IT Support Knowledge Base

Account Management

Password Reset Procedures

If you've forgotten your password, follow these steps to reset it:

1. Navigate to the login page
2. Click on "Forgot Password" link below the login button
3. Enter your registered email address
4. Check your email inbox for a password reset link (valid for 24 hours)
5. Click the link and create a new password that meets security requirements: minimum 8 characters, at least one uppercase letter, one number, and one special character
6. If you don't receive the email within 5 minutes, check your spam folder or contact the support desk

Note: Password reset links expire after 24 hours for security purposes. Multiple failed login attempts (more than 5) will temporarily lock your account for 30 minutes.

Account Settings Configuration

Users can modify the following account settings through the dashboard:

- **Profile Information:** Update name, email, phone number, and profile picture
- **Notification Preferences:** Configure email and SMS alerts for account activities
- **Security Settings:** Enable two-factor authentication, manage trusted devices, and view login history
- **Privacy Controls:** Manage data sharing preferences and visibility settings

To access these settings, log in to your account and click the "Settings" icon in the top-right corner of the dashboard.

Subscription Plans & Billing

Available Plans

Three subscription tiers are available:

Basic Plan ($9.99/month)

- Access to core features
- 5 GB cloud storage
- Email support (48-hour response time)
- Single user account
- Monthly invoices

Pro Plan ($29.99/month)

- All Basic features plus:
- 50 GB cloud storage
- Priority email and chat support (12-hour response time)
- Advanced analytics dashboard
- Up to 5 team members
- API access with 1,000 calls/day
- Quarterly business reviews

Enterprise Plan (Custom pricing)

- All Pro features plus:
- Unlimited cloud storage
- 24/7 dedicated support with 2-hour response time
- Custom integrations and white-labeling
- Unlimited team members
- Advanced API access (unlimited calls)
- Service Level Agreement (SLA) with 99.9% uptime guarantee
- Dedicated account manager

Plan Upgrades and Downgrades

You can change your subscription plan at any time:

- **Upgrades:** Take effect immediately. You'll be charged a prorated amount for the remainder of the current billing cycle.

- **Downgrades:** Take effect at the start of the next billing cycle to ensure you retain access to features you've paid for.
- To upgrade or downgrade, navigate to Settings > Billing > Change Plan and select your desired tier.

Invoice and Payment Information

Invoices are generated automatically based on your billing cycle:

- Monthly subscribers receive invoices on the same date each month
- Annual subscribers receive invoices once per year
- All invoices are sent to your registered email address within 24 hours of generation
- Invoices can be downloaded from the Billing section under Settings
- Payment methods accepted: Credit/Debit cards (Visa, Mastercard, American Express), PayPal, and bank transfers for Enterprise customers

Missing Invoice? If you haven't received an invoice, first check your spam folder. Invoices are also accessible in your account dashboard under Settings > Billing > Invoice History. If the invoice is still missing, contact billing support with your account details and the billing period in question.

Payment Failures and Account Suspension

If a payment fails:

1. You'll receive an email notification immediately
2. The system will retry the payment after 3 days
3. A second retry occurs after 7 days
4. If all attempts fail, your account will be suspended after 10 days
5. Suspended accounts retain data for 30 days before permanent deletion

To resolve payment failures, update your payment method in Settings > Billing > Payment Methods.

Technical Support & Troubleshooting

Common Technical Issues

Login Problems

- **Issue:** Can't log in with correct credentials
- **Solution:** Clear browser cache and cookies, try a different browser, or use incognito/private mode. Ensure caps lock is off when entering your password.

Slow Performance

- **Issue:** Dashboard loading slowly or timing out
- **Solution:** Check your internet connection speed (minimum 5 Mbps recommended). Close unnecessary browser tabs. Disable browser extensions that might interfere. Try accessing during off-peak hours if issues persist.

File Upload Failures

- **Issue:** Files not uploading or uploads timing out
- **Solution:** Ensure file size doesn't exceed your plan's limit (Basic: 50MB per file, Pro: 500MB per file, Enterprise: 5GB per file). Check that file format is supported. Verify you haven't reached storage capacity. Try using a wired connection instead of Wi-Fi for large files.

API Connection Errors

- **Issue:** API calls returning authentication errors
- **Solution:** Verify your API key is active and hasn't expired. Check that you haven't exceeded your daily API call limit. Ensure proper authentication headers are included in requests. Review API documentation.

Contact Support

For issues not covered in this knowledge base:

- **Email Support:** Available for all users (Response times vary by plan)
- **Live Chat:** Available for Pro and Enterprise customers Monday-Friday, 9 AM - 6 PM
- **Phone Support:** Enterprise customers only
- **Emergency Support:** Enterprise customers with critical issues have access to 24/7 support

When contacting support, please include:

1. Your account email address
2. Detailed description of the issue

3. Steps to reproduce the problem
4. Screenshots or error messages (if applicable)
5. Browser and operating system information

Data Security & Privacy Policies

Data Protection

Industry-standard security measures are implemented:

- All data encrypted in transit (TLS 1.3) and at rest (AES-256)
- Regular security audits and penetration testing
- SOC 2 Type II certified
- GDPR and CCPA compliant
- Regular automated backups every 6 hours
- Data centers with geographic redundancy

Data Retention and Deletion

- Active accounts: Data retained indefinitely while subscription is active
- Canceled accounts: Data retained for 30 days, then permanently deleted
- Users can request immediate data deletion by contacting privacy support
- Deleted data cannot be recovered after the retention period

Privacy Commitments

- Personal data is never sold to third parties
- Data is used only to provide and improve services
- Marketing communications can be opted out at any time
- Users can request a complete copy of their data within 30 days

Product Features Guide

Core Features (All Plans)

Dashboard Overview
The main dashboard provides a centralized view of account activities, recent documents, storage usage, and quick access to frequently used features.

Document Management

- Upload, organize, and share documents with team members
- Version control automatically tracks document changes
- Full-text search across all uploaded documents
- Support for 50+ file formats including PDF, DOCX, XLSX, PPT, images, and more

Collaboration Tools

- Real-time document collaboration with team members
- Comments and annotations on documents
- @mention notifications to alert specific users
- Activity feed showing all team actions

Advanced Features (Pro and Enterprise)

Analytics Dashboard
Track key metrics including:

- User activity and engagement rates
- Storage utilization trends
- API usage statistics
- Team collaboration patterns
- Custom report generation

API Integration
Developers can integrate services into their applications using the RESTful API. Full documentation available with code examples in Python, JavaScript, Java, and Ruby.

Automation Workflows
Create custom automation rules:

- Automatic file organization based on type or tags
- Scheduled reports sent via email
- Trigger notifications based on specific events
- Integration with third-party tools via webhooks

Frequently Asked Questions

Q: How do I add team members to my account?
A: Go to Settings > Team Management > Invite Members. Enter their email addresses and assign roles (Admin, Editor, or Viewer). They'll receive an invitation email to join your workspace.

Q: Can I use the service on mobile devices?
A: Yes, mobile apps are available for iOS (requires iOS 14+) and Android (requires Android 9+). Download from the App Store or Google Play Store.

Q: Is there a file size limit?
A: Yes, limits vary by plan - Basic: 50MB per file, Pro: 500MB per file, Enterprise: 5GB per file. Total storage limits apply to all plans.

Q: How do I cancel my subscription?
A: Navigate to Settings > Billing > Cancel Subscription. Your access will continue until the end of your current billing period. You can reactivate anytime within 30 days without losing data.

Q: Are there student or nonprofit discounts available?
A: Yes! Students with valid .edu email addresses receive 50% off Pro plans. Registered nonprofits receive 30% off all plans. Contact sales to verify eligibility.

Q: What happens if I exceed my storage limit?
A: You'll receive notifications at 80% and 95% capacity. At 100%, you can't upload new files until you delete content or upgrade your plan. Existing files remain accessible.

Q: How long does it take to upgrade my plan?
A: Plan upgrades take effect immediately. You'll gain instant access to all features of your new plan and will be charged a prorated amount for the remainder of your billing cycle.

Q: Can I switch from monthly to annual billing?
A: Yes, you can switch billing frequencies at any time. Annual billing offers a discount compared to monthly subscriptions. Contact billing support or change this in Settings > Billing > Billing Cycle.