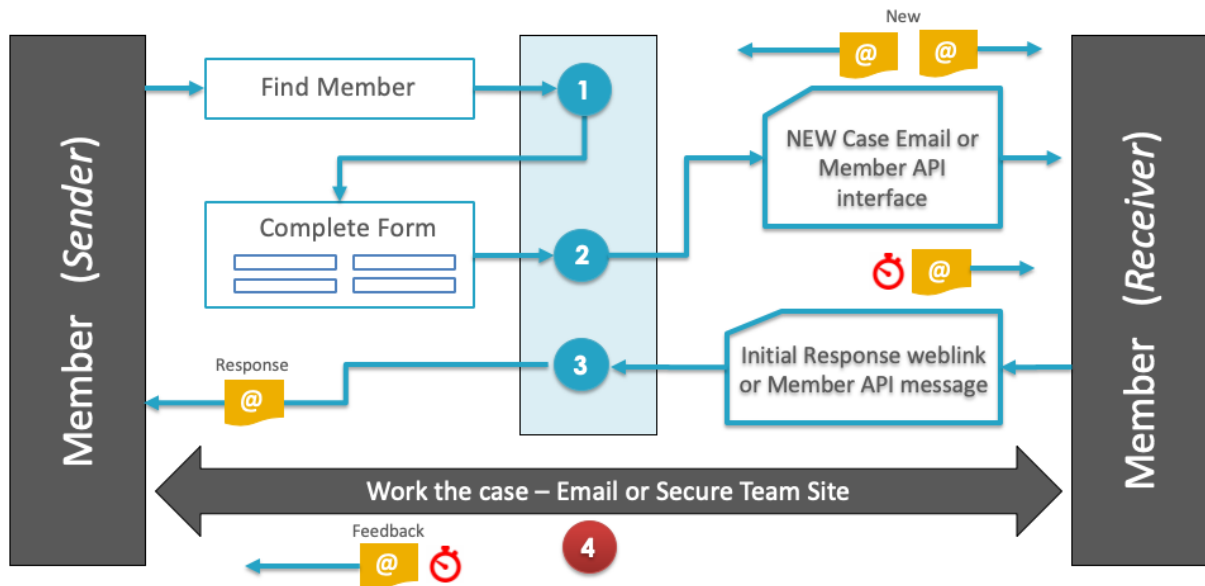




## Inbound Process Best Practices

This document provides Basic and Premium Members information on how to setup their inbound TSANet process. TSANet Connect has been designed to provide a simplified method for requesting collaboration and methods exist to easily integrate this to your existing support processes. The process for requesting collaboration is shown in the picture below and is designed to connect the engineers and case numbers together so that collaboration can continue outside of the TSANet Connect platform using the members standard systems and processes.

### Standard Email Process Overview



## Process form options

Basic and Premium Members have the ability to do the following with the Process form:

1. Define the Process form Type (Standard, Solution Support, MS Teams Integration)
2. Add Custom Fields to the Problem and Customer Section
3. Add a Note to the top of the form
4. Define the Email Template used

## Process Form Type

TSANet Connect supports the following Process form types.

1. **Standard Common Customer** – This is the default for common customer collaboration requests. This form has 3 sections (Partner, Problem and Customer)
2. **Solution Support** – This is a more flexible form that has 3 sections (Partner, Problem, Additional Information). The additional information section is fully custom). Some uses for this form are:
  - a. A custom relationship with a Partner where Partner A supports the customer and escalates “Technical” issues to Partner B
  - b. A Custom relationship where Partner A supports the overall product and only escalates defects to the engineering group for Partner B
3. **MS Teams Integration** - This is a process that integrates to Microsoft Teams and creates a channel for ongoing collaboration of an issue. A similar process can be designed with other collaboration platforms such as Slack or WebEx Teams

## Custom fields

Members can add custom fields to both the “Problem” section and the “Customer” section. Some examples of custom fields are below:

- **Problem Area:** A pulldown field with defined list of values that allows a company to route the request to the correct team
- **Product Version:** A free text field that a user can enter product version information
- **Serial Number:** For members that sell hardware a serial number is often used to define entitlement and case routing

- **Dynamic Dropdowns:** It is also possible to design dynamic drop downs. For example, a product Area field could populate a related list of products that the user selects

## Process Note

Members can add a NOTE to the top of the form highlighting specific instructions or form requirements. For example, the note could highlight more information about a specific field.

The screenshot shows the top of a form for Cisco Systems Inc. The header includes 'Support Hours 7/24/365', the company name 'Cisco Systems Inc.' with a star icon, and 'Products Supported All'. A red arrow points to a 'Note' box containing the text: 'Note: This form requires a valid customer CCOID. CCOID is the end customer contacts userID they use to login to the Cisco Web.' Below the note are two contact sections: 'TSANet Inc. Contact' with a user icon and the text 'Changes will update your profile.', and 'Common Customer Contact'. The TSANet section has two input fields with the values 'Paul' and 'Esch'. The Common Customer Contact section has two input fields with the placeholder text 'Enter Customer Company' and 'Enter Customer Name'.

## Parent – Child Forms

Members can define Parent – Child forms to help guide users to the correct process. This is helpful for large organizations that may have different departments with unique inbound processes. The Parent form is a high-level form that asks a question and provides selections that direct the users to the correct child process. An example of this is shown below.

The screenshot shows the top of a form for IBM | Ansible. The header includes 'Support Hours', the company name 'IBM | Ansible' with a star icon, and 'Products Supported'. Below the header is a light blue bar with 'Internal Notes: View More...'. A 'Note' box contains the text: 'Note: This is for support of the Ansible product. Please select a product area below'. Below the note is a dropdown menu with the text 'Choose Product Area' and a downward arrow icon.

Choose Product Area 

## Email Templates

Members can request different email templates for inbound cases. The list of available templates is below and TSANet can work with Members as needed to create new templates.

- **Default:** This is the standard form and recommended for most Members
- **Product in Subject:** This form places the “Product” selected from a custom field in the subject. This is used for Members that may want to setup inbound rules to route based on Product
- **TSANet Token in Subject:** This form places the “TSANet Token” in the subject. This is used when a Member wants to look at the auto-response method
- **Text Only:** This form sends a text version of the email. This is helpful for Members that would like to program their system to extract data from the email
- **Custom:** For Premium Global Members we can also create a custom template

## Inbound Process Options

The table below provides a summary of the inbound process options and each method is described in the sections below. The inbound volume for most Members is very low with an average of 3 request per month. The complexity of a multi-vendor case is also high, and it is recommended that your process routes these issues to senior support agents.

Method	Pro	Con	Recommendation
(1) Define an alias to receive the inbound request. Assign a very small team to this alias for review and assignment of the request	Simple to setup and provides a level of review before assigning to an engineer	Team should be able to provide 7*24 coverage.	<b><u>For most Members this is the best setup.</u></b> As volume increases you can move to more automation
(2) Use the Email-Case functionality on your ticketing system	Simple to setup as most systems have this as native functionality	For large organizations this may require a separate queue to make sure it is properly responded to and assigned	For Members with systems such as Salesforce, Zendesk or Service Now this is a good option
(3) Use the Email-Case and the email response workflow on your ticketing system	Removes the need for manual response to the request	More complex to setup in the CRM system	For members with higher levels of inbound requests that want to route directly to agents this is a good option
(4) Use the API on your ticketing system. TSANet Connect sends API message to your system to create a case	Provides the best integration the Members CRM system	Unless existing well defined API is in place for the Member CRM system this can be hard to justify cost for the volume of requests	Only use this method if volume is high and existing API is in place

## (1) Define email alias with small team

Manually receiving and processing inbound requests is the most common option. This method is quick to setup and allows a small number of staff to work these complex issues. The requirement of the alias and the users are below:

1. The alias must be configured to accept external emails. All emails come from [connect@tsanet.org](mailto:connect@tsanet.org)
2. To respond to the request users do not need to have a login to the TSANet Connect system as they can use the “Respond to” button in the email

Below are some strategies that Members have used when using an alias

1. Use an existing alias such as [support@xxx.com](mailto:support@xxx.com) or [dutymanager@xxx.com](mailto:dutymanager@xxx.com) and train those users on how to respond to and assign a collaboration request
2. Setup a new alias such as [tsanet@xxx.com](mailto:tsanet@xxx.com) and setup a small team to respond and assign the cases

See **Appendix-1 Responding to a request** for instructions on how to respond

## (2) Use Email to Case

Most ticketing systems (Example, Salesforce, ZenDesk, Jira and Service Now) have a native email to case feature that can be configured to take the inbound email and create a case. Below are some strategies that Members have used when using this feature.

1. Create an Account in the CRM system for TSANet. Contact is [connect@tsanet.org](mailto:connect@tsanet.org)
2. Place special handling rules or notes on that account to respond and assign the case

See **Appendix-1 Responding to a request** for instructions on how to respond

### (3) Use Email to Case with Auto-response

In addition to email to case functionality many ticketing systems can send an email based on specific triggers. Engineer assignment of a TSANet request is used to trigger an email in the following format. With this level of integration, it is not necessary to manually respond to the request.

- Send to [connect@tsanet.org](mailto:connect@tsanet.org)
- Subject must have the string **TSANET AUTO RESPONSE**
- Body must contain each field in the following format **\*\*\*field: value\*\*\***
- Body must contain the **TSANet Token** that is included in the original email

Below is an example email:

**To:** TSANet Connect <connect@tsanet.org>

**Subject:** TSANET AUTO RESPONSE mloqU8zEg1rgv9KU9Oyf 012345678

\*\*\*Case: 012345678\*\*\*

\*\*\*Engineer Name: Joe Smith\*\*\*

\*\*\*Engineer Email: joe.smith@company.com\*\*\*

\*\*\*Engineer Phone: 888-888-8888 \*\*\*

\*\*\*Next Steps: An engineer has been assigned and will contact you.\*\*\*

\*\*\*TSANET Token: mloqU8zEg1rgv9KU9Oyf\*\*\*

**Note:** All fields must be sent but default data may be provided. For example, your main support phone number can be provided as the engineer phone.

**Note:** Best practice is to also include the TSANet Token and your case number in the subject to aid in troubleshooting any issues

#### (4) Use CRM or Middleware API

TSANet Connect can also be configured to use the API of a Members CRM or Middleware. If your company has an existing API that is used for creating a case, contact TSANet to discuss the details of this method. With this level of integration, a case can be more accurately created in the members system. Below is a high-level view of this type of integration.

1. A secure connection is made between TSANet Connect and the Members system
2. The Members Process form is designed to capture the information needed to create a case
3. When the user submits the request TSANet Connect sends a POST JSON message in the xml format defined by the Members system
4. The Members system responds with the Case Number created

**Note:** For this level of integration the Member must be **Premium Global**



## Appendix-1: Responding to the request

An email will arrive from [connect@tsanet.org](mailto:connect@tsanet.org) containing all of the information needed to respond and collaborate with the Member. Complete the initial response by selecting the “Respond to” button in the email. The respond to button will take you to a form to enter the following information.

**Your case Number:** This is the case number in your system

**Your Assigned Engineer:** The Assigned Engineer

**Engineer Email:** The Engineer email or email used to update the case

**Engineer Phone:** The Engineer phone or main support phone

**Note:** Any note that you want to send to the other Member

Screenshots showing an example email and response form are shown below

**Note:** This response completes the action for TSANet Connect. Members then work in their own CRM system to work the issue

**Note:** Responding to the request does not require a login to TSANet Connect

## TSANet Collaboration Request from TSANet Inc.

This is a collaboration request from **TSANet Inc.** 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 **Britt Jimerson** [brittjimerson@gmail.com](mailto:brittjimerson@gmail.com). You must respond with assigned engineer within the SLA defined below:

Initial response by the next business day. The Mutual Customer's entitlement with member may affect response times

[Respond to TSANet Inc.](#)

### Request Details:

#### TSANet Inc. Contact

Name: *Brittany Jimerson*  
Email: [brittany@tsanet.org](mailto:brittany@tsanet.org)  
Phone: *US: (913) 345-9311*  
Case#: *TestCase123*

#### Customer Contact

*Customer Company: Dummy Account*  
*Customer Name: John Smith*  
*Customer Email: [jsmith@dummyaccount.com](mailto:jsmith@dummyaccount.com)*  
*Customer Phone Including Country Code: US: (913) 547-8744*  
*Customer Case # with Abc computer (Optional): ABC123*

#### Problem Details

Summary: *Test Case Submitted – Required Action*  
Description: *This is a TSANet Test Case submitted to validate your process for working collaboration requests from a TSANet partner. You must acknowledge this case with the "Respond to TSANet" button.*  
Priority: *Low - P3*

Have questions or want to change these emails? [Contact TSANet](#)  
TSANet Connect Token: F0OijaD0US64YFd7RKV5

### Respond to TSANet Inc. - Case Problem Summary

**Abc computer Case Information**

Abc computer Case Number	Note: Example Instructions for next steps
Assigned Engineer First and Last Name	
Assigned Engineer Email	
<input type="text" value="US"/> Assigned Engineer Phone	
<input type="button" value="Submit"/>	

*Note! After Submitting your response contact the TSANet Inc. Assigned Engineer to work the case.*

**Case Information:**

TSANet Inc. Case#: TestCase123  
Assigned Engineer: Brittany JImerson  
Email: [brittany@tsanet.org](mailto:brittany@tsanet.org)  
Phone: US: (913) 345-9311

**Customer Info:**

Customer Company: Dummy Account  
Customer Name: John Smith  
Customer Email: [jsmith@dummyaccount.com](mailto:jsmith@dummyaccount.com)  
Customer Phone Including Country Code: US: (913) 547-8744  
Customer Case # with Abc computer (Optional): ABC123

**Problem:**

Summary: Test Case Submitted - Required Action  
Description: