

How to use the Engage Customer Success Portal

Logging in:

Once you access the URL you will be asked to set up a login.

A screenshot of a login form titled "Sign in to Engage Client Success Portal". The form includes an "Email" field with the text "leestark1991@gmail.com", a "Password" field with masked characters ".....", and a blue "Sign in" button. Below the button is a link "Forgot my password". At the bottom, there is a red-bordered box containing the text "New to Engage Client Success Portal ? Sign up". Below this box is the text "Have you emailed us? Get a password" and a paragraph: "If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though." A close button (X) is in the top right corner of the form.

We suggest that you set up one generic user so that other people within your organization can see tickets that have been raised.

If you would like individual users please note that another people of your business will not be able to see any tickets you have raised.

Submitting a request:

Once you are on the homepage in the top right corner with be the “submit a request” button, this is how you will raise a ticket to the Contis Client Success Team.



You will then be presented with a form to complete:

Submit a request

Subject

Query Reason

Name of Credit Union

Please provide the name of the Credit Union you are contacting us from

Customer Account Number (optional)

Description

T B I [List Icons] [Link Icon] [Image Icon] [More Icons]

Please enter the details of your request. A member of our support staff will respond as soon as possible.

Attachments (optional)

Add file or drop files here

Submit

Please complete the form with as much information as possible then click submit.

Once submitted you will then get a ticket number and an email to confirm receipt of your query.

Updating or checking on tickets I have raised:

If you need to check up on a ticket or add a further update to a ticket please click your name in the top right hand corner of the page and select "Requests"



You will then be able to see all request you have made and their current status, please note there is a small delay between submitting a request and it showing on this page.

