This topic focuses on how to prepare a customer for support, and how to use the SAP support processes to solve your customer’s problems.
On completion of this topic, you will be able to:

- Explain the partner support responsibilities
- Use the SAP search and logging tools
- Follow the required process for reproducing, researching and submitting a support message
- Describe the advantages of Remote Support Platform for supporting a customer
Partner companies are required to set up a support organization with an experienced, fully staffed support desk. Additionally, multiple test environments should be established so that customer’s problems can be replicated using the localizations and versions in use at the customer sites.

Support consultants need to know:
- The correct processes for working with SAP support
- How to use SAP’s support tools to diagnose and manage customer problems

Partner companies are required to set up a support organization with an experienced, fully staffed support desk. When setting up a support department to support your customers, you need to make sure that the support consultant follows the SAP standard support processes.

In addition to knowledge of the SAP Business One application, a support consultant needs to know how to use the tools provided by SAP to diagnose and manage customer problems.
In the first part of this topic, we will cover setting up support.
The SAP Business One Support Cycle Navigator is available on the PartnerEdge portal and provides the overall process and guidelines for a partner to establish a support department and work with SAP support.

After the customer has gone live, and when critical post go-live issues are resolved, you need to transition the customer to support mode. Follow these steps:

- Review and agree support procedures with the customer. The responsibilities for the production system may have been defined in a Service Level Agreement. In addition, you as the partner may agree to perform additional duties such as database administration, if requested by the customer.
- Install and activate Remote Support Platform (RSP) to monitor and maintain the system status. Run the System Status Report which gets transmitted to SAP support. Remote Support Platform is covered later in this topic.
- Hand over the customer to your own (partner) support department. Provide your support hotline number and support hours to the customer.
- Provide an S-User number to the customer. Make sure the customer can use the customer portal and can create support messages.
In this demo you will see the Support Cycle Navigator.
Support at level 1 and 2 is provided by the partner, and SAP only gets involved at level 3* when there is a software defect with the SAP Business One application.

Customers purchase maintenance from the partner, and not from SAP. A portion of the maintenance that customers pay goes to you as a partner for level 1 and 2 support. The customer must be current on maintenance in order to receive Level 3 support from SAP.

Customers who pay maintenance also receive upgrades to new releases, patches, legal enhancements from SAP, and proactive monitoring from SAP using the Remote Support Platform. Therefore as a partner you should ensure your customer is on maintenance. If a customer’s maintenance contract has lapsed, the customer will be redirected to the license portal) instead of the Customer Portal when they try to log in. Furthermore, as a partner you will be unable to create a support ticket for customers who are out of maintenance.

**Note:** Always check the latest maintenance policy published on the PartnerEdge portal.

*Some large enterprise customers receive support from the SAP LE Competence Center.*
It is essential that you have a clear understanding of the support levels:

- **Level 1 and 2**: When the customer reports a problem to you, you are required to perform initial troubleshooting. This includes searching existing information sources, including SAP notes, to determine if there is an available solution. If you cannot find a documented solution, you should reproduce the problem on your own system, using the demo database and the latest patch level. If possible, provide a workaround to the customer. Only if you are sure the problem is in SAP Business One, and is reproducible, should you create a message to SAP. You need to provide as much information as possible, including screen shots, and events leading up to the problem.

- **Level 3**: SAP is only responsible for supporting problems that are directly caused by the SAP Business One software. SAP will validate the accuracy and completeness of the message, analyze, and reproduce the incident, and if necessary, with your help will access the customer system or request the customer database to diagnose the problem. SAP will provide a fix or workaround to get the customer working again. SAP will document the problem and solution as an SAP Note to assist other partners.
You need to provide your customer with the s-user account and password. This enables them to login to the SAP Business One customer portal, where they can create support messages to you, as an alternative to using your support hotline. Customers can create support messages from either the SAP Business One application using the menu Help → Support Desk, or from the support area on the customer portal. Customers can additionally research problems including searching the SAP Notes database to solve problems on their own.

**Note:** If the customer creates a support message, it will be automatically forwarded to you for Level 1 and 2 support. It does not go to SAP. If the customer reports the problem directly to you by phone, you will create the support message if you require Level 3 support from SAP.
Contacting SAP Support

- Message Wizard (preferred)
- SAP Support hotline
- SAP Business One Duty Manager

There are several ways for a partner to contact SAP Business One Product Support:

- **Message Wizard:** To report a problem to SAP for level 3 support, use the message wizard. This is the preferred way of contacting support.

- **SAP support hotline:** Use the hotline to contact SAP Support in case you need to follow up on a previously-submitted support message, or in case you are working at the customer site and there is no Internet access. The hotline number is published in the portal on the contacts page per country. Hotlines are open from 9 am to 6 pm local time.

- **SAP Business One Duty Manager:** The Duty Manager can be contacted only in very exceptional cases, in which the core business processes of your customer’s system are affected outside the working hours.

When communicating with SAP support, English is the preferred language, and a local language is provided only where available.
In the next part of this topic, we will cover support tools.
If a problem occurs with SAP Business One, your customer can use the Support Desk function in the SAP Business One application to connect directly to the support services.

The customer can perform the following actions:

- Search the support databases for known solutions to a problem they are encountering
- Access the customer portal to create a support message to the partner
- Track the status of existing support messages

To use the SAP Support Desk the customer needs:

- A valid maintenance contract with SAP
- A valid S-User
- An Internet connection
The Partner Support Dashboard is the partner’s main interface for supporting customers and is accessed from the Support area of the PartnerEdge portal. Here you can see a summary of your open support messages, and you can create new support messages from here using the SAP Message Wizard.

You can also view messages for the partner organization, and messages submitted to SAP.

Customers can track messages in the customer portal. Additionally, the customer can be notified by email when you send them a new message.
Before creating a support message to SAP, you should search to see if this is a known problem, with a solution.

The cross search is the main tool for research, and allows you to search several SAP Business One repositories simultaneously, making your search process faster. The cross search searches in:

- Support Content
- SAP Notes
- Portal pages
- Help and product documentation, including add-on documentation
- Community content. Note: SAP assumes no responsibility and offers no guarantee for the information or content in the community content.
SAP Notes are solutions for known problems. Whenever a new problem occurs and is subsequently solved by SAP, SAP creates an SAP Note describing the problem and the solution.

You can search by keywords, by application area, by software release, or any combination of these.

A selection of SAP notes is published as SAP Hot News and you can subscribe to receive them on your partner portal homepage or in a personalized newsletter. SAP Hot News are very high priority SAP customer notes. These notes tell you how to resolve or avoid problems that can cause the SAP system to shut down or lose data.
In this demo you will see:

- How to access the Support Desk from the SAP Business One application
- The Partner Support Dashboard in the PartnerEdge portal. This requires an s-user to login.
- The cross search function.
- SAP Notes.
SAP Business One supports logging and tracing of events at the business information level and the system information level during application execution. Only SAP channel partners, SAP Business One super users, and SAP Business One authorized regular users can access the Logger Settings window.

During support processing, you may be asked by SAP support to enable this logging.

The business information level logs information about business flow and business objects. The logs contain all events that are triggered by the actions of users in SAP Business One. This information is displayed to users in the System Messages Log at the bottom of the client screen.

The system information level logs all internal technical messages. These messages contain technical information about the following:

- Internal errors (for example, ODBC error codes, memory errors), warnings, and information messages
- Comments from developers
- Performance logging

You can select the severity levels at both the Business Information level and the System Information level.
The log files provide a source of information that is useful when dealing with incident reports and searching for solutions.

SAP Business One creates a new log file on every startup. The log files are text files containing:

- The event
- The time the event happened
- The exact source code line the event refers to
- The event’s message content

The log files have a unique, predefined name that contains a date, a time stamp, and the Process ID (PID) of the SAP Business One application that created the file. Tracing and logging information, all types of event levels, and severity levels are stored together in one log file.

The log file size is restricted to 5 MB. After the file exceeds the maximum size, SAP Business One creates a new file. The number of log files that can be stored in a logging directory depends on the configuration of the folder size.

For more information, refer to the how-to guide How to Work with Logging and Tracing in SAP Business One.
This demo will show you the logging and tracing provided in the SAP Business One application.
In the next part of this topic, we will cover the creation of support messages to SAP support.
### SAP Support Process

| **Search for a known solution for the problem** |
| **Reproduce the problem** |
| **Isolate the problem to SAP Business One** |
| **Discuss business impact with customer and assign priority** |
| **Provide correct information in the support message to SAP** |

When the customer reports an error to you, you must follow SAP’s support processes:

- Search all available SAP resources to see if known solutions to the customer problem have been clearly documented by SAP. If the issue is known and is resolved in a patch, it is your responsibility to upgrade the customer.
- Reproduce the problem at your own site using a copy of the customer database. If you can reproduce the problem, test it again using the latest patch and release level.
- Even if you can reproduce the problem, it might be caused by something in the client environment that is outside of SAP Business One. Therefore you need to determine if the problem is caused by SAP Business One. You may need to check log files in SAP Business One.
- If you can reproduce the problem at the latest patch and release level, and have isolated it to SAP Business One, then create a support message to SAP. You should discuss the business impact with the customer so you can assign the appropriate priority.
- Provide enough detail for SAP to process the problem. Include a clear description of the problem, with the exact error message, screenshots, and the steps you have taken at level 1 and 2. You should create messages in English.
From the Partner Support Dashboard, you can launch the SAP Message Wizard. The wizard guides you through the process:

- Choose the customer from your list of customers. SAP expects the partner to open a message using the correct customer ID.
- Choose the system (if the customer has multiple systems)

SAP Note 722980 contains some guidelines for creating a support message.
Prepare the solution by entering a brief description of the problem and selecting the applicable component so that the message can be routed quickly to the right support group in SAP.
The wizard will automatically display all known issues that match the problem description you entered. This allows you to thoroughly research possible solutions. You can also use the cross-search, or search SAP Notes from this step in the wizard.
When you create a support message to SAP, you must select a priority. The priority reflects the impact that the problem has on the customer’s business operations:

- **Very High** - You should only assign the Very High priority if the problem is business-critical, has serious consequences for business operations, and requires an immediate solution. **Note**: You must provide a phone number so that SAP support can contact you. This is generally caused by the following circumstances:
  - Absolute loss of a system
  - Malfunctions of core SAP system functions in the production system

- **High** - You should assign the High priority if critical business transactions are affected and urgent tasks cannot be executed. There is some disruption to the customer’s business but the whole business is not stopped.

- **Medium** - You should assign the Medium priority if non-critical business operations are affected. This includes a function that is temporarily unavailable or does not work properly. Work can continue.

- **Low** – You should assign the Low priority if the problem has little influence on business operations and does not hinder daily operations. This includes a function that is temporarily unavailable or does not work properly, which is not required for the daily business process.

**Tip**: SAP Note 795206 contains a full definition of the priorities, and instructions for proceeding with a very high message priority.
In the first scenario, there is a possibility that the database is corrupt. In this case the priority would be set as Very High; otherwise the priority should be set as High.

In the second scenario, even though the system is working normally, the printing of invoices is a key task. If no invoices can be printed by all users, the priority should be set as High. If some users can print invoices, the priority should be set as Medium.

When assessing the priority of a message, a partner can also consider the following factors to help evaluate the business impact to the customer:

- Volume: How many documents or transactions are affected?
- Frequency: How often is the error occurring?
- Is there an event happening or about to happen that might affect the frequency?
- Value: What is the cost/value of the transactions/documents affected?
- Workaround: Is there one?
In the final step you need to supply information on the scenario that caused the problem, the actual and expected result, and the research you have done so far. You can include attachments in this step of the wizard. At any time you can save the message as a draft and work on it later, or submit to SAP support.
This demo will show you how to create a support message using the SAP Message Wizard.
Agenda

- Setting up Support
- Support Tools
- Support Messages
- Remote Support Platform for SAP Business One (RSP)

In the final part of this topic, we will cover the Remote Support Platform.
It is an obligation to install and activate Remote Support Platform (RSP) for customer installations as outlined in the Maintenance Contract for SAP Business One.

Remote Support Platform (RSP) is the primary platform for monitoring your customer’s systems. RSP is provided with the software installation files. RSP can be automatically installed with the SAP Business One Server, or can be installed independently.

RSP monitors the health of the SAP Business One applications, the databases, and the underlying hardware such as disk and memory. It also enables SAP to proactively diagnose system bottlenecks and prevent system issues.

Note: RSP is updated independently of SAP Business One releases.
Remote support platform is installed on the customer’s SAP Business One server. It uses its own database, and does not affect any company databases. RSP provides a secure connection between the customer and SAP for end-to-end support. The components of RSP include:

- **RSP agent service.** The server side of the remote support platform for SAP Business One is installed on the SAP Business One server. The agent service downloads tasks from and uploads task results to the SAP backend of the remote support platform. The agent service also requires that the customer provide an SMTP server for email delivery of reports.

- **RSP agent console.** The client side of the remote support platform for SAP Business One is either installed on the same computer as the agent service, or can connect to the agent service from a different computer on the same network. The customer can administer RSP from this dashboard console.

- **SAP backend.** Management software installed at SAP that is used to manage the remote support platform for SAP Business One support tasks. The SAP backend is exposed as Web services, and the agent service communicates with the SAP backend via HTTPS-based Web services calls. The customer’s server must have an internet connection.

- **RSP studio** for SAP Business One. The studio is a development and management tool for SAP partners. With this tool, partners can develop tasks, deliver self-developed tasks to customers, and manage self-delivered tasks for different customer installations.
The agent console provides an on site interface for the customer to monitor their system. The console displays the system status indicators for each database. Once the connection is set up, SAP will send tasks to the RSP agent. From the console you can access and run these tasks, and send the results to SAP. You can also download software updates, and upload databases to SAP support.

As a partner you can access the tasks in the customer’s console remotely. If you enable *Allow Remote Management* in the agent consoles for your customers, you can monitor multiple customers using a web-based interface called remote console. A link to the remote console is provided on the SAP Partneredge portal. You need an s-user to access the web-based interface.
After installation, you need to configure RSP by running the initialization wizard. The wizard opens up automatically after you install RSP. After you successfully configure the settings, in the final step, you can generate and automatically send a system status report to SAP, which registers the installation of the remote support platform. You can also configure RSP from the agent console screen by choosing Configuration from the menu.

The four main configuration areas are:

- **Directory channel.** This is optional. If you enable it, provide a file path for the storage of task results. A path to a folder for content upload. You can specify a window of time for the upload as well as a maximum upload rate to conserve network bandwidth.

- **E-mail channel.** The e-mail channel optional and is used to send notifications to the customer when certain events occur. To configure it, provide the customer SMTP server settings and email address. If you do not want the remote support platform to send out e-mail notifications, do not enable the e-mail channel.

- **SAP channel.** You must configure the SAP channel. Provide the license information and the s-user and password for authentication. The agent service cannot connect to the SAP backend without these credentials. From here you can select the option to allow the partner to remotely manage the system using the remote console.

- **Partner channel.** The partner channel is optional, but if you enable and configure it, the RSP agent service can retrieve tasks created by the partner and send task results back to the partner’s WebDAV server.

Other menus are available from the agent console Configuration menu to configure and schedule database backups using RSP.
RSP Tasks

- RSP uses tasks to monitor and manage a system.
- Agent service connects to SAP to download new and updated tasks.
- Customer always has the option to approve or reject a task.
- System status report task is visible immediately after RSP installation. This report must be run, to register RSP with SAP support.

RSP uses *tasks* to monitor and manage a system. At scheduled times, the agent service automatically connects to SAP to download new and updated tasks. From the agent console you can view and run tasks from SAP. The customer always has the option to approve or reject a task and can elect to run tasks automatically, based on a schedule, or manually.

The task for the system status report is built-in and visible immediately after RSP is installed. It checks available disk space, backup statistics, and data load of the customer’s installation. The customer is informed of the results. The system status report must be run at this point, since it registers RSP with SAP support.

This report should be run on a regular basis, and identifies critical issues before they become a problem. And since SAP has this information, it can result in faster support from SAP.
Other tasks are provided to streamline support and maintenance and include:

- System data describes the technical information on a customer’s installation and must be kept up-to-date by the partner. RSP eliminates the need to manually update this data by automatically sending the installation data to SAP.

- Ongoing diagnosis of issues is provided without manual intervention. For known problems, SAP transmits a report with a resolution to the issue. The support partner can, with the customer agreement, run a self-healing wizard task and apply a fix to the customer’s system.

- Customers and partners receive proactive notifications on new software updates and can either set RSP to automatically download recommended updates, or choose to manually manage the updates. There is an option to specify a bandwidth speed and time of day to avoid connectivity lags during business hours. Note: RSP is itself maintained using silent installations and upgrades, eliminating additional configuration or maintenance efforts from the customer.

- Using RSP, partners or customers can establish a backup schedule to automatically backup company databases, including attachments, according to the schedule.
Company databases can be backed using either the Microsoft SQL Server backup function, or using the Remote Support Platform (RSP).

- The Microsoft SQL Server Management Studio backup supports backup to both disk and tape. It does not backup the files in the shared server folders, therefore you must back these up separately.
- The Remote Support Platform provides built-in backup services. You need to enable RSP backups first, from the agent console. You can schedule daily, weekly, and monthly backups and perform differential and full database backups. The RSP backup service also includes the shared server folders.

Note that the SBO-Backup service from older releases of SAP Business One has been superseded by functionality in Remote Support Platform (RSP).
During the process of level 3 support, a partner may receive a request for the customer database from SAP. The support partner can easily upload the database using RSP. The database is automatically compressed for upload.

If you receive a task requesting you to upload a company database to SAP Support, you can do this using the Content Upload Wizard available on the Download & Upload tab of the agent console.

This replaces the FTP service used in prior releases of SAP Business One.
This demo will show you RSP and the System Status Report.
The Remote Support Platform (RSP) Studio for SAP Business One enables partner companies to create their own tasks for customers. Partners can download tasks to customers and upload task results. An example might be a task to monitor an installed add-on.

The Studio provides a development environment for creating simple and advanced tasks:

- Simple SQL tasks allow the partner to run perform basic database operations
- Simple PowerShell tasks allow the partner to perform remote administrative tasks on customers' Microsoft Windows operating systems. These tasks are created using Microsoft Windows PowerShell scripting. Templates are provided to quickly create these tasks based on common scenarios.
- Advanced tasks enable the partner to perform remote administration on the customer's system, or to request a customer database upload.

Note: For more information, refer to the how-to guide Working with the Remote Support Platform Studio for SAP Business One.
Summary: Support Tools and Resources

- Support Cycle Navigator
- SAP Notes
- SAP Business One Cross Search
- Expert Empowerment Sessions (PSA)
- Documentation Resource Center
- SAP Community Network (SCN)
- Landing Pages for RSP and AIP
- SAP Business One Online Help
- Partner Support Dashboard
- Software Download Center

Write down the quick links for access to the resources on the portal:
Here are some key points to take away from this session:

- The SAP Business One Support Cycle Navigator is a guide that you can follow to set up a support department. You can find the information on the PartnerEdge Portal.

- Customers must pay for maintenance in order to receive support. Support level 1 and 2 is provided by the partner, and SAP only gets involved at level 3 when there is a software defect in SAP Business One. If the customer creates a support message, it will be automatically forwarded to you for support. It does not go to SAP.

- You are required to follow SAP’s support processes. You must isolate the problem to SAP Business One before creating a support message. The Partner Support Dashboard is the partner’s main interface for supporting customers and is accessed from the Support area of the PartnerEdge portal. You can use SAP search tools from here to search for known solutions for a problem.

- When you create a support message to SAP, you must select a priority. The priority reflects the impact that the problem has on the customer’s business operations.

- It is an obligation to install and use Remote Support Platform (RSP) for customer installations as outlined in the Maintenance Contract for SAP Business One.


- RSP automatically updates the customer’s system data, thereby eliminating the need to manually update this data.
Thanks!

You have completed the topic for support processes in SAP Business One.

Thank you for your time!