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Aptean Austria rs2

# Customer Service Handbook

Revised: January 2023



# About the Handbook

This document provides customers with comprehensive information to assist them in utilizing all aspects of our Customer Success resources. Consult this Handbook for Customer Success contact information, resources and processes, and descriptions of Support offerings.

*Note: Please refer to the most current online version of this handbook on our Customer Portal for the most up-to-date information. The services described within are subject to a customer having a current maintenance or subscription agreement with Aptean. Aptean reserves the right to change the terms and conditions of their support services for its product lines, including the Aptean Austria product suite.*

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# Quick guide – How to place tickets in 4 steps

The screenshot shows the Ramsauer Stürmer Business Software interface. The 'CREATE A CASE' form is visible, with fields for Account, Product, and Description. A login window for Apteian Connect is overlaid on the form. Red boxes and numbers 1 through 4 highlight the steps:

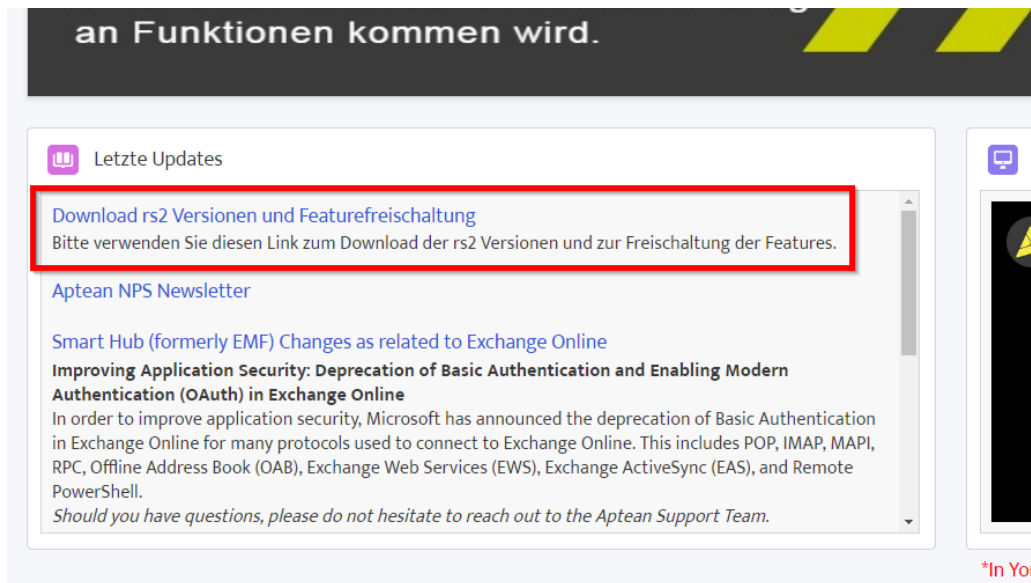
- 1) Select "Ticket erstellen" for a request to our support or "Consultinganfrage" for a request to customize your products to the consulting team. You will then be forwarded to Apteian Connect.
- 2) Select a meaningful subject for your inquiry.
- 3) Provide a detailed description of your request (see screenshot).
- 4) Click on "Create case" to send the request.

- 1) Select "Create ticket" for a request to our support or "Consulting request" for a request to customize your products to the consulting team. You will then be forwarded to Apteian Connect.
- 2) Select a meaningful subject for your inquiry.
- 3) Provide a detailed description of your request (see screenshot)
- 4) Click on "Create case" to send the request.



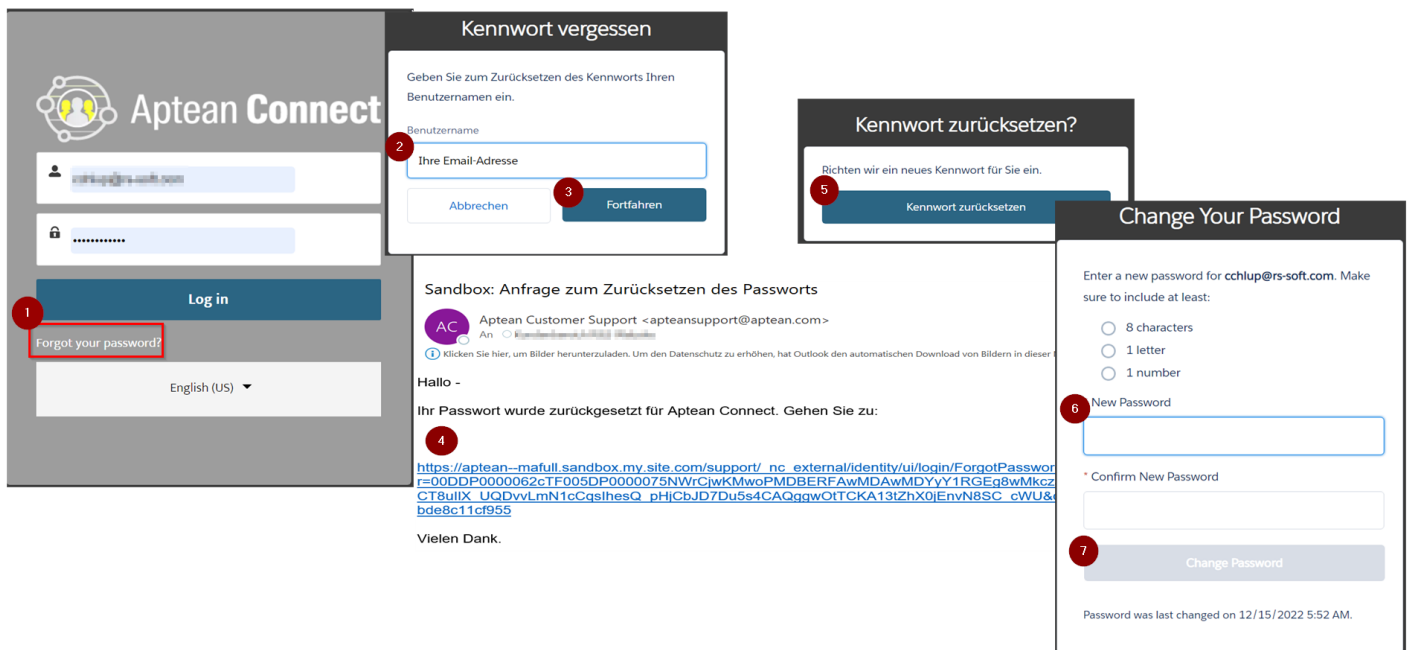
## Important note for downloading the version and licenses:

- Download and features remain as usual
- Available from Aptean Connect Portal <https://connect.aptean.com/>



- Available via the website of Aptean <https://www.aptean.at/> á Aptean Connect
- Directly accessible via <https://servicecenter.rs-soft.com/>
- Here you can download the versions and activate the features using your existing credentials.

If you have problems with the login for Aptean Connect



- 1) At the log-in page, select “Forgot your password”
- 2) To reset your password, enter your username.
- 3) Confirm the reset
- 4) You will receive a link to reset your password at the specified e-mail address.
- 5) Confirm again
- 6) Enter a new password. Above you see the criteria
- 7) Confirm the change

## Overview – Our Mission

Maximize customer success by providing timely and accurate resolution to our customers and partners.

This handbook outlines our support policy and process, and how you can obtain the most benefit from our resources. We aim to provide you with the highest level of service to help you get the most from using our products.

We understand how critical our software is to your business. Our Customer Service team consistently responds to the business needs of our customers, providing industry-leading levels of support.

Our Customer Service management team uses your input to continuously improve the delivery of technical application and systems support. After we have closed a service Case we will ask you to rate the quality of our support through a satisfaction survey. We use the survey results to gauge support quality and to drive changes within our department.

Our online Customer Service Portal, Aptean Connect, (<https://connect.aptean.com/>) provides direct access to a wealth of information, including:

- Company Profile and Contact maintenance
- Knowledge Base
- Case submission, management, and reporting
- Documentation downloads
- Aptean Learning Center - educational training videos and resources
- Updating your profile via Account Administration option available on Home Page
- Product-related information such as datasheets, webinars, etc.

Some of this information is not yet available, but will be gradually integrated into the portal in the future. It is worthwhile if you stop by regularly.



# Maintenance & Subscription Support

## Support Offerings

The following services are available as part of the standard Aptean Austria Software maintenance or subscription agreement:

- 24x7 access to our Customer Service Portal resources
- Access to Customer Support Telephone Hotlines
- Access to maintenance updates and new product versions
- Newsletters, bulletins, technical alerts and webinars
- Invitations to annual Customer Conferences and User Group events
- Access to Aptean Learning Center, including training resources and videos

Some of this information is not yet available, but will be gradually integrated into the portal in the future. It is worthwhile if you stop by regularly.

## Hours of Operation

Our Customer Service Team is available to assist you during the following hours:

Hours of Operation	Exclusions
08:00am – 17:00pm CET Monday till Friday	Public Holidays In Austria including 24 <sup>th</sup> and 31 <sup>st</sup> December



# Open a new support case

as mentioned above – the quickest way is directly via the help in your program.

Do the same if you want to create a consulting request, but instead of "Create ticket" click on "Consulting request".

If the program is not available, you can also create a request manually in Aptean Connect:

The screenshot shows the 'CREATE A CASE' form in the Aptean Connect interface. The form is divided into several sections. At the top, there is a navigation bar with 'Support' and 'Case Management' highlighted. Below this, there is a 'CREATE A CASE' section with various fields. The fields are numbered 1 through 9. 1. 'Case Management' link in the top navigation bar. 2. 'Create New Case' button. 3. 'Product' dropdown menu. 4. 'Product Version' dropdown menu. 5. 'Component' dropdown menu. 6. 'Type' dropdown menu (with a red box around it and a note: 'Select general enquiry or consulting enquiry/customizing'). 7. 'Subject' text input field. 8. 'Description' text area. 9. 'Attach supporting documentation' button (with a red box around it and a note: 'Full screen screenshot of the faulty program'). There are also other fields like 'Account', 'Contact', 'Email', 'Phone', 'Customer Reference', and 'Send a copy of all notifications to these emails'. A 'Launch' button is at the bottom left, and a 'Create Case' button is at the bottom right.

- 1) Select Case Management
- 2) Create a new case
- 3) Product is a mandatory field and predefined as "Module Base"
- 4) Specify the product version to which your request relates
- 5) Select the appropriate component from the department for which you are sending the request (e. g. material management or financial accounting)
- 6) Select the appropriate type (by default "General Enquiry" is selected)
  - a. General enquiry for support enquiries
  - b. Consulting request (Customization)/Adaption for requests to adapt your products to the consulting team
- 7) Choose a meaningful subject
- 8) Provide a detailed description of your request
  - a. Complete it with a screenshot of your full screen and upload the file under "Upload File".
- 9) Click on "Create case" to send the request



# Severity Level & Initial Response Times

## Initial Response Time

The initial response time refers to the time between you submitting a new service Case and the first contact from the Customer Success Team. It is also referred to as the Service Level Agreement or SLA. Our target response times fall within our operational business hours which are detailed within our Hours of Operation.

## Select the Appropriate Severity

When logging a support Case, you will need to select the severity level of a Case when you submit it. We request that you use your best judgment when selecting the severity level for an issue as we use it to prioritize work fairly and appropriately for the situation.

The Four Severity Levels are:

Severity	Severity Definition	Standard	Premium
	Target Initial Response Times		
1 – Critical	System down, cannot access system, or critical business processes affected*	4 hrs	
2 – Urgent	Production functionality not working; critical business processes affected*	2 days	
3 – Standard	Business moderately impacted, users can work; efficiency is hampered	8 days	
4 – Low	Business not impacted significantly; issue is annoying or an enhancement	14 days	

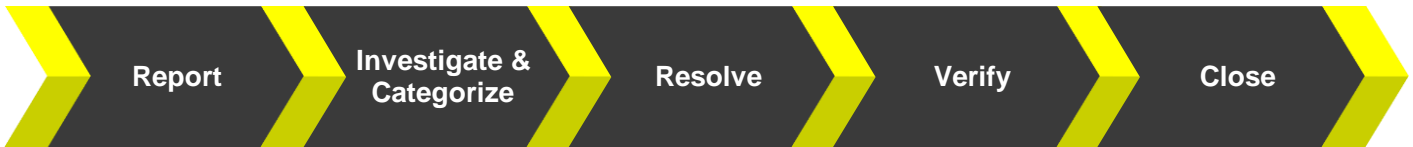
\*We request that you provide a brief description of the impact and rationale for urgent and critical severity levels.

The above-mentioned response times are the standard response times without special regulations, but may differ due to individual and contractual support agreements between Aptean Austria and the customer. As a rule, the severity levels “Critical” and “Urgent” are processed as a priority and faster, but cannot be guaranteed without separate regulation.

We can change the severity of a case during its lifecycle. For example, we may change the severity due to a workable method or the lack of ability to reproduce the problem. We can also increase the severity due to the increasing frequency of the problem or due to project deadlines.



# High-Level Support Process



We aim to keep the Support Process consistent and easy to understand, regardless of the type of Case, its severity or when it is raised. It is important to note that your Customer Success Team is your key point of contact and in most s, will be able to resolve the Case directly. There will be times when support and R&D will work together to assist with the triage and resolution.

Below are the key process stages with additional information to help progress and resolve Cases as quickly and efficiently as possible:

## Report

To improve resolution time and your Customer Success experience, you should take the following steps before reporting your issue:

- Explore the problem to ensure that it is related to the rs2 software:
  - Eliminate the possibility of a setup issue by verifying configuration, system settings, file locations, directories, paths and access
  - Analyze recent changes to the system or to your environment
  - Review release notes, manuals and online help
  - Attempt to recreate the issue, isolate variables and understand the business scenario
  - Document replication conditions and steps, collect screenshots of error messages and obtain relevant logs
- Please note that hardware, network issues, or certain third-party applications may be out of maintenance scope.

At the moment not all resources are available. We ask you to take this into account and use the options that are already available.



## Provide Relevant Details

When logging a Case, you will need to provide the following details:

- rs2 program and version where the problem exists
- The actions being performed when the problem occurred
- The exact wording of displayed error messages
- Steps required to duplicate the problem
- Any recent changes to the system prior to the issue arising
- Investigation and troubleshooting steps taken prior to contacting us
- Associated third party products
- Any supporting detail, such as screen shots and logs
- If an urgent or critical severity, explain the impact of the issue (see Setting Severity Level above)

## Investigate

- Having received the information above, the Customer Service team will investigate the request.
- The nature of the query will determine the subsequent investigation steps.
- If the Customer Service team cannot resolve the issue, they may need to escalate the Case internally.
  - Please refer section Case Escalations for additional information.
- The Customer Servicew team will keep you informed throughout the process to ensure all parties are up to date regarding the status of the Case.
- Please refer section Case Types to help illustrate the typical contact categorizations.

## Resolve, Verify, and Close

- Resolution may take one of several forms:

Identify and recommend a work around in order to enable the business to progress

Identify and implement a full solution which resolves the issue at source

Providing knowledge/advice to you (and therefore no changes to your solution)



- If applicable, the Customer Service team will document and validate the steps in a test environment to resolve the Support Case, ensuring a successful resolution before handing the resolution steps over to you to implement.
- The Customer Service team will work with you to identify the quickest (and most appropriate) way to resolve a Case, and ensure the resolution steps are implemented successfully.
- The Customer Service team may ask for your input to create a knowledgebase article for the resolution.
- Please refer to the Closing a Service Case section for more information on when the Case is closed.

## Case Types

- The most important are:
  - General enquiry – These automatically land in support
  - Customization – These automatically end up with the assigned consulting team
- If you are able to identify a unique type, the following options are available to you:

The Case type denotes the nature of an incident and the area of the company that it is related to.

Type	Definition
Aptean Support Center	Related to an issue with the Aptean Support Center portal.
Beta	Used by beta customers to report issues with an Aptean beta product
Bundles	Used for Upgrade Bundle Packages. Case used for tracking by the Project Manager
Cloud	Related to an issue in the Aptean cloud hosting environment. Handled by the Cloud team.
Customization	Related to a customization.
Documentation	Related to product documentation
EDI	Used to report issues with or requests for new EDI functionality.
Education	Related to education and/or training services.
Enhancement Request	Enhancement request for an Aptean product.



Environment	Related to the customer's environment.
General Inquiry	Related to a question about an Apteian product, or about Apteian.
Hardware	Related to a hardware issue for the customer.
Installation	Related to an installation issue.
License Request	Request for a new license for an Apteian product.
Knowledgebase Suggestion	A suggestion for an addition to the Knowledgebase.
Product Issue (Default)	Related to a problem or issue with use of an Apteian product.
Services	Related a problem or issue with, or a request for, Apteian professional services.

## Closing a Service Case

We keep service Cases open until you confirm that the issue has been resolved by the information your Customer Service team provided. If you do not respond to the information provided, the case will automatically be changed to "Pending Closure" after 7 days and you will receive a confirmation email. If more information is available, you may reopen the same case within 14 days to continue the investigation. After that, a new case has to be opened.

Status	Definition	Time before Auto-close
Close Pending	Customer Success believes they have resolved the issue, and waiting for customer confirmation	14 days without a response from the customer

## Customer Satisfaction

When we close a Case, we automatically email a customer satisfaction survey from to the customer contact. We urge customers to complete these surveys as they are used to measure the quality of the support and the actions and expertise of the Customer Service team.

Customer Service Team Leads and Managers review all surveys and follow up where appropriate. Your input is a key driver of changes in our systems, resources and processes.



# Case Escalations

Our Customer Service team works to ensure that support Cases are assigned and progressed as quickly as possible.

You may request to escalate a support Case at any time, based on the impact an issue has on your business if:

- A Case is not resolved in a timely manner.
- A decision is made to not fix a functionality issue.
- You are concerned about how the Case is being handled.
- The Customer Service Manager responsible will be notified immediately if a Critical severity Case is logged.

**Below is a summary of the escalation path available:**

Level of Escalation	Aptean
Level 1	Lead Customer Service Manager
Level 2	Senior Customer Service Manager
Level 3	Director, Customer Service Aptean DACH
Level 4	Chief Operating Officer (COO)



# Outside of Support

## Non-Supported Services

Aptean reserves the right to charge our standard billable rates for investigating any reported problem that is found to be caused by factors not covered by support and maintenance.

Aptean does not provide support for the following, however a billable services engagement could be requested:

- Changes in the customer operating environment which adversely affect the software
- Use of the software in a manner not specified in the documentation
- Assistance in troubleshooting or writing customizations created by someone other than Aptean
- 3rd Party Software Report writing
- Business process consulting, configuration, and over the phone implementation services
- Integration – Including general support, how to's, changes
- Impact assessment of any configuration, environment or system growth changes
- Networking or system administration assistance
- Involvement of any customer project or change management process
- Matters beyond Aptean's control

Definitely in Support	Clarification and Triage Required	Out of Scope for Support
Basic How/To questions	Errors: are they caused by the applications? E.g. customizations, external applications, etc.	<ul style="list-style-type: none"><li>• Special requests for standard functions and setup of these findings</li><li>• Aptean Austria trainings, which can be ordered via fee-based-services</li></ul>
System error messages	How/To questions – depending on user knowledge, recommendation may be to invest in training / consulting	Impact assessing: <ul style="list-style-type: none"><li>• Proposed Configuration changes</li><li>• Environment / hosting changes</li><li>• Server / network resourcing</li><li>• System growth management</li></ul>
Technical questions based on existing documentation	Maintaining Industry compliance	
Unexpected software behavior	Diagnosis of integration issues between Aptean products and/or authorized 3 <sup>rd</sup> party applications.	



- customizations and integrations
- upgrades
- Testing provided customizations, handled through billable services

## Professional Services

If your desired additional services are not covered under maintenance or subscription you can order additional (paid for) services as defined in the appropriate section of the maintenance / subscription agreement.

In general, the following professional services are available at Aptean's standard billable rates. Contact your Account Manager for more information:

- Assistance in writing Aptean software custom reports
- Assistance with the design, creation and support of bespoke customizations and Integrations
- On-site training
- Business process consultation and Implementation services
- Client installation, data conversion, project management
- Impact assessments, Support of User Acceptance Testing of configuration of environmental changes
- Other professional services as mutually agreed



# Compliance

Aptean Customer Service provides oversight to ensure that teams are in compliance with established processes and procedures. Aptean's governance model is as follows:

Process		
Development		Training
Analytics		
Dashboards	Metrics	Reporting
Quality Assurance		
Audits	Controls	Surveys
Continuous Improvement		
Best Practice Adoption		Industry Benchmarking

**Process:** Standardized processes are developed to ensure that Aptean customer success personnel operate in a unified and consistent manner. Training is conducted on an on-going basis to ensure that personnel are well-versed in processes and tools.

**Analytics:** Standardized metrics are used to monitor the activity of the customer success teams. Dashboards are used to provide metrics to leadership and executive management, and compared against company and industry benchmarks, to ensure the highest levels of customer satisfaction.

**Quality Assurance:** Audits of Case activity are performed at specific points during the Case lifecycle, to assess whether the analysts have followed defined processes, and to ensure that customer service levels are meeting established targets. Samples of open and closed Cases received within a month are audited, and phone calls are periodically monitored. Process controls are also in place to ensure security and safety of customer data both in-house at Aptean as well as when accessed remotely.

**Continuous Improvement:** Industry best practices are continuously reviewed and adopted to ensure the customer success teams are up-to-date in process and tools. Industry benchmarking is performed on a regular basis to ensure that metrics are on-par with or exceeding the industry.



# Maintenance & Subscription Renewals

## An Investment in your Success

Aptean solutions are an investment in flexible technology that can help your company create and maintain a competitive advantage. Renewing your annual maintenance or subscription provides extra resources to optimally sustain and enhance the value derived from Aptean applications.

Enjoy full access to all the benefits of annual subscription:

## Research & Development working for you

Our Research & Development teams are continually at work, exploring new technologies and new ways to enhance our applications.

## World-Class Customer Support

- **Exceptional service:** We're proud ourselves on the overall customer satisfaction with our customer service team. If you are not satisfied and you let us know through a service Case survey, we'll be in touch to find out why and make sure we learn and improve.
- **Expertise:** Access to a global team of product experts with proven investigative and troubleshooting skills.
- **Easy access:** Through our Customer Portal or the hotlines, our Customer Service team is available to you. Once you've contacted us, we use remote support tools and industry best practices on troubleshooting and effective Case queue management to get to the root of your issue and find a resolution.

## Education

The following education services are available as part of the standard Aptean Austria Software-maintenance or subscription agreement.

### Aptean Learning Center

Aptean Learning Center is an essential resource to help you hit the ground running with Aptean Austria. Whether you want to review what's new in the latest version, or configure a report, this is the place to start.

We have catered for all Aptean Austria users, from the end user to the system administrator, so visit the Customer Portal to find your answers.



## Getting Started

Aptean Learning Center contains a list of bite size easy to follow recordings, giving you chance to learn about our products at your own pace, during your own time.

We're always adding new content to make sure we're helping our customers get the most value out of their subscription.

## Product Documentation

Product Documentation is available through the Aptean Customer Support portal, and is available with annual maintenance or subscription.

## Knowledge Base

We have a large knowledge base of tips & tricks, and answers to numerous questions. This is the place to go if your subject isn't covered in a recording, or you have an error you don't understand. Start your search here.

## Customer Events

We offer free Webinars introducing you to new products and services and presenting ideas on optimal use of the applications for your industry. We also participate in and host in person regional events allowing you to network with fellow customers and interact with Aptean product experts.

## Aptean Contact

Your Aptean Contact (Customer Service Manager / Account Manager) is responsible for ensuring your success and satisfaction with our products. They can help you stay up-to-date with new products, services, and opportunities, as well as help you plan upgrades, migrations, and other projects.

Some of the offers listed here are not yet available and will be integrated and made available to you in the future.

## Ensure Ongoing Success

Your annual maintenance payments deliver continuous value from multiple resources and ongoing enhancements to your Aptean solutions. Ensure your team has the support and resources they need, when they need them.

To learn more about the services and offers offered to you with the maintenance for Aptean Austria from Aptean, please ask our Customer Service Team to connect with your customer service representative.

## Feedback

Our Customer Success team wants you to be satisfied with your Aptean Austria solutions and your experiences with us. Please do not hesitate to contact us with any questions, comments, suggestions or concerns.

## Aptean Customer Success Portal

Login at: <https://connect.aptean.com/>



## Contact Us

rs2 Customer Support			
Number	Hours of Operation	Location	Holidays Observed
+43 662 63 03 09-200 (Support-REWE) +43 662 63 03 09-300 (Support-WAWI)	08.00 to 17.00(CET) Monday to Friday	Bergheim, Austria	All Public Holidays In Austria including 24 <sup>th</sup> and 31 <sup>st</sup> December

Please refer to our website for the most current details at <http://www.aptean.com/en/Support>

## Aptean Headquarters

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