TSANet Connect 2.0

Salesforce User Guide

This document provides the default TSANet Connect Salesforce user experience. Members’ systems may be customized, and this document can be used as a baseline for custom documentation and training.

The following user types are used in this manual.

**Technical Support Engineer:** Staff who are responsible for the resolution of customer cases. This group of users will initiate outbound collaboration requests with other Members and collaborate with Members who make inbound requests.

**Customer Service / Management Team:** This group handles the inbound request process. This documentation shows the manual method for responding to an inbound request, but Members can also implement automation in this area.

# Technical Support Engineer

## Create an Outbound Request to a Member

#### Go to TSANet Cases (LWC located on the Case Form)

* Click NEW – search for a Member, fill out the required fields, and submit

View Screenshots below:

A screenshot of a computer

Description automatically generated

LWC Located on a case form (Could also be an action on the case)

A screenshot of a group of people

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Search for Member

A screenshot of a computer

Description automatically generated

Fill out form

* After submitting the Case will appear under TSANet Cases with status (Open). You can also view the case details in the Case Feed.
* When the other member responds to the case, the TSANet Case will be updated with the Engineer’s contact information. The status will be updated to ACCEPTED, INFORMATION, REJECTED

A screenshot of a computer

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Example Accepted Case

## TSANet Case Status Definitions

#### The following status definitions are used for the TSANet Collaboration Case.

* **Open** (New waiting initial response)
* **Information** (Sent if information is needed to accept or reject)
* **Accepted** (Collaboration Accepted)
* **Rejected** (Collaboration rejected.  For example, end customer does not have support).  This status is not used for solution support.
* **Closed** (set by submitter or auto-close after 30 days of inactivity)

## Working on an Inbound Request from a Member

The inbound process will result in either a NEW case assigned to an engineer or linking to an existing case already assigned to an engineer. The functionality for working on this collaboration is the same as for outbound requests.

**Note**: As Multi Vendor collaborations are complex cases it is recommended that Members assign these cases to experienced Support Engineers and alert management.

## Ongoing Collaboration – Notes and Responses

Click the “create note” from the LWC on the case page to add a note. Once the note has been added, it will appear under the Case Feed and listed on the TSANet Case record.

A screenshot of a phone

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* When the other member adds a **Note** to your case or **Updates the Response**, it will appear under the Case Feed. The note will also be listed under the TSANet Notes section on the TSANet Case. A screenshot of a email

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Example Case Feed Updates

## Closing a Collaboration Case

Submitters can close a case from the LWC. If a TSANet Collaboration case has no activity for 30 days it will be automatically closed.

A close up of a group of words

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# Customer Service / Management Team

The process for responding to inbound collaboration requests can be manual or automated. The process and manual steps are documented below.

## View the Inbound (Open) Requests

The TSANet Cases Object has several List views.

A screenshot of a computer

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*Inbound Open View of TSAnet Cases*

## **Note**: As this is not a high-volume process it is suggested that a notification be set up to the team that manages inbound requests

## Respond to an Inbound Request from a Member

Opening the TSANet Case will show all details related to the request. From this record, the Member would create or link an existing case. The screenshots below show this process.

### View Request Details

The request will have all the information needed to Create or Link to an existing Case.

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*View TSANet Case Details*

A screenshot of a computer

Description automatically generated

*Create or Link Case to the TSANet Case*

### Respond to the Case by clicking the “Approve, Reject or Request Information.”

A screenshot of a phone

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*Action Buttons on the TSANet Case*

A screenshot of a computer

Description automatically generated

*Approving the Request*

After the case is approved, the status will change to ACCEPTED and be linked to the related case. If you select REJECT or INFORMATION, the status will change to REJECTED or INFORMATION.

A screenshot of a phone

Description automatically generated

*Example Case that has been Accepted*

### Exception – Information Requested

**Information requested** status is set if the information provided does not allow for creating a case and assigning to a Technical Support Engineer. This status could also be used when an entitlement issue is found and a customer service team is working on the case. When the TSANet Case is in this status, the user can exchange notes with the submitter to obtain the required information.

A screenshot of a social media account

Description automatically generated

*Case set to Information Requested with Action buttons to add notes)*

### Exception - Rejected

Rejection of the case is similar to sending the Accept response. The user provides details on why the case what rejected and any next steps necessary to re-submit in the future.

**Example**: The end customer is not found in the members system or a supplied serial number is not under support.

**Note**: Best practice is to use the information requested process to try to accept the case. Then, as agreed with the submitter, reject the case.