Product Enhancement - Submit a case

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This document covers the steps required to submit a product enhancement case for review and acceptance. The Enhancement Case Flow chart depicts the flow of the case movement.

Before submitting a case, a review of the Knowledgebase and related request should be done to determine if another course of action is warranted:

- An available release with the enhancement is already available
  - The release should be applied and case closed
- A known product enhancement has already been reported
  - The original case number should be added to the Parent Case field before submitting
- The issue is not an enhancement request
  - The information to resolve the issue is shared with the customer and the case is closed

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The following steps are required to submit a case for review as a potential product enhancement with specifics by department that is submitting the case.

Throughout the flow of the case automated messaging will be generated as the case owner and status changes. For this process to work effectively, please be aware of the following requirements and details and properly populate all fields as noted:

- Two groups of email will be sent:
  - To Contact and any CC email addresses identified in the case
    - The email will be logged to the case
  - To the Case Owner and Secondary Case Owner
    - These emails will NOT be logged to the case

Important Note: The Case Owner and Secondary Case Owner fields must be populated for the emails above to b e sent.

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For product enhancements that arise during the implementation of a customer's project, the following steps should be taken to submit a case to Product Management to review:

1. Create a case for the customer following standard case process Requesting Help During Delivery of an Assigned Task:
2. Clearly define the enhancement the customer is looking for and customer contact information is correct
3. Confirm the Product field is populated
4. Confirm Related Project field is populated with link to the related project
5. Confirm Category field is set to one of the following:
    1. New Feature request - something we don't currently have
    2. Existing Feature Enhancement - want change to the existing feature
    3. Feature Parity - something in legacy product but not in new replacement product
6. Parent Case field is populated with the original case requesting the enhancement if case is not the first to request it
7. Click the Transfer button
    1. Transfer To field - select Product Management Queue
    2. Enter any additional relevant details for the transfer in the Transfer Details box
    3. Click Save

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For product enhancements that arise during the sales cycle, the following steps should be taken to submit a case to Product Management to review for possible product bug:

To assign to Product Management, after creating the case:

1. Create a case using standard case creation steps for sales
2. Clearly define the enhancement the customer is looking for and customer contact information is correct
3. Confirm the Product field is populated
4. Confirm Related Opportunity field is populated with link to the related opportunity
5. Confirm Category field is set to one of the following:
    1. New Feature request - something we don't currently have

2. Existing Feature Enhancement - want change to the existing feature
3.

   Feature Parity - something in legacy product but not in new replacement product

6. Parent Case field is populated with the original case requesting the enhancement if case is not the first to request it
7. Click the Transfer button
   1. Transfer To field - select Product Management
   2. Enter any additional relevant details for the transfer in the Transfer Details box
   3. Click Save

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For enhancement requests that arise during the troubleshooting of a customer's support case the following steps should be taken to submit an enhancement request to Product Management:

1. Clearly define the enhancement the customer is looking for and customer contact information is correct
2. Confirm the Product field is populated
3. Confirm Category field is set to one of the following:

   1. New Feature request - something we don't currently have
   2. Existing Feature Enhancement - want change to the existing feature
   3.

      Feature Parity - something in legacy product but not in new replacement product

4. Parent Case field is populated with the original case requesting the enhancement if case is not the first to request it
5. Click the Transfer button
   1. Transfer To field - select Product Management
   2. Enter any additional relevant details for the transfer in the Transfer Details box
   3. Click Save

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