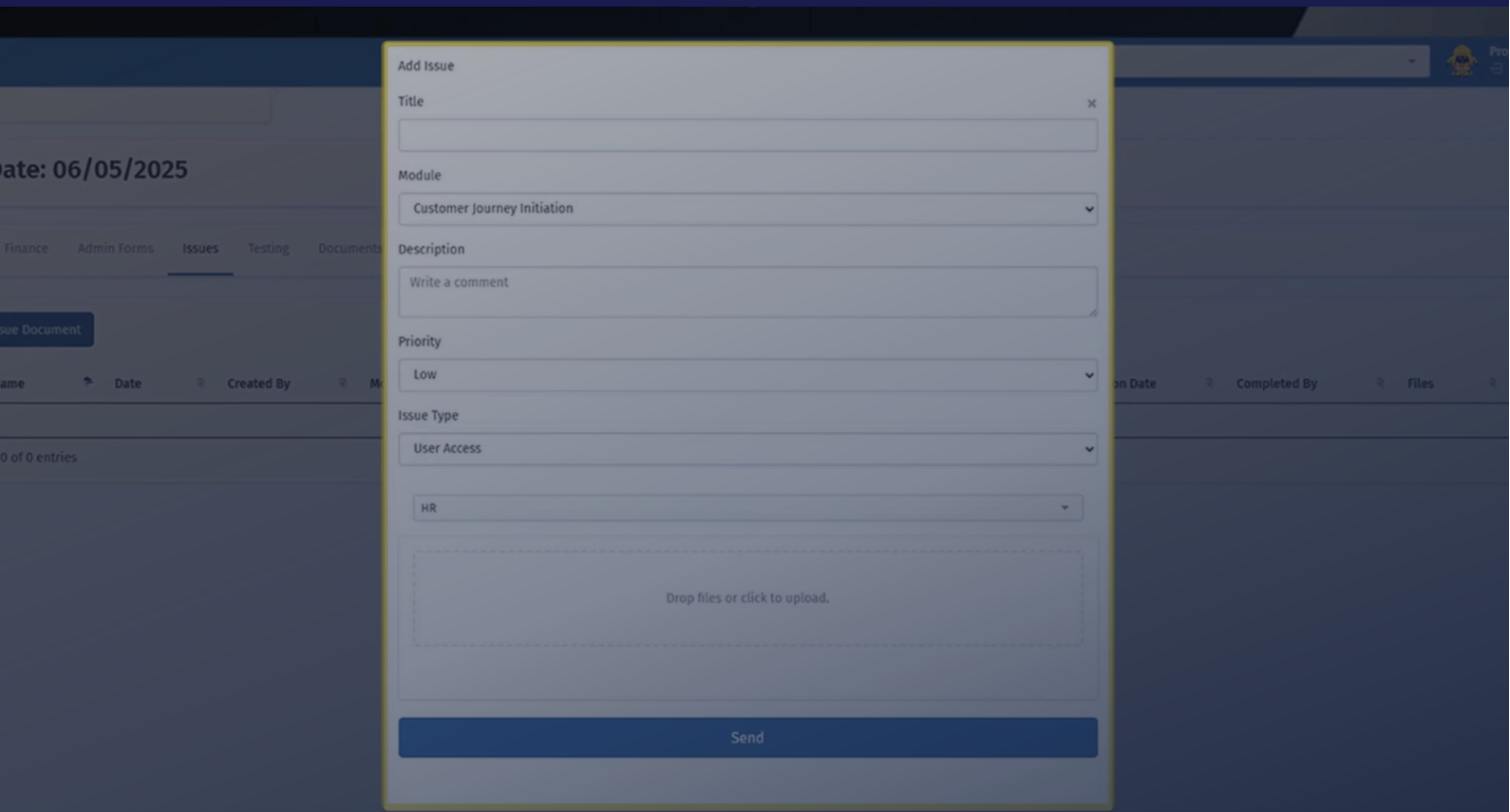




KYNECTION
KNOWLEDGE IN MOTION

FEATURE GUIDE

KYNECTION · KUSTOMER PORTAL · PART 2

Submit and Track *Project Issues*

Raising an issue against a project from the client side: creating the issue document, attaching files, then tracking its actions and status through to resolution.

4 CHAPTERS

1 MIN 29 SEC

KUSTOMER PORTAL

CLIENTS · PORTAL USERS

FEATURE GUIDE · 1 MIN 29 SEC

What this feature covers

Four stages, eleven steps: opening the issues area, creating an issue, tracking it, and reaching the project documents.

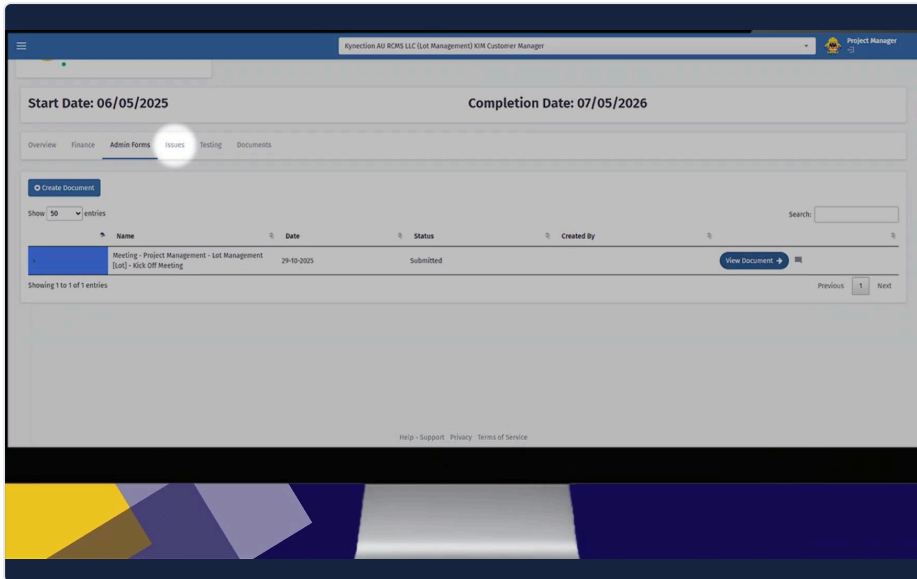
CH 01	Open the issues area Issues sit on the project you have access to.	00:00–00:14
CH 02	Raise the issue Describe it, attach what supports it, and lodge it.	00:14–00:34
CH 03	Track the issue Actions and status show where an issue has got to.	00:34–01:14
CH 04	Tasks and documents The rest of what the portal gives a client.	01:14–01:29

- **This one goes to your client.** Everything here is what the customer does, so the guide can be sent to them directly.
- **Attach evidence at the time.** Files uploaded with the issue save the back-and-forth that follows a vague description.
- **The register is the audit trail.** Every issue keeps its actions, status and attachments against the project.

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.

Open the issues area

Issues sit on the project you have access to.

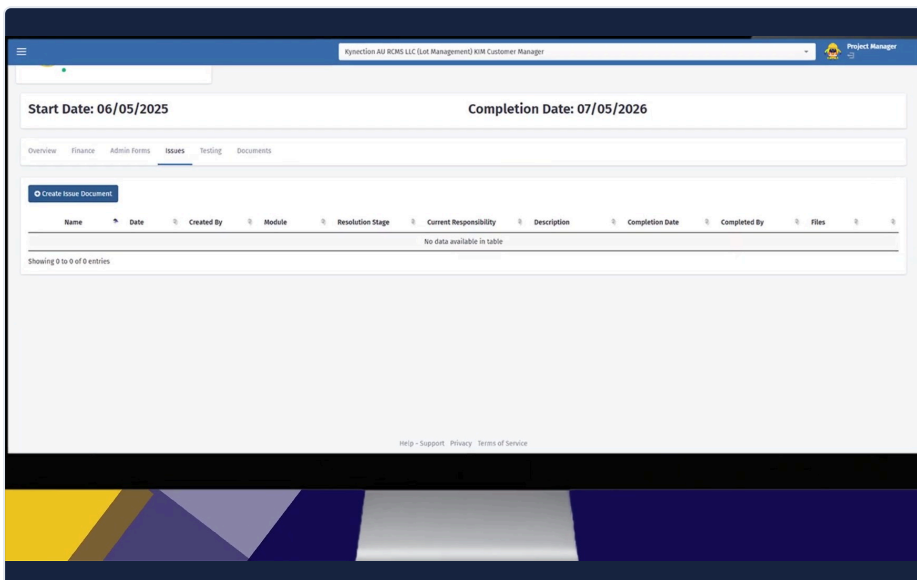


STEP 1 • 00:02 IN THE VIDEO

Open your project

The project record shows what you have been given access to.

CHAPTER 01 • STEP 1 OF 3



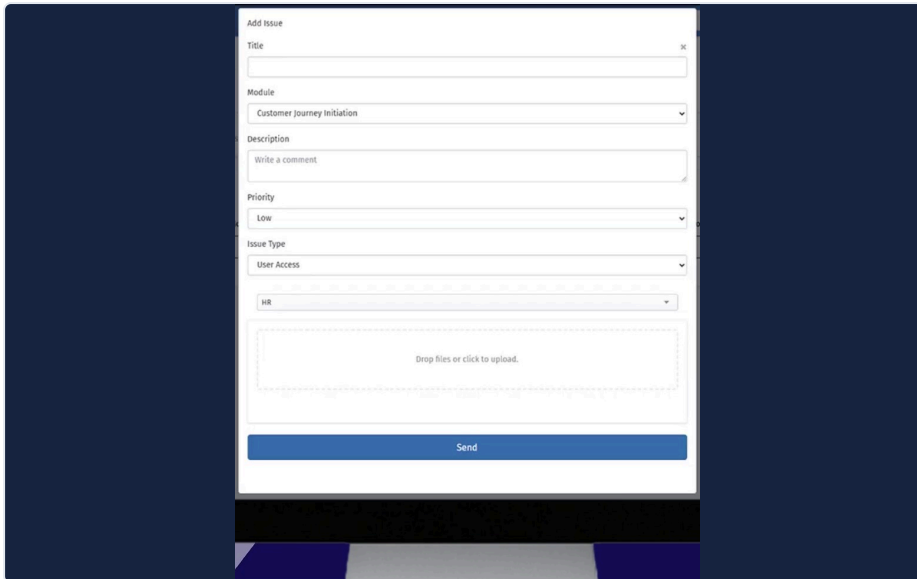
STEP 2 • 00:09 IN THE VIDEO

Find the issues area

Issues is reached from the project's own navigation.

CHAPTER 01 • STEP 2 OF 3

Open the issues area



Add Issue

Title

Module

Customer journey initiation

Description

Write a comment

Priority

Low

Issue Type

User Access

HR

Drop files or click to upload.

Send

STEP 3 • 00:14 IN THE VIDEO

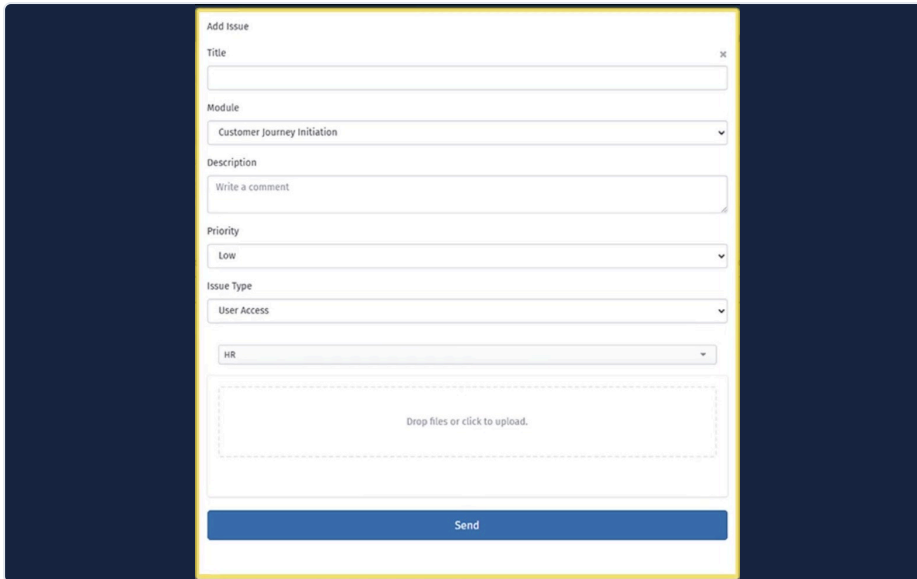
Create an issue

Starting a new issue opens an issue document to complete.

CHAPTER 01 • STEP 3 OF 3

Raise the issue

Describe it, attach what supports it, and lodge it.



The screenshot shows a 'Add Issue' form with the following fields and options:

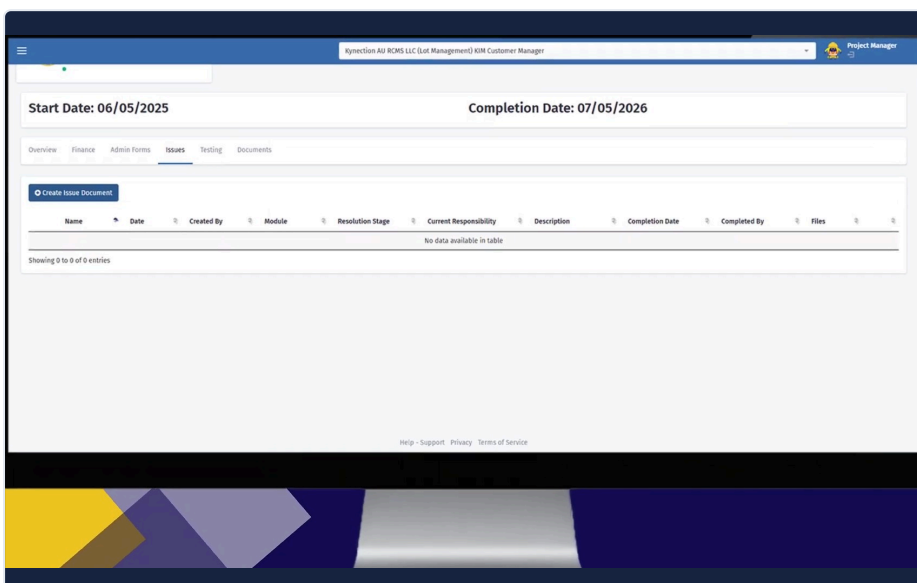
- Title:** A text input field with a close icon (X) on the right.
- Module:** A dropdown menu currently showing 'Customer journey Initiation'.
- Description:** A text area with a placeholder 'Write a comment' and a small icon on the right.
- Priority:** A dropdown menu currently showing 'Low'.
- Issue Type:** A dropdown menu currently showing 'User Access'.
- HR:** A dropdown menu currently showing 'HR'.
- File Upload:** A dashed box with the text 'Drop files or click to upload.'
- Send:** A blue button at the bottom.

STEP 1 • 00:18 IN THE VIDEO

Enter the detail and attach files

The issue takes its description and any supporting files, which is what saves the follow-up conversation.

CHAPTER 02 • STEP 1 OF 2



The screenshot shows the 'Issues' register in the Kymation system. The header includes 'Start Date: 06/05/2025' and 'Completion Date: 07/05/2026'. The main content area is a table with the following columns: Name, Date, Created By, Module, Resolution Stage, Current Responsibility, Description, Completion Date, Completed By, and Files. The table is currently empty, showing 'no data available in table'. The footer includes 'Showing 0 to 0 of 0 entries' and a 'Help - Support - Privacy - Terms of Service' link.

STEP 2 • 00:28 IN THE VIDEO

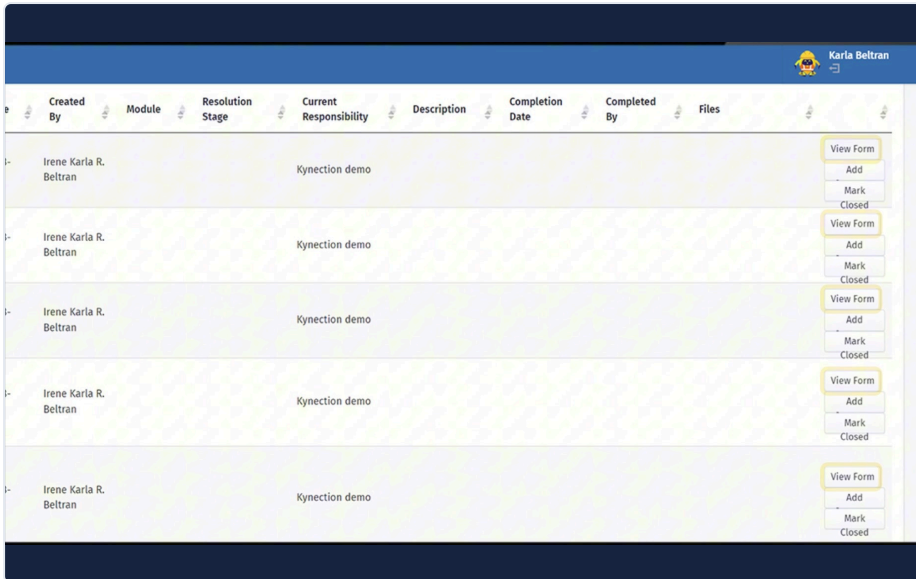
Return to the register

Submitting returns you to the issue register with the new item listed.

CHAPTER 02 • STEP 2 OF 2

Track the issue

Actions and status show where an issue has got to.



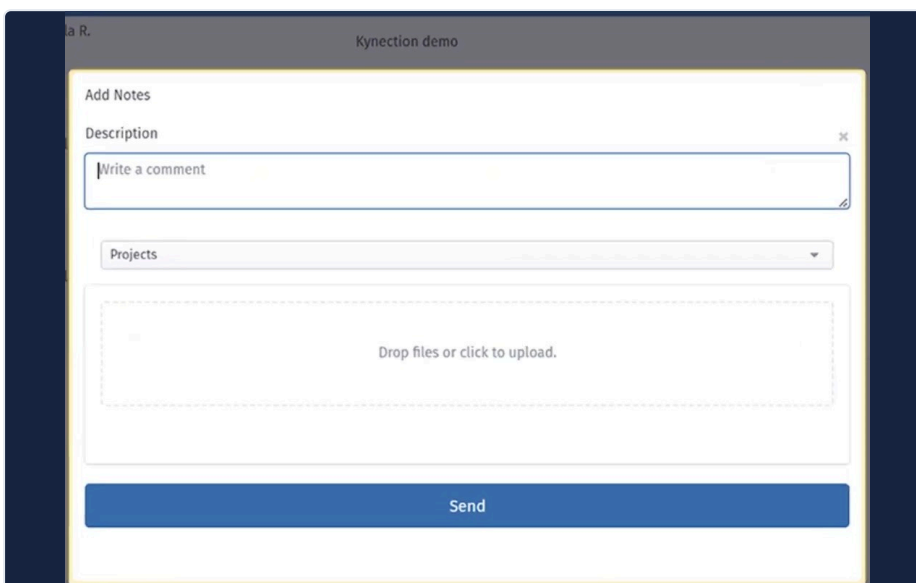
Created By	Module	Resolution Stage	Current Responsibility	Description	Completion Date	Completed By	Files
Irene Karla R. Beltran				Kynection demo			<button>View Form</button> <button>Add</button> <button>Mark</button> <button>Closed</button>
Irene Karla R. Beltran				Kynection demo			<button>View Form</button> <button>Add</button> <button>Mark</button> <button>Closed</button>
Irene Karla R. Beltran				Kynection demo			<button>View Form</button> <button>Add</button> <button>Mark</button> <button>Closed</button>
Irene Karla R. Beltran				Kynection demo			<button>View Form</button> <button>Add</button> <button>Mark</button> <button>Closed</button>
Irene Karla R. Beltran				Kynection demo			<button>View Form</button> <button>Add</button> <button>Mark</button> <button>Closed</button>

STEP 1 • 00:40 IN THE VIDEO

Review actions and status

Each issue carries its actions and current status, so progress is visible without chasing anyone.

CHAPTER 03 • STEP 1 OF 4



Kynection demo

Add Notes

Description

Projects

Drop files or click to upload.

Send

STEP 2 • 00:52 IN THE VIDEO

Add a note or attachment

Further notes and attachments can be added to an issue as it progresses.

CHAPTER 03 • STEP 2 OF 4

Track the issue

KYNECTION

HR

Karla Beltran

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

STEP 3 • 01:06 IN THE VIDEO

Read the issue record

The record keeps every note and file lodged against the issue.

CHAPTER 03 • STEP 3 OF 4

KYNECTION

Karla Beltran

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

STEP 4 • 01:07 IN THE VIDEO

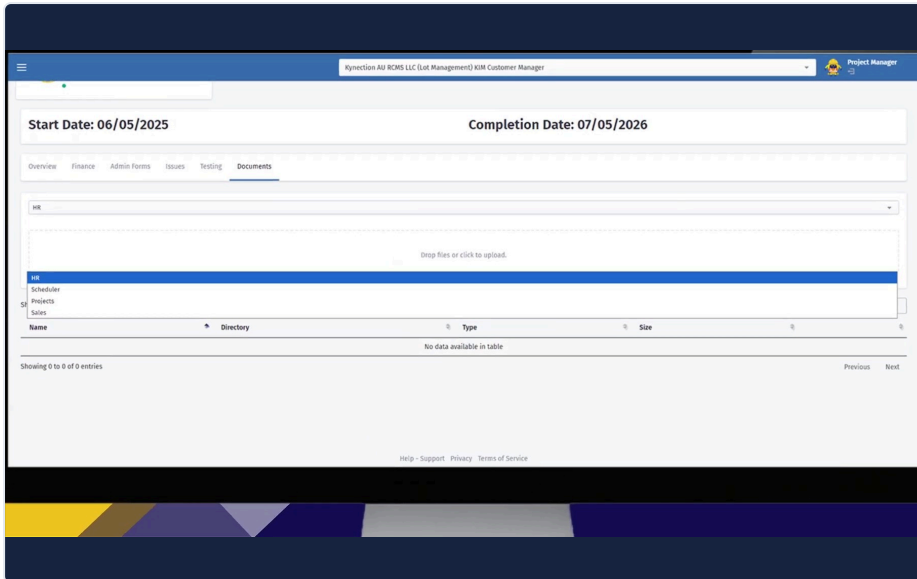
Check the files

Attachments list against the issue for anyone reviewing it.

CHAPTER 03 • STEP 4 OF 4

Tasks and documents

The rest of what the portal gives a client.

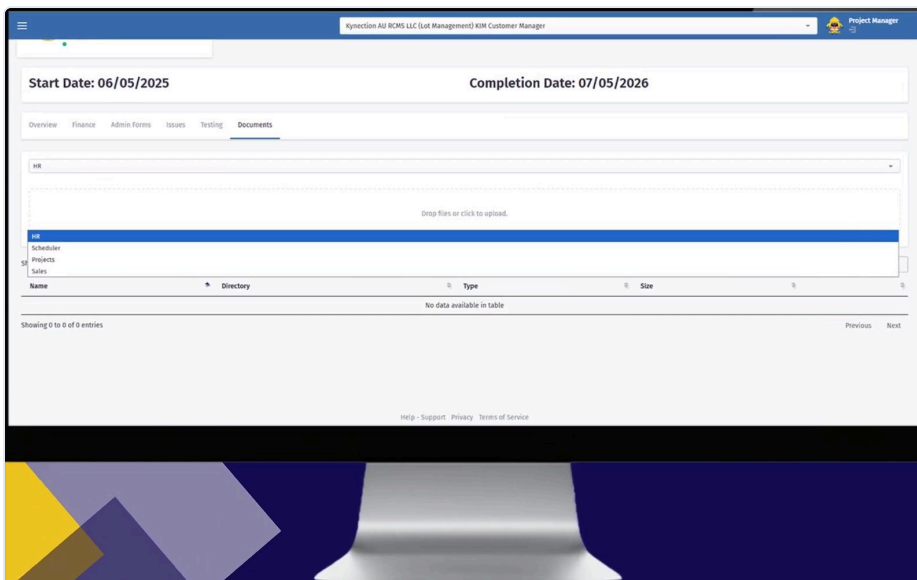


STEP 1 • 01:16 IN THE VIDEO

Check assigned tasks

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

CHAPTER 04 • STEP 1 OF 2



STEP 2 • 01:18 IN THE VIDEO

Open the project documents

Project documents are reachable from the same view.

CHAPTER 04 • 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.

BACK TO *Kustomer 01*

Register for and access a Kynection project

THE REST OF THE *KUSTOMER PORTAL*

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

MORE IN THIS MODULE

Kustomer 01 Register for and access a Kynection project
