its date, module, resolution stage, current responsibility, description, completion date and files.

CHAPTER 04 • STEP 2 OF 6

Raise and track issues



STEP 3 • 01:46 IN THE VIDEO

Add notes and attachments

Notes and files are added to an issue as it progresses, which is what saves the follow-up conversation.

CHAPTER 04 • STEP 3 OF 6

KYNECTION

KYNECTION

Karla Beltran

Portal issues review and closure	19-08-2024	Irene Karla R. Beltran	Kynnection demo	Add Mark Closed			
Review and update / confirm User and Contact mapping	19-08-2024	Irene Karla R. Beltran	Kynnection demo	View Form Add Mark Closed			
Review, update and approval of User / Contact Matrix.	19-08-2024	Irene Karla R. Beltran	Kynnection demo	View Form Add Mark Closed			
Test HR Issue	19-08-2024	Project Manager	KHRC_HR Module build	Reported	Kynnection	Module: KHRC_HR Module build Test HR Missing Issue	 Test.png  Add Mark Closed
Test HR Issues	22-08-2024	Karla Beltran	KHRC_HR Module build	Reported	Kynnection	Module: KHRC_HR Module build Test Issues	 Portal Invite.png  Add Mark Closed

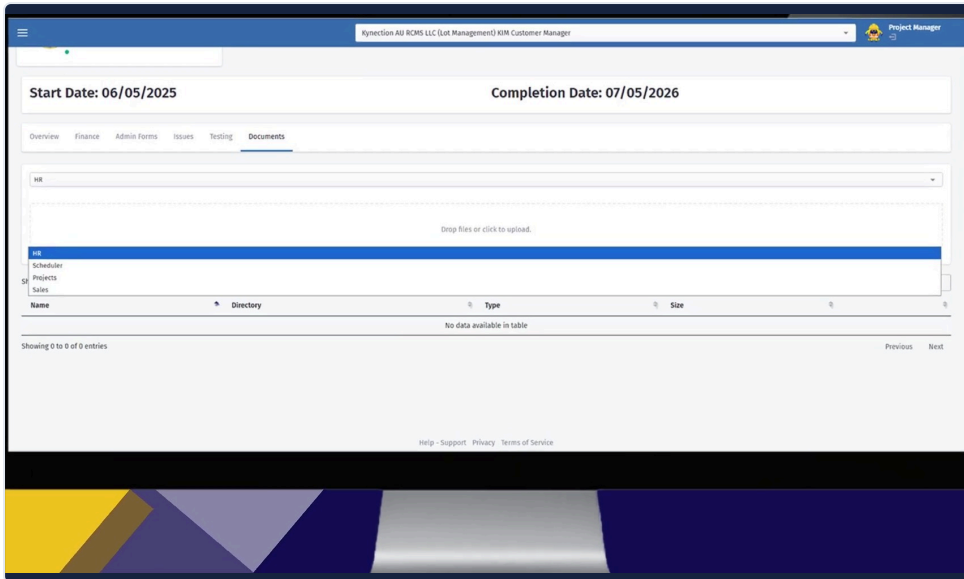
STEP 4 • 02:00 IN THE VIDEO

Track status and responsibility

Each issue carries its status and who currently holds it, so progress is visible without chasing anyone.

CHAPTER 04 • STEP 4 OF 6

Raise and track issues

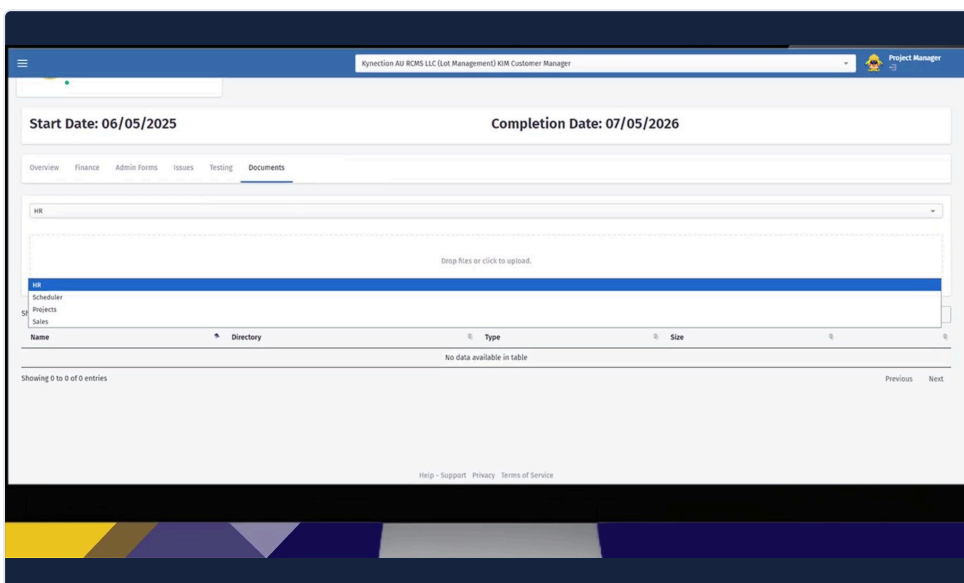


STEP 5 • 02:07 IN THE VIDEO

Check assigned tasks

Testing and other tasks assigned to you list against the project.

CHAPTER 04 • STEP 5 OF 6



STEP 6 • 02:09 IN THE VIDEO

Open the project documents

Project documents are reachable from the same view.

CHAPTER 04 • STEP 6 OF 6