



GFI Accounts[™] *Area* CUSTOMER GUIDE

Find out how to navigate and benefit from all the features that the GFI Accounts Portal offers to GFI customers.



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1 Introduction

1.1 About

The GFI Accounts Portal is a web-based portal that offers GFI customers an account management solution that is intuitive and easy to use.

As a registered user, you can view detailed information about your product license keys, upcoming renewals and support requests. You can also upgrade your license keys, and edit your account details.

This guide shows you how to navigate the GFI Accounts Portal, explains its features and tells you how to derive maximum benefit from it.

1.2 Using this help

To make reading easier and more informative, we used a variety of visual cues to indicate how to navigate the help. We also used visual cues to highlight important information. This section describes those cues and how you can use them.

Intended audience

This guide benefits GFI customers who own, or are familiar with, at least one GFI product. Some of the topics and concepts covered assume a rudimentary understanding of common business practices.

Terms and conventions used in this guide

Term	Description
Note	Additional information and references essential for the operation of GFI Accounts Portal.
Important	Important notifications and cautions regarding potential issues that are commonly encountered.
>	Step by step navigational instructions to access a specific function.
Bold text	Items to select such as nodes, menu options or command buttons.
<i>Italics text</i>	Parameters and values that you must replace with the appropriate value, such as custom paths and file names.
Code	Indicates text values to key in, such as commands and addresses.

1.2.1 We value your feedback!

If you have not found what you are looking for or if you have any comments, do not hesitate to get in touch with us. All comments are valued and inquiries are treated with the strictest confidence.

Send us an email at documentation@gfi.com

2 Getting Started

In this section, learn how to log in to the GFI Accounts Portal, edit your account details, change your login credentials and add new users to your account.

Topics in this section:

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2.1 Logging in

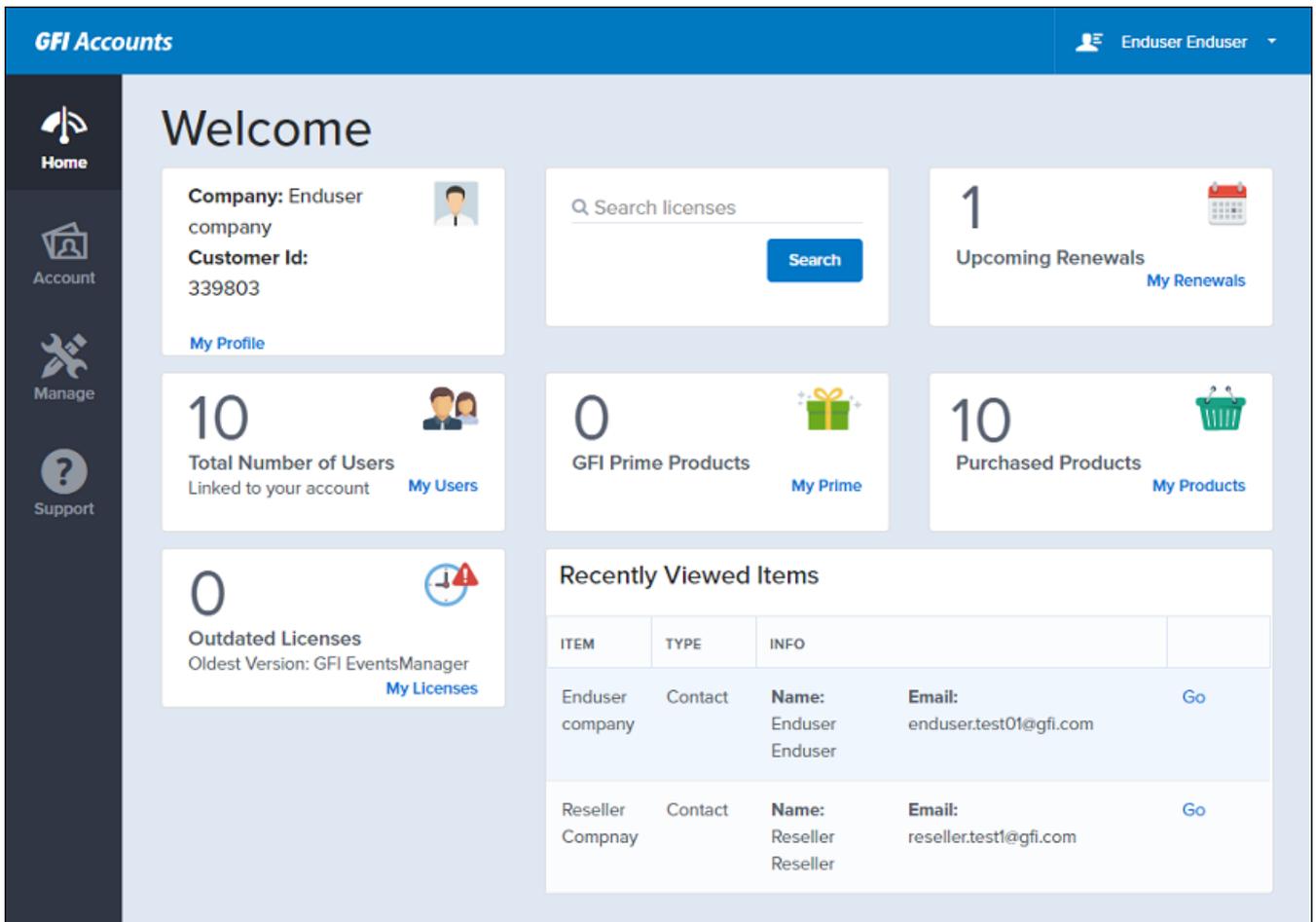
The GFI Accounts Portal allows customer to manage their accounts and the products they own. The portal can also be used to contact support.

Your username is the email address used to register or purchase your product or to sign up for a trial product evaluation.

If you receive an invalid username or password message, you can [reset your password](#).

To login to the GFI Accounts Portal:

1. On your favorite browser navigate to <https://accounts.gfi.com>
2. Type your credentials and click **Sign in**.



Screenshot 1: GFI Accounts Portal interface

From the GFI Accounts Portal you can:

- [Manage users](#)
- [Manage licenses](#)
- [Opening a support case](#)

2.2 Adding users

If your organization has multiple people in charge of unique facets of your business, you can add them as contacts under your account. You can add as many contacts as you need.

Users can have access to the GFI Accounts Portal and are able to execute administrative tasks such as upgrading license keys or managing support cases.

To add a new user to your account:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Home > My Users**.
3. Click **Add user**.

General

General information ✳ Import from primary

Contact
Billing ▼

Firstname Firstname **Lastname** Lastname

Email Email **Telephone** Telephone

Fax Fax **Mobile** Mobile

Address information

Address Address **Zipcode** Zipcode

Address Address **Country** Country

Address Address **City** City

Cancel **Save**

Screenshot 2: New user details

4. (Optional) If there is a user added that has common information click **Import from primary**.
5. Type in the users' details.
6. Click **Save**.

NOTE

There is currently no alert email sent to the newly added contact. Have your newly added users request their password at <https://accounts.gfi.com/ForgotPassword>.

2.3 Editing accounts details

GFI Software personnel uses the account details stored in the GFI Accounts Portal to let you know about product releases, system issues, press releases and other types of beneficial information.

Keeping your account details up-to-date and accurate ensures you are the first to know about relevant issues that directly affect you and your purchased product.

The Account Information section contains company details and contact information for the primary contact. The primary contact is responsible for the account and has the ability to manage the account and to add or remove contacts for the same account.

To change your account information:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Account > Account Info**.
3. Click the  icon.
4. Click **Edit Details**.
5. Edit the following fields:

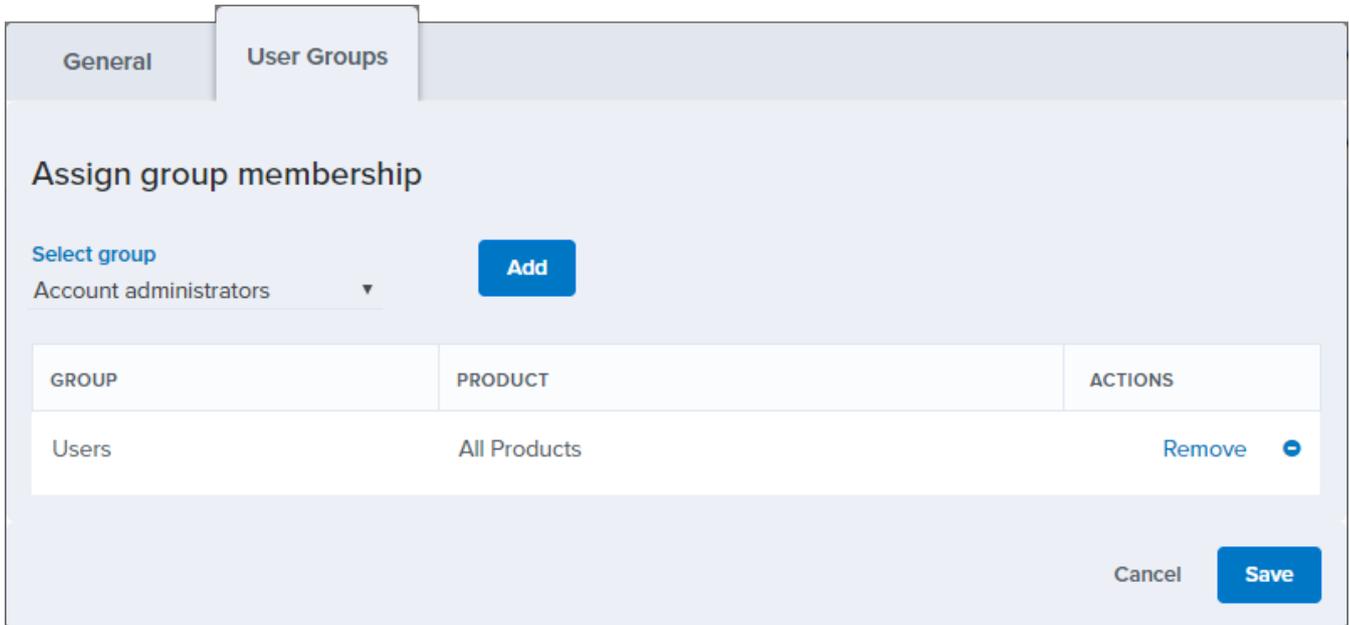
Section	Field	Description
Account settings	Contact	Select one of the following options: » Billing . A billing contact is responsible for purchases. When your account is set up, you are labeled as a billing contact by default. » Renewal . This is the contact who should receive renewal updates from GFI. » Technical . A contact that is a member of the technical support team. » Marketing . A contact that is a member of the marketing team.
	Vat/Tax	Enter your company tax number
	Website	Edit the URL of your website.
	Address details	Company
Address details	Address	Edit the address of your company.
	City	Type the city name.
	Zip Code	Enter the zip code that corresponds to your address.
	Country	Select a country from the drop-down list.
Contact Details	Firstname	Edit the first name of your main contact.
	Lastname	Edit the family name of your main contact.
	Email	Enter the email address.
	Telephone	Edit the telephone contact number.
	Mobile	Edit the mobile number.
	Fax	Edit the fax number of where you contact can be reached.

6. Click **Save Details**.

2.4 Managing users

GFI Accounts Portal allows users that are members of the Accounts administrator groups to manage users for their accounts. By default the primary contact for an account is member of the Account administrator group.

Account administrators can change group membership, set a user as primary contact, and remove users.



Screenshot 3: Group membership options

Changing group membership

To change group membership for a user:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Account > Users**.
3. Click the  icon next to the user you want to change the group membership.
4. Click **Edit**.
5. Under the **User Groups** tab select a group:

Group	Description
Users	Users can login to the GFI Accounts Portal, but cannot perform administrative tasks.
Account Administrators	Users with full permissions on the GFI Accounts Portal. Members of this group can add, edit or remove users and execute other administrative tasks like purchasing a new product.

6. Click **Add**.
7. Click **Save**.

Removing group membership

To remove the group membership for an user:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Account > Users**.
3. Click the  icon next to the user you want to change the group membership.
4. Click **Edit**.
5. Click **Remove** next to the group that the user is a member of.

Setting a primary contact

A primary contact can be used to pre-populate information when adding contacts. This feature saves time when adding many users with common details.

To set a user as primary contact:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Account > Users**.
3. Click the  icon next to the user you want to change the group membership.
4. Click **Set as primary**.

Removing a user

To remove a user:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Account > Users**.
3. Click the  icon next to the user you want to change the group membership.
4. Click **Remove**.

2.5 Resetting a password

Use the link **Forgot password?** to reset your password in case you lost or forgot it.

NOTE

You have a time limit of three hours to reset your password.

Login to your account
Enter your credentials below

Username

Password

Sign In

Remember me [Forgot password?](#)

Screenshot 4: Link to reset password

To reset your password:

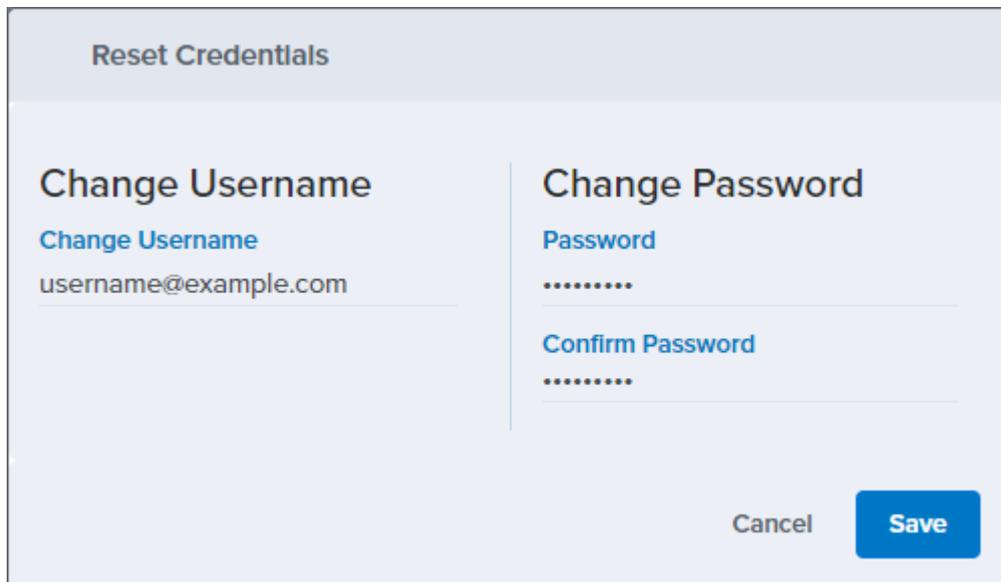
1. Using the browser of your preference navigate to <https://accounts.gfi.com>
2. Click the link **Forgot password?**
3. Enter your email address in **Email**.
4. Click **Submit**.
5. Open your mailbox and find the email from GFI sales. Check the junk folder if you cannot find the email in your inbox.
6. Click on the link provided to reset your password.
7. Type the new password twice.
8. Click **Reset**.
9. Go back to the login page and enter the new credentials.

2.6 Changing login details

For convenience, GFI Accounts Portal offers a way to change your login details.

To change your login details:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Accounts > Users**.
3. Under the **Actions** column click the  icon.
4. Click **Reset Password**.



Screenshot 5: Changing login credentials options

5. Edit the following fields:

Field	Description
Username	Type a new email address as username to change it. Leave the existing username if you desire to keep it.
Password	Type a new password. Secure password should use include a mixture of upper and lowercases, numbers and special characters.
Confirm password	Retype the same password entered above.

6. Click **Save**.

3 Managing Licenses

In this section, learn how to check the status of your license or subscription, how to buy a new product and how to upgrade a license key.

Topics in this section:

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3.2 Getting a quote	14
3.3 Purchasing a new product	15
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3.1 Renewing a license or subscription

You can license a GFI product with an account-based license that you enter into the product's registration interface or you can license it with an annual subscription that you control via the GFI Accounts Portal. To receive support, free upgrades and the latest version of security updates, you must have an active subscription or a valid Software Maintenance Agreement (SMA).

GFI Software sends four warning emails to alert customers that your license are about to expire. The emails are sent 90, 60, 30 and 7 days prior to the product's renewal date. If the product license expires, several follow up emails are sent, explaining the steps to take to renew the license.

Hey John, your GFI MailEssentials license renewal deadline is getting close

Your **GFI MailEssentials** license is **expiring in 60 days**. We hope you have experienced the benefits of GFI MailEssentials to provide secure and nuisance-free email that protects your business and improves employee productivity and efficiency.

To keep enjoying these benefits, we kindly ask you to renew your license.

Renew now and you will also be automatically enrolled in the **GFI Prime** customer loyalty program, which entitles you to a featured GFI product completely free!

aBc1dE-E23F4-5gHi6-j78K0-9Lm2O-n4680

[Renew now](#)

Screenshot 6: Email sample sent to customers

Click the link **Renew now** at the bottom of the email to start the renewal process. The system opens an email pre-populated with the customer's reseller's email address and a request for renewal.

3.2 Getting a quote

The GFI Website displays a pricing list with all the options available. All prices shown are per node, per year and are exclusive of tax.

Pricing

All prices shown are per node, per year and are exclusive of tax.

Description	Subscription for 1 year	Additional nodes*	Upgrades	Subscription Renewal
25-49 nodes	€26.00	€24.00**	€21.00**	€16.00**
50-249 nodes	€14.00	€13.00	€11.00	€7.00
250-2999 nodes	€10.00	€9.00	€8.00	€5.00
3000+ nodes	Contact us	Contact us	Contact us	Contact us

Screenshot 7: Pricing page on the GFI website

To access the pricing page:

1. Open a browser and navigate to <https://www.gfi.com>
2. Navigate to **Products and solutions > [GFI Product] > Pricing.**

For a customized quote contact a [GFI partner](#).

3.3 Purchasing a new product

A license or subscription is required to enable a fully-functional product.

GFI Product licenses are purchased from the GFI Accounts Portal through a GFI reseller. Purchasing from a reseller has several advantages:

- » Local support and advise from the technical and sales perspective.
- » Assistance with installation, configuration and supported by trained and certified professionals.
- » Access to helpful documents such as reference accounts, pricing guides, product literature and detailed specification.

3.3.1 Selecting a Partner

All GFI customers need to have their accounts associated with a GFI Partner. If you are a new client you are requested to choose a partner. The partner can be changed at a later stage by contacting another partner.

To choose a partner:

1. Navigate to <https://www.gfi.com/partners/find-a-partner/>
2. Copy the email address of the partner you choose.

When using the shopping cart for the first time, you are requested to enter the email address of your preferred partner.

3.3.2 Buying a new GFI product using the GFI Accounts Portal

Use the GFI Accounts Portal shopping cart to purchase new GFI products.

NOTE

The price displayed in the shopping cart may be subject to taxes on your respective region. Contact your reseller if you need more information about the final price.

To start the shopping cart:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Account > My Products**.
3. Click **Details** next to the product in which you are interested.
4. Click **Purchase**.
5. Select the product. This option is only available when a product has two different versions. For example, Kerio Control has hardware and a software package version. Select an option and click **Next**.
6. The first time you use the shopping cart you need to [choose a partner](#). Click **Add partner**. Enter the email address of the partner and click **Save**.
7. Check the **Preferred term**. The options are one, two or three years.

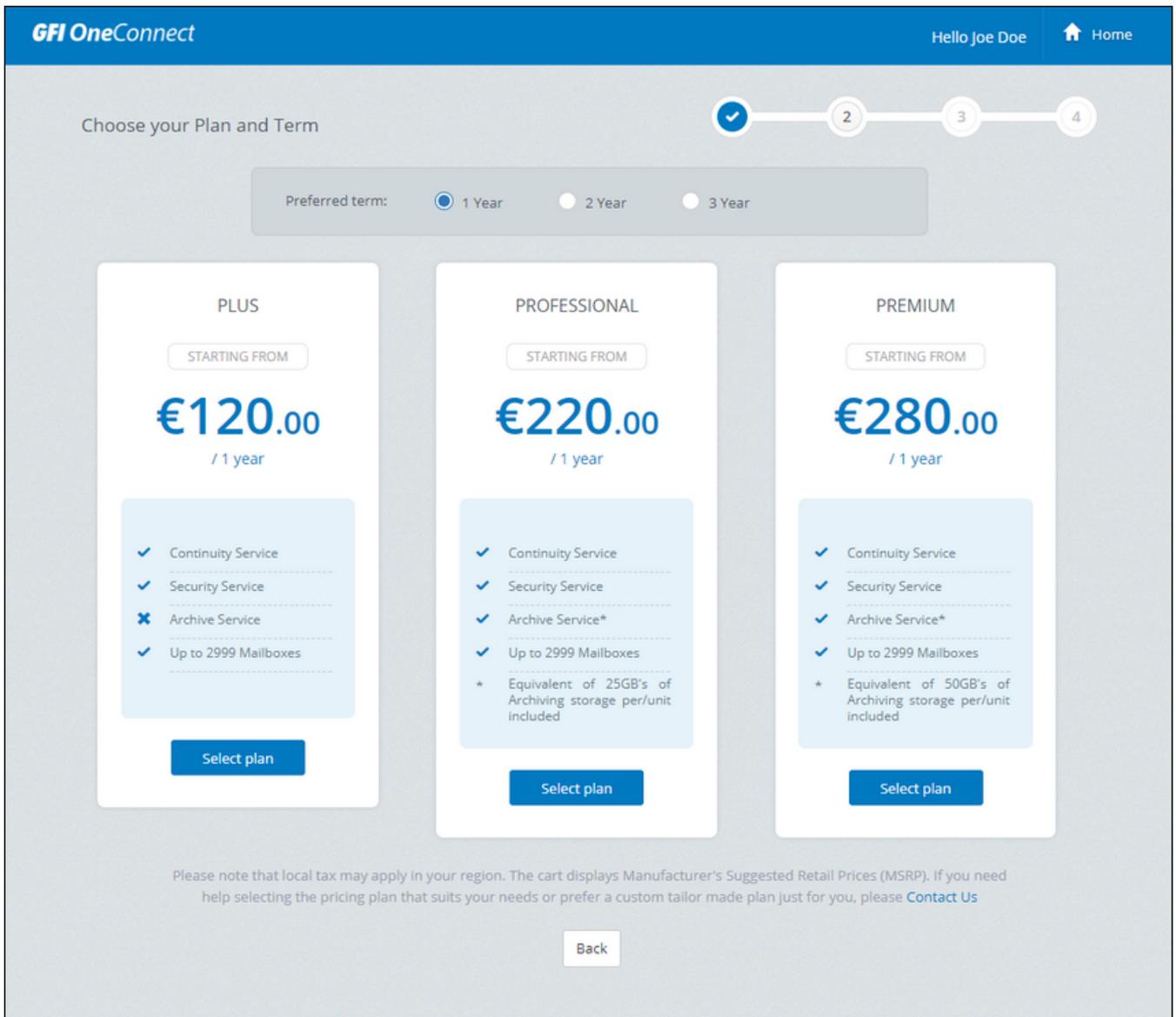


Figure 1: Plan available for the product selected

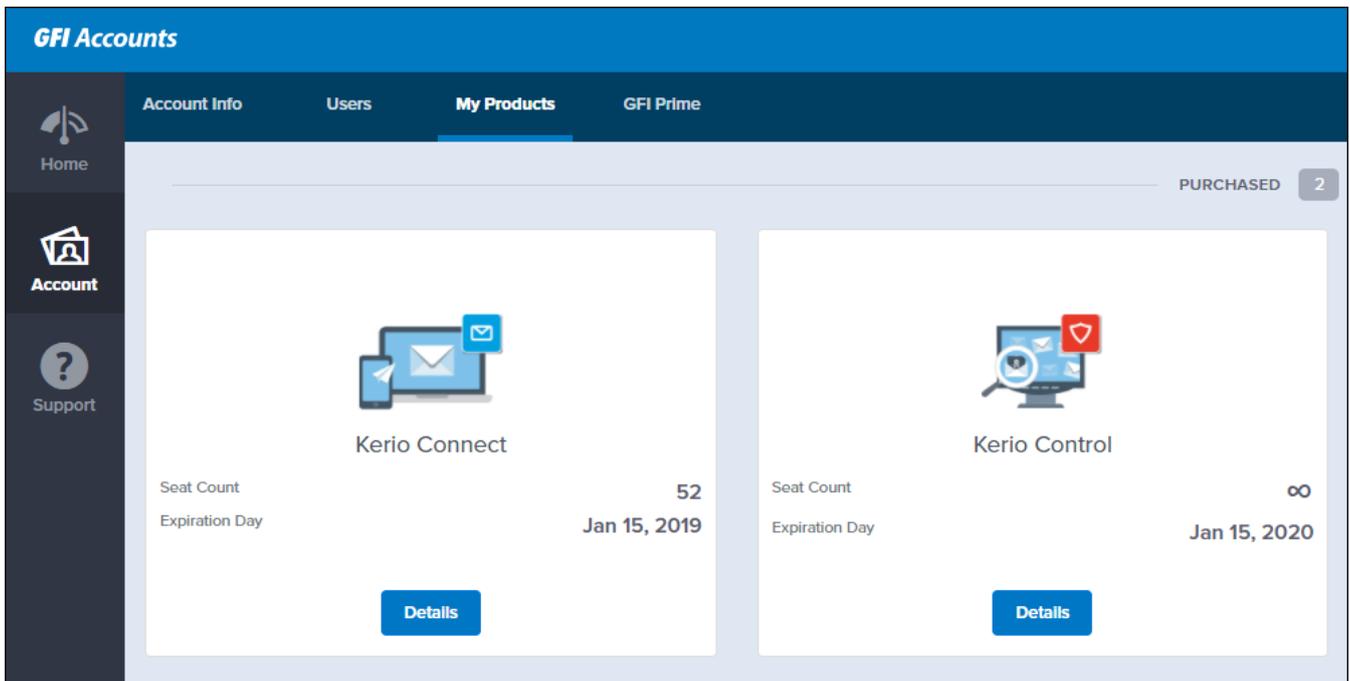
8. Select one of the plans available by clicking **Select Plan**. The plans may vary according to the product.

9. Revise your **Payment Summary** and click **Proceed to checkout**.

10. Your order will be submitted to the partner selected in step 6. You can enter an additional message to the partner on the text box.

11. Click **Submit**.

Once the purchase process is completed by the GFI Partner, you will receive a notification email.



Screenshot 8: Purchased products displayed in the GFI Accounts Portal

You can see the new license details on GFI Accounts under **Accounts > MyProducts**. The new license or subscription shows together with number of seats and expiration date.

3.4 Upgrading a license key

GFI products have two methods to implement licensing:

- » Via GFI Account
- » Via license key

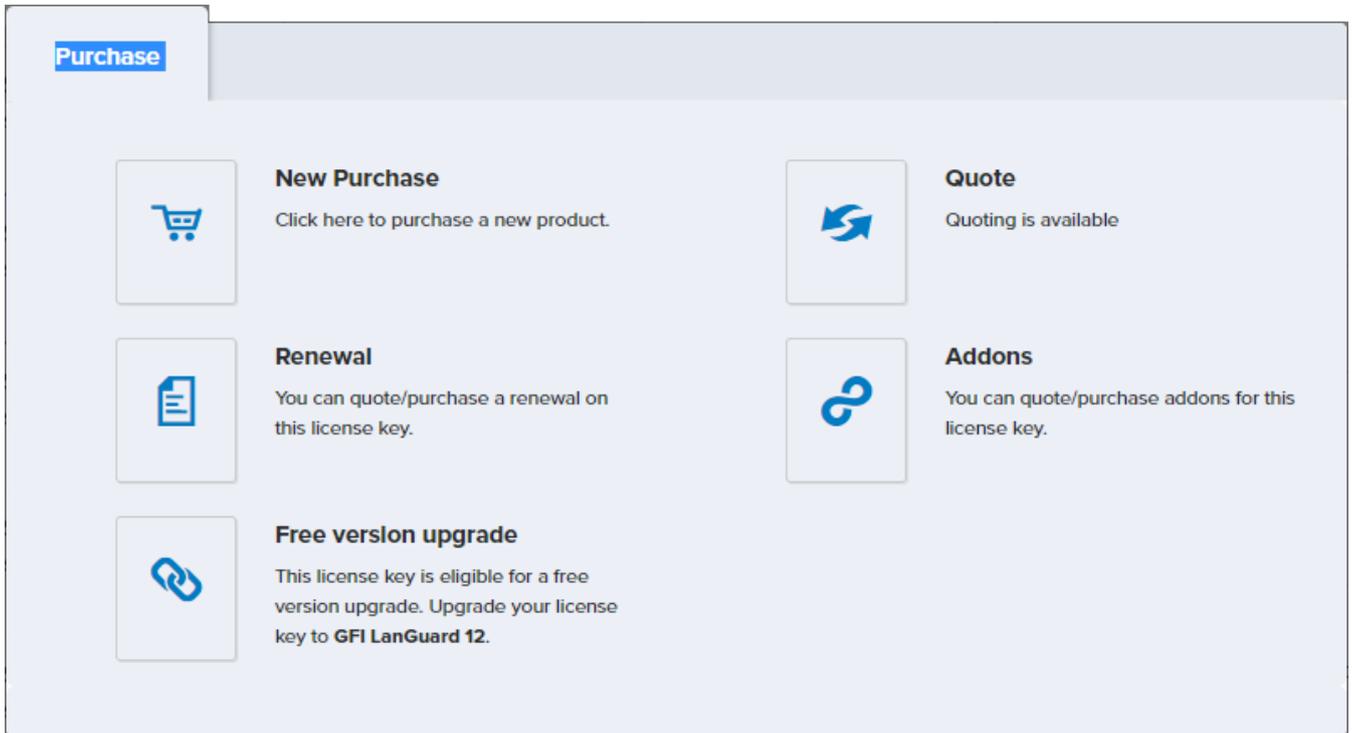
Products that use a license key require a key upgrade when upgrading to a new major version. Clients that have a valid SMA (Software Maintenance Agreement) are eligible for a free upgrade.

NOTE

Once a key has been upgraded, it cannot be downgraded using the GFI Accounts Portal. If you need to downgrade a key, contact the GFI Sales team.

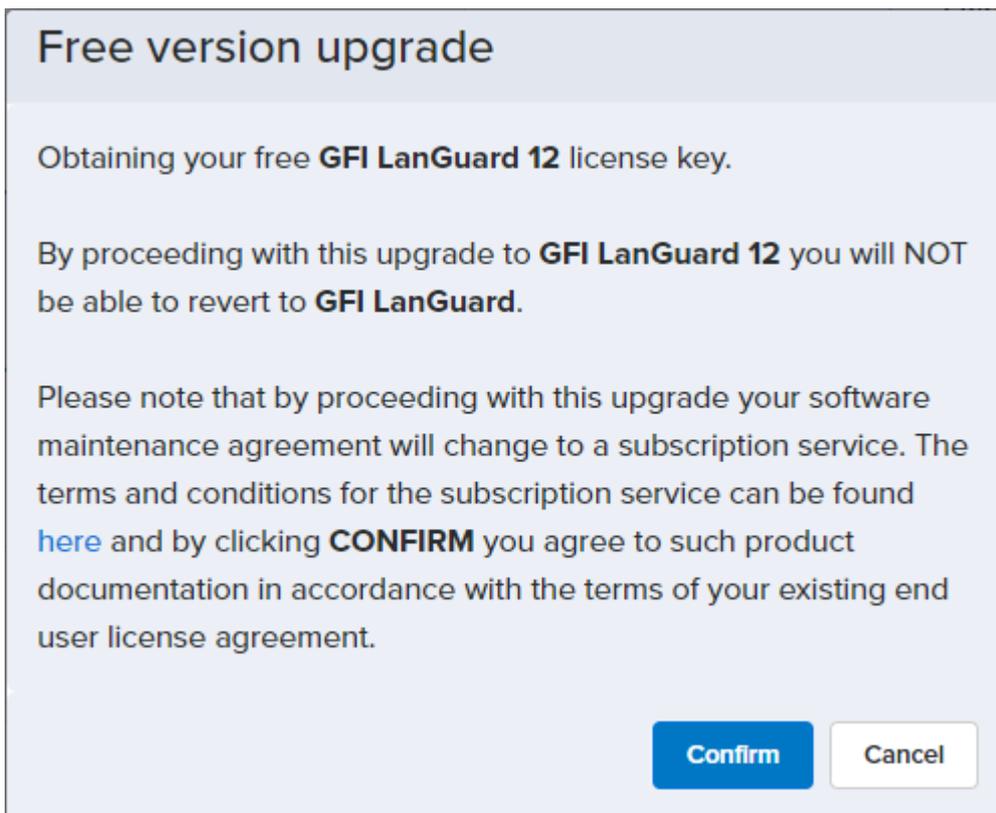
To upgrade the license key for your clients:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Manage > Licenses**.
3. Select the key you want to upgrade and click **Purchase**.



Screenshot 9: Purchase options available

4. Click **Free version upgrade**.



Screenshot 10: Upgrade key option

5. Click **Confirm**.

6. The new key information is displayed. Copy and safely store your new license key.

3.5 GFI Unlimited

GFI Unlimited is a subscription option that unlocks access to a wide range of software available on the GFI library, through a single subscription. It provides you the competitive advantage of powering your business needs through one simple and powerful system.

Through GFI Unlimited, customers pay a flat price per user or unit, and can use as many of the included GFI solutions as they need. With a GFI Unlimited subscription technical support is included for all GFI products used.

Each GFI Unlimited subscription entitles you to:

- » Every product in GFI Unlimited for the number of devices or users licensed.
- » Full functionality of the software and its features based on [catalogue](#).
- » Unlimited installations of the product as long as the number maximum of seats is not exceeded.
- » Technical support for all installed products.
- » Hardware-based deployment available, where applicable.

Note

Hardware appliances and third-party add-on components need to be purchased separately.

Each GFI Unlimited subscription entitles you to:

- » Every product in GFI Unlimited for the number of devices or users licensed.
- » Full functionality of the software and its features.
- » Unlimited installations of the product as long as the number maximum of seats is not reached.
- » Technical support for all products.
- » Hardware-based deployment available, where applicable.

For more information about GFI Unlimited and its benefits refer to <https://www.gfi.com/gfi-unlimited>

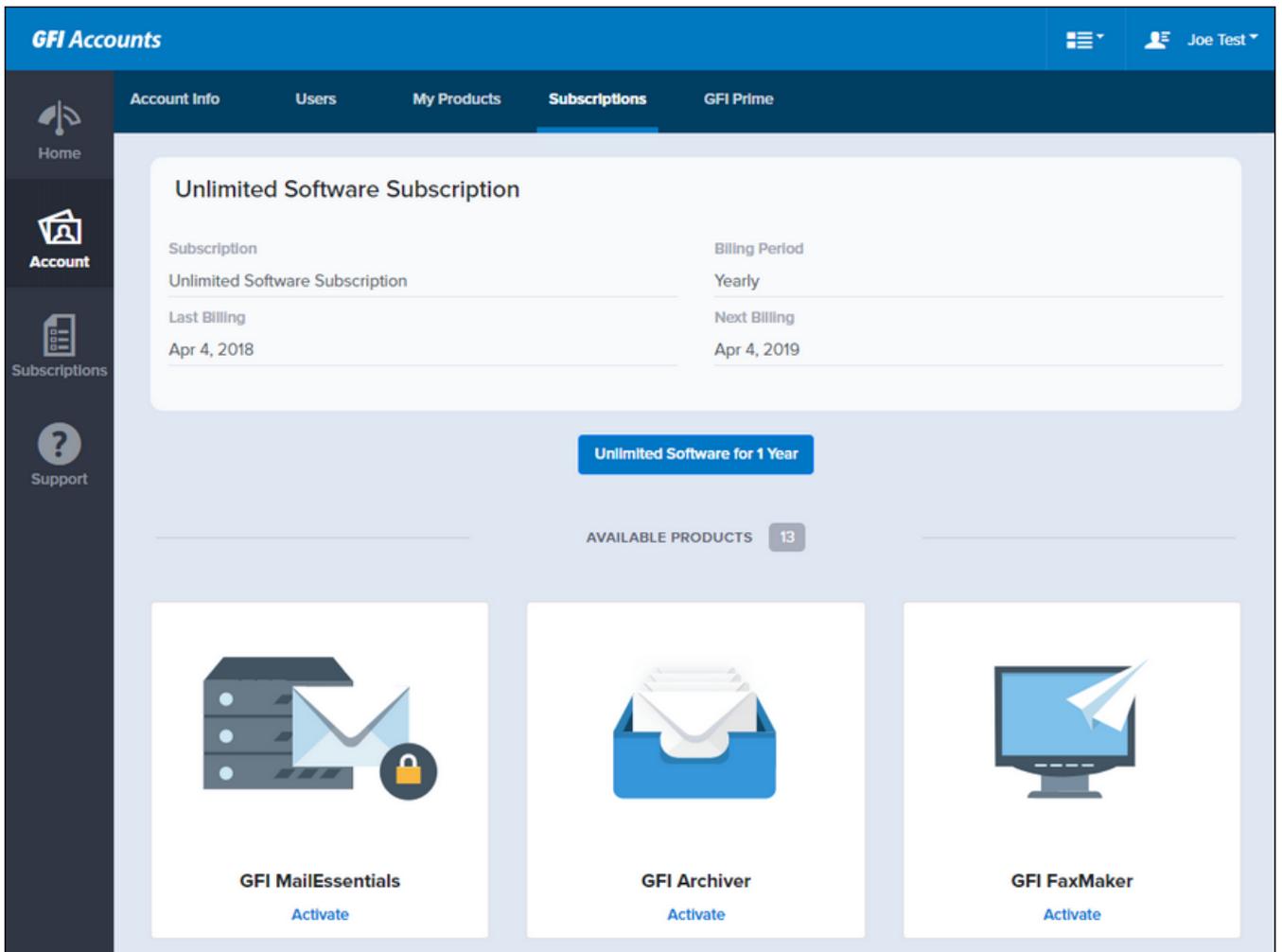
3.5.1 Managing GFI Unlimited

GFI Unlimited is a subscription option that unlocks access to a wide range of software available on the GFI library, through a single subscription. It provides you the competitive advantage of powering your business needs through one simple and powerful system.

If you acquired a GFI Unlimited subscription, follow the steps below to manage your license from the GFI Accounts Portal:

1. [Login](#) to the GFI Accounts Portal
2. Go to **Account > Subscriptions**.

A list of GFI software solutions available for the GFI Unlimited subscription is shown under the **Available Products** area.



Screenshot 11: Subscriptions node on the GFI Accounts Portal

Every product available must be activated to obtain the installer and a license key.

New product installation

» [Activating a product license through GFI Unlimited](#)

Existing product upgrade

» [Updating existing licenses to a GFI Unlimited license](#)

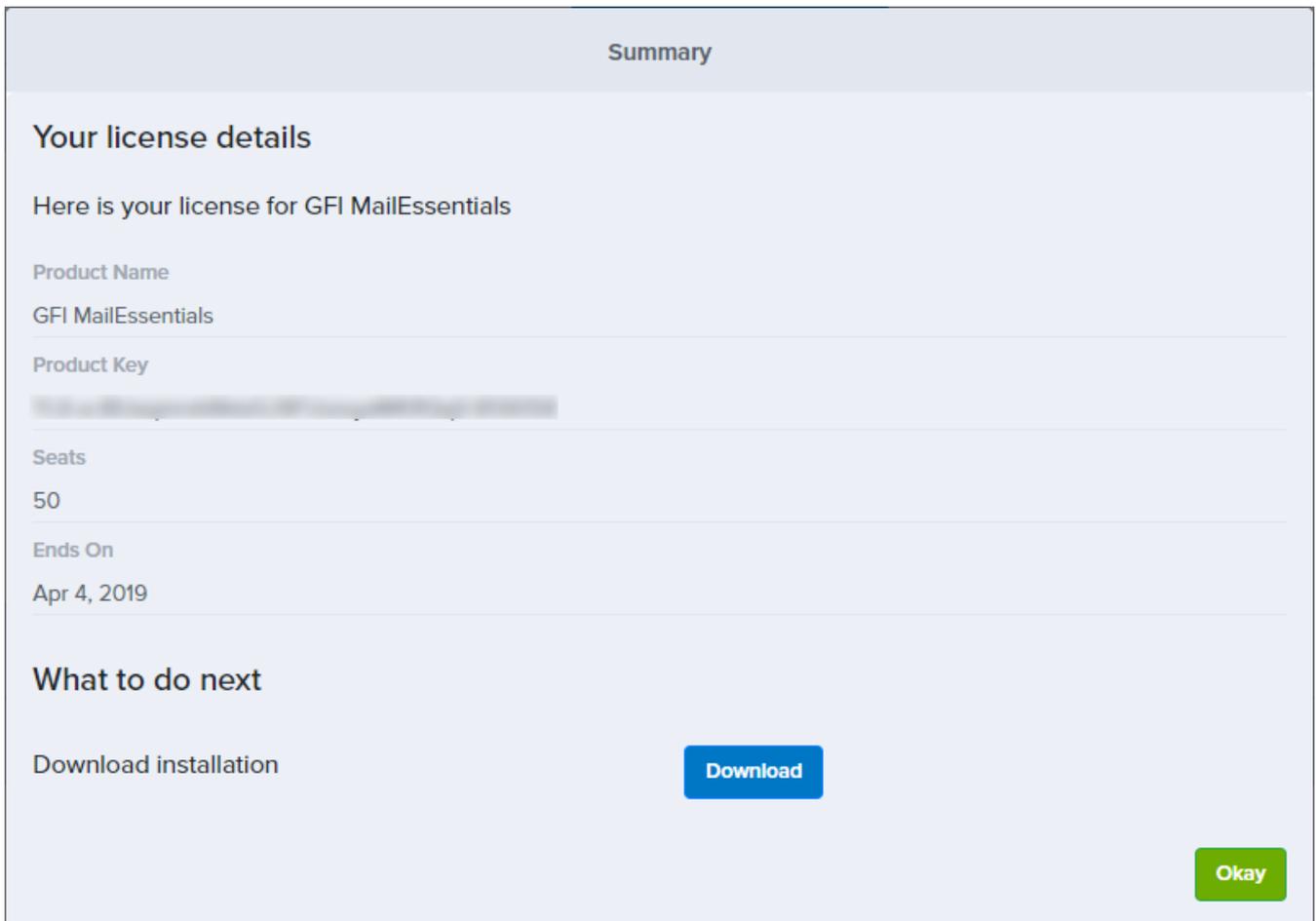
3.5.2 How to activate a product license through GFI Unlimited

If you have a GFI Unlimited subscription, you can generate a license key for any of the included GFI products.

License keys generated through a GFI Unlimited subscription have the same seat quantity and expiry date as that defined by the GFI Unlimited subscription.

To activate a GFI product:

1. [Login](#) to the GFI Accounts Portal
2. Go to **Account > Subscriptions**.
3. Choose a product and click **Activate**.



Screenshot 12: License details of the activated product

4. The license details of the select product are displayed. Click **Activate**.

NOTE

The wizard does not show you a license key?

Certain products do not automatically generate a license, and a license will be manually provisioned for you by the GFI Orders team.

[Click here for more information.](#)

A summary of your product subscription is displayed including the product license key and the option to download the installer.

Next steps:

1. Click the **Download** button to download and install the product.
2. Use the **Product Key** provided or your GFI accounts details during the installation wizard.

NOTE

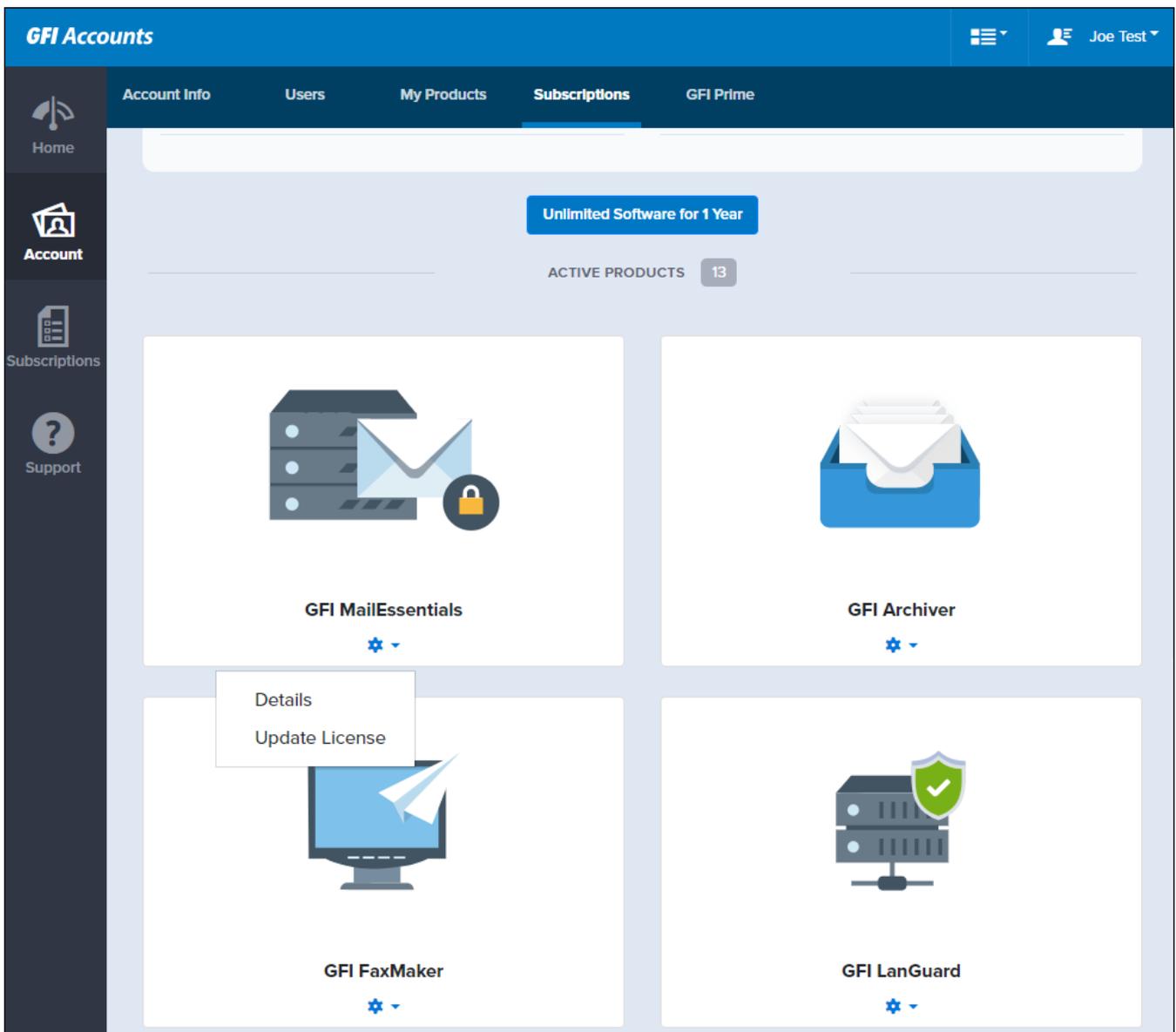
For products that require further account provisioning, you will be redirected to continue setting up the account.

Refer to the documentation of each product for more information on how to install and configure licensing.

3.5.3 Updating existing licenses to a GFI Unlimited license

Customers that already have another subscription type with GFI can also benefit from [GFI Unlimited](#).

For an existing customer to utilize a GFI Product through their GFI Unlimited subscription, that product license needs to be upgraded. The upgrade process generates a license key that can be used to run the software.



Screenshot 13: Update License option under subscriptions

There are two methods to upgrade a product:

Upgrading to GFI Unlimited automatically

A GFI product can be updated automatically:

1. [Login](#) to the GFI Accounts Portal
2. Go to **Account > Subscriptions**.
3. Select **Update License** on specific product that you would like to use.
4. The summary page is displayed. After reviewing the information, click **Update**.
5. A summary of your product is displayed, including the GFI Unlimited license key. Click **Okay**.

Upgrading to GFI Unlimited manually

Products that cannot be updated automatically, require the GFI Orders team to send you the license key:

1. [Login](#) to the GFI Accounts Portal
2. Go to **Account > Subscriptions**.
3. Select **Update License** on the specific product that you would like to use.
4. The summary page is displayed. After reviewing the information, click **Update**.
5. The update request is then sent to the GFI Orders team for processing. Click **Okay**.

Customers and partners are notified once the upgrade is complete and the upgraded license is ready to use.

4 Support

GFI Partners and customers can use the GFI Accounts Portal to contact the GFI Support department. The portal also offers a central location you can use to monitor the statuses of your open support cases.

Topics in this section:

4.1 Opening a support case	25
4.2 Managing open support cases	27

4.1 Opening a support case

If you are experiencing issues with your GFI product, you can open and manage a support case in the GFI Accounts Portal.

For more information, refer to [Managing open support cases](#) (page 27).

NOTE

To avoid delays, make sure to provide your license key or account number with your support request.

Before you open a new case

- » Research the online help and knowledge base for information about known issues and similar problems. See <https://www.gfi.com/support>
- » Ensure you are using the latest build available for your product. New releases have hotfixes and improvements that may solve your issue.
- » For issues related to upgrades, consult the GFI Upgrade Center. See <https://upgrade.gfi.com/>

Opening a new case

To open a new case with support:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Support** and click **Contact Support**.
3. Click **Log a Case**.

GFI

Home

Open Cases

Closed Cases

Knowledge

Log a Case

Back

EMAIL CUSTOMER SUPPORT

GFI PRODUCT*
--None--

COUNTRY*
--None--

VERSION
--None--

LICENSE KEY
License Key

SUBJECT*

MODEL
--None--

SEVERITY LEVEL*
Low

BUILD
Build

TICKET TYPE
--None--

INSTALLED OPERATING SYSTEM
Unknown

DESCRIPTION*

Steps to Reproduce *

Actual Results *

Expected Results *

CONTAINS PERSONALLY IDENTIFIABLE INFO?*
--None--

Add Attachment

SUBMIT

Screenshot 14: Support request form

4. The form loads your contact details automatically. Check if they are correct. To make changes you need to edit your account details. For more information, refer to [Editing accounts details](#) (page 7).

5. Fill in the following fields:

Field	Description
GFI Product	Select your GFI product from the list.
Version	Select the version of your GFI product.

Field	Description
Subject	Enter a subject that summarizes the problem. The description should be short yet complete.
Security Level	Select the option that better describe the impact of the problem on your business: Urgent. Problem is affecting the core business. High. Problem is affecting certain areas related to the business operations. Normal. Problem is slowing down certain business operations. Low. Problem is causing some inconveniences to business or some questions need to be answered.
Ticket Type	Select the option that better describe the field that your issues is related to. Options may differ according to the product.
Country	Select a country from the list. This information is useful to assign your case to technicians that work in your same time zone.
License key	Enter the license key of the GFI product. It is important that your support request form contains either the license key on your account number to verify the validity of your SMA.
Model	When using a hardware product, select the model of the appliance used.
Build	Build number of GFI Product installed.
Installed Operating System	Operating System in which the GFI Product is installed.
Description	Give a detailed account of your problem. Try to answer the following questions: <ul style="list-style-type: none"> » What is the main issue? » When did the problem start? » Any changes in the environment around the time the problem started? Software or hardware updates, installation of third-parties software, etc. » Any step already tried to solve the problem?
Steps to Reproduce	Describe how the support team can reproduce the problem. Prepare a step by step procedure that the support team can follow.
Actual Results	What are the results you obtained when following the steps to reproduce the issue?
Expected Results	What are the results that you expect to achieve when following the steps to reproduce?
Contains personally identifiable info?	Select Yes , if there is any data that could be used to identify people that work for your company. Such cases will be treated under our data protection policy.
Add attachments	Click the link to attach screenshots or a set of log files collected.

6. Click **Submit**.

4.2 Managing open support cases

Proactive case management can shorten the time it takes to get a case solved. To facilitate case management, the GFI Accounts Portal provides customers with a support area, showing their open cases, subjects, status, and severity level.

NOTE

Cases are automatically closed if there is no reply from the client within ninety-six hours (four days).

Tips for good case management

- » Monitor the support area frequently to avoid delays in cases waiting for customer feedback.
- » Read attentively the suggestions given by the support agent and follow their instructions.
- » If the suggestion did not work, reply with an exact description of the steps followed and the results obtained.

Managing open cases

To start managing your cases:

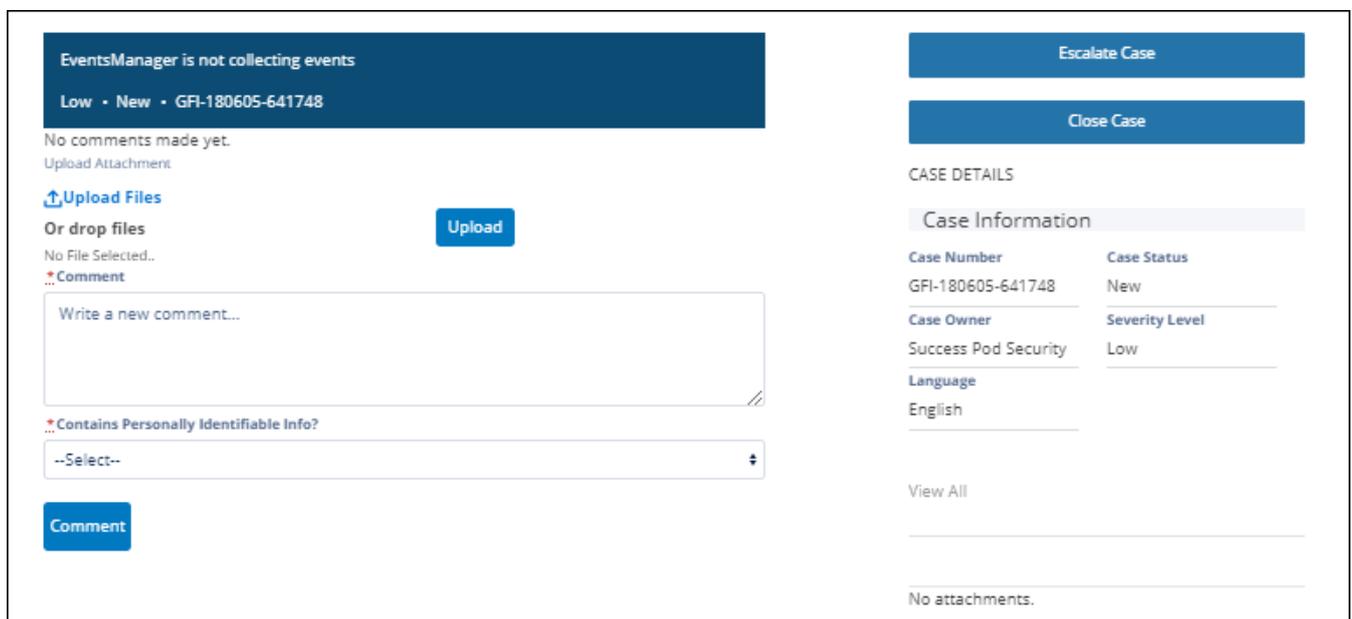
1. [Login](#) to the GFI Accounts Portal.
2. Click **Get support** and click **Contact Support**.



Case Number	Contact Name	Subject	Status	Severity Level	Date/Time Opened
GFI-170728-498851	[REDACTED]	Emails are not archiving	Investigating	No Selection	7/28/2017 8:08 AM
GFI-170728-498852	[REDACTED]	Spam is not being filtered.	Investigating	No Selection	7/28/2017 8:09 AM
GFI-170728-498853	[REDACTED]	Non-Security Patches are not be...	Investigating	No Selection	7/28/2017 8:13 AM

Screenshot 15: List of open cases

3. Click on the case number to see the status of your case.



EventsManager is not collecting events
Low • New • GFI-180605-641748

No comments made yet.
Upload Attachment

[Upload Files](#)
Or drop files
No File Selected..

CASE DETAILS

Case Information

Case Number	Case Status
GFI-180605-641748	New
Case Owner	Severity Level
Success Pod Security	Low
Language	
English	

[View All](#)

No attachments.

Screenshot 16: Details of an open case

4. On the left pane, you can see the case comments. Follow the steps suggested and reply with the results. When requested, attach screenshots, log files or any other attachments.
5. Click **Comment**.

Case details

On the right pane you can see your case information:

Entries	Description
Case Number	Number associated with the case. Quote this number when requesting information about the case.
Status	Displays the status of the case. These options are available: <ul style="list-style-type: none"> » Investigating - support agent is revising the case. » Waiting customer information - support is waiting for clients' reply. » Pending archival - the case is about to be archived if there is no response within twenty-four hours.
Case Owner	The technician or the team responsible to get your case solved.
Severity level	Internal information about the severity and priority of the case. This information is filled by the agent handling your case. New cases have No Selection as default.
Case Origin	Shows the method used to open the case.
Language	Language used to reply to the case. By default all cases are handled in English. If necessary you can request support in another language. The languages available for support are: <ul style="list-style-type: none"> » German » Italian » French » Spanish » Czech

Escalating a case

If there was no reply within the last 24 hours or the case is taking too long to be solved you can click **Escalate Case**. The case will be escalated to a higher level of support or directly to our development team.

Closing a case

Once the case has been solved, you can click **Close Case**.

5 Other resources

If you have not found what you are looking for or if you have any comments, do not hesitate to get in touch with us. All comments are valued and inquiries are treated with the strictest confidence.

In this page you also find links to important information:

Websites

GFI / Kerio Forum: <http://forums.gfi.com>

Support: <https://accounts.gfi.com/Support>

Knowledge Base: <https://www.gfi.com/support/>

Email contacts

To contact sales: sales@gfi.com✉

Customer License queries/accounts.gfi.com assistance: customers@gfi.com✉