

1.0 Purpose and Scope:

The purpose of this procedure is to define the steps necessary to create a Salesforce “Customer Support and Service Case”

2.0 References

N/A

3.0 Definitions

N/A

4.0 Procedure:

Opening a Support Case

4.1- Log into Salesforce, selecting the option of “cases” across the top of the pane and create a new case by selecting “New” button.

Note: It is assumed that a user account has been created and the user has permissions to create a support case. If not, please contact your system admin for assistance.

4.2- Complete the “New Case” form by inputting the following parameters:

Account Name: Type in name of business

Contact Name: Type in name of person communicating issue

Product Vendor: (Options are Myricom or Multicomputer)

Operating System (OS): (Options are Linux, Windows, VMware, OS X, None or BSD)

Subject: This is a high level explanation of the issue. It should be noted Please attempt to be as detailed as

Description: This is a detailed explanation of the issue.

Customer Company: Copy/input the account name as identified

Case Origin: How did the case get created (web, email, phone or chatter news)

Status: new, in progress, waiting on customer feedback, closed, escalated, eval, in engineering, on hold, RMA cycle.

Note: It is assumed that field parameter definitions do not need to be defined or explained but as we evolve we may add, change or delete fields.

4.3-Once all data has been added into the page, save the data. If no inconsistency or errors are encountered the case has been successfully completed. If data needs changing, make corrections and save the parameters. A numeric number is created and is associated to the issue.

4.4- As stated in step 4.3 the Salesforce case has been created. Add case comments (public or private), and communicate to the customer via email. This can be done using templates for specific messages or can be written freehand. Send communication as needed.

Communicating to a customer in a Support Case

- 4.5- A case has two methods to communicate. The first is “case comment” and the second is “send an email”.
- 4.6- Select a “case comment”. Type in the communication that you want sent to the customer. Select “public” and save the communication.
- 4.7- Second, “send an email”. The SF email mechanism allows the user to either create an email or use an email template. Select the method you desire and sent the email as needed.

Adding a private customer note in a Support Case

- 4.8- Select a “case comment”, Type in the data that you need preserved for the issue and save the information.

Maintaining the Support Case

- 4.9- Using the case notes (public and internal) and the SF email mechanism, update and communicate the case information as required/needed.
- 4.10- It is highly recommended to update the status of the case based on customer communication. Example would be place the case in “awaiting customer feedback” if you are waiting for a bug report or “In Progress” if you are reviewing a bug report.

Creating a Jira Case from SalesForce

- 4.11- In certain instances, Engineering will need to be engaged. Select the “Create a Jira” case button. The SF case information shall be pushed into the Jira case. Please follow the steps to create a Jira case and communicate to Engineering as required.

Note: It is highly recommended that you add a case not within salesforce making note of the Jira number. It is also highly recommended that you change the status of the SF case to “Awaiting Engineering” as needed.

Closing the Support Case

- 4.12- Standard practice will be to request authority from the customer that the case be closed. Once authorized, depress the “case close” button. Verify the case summary and parameters are correct and close the case. Please add a note if needed to explain a case summary.

Note: In some cases, it will be the discretion of program management if the case can be closed.

REVISION HISTORY

<u>CO</u>	<u>Date</u>	<u>Description of Change</u>	<u>Rev</u>
	8/3/2016	Initial release	1

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