



Sage X3 Customer Services

Sage X3 Business Partner Handbook V1.4

Our Customer Services Teams are committed and passionate about delivering exceptional customer service. This handbook has been designed to help outline our procedures so that both parties know their responsibilities. We believe this will help harness a positive and lasting relationship.

Sage

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Introduction

This handbook is designed to help outline our procedures so that both parties know their responsibilities. We believe 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 essential for both of us to start the relationship in a productive manner, based on a formalised understanding of procedures and associated responsibilities. To provide you with a quality service, we would ask that you and all staff who contact Customer Services read this document and please adhere to the procedures and guidelines contained in this document.

Customer Services Hours of Operation

Support	9:00 am to 5:30 pm UK time, Monday to Friday
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UKI Escalation Contact

UKI Support Team Manager	Raheel Khan
	Email: Raheel.khan@sage.com

Additional Resources

Sage X3 Support Landing Page	Sage X3 Support Landing Page
Sage X3 Community	https://communityhub.sage.com/gb/sage-x3
Sage X3 Downloads	https://ukienterprisedownloads.sage.co.uk/
Sage X3 Lifecycle Policy	Link to Lifecycle Policy
Sage CS Portal	https://my.sage.co.uk/scases
Partner line	EMServices@sage.com

Standard Maintenance

Sage operates under a Quality Management System

Sage makes every effort to supply defect-free software. However, sometimes the software does not function as designed, which affects the operation of the product.

Our maintenance policy covers the current release of the software. For that reason, we recommend that the latest version of the software is installed, including any software “patches” applicable to that version. You will be advised how to obtain these updates and advice on installation as and when they become available. As legal and fiscal requirements alter, the product may require enhancements to take account of these changes. Sage will provide information on the requirements when available.

The customer should ensure that these enhancements are installed in a timely manner. Should you encounter a problem with the software, we would expect detailed replication steps to be submitted for us to report the issue as a defect formally. If your customer is not on the current release, we would expect testing to be conducted in the latest release first before contacting Customer Services. When a defect is reported and replicated by Sage, a defect reference number will be issued.

It is important to note that if an issue can only be reproduced on a particular data set, it could be a problem with that data and not a defect in the software.

Where a problem is an intermittent and immediate diagnosis is not possible, or non-defect-related issues adversely affect the software, appropriate advice, assistance, or workarounds will be provided.

Lifecycle Policy

Sage manages a Lifecycle Policy for Sage X3, which determines how the Maintenance contract is fulfilled.

The main criteria are the Sage X3 version and issue severity – these determine the version where a fix may be implemented. Other factors may be considered.

A copy of the [Sage X3 Lifecycle Policy](#) is held in the Sage knowledgebase.

Standard Support

Customer Services provide second-line support to customers through our network of Business Partners.

We will provide information or answer any queries relating to the standard software functionality via our Case Portal. To retain the integrity between you and your customer, we do not provide direct support to your customers. You would always initiate and attend any dialogue you wish your customers to be involved in with us attending.

As a second-line support team, we would not expect to provide:

- Basic troubleshooting and functionality questions
- Queries on Sage X3 which are covered within the standard documentation
- Questions on topics covered within our product training courses
- Information available through self-service options such as:
 - [Knowledgebase](#)
 - [Community Hub](#)
 - [Online Help](#)

Suppose your query relates to any of the above. In that case, we will provide guidance on the next steps, including referring you to existing support material via our website, this handbook, or preferred training courses. This information may also be recorded against the case and form part of our Case Analysis, which can be used to help develop your service desk.

It should be noted that Customer Service only supports Sage X3 and its functionality with standard support. Any customisations which cause system problems/issues are outside the scope of standard support.

Customer Services reserves the right to refuse support to any consultant who has not attended the appropriate training courses or conducts themselves in an unprofessional manner towards members of the Customer Services team.

Support Exclusions

General Support Exclusions

- Any costs incurred installing Sage X3 patches, updating or upgrading an environment
- Training and any other Services not specified in the contract with Sage
- The correction of data inconsistencies caused by incorrect Sage X3 usage.
- Versions that are no longer in the "Current", "Standard", or "Extended" phase.
- Any requests where Sage X3 is used other than in accordance with its documentation
- Data backup and related procedures
- The consequences of continuing to use Sage X3 after a defect has been identified
- Modifications to the source code of Sage X3
- Failure to comply with the system requirements
- A fault in the Customer's environment, including peripherals or network preventing standard operation of Sage X3.
- Support or services relating to specific customisations, developments, and associated configuration.

Poor System Performance

Sage Customer Services team will investigate performance issues with standard Sage X3. These must be able to be recreated in a standard Sage X3 environment outside of the customer's infrastructure.

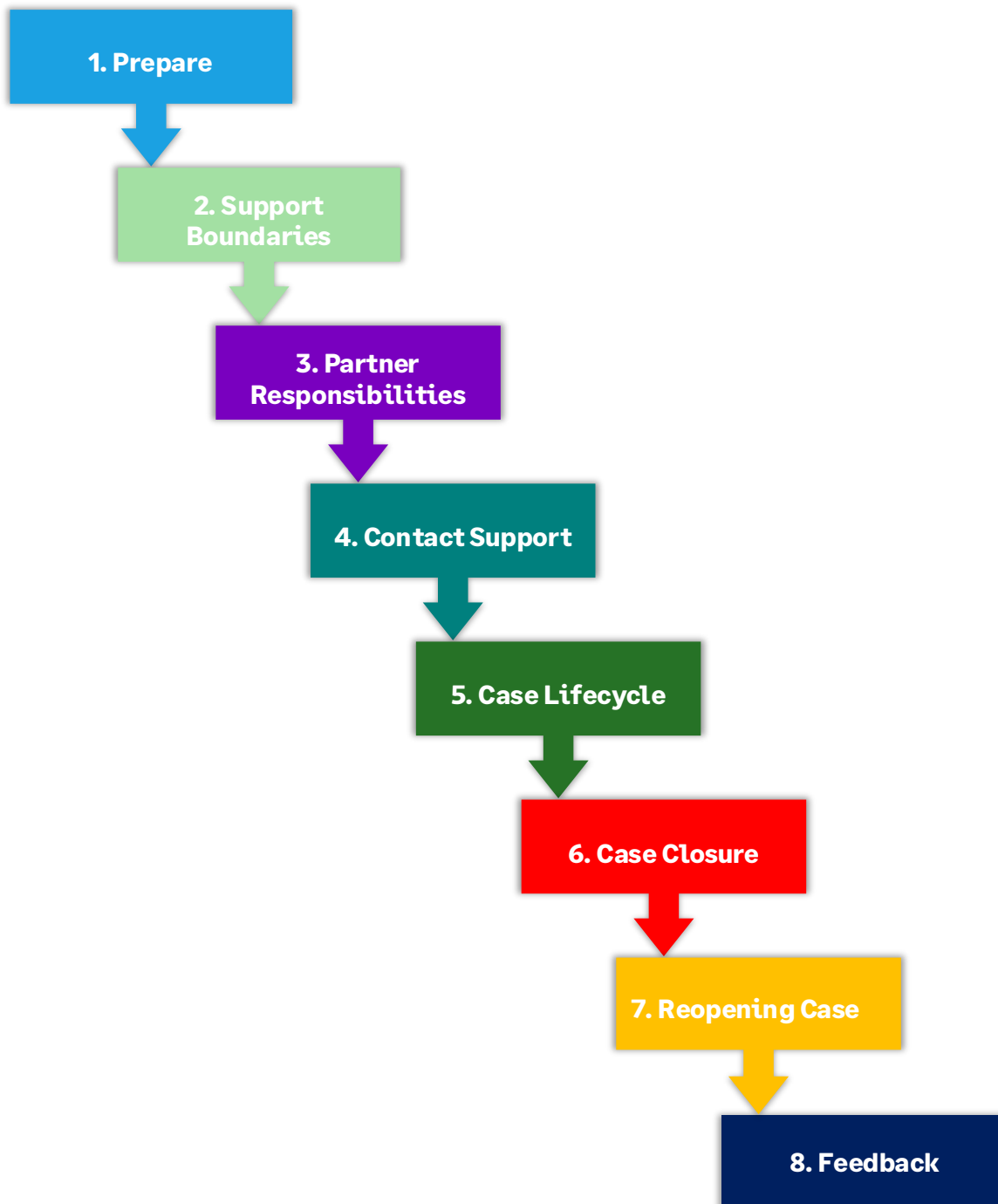
Data Corruption

Sage does not commit to correcting corrupted data. This includes data corrupted by Sage X3 defects. Risks, scope, and impact on a Customer's Sage X3 system can be tough to predict and could require detailed implementation knowledge to resolve. Support is unable to amend or correct production data.

Urgent Information

All Customer Service's related information will be published on Community Hub. Any urgent information will be sent to your named Customer Service contacts. Please contact the Customer Service Manager if you wish to add or amend any contacts.

Case Management



1. Prepare

Customer Services provide access to our Case database via the Case Portal. Access to the Case Portal is controlled by an individual's login details, and the database will only allow access to incidents raised by users who have been nominated.

The Case Portal allows new cases to be raised and existing ones to be updated. Should you need access to the portal, please contact your internal portal administrator.

2. Support Boundaries

Details of our support boundaries are available in the Standard Support section; we would ask that you familiarise yourself with these before raising a case through the portal.

3. Partner Responsibilities

Before raising a case with Customer Services, you should ensure that you have the relevant Sage X3 certification and have considered the points outlined below:

- Check if you have previously logged the problem and if a resolution has been provided.
- Check that the issue cannot be resolved using your resources or the available Sage resources, such as online help, Community Hub, etc.
- Check the problem is not caused by bespoke changes.
- Review online resources (Product Help, Community Hub, Knowledge Base, Patch finder etc.) for known issues.
- Try to recreate the issue using a standard product configuration in the latest software version.
- The product is within the lifecycle policy

4. Contacting Support

Please raise and update Cases via the [Case Portal](#).

Before raising a new case, please review the Sage X3 Support Landing Page, specifically the Perfect Case Blog. You will need to provide the following information as this has been proven to reduce the turn-around time.

4.1. Customer Name: Helps us know your customer.

4.2. Product Name, Version and Patch level: Helps us investigate relevant code levels and look for potential future fixes.

4.3a. Severity: Impacts the response times you can expect from Sage. If it is critical, then please ensure the contact on the case is available at short notice.

Severity	Definition	Business Impact	Target Response	Solution
Critical	Application or service is not available. Security or data integrity has been compromised.	Emergency	Response within two business hours with agreed updates	Service restoration, clarification of functionality, config change or Hotfix
High	A critical business process cannot be completed. There is no suitable workaround that fits the context.	High	Response within one business day with subsequent updates provided	The workaround, clarification of functionality change, Hotfix, or future release
Medium	An issue that causes an inconvenience in part of a business process to be delayed or hindered	Medium	Response within two business days with subsequent updates provided	The workaround, clarification of functionality changes or future release
Low	An issue that does not prevent a business process from being completed. This could be a cosmetic or ergonomic issue & other questions	low	Response within three business days with subsequent updates provided	The workaround, clarification of functionality changes or future release

4.3b. Business Impact: Helps us analyse the urgency of the issue. e.g., frequency, all users or just some, the pattern of a problem occurring, consistent or intermittent, and which environments were affected (LIVE/UAT/SEED).

4.4 Subproduct: To ensure this goes to the right team.

4.5 Clear Summary of the Issue: This is crucial when logging a new case. Information MUST include below details in the case summary:

- Description of the base issue supported with A Clear Test Case/ Steps to reproduce the issue with full-screen Screenshots.
- When the problem started to occur?
- Changes introduced just before the problem started.
- Is a workaround available, and what is the workaround, if known?
- Details of key customisations within the problem area.

4.6 System Architecture: Information regarding system architecture is crucial when logging a technical case.

4.7 General Pointers: As a competent Business Partner and a trained customer, you would have already investigated the issue first, so please also provide us where possible.

- Any details of the pre-work or investigation being done already.
- References already reviewed, such as previous cases, KB articles, Community Hub Alerts or Blogs and Patch finder
- Any other general thoughts/ notes / observations/ log files and screenshots.

5. Case Lifecycle

Once your case has been raised, the Customer Services team will review it in line with the severity level. Where applicable, the team will liaise with necessary third parties, be those other Sage teams or external vendors.

Case Status Codes and Status Reason: When using the Case Portal, you will see that during the lifecycle of a case, it will have a status code and status reason placed against it:

Status	Definition	Status Reason
New	New query submitted by the customer but not yet assigned	Requires Attention
Working	Troubleshooting customer issue	Researching Testing Data Remediation
Waiting	Pending Partner Response	More Info Verify Solution
Response Received	Inbound message received from Partner	Requires Attention
Escalated	Case escalated to a higher level of support, usually because the issue is more complex or requires specialised expertise	L2 Sage Network (L3) Product Engineering (L3) Manager
Awaiting Fix	Waiting for a fix that is planned for an upcoming release or pending a fix	Release Planned Pending Fix
Reopened	Previously closed case reopened by Partner or Agent due to same issue	Requires Attention
Closed	Case has been closed, either because the issue has been resolved or because the customer has not responded	Resolved Duplicate No Customer Response Feature out of Scope

Case Escalation: Where a Case does not meet your or the customer's expectation, you may escalate it. The first point of contact should be the owner of the case to progress the case as an escalation, and if you believe that this course of action is not progressing the escalation, please get in touch with the UKI Support Team Manager.

The UKI Support Team Manager will discuss the Case with you to understand the nature of the problem and its impact. We will then agree on the next steps and ownership and deadlines. The UKI Support Team Manager will escalate the Case within the Sage business as appropriate and document all correspondence regarding the escalation so we can accurately record events.

Sending your Data to Sage: Where issues are not fully identified, Sage may request a copy of the customer data via a secure and safe file-sharing application. Before any data is sent in, the data owner will need to complete a Data Acceptance form in advance.

6. Case Closure

A Case will be closed for the following reasons:

- Agreement between yourself and Customer Services that a resolution has been reached or at your request
- We are confident the answer provided will resolve the query
- A fix to the product has been planned for a future release
- The issue has been sent to the Sage COEX team
- The problem is outside the scope of Customer Services
- The customer's version of X3 is outside the lifecycle policy, and no further assistance can be provided
- For cases with a status of 'Waiting on Partner', Customer Services have not received contact from you, and we have asked for an update
- Investigation of a case identifies that the software is working as designed
- Insufficient troubleshooting/ diagnostics have been performed.

7. Re-opening a Case

A Case can be re-opened within two weeks of the closure date.

To re-open a Case, update the Case Portal stating why you feel the Case needs to be progressed further. Customer Services will then contact you to advise whether the Case will be investigated further. If the Case was closed over two weeks ago, you will be asked to open a new case and reference the old case.

8. Feedback

You will encounter two main surveys: our quarterly Global Customer Satisfaction Survey, which is interested in how our customers see their relationship with Sage; the other requests feedback on a recently closed case.

On the closure of a case, you may receive a feedback request from Sage. If so, we ask that you reply and provide your valuable feedback on the case handling. It will help us improve our customer experience in any future cases.

ISV Software

Where problems or performance are identified within certified ISV Software, the Business Partner should raise this problem directly with the ISV's Support Services during their Support hours. ISV providers are responsible for training and support for solutions and will give access to the solution Knowledgebase.

SLAs may differ from X3 core product Support.

Sage X3 Cloud

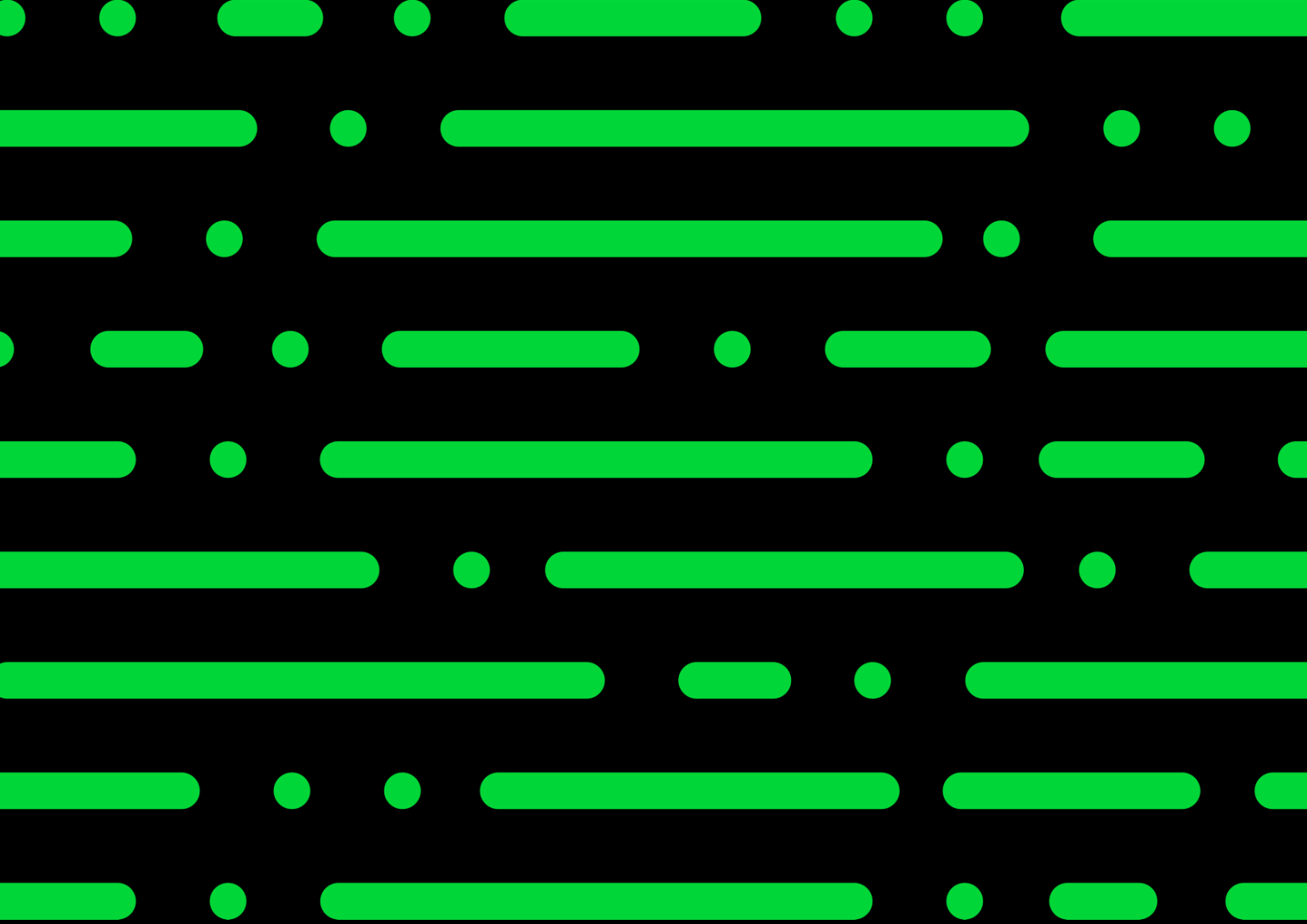
For any Partner Cloud offering, Sage support of X3 will operate using the current model for X3 on Premise, providing functional support only. Functional support issues or queries relating to the functionality of Sage X3 will be handled as per our Standard Support procedures, as detailed in this handbook. Sage does not support the underlying infrastructure. The support model described in this section applies only to Partner-hosted Sage X3 environments and not to Sage-hosted Sage X3 Cloud services.

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 third-party products and facilities, which may require a separate licence. You should consult your Sales Account Manager for further information.

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 and arrange for an update on request.



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