



ARBITRATION FORUMS, INC.
Membership driven. Innovation focused.

Member Support Portal Navigation Guide

February 2025

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Member Support Portal

The Member Support Portal is an online platform that allows members to access information, troubleshoot issues, and resolve problems independently without the need to involve an AF Member Services Representative. This centralized hub includes a knowledge base with guided questions to arrive at answers. It also provides the ability to ask a question or report an issue directly without the need for a phone call or email.

Member Support Portal Benefits

The benefits of the Member Support Portal include:

- The ability to check real-time status of an inquiry and receive update notifications on submitted inquiries.
- Automated workflows that route issues to the correct support group quickly and efficiently to achieve faster turnaround times.
- A knowledge base with step-by-step guidance and solutions.
- Performance analytics that help the AF Support team identify trends to drive further service improvements for members.

Accessing the Member Support Portal

After logging in, click **Contact** on the AF home page — this takes you to the home screen for the Member Support Portal. The portal shows tickets associated with your log in credentials.



Access is only granted after completing the log in process.



Home Screen

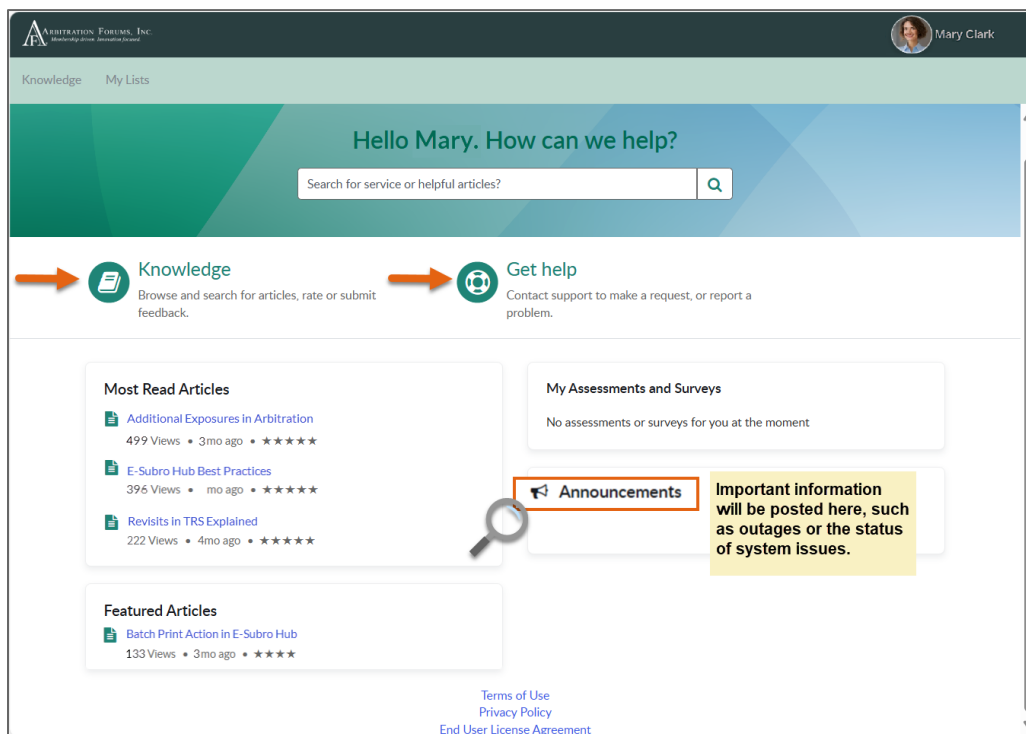
Highlights of the home screen include:

- A search bar to locate a particular service or helpful articles.
- Access to a knowledge base.
- The opportunity to easily contact support to make a request or report a problem.

Knowledge and **Get Help** are highly visible near the top of the page. Simply click the appropriate image link — the book for knowledge or the life preserver — to get help.

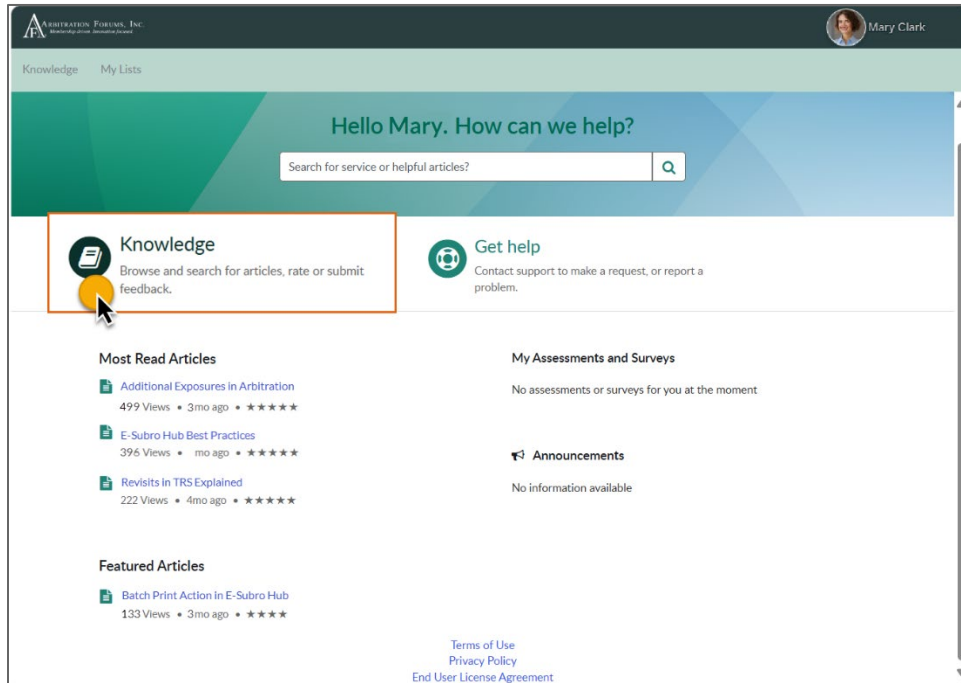
Most Read Articles and **Featured Articles** are linked below on the left; **My Assessments and Surveys**, plus **Announcements**, appear on the bottom right.

Announcements share important information, such as service outages or the status of system issues. Please check here before reporting a potential technical issue.

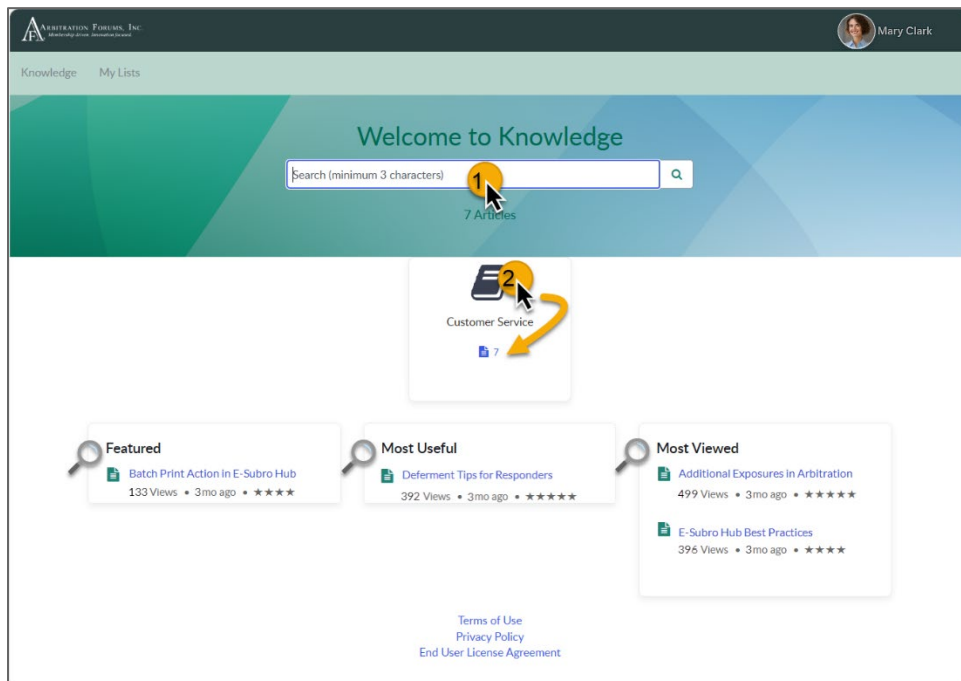


Knowledge

Click the image link (book) next to **Knowledge**; the Knowledge page appears.

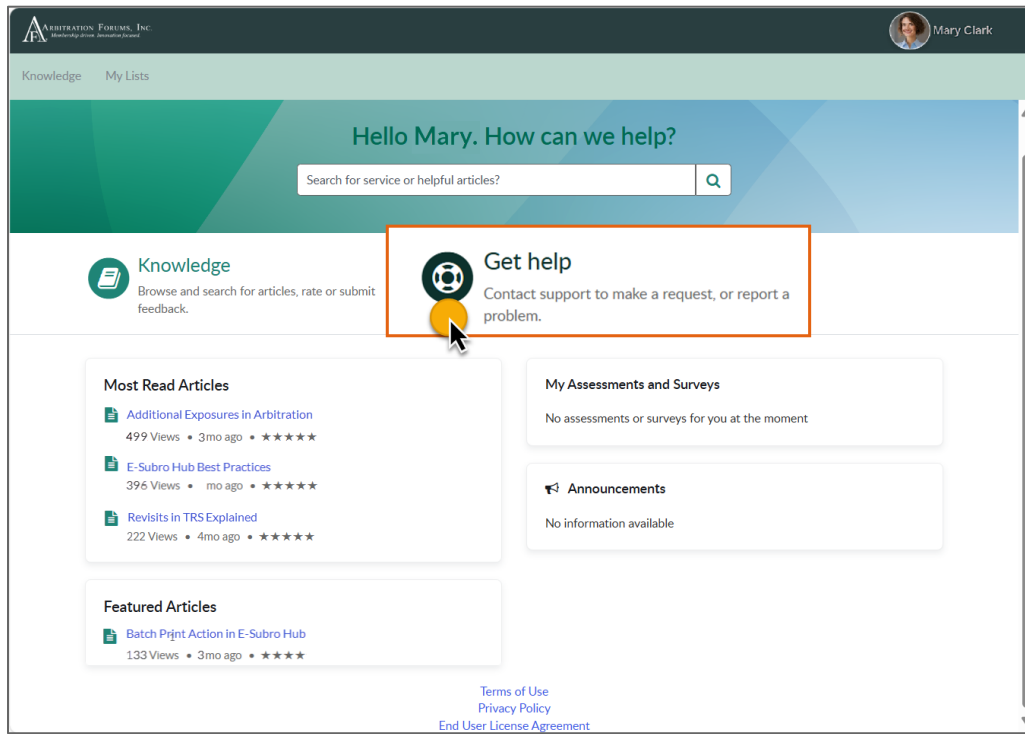


Use the search bar (1) to locate content. Click the book or the earmarked page (2) to get the result shown in the second image that follows. Easily access **Featured**, **Most Useful**, and **Most Viewed** content via links.

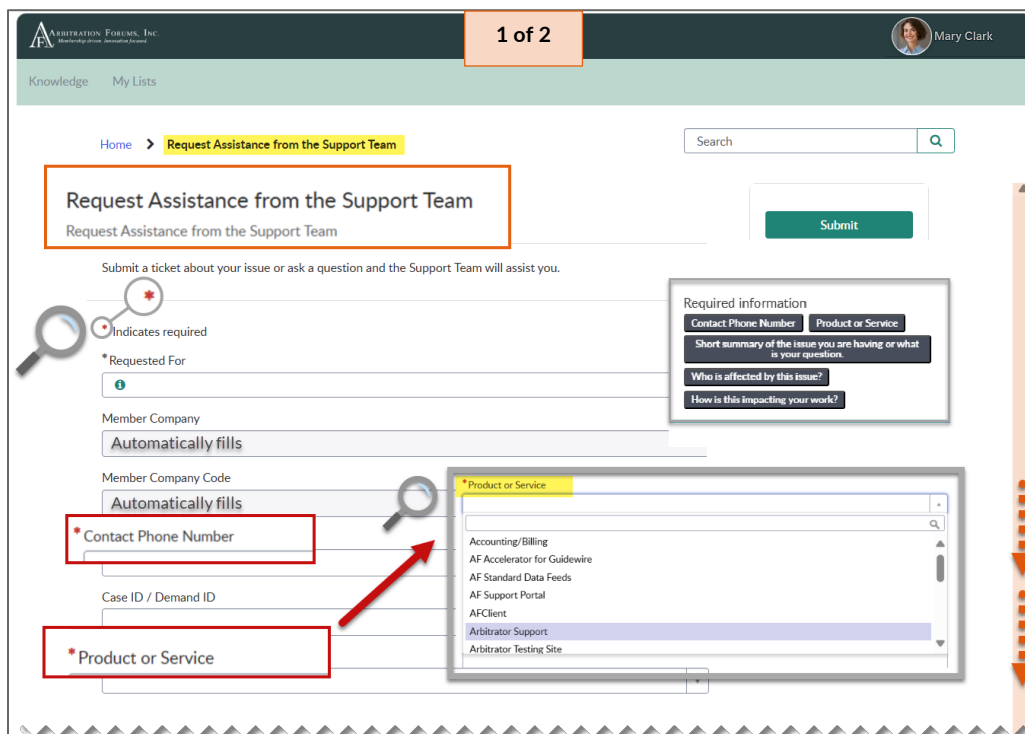


Get Help (Support Request)

Click **Get Help** (life preserver) to make a request or report a problem.



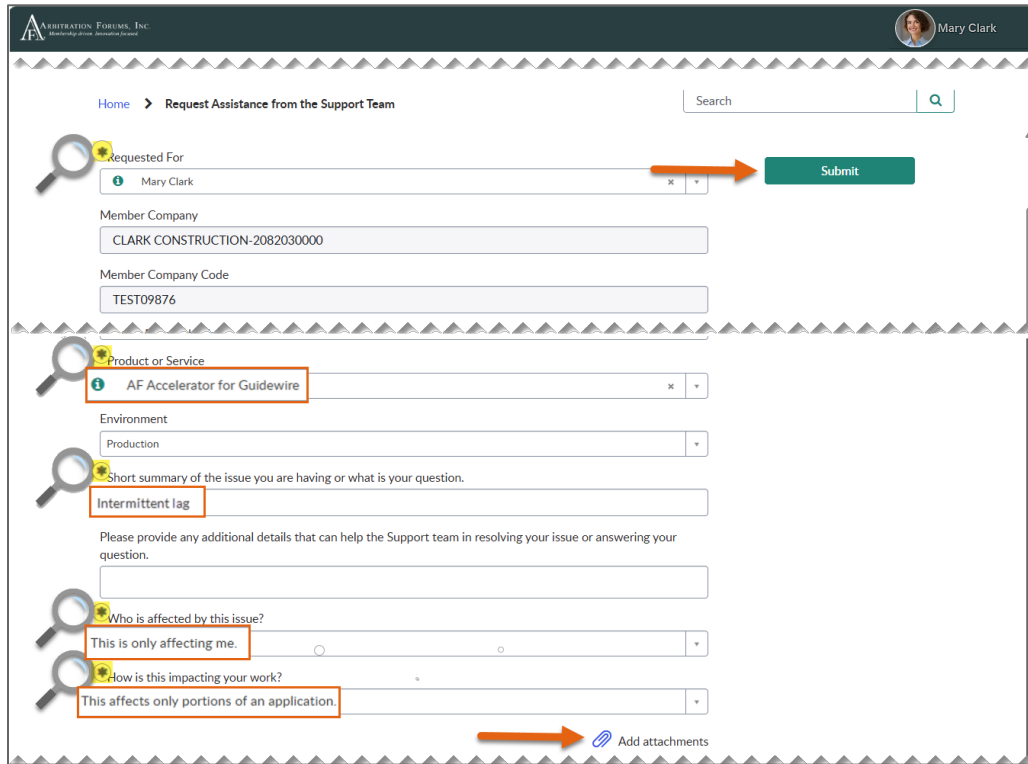
Request Assistance from the Support Team appears. Complete required fields (red asterisk).



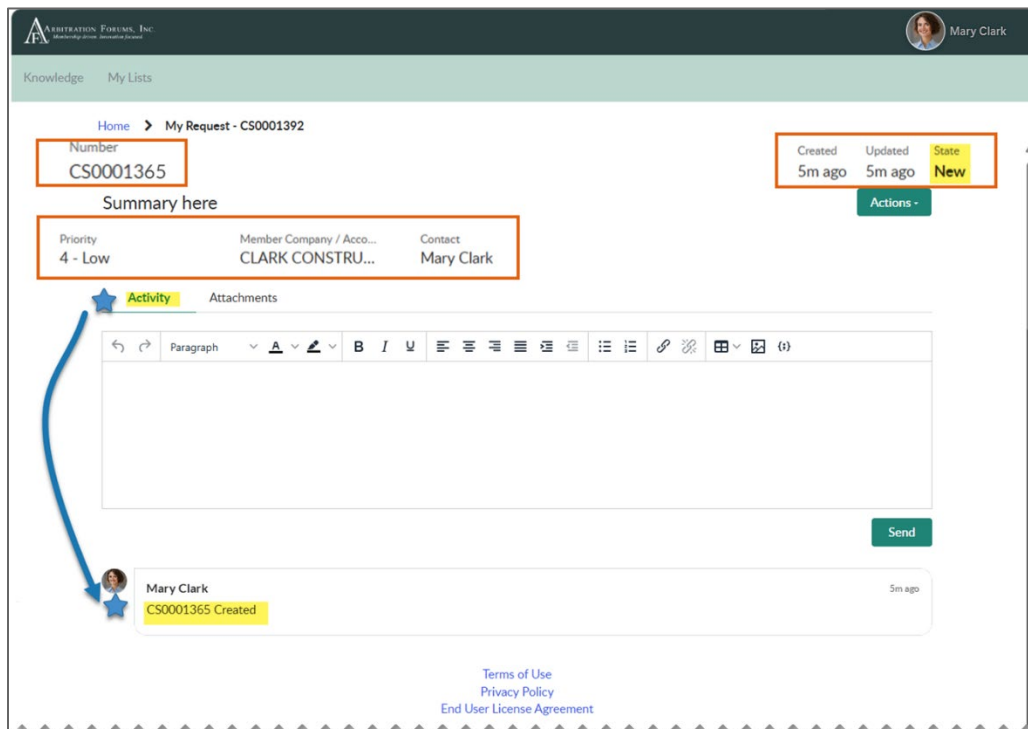
The environment menu defaults to **Production** (see blue stars). **Non-Production** is for members using the User Acceptance Testing (UAT) environment — select **Non-Production** to report any UAT issues. Don't forget to add any essential attachments (click the paper clip).

Confirm your item(s) are attached by clicking the **Attachments** heading. Notice below the document, including its size, appears. Multiple attachments are allowed.

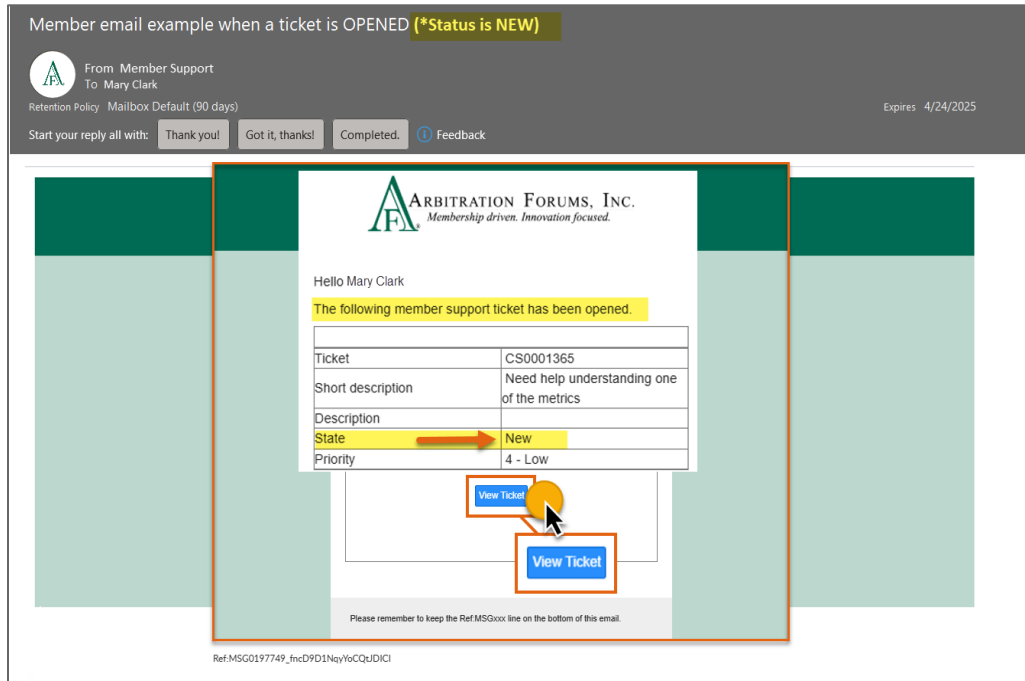
The red asterisk on each required field changes to black after it is completed. After completing all required fields, click the green **Submit** button.



Your request appears with a reference number, a priority level, and a status of **New**.

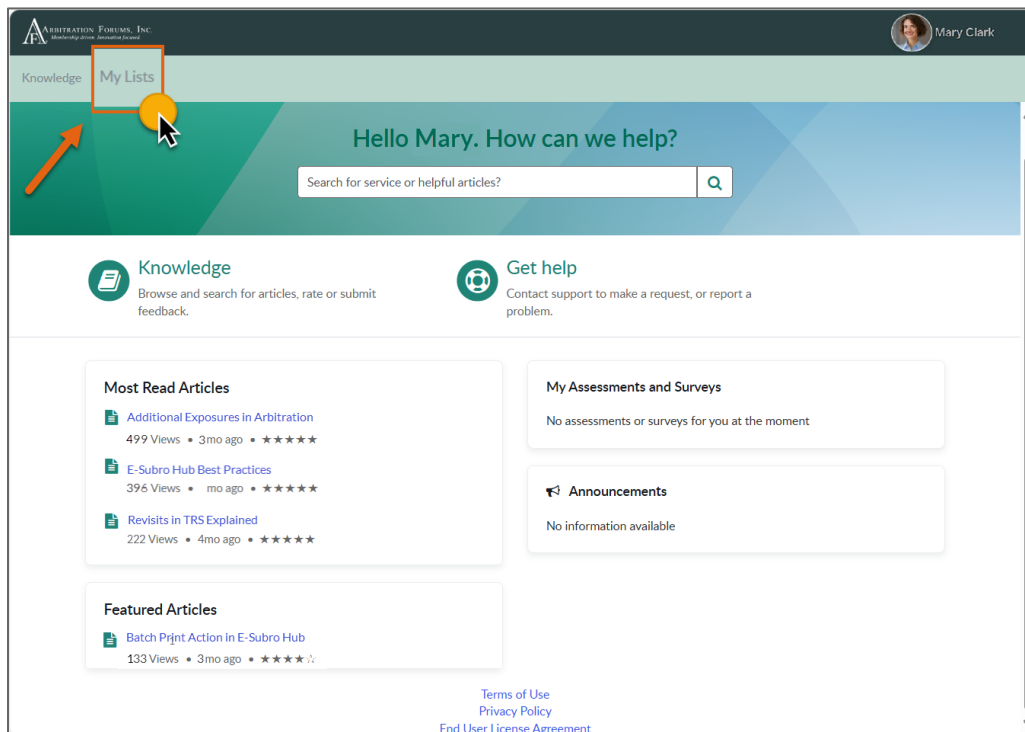


AF then sends an email stating your ticket has been opened (see highlights below). Click the **View Ticket** button in the email to access the ticket.



My Lists

Alternatively, click **My Lists** from the home screen (see below and next page).

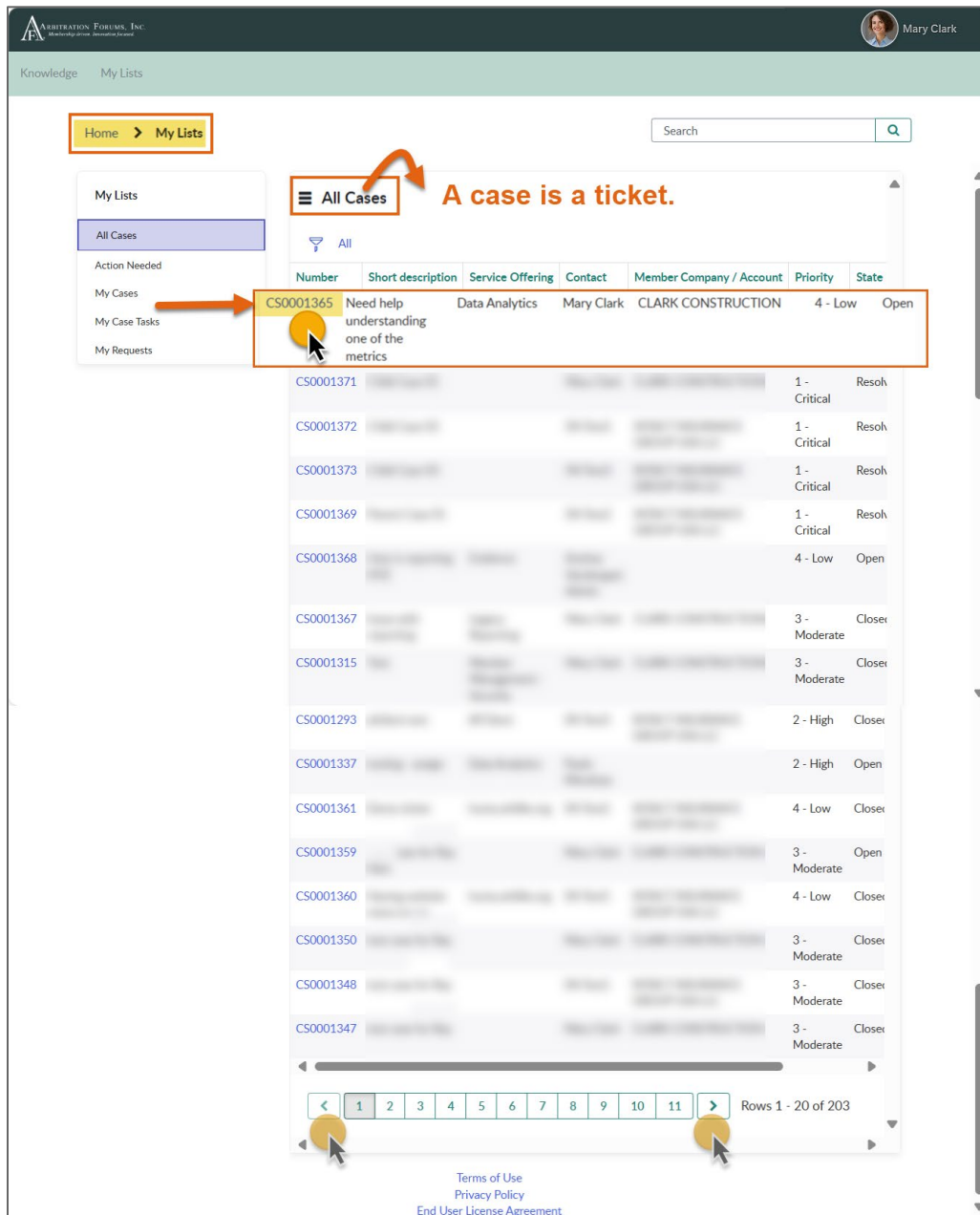


My Lists is a list of your tickets. See the **All Cases** heading below.



The software used to deliver the Member Support Portal uses the term case: a **case** is a ticket.

Click the individual case number for more detail. Click the arrows and/or page numbers at the bottom of the page to locate other cases. The default filter is **All Cases**. Cases can be filtered by **Action Needed**, **My Cases**, **My Case Tickets**, and **My Requests** (see left).



After clicking the reference number, granular information about the case appears.

Activity View

Activity is the default view of the request (indicated by green font). This will show all activity on the case, with the newest activity at the top. Below, the latest message confirms a support ticket has been opened and assigned. Notice in the upper left the circle with two initials (in this case, TG) followed by the Member Services Representative's name. To send a message, type it in the text box and click **Send**.

Knowledge My Lists

Home > My Request - CS0001365

Number
CS0001365

Created	Updated	State
2d ago	1d ago	Open

Actions -

Need help understanding one of the metrics

TG	Assigned to Tom Guzman	Priority 4 - Low	Member Company / Acco... CLARK CONSTRU...	Contact Mary Clark
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Activity Attachments

I am sending a message here.

Send

System
to: mclark@example.com
1d ago • Email received

Subject: Arbitration Forums Member Support Ticket CS0001365 has been opened • Hello Mary Clark, The following member support ticket has been opened. Ticket CS0001365 Short description Need help understanding one of the metrics Description State New Priority 4 - Low View...

Show full email

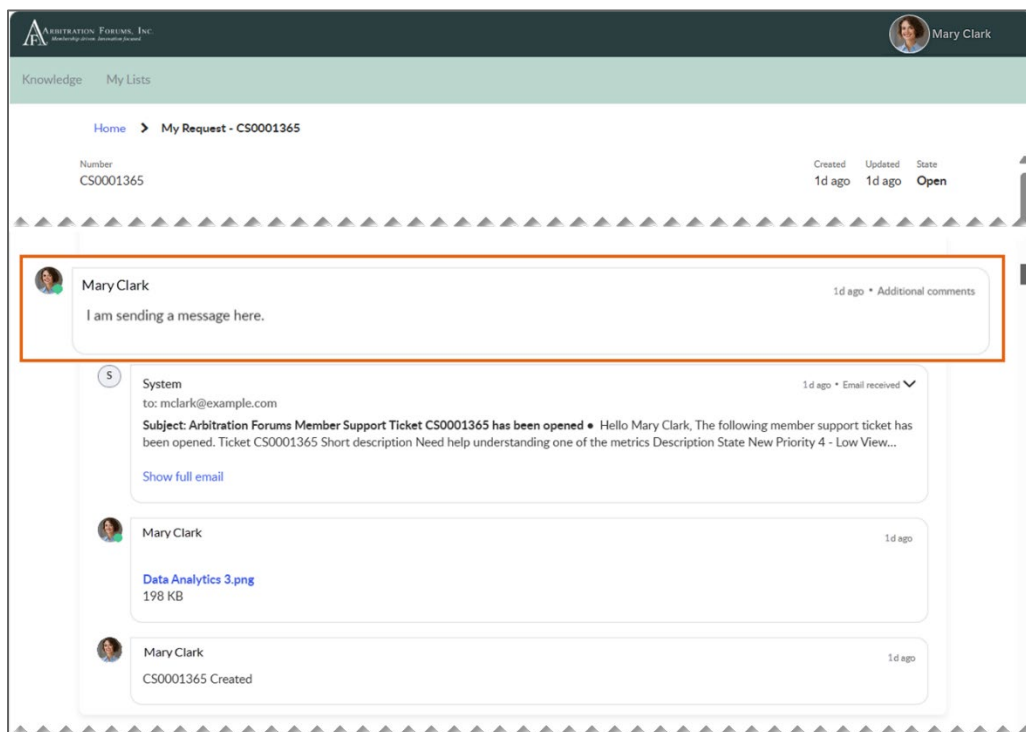
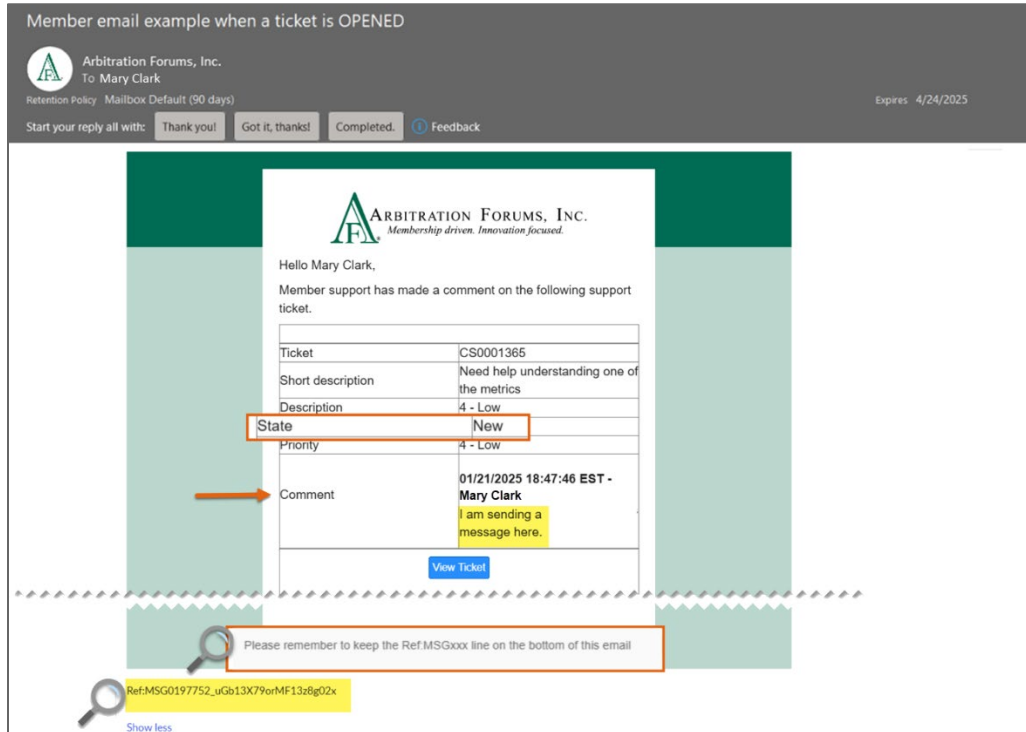
Mary Clark
Data Analytics 3.png
198 KB
2d ago

Mary Clark
CS0001365 Created
2d ago

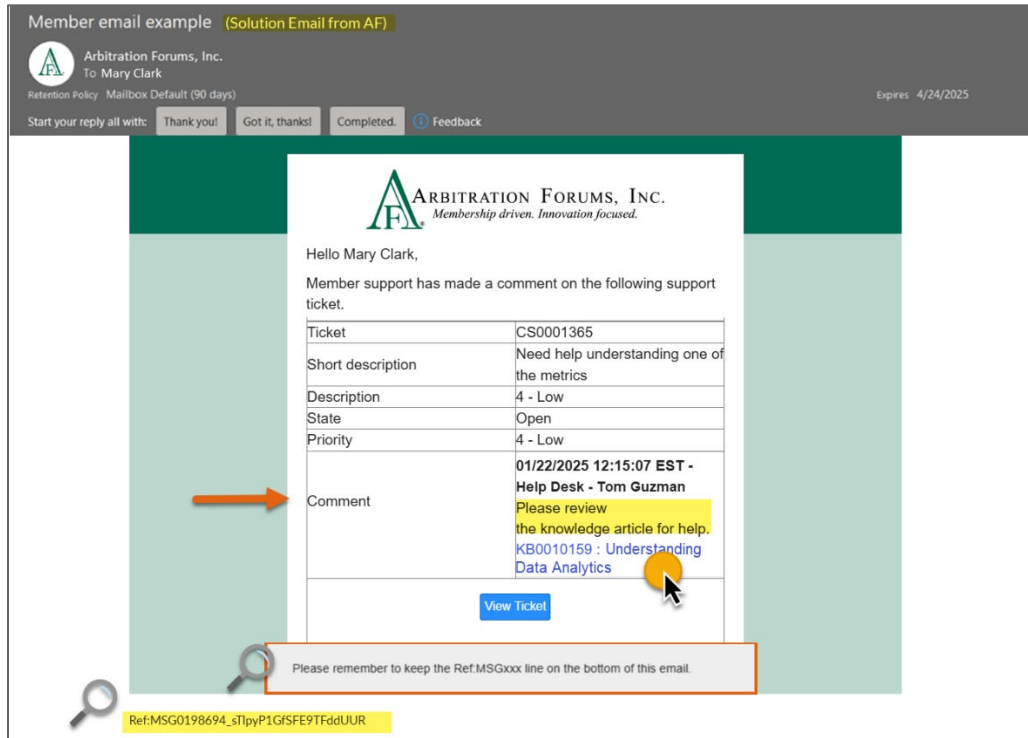
Terms of Use
Privacy Policy
End User License Agreement

Email Notifications

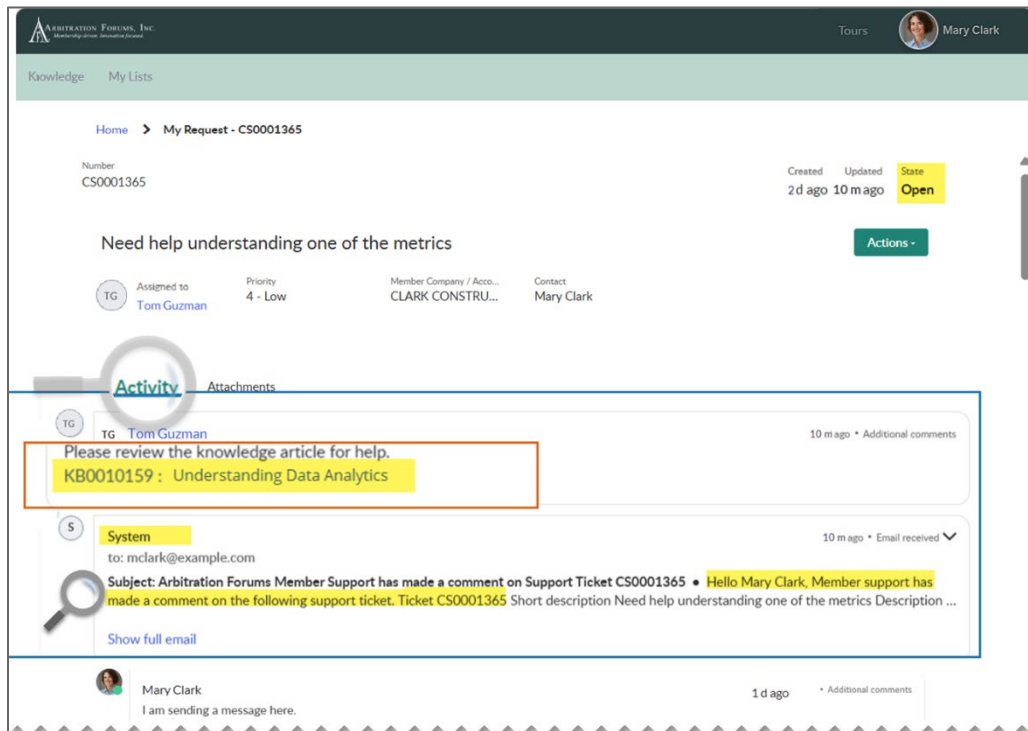
Notice the email below shows your message in the **Comment** area. Look for the Reference Code at the bottom of the email. Your email also appears in the **Activity Log** (see second image).



An AF Member Services Representative will reply to your request. See the following email notification with a link to a **Knowledge Base** article.



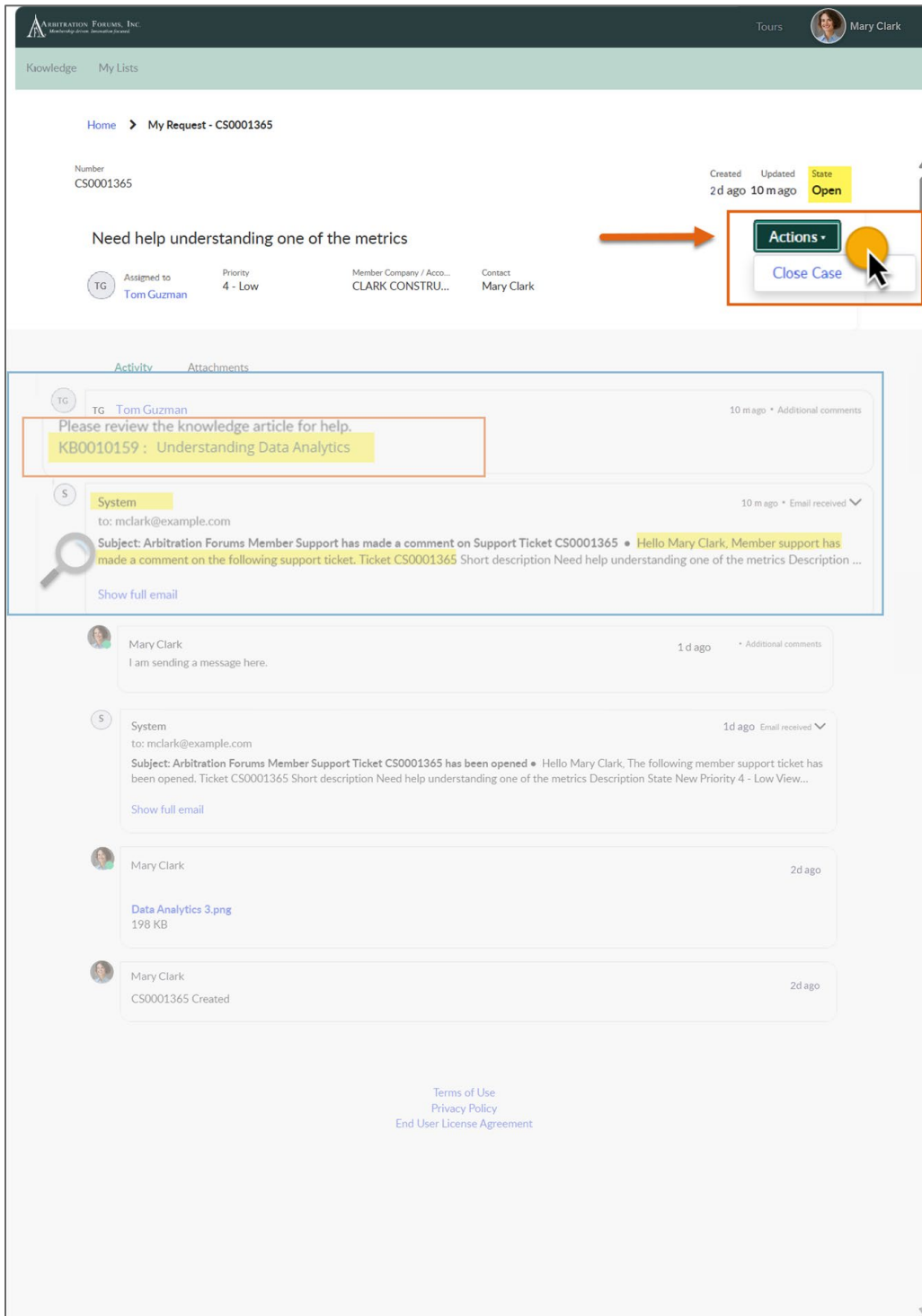
The response also appears in the **Activity Log**.



If the information shared addresses your question/issue, please click the **Actions** button at the upper right, and then click **Close Case**.



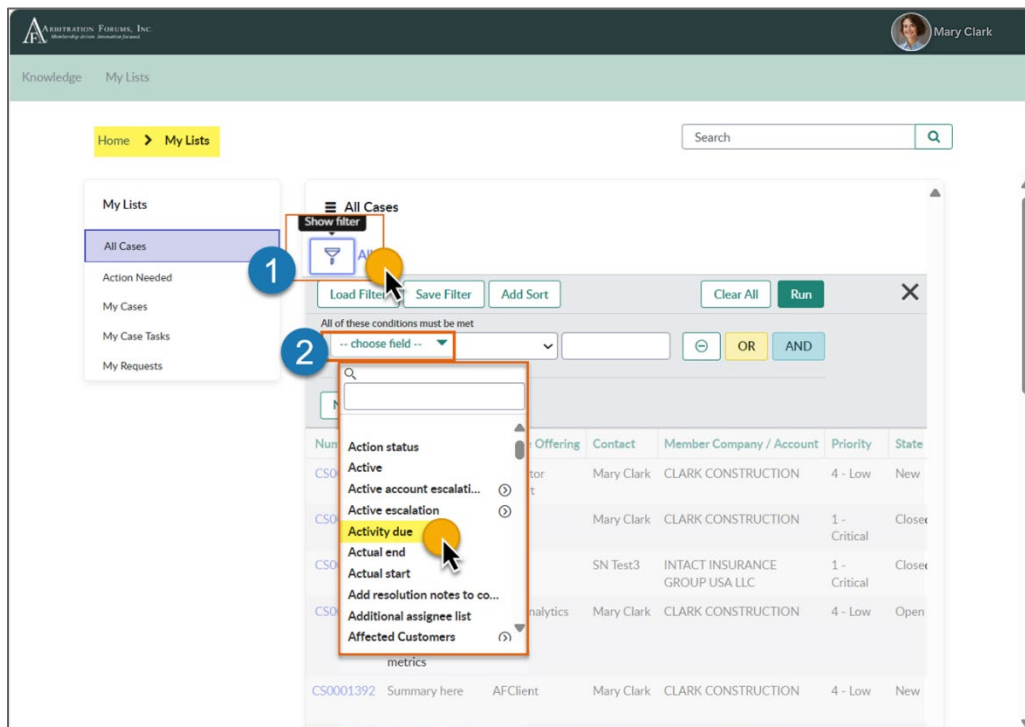
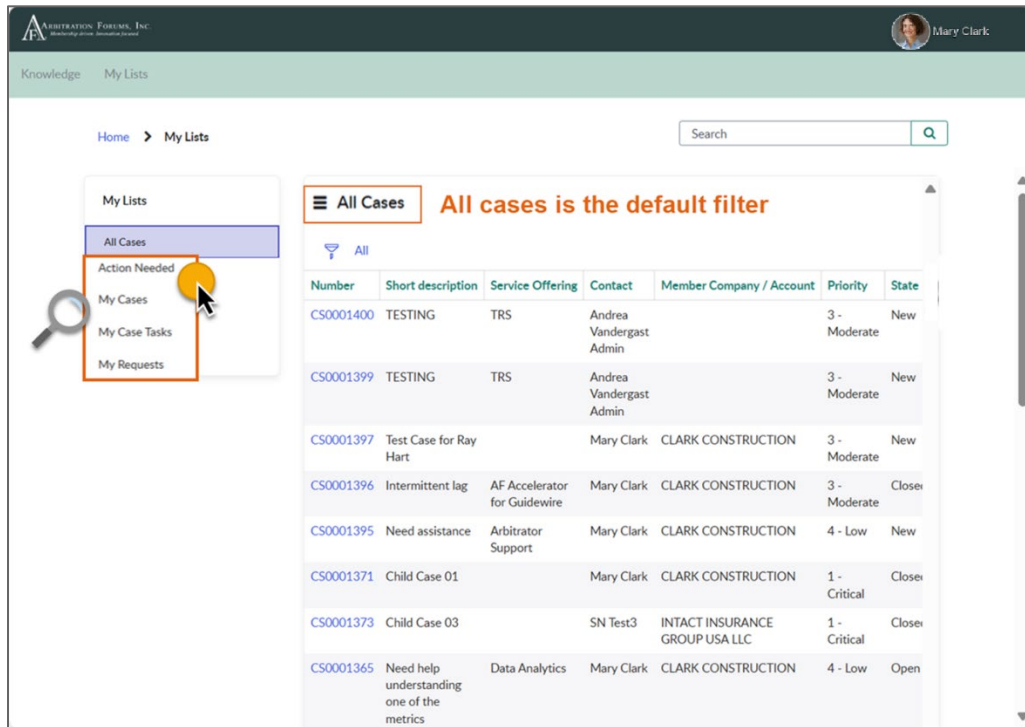
If the case is not closed, it will automatically close after seven days of inactivity. Please look in your email for a satisfaction survey.



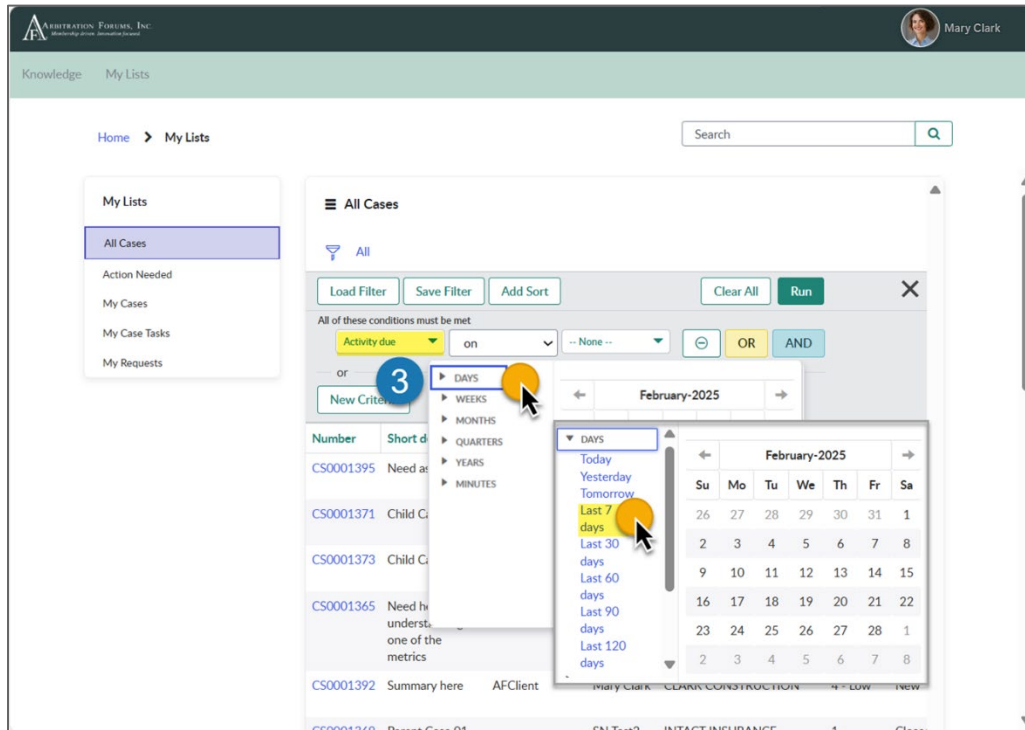
The screenshot displays the user interface for a support ticket. At the top, the user is identified as Mary Clark. The ticket number is CS0001365, created 2 days ago and updated 10 minutes ago, with a state of 'Open'. The ticket description is 'Need help understanding one of the metrics'. The assigned person is Tom Guzman, with a priority of 4 - Low. The activity log shows a comment from Tom Guzman linking to a knowledge article 'KB0010159 : Understanding Data Analytics', a system email notification, and a message from Mary Clark. The 'Actions' button is highlighted with a red box and an orange arrow, with a mouse cursor hovering over it.

Filtering My Lists

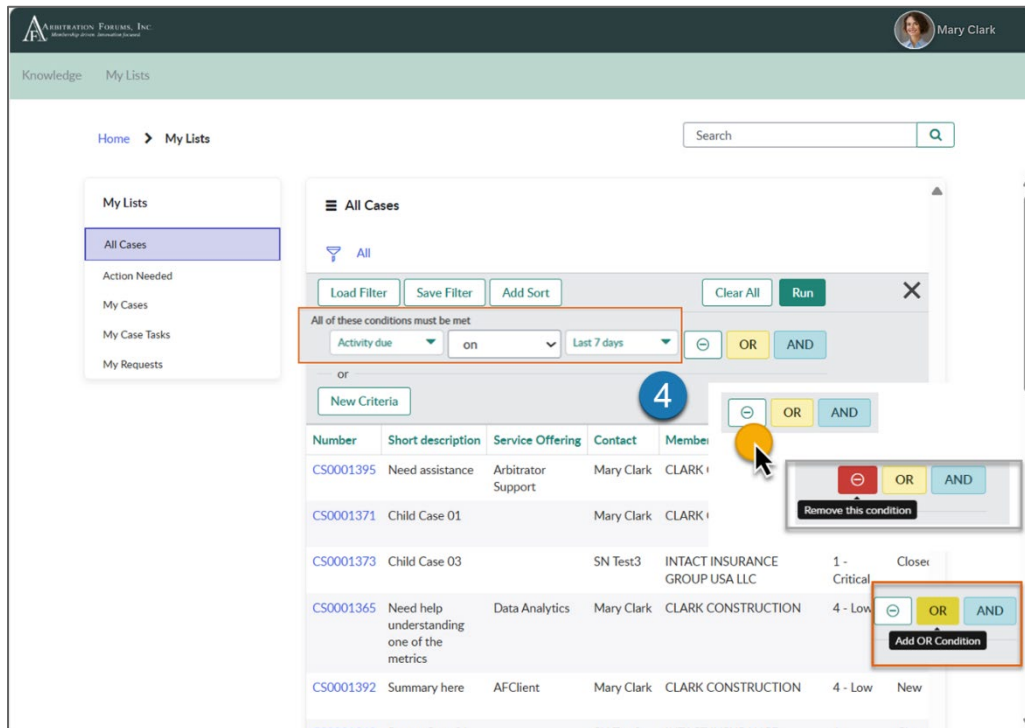
The default filter for **My Lists** is **All Cases**. Use the filters on the left — **Action Needed**, **My Cases**, **My Case Tasks**, and **My Requests** — to filter your cases by broad categories. Click the filter icon (see second visual) for more detailed filtering options.



Working left to right, choose filters. In the first sample image below, the initial filter is **Activity Due** (see highlighted). Based on this filter, a duration filter appears. Select the duration by days, weeks, months, etc., as provided.



Notice the ability to filter further using the **OR** and **AND** filter buttons (also see next page).



The screenshot displays the 'All Cases' filter interface. A red box highlights the filter controls, and blue circles with numbers 5 and 6 point to the 'New Criteria' button and the 'Run' button respectively.

5 points to the **New Criteria** button.

6 points to the **Run** button.

The filter interface includes the following elements:

- Buttons:** Load Filter, Save Filter, Add Sort, Clear All, Run, X.
- Filter Logic:** All of these conditions must be met.
- Criteria:** Activity due on Last 7 days, Affected Customers is.
- Connectors:** AND, OR.
- Message:** Please enter 1 or more character(s).

Case ID	Description	Category	Assignee	Company	Priority	Status
CS0001395	Need assistance	Arbitrator Support	Mary Clark	CLARK CONSTRUCTION	4 - Low	New
CS0001371	Child Case 01		Mary Clark	CLARK CONSTRUCTION	1 - Critical	Closed
CS0001373	Child Case 03		SN Test3	INTACT INSURANCE GROUP USA LLC	1 - Critical	Closed
CS0001365	Need help understanding one of the metrics	Data Analytics	Mary Clark	CLARK CONSTRUCTION	4 - Low	Open
CS0001392	Summary here	AFClient	Mary Clark	CLARK CONSTRUCTION	4 - Low	New