

General Processes

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Duplicate Opps

1. Rename all duplicate opps as "Duplicate" and mark as "closed lost"
2. Any opps with a date of 2023 should stay open.

Who to contact for all the things!

[Click this link to go to original article](#)
[with this information](#)

New CS Employee Onboarding

The information needed for new employees to fully set up with the various software we use

Chili Piper Set Up

[Click this link to find who to contact to get your Chili Piper account set up](#)

[View this video from Chili Piper on setting up the basics](#)

Be sure that the following integrations are set up: Salesforce, Gmail, Google Calendar, and Zoom

Be sure your schedule excludes Fridays, per our four-day work week.

LastPass Set Up

[Click this link for information on setting up and using LastPass](#)

Zoom Set Up

[Click this link for information on setting up and using Zoom](#)

Office 365 Set Up

[Click here for information
around setting up and using
Office 365](#)

Outreach Set Up

[Click this link to find who you
need to contact to get your
Outreach account set up](#)

Rubex Employee Account

[Click this link to find out who to
contact to get your Rubex
account set up](#)

Salesforce Account Set Up

[Click here to find out who you
need to contact to get your
Salesforce account set up](#)

Google/Gmail Account Set Up

[Click here to find out who you need to contact to have you Google/Gmail account set up](#)

New CS Employee Onboarding

DocuSign Account Set Up

Contact our salesforce admins via the [#salesforce_support](#) slack channel

Gong Account Set Up

[Click this link to find who to
contact to set up your Gong
account](#)

Slack Account Set Up

[Click here to find who you need to contact to set up your Slack account](#)

Totango Account Set up

Contact the Customer Success Enablement Manager for a Totango license

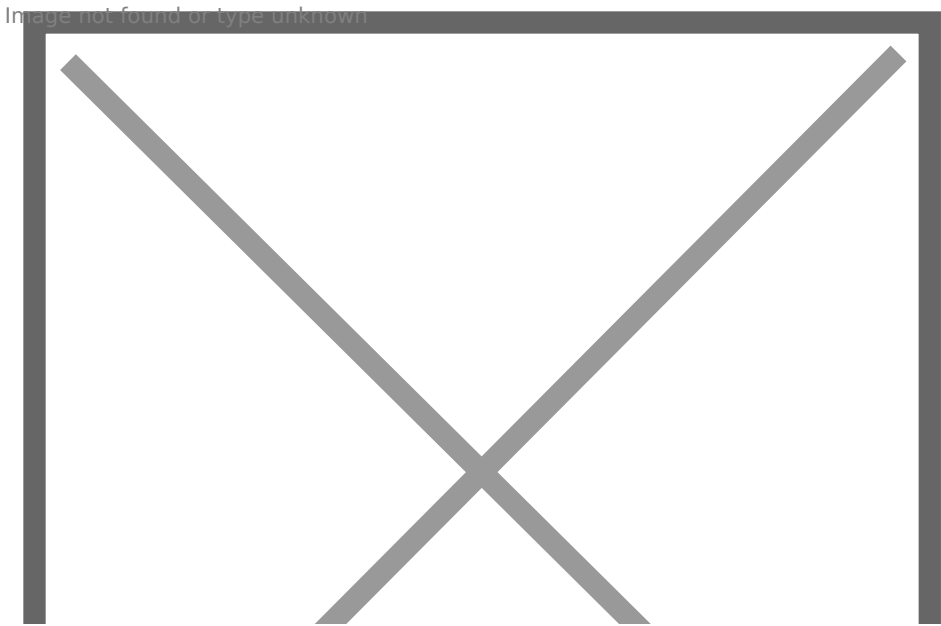
TSM Cases - Technical Support/Consultations

Use the [TSM Cases Dashboard](#) to monitor and update cases

1. A situation requires assistance from TSM
2. CSM creates Technical Support case on client SFDC account
 1. If consult by TSM is needed, include “Consulting” in the “Problem Type” selection field, and any other necessary selections
3. CSM fills out “TSM Case Workflow” form in [#tsm](#) channel in Slack
4. TSM’s will assign the owning TSM as a comment on the thread of the workflow in [#tsm](#) channel in slack
5. Owning TSM will update
 1. the case owner to themselves
 2. Status as the status changes

3. Context as the case progresses in the description, with time stamps, as needed
6. TSM and CSM will collaborate on the completion of this case

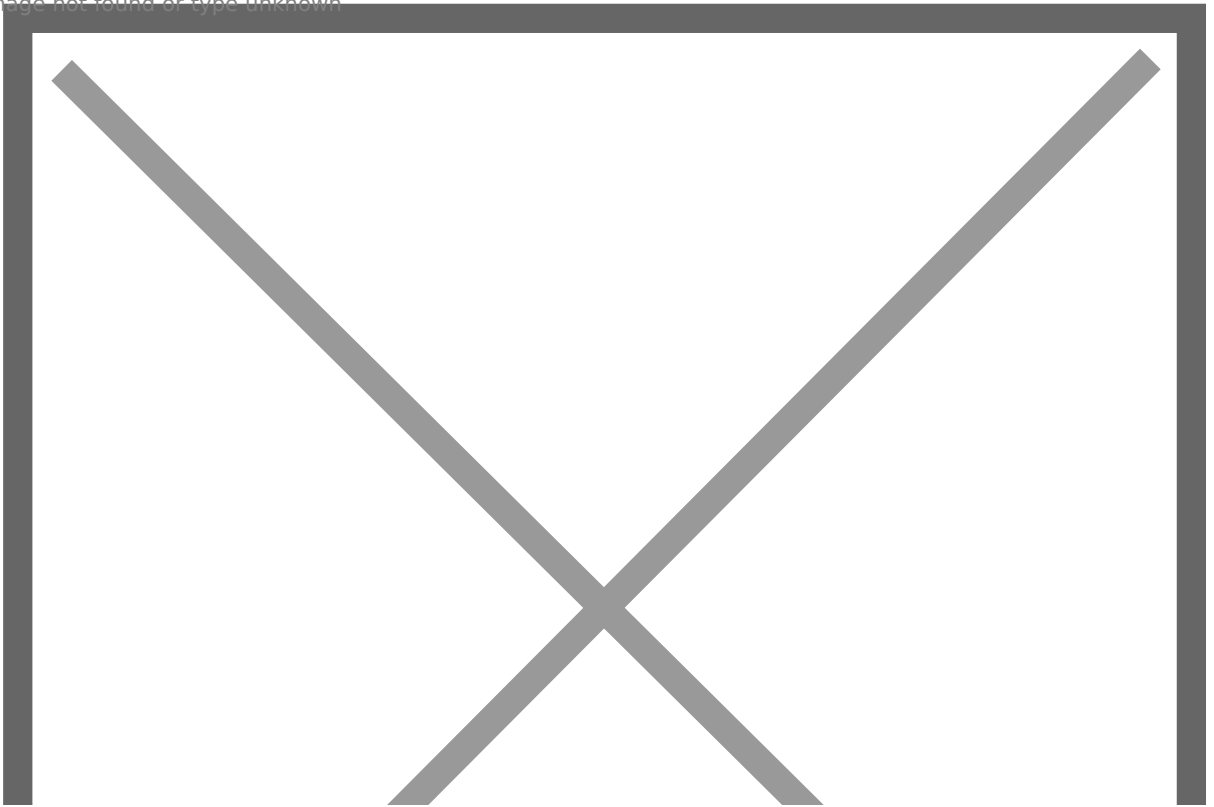
Tracking Business Reviews



- 1.
- 2.

- 1.

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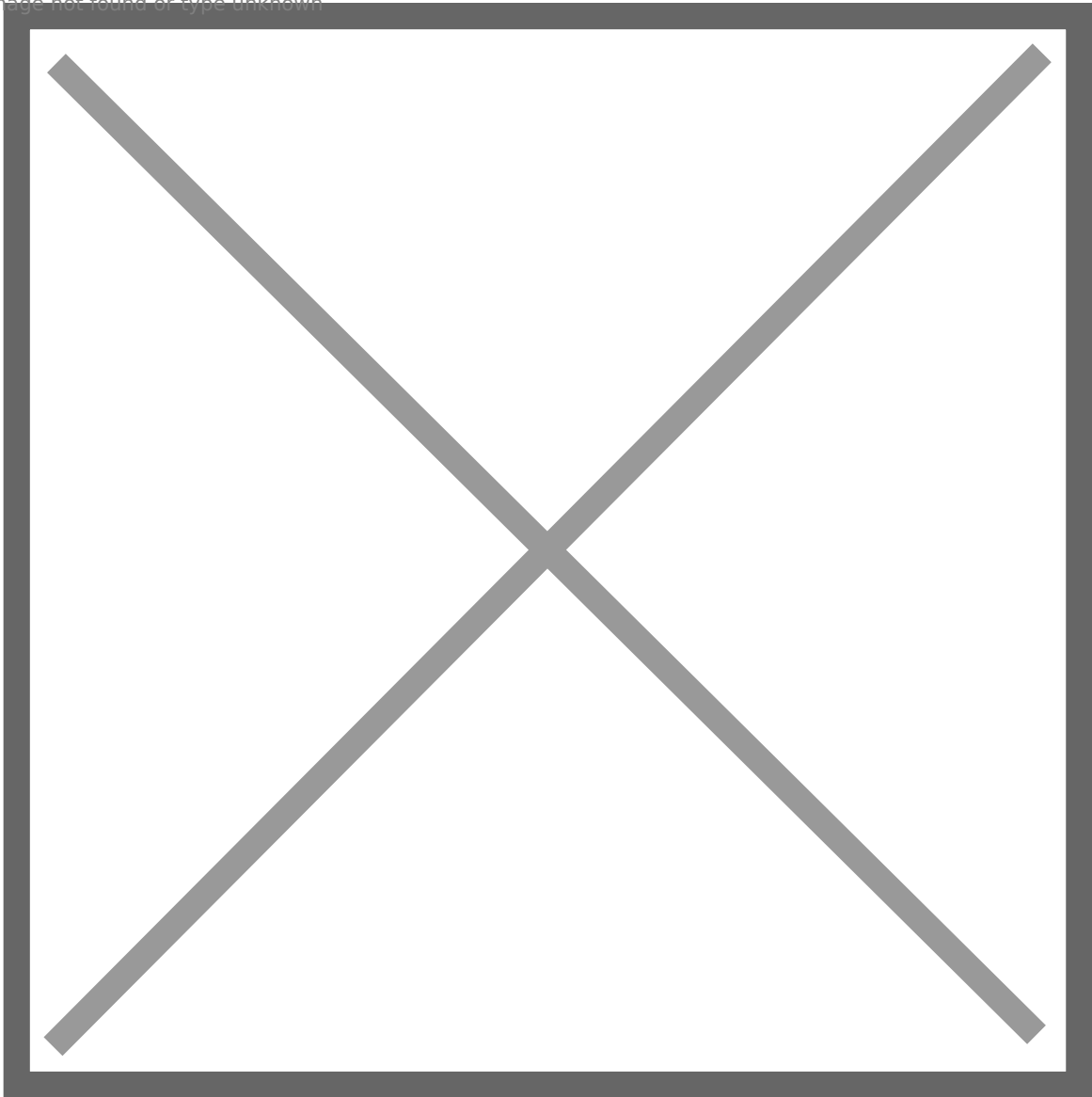


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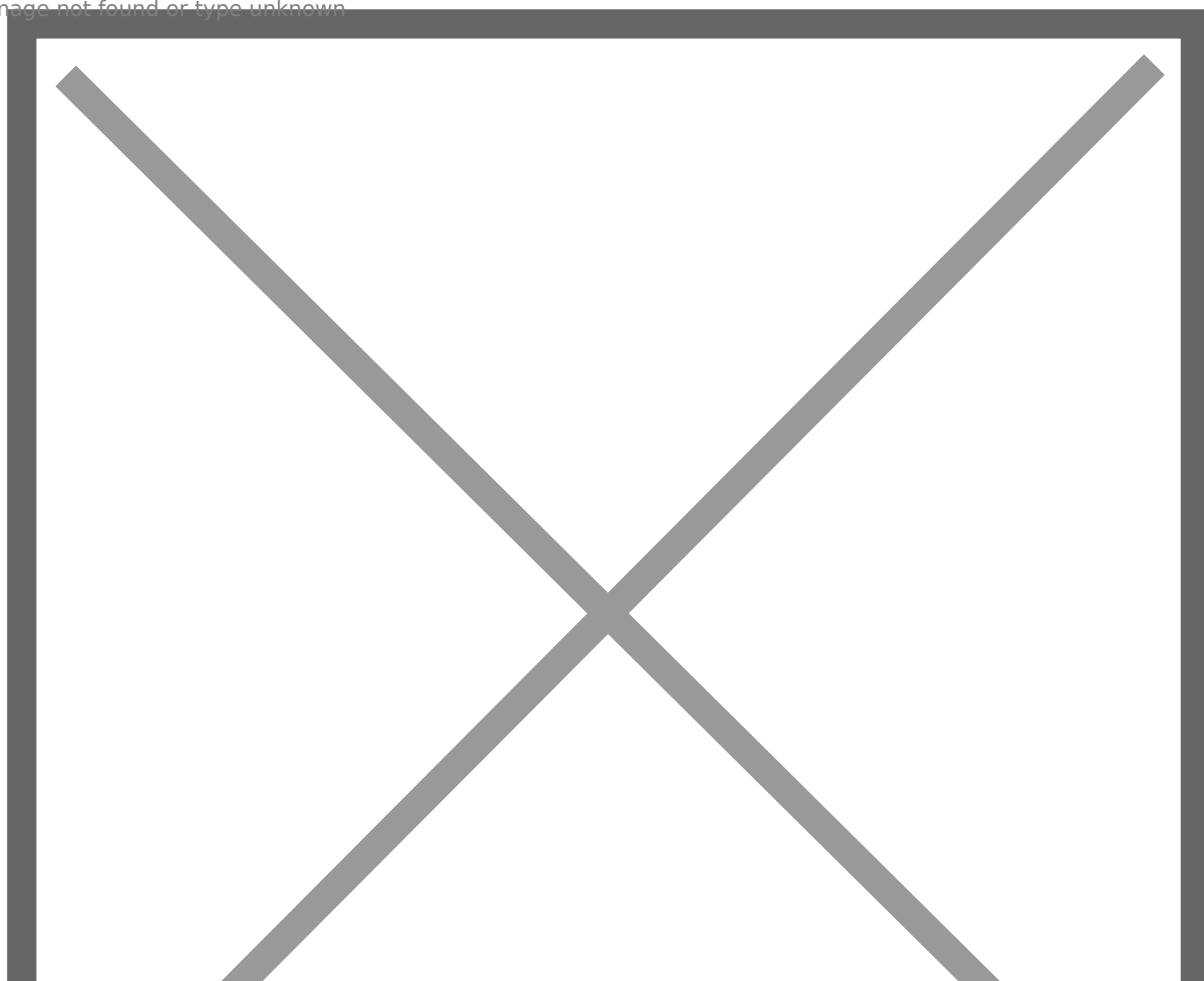
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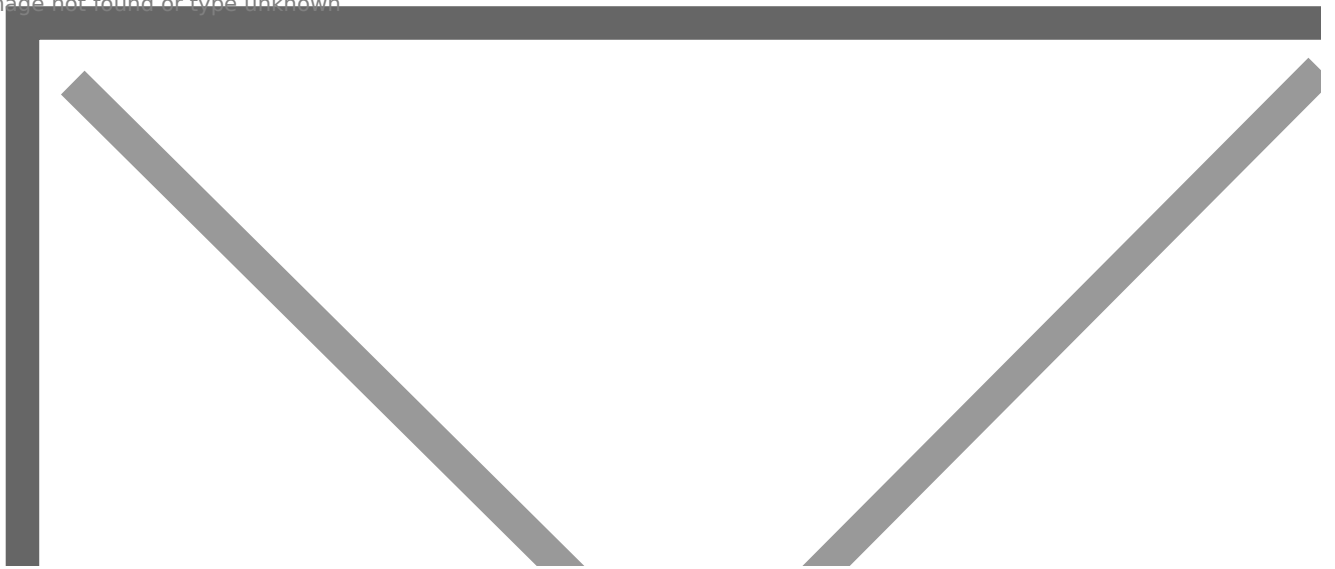
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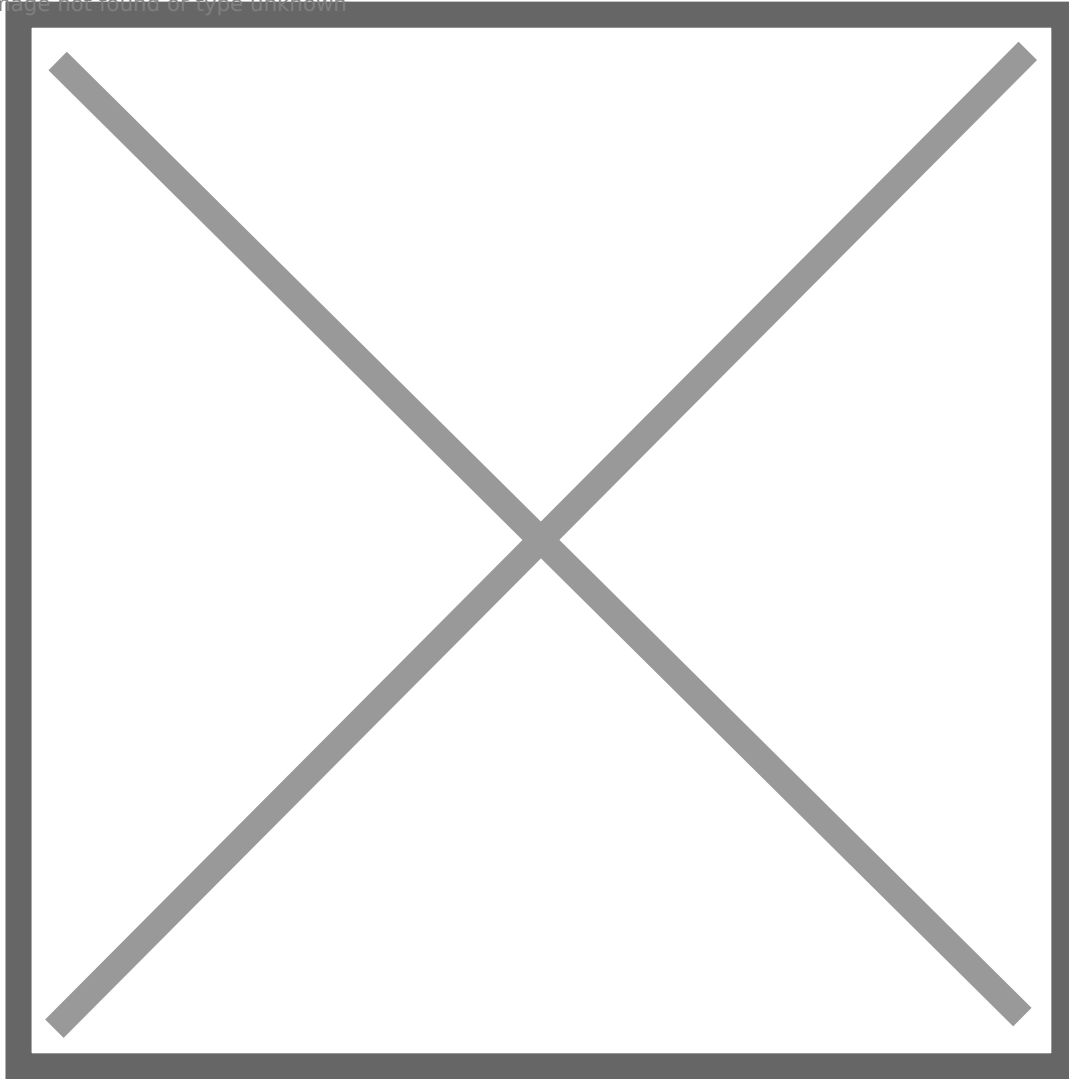
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1.

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*****Please note that the subject MUST be entered exactly as “Business Review” or the filter will not pick it up**