Troubleshooting Guide

Sign-in problems in the customer portal

Filled-in example. The product, screens, messages, roles, time limits, document numbers and dates are placeholders, chosen to show the level of detail each section needs.

Guide ID	TSG-SUP-007	**Version**	1.2
System	Customer portal (web app)	**Applies to**	All plans, all browsers
Owner	Support team lead	**Last reviewed**	2026-10-12
Status	Published	**Next review**	2027-01-12

1. Scope and audience

- **Covers:** signing in to the customer portal with an email address and password, including two-step verification.
- **For:** customers, and the support agents who answer sign-in tickets.
- **Does not cover:** single sign-on set up by a customer's own IT team (TSG-SUP-009) and billing access (TSG-SUP-004).

2. Quick checks

- Type the portal address yourself instead of using an old bookmark or a link in an email.
- Check the status page. If it shows a sign-in incident, wait for it to clear instead of resetting anything.
- Try a private browser window. If sign-in works there, go to row 5.

3. Information to collect

- **Error message:** the exact text, or a screenshot of the whole sign-in page.
- **Account:** the email address the customer signs in with, and the workspace name.
- **Device and browser:** the browser and its version, the device, and whether they are on a company network or VPN.
- **When:** the date and time it last failed, with the time zone.
- **Already tried:** the quick checks and rows they have worked through.

4. Troubleshooting table

Symptom	Likely cause	Check	Fix	If not fixed
1. “Incorrect email or password”	A typo, Caps Lock, or a different email address from the one on the account	Ask which address they typed. Search for it under Users in the admin console.	If the address is right, reset the password: F1.	Reset email missing: row 2. Account locked: row 4.

Symptom	Likely cause	Check	Fix	If not fixed
2. The password reset email does not arrive	A spam filter, a typo in the address, or the company's mail filter	Ask them to search spam and quarantine. Compare the address with the one under Users.	Click Send reset email again. Ask their IT team to allow mail from the portal's sending address.	Nothing after 30 minutes: escalate to tier 2.
3. “Code expired” or “Invalid code” at two-step verification	An old code, or a phone clock that is out of step with the real time	Ask if they typed the newest code, and if the phone sets its time automatically.	Wait for a new code and type it at once. Turn on automatic date and time on the phone.	Phone lost, or codes still fail: an admin resets two-step verification, F3.
4. “Account locked”	Too many failed sign-ins in a row	Open the user in the admin console. The status reads Locked.	Wait 15 minutes for the lock to clear, then use F1. An admin can unlock it sooner: F2.	Locked again right after unlocking: escalate as a security concern.
5. The sign-in page reloads, or loops back after signing in	Blocked cookies, old stored site data, or a browser extension	Try a private window. If sign-in works there, the cause is in the usual window.	Allow cookies for the portal, delete its stored site data, then turn extensions off one at a time.	Loops in a private window too: escalate to tier 2.
6. “Your organization requires single sign-on”	The customer's company has turned on single sign-on for the workspace	The message confirms it.	Click Sign in with SSO and use the company account, not a password.	SSO fails: the customer contacts their own IT team (TSG-SUP-009).

5. Fix procedures

F1. Reset your password

Step	Do this	You should see
1	On the sign-in page, click Forgot password.	The Reset your password page opens.
2	Type the email address you sign in with, then click Send reset email.	The message Check your email appears.
3	Open the email and click Reset password within 60 minutes.	A page opens with two password boxes.
4	Type a new password in both boxes and click Save password.	The message Password changed appears, with a Sign in button.
5	Click Sign in and sign in with the new password.	Your portal dashboard opens.

F2. Unlock an account (admins)

Step	Do this	You should see
1	In the admin console, click Users and search for the customer's email address.	Their row shows the status Locked.
2	Open the user and click Unlock account.	The status changes to Active.
3	Ask the customer to sign in again, or to reset the password with F1 if they are unsure of it.	The customer confirms they are signed in.

F3. Reset two-step verification (admins)

Step	Do this	You should see
1	Confirm the customer's identity with the support identity check before you change anything.	The ticket notes how identity was confirmed.
2	In the admin console, open the user and click Reset two-step verification.	A box explains that the customer sets it up again at the next sign-in.
3	Click Reset, then ask the customer to sign in.	The customer is asked to set up two-step verification again.

6. Escalation

- **Stop and escalate at once if:** the customer reports sign-ins they did not make, an account locks again right after it was unlocked, or several customers report the same problem within an hour.

Escalate when	To	Send
A row's If not fixed column says escalate	Tier 2 support, with the Escalate button in the ticket	The details from section 3 and the rows already tried
A possible security problem	The security on-call engineer, in the incident channel	The account and the times of any sign-ins the customer did not make
Many customers at once	The support team lead	Links to the tickets, so the lead can decide whether to open an incident

7. Revision history

Version	Date	What changed	Changed by
1.0	2026-03-09	First version	Support team lead
1.1	2026-06-22	Added row 6 when single sign-on became available	Support agent
1.2	2026-10-12	Row 3: added the phone clock check after a run of “Code expired” tickets	Support team lead

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