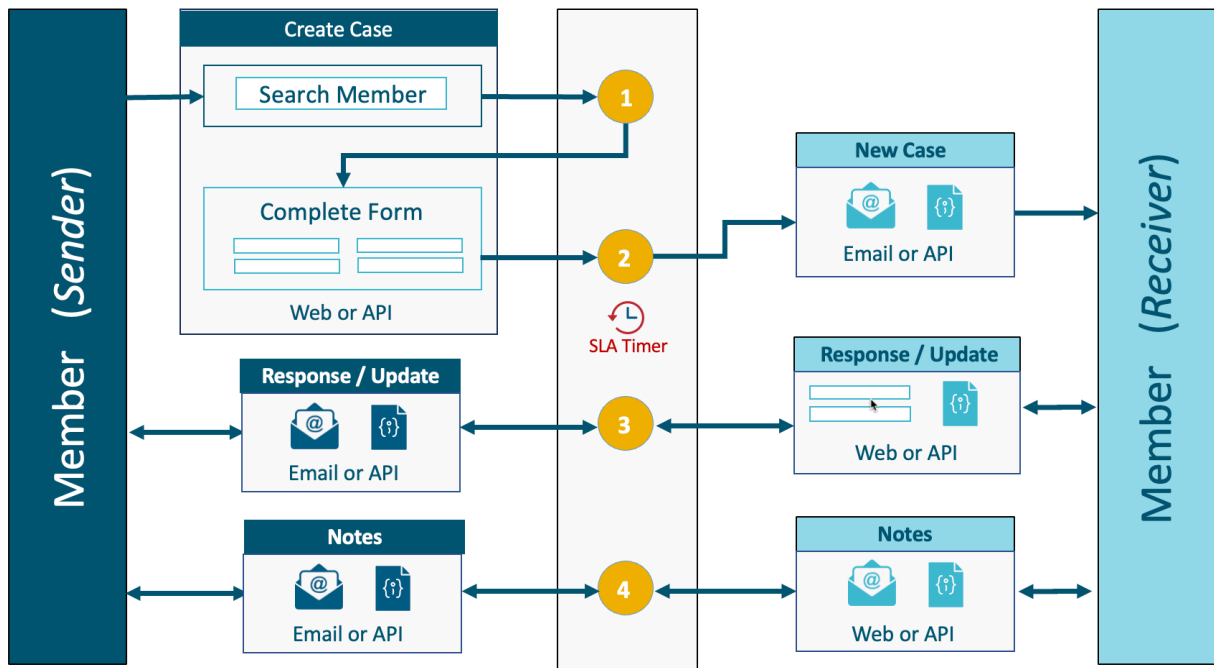




## Inbound Process Best Practices

This document provides TSANet Members with information on how to set up their inbound TSANet process. TSANet Connect has been designed to simplify the process of requesting collaboration, and methods exist to integrate this into your existing support processes. The process is shown in the picture below. The new TSANet Connect 2.0 system expands functionality to include ongoing updates and notes. Integration methods and apps are also available to Elite Members.



TSANet Connect Process

This document provides options and best practices for the Receiver side of the process above.

## Process form options

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

1. Define the Process form Type (Standard, Solution Support)
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 three sections (Partner, Problem, and Customer)
2. **Solution Support** – This more flexible form has 3 sections (Partner, Problem, Additional Information). 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. (Example OEM relationship)
  - b. A Custom relationship where Partner A supports the overall product and only escalates defects to the engineering group for Partner B

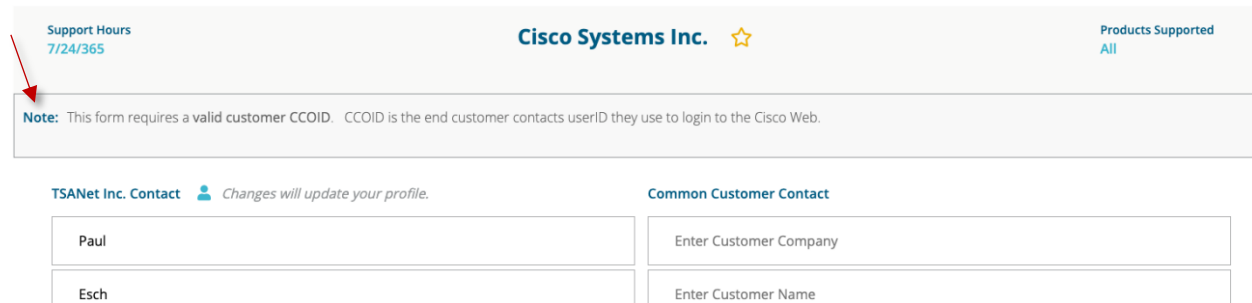
## Custom fields

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. At the top left, there is a 'Support Hours' section with the text '7/24/365'. In the center, the company name 'Cisco Systems Inc.' is displayed with a star icon. At the top right, there is a 'Products Supported' section with the text 'All'. Below the header, 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, there are two contact sections. The first is 'TSANet Inc. Contact' with a user icon and the text 'Changes will update your profile.' It contains two input fields: the first contains 'Paul' and the second contains 'Esch'. The second section is 'Common Customer Contact' and contains two input fields: the first is labeled 'Enter Customer Company' and the second is labeled 'Enter Customer Name'.

## 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
- **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 summarizes 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 requests per month. The complexity of a multi-vendor case is also high, and it is recommended that your process route 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 for P1 and P2 requests	<b><u>For most new Members this is the best place to start.</u></b> As volume increases you can move to more automation
(2) Use the Email-Case functionality on your ticketing system	Simple to setup and new request part of ticketing system workflow.	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) Integration to your ticketing system.	Provides full integration the Members CRM system	Must be an Elite Member	Recommended for Elite Members
<b>Integration options</b> <a href="https://www.tsanet.org/api-integrations">https://www.tsanet.org/api-integrations</a>			

### (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 assign 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) Integrate to your system

TSANet Connect can also be integrated into your ticketing system. More information on this option can be found at <https://www.tsanet.org/api-integrations>. Contact TSANet at [membership@tsanet.org](mailto:membership@tsanet.org) to discuss the details of this method.

**Note:** For this option, the Member must be **Elite**

## Appendix-1: Responding to the request (Method 1 and 2)

You will receive an email from [connect@tsanet.org](mailto:connect@tsanet.org) containing all 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 where you can 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:** Options also exist to request additional information as needed or reject a collaboration request.

**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: `F0OijaD0US64YF7RKV5`



### 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: