Kaltura Customer Care Portal User Guide

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Contents

Preface

This preface contains the following topics:

- About this Guide
- Audience
- Document Conventions

About this Guide

This guide presents the functionality and usage of Kaltura Customer Portal, and describes the Customer Care workflows and procedures that are designed to lower response time and ensure customer satisfaction.

NOTE: Refer to the official and latest product release notes for last-minute updates. Technical support may be obtained directly from: Kaltura Customer Care.

Contact Us:

Please send your documentation-related comments and feedback or report mistakes to knowledge@kaltura.com. We are committed to improving our documentation, and your feedback is important to us.

Audience

This guide is intended for users who were granted access to the Kaltura Customer Portal and can open cases and correspond with Kaltura's Customer Care. Currently, the beta version of the portal is open to a limited group of experienced Kaltura customers. Kaltura is interested in receiving their feedback so that the portal can be fine-tuned before making it available to all Kaltura customers.

Because you are one of our most active and strategic customers, you were handpicked to participate in this pilot.

Document Conventions

Kaltura uses the following admonitions:

- Note
- Workflow

NOTE: Identifies important information that contains helpful suggestions.

Workflow: Provides workflow information.

1. Step 1
2. Step 2

SECTION 1

Overview of the Kaltura Customer Portal

The Kaltura Customer Portal provides the following functionality:

- Centralized management for all your Customer Care cases
- Transparency regarding case status and priority
- Easy-to-access single point of contact for all Customer Care-related correspondences
- Access to an integrated knowledge center, featuring tips and techniques to achieve better performance, FAQs, and troubleshooting guides
- Direct access to the organization for a greater sense of involvement and control

Priority Setting

One of the main advantages of the Kaltura Customer Portal over other communication methods with Kaltura Customer Care, is the ability to convey the priority and sense of urgency of your case.

After a case is opened, its priority is taken into consideration and your case is handled accordingly. Please note that in addition to priority, other parameters such as the issue's scope, scale and severity also affect the triage process. Priority levels include the following:

- **Essential priority** - The problem causes a major production flow to shut down, and the operator is prevented from performing a major part of work needed using the Kaltura platform. No workaround exists, and the customer must receive immediate resolution of this problem.
- **High priority** - The problem causes a major production flow to shut down, and the operator cannot perform a major part of the work needed using the Kaltura platform.
- **Medium priority** - The problem causes partial unavailability of a service, its features, and functions. The customer can continue to function without this service.
- **Low priority** – The issue reported by the customer has a low impact on business flow. Low priority items include general questions, requests for enhancement, cosmetic UI bugs, etc.

Case Status

Use the 'Create Case' button to open your case with Kaltura Customer Care. You can follow the current status of investigation by reviewing the case status, as defined by one of the following:

Open Statuses

- New - your case was accepted and is pending investigation.
- New Assigned - the case is assigned to a Kaltura support engineer, and will be reviewed shortly.
- In Progress - the case is currently under investigation by Kaltura support engineers or experts.
- Pending Your Response - Customer Care replied to the case and requested further information from you.

If you would like additional updates, please feel free to reach out to Kaltura Customer Care by replying to the case.

After a case is closed, it receives one of the following statuses:

- Closed - Solution Suggested - Customer Care offered a solution to your case. The case is now pending your approval of the solution suggested.

- Closed – Resolved - You are satisfied with the solution offered to the case and no longer require Customer Care's assistance. With your confirmation, the case is marked as permanently closed.

Account Hierarchies

Depending on your organization's structure, your account can be one of the following types:

- Parent account – contains sub-accounts. Sub-accounts often characterize inner relationships of corporations and their departments, universities consortiums and their academic departments, etc.
- Sub-account – has a parent account (The parent account may have more parallel sub-accounts.)
- Standard account – stands on its own. Has no parent account or parallel sub-accounts.

Permissions Matrix

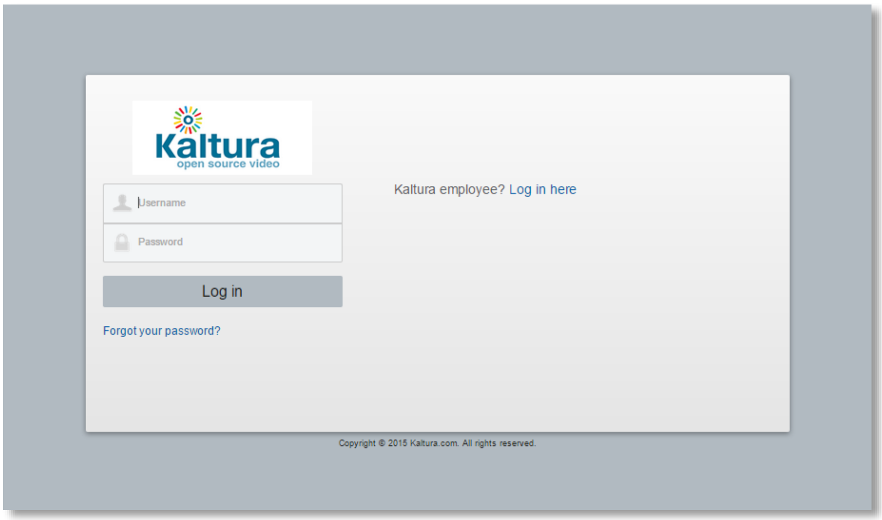
The following table presents the permissions matrix for the various accounts.

Account Type / Functionality	Accounts	Cases
Parent account	View/edit parent account View/edit sub-accounts	View/create/edit sub-accounts' cases * Can only open cases on behalf of its sub-accounts
Sub-account	View/edit its account	View/create/edit its account cases View/edit parallel sub-accounts cases
Standard account	View/edit its account	View/create/edit its cases

Getting Started

Log into the Kaltura Customer Portal

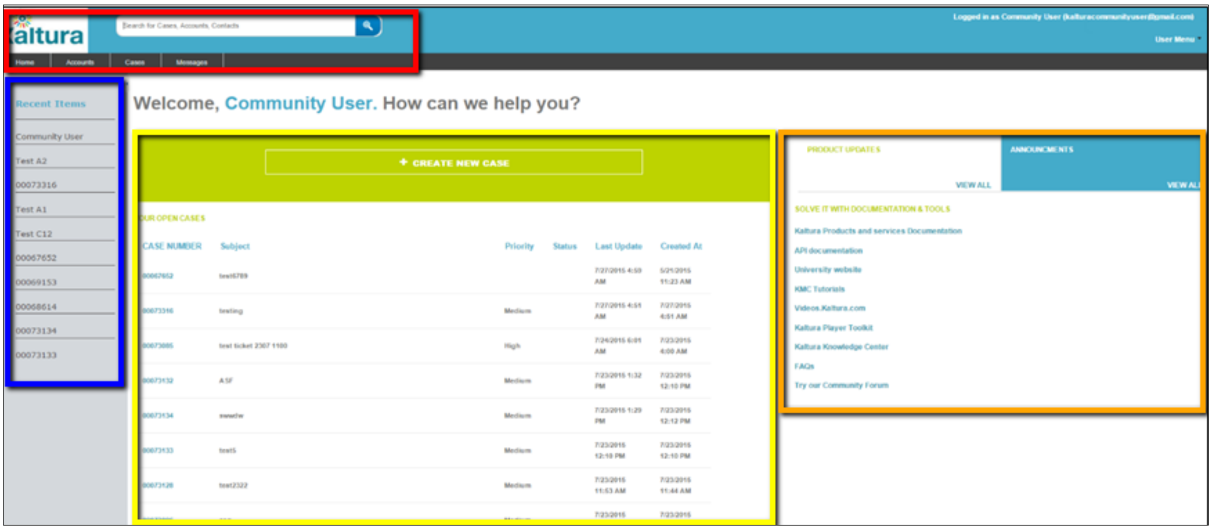
1. Go to https://kaltura2.force.com/CCPT/login.
2. Log in using the credentials in the "Welcome to Kaltura Customer Portal" registration email you received. The login screen appears as follows:



Customer Portal Home Page

After you have logged in successfully, the portal home page appears, and contains the following 4 areas:

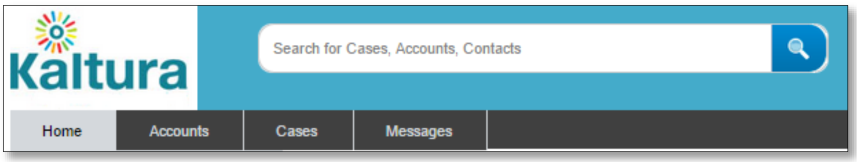
- Navigation (red box)
- Recent Items (blue box)
- Main Cases (yellow box)
- Knowledge and Documentation (orange box)



Navigation

Use the Navigation tabs at the top of the page to access the portal's following areas:

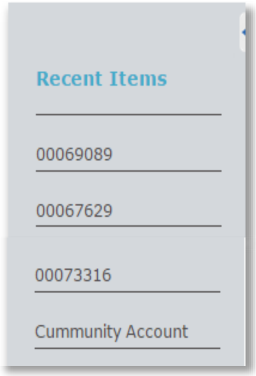
- Home – accesses the homepage and provides an overview of your cases, recent items, and knowledge-based articles
- Accounts – presents account and contact information
- Cases – presents the status of open, closed, and recent cases
- Messages – provides access to product updates, announcements



You can also use the Search field in the Navigation area to search for cases, accounts, or contacts.

Recent Items

The Recent Items area on the left side of the home page tracks your movement in the system and enables you to quickly return to recently viewed cases, accounts, and users.



Click on any of the items in the list to view details about an item previously viewed.

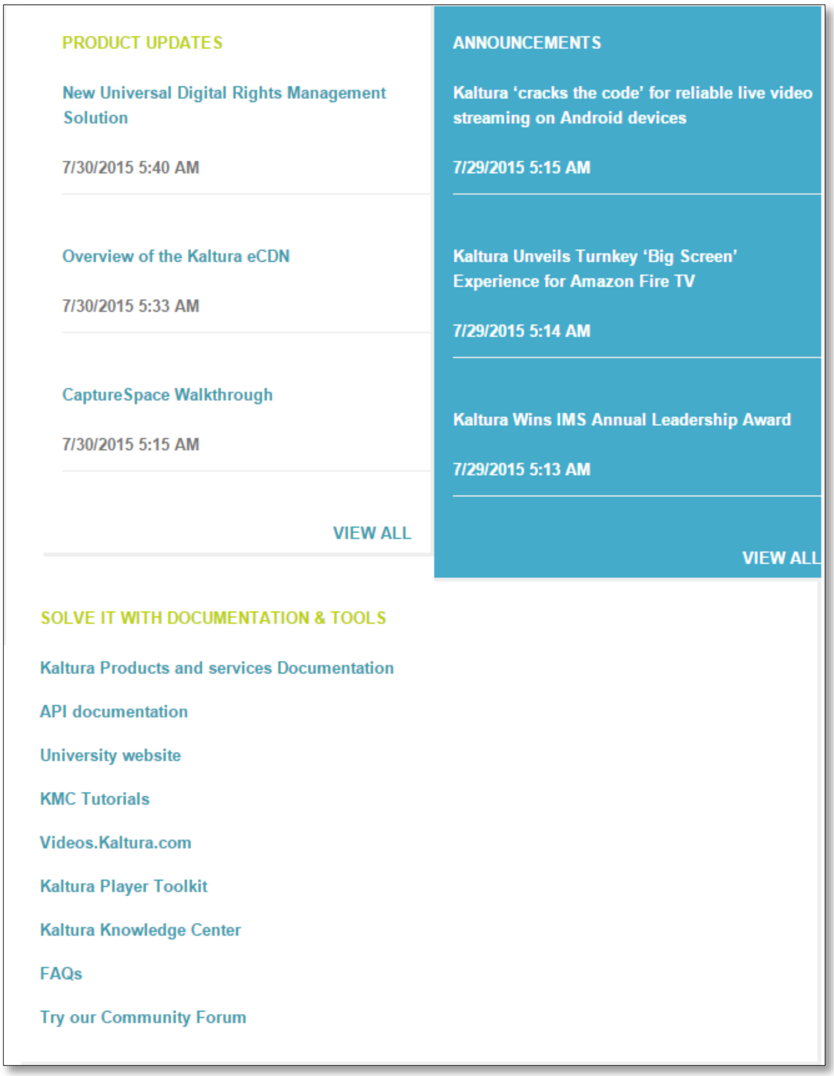
Main Cases

Use the Main Cases area as a quick way to create new cases and manage your open cases with Customer Care, including case review and updates.

Clicking on the "Create New Case" button opens the New Case window.

Knowledge and Documentation

The Knowledge and Documentation area on the right side of the homepage contains links to Kaltura's Knowledge Center documentation database, product updates regarding recent releases, general announcements about availability and operations, and reminders for Kaltura users.

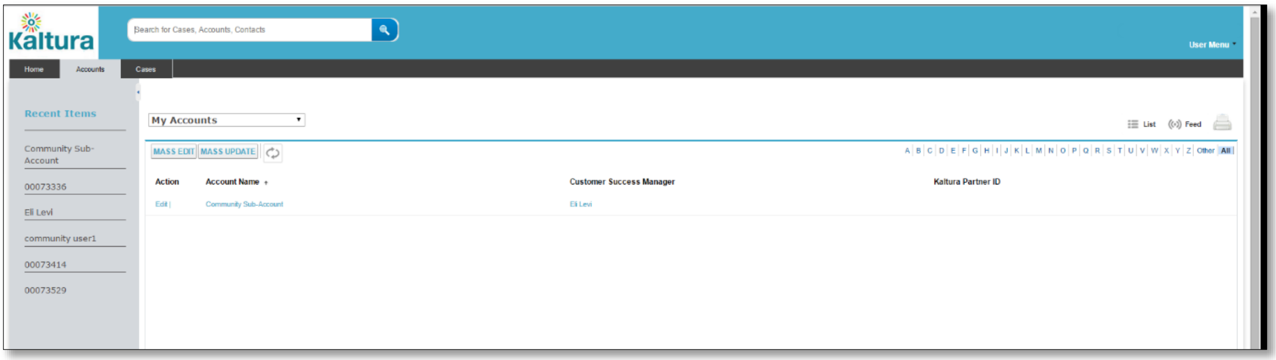


Customer Portal Tabs

Accounts Tab

Use the Accounts tab to view the accounts that belong to you. By default, you are presented with your previously chosen view.

1. Click the arrow next to My Accounts.
2. Choose the account you want to view from the drop-down list.
3. Click GO. Your account information appears.



Account View

To view account details, click the account name. The following details appear:

- Account information – name of Customer Success Manager, phone, fax, website, etc. Note that most of the fields are read-only, and can be modified by your Customer Success Manager.
- Shipping Address – shipping address, region, sub-region.
- Contacts – lists all the account's contacts. Note that some contact details are read-only. Read-only fields can only be modified by your Customer Success Manager.
- Cases – the account's open and closed cases. To view all cases, click *Go to list.*

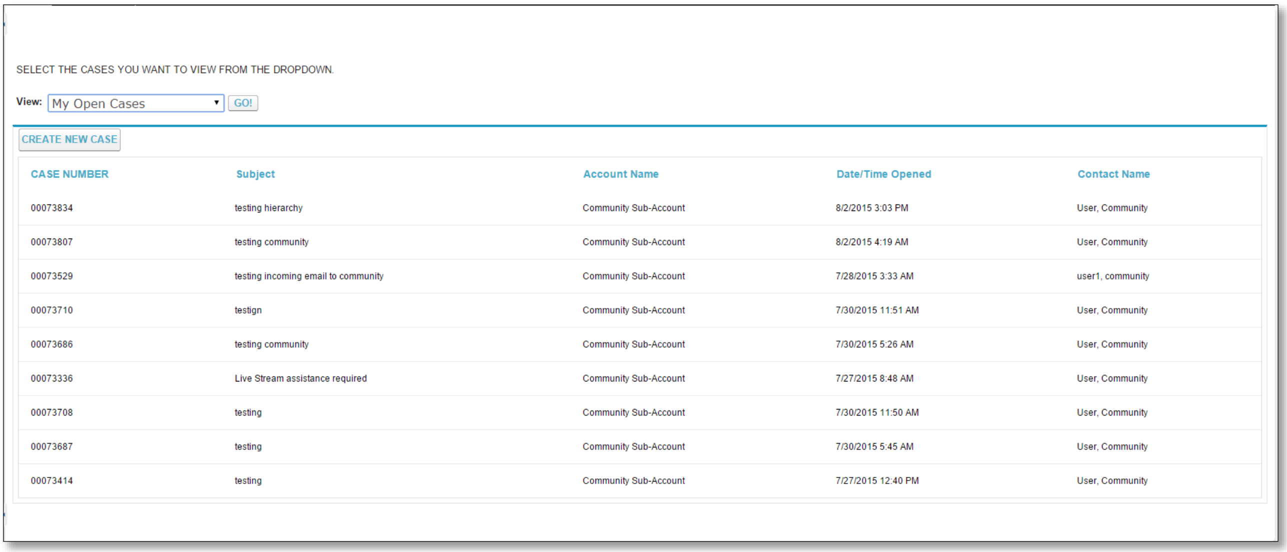
Cases Tab

Case Views

Use the Cases tab to view the cases reported by you or others in your accounts, according to your account's hierarchy permissions. By default, you are presented with your previously chosen view.

To change your view:

1. Click the arrow next to My Open Cases.
   A drop-down list opens and presents you with the following choices:
   a. All My Cases – presents all open and closed cases created by the logged-in user.
   b. My Account's Open Cases – presents all open cases for your account.
   c. My Closed Cases - presents all closed cases for your account.
   d. My Open Cases - presents all open cases for your account.
2. Select the type of cases to view, and click GO.


SELECT THE CASES YOU WANT TO VIEW FROM THE DROPDOWN.

View: My Open Cases GO!

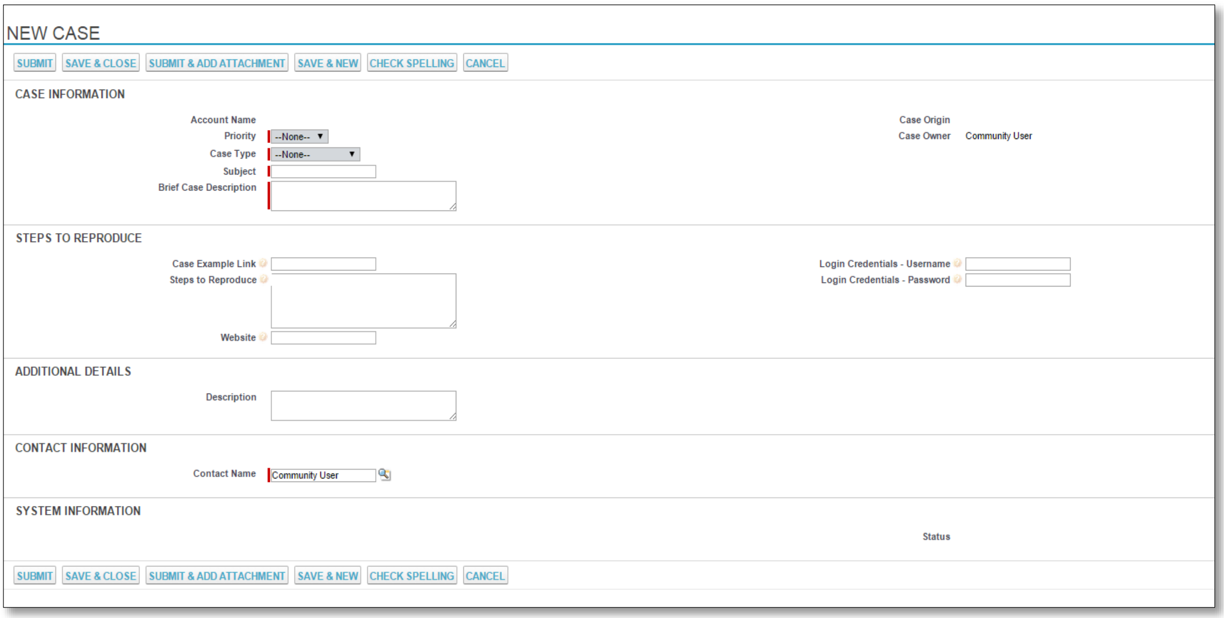
CREATE NEW CASE

CASE NUMBER	Subject	Account Name	Date/Time Opened	Contact Name
00073834	testing hierarchy	Community Sub-Account	8/2/2015 3:03 PM	User, Community
00073807	testing community	Community Sub-Account	8/2/2015 4:19 AM	User, Community
00073529	testing incoming email to community	Community Sub-Account	7/28/2015 3:33 AM	user1, community
00073710	testign	Community Sub-Account	7/30/2015 11:51 AM	User, Community
00073686	testing community	Community Sub-Account	7/30/2015 5:26 AM	User, Community
00073336	Live Stream assistance required	Community Sub-Account	7/27/2015 8:48 AM	User, Community
00073708	testing	Community Sub-Account	7/30/2015 11:50 AM	User, Community
00073687	testing	Community Sub-Account	7/30/2015 5:45 AM	User, Community
00073414	testing	Community Sub-Account	7/27/2015 12:40 PM	User, Community

Create a New Case

To create a new case:

- Click the Create New Case button in one of the following locations:
  a. On the homepage screen
  b. In the Account view
  c. In the Cases view
  The New Case screen is displayed.



New Case Sections

Fill in the following information:

1. In the Case Information section, enter the basic details for your case:
   a. Account Name. If your Kaltura account configuration is set as a hierarchy, choose the account to which this case refers.
   b. Priority. Define the effect of the reported case according to priorities defined in the section *Priority Setting*.
   c. Case Type. Define whether your case is a *How-To* question or an *Issue*.
   d. Subject and Brief Case Description. Provide a brief description of your case.

   The first phase of investigation at Customer Care attempts to reproduce the behavior you are experiencing.
2. In the Steps to Reproduce section, provide the following details:
   a. Case example link/ website. This is a link to a page where the reported behavior appears. For example, a test page, your site, etc.
   b. Login credentials (username & password). In the case where access to the site or environment requires credentials, please enter them in these fields. These credentials are saved securely in the sales force cloud over SSL.
3. In the Additional Details area, provide any further information you want to share with Kaltura Customer Care.
4. In the Contact Information area, if you are opening the case on behalf of a different user in your account, click the magnifying glass icon on the right-hand side of this field, and choose the contact's name. By default, this field is populated with the name of the user who logged in.

Messages Tab

There are 2 types of messages in the Messages tab:

- Product Updates
- Announcements

Product Updates

The Product Updates section contains links to the Kaltura documentation database, the Knowledge Center, as well as product updates regarding recent releases.

Announcements

The Announcements section contains the latest Kaltura product news, general announcements regarding product availability and operational, and reminders to Kaltura users.