Member Migration

TSANET CONNECT

A neutral site allowing all partners a single portal to create a **collaboration case** with other Members.

- Simple user interface provides consistent method for creating a collaboration case with other Members
- Process includes integrated escalation management
- API first architecture allows members to integrate their systems

Process Overview

TSANet Collaboration Request to Cisco

TSANet Collaboration Response from Cisco

Cisco has responded to your request (**NetApp Case# 555431 - Questions on error code xyz**). Contact details and Cisco Case# are included below along with any special inspections for working the case.

DO NOT REPLY TO THIS EMAIL. Use the contact details below.

Cisco Case# and Contact details

Cisco Case#: 555459
Contact Name: Joe Cisco
Email: joec@cisco.com
Phone: 225-555-1212

Note
Please use the WebEx Team room below to share files and comment on this case
https://someurl.com

Escalation Instructions:
Escalation instructions from the Member. Should include a escalation contact name and phone. Mary Kay 225-555-1212 or mary@test.com

Have questions or want to change these emails? Contact TSANet

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Respond to NetApp - Case Problem Summary

st Name

Note: Example instrcutions for next ste

Submit

response contact the NetApp Assigned Engineer to work the case.

e troubleshooting steps or error messages

Display information t
(Example Response

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TSANet Collaboration Request from NetApp

This is a collaboration request from **NetApp** on a common customer issue. Please use the details below to enter this as a case and respond by selecting the button below. If you have questions escalate internally to **John Doe**.

Respond to NetApp

Request Details:

NetApp Contact
Name: Test Name
Email: Email
Phone: 225-555-1212
NetApp Case#: 555431

Customer Contact
Company: End Customer Company
Name: John Smith
Email: john@test.com
Phone: 226-555-1212

Problem Details
Summary: This is a test case for this error message
Description: This is the detailed description of the problem. I can include the error message: error 1234 at XXYY. Happens when we try to save settings.
Priority: Priority 2

Have questions or want to change these emails? Contact TSANet

Webinar Series https://tsanet.org/tsanet-connect/

TSANET CONNECT
OVERVIEW

This webinar presented the new features and improvements of the TSANet Connect interface. Topics included an overview of the caller and admin interface, creating a collaboration case, and API Integrations.

VIEW NOW

TSANET CONNECT
ADMINISTRATOR TRAINING

This webinar focused on the Administration interface for the new TSANet Connect call handling process. Topics included inbound and outbound experience for TSANet calls and user administration and migration.

VIEW NOW

TSANET CONNECT
PARTNER GROUPS
Technology / Channel   Solution Support

This webinar focused on how TSANet can be utilized in a Solution Support and/or Technology Partner Program environment. Many members are taking advantage of TSANet in forming and executing the collaboration experience with partners.

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TSANet Connect Releases

Spring 2019
(Apr 2018)

Summer 2019
(May-Jul 2019)

Fall 2019
(Aug-Oct 2019)

First Release

1. Standard Email process and form
2. Member Admin Interface
3. TSANet Admin Interface
4. Partner Groups
5. Limited Member & Sign-up
6. Custom Process Documents

Integrations *

1. Salesforce Integration
2. Zendesk Integration
3. Slack Integration
4. MS Teams Integration

* Based on Member Requirements

Member Feedback

1. Update core system based on Member feedback
2. Refine Integrations based on Member feedback

Basic and Premium Members - Custom Process Forms

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Member Migration Timeline

Phase 1

(Go Live May 2nd 2019)

Phase-2

(Starts May-Jun 2019)

Phase-3

(Starts July 2019)

Phase-1 Members (8)

1. VMware, Red Hat, NetApp, Fujitsu, Citrix, Nvidia, Actian, Nutanix

Phase-2 Release (200+)

1. Phase 1 Members Partner Groups (Limited Members)
2. Selected Premium and Basic Members
3. Any NEW Member(s)

Phase-3 Release (XXX)

1. Remaining Members. 100% Members migrated by end of 2019

Note: Quality driven timeline... We will contact Members to coordinate migration

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Member Migration Checklist

Task	Summary	Milestone
Define Departments	Define what Departments are needed	
Define Partner Groups	Review all Partner Groups	
Define Login Page	Set Login Page Method (Email Auth or Register)	
Define Process Form	Define custom fields if needed	
Define inbound process & Integrations	Define inbound process and any system integrations needed	Ready to Configure
TSANet Connect Setup	Setup TSANet Connect system and make available for review/test	Ready to Test
Create End User Training	Create end user training video	
Train Managers / Admins	Schedule training webinar for managers / admins as needed	
Final Test / Go-Live	Final test for go-live	Go Live

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Summary of Phase-1 Inbound Process

Member	CRM system	Inbound Process	Integrations
Red Hat	Salesforce	Setup a TSANet account to receive the email and log a case. Assigned engineer does initial response and works the case	Email to case
VMware	Salesforce	Customer service team receives the email, logs the case, assigns the engineer and responds to the email	None for inbound. Outbound copy Salesforce case
Fujitsu	ServiceNow	Setup a TSANet account to receive the email and log a case. Assigned engineer does initial response and works the case	Email to Ticket
Actian	Salesforce	Setup a TSANet account to receive the email and log a case (Management also notified). Assigned engineer does initial response and works the case	Email to Case
Nvidia	Salesforce	Small team monitors special TSANet Alias. Logs the case in salesforce, assigns and does initial response	None
Citrix	Salesforce	Small team monitors special TSANet Alias. Logs the case in salesforce, assigns and does initial response	None
Nutanix	Salesforce	Setup a TSANet account to receive the email and log a case. Assigned engineer does initial response and works the case	Email to Case

Note most Salesforce uses selected email-case as this did not require any IT project (simple configuration)

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Salesforce Integration – Inbound for Phase-1

Outbound Request

1. **Easy Access to TSANet Connect**: Provide caller an easy way to get to TSANet Connect from Salesforce. Early view is this should be a button that launches TSANet Connect

2. Pass information needed to make ticket creation easy (engineer email, Case #)

3. Response from receiver comes back into salesforce (email linked to case)
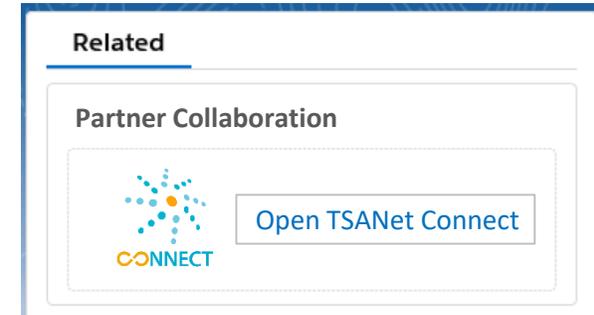
Inbound Request

1. **Enter a new Case**: Use **Email-Case** or Web-Case functionality in Salesforce.   Or if alternative method as defined by Member IT organization.

2. **Initial Response:** Define a workflow that sends an initial response when a new case of this type is assigned to an engineer. It would go to the member contact and BCC TSANet so that we can record the initial response. All ongoing communication is outside of TSANet Connect.
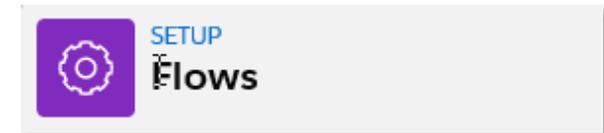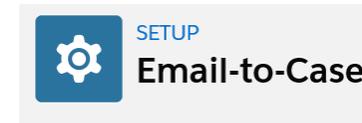
Phase-1 – What we learned

1. Most Members selected the Email authentication link Login page method
2. Many Members used this as an opportunity to simplify and standardize their inbound process
3. All Members used the standard Email process
4. Many Members used Email-Case to automatically create a case: They created an account called TSANet in their CRM to track activity and set specific entitlements and process triggers
5. Most Members did add custom fields – Most common was Product or Product Line selector or serial number for hardware vendors
6. Some members have ability to take emails and add to existing case – This can be used as part of outbound process integration (Sender emails have Case # in subject)
7. Created custom co-branded training slides and recording to train end users

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Next Steps for you...

1. **Contact Paul or Dennis if you want to be in Phase 2 Migration:** If you frequently collaborate with Phase-1 Members that is a good reason to migrate in Phase-2

2. **Get internal buy-in now**: For many this is a change to your inbound process

3. **Remember this is low volume process**: Follow these guidelines...

   1. Make it **easy** for Partners to use

   2. Keep it **flexible**

   3. Start with **simple** integrations and improve over time

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Questions

1. How do we handle data privacy concerns?

The system is designed to remove any issues that may come from Data protection policies

❑ Customer data shared is limited to entitlement only and is removed from the system after initial response.

❑ TSANet Connect only makes the connection between engineers. They then work within their systems and policies to work the issue. This includes any polices related to sharing customer data.

2. How would you handle multiple languages?

Country information is included for both the Partner and Customer contact. This allows members to route the case to an appropriate language based on their internal capabilities. For example a request to work with a common customer in Japan may trigger workflow to assign the case to their Japan team.

3. Who is part of Phase-2?

Contact Paul or Dennis if you would like to be part of phase-2. We will also reach out to specific Members based on Phase-1 Member input

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Contact Us…

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Dennis Smeltzer dennis@tsanet.org