

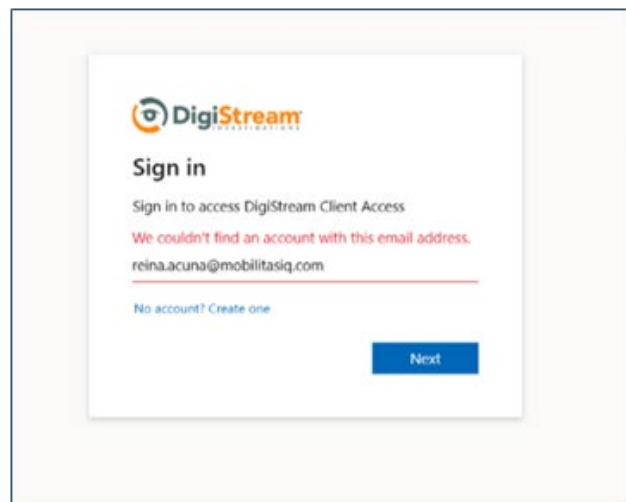
CUSTOMER PORTAL

TROUBLESHOOTING GUIDE: CUSTOMER

ERROR UPON LOGIN

1. If the Client receives an error message when entering their email address, send a ticket to ticket@digistream.com.
2. Be sure to include the following information to help speed up the troubleshooting process:
 - a. Client's name
 - b. Client's Email address that they used to register with the Customer Portal
 - c. Any screenshots of the error the client received

Examples of errors:

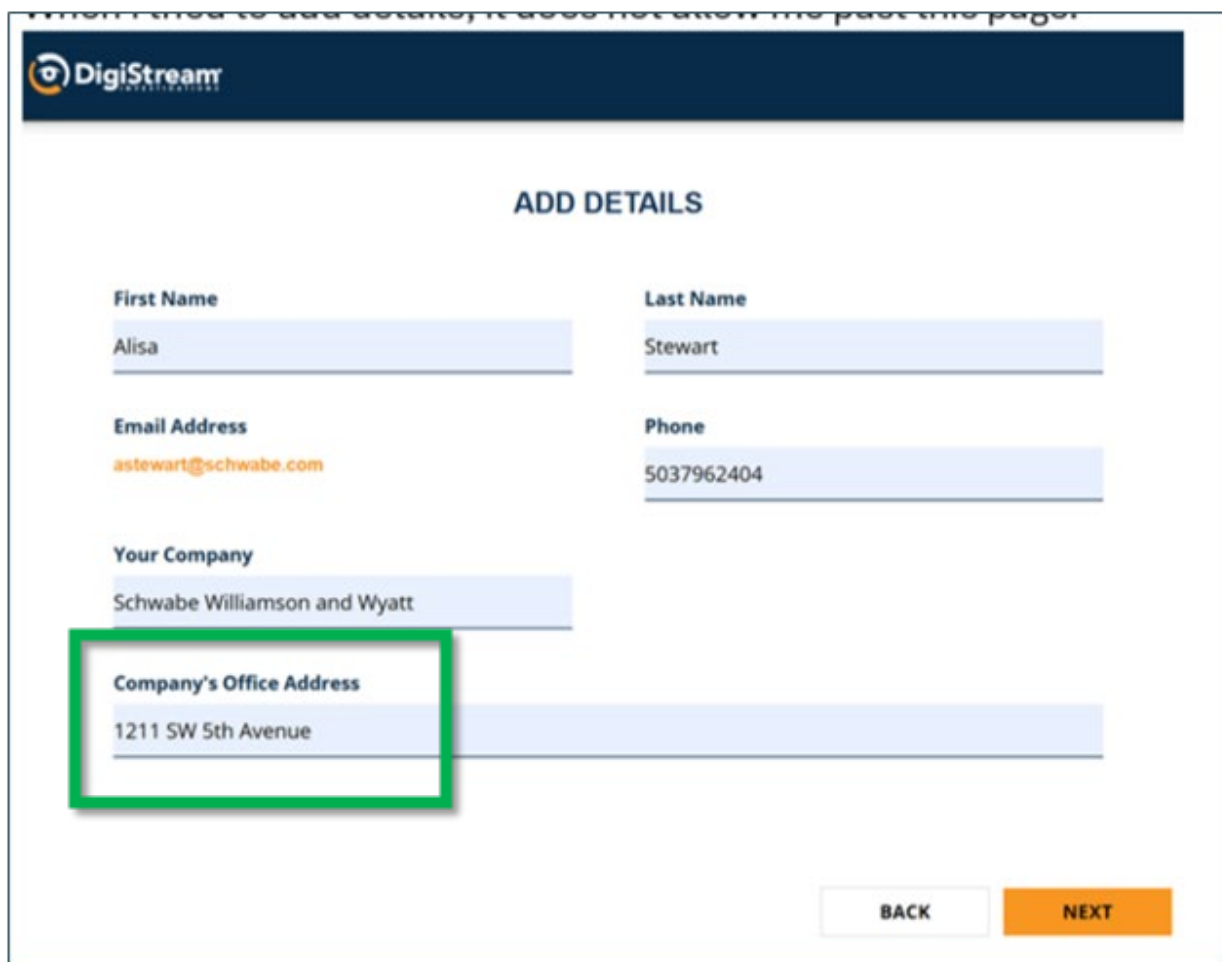


ERROR WHEN REGISTERING PROFILE

3. If the Client reaches the “Add Details” page and is unable to proceed, they likely have not entered all of the mandatory information needed to complete the registration process. The information they need includes:

- a. First Name
- b. Last Name
- c. Phone number
- d. Company Name
- e. Physical Company Address

This needs to be a full address. If they only have the street address or tried to enter a PO box they will not be able to proceed to the next page.



When I tried to add details, it does not allow me past this page.

DigiStream
INVESTIGATIONS

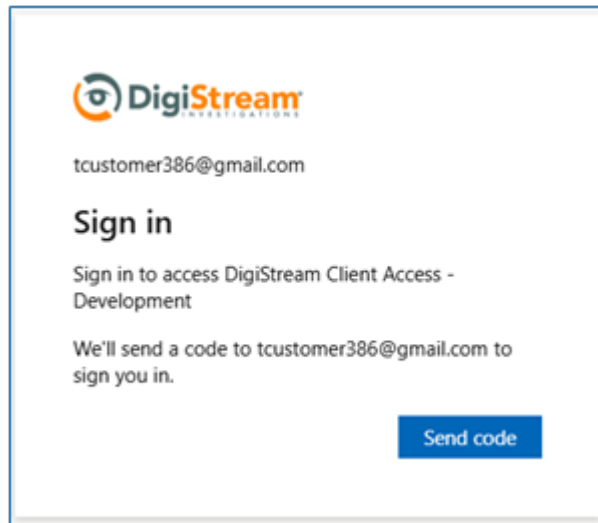
ADD DETAILS

First Name Alisa	Last Name Stewart
Email Address astewart@schwabe.com	Phone 5037962404
Your Company Schwabe Williamson and Wyatt	
Company's Office Address 1211 SW 5th Avenue	

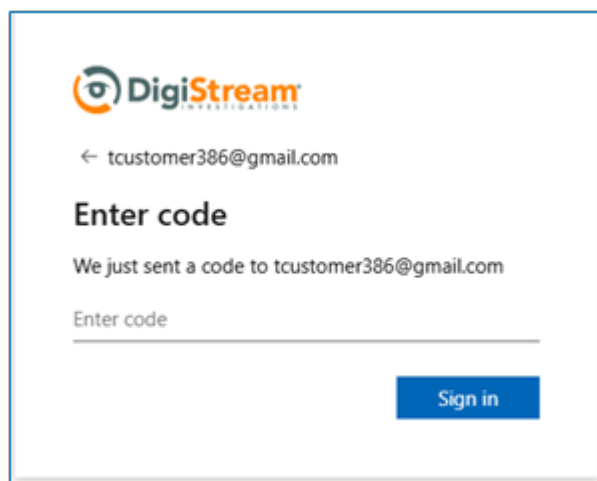
BACK **NEXT**

SENDING AND RECEIVING OTP

1. Once they have entered their email and have successfully registered their information they should be taken to a screen that prompts them to send a code to their email.



Once they click “Send Code” they’ll be routed to a screen that allows them to enter that code and Sign in.



2. If they click “Send Code” for the first time and nothing happens, try having them click it again.

- a. Often times if they are the first person to access the Customer Portal in an hour or so the Code feature needs a second to turn back on and requires a second click.
2. If they have clicked Send Code multiple times and they do not see the screen that allows them to enter the code, submit a ticket at ticket@digistream.com.
3. If they have made it to the page that allows them to enter the code, but they haven't received the code in their inbox, ask them to do the following:
 - a. Confirm the date and time they clicked the "Send Code" button. Ask them to do it again if they don't remember.
 - b. Check their spam/junk folder
 - c. Confirm they don't have any rules setup in their mailbox that filters out emails from donotreply@digistream.com
 - d. Confirm with their IT department that the email isn't quarantined or blockedYou can also submit a ticket to ticket@digistream.com and have the IT department confirm whether the OTP email was successfully sent from the donotreply@digistream.com mailbox to the client's email address.

ERROR WHEN SUBMITTING A REFERRAL

1. If the client has been able to login, but is unable to submit a referral, gather the following information and submit a ticket to IT:
 - a. Client's name
 - b. Client's Email address that they used to register with the Customer Portal
 - c. Any screenshots of the error the client received
 - d. The date/time they received the error. If they don't remember, ask them to recreate the error again and take note of the time.