

# Transition a Project to Support

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## Purpose

For new customer implementations, when the project deliverables have been met, the Project Manager (PM) will transition the customer over to the Support team. The transition signifies the end of the Services project and future questions/issues regarding the product will be triaged by the Support team.

On occasion, the project may have a few minor deliverables that do not impact the functionality of the standard product (a custom tool for example) that may remain open as the sole item on the project. This is at the discretion of the PM to manage and continue to work with the customer until the item is delivered in full.

The purpose of this document is to walk through the steps for setting the customer up for the transition to Support and the template used during the transition call.

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## Migrations

For customers already using a Bold product the customer has already been introduced to support, therefore no hand off call meeting is required. However, the customer should be reminded of the support process. The following information should be shared with the customer prior to closing the project:

1. Customer is fully live and working in the product application for their daily activities as of:
2. Pending items:
3. Custom Applications:
4. Provide Support Manager contact information:
  - a. Resource:
  - b. Title:
  - c. Email:

d. Phone:

5. Provide support ticket creation material:

a. Website: <https://support.boldgroup.com>

b. [Bold Group Customer Support Portal](#) document

c. Discussed Support Scope

i. Software not working as designed - Support

ii. Software working as designed but need help on use for your business - Services

i. Cases in this category will be routed to Services for assistance/quoting as necessary

d. Turnaround times

i. High impact - target within 24 hours

ii. Not business impacting - a few days

iii. SedonaOffice - New User Setup/Duo - dispatch team will handle same day

i. Suggest Advanced Security if not owned, if owned provide link to training video  
Whitelisting in [TSPlus Advanced Security](#)

6. Project meetings - will discontinue (if applicable)

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## New Implementations

For brand new customer on any Bold product the following sections should be followed

### Create Portal Access

Prior to the handoff to support, the customer should be granted access to the Customer Portal to log support cases post-

transition. Follow the steps below to confirm the customer has access:

1. Ask the main resource if they want to see all cases submitted by all their users or if they will be the main resource for submitting cases
  - a. We recommend that one super user of the product be the main point of contact and review all issues prior to submitting to Bold Group. This prevents untrained users outside the area of expertise from submitting questions their power user can answer or gather more detail for submission and faster resolution
  
2. Create a support case for the main resource
  - a. see case [00041923](#) as an example
  
  - b. Include the following info:
    - i. Description: Please provide Customer Portal access for customer resource name:
  
    - ii. Company Name:
  
    - iii. Customer Number (with the BoldGroup): Product Line Account #
  
    - iv. Employee Name: First and Last:
  
    - v. Employee email:
  
    - vi. Employee telephone number – we need at least one telephone number
      - i. Office telephone number:
  
      - ii. Mobile telephone number

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## Transition Call

When the project is ready to transition to Support, schedule a 30-minute call with the Support Manager and customer for the product line. Agenda for the meeting;

1. Introduction to Support
  
2. Customer current status of product usage
  
3. Pending items
  
4. Custom applications (if any)

5. Support ticket creation
6. Support scope
7. Turnaround times
8. Project meeting schedule
9. Review action items

Prior to the call, from the Transition to Support task:

1. Create a recap email from the template: [Transition to Support - New Implementation](#)
  - a. The template will have the talking points in more detail.
  - b. Fill in the details to prepare for the call
  - c. Example:

Subject	Call Recap - {{{TASKRAY__Project__c.Name}}} Transition to Support
HTML Value	<p>Hi All,</p> <p>Thank you for your time on today's call to discuss your project transition to Support. Please see the recap below:</p> <p><b>Meeting Details:</b></p> <ul style="list-style-type: none"><li>• Start Time:</li><li>• End Time:</li><li>• Customer Attendees:<ul style="list-style-type: none"><li>◦</li></ul></li><li>• Bold Group Attendees:<ul style="list-style-type: none"><li>◦</li></ul></li></ul> <p><b>Today we discussed:</b></p> <ul style="list-style-type: none"><li>• Introduction to Support<ul style="list-style-type: none"><li>◦ Resource:</li><li>◦ Title:</li><li>◦ Email:</li><li>◦ Phone:</li></ul></li><li>• Customer is fully live and working in the product application for their daily activities as of:</li><li>• Pending items:</li><li>• Custom Applications:</li><li>• Support Ticket Creation Walk Through<ul style="list-style-type: none"><li>◦ Website: <a href="https://support.boldgroup.com">https://support.boldgroup.com</a></li><li>◦ Bold Group Customer Support Portal Document (attached)</li><li>◦ Discussed Support Scope<ul style="list-style-type: none"><li>▪ Software not working as designed - Support</li><li>▪ Software working as designed but need help on use for your business - Services<ul style="list-style-type: none"><li>▪ Cases in this category will be routed to Services for assistance/quoting as necessary</li></ul></li></ul></li><li>◦ Turnaround times<ul style="list-style-type: none"><li>▪ High impact - target within 24 hours</li><li>▪ Not business impacting - a few days</li><li>▪ New User Setup/Duo - dispatch team will handle</li></ul></li></ul></li><li>• Project meetings - will discontinue (if applicable)</li></ul> <p><b>Action items:</b></p> <ul style="list-style-type: none"><li>•</li></ul> <p>Thank you, {{{Sender.FirstName}}}</p>

During the call:

1. Add any additional notes
2. Link any missing documents referenced in the call
  - a. [Bold Group Customer Portal.pdf](#)
3. Once the call is completed, send the email to the customer and copy the Support Manager that was on the call

The Transition to Support task can now be completed on the project.

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