

Telestream Support Portal Guidebook

For Customers and Resellers

telestream

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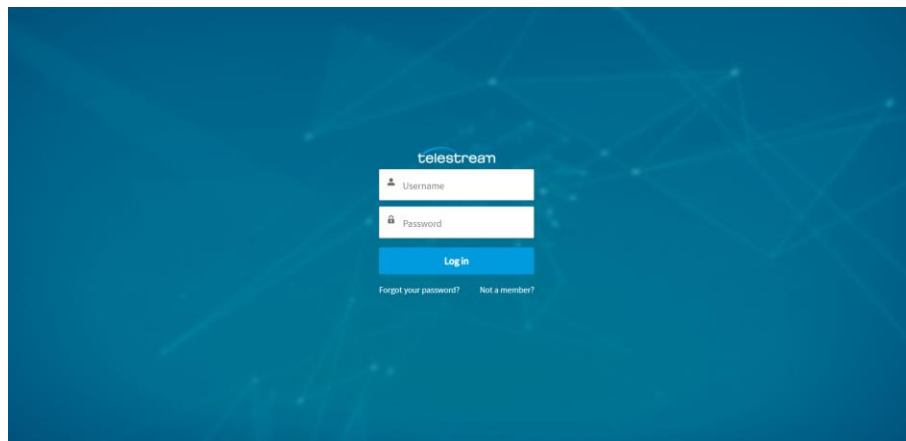
Introduction to the Telestream Support Portal

All customers and resellers of Telestream have access to the Telestream Support Portal for a consistent customer experience. Overall, using the Telestream Support Portal will provide improved case management processes, features for communication and case resolution, and efficiency and time savings.

Within the portal, customers and resellers can:

- Search for knowledge articles.
- Submit and check the status of cases.
- If applicable, see a list of customer assets.

To get started, navigate to the [Telestream Support Portal](#) landing page. The following log-in screen should appear.



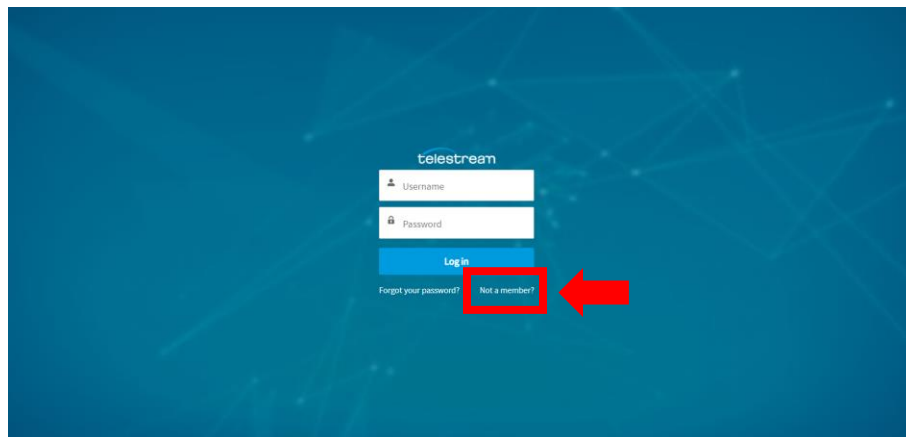
Logging In to the Telestream Support Portal

Existing Portal Users

If you already have a username and password, enter those details into the corresponding boxes and click "Log In".

New Portal Users

If you are a new user and you do not already have access to the Support Portal, select "Not a Member?".

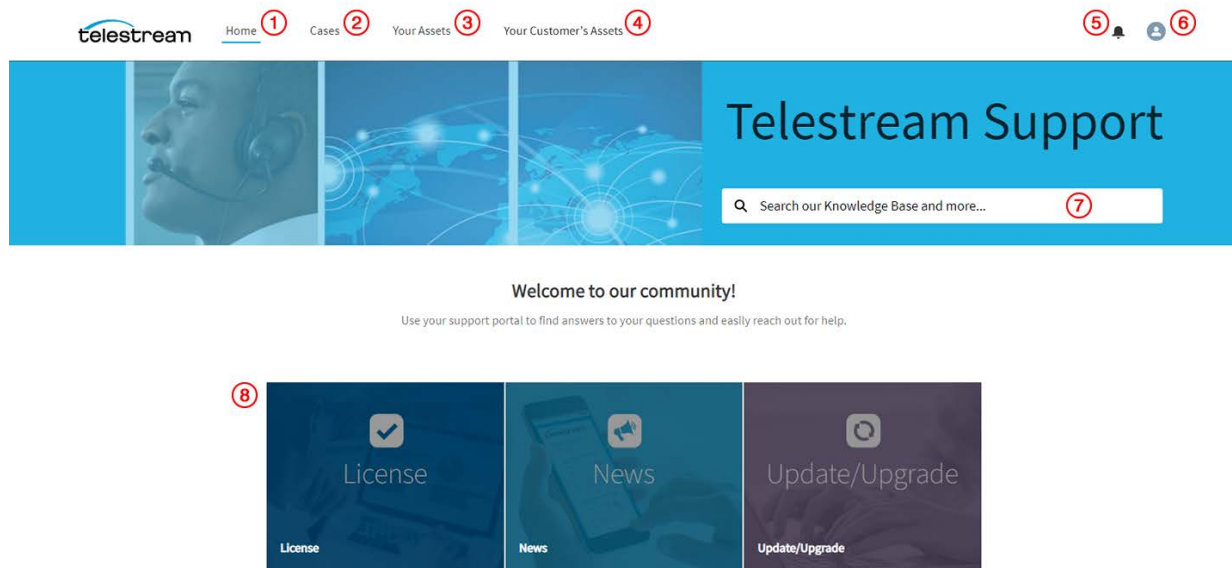


Finish signing up by completing and submitting the form that is generated to capture relevant account details and information. A Telestream Customer Care Specialist will review your access request for fulfillment.

Overview of Support Portal Features

Once you are successfully logged in, customers and resellers have the ability to submit cases, communicate with Telestream, and search for knowledge, among other features.

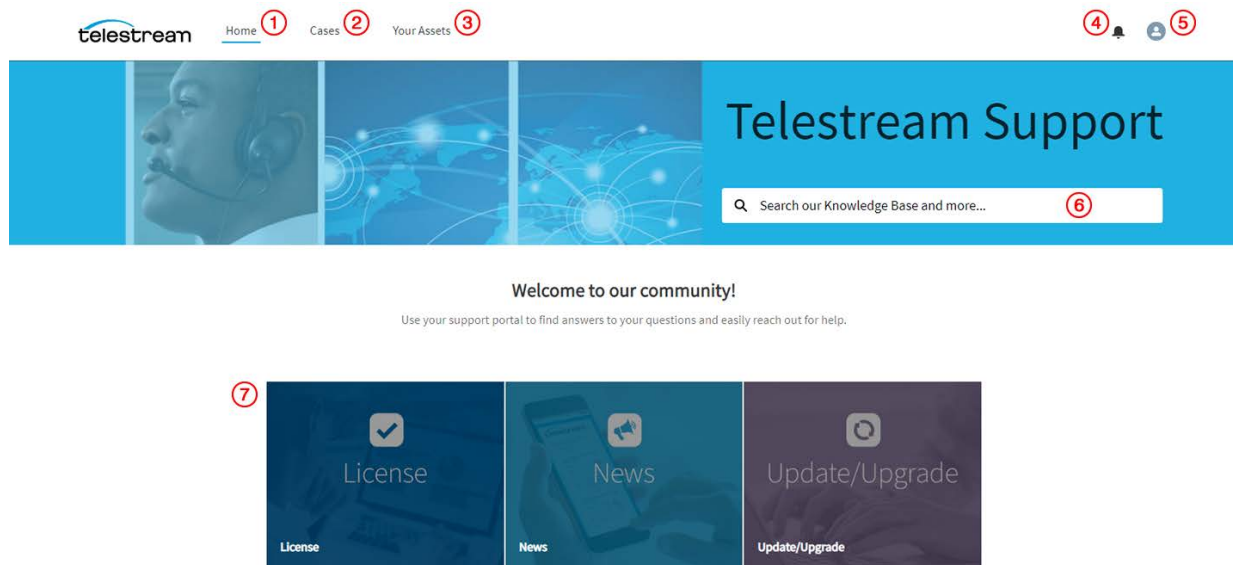
Resellers



1. Selecting **Home** will bring you back to the home page (above).
2. The **Cases** tab will take you to your list of active and closed cases (this includes any cases the reseller has open for any products the reseller owns as well as any cases for the reseller opened for customers).
3. **Your Assets** is a list of assets owned by your company, if any. Assets are often described by a License Number or Serial Number.
4. **Your Customer's Assets** is a list of the assets owned by the reseller's customers.
5. The **notification bell icon** will alert the reseller to any new notifications.
6. The **account icon** allows the reseller to access Settings and Account Information.
7. Use the search bar to search the **Knowledge Base**.
8. **Focused topics** are listed at the bottom of the page for quick access and will be updated as additional topics are identified for quick access.

For additional portal resources, such as videos and FAQs, please visit the [Telestream Product Support website](#) and choose the relevant Telestream product(s).

Customers



Selecting **Home** will bring you back to the home page (above).

1. Selecting Home will bring you back to the home page (above).
2. The **Cases** tab will take you to your list of active and closed cases.
3. **Your Assets** is a list of assets owned by your company, if any. Assets are often described by a License Number or Serial Number.
4. The **notification bell icon** will alert the customer to any new notifications.
5. The **account icon** allows the customer to access Settings and Account Information.
6. Use the search bar to search the **Knowledge Base**.
7. **Focused topics** are listed at the bottom of the page for quick access and will be updated as additional topics are identified for quick access.

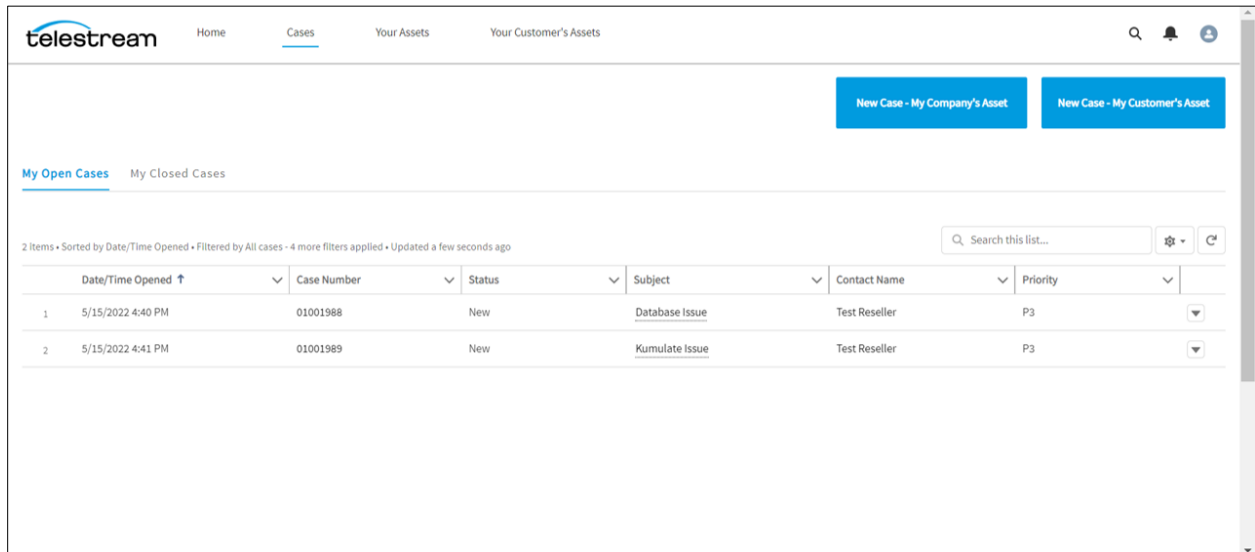
For additional portal resources, such as videos and FAQs, please visit the [Telestream Product Support website](#) and choose the relevant Telestream product(s).

Viewing a Case

All Users

All Telestream Support Portal users will navigate to the Cases tab to view cases.

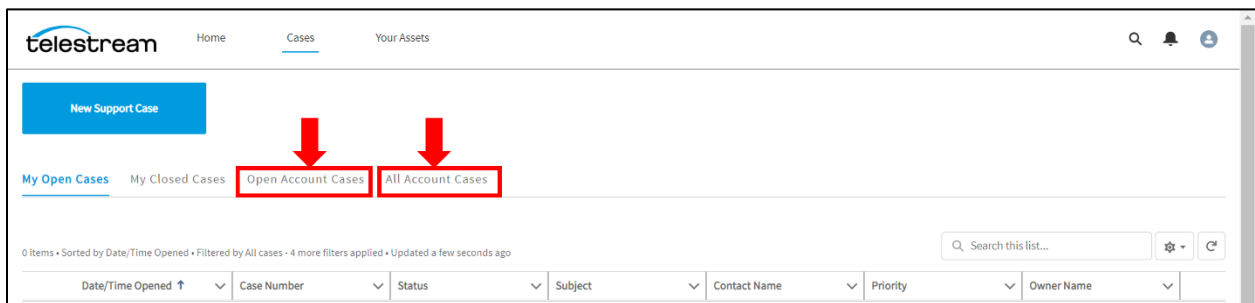
Note: Users can also submit cases via an asset. Please see the [Assets](#) Section for additional details.



From the Cases list view, users can view **both open and closed cases** and all users will have a “New Case” button at the top of the page. Only resellers have the option to submit a new case on behalf of a customer.

User Managers

While typical users (resellers and customers) can only view the cases that they opened, user managers can view all cases opened for their account and any child accounts. User Managers will see two additional subtabs within the Cases tab: “Open Account Cases” and “All Account Cases” to access the account’s, or child account’s, cases.



Submitting a Case

All Users

All users will navigate to the Cases tab to submit cases.

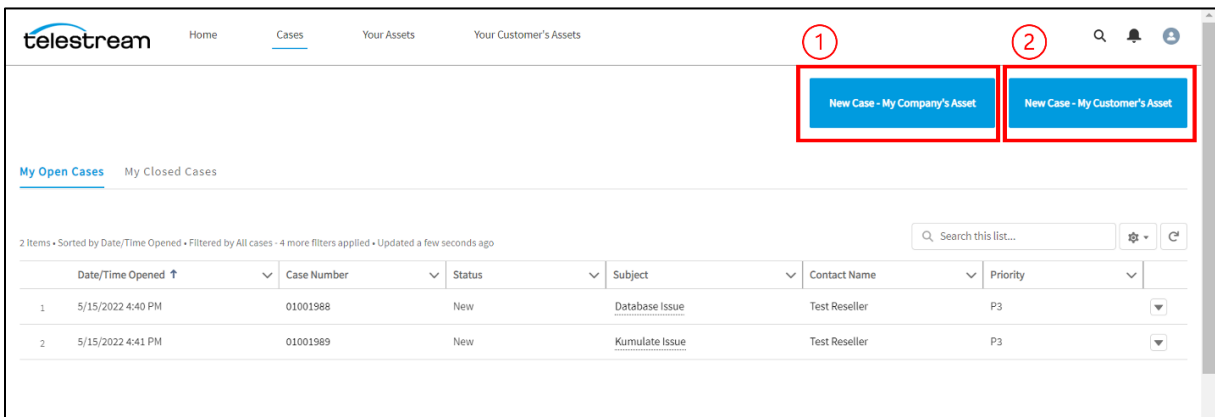


Notes about Case Creation

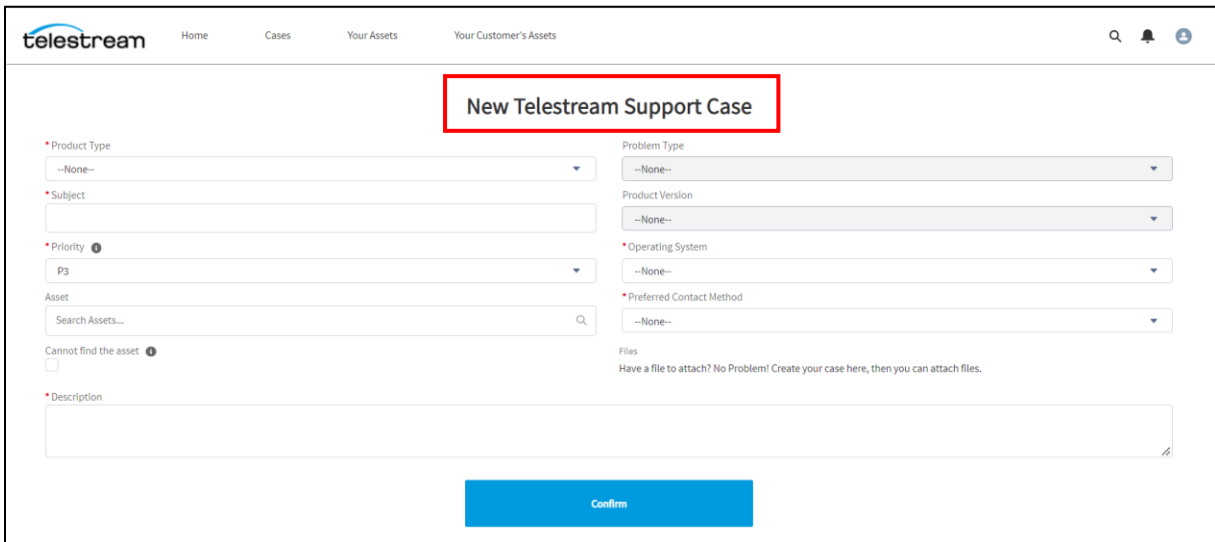
- For all users, when a case is created in the portal there will not be an email confirmation that a case was created. This is because users can check the status of their submitted cases within the portal. When a user submits a case via email-to-case, user will receive a notification that a case was created.

Resellers

Resellers have two options when it comes to submitting cases: 1) New Case – My Company’s Asset or 2) New Case – My Customer’s Asset.



- If a reseller wants to submit a case for the reseller’s company/product/account because the reseller, themselves, is a customer of Telestream, the reseller will use “New Case – My Company’s Asset”.



Ensure all required fields are completed and click "Confirm".

- If a reseller wants to submit a case for the reseller's customer, the reseller will use the "New Case – My Customer's Asset".

The screenshot shows the 'New Case - Customer asset' form in the Telestream portal. The form is titled 'New Case - Customer asset' and is highlighted with a red box. It contains several required fields marked with a red asterisk: Product Type (dropdown menu with '--None--'), Subject (text input), Priority (dropdown menu with 'P3'), Asset Role (text input with a search icon), Problem Type (dropdown menu with '--None--'), Product Version (dropdown menu with '--None--'), Operating System (dropdown menu with '--None--'), and Preferred Contact Method (dropdown menu with '--None--'). There is also a checkbox for 'Cannot find my customer's asset' and a 'Description' text area. A 'Files' section with a plus icon and the text 'Have a file to attach? No Problem! Create your case here, then you can attach files.' is located on the right. A blue 'Confirm' button is at the bottom center.

Notes about Assets (Licenses)

- If you know the asset, it is always helpful to include it on the submission form, even though it's not a required field. By including it, it could help expedite support response.
- Additional details about Assets are included in the [Assets](#) Section below.

Customers

Customers submit cases via the "New Support Case" button.

The screenshot shows the 'Cases' page in the Telestream portal. The 'New Support Case' button is highlighted with a red box. Below the button, there are tabs for 'My Open Cases', 'My Closed Cases', 'Open Account Cases', and 'All Account Cases'. A search bar with the text 'Search this list...' and a settings icon is present. Below the search bar is a table with columns: Date/Time Opened (with an upward arrow), Case Number, Status, Subject, Contact Name, Priority, and Owner Name. The table is currently empty, and the text 'No items to display.' is shown at the bottom.

Ensure all required fields are completed and click "Confirm".

The screenshot shows the 'New Telestream Support Case' form. The form is titled 'New Telestream Support Case' and is located on the Telestream website. The form includes the following fields:

- Product Type: A dropdown menu with '--None--' selected.
- Subject: A text input field.
- Priority: A dropdown menu with 'P3' selected.
- Asset: A search box with the text 'Search Assets...' and a magnifying glass icon.
- Problem Type: A dropdown menu with '--None--' selected.
- Product Version: A dropdown menu with '--None--' selected.
- Operating System: A dropdown menu with '--None--' selected.
- Preferred Contact Method: A dropdown menu with '--None--' selected.
- Description: A large text area for entering the case details.

A blue 'Confirm' button is located at the bottom center of the form.

Notes about Assets

- If you know the asset, it is always helpful to include it on the submission form, even though it's not a required field. By including it, it could help expedite support response.
- Additional details about Assets are included in the [Assets](#) Section below.

Assets

Asset Definition

Assets are what Telestream defines as the identifying key for the product you own. Example, a Vantage domain number is an Asset, a Wirecast serial number is an Asset.

Adding an Asset When Submitting a Case

All Users

All users can add an asset to the case during the new case submission process outlined above in the [Submitting a Case](#) Section. In general, there is a field on the case submission form where an asset can be added to the case.

This screenshot is identical to the one above, but with a red rectangular box highlighting the 'Asset' field. The 'Asset' field is a search box with the text 'Search Assets...' and a magnifying glass icon. Below the search box is a small checkbox labeled 'Cannot find the asset'.

If you looked for your asset number and cannot find the asset, please click the "Cannot find the asset" checkbox. This helps the Support Engineer assigned to your case prepare their response.

The screenshot shows the 'New Telestream Support Case' form. The 'Cannot find the asset' checkbox is checked, and a tooltip points to it with the instruction: 'Please describe the product that you are opening this case for in the description field.' The Description field is highlighted with a red box. A 'Confirm' button is located at the bottom of the form.

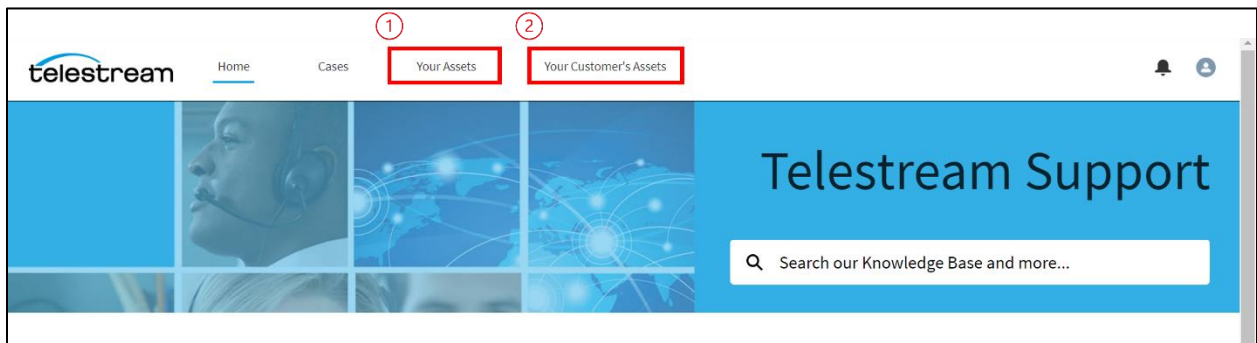
The information box encourages customers to "Please describe the product that you are opening this case for in the description field".

Creating a Case from an Asset

The asset tabs will take users to lists of active assets that are associated to that user. If the list of assets is long, use the Search box to filter the list (Example: search Vantage to see the Vantage only assets).

Resellers

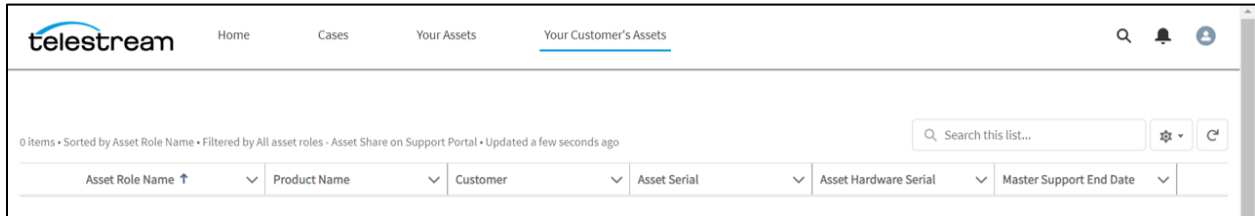
Resellers have the options to review: 1) their own assets or 2) their customer's assets.



When Resellers select "Your Assets" they will view a list of the Telestream assets that they own as customers of Telestream, themselves.

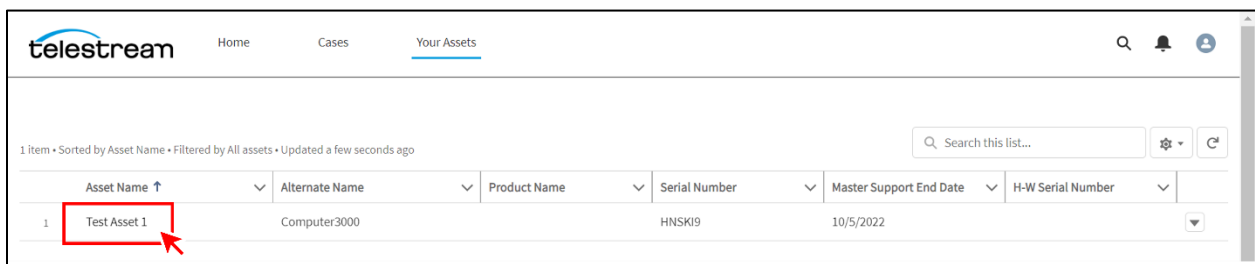
The screenshot shows the 'Your Assets' page. The page displays a table with the following columns: Asset Name, Alternate Name, Product Name, Serial Number, Master Support End Date, and H-W Serial Number. The table is currently empty, showing '0 items'. There is a search bar and a refresh button at the top right of the table area.

When Resellers select "Your Customer's Assets" they will view a list of the Telestream assets that their customers own.

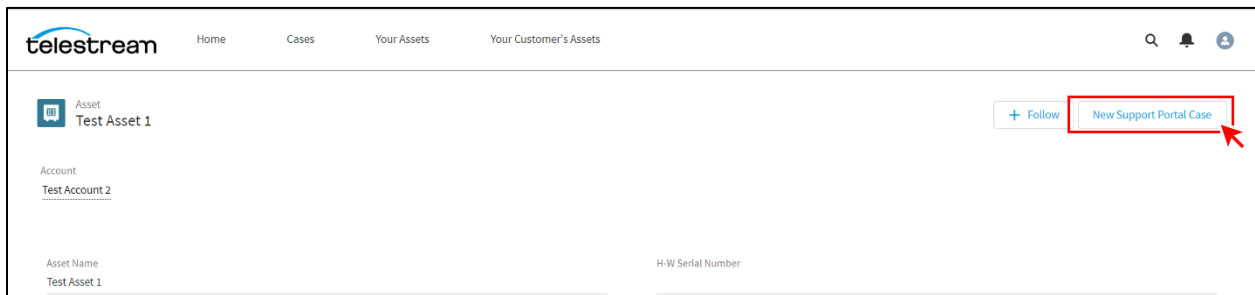


In either instance, after a reseller selects an Asset (their own or a customer's), a case can be created from that asset.

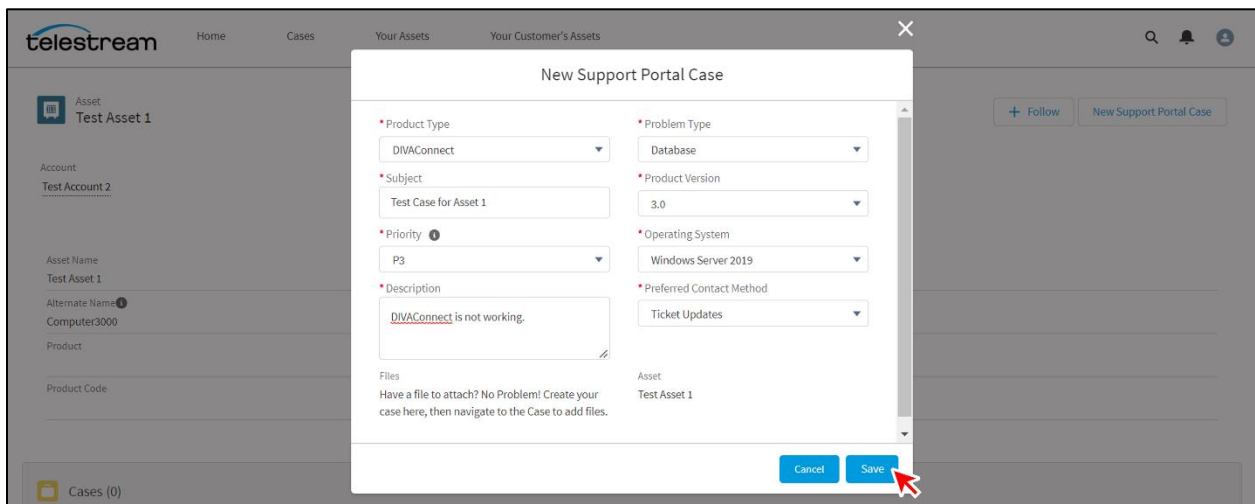
1. Choose the Asset for which you want to create a case from the list.



2. Select "New Support Portal Case".



3. Fill out the form and click "Save".



- The case has been created and will now show in the Cases list (scroll down to find this list, if needed) within the chosen Asset's detail view. The case will also show in the "Cases" tab.

The screenshot shows the 'Test Asset 1' detail page. The 'Cases (1)' section is highlighted with a red arrow pointing to a table containing one case entry. The table has columns for Case, Status, Date/Time Opened, and Subject.

Case	Status	Date/Time Opened	Subject
01005987	New	6/9/2022 7:49 AM	Test Case for Asset 1

Customers

Customers and Customer Managers have the option to view their own assets only. For general customers this includes assets for products for which they are associated. For customer managers this includes viewing all assets associated with their company's Account.

The screenshot shows the 'Telestream Support' home page. The navigation menu at the top includes 'Home', 'Cases', and 'Your Assets', with 'Your Assets' highlighted by a red box. Below the navigation is a search bar and a welcome message.

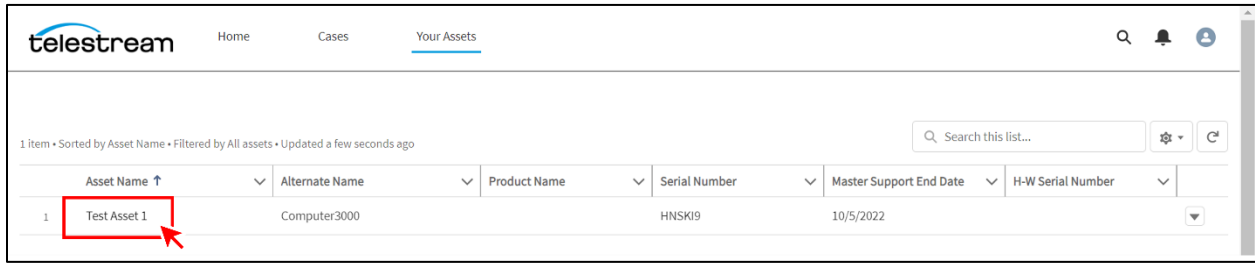
When Customers and Customer Managers select "Your Assets" they will view a list of the Telestream assets that they own as customers of Telestream.

The screenshot shows the 'Your Assets' list page. It displays a table with columns for Asset Name, Alternate Name, Product Name, Serial Number, Master Support End Date, and H-W Serial Number. The table contains one item: 'Test Asset 1' with alternate name 'Computer3000' and serial number 'HNSKJ9'.

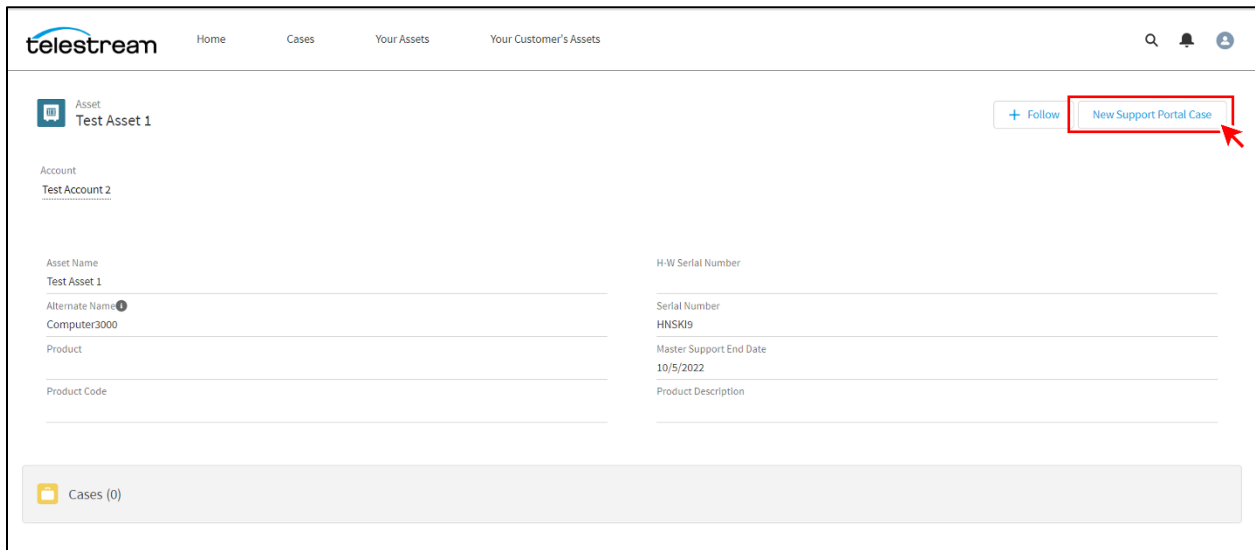
Asset Name ↑	Alternate Name	Product Name	Serial Number	Master Support End Date	H-W Serial Number
1 Test Asset 1	Computer3000		HNSKJ9	10/5/2022	

To create a case from an asset select the asset from the list for which you want to open a case.

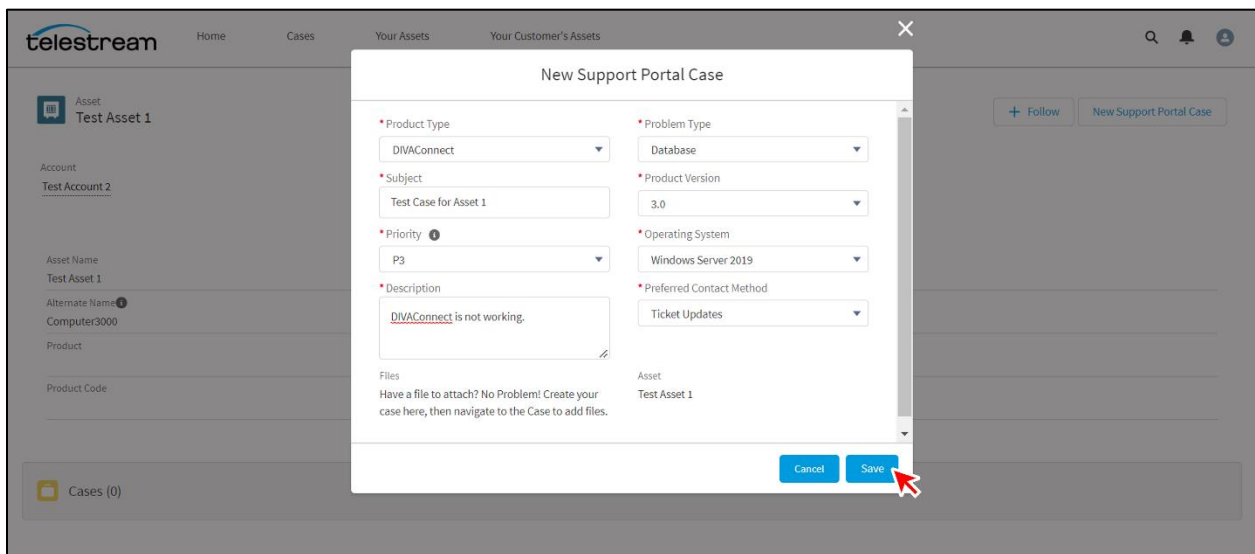
1. Choose the Asset for which you want to create a case from the list.



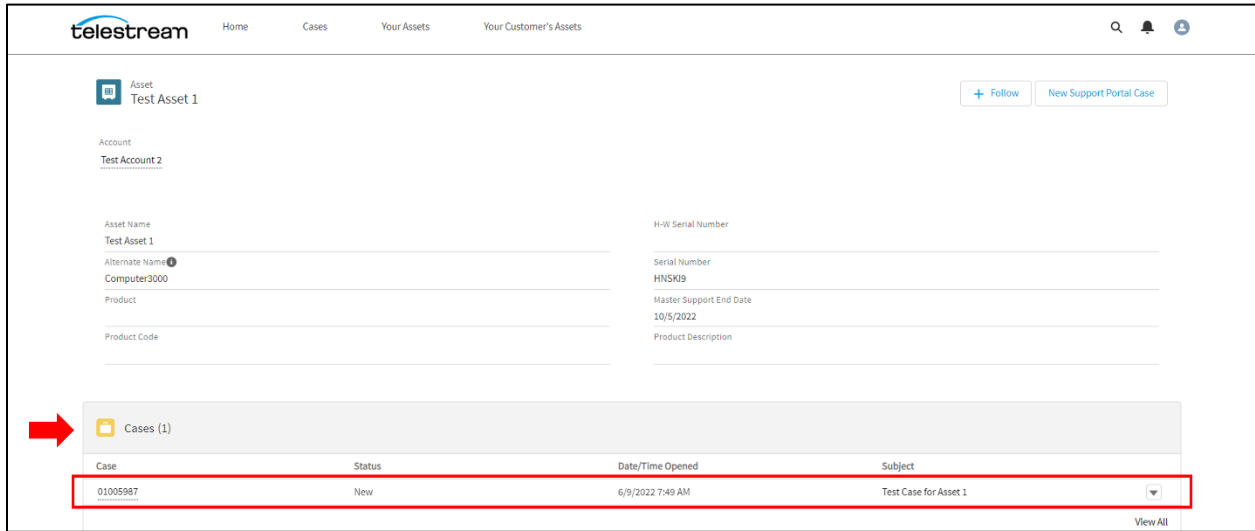
2. Select "New Support Portal Case".



3. Fill out the form and click "Save".



- The case has been created and will now show in the Cases list (scroll down to find this tab, if needed) within the chosen Asset's detail view. The case will also show in the "Cases" tab.

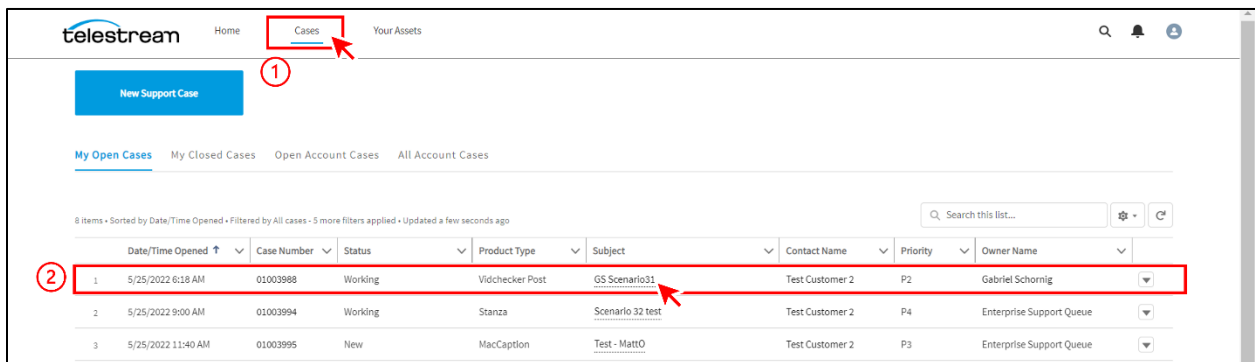


Request Priority Update or Case Closure

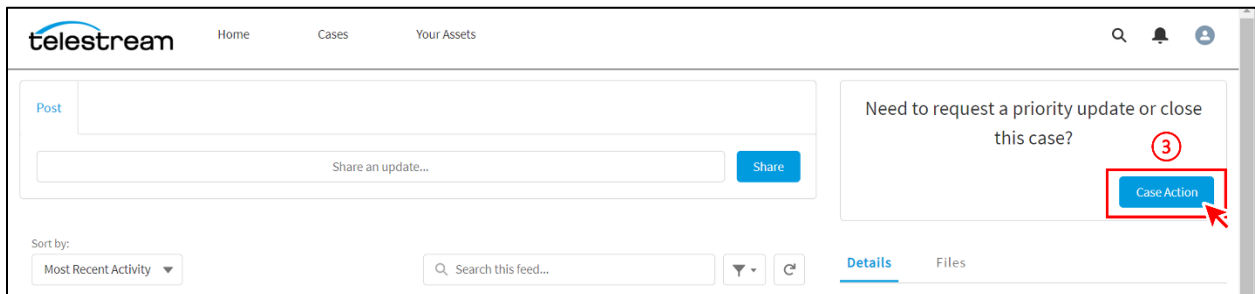
All Users

All users have the ability to request a priority update or request case closure for any case.

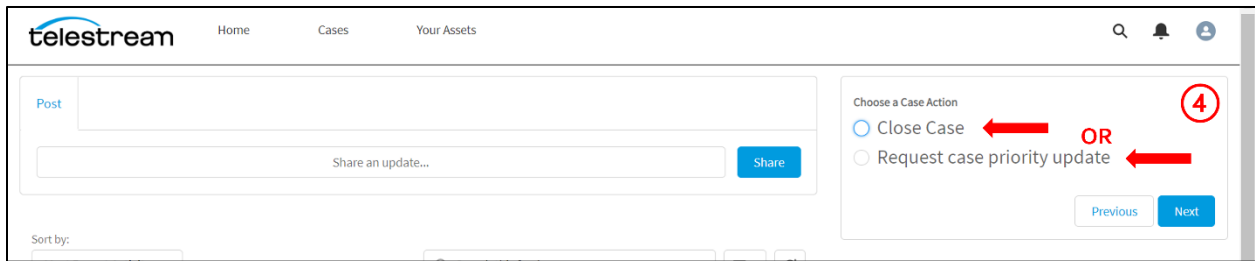
- Navigate to Cases.
- Select the case for which you would like to request a priority change or case closure.



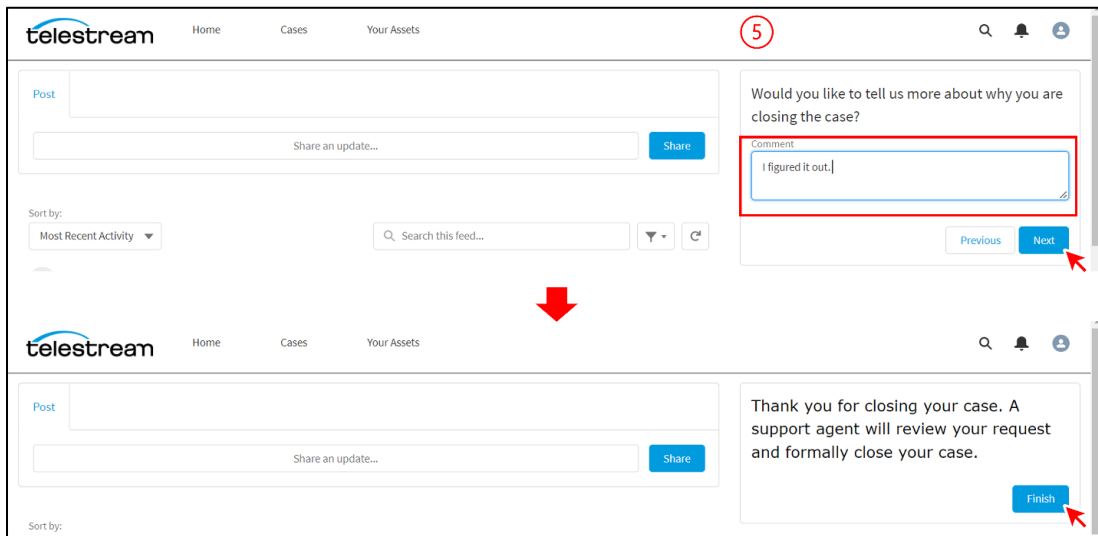
- After the case opens, select "Case Action" within the "Need to request priority update or close this case?" box.



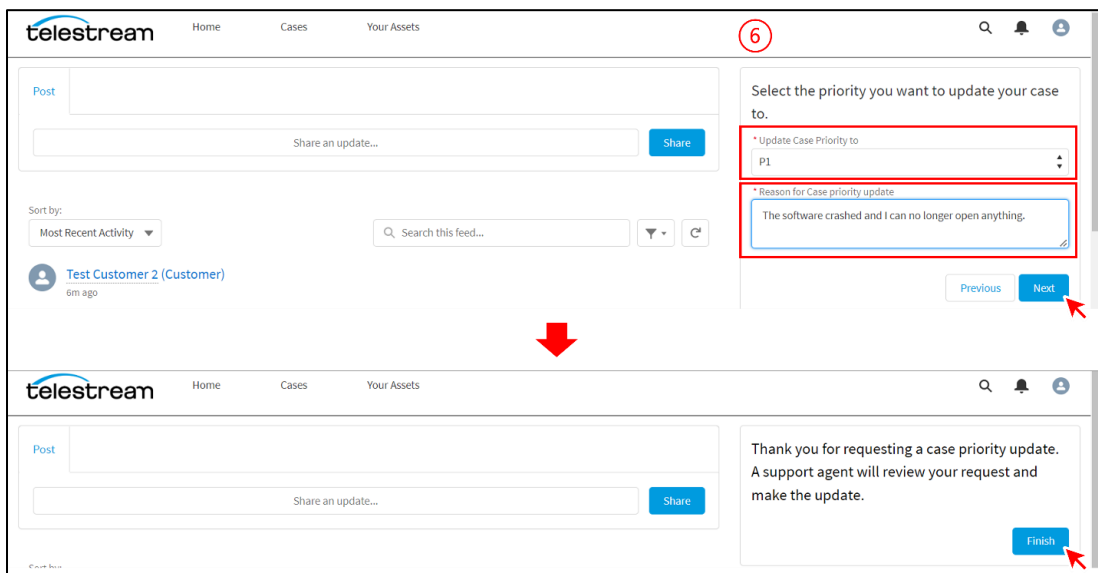
4. Depending on your desired action, select “Close Case” or “Request case priority update”.



5. Close Case: Include a comment regarding the reason you are requesting a case closure. Select “Next” and then select “Finish”.



6. Request Case Priority Update: Select the priority number you would like to request and submit a comment regarding the reason why you are making the request. Select “Next” and then select “Finish”.



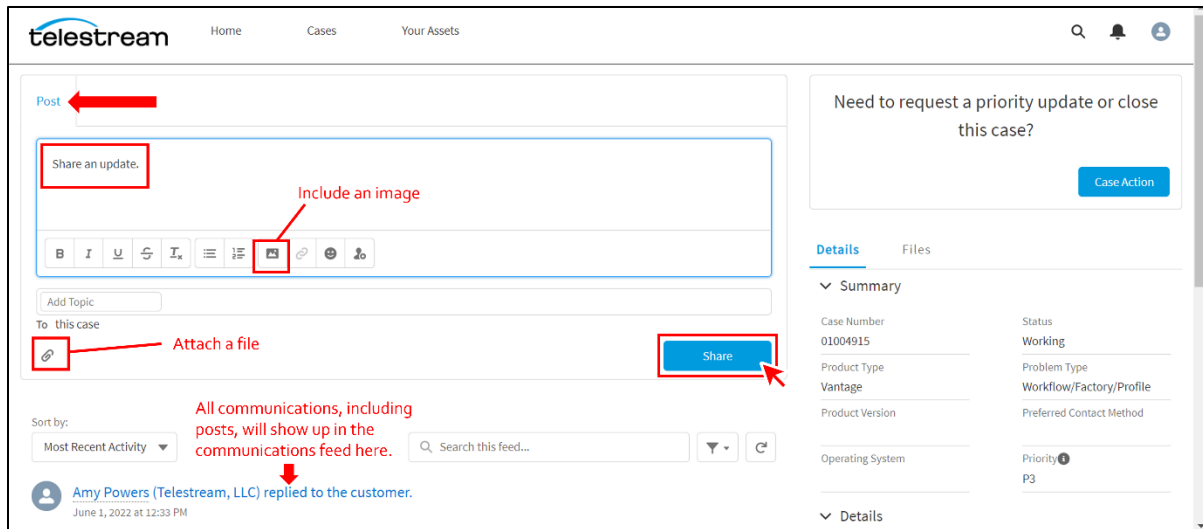
Case Communication

Posts

Within the portal, in any selected case, all users have the ability to make posts to the case. When these posts are submitted, Telestream Support Engineers receive the post and can respond accordingly. All posts, once submitted, show up within that case's communication feed.

When submitting a post, all users have the ability to attach an image or a file with that post, as well.

Make sure after you are done typing an update, including an image, or attaching a file, you click "Share", otherwise the post will not be submitted to the case.



Email Responses

All users can respond to email notifications from Salesforce when cases are being worked. When you respond to an email, that response is automatically associated with the case in question and will show up in the portal within that case's communication feed.

Attachments

All users can respond to emails with attachments or images.

Responding to Closed Cases

When a user (applies to all users) responds to a case that has been closed, a new case will be created.

Accessing Knowledge Articles

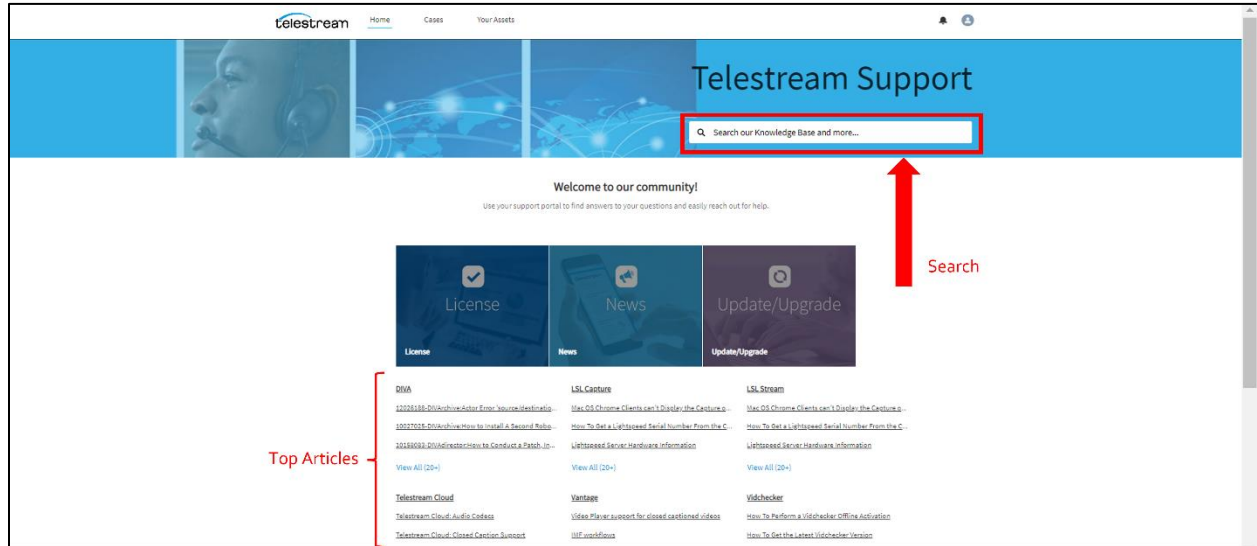
Self-service

In addition to the existing library of resources, Telestream will be publishing new and updated support articles on a regular basis. While we are happy to help for any level of support needed via a case, we encourage you to use the search functionality and seek out what knowledge is available *before* submitting a case.

Knowledge Search

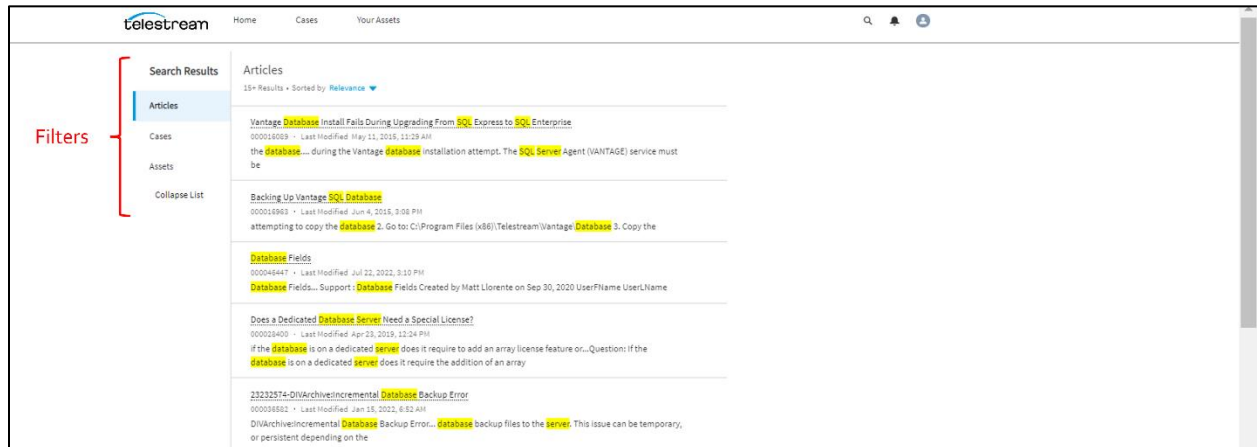
The search bar in the center of the page provides a convenient place to start when searching for knowledge and support articles. Type your search query and press Enter.

There will also be Top Articles highlighted in the Telestream Support Portal. Some product topics will be listed with some of the most relevant articles associated with those products.



Knowledge Filters

After conducting a specific search by using the search box, results will populate on a new page. In the following example, "Database" was used as the search term to generate results.



By using the filters on the search results page, you can refine your search results.