sage X3

Enterprise Customer Service

CUSTOMER SUPPORT HANDBOOK
SAGE X3

LAST UPDATE: OCTOBER 2019

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INTRODUCTION

Our Customer Service Teams are committed and passionate about the delivery of exceptional Customer services to all Customers.

This handbook has been designed to help outline our procedures so that both parties are clear about their responsibilities. We believe that this will help harness a positive and lasting relationship between us.

We hope and expect that your relationship with Sage will last many years. We believe that it is important to both of us to start the relationship in a productive manner, based on a formalized understanding of procedures and associated responsibilities.

To provide you with a quality service, we would ask that you and all staff who contact Customer Service read this document and please adhere to the procedures and guidelines contained in it.

Sage X3 Customer Service Hours of Operation	
Local Support	9:00 am to 5:00 pm CET, Monday to Friday
Sage X3 Customer Service Phone Number	+48 22 455 56 42
Email	X3@sage.com.pl
Portal Allowing the Incident Status Follow-up	ServiceWelt (account creation required)
Additional Resources	
Sage X3 Community	sagecity.na.sage.com
For invoice, licensing queries, professional services and training please contact the infoline	+48 22 455 56 57

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CUSTOMER EXPERIENCE

At Sage, our priority is to deliver a Customer experience which builds confidence and trust. Our ethos is to ensure that the services we provide demonstrate agility and efficiency that allows you to run your business seamlessly, when using our software solutions.

Sage values Customer feedback as it allows us to provide continuous improvements in our service delivery to you. Our Customers are asked to fill in periodic Customer Satisfaction surveys as we are interested in how you see your relationship with Sage.

As part of our continuous improvement strategy for our Customers, we truly value your comments. This allows us to ensure we deliver services that meet and exceed your expectations. We would like to encourage all our Customers to participate in our Customer satisfaction surveys. As a business, we are driven by what our Customers want which is why your participation is so important to us. Any feedback is appreciated, so please take the time to fill in the survey on closure of your incidents, and always feel free to drop us a line to let us know how we're doing.

SOFTWARE MAINTENANCE

CONFIRMATION OF FAULT AND PROVISION OF PROGRAM FIXES AND WORKAROUNDS

Sage operates under a Quality Management System and makes every effort to supply defect free software. However, sometimes the software does not function as designed, which affects the operation of the products.

Sage provides defect fixing where it can be demonstrated that the application is not performing in accordance with the product documentation. Full problem recreation details must be provided to the Sage X3 Customer Service by the Customer to allow them to replicate the same problem. The problem will also be tested on the latest version of the software, including the latest available patches.

As legal and fiscal requirements alter, the product may require enhancements to take account of these changes. Sage will provide these changes, as they become available. The Customer should ensure that these enhancements are installed in a timely manner.

It is Sage policy to support and maintain versions of Sage X3 on a phased basis.

Current X3 Lifecycle Policy is available HERE.

STANDARD SUPPORT

RESPONSES TO THE SOFTWARE MALFUNCTION

Sage X3 Customer Service will provide information or answer any queries on the product malfunction.

It should be noted that Customer Service Team only supports the base product and its functionality with standard support. Any customizations which cause system problems/issues are outside the scope of standard support.

For assistance with customization issues, please contact our Professional Services team.

ACCESS TO INCIDENT MANAGEMENT

Customer Service provide access to our case database via the web incident logging system, Incident Management. Access to Incident Management is controlled by an individual's login details and the database will only allow access to incidents raised by users who have been nominated by the Customer. Please contact the Customer Service Team should any difficulties be encountered while using Incident Management.

CUSTOMER SERVICE TEAM WORKING HOURS

Customer Service Team is available from 9:00 am to 5:00 pm CET, Monday to Friday excluding statutory holidays.

CUSTOMER RESPONSIBILITIES

Sage X3 Customer Service will accept a logged incident where a Customer is having difficulty with Sage software under a support contract.

Before raising an incident with Sage X3 Customer Service, you should ensure that you have considered the points outlined below:

- When did this issue start occurring – does this coincide with any other system changes?
- Are there any errors in the product or system logs which are associated with this issue?
- Find out the exact steps which the user takes in order to replicate the problem and send in screen shots where appropriate.
- Check if you have previously logged the problem with us, and if so whether you were given a resolution.
- Review documentation to confirm that the problem is not procedural or a misunderstanding of how the software works.
- Does the issue occur on all user's PCs?

To help you with problem solving, we have outlined some tasks that you may wish to carry out and answer before raising an incident with us:

- Does the problem occur when using specific data records or does it happen for all data records?
- Check for setup or configuration issues which may be causing the problem.
- Check for any data issues.
- Ensure that the SQL database is properly maintained with no SQL queries taking over a second.
- Does the issue go away if logged in as an admin?
- Does the issue go away if you log in to the application from the server?

IMPORTANT NOTES

When contacting Sage X3 Customer Service Team, it would be useful to know if the Customer is particularly sensitive or if the problem is impacting on a bigger project. This will allow us to consider the wider business impact.

If you wish to log an incident with a high priority, please provide information regarding the business impact to improve our understanding of the urgency of the issue. We would recommend that you also phone Sage X3 Customer Service to bring this incident to our attention. Please make sure that only one issue is raised per incident to avoid confusion.

SAGE X3 CONTACTING CUSTOMER SERVICES

Please provide all the information required to investigate the issue at the point of raising the incident, as this has been proven to reduce the turn-around time. We would therefore request that all mandatory fields on the standard template are completed.

Once the incident is raised, you will be given a unique incident reference. There are two ways of receiving support: you can either wait for a Customer Service consultant to phone you back to discuss the problem, or alternatively you can contact us and speak to the Sage X3 Customer Service Team by quoting our reference number.

When raising an incident via e-mail, you will need to know the following mandatory information:

- Your company name and your contact name
- The area of the product being used, e.g. reporting, user admin
- The product version being used
- The severity level you wish to assign to the incident
- A description of the problem
- Business impact
- Full recreation and testing details, including information gained before logging the issue (see Customer Responsibilities).

SUPPORT COVERAGE

Category	Covered by Sage	NOT covered by Sage	Recommended resources
Installation and updates	• Explaining all steps within the installation or update process • Diagnostics of the problem/doubts encountered during the installation or update process	• Step-by-step support during the installation or update process • Installation services – on-premise or remotely (using Terminal Services, WebEx, etc.) • Consultation services regarding the installation or troubleshooting related to the non-Sage products in your technical environment	• Authorized Sage partner • Sage specialized services • Your IT personnel • Sage City Forum • Sage University(Sage U) regarding the learning in real-time or at your own pace

Category	Covered by Sage	NOT covered by Sage	Recommended resources
Setup / Configuration **Data migration / Conversion**	• Explaining the purpose of specific fields and codes and how they are used • Guidelines regarding the troubleshooting • Diagnostics of the problems encountered during the Sage product setup, configuration and data conversion • Guidelines regarding the Sage product use at your company	• Consultation services, e.g. in-depth analysis of your company's needs and appropriate parameter setup • Step-by-step data migration from the previous software version or from the other software (also see: "Import / export" section) • Third-party application configuration • Customization creation or diagnostics (e.g. scripts, HTML, SQL, UDF and UDT triggers, etc.) • Training	• Authorized Sage partner • Sage specialized services • Your IT personnel • Sage City Forum • Sage University(Sage U) regarding the learning in real-time or at your own pace
Category	**Covered by Sage**	**NOT covered by Sage**	**Recommended resources**
Data entry **Using the product**	• Guidelines regarding the troubleshooting caused by the incorrect data entry via Sage product interface • Explaining the fields or processes that may appear unclear • Diagnostics of the issues encountered when entering data or using the product • Diagnostics related to the Sage product errors and messages	• Analysis of your personal transactions in order to establish the error when entering the data • Guidelines regarding the personal transaction encoding • Account reconciliation • Training • Support during the data entry or manipulations outside of the Sage user interface	• Authorized Sage partner • Sage specialized services • Your IT personnel • Sage City Forum • Sage University(Sage U) regarding the learning in real-time or at your own pace • Authorized data recovery centers • Your accountant
Category	**Covered by Sage**	**NOT covered by Sage**	**Recommended resources**

Category	Covered by Sage	NOT covered by Sage	Recommended resources
Import / export	• Guidelines regarding the correct data import format to your Sage product • Diagnostics of the problems and issues encountered when data import or export • Example of a standard import/export format	• Exporting specific data from a third-party software or data validation/formatting in order to import it to your Sage product • Creating your definition files or mapping in order to import the data • Data import to a third-party product • Questions regarding the use of a third-party product use and configuration • Training	• Authorized Sage partner • Sage specialized services • Your IT personnel • Sage City Forum • Sage University(Sage U) regarding the learning in real-time or at your own pace • Your accountant • Third-party software provider
Reports and forms	• Explaining different reporting options • Diagnostics of problems encountered when report setup or execution • Advising on creation/customization/specification of the basic report format so that it fulfills your needs • Advising on the basic issues encountered in the reporting tools provided by Sage	• Creating or designing your reports • Diagnostics of the issues with non-standard reports or third-party reporting software or tools (formatting formats, parameters etc.) • Support regarding the link between your Sage data in order to use them in the third-party reporting tools • Training on the third-party products • Training	• Authorized Sage partner • Sage specialized services • Your IT personnel • Sage City Forum • Sage University(Sage U) regarding the learning in real-time or at your own pace • Third-party software provider

INCIDENT SEVERITY LEVELS

Severity levels help us understand the impact on the Customer. Although initially assigned by the Customer, Sage reserves the right to determine the final severity. If you are assigning a higher severity level to the problem due to other factors at your site, then please

make this clear along with your reasons when you phone the Customer Service Team. Once the immediate problem has been resolved, any outstanding issues that remain will have their priority re-classified and down-graded as appropriate.

BUSINESS IMPACT

Please include a statement of how this issue affects your business when you contact the Customer Service Team. This will help us to better understand how you are impacted and will allow us to prioritize your incident appropriately.

- **Severity Level 1 (Critical):** Defined as impacting all users with at least one business critical process inoperable, the whole application inoperable and having a very high commercial impact.

- **Severity Level 2 (High):** Defined as impacting most users and being business critical but with short-term alternatives. One section of the application is inoperable and having a high commercial impact.

- **Severity Level 3 (Medium):** Defined as impacting a limited number of users but not business critical. Minor impact on application operability and medium commercial impact.

- **Severity Level 4 (Low):** Defined as having minimal impact on users and being cosmetic in nature with low commercial impact.

Hotfixes are delivered without full system testing. A hotfix is a request by licensee for an escalation of resolution for a confirmed Severity 1 error.

In all cases days = target elapsed business days. Working days and hours = the normal working days and hours of the Sage support center responsible for licensee's location.

The "next patch release" of the software product that a fix is targeted for is determined by the Sage cut-off date for changes for the patch release. This is usually around 30 days before the planned availability date of the release. If the cut-off date is missed, then the following planned patch would be the target delivery vehicle.

RESPONSE TIME

Stage	Severity Level 1	Severity Level 2	Severity Level 3	Severity Level 4
Initial response	Phone: 2 hours	1 day	1.5 days	2 days
First failure capture and system restoration For production system failure or other critical errors, work commencement for restoring system execution.	Work to restore failed system will begin immediately	N/A	N/A	N/A
Working towards resolution Verification, recreation and Isolation of error. Determination of initial remediation and plan for final resolution.	Efforts to resolve the incident will begin immediately after successful restoration of the system	Efforts to resolve the incident will begin within 1 day	Efforts to resolve the incident will begin within 2 days	Efforts to resolve the incident will begin within 3 days
Progress updates The minimum frequency of interaction between Sage Customer Service and licensee while working towards resolution.	Daily or other mutually agreed interval	Mutually agreed interval	As required	As required
Target for software fix delivery The target for delivery of a software fix if the agreed resolution determines a fix is required.	Agreed timeframe	Next quarterly patch or mutually agreed timeframe	Next or future release	Future release
Remedies Possible remedies may include an avoidance procedure, a workaround in the use of the software, an existing software fix pack, use of configuration parameters, reversion to previous versions of software, a hot fix or any other means provided by Sage Customer Service to continue operation of the software.	Workaround or next quarterly patch release of the product Where the impact of the issue is working critical a hotfix may be requested	Workaround or next quarterly patch release of the product	Next or future release	Future release

INCIDENT CLOSURE

An incident will be closed for the following reasons:

- Sage X3 Customer Service is notified that the problem has been resolved.
- Several update requests required for the analysis and the problem solution have been sent by us to you and no response has been received within 2 weeks since our request.

- A fix has been provided – the incident will be closed once the Customer has been notified that the fix is available.

REMOTE DIAGNOSTICS

If you are experiencing a problem that is best observed in real time, we offer remote diagnostic assistance at Sage's discretion. This is performed using any method Sage thinks is appropriate and in agreement with the Customer.

To enable remote diagnostics to function, you will need a PC which can connect to the internet. This process may involve:

- Using WebEx or TeamViewer
- Using the VPN server to connect to your network via username and password that you provide.

NEW RELEASES AND UPGRADING

New versions of on-premise Sage X3 are released every 12 months. Hotfixes may be provided as required. Software patching or upgrading should be attempted in a test environment and tested thoroughly before considering the installation for us in production/live environment.

SENDING YOUR DATA TO SAGE

Where Sage X3 Customer Service Team establishes that in order to resolve the issue additional data or precisions are required, you may be asked to send your data to Sage.

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DISCLAIMER

All information in this handbook is subject to periodic change and revision.

While every effort has been made to ensure that this handbook is accurate, Sage excludes all liability for errors or inaccuracies which may be contained in it.

This handbook refers to optional and/or third-party products and facilities, which may require a separate license.

This handbook may be subject to change. To ensure you have the latest version please contact the Customer Service Team, who can verify the latest version. The Customer Service Team will arrange for an update on request.

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