Software Releases on Salesforce and the Customer Community

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About this Document

This document is about three things:

1. How clients access software release downloads on the Customer Community.
2. How staff access software release downloads with Salesforce.
3. How staff get software releases published to the Customer Community for clients to download (or to just Salesforce for internal use only).

Where Do Clients and Staff Download Software Releases?

- Clients download software releases and documentation on the Customer Community.
- Staff download software releases and documentation using Salesforce.
- Staff without Salesforce can download software releases and documentation using Box.
- Staff can also access documentation from the Technical Publications SharePoint site.

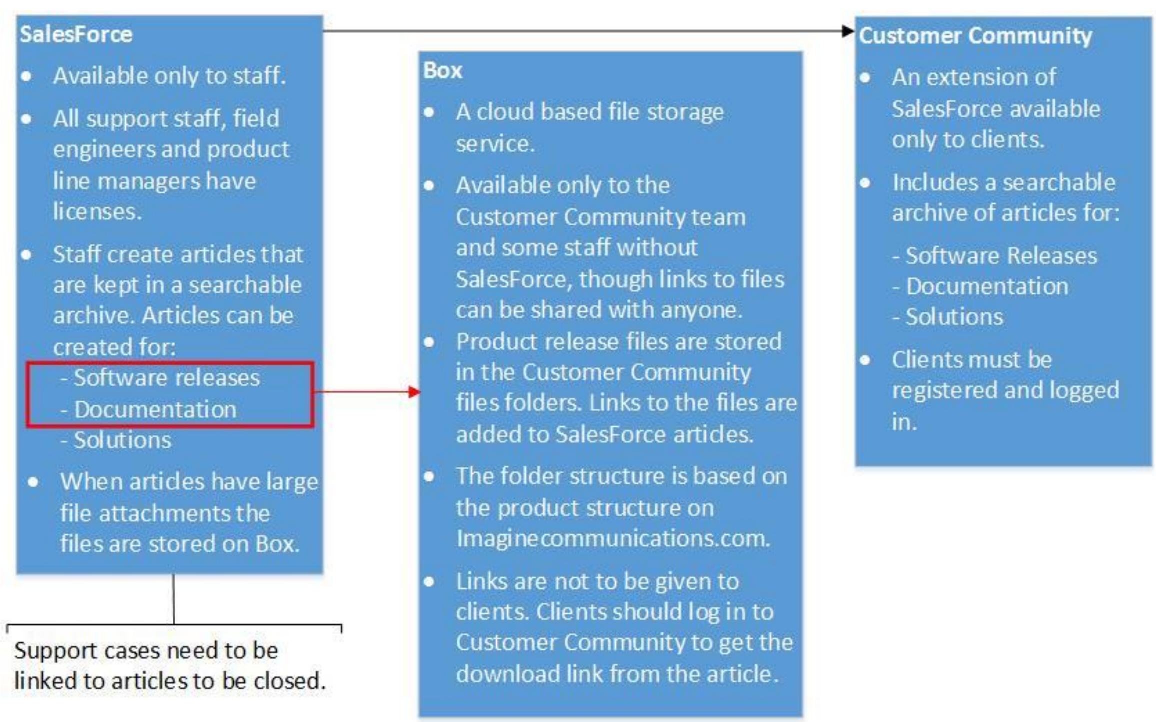
The Customer Community, Salesforce and Box

The Imagine Communications customer support site is known as the Customer Community. Once registered clients can download software releases and documentation, read about support solutions, and create and get information about support cases.

Content on the Customer Community is managed with articles created by staff in Salesforce. These articles are stored in a searchable archive in Salesforce and when an article is intended for clients it is published to the Customer Community. When articles are published they are usually set to appear on both the Customer Community and the Partner Portal (not discussed in this document).

When we want to make software release files available to the public we create a Download article in Salesforce and publish the article to the Customer Community. The actual release files are stored on Box.

The Salesforce, Customer Community, Box Relationship



When we say adding a release to the Customer Community what we really mean is adding it to Salesforce and then making it available to clients on the Customer Community. And to be even more specific, we mean creating the Download article in Salesforce, adding the release files to Box and then publishing the article (with a link to the files on Box) to the Customer Community.

Article types include: Solution articles for support issues, Download articles for software releases and Documentation articles for documents, instructional material or videos. Download and Documentation articles can only be created by the Customer Community team.

A clients who wants to download a release file would do a search for a Download article on the Customer Community Knowledge Base. Download articles have information about the release and a link to the release files. The client then clicks on the link and is taken to a shared folder where they can download the files which are stored on Box. Clients only have access to the folder or file that an article links to and cannot browse the whole file structure on Box.

The Customer Community is the only part of Salesforce that clients have access to. Clients don't get to see all of Salesforce, only the information that we choose to make available to them on the Customer Community. Staff who use Salesforce can see all of the articles that clients do as well as articles that are marked for ‘internal viewing only’ (not set to appear on the Customer Community or Partner Portal).

Staff members who want to download a release file would do a search for a Download article in the Knowledge tab Salesforce. For staff who don’t have access to Salesforce but need to download a software release file, we can add them as a collaborators to product release folders on Box and they can download files directly from there.

Note: Shareable links to the files on Box are not to be given directly to customers. Customers should go to either the Customer Community or Partner Portal to download software release files.

Why Have We Moved to a New System for Accessing Release Downloads?

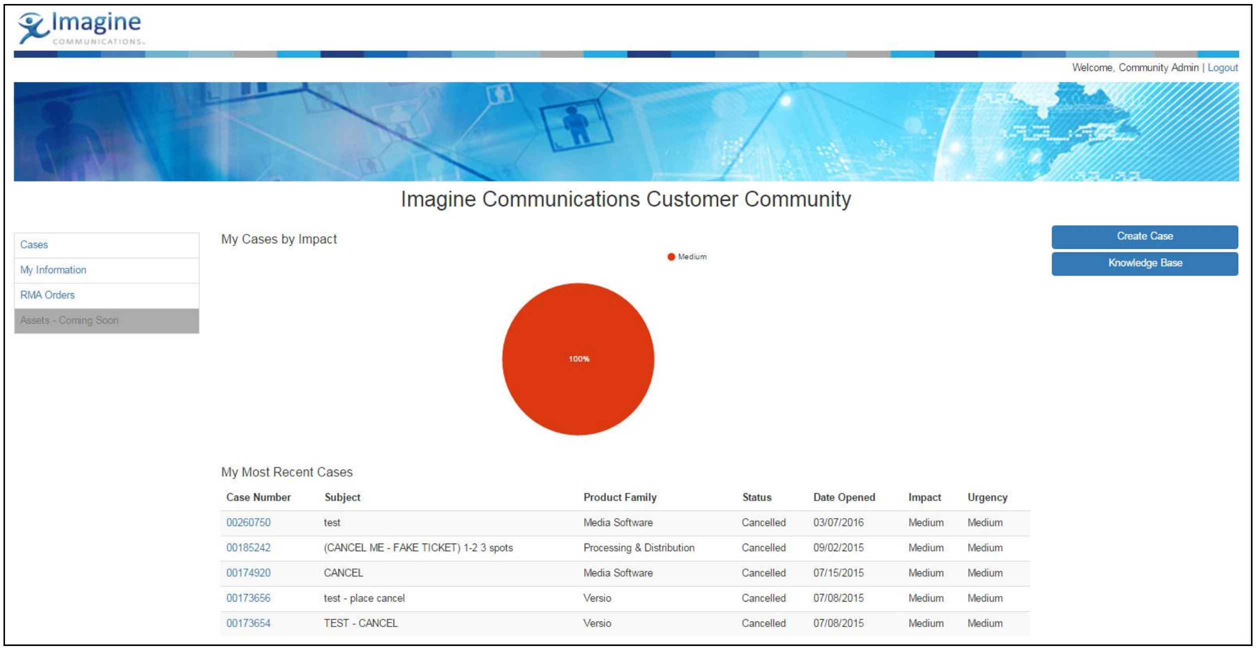
Keeping all of our support information and collateral together in one searchable location helps clients know where to go for online resources and helps the company manage its product support knowledge.

It is also part of our move towards a 'search first' self-directed support initiative which encourages clients and staff to search our knowledge base first to find existing answers to support issues before creating new cases or articles.

Having a customer support site that requires user registration lets us monitor activity and control who has access to our resources. In the future we will also be able to send notifications to specific groups of clients regarding releases and service alerts.

Procedure for Clients to Access Release Downloads on the Customer Community

The Customer Community Customer View



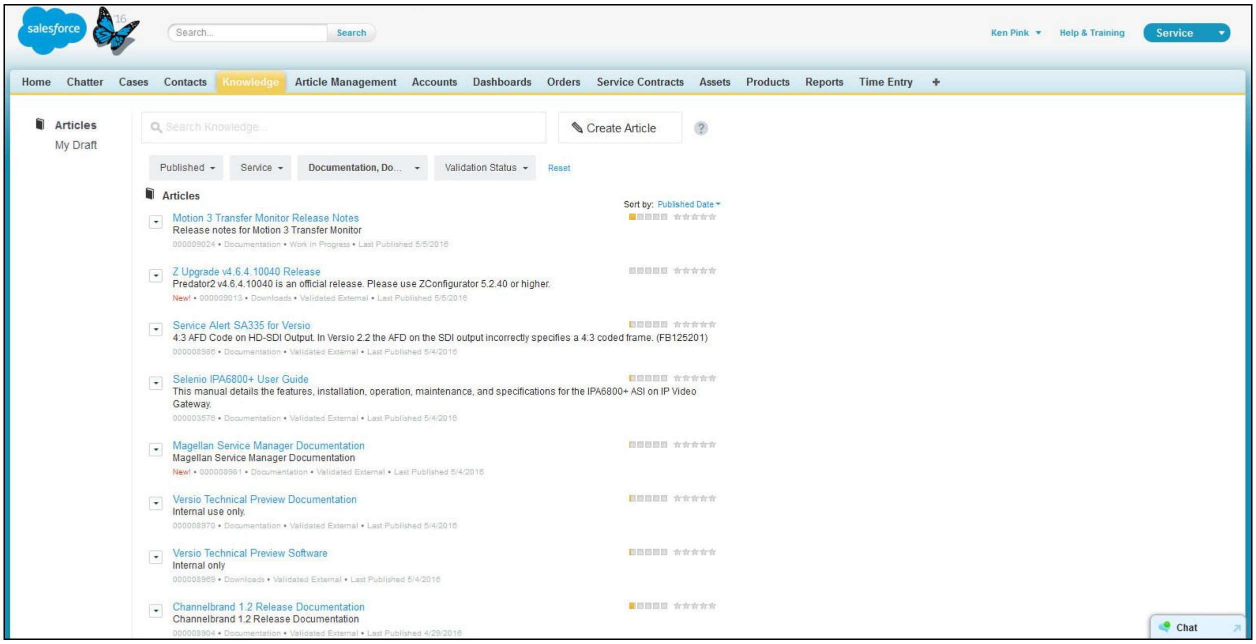
Clients who need to download release files should do the following.

1. Log into the [Customer Community](#).
2. Click on the *Knowledge Base* button.
3. Type the name of the release or product into the *Search Knowledge* field and hit Enter.
4. Use the *Article Types* filters to narrow results.
5. Open an article.
6. Click the link to the release files.
7. Download the files.

Note: To access the Customer Community clients need to register and be logged in. Once registered they have immediate access to the Customer Community Knowledge Base. However, until a staff member changes the default permissions in their user record, they cannot see service cases.

Procedure for Staff to Access Release Downloads using Salesforce

Salesforce Knowledge Tab Staff View



Staff who want to download release files should do the following.

1. Log in to Salesforce.

Note: All service and support employees, field engineers and product managers should already have access to Salesforce. Requests for Salesforce can be made to your supervisor.

2. Browse to the *Knowledge* tab. If you cannot see the *Knowledge* tab click the plus sign (+) on the menu bar and look for *Knowledge*. If it is not available contact IT or create a service ticket.

3. Use the *Search* field to search by name for a release by typing the name of the product into the search box.

4. Use the *Article Types* filter to narrow your search results.

5. From the returned list of results, click on an article. In the article there will be information about the download and a link to the download files.

6. Click on the link to the files to open a folder on Box where the files can be downloaded.

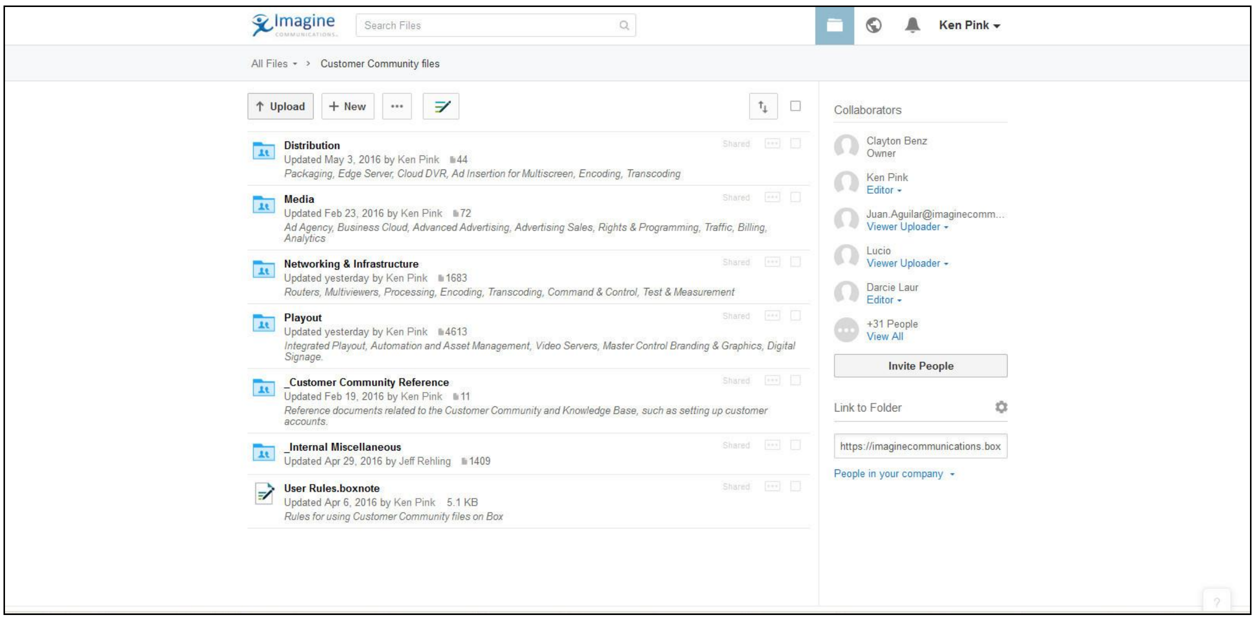
Note: The direct link to the files on Box should not be given to clients.

Procedure for Staff Without Salesforce to Access Release Downloads from Box

Imagine has a Box Business Plan license that we get billed for based on the number of users. This is where the Customer Community files folder is stored. But staff who just want access to that folder should register for a free personal account on Box. This will not use up one of our corporate licenses.

Note: Unless you are using Box account provided by IT, don't use Okta to register or sign in to your Box account.

Box Staff View



Staff who do not have access to Salesforce but need to download release files should do the following.

First, get set up on Box.

1. Register for a free personal Box account using your work email address.
   a. Go to https://account.box.com/signup/n/personal.
   b. Fill in the user registration form.
   c. Click *Submit*.

   Alternatively

   a. Go to www.box.com.
   b. Click on *Sign Up*.

c. Click on *Personal Plans*.
d. Under *Personal Free* click *Sign Up*.
e. Fill in the User Registration form (use your work email address).
f. Click *Submit*.

Next, request access to the Customer Community files folder.

a. Email the Customer Community Box team at portal@imaginecommunications.com.
b. State which product group you need access to and why.
c. The Customer Community team will send you a Box Collaborator invitation. Accept the invitation.

Finally, download your files.

a. Navigate to the file or folder you want to download.
b. Type the name of the release or product into the *Search Files* field or browse through the product folders for your file

Unless you have explicit permission

- Do not change or delete folders.
- Do not add files or folders.

You can store your own files in Box, but you need to create a personal folder outside of the Customer Community files folder.

Procedure for Posting Release Files to Salesforce and the Customer Community

The best way to contact the Customer Community team about new releases is by posting a comment on Chatter in Salesforce to @CustomerCommunitySubmission. You can also send an email to portal@imaginecommunications.com. Ken Pink usually handles all the postings but if he is unavailable Darcie Laur can post them as well.

Please try to give us at least one day advance notice to get things ready. However if there is an emergency where files or articles need to be added, removed or changed, let us know right away.

The Process Overview for Publishing Releases to the Customer Community

Before Release Time

- The Customer Community team needs to be notified with the product name and estimated release date.
- The Customer Community team will create folders in Box and articles in SalesForce to generate links.
- The links to articles will be sent to the technical writers so that they can be added to documentation (if needed).

At Release Time

- Give the Customer Community team all files and documentation. A link to a shared folder on Box is the fastest way.
- The link to an accessible network location also works, but is slower.
- Files will be added to the folders on Box.
- The articles will be made public on the Customer Community.

After the Release

- The links to the articles on SalesForce, the Customer Community (and Box if required) will be sent to everyone involved in the release.

Staff who want software release downloads added to the Customer Community should do the following.

1. Notify the Customer Community team in advance of the release date.

The Customer Community team needs to create product release folders on Box and articles in Salesforce so that the links to the articles and the files can be added to the release documentation if needed. The articles will not be published to the Customer Community until release time.

2. Provide the Customer Community team with the required information about the release.

To create an article we need the following information. Without it we won't be able to publish the release or create the article.

a. The product family. For example Distribution > Packaging > Telurio Packager JITP.

b. The release name and version (as a client would search for it). For example Telurio Packager JITP 5.9 Release. Include the current full product name. Do not use development short forms or acronyms (i.e. TAP5.9).

c. A brief description of the release and the release date. Sometimes summaries are included in release notes, but not always. Sometimes the release notes are the description, but the descriptions we can add to articles have a limit of 1000 characters. Descriptions in Documentation articles have no character limit.

You can use the Products section of the Imagine Communications web site as a reference for current product naming and placement, or contact us if you have questions.

3. Provide the Customer Community team with the release files.
All the release files need to be available to the Customer Community team. They need to be in an accessible location where they can be copied to the Customer Community Box site.

The ideal way to do this is to add them to your own folder on Box and then give us the share link for the folder. You can also be given access to a Box transfer folder where you can add the files. Files can also be uploaded from an accessible network location, but this can take a long time to transfer them.

Employees can get their own Box account by doing the following:

a. Go to https://account.box.com/signup/n/personal.

b. Fill in the User Registration form using your work email address.

c. Click *Submit*.

4. Notify the Community Team when the release is ready to be made public.
The articles will be published to the Customer Community Knowledge Base. Specifically, in the article properties under Channels, *Customer* and *Partner and Public Knowledge Base* need to be selected.