



ORACLE

Safe harbor statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions.

The development, release, timing, and pricing of any features or functionality described for Oracle's products may change and remains at the sole discretion of Oracle Corporation.

ORACLE

Working Effectively with Support for Oracle B2C Service

Oracle Support Essentials

Oracle Support Training & Education

Learning Objectives



Explore the Oracle B2C Service Support Portal and discover all the resources it has to offer



Understand when and how to create Service Requests to get assistance



Utilize the resources and tools available to be more proactive and minimize the need to log a Service Request

Working Effectively with Support - B2C Service

Agenda

- 1 **First Steps for Site Administrators**
- 2 The Support Portal
- 3 Engaging Support Through Service Requests
- 4 B2C Service Updates
- 5 Customizing Your Site
- 6 Additional Resources

Oracle B2C Service – The Support Portal

Navigation Menu

<https://cx.rightnow.com/>

One stop shop:

- Create and manage users
- Search Knowledge Base
- Manage Your Services
- Read the Support Blog
- Submit a Service Request
- Manage Notifications
- Access Tutorials
- Read Discussion Forums
- Access the Cloud Portal
- Find a Partner
- Much, much more!

The screenshot shows the Oracle B2C Service Support Portal. At the top, there is a navigation menu with links for 'Support', 'Learning', 'Community', and 'Paid Services'. A green arrow points to the 'Support' link. To the right of the navigation menu is a search bar and a 'Login' button. Below the navigation menu is a large banner with the text 'Oracle B2C Service'. Underneath the banner are five service tiles: 'Get Started with Technical Support', 'B2C Service Technical Support Webinars', 'My Support Experience Dashboard', 'Business Success Resources', and 'Oracle LaunchPad'. Below these tiles are four tabs: 'Featured', 'My Recent Requests', 'My Organization's Recent Requests', and 'Support Updates'. The 'Featured' tab is selected, showing a large banner with the text 'Oracle's commitment to our customers during the COVID-19 crisis'. Below the banner are three columns of content: 'New Support Answers', 'Featured Videos', and 'New Blog Posts'.



Oracle B2C Service – First Steps for Site Administrator

ORACLE Search Welcome, Cynthia Account Manager Connect Logout

Support Learning Community Paid Services

My Site Tools

This page includes information and tools for managing your Oracle Service Cloud implementation. From here, you can manage Oracle Service Cloud Support contacts, schedule upgrades, and find end-user and admin links, license usage, bandwidth, disk usage, and more for your Oracle Service Cloud implementation.

Contact Management	Hosting Services	Additional Tools
Contact Management Tool	Request a Release Update	Auto Update Program Calendar
My Partners	Spam Filtering	Support Experience Organization Search

Add contacts for your organization so they can take full advantage of the Support Portal.

1. Log into the Support Portal to access Contact Management.
2. Click on Site Tools in the upper right, followed by Contact Management Tool
3. From here, if you have Manage Contacts Service Privileges, you will be able to add, disable and edit your organization's contacts.
4. For adding Partners, see Slide #14.

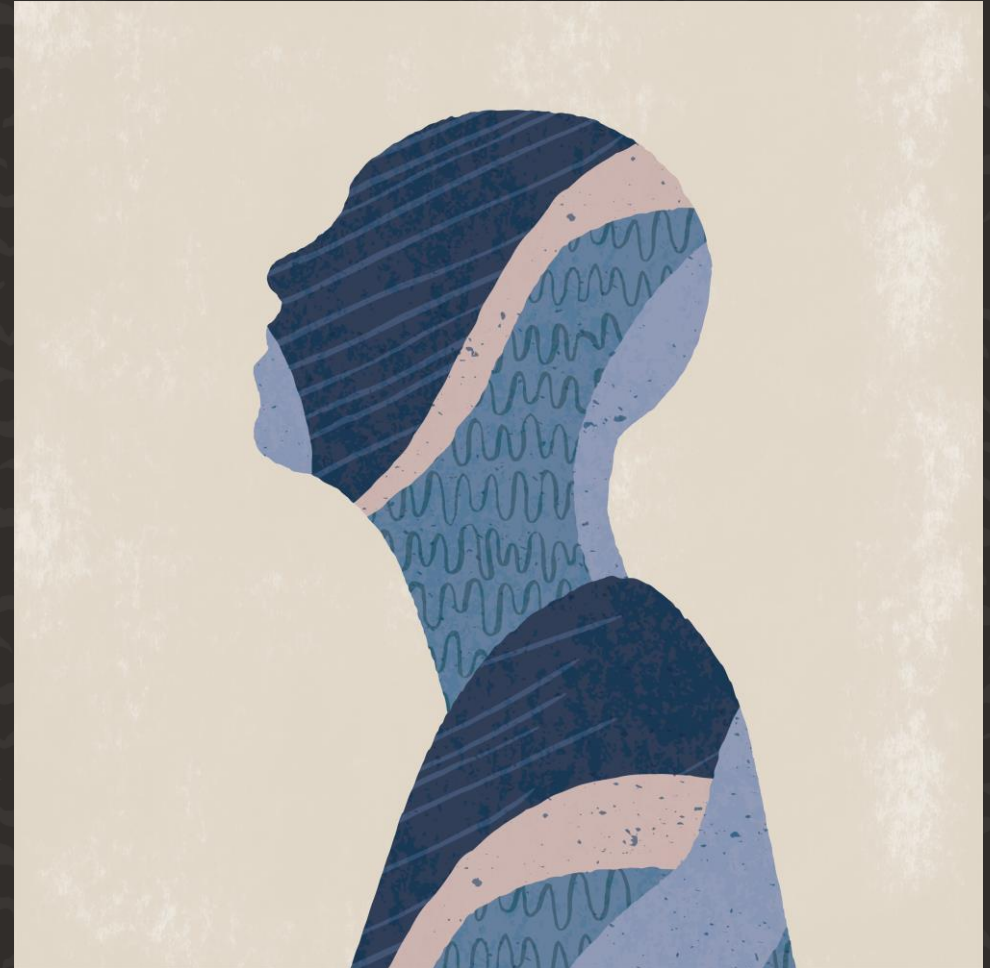
Two Roles Vital to Success

Site Administrator

Primary Support Contact
Responsible for Contact Management
Create users and profiles
Configure settings
Customizations

IT Contact

Infrastructure Compliance
Maintain Workstations
Network
Troubleshooting
One contact for each location and shift



Oracle B2C Service – Adding Contacts

Create A New Contact

For more information on using this tool, please visit [Answer 1560: Adding and updating designated Support contacts](#).

* Denotes a required field

Email Address *

First Name *

Last Name *

Phone *

Contact Permissions *

Manage Contacts

Local Timezone *

Please select...

Primary Support Contact (?)

Receive Version Update Notifications (at least one person within your organization must receive the version update program notification).

Please note: Following a successful creation of a contact, an email will be sent to the new contact which will contain welcome information and instructions on how to set their password.

- Contact Permissions:
 - Manage Contacts: Access KB, Submit SRs, Add/disable contacts
 - Designated Support Contact: Access KB, Submit SRs
 - Knowledge Base (KB) Access: Access Full KB and Community Forums
- Minimum of 3 Contacts with Manage Contacts Permissions for sufficient Disaster Recovery backup
- Primary Support Contact – a main point of contact and security gate for your organization
- A partner can be the Site Administrator but there must also be someone from your organization with administrator permissions. **The Support contract is with the company, not the partner.**
- See [KB 1560](#) for more details

For security purposes, generic contacts – such as [custserv@acme.com](#) – are not allowed. Contact records must be associated to each individual user.

Oracle B2C Service – Contact Management Responsibilities



- Each customer is responsible for creating and updating their own organization's contacts.
- Contacts who can submit an SR should have product and technical knowledge.
- Maintain your existing contact list and disable contacts when appropriate.
- Recommended: Audit contact list every 6 months.
- Further details of Contact Management: https://cx.rightnow.com/app/answers/detail/a_id/4715

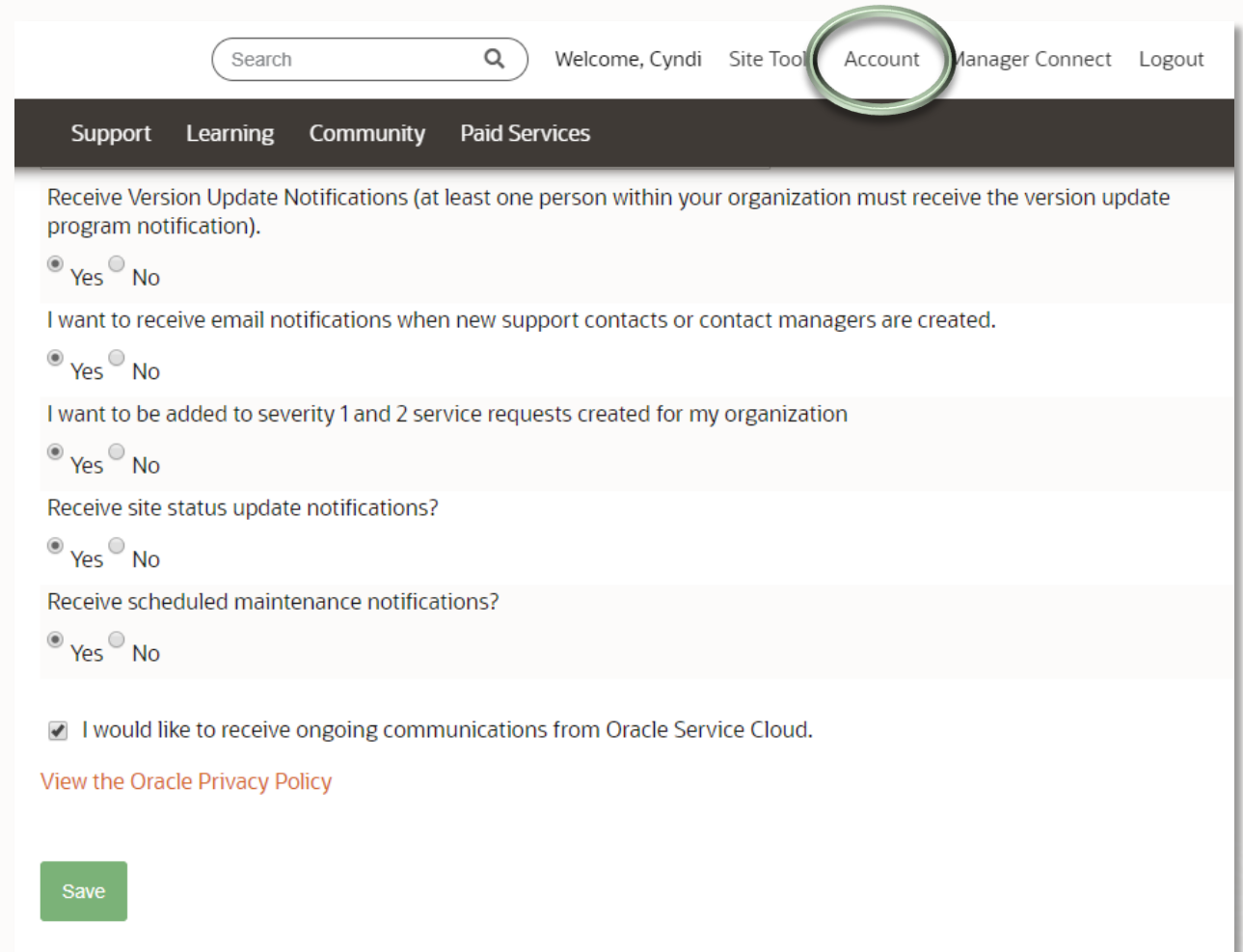
For the security of your site's customer data, we cannot provide Technical Support to anyone who is not a Designated Contact nor can we add contacts without a request via a Service Request. Therefore, it is in your best interest to keep this information current at all times, as it is used for providing Technical Support.

Oracle B2C Service – Notifications

- As your organization’s Site Administrator it is highly recommended that you subscribe to all Hosting and Customer Service notifications.
 - Among other things, these subscriptions will make you aware of any scheduled and unscheduled service interruptions.
1. Log in to <http://cx.rightnow.com> and click on Account.
 2. Click on Account Settings and scroll to the bottom of the page.
 3. Select “Yes” for all notifications and Save.

For further details, see:

https://cx.rightnow.com/app/answers/detail/a_id/5795



The screenshot shows the Oracle B2C Service Account Settings page. At the top, there is a search bar and navigation links: "Welcome, Cyndi", "Site Tools", "Account" (circled in green), "Manager Connect", and "Logout". Below the navigation bar, there are tabs for "Support", "Learning", "Community", and "Paid Services". The main content area contains several notification settings, each with a "Yes" or "No" radio button:

- Receive Version Update Notifications (at least one person within your organization must receive the version update program notification). Yes No
- I want to receive email notifications when new support contacts or contact managers are created. Yes No
- I want to be added to severity 1 and 2 service requests created for my organization Yes No
- Receive site status update notifications? Yes No
- Receive scheduled maintenance notifications? Yes No

At the bottom, there is a checked checkbox: I would like to receive ongoing communications from Oracle Service Cloud. Below this is a link: [View the Oracle Privacy Policy](#). At the very bottom, there is a green "Save" button.

Support Packages – Platinum Level Support



- ✓ Multi-Tenant SaaS Architecture
- ✓ Fast issue resolution
- ✓ 24/7 “All Hands On Deck” response for Severity 1 Issues
- ✓ Detailed Communications - 5 Ws (What, Who, When, Where, Why)
- ✓ Dedicated Implementation Support
- ✓ Complementary Digital Guided Learning on demand
- ✓ Proactive Service Request Health Monitoring
- ✓ Multiple Feedback Channels

Oracle B2C Service – Working with Partners

By choosing an Oracle Partner Network member specialized in Oracle B2C Service you are getting a partner that has:

- Met stringent, product-specific competency and business requirements demonstrating the knowledge, experience and commitment to help a customer's business succeed
- Had successful previous partner implementations verified by both Oracle and end users
- A proven track record with recent successful Oracle product transactions



Find an OPN certified partner here:

<https://partner-finder.oracle.com/catalog/scr/Partners/index.html>

Oracle B2C Service – Adding Partners as Contacts

Contact Managers can add and edit permissions for partners

1. Log in to <http://cx.rightnow.com>.
2. Click Site Tools
3. Click My Partners under Contact Management

It is your responsibility to manage your partners. Make sure to keep access permissions updated.

For further details on adding partners see:

https://cx.rightnow.com/app/answers/detail/a_id/10141

For partners needing access to customer SRs, see:

https://cx.rightnow.com/app/answers/detail/a_id/10140

Contact Management

- + Add a partner contact
- + Associate a partner organization
- + Add an Oracle contact

Partner email address

Select a permission level by clicking the icon below

CC	Look	Update	Create	Admin
Partner can view service request if they are additional contact. Cannot update service requests.	Partner can view all service requests from this organization. Cannot update service requests. Partner will receive update notifications for customer sites.	Partner can view all service requests from this organization. Can update service requests if they are cc'ed or marked as the point of contact.	Partner can view all service requests for this organization. Can create service request. Cannot request configuration changes or any other large changes.	Partner is site administrator. Can view all service requests for this organization. Can create service requests. Can request configuration changes.

Set an expiration date: (YYYY-MM-DD)

YYYY-MM-DD

Submit

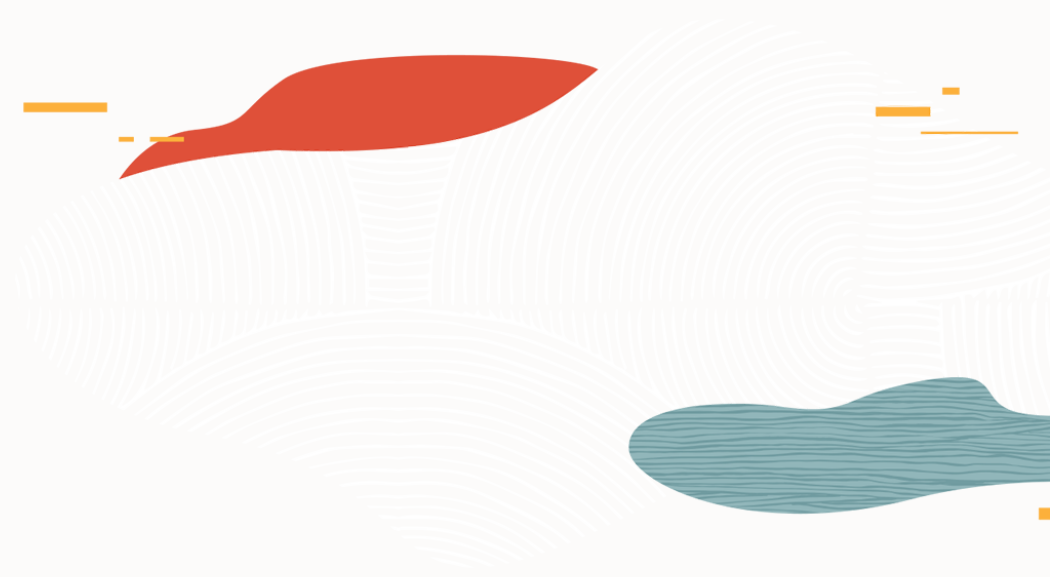


Working Effectively with Support -

Agenda

- 1 First Steps for Site Administrators
- 2 **The Support Portal**
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The Support Portal



The Support Portal – Navigation Menu



Support Learning Community Paid Services

Links found in Navigation Menu

Support

- Search the KB
- Manage and create Service Requests
- Read the Support Blog
- Manage your sites and services through the Cloud Portal

Learning

- Documentation and Product Tutorials
- Sample Code
- Streamline integrations with Accelerators
- Learn about new releases
- Watch Support Webinars
- Sharpen your skills with Cloud Learning (Launchpad)

Community

- Participate in the Discussion Forums
- Expand your Analytics knowledge with the Analytics Cookbook
- Submit an idea in the Idea Lab
- Challenge yourself in the Hero Hub

Paid Services

- Obtain Priority Support
- Get certified
- Find a consultant or partner
- Browse the Apps in the Marketplace

The Support Portal – Support Blog and Webinars

The Support Experience Blog: https://cx.rightnow.com/app/blog/support_experience

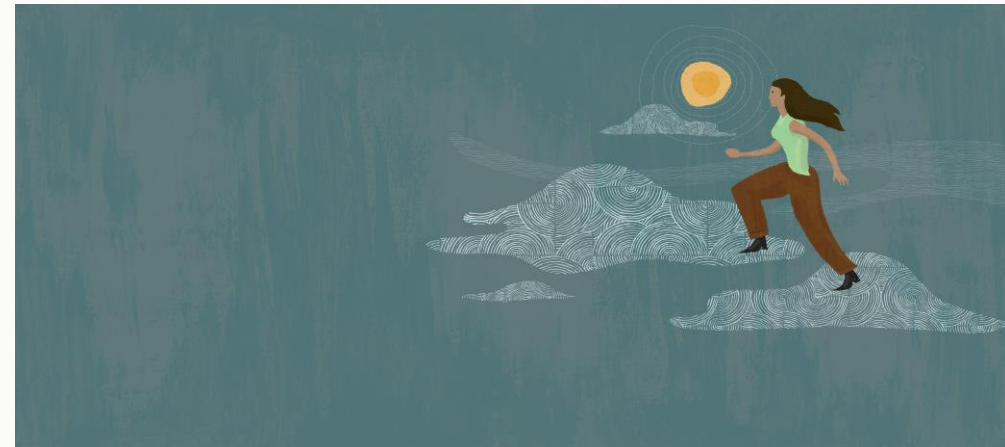
Technical Support Webinars: <https://cx.rightnow.com/app/webinars>

The Support Experience Blog

- Our blog covers best practices, commonly misunderstood product areas, trending support issues, and customer experience topics related to support organizations.
- Subscribe and stay in the know
- Accessed through the Support Menu in the Navigation bar.

Technical Support Webinars

- Technical Support Team members share their product knowledge and best practices
- All webinars are recorded and can be accessed under the Learning menu in the Navigation set



Support Learning Community Paid Services

The Support Portal – Cloud Portal

Cloud Portal: <https://cloud.oracle.com>

- Configuration Assistant self-service tool
- Create and manage (RNOW) site
- Add interfaces
- Manage mailboxes
- Enable modules
- Create/Re-create test sites
- Enable utilities

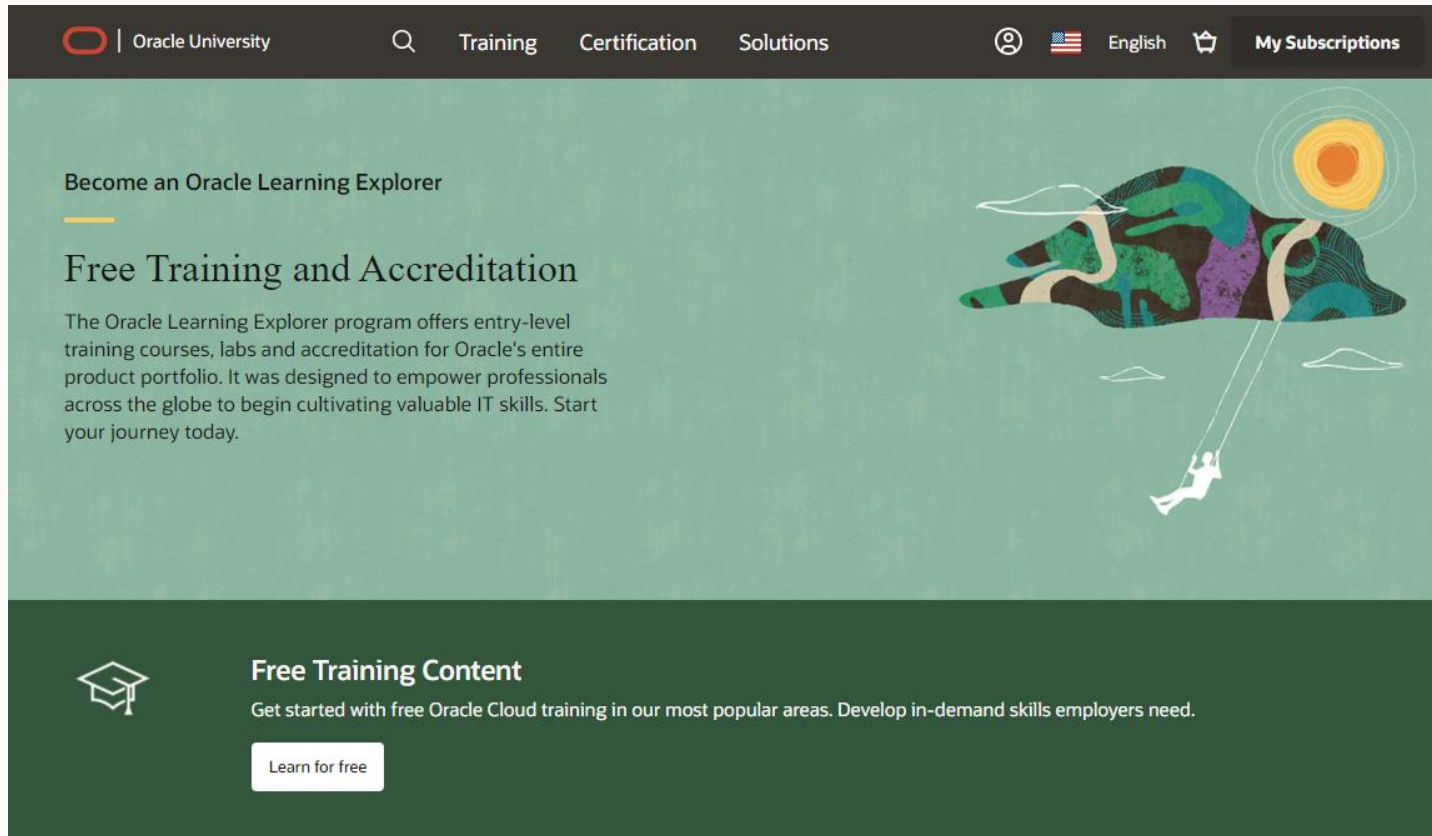
The screenshot shows the Oracle Service Cloud Configuration Assistant interface. The top navigation bar includes the Oracle logo, the title 'Service Cloud Configuration Assistant', and a user profile 'a116874.heidi.leatherby@oracle.com'. Below the navigation bar, there are tabs for 'Sites', 'SSL Certificates', 'Statistics', and 'Subscriptions'. The main content area displays the configuration for a site named 'specialforcestst'. A green oval highlights the 'Service Cloud Configuration Assistant' title in the top navigation bar. The site details include: Product: Oracle Service, Version: Oracle Service Cloud August 16, Creation Date: 2016-04-19 13:32:21, and Identity Domain: a116874. The 'Instance Overview' section shows the service status as 'Ready' and lists 1 interface. The 'Service Status' widget shows 'Ready'. The 'Interfaces' widget shows 1 interface. The 'Mailboxes' widget shows 4 mailboxes. The 'Test Sites' widget shows 2 test sites. The 'Site Details' section includes: Version: Oracle Service Cloud August 16, Subscription Id: 517589370, Creation Date: 2016-04-19 13:32:21, Product EOL Date: 2018-09-01 00:00:00, and Current Patch: [2017-01-16 18:00:43,3493,16801sp4r7,6].

More information: https://cx.rightnow.com/app/answers/detail/a_id/10711



The Support Portal – Oracle Learning Explorer

Oracle Cloud Learning through the Learning Explorer (formerly known as Launch Pad):
<https://education.oracle.com/learning-explorer>



The screenshot shows the Oracle Learning Explorer website. The top navigation bar includes the Oracle University logo, a search icon, and links for Training, Certification, and Solutions. On the right side of the navigation bar, there are icons for a user profile, the US flag, the word 'English', a shopping cart icon, and 'My Subscriptions'. The main content area has a green background with a large illustration of a person swinging on a rope towards a colorful, abstract landscape under a bright sun. The text on the page reads: 'Become an Oracle Learning Explorer', 'Free Training and Accreditation', and 'The Oracle Learning Explorer program offers entry-level training courses, labs and accreditation for Oracle's entire product portfolio. It was designed to empower professionals across the globe to begin cultivating valuable IT skills. Start your journey today.' At the bottom, there is a dark green section with a graduation cap icon, the text 'Free Training Content', and a 'Learn for free' button.

- Education on-demand for Oracle's entire product portfolio.
- Complimentary – this learning resource is included with Platinum level services
- Extensive training and best practices in a 24/7 digital learning experience
- Earn badges and bragging rights
- Advanced Learning Paths through Cloud Learning Subscriptions at Oracle University

Paid Services – Priority Level Support and the TAM Role

Includes all Features of Platinum Support plus the assignment of a Technical Account Manager (TAM)

Personalized knowledge of Customer's technical and product environments

Coordinates a virtual team of Oracle Cloud Support & Operations to resolve critical Service Requests

Delivers regular proactive support reviews to assess response against best practices



Key Benefits:

- Single Point of Contact
- Faster Response
- Reduced Resolution times
- Customer Advocacy

For further information, see:

https://cx.rightnow.com/app/answers/detail/a_id/4051

The Support Portal – My Support Experience Dashboard

The screenshot shows the Oracle Service Cloud Support dashboard. The main navigation bar includes 'Recent Activity', 'Open Service Requests', 'Open SR Profile', and 'Product Usage Profile'. Below this, there are sections for 'Incoming and Closed Volume', 'Submitted Service Requests', and 'Closed SR Analysis'. The 'My Support Experience Dashboard' tile is highlighted with a green circle. The detailed view on the right shows a pie chart titled 'Break Down of Top Service Requests by Product Over the Last 6 Months' with the following categories: Utilities (teal), Chat (orange), Reports (Analytics) (dark blue), Custom Objects / Fields (red), Feedback (yellow), and Provisioning/Entitlement (light orange).

Product Category	Color
Utilities	Teal
Chat	Orange
Reports (Analytics)	Dark Blue
Custom Objects / Fields	Red
Feedback	Yellow
Provisioning/Entitlement	Light Orange

The Dashboard is a compilation of data relating to your recent and historical SRs and agent performance.

- Monitor health of your site
- Proactively identify trending problem areas
- Organize opportunities for additional team training

For a demonstration of the Support Experience Dashboard, watch this:

https://videohub.oracle.com/media/WEWS+Support+Experience+Dashboard/1_109dttvk

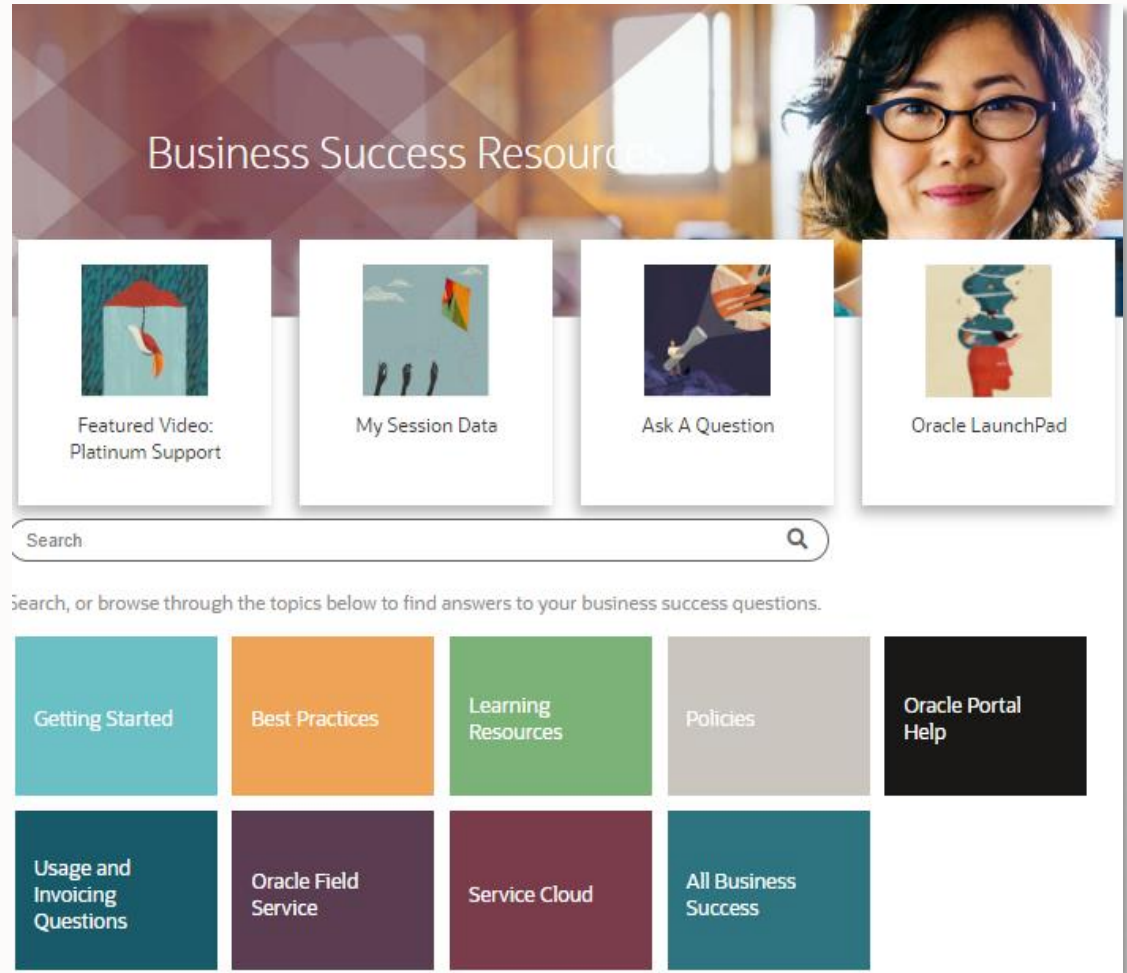


The Support Portal – Business Success Resources

<https://cx.rightnow.com/app/business/list>

Access to non-technical business support to quickly and easily find the information you need!

- New account information
- Subscription details
- Product best practices
- Usage & Analytics
- Cloud Portal Help
- Invoicing questions
- Consulting and Partners
- Sales referral



For more information, see

https://cx.rightnow.com/app/answers/detail/a_id/10617



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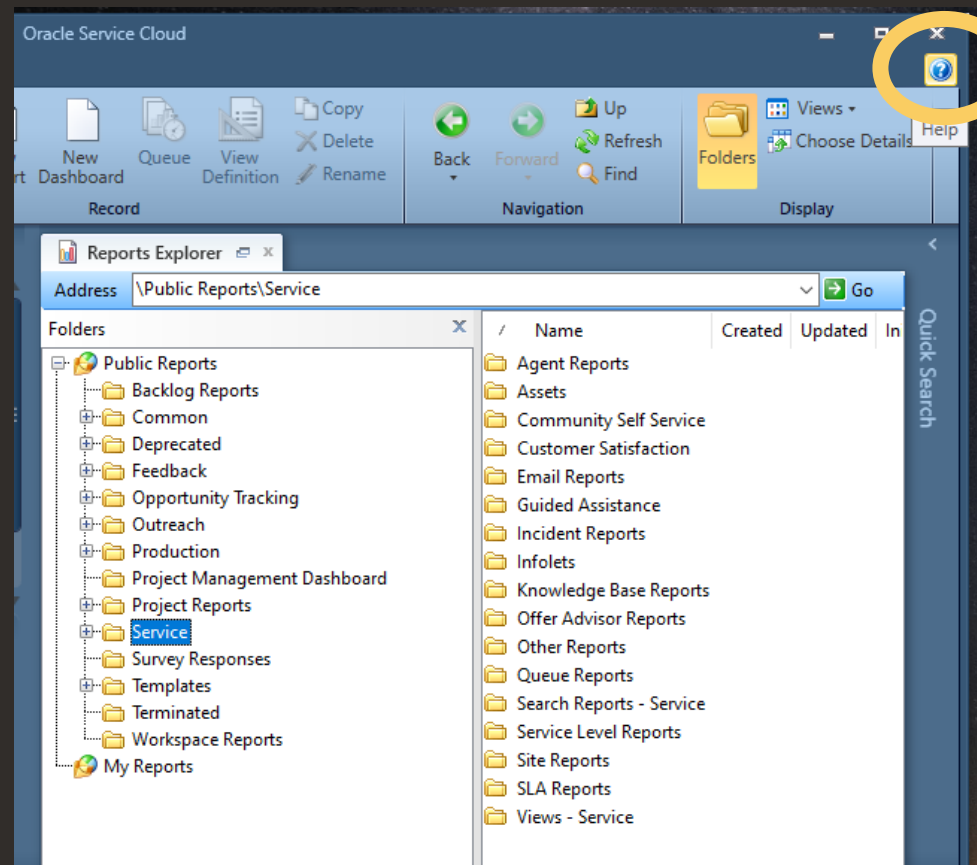
Submitting a Service Request

Did you know?

There are links to Product Documentation right in the application?

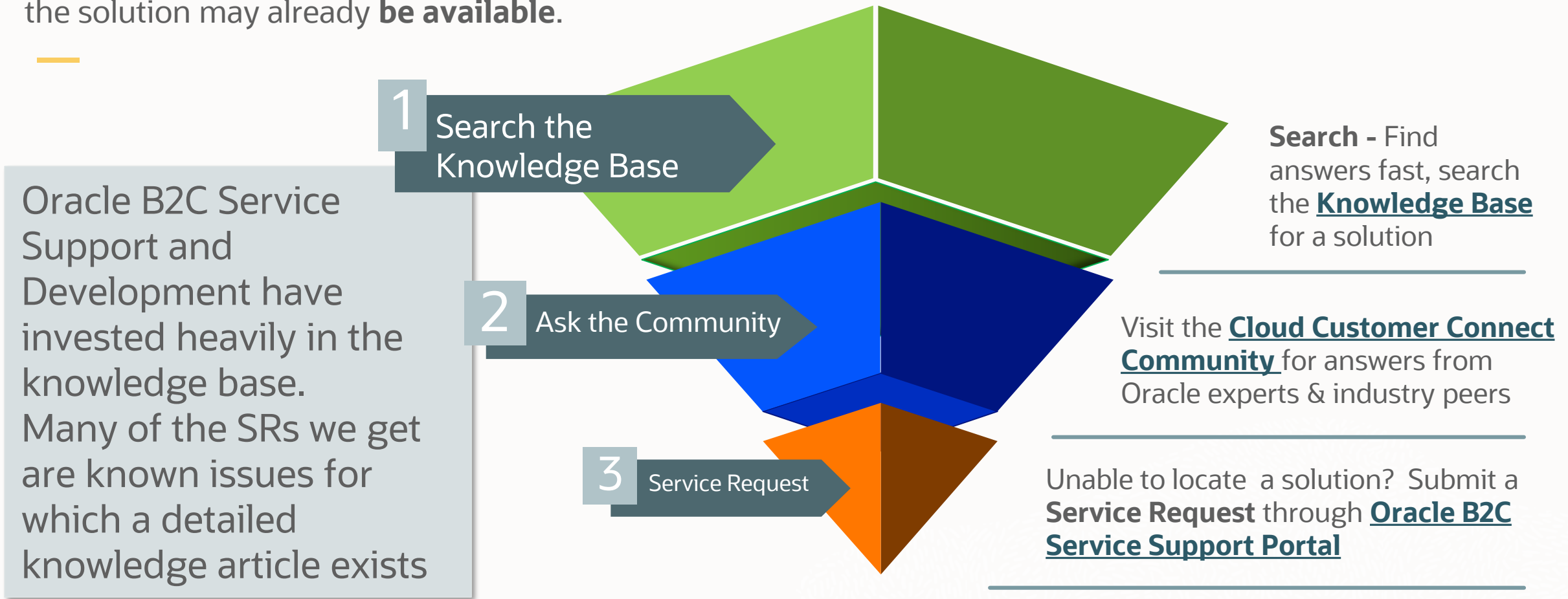
Clicking the small question mark in the corner will take you directly to the documentation for the area of the product you are viewing.

Click here to be taken to the product documentation section which covers the Reports Explorer




The Support Portal – Before Submitting a Service Request

When you have a question, need, or issue...
the solution may already be available.



The Support Portal – Searching the Knowledge Base

Search Filter:

[add a filter to a column in a report](#) 

Knowledge Base (2125)

Including an incident thread in a report

Answer: Environment: Incidents, Analytics Resolution: Incident thread data is retained in a separate table from the general incidents table. In addition, there are several different types of threads, which...

[More Knowledge Base Results](#)

Documentation (5273)

Add a Column to a Report Report Columns Add a Column to a Report You can add a report column from either the data **Last Updated:** 01/09/2020

Add Calculations to a Report Column Report Columns Add Calculations to a Report Column You can add rows to the bottom of a column to **Last Updated:** 01/09/2020

Add a Search Filter to a Report designer. Add a Search Filter to a Report Next, we will add a fixed filter to return only **Last Updated:** 01/09/2020

Add a Comparison Percentage Column to a Report Report Columns Add a Comparison Value Column to a Report You can view the same data for two **Last Updated:** 01/09/2020

Add a Trend Percentage Column to a Report Report Columns Add a Trend Value Column to a Report Trend value computed fields are similar to **Last Updated:** 01/09/2020

[More Documentation Results](#)

Community (29670)



How to add filter to filter out column with values as "No Value"
I have a requirement, for a report, I want to filter out the records with value as "No Value" in the report. I tried adding filter with "No Value", "Null", but...

Knowledge Base:

<https://cx.rightnow.com/app/answers/list>

- Your first place to search for solutions
- Results include Answers, Documentation, and Community Posts.
- Search to find answers regarding “how to” configure, customize, or create, etc.
- We pride ourselves on maintaining a robust and current knowledge base
- 90% of questions submitted can be resolved here.

Tips for Searching in the Support Portal:

https://cx.rightnow.com/app/answers/detail/a_id/1497

The Support Portal – Cloud Customer Connect Forums

Discussion Forums: <https://cloudcustomerconnect.oracle.com/groups/0b06b363f7/summary>

- Customers and partners can network and collaborate on real-life challenges, solutions, and best practices
- Obtain assistance with integrating and customizing
- Share, support, and rate comments shared by your peers
- Earn badges and points for active participation
- Vote on ideas for the product roadmap or submit your own
- Accessed through the Community Menu in the Navigation bar.

The screenshot shows the Oracle Cloud Customer Connect website. The header includes the Oracle logo, the text "Cloud Customer Connect", a search bar, the user name "cynthia mcwilliams", and a "Sign out" button. A navigation bar below the header contains links for "Forums", "Ideas", "Events", "My Stuff", "Hall of Fame", "Learning", "Success", "Documentation", and "Support". The main content area is titled "B2C Service" with the subtitle "Overview of Discussion Forums". Below this is a "Welcome to the B2C Service Discussion Forums!" section with a paragraph explaining the forums' purpose and a search prompt. A "Product Rebrand: Oracle Policy Automation is Now Intelligent Advisor" section follows. The "Forums" section contains a table with columns for "Name", "Posts", "Comments", and "Last Updated". To the right of the forums is a "Find Content" search box and a "Quick Links" section with several links.

Name	Posts	Comments	Last Updated
Agent Desktop	3987	13502	Yesterday
Communication Channels	914	3068	January 27, 2020
Customer Portal	4752	17502	10:03 AM
Desktop and UI Extensibility	807	2857	January 27, 2020
Integrations and APIs for Service	2674	10006	8:46 AM
Knowledge Management	789	2371	12:36 AM



Submitting a Service Request



Did you search the KB?

If yes, start here

Floating Links lets you:

- Submit a Service Request
- Quickly find phone numbers to contact the Support team
- View your Support Notifications
- Provide general feedback or suggestions



ORACLE

Support Learning Community Paid Services

Oracle Service Cloud Support

Submit a Service Request

Get Started with Technical Support

OSvC Technical Support Webinars

Submitting a Service Request – Best Practices for a Fast Resolution

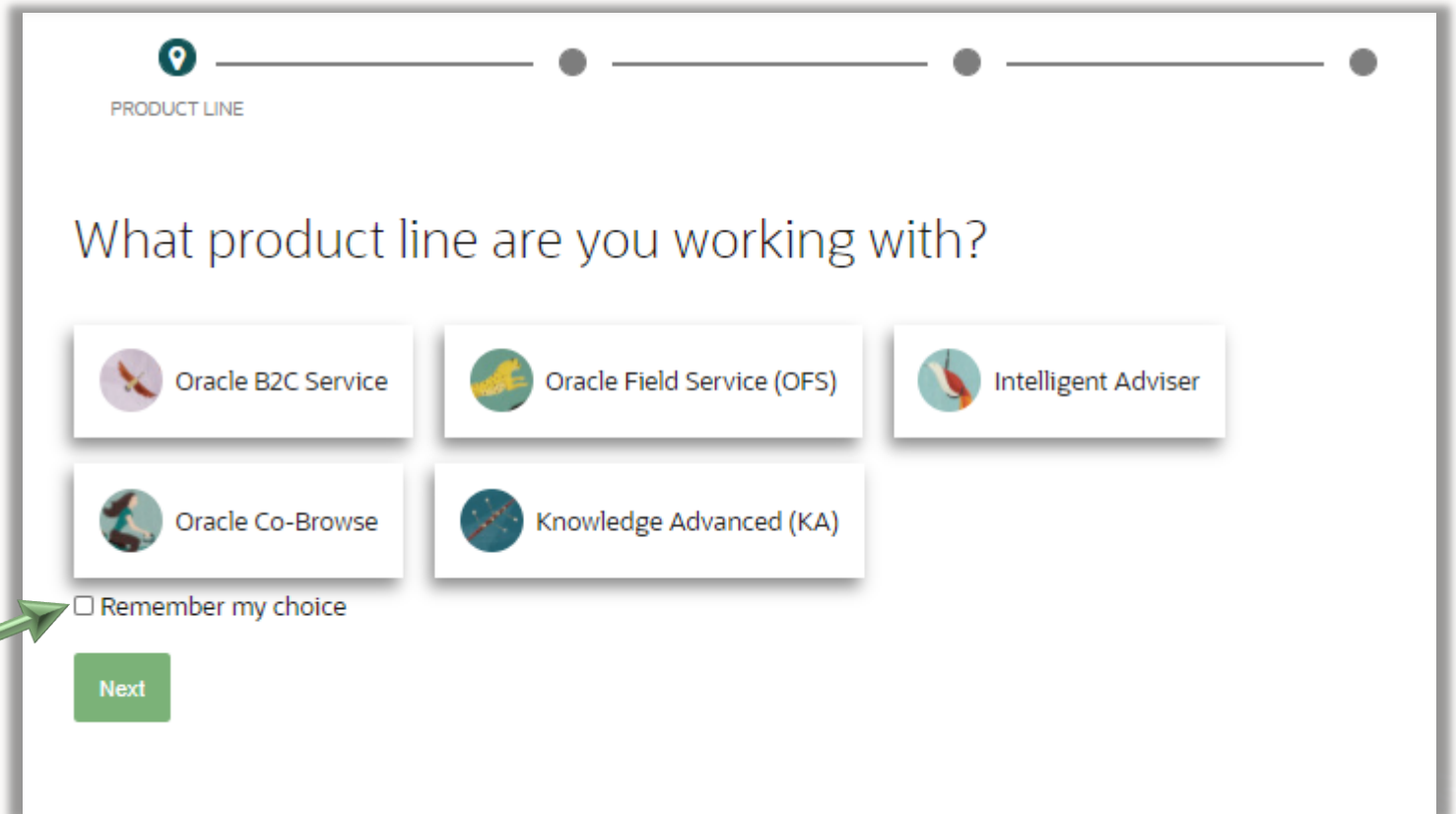
- ✓ Choose the correct product for the issue.
- ✓ Select the correct site name. (Production site, test site, etc.)
- ✓ Set the severity to correctly reflect the business impact.
- ✓ Ensure there is a Technical Contact available for severity 1 & 2 issues.
- ✓ Submit one issue per Service Request.
- ✓ Service Requests should be submitted in English or Japanese
- ✓ Include an uncropped, full-page screen shot and all error details.
- ✓ List detailed steps to reproduce the issue. Let us know if it's not reproducible or intermittent.
- ✓ An IT representative from your organization should be available to assist with troubleshooting environment issues.
- ✓ Customizations issues which are suspected of being a defect should include a Hello World example.



Submitting a Service Request – Product Line

Select the appropriate Product Line.

To set a default product line so you can skip this step in future requests, check “Remember my choice”.



The screenshot shows a web interface for submitting a service request. At the top, there is a progress indicator with four dots, the first of which is active. Below this, the text "PRODUCT LINE" is displayed. The main heading asks, "What product line are you working with?". There are five selectable options, each with a circular icon: "Oracle B2C Service" (purple icon), "Oracle Field Service (OFS)" (green icon), "Intelligent Adviser" (teal icon), "Oracle Co-Browse" (blue icon), and "Knowledge Advanced (KA)" (blue icon). Below these options is a checkbox labeled "Remember my choice". A green arrow points from the text on the left to this checkbox. At the bottom left of the form is a green "Next" button.

Submitting a Service Request – Request Type

Select the option which best describes the type of issue you are reporting.

Because our Subject Matter Experts have designed product specific submittal forms, making an accurate selection will route the SR to the hive of agents who can best assist you resulting in a quicker resolution.

PRODUCT LINE
ORACLE B2C SERVICE

REQUEST TYPE

Let's get you to the right department. What can we help you with?
Click the links in each issue type for details

- My production **site is completely down**
- I'm experiencing **slowness or latency** issues
- I'm having a problem with **reports**
- I'm having a problem with **emails or a mailbox**
- There is an issue that affects our **end user pages**
- I'm having an issue with **chats**
- I suspect a **utility** issue
- I need a **feature** enabled or disabled, **site administration** performed, or am having an issue with **Configuration**

Assistant

- An **error occurs in the agent console** (BUI or .NET)
- I need help with a **custom built tool or integration**
- I want to ask about a pending version update, or my update site
- None of the above options look relevant, I have a different question.

Next

Click on the description links for further details.

Submitting a Service Request – Service Event Notifications

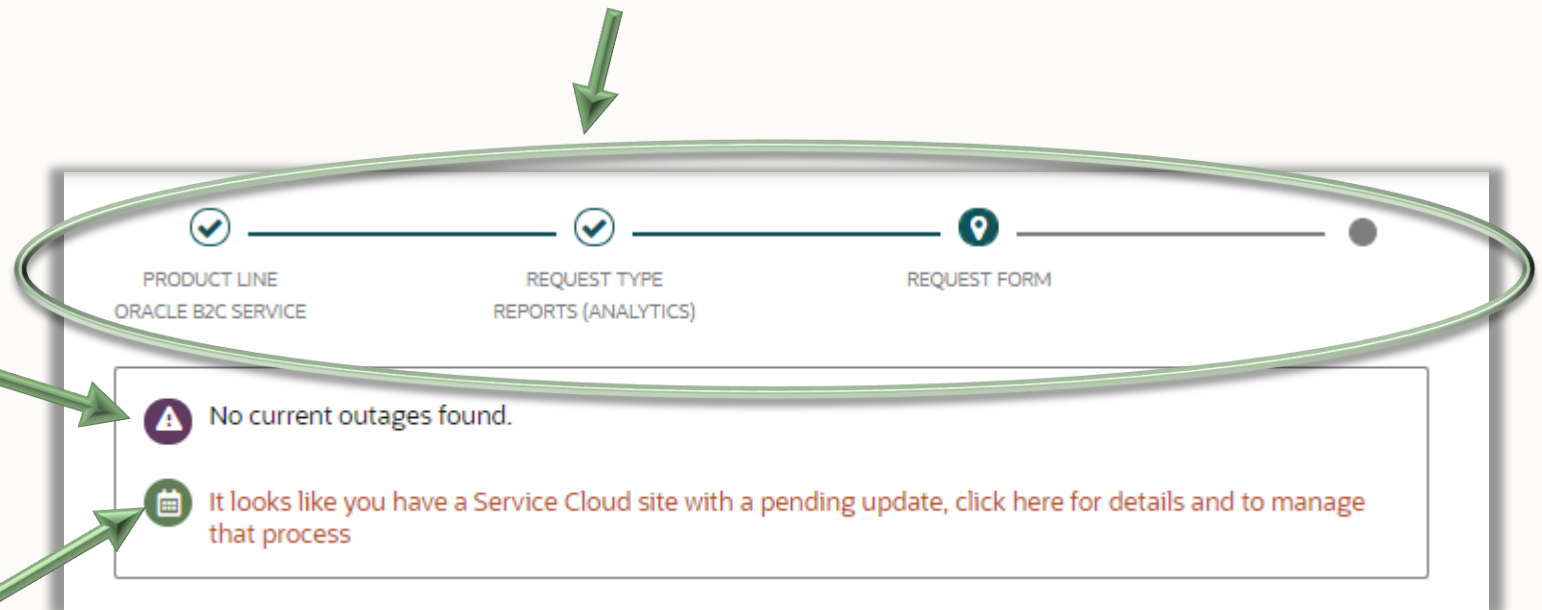
Are you submitting a severity 1 Service Request because your site is inaccessible?

If there is an active Service Event which may be affecting your site, you will see a Service Event notification. Clicking on the link will provide a one click option to create an SR during an outage.

Is your site getting ready for a B2C Service Update?

You will see a message with a link to manage that process.

Click in the breadcrumb menu to go back and change your options.



Submitting a Service Request – Form Submission

Be Detailed!

- Fields change dynamically according to the product value.
- These forms streamline the troubleshooting process by requesting information that is typically required to investigate an issue for the product you've selected.
- Providing complete and accurate responses will expedite resolution of the issue.

The screenshot shows a web form for submitting a service request. The form is titled "How impactful is the issue you are reporting? *" and contains several fields:

- A dropdown menu for "How impactful is the issue you are reporting? *" with the option "-- Please Select --".
- Two dropdown menus: "Organization for Service Request" (selected: Oracle Service Cloud Primary Support Site) and "Primary Contact" (selected: Cyndi McWilliams).
- A dropdown menu for "Site *" with the option "Please select your site".
- A text input field for "Subject *".
- A large text area for "Question *".
- A dropdown menu for "CX Client Type ?" with the option "-- Please Select --".
- A text input field for "Report Name ?".
- A text input field for "Report (Ac) ID ?".
- A text input field for "Path to report ?".

Submitting a Service Request –Environmental Issues

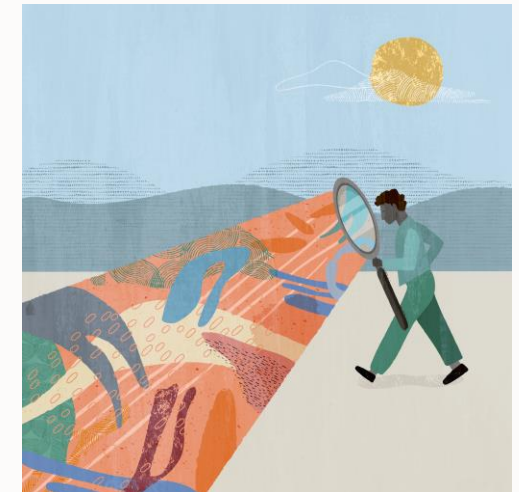
Is the cause of the issue outside the Oracle environment?

Symptoms of Environmental Issues:

- Issue only affects certain users or locations
- Issue is not reproducible outside your network
- Installation Errors
- Issue is experienced with other applications
- Downstream ISP Problems

Search the KB for tools:

- Workstation and Network Data Collector [Answer 2412](#)
- Fiddler and Wireshark (Proxy Settings) [Answer 10958](#)
- Windows Event Log (System and Application logs) [Answer 4428](#)
- DOS ping and trace route commands [Answer 2077](#)



Collaboration: Success is highly dependent upon having an IT Contact who can work with Support to provide necessary data. In addition, before submitting the SR, ensure that all system, network, and workstation requirements are met according to the **Infrastructure Requirements Guide: Answer ID 31:** https://cx.rightnow.com/app/answers/detail/a_id/31

Submitting a Service Request – Help us improve resolution time

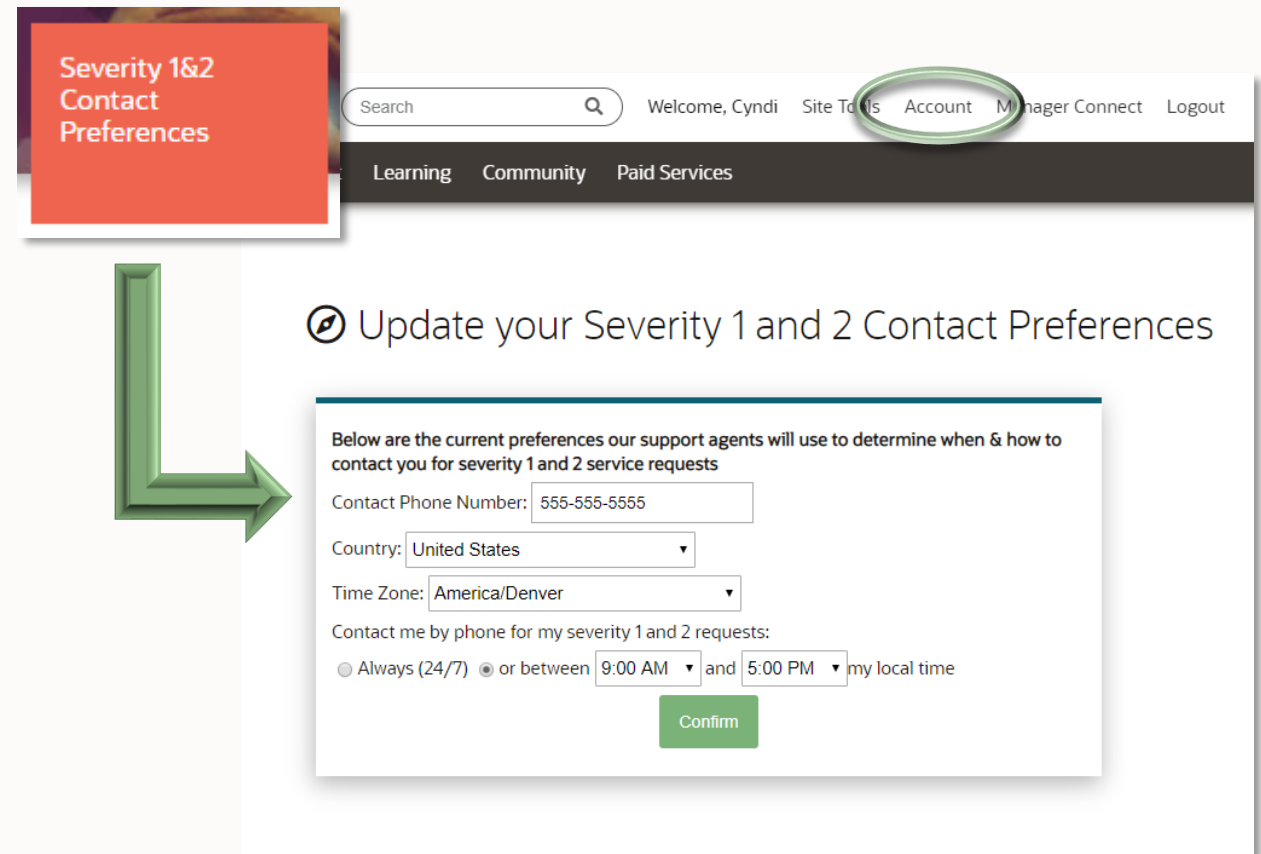
• SR Quality

- Correct product, site, and interface.
- Detailed steps to reproduce.
- Uncropped screen shot.
- Who is affected?
- Full error details
- **The more information, the better!**

• Correct Severity

- Ensure SR severity is set to align with impact to the business. For example, Product Update show-stoppers should be submitted as Sev 1.
- Do not raise the severity of an SR to escalate an issue.
- For a full description of severity levels, see: [Answer ID 971](#)

If you're submitting a Severity 1 or 2 issue, make sure your phone contact information is correct under Account > Severity 1&2 Contact Preferences



Severity 1&2 Contact Preferences

Search Welcome, Cyndi Site Tools Account Manager Connect Logout

Learning Community Paid Services

Update your Severity 1 and 2 Contact Preferences

Below are the current preferences our support agents will use to determine when & how to contact you for severity 1 and 2 service requests

Contact Phone Number: 555-555-5555

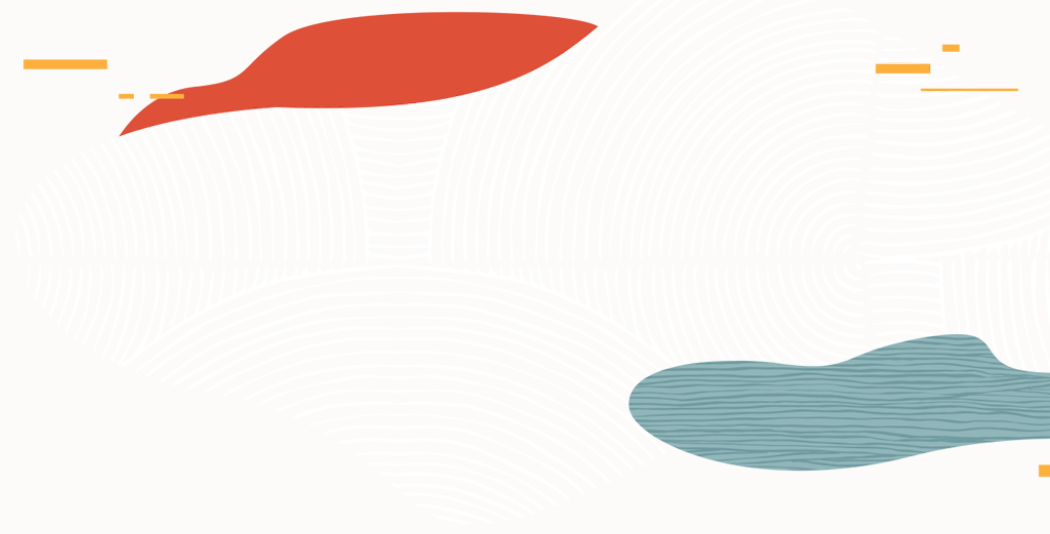
Country: United States

Time Zone: America/Denver

Contact me by phone for my severity 1 and 2 requests:

Always (24/7) or between 9:00 AM and 5:00 PM my local time

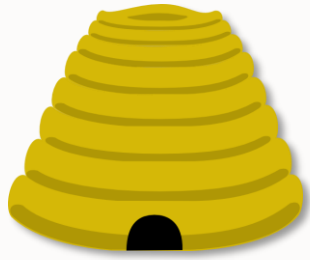
Confirm



Working with Support in a Service Request



Managing a Service Request – How are SRs assigned?



All SRs are routed to a specialized “hive” of agents based on the product you selected. An incorrectly set product may delay response and resolution times.



Severity 1 SRs are treated as “All hands on deck” and are worked continuously until the issue is resolved or a workaround is in place. Severity 1 is not to be used as a means of escalating a Service Request.

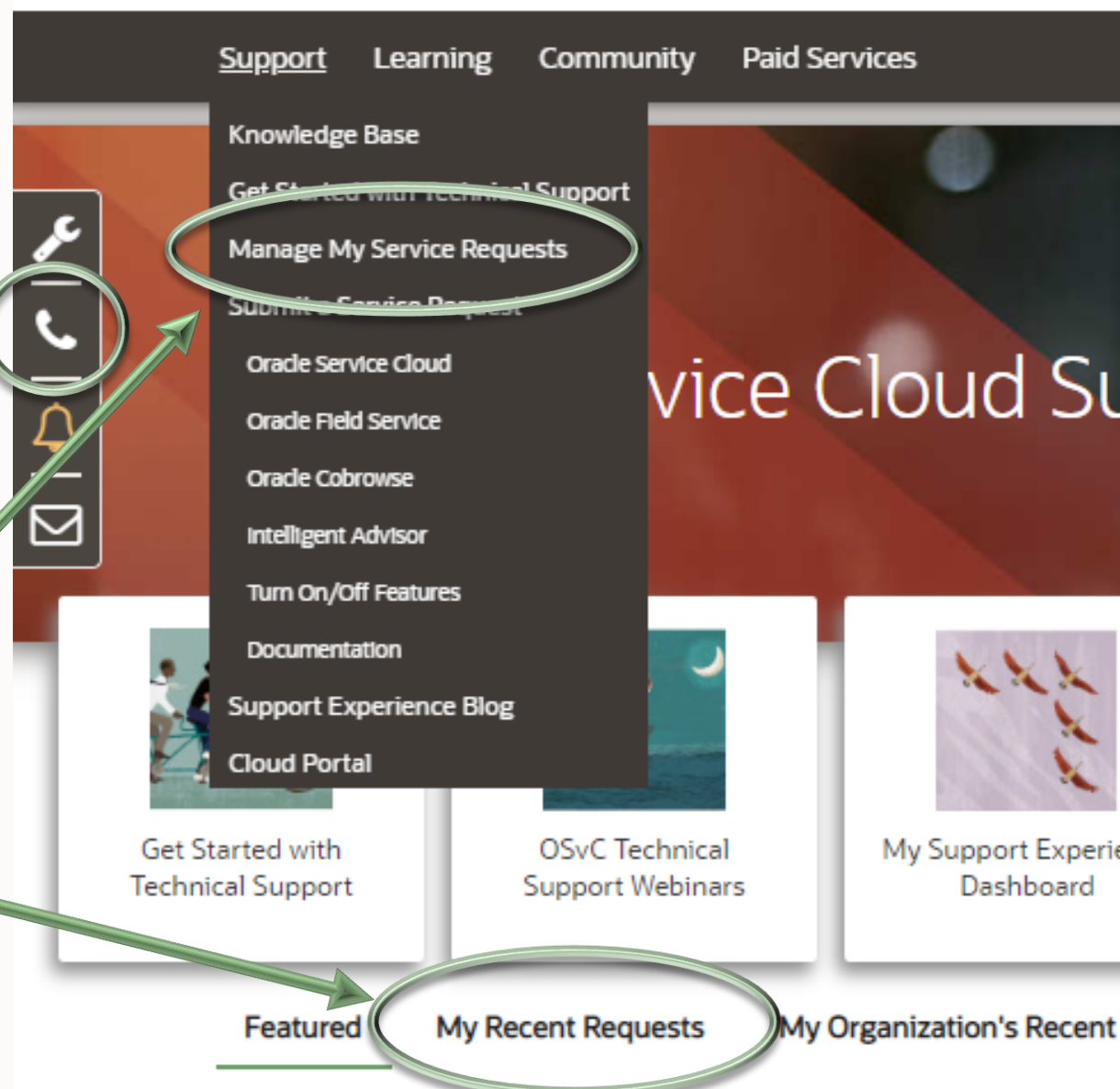


Resolution of the issue is a partnership.

Be sure to include your phone number for Severity 1 and 2 SRs. If we cannot contact you, the severity may be lowered. SRs with a Severity 2-4 can expect a response within the customer’s local time, 9-5.

Multiple Channels to Contact Support in reference to a Service Request






- Phone
- Support Portal
 - Manage My Service Requests
 - My Recent Requests
- Email
- Chat (when certain conditions apply)




Managing a Service Request – Managing Your SR

- Monitor changes in SR status
- Documentation is essential
 - Minimize Service Request ‘tag’ or ‘pinging’ by ensuring you provide information requested or an explanation of why it may not be possible to provide
- Request phone calls where appropriate
- Request collaborative screen-sharing support sessions as appropriate
- You should change the severity level when it becomes appropriate
- Engage Support management, if needed

Update this service request

 Need help working with Support? Check out our Working Effectively with Support Tutorials
Oracle Field Service ( PDF |  Video) Oracle
Service Cloud ( PDF |  Video)

This Issue is Resolved 

Add additional information to your service request *


I have attached a full page screenshot of the error I received today.

Current Severity - if changing provide reason in above text area *

2 - Major Functionality Impairment

Attach additional documents to your question


No file chosen

 closed SRs.png [Remove](#)

cc

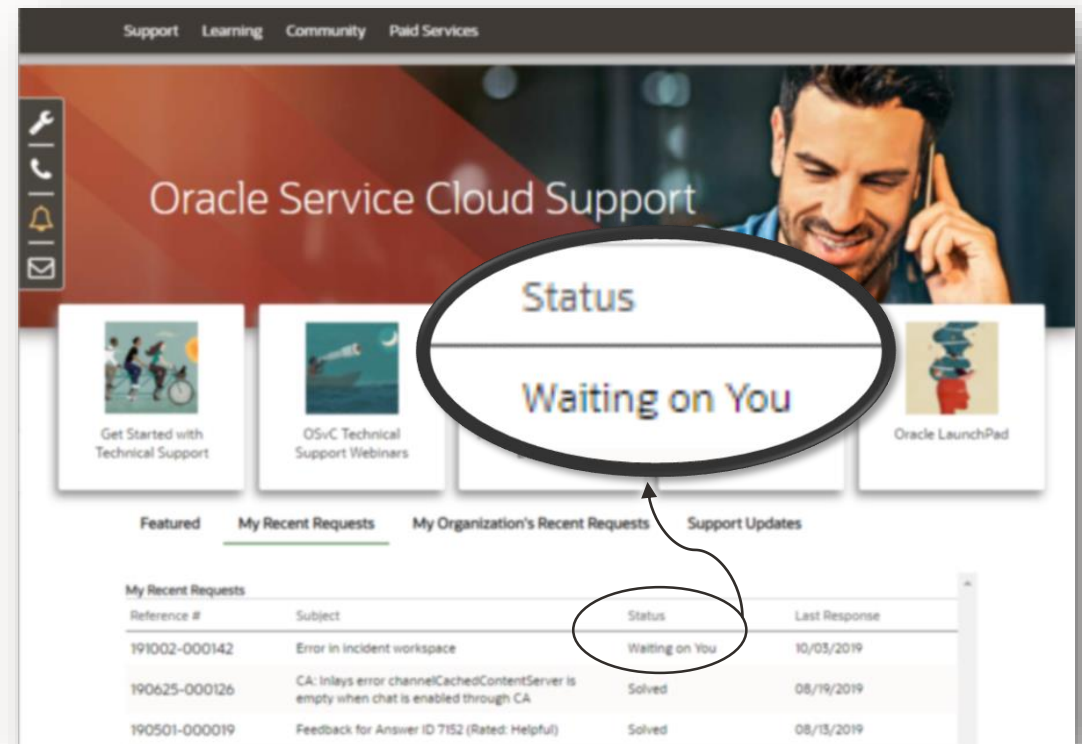


Managing a Service Request – Status Descriptions

SR Status	Description
Waiting 	Oracle Support is waiting for you to update the Service Request.
Unresolved	Oracle Support is working the Service Request.
Solved	The SR is closed and is no longer being worked on.

Waiting Status: The Support agent cannot proceed with the investigation into the issue without additional information from you.

If you take an extended period of time to respond or provide information it sends the Support Engineer an implicit message about the problem urgency which may not match the Service Request priority.



Managing a Service Request – Agent Expectations

Support agents will:

- ✓ Be rigorously trained and certified
- ✓ Test your issue in a clone environment when possible so as not to affect your production environment
- ✓ Only access your data when absolutely necessary
- ✓ Be in accordance with privacy laws.

See:

[Oracle Privacy Policy](#)

[KB 9433 Data Privacy FAQ](#)

Support agents will not:

- ✗ Request that a contact be created for them for troubleshooting purposes.
- ✗ Update customer data
- ✗ Maintain your site as administrator
- ✗ Control data hosted in a non-Oracle facility
- ✗ Control customer's access to data
- ✗ Maintain your customizations

Managing a Service Request – SR Handling Processes



Security Related Issues

- All communications must be approved by Security team



Service Exception Reports

- Root cause analysis of Service Outages
- Service transparency
- See [Answer ID 2591](#)



Product Defects

- Resolution delivered through Maintenance Pack.
- Maintenance Pack contents are documented in [Answer ID 9013](#)



Product Enhancements

- Customers can request product enhancements
- Suggest and vote on product ideas through the [Idea Lab](#)

When to engage Support Management

- Communicate an important business issue to Support management
- Report a critical showstopper to implementation or upgrade plan
- Express dissatisfaction with the resolution or response to an SR



Managing a Service Request – Closing a Service Request



- Support agents will attempt to confirm issue is resolved before closing an SR
- SR may also be auto-closed after 3 requests for more information without a customer response
- SR can be re-opened within 30 days
- **Reopen rates are very low. We measure this to ensure that we are not closing issues prematurely.**

Working Effectively with Support -

Agenda

- 1 First Steps for Site Administrators
- 2 The Support Portal
- 3 Engaging Support Through Service Requests
- 4 **B2C Service Updates**
- 5 Customizing Your Site
- 6 Additional Resources

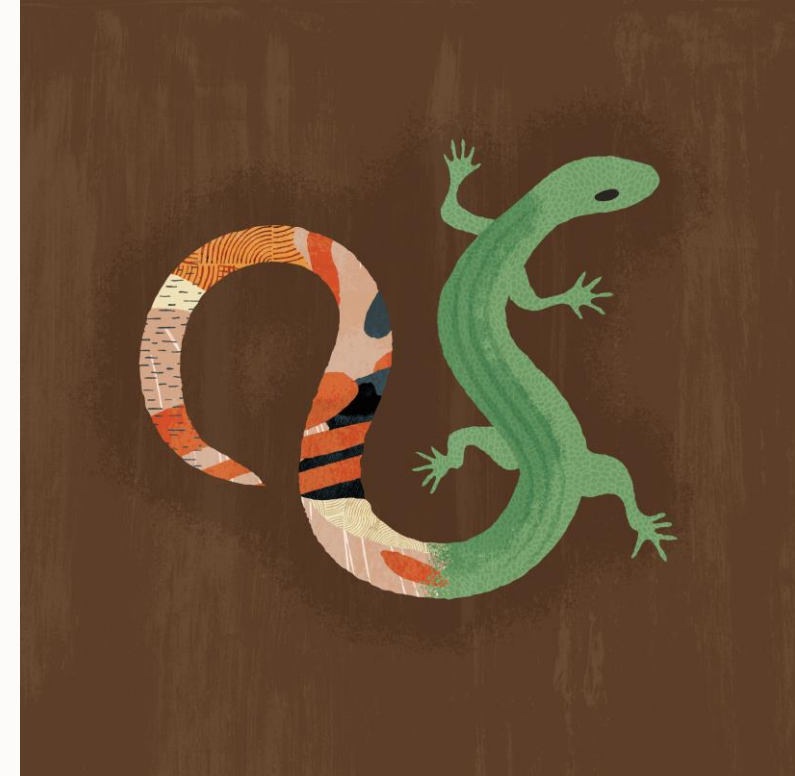
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B2C Service Updates

Working Effectively with Support – Product Updates

Auto Update Program

- Updates allow you to stay current on B2C Service features and functionality.
- Product releases occur four times a year: February (A), May (B), August (C) and November (D).
- Automated updates streamline the update experience so you don't have to spend your time engaging in lengthy update processes.
- All new sites are automatically enrolled



For more information on the Auto Update Program, please visit:

https://cx.rightnow.com/app/answers/detail/a_id/6409

Working Effectively with Support – End of Life (EOL) Policy

Purchased before June 1, 2017	Purchased after June 1, 2017
Support period is 8 releases/24 month	Support period is 5 releases/15 months

- Oracle will not apply development resources to support versions that have reached EOL.
- Service Level Targets (SLTs) are not serviced while the customer remains on an EOL version. Support will be offered as best effort on SRs submitted
- Defect remediation will only occur on supported versions
- Infrastructure changes are not regression tested against EOL versions and may result in impact to the site. As a practice, Oracle will not roll back infrastructure changes which result in product stability or operability issues due to EOL versions

See further details on the Software Lifecycle Policy:
https://cx.rightnow.com/app/answers/detail/a_id/749

Working Effectively with Support – Additional Updates

Single Version Services

Updated Automatically with
No User Impact

- **Browser User Interface (BUI)** Continuous Delivery Schedule. See [Answer ID 8598](#) for current details



- **Chat** Quarterly Update Schedule. See [Answer ID 5127](#) for current details



Maintenance Packs

- Lightweight background process which requires no involvement from your IS team
- Deliver functionality improvements and defect remediation
- Seamless: No impact to active users
- See these answers for current schedule and content details:

[Answer ID 9013: Maintenance Packs](#)

[Answer ID 7223: Patches](#)

[Answer ID 7224: Untested Patches](#)

Working Effectively with Support – Deprecations

- **Functionality that is being phased out**
- **Often replaced with better functionality**
- **Limited Support**
- **Many deprecations, such as Customer Portal, require your action!**

See [Answer ID 2678: Customer Portal Migrations and the Customer Portal Discussion Forum](#)

Answer ID 5974

In-Progress Deprecations

These features are within the 2-year deprecation period and will be removed in a future release. You should begin migration efforts to the replacement technology/feature as soon as possible.

Deprecation Release and Feature Area

Deprecation Begins	Feature Area	Additional Information
August 2019	Customer Portal	Customer Portal 3.3, 3.4 and 3.5 have been deprecated as of August 2019
August 2017	Social	Oracle Service Cloud Social Monitor deprecation begins of August 2017
August 2017	Outreach	Oracle Service Cloud Offer Advisor deprecation begins as of August 2017
May 2017	Mobile Agent App	Oracle Service Cloud Mobile Agent App (TAP) is deprecated as of May 2017
May 2016	Customer Portal	Deprecation period begins for Version 3.0, 3.1, 3.2 of Customer Portal Note: Although CPv2 and CPv3.X have been deprecated, no version of CP has been scheduled for removal yet.
August 2015	Community	Oracle Service Cloud Community deprecation begins August 31, 2015
November 2014	Cobrowse	Deprecation of Cobrowse Version 1 and Link Widgets - CP2, CP3.0 and CP 3.1
November 2012	Customer Portal	Deprecation period begins for Version 2 of Customer Portal
February 2012	CCOM	Deprecation period begins for Version 1.1 of Connect Common Object Model (CCOM)



Working Effectively with Support -

Agenda

- 1 First Steps for Site Administrators
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- 4 B2C Service Updates
- 5 **Customizing Your Site**
- 6 Additional Resources

Things to Keep in Mind if You Plan to Customize Your Site

Customization Considerations

What should you keep in mind if you want to customize your site?

Data Limitations:

- **Scalability – Oracle B2C Service is a transactional database and is not intended to be a warehouse for large data sets**
- **MySQL limitations – customizations that do large table scans or joins will negatively impact your site's performance**
- **Hard limits exist for some standard objects and custom fields**

Responsibilities of Customer/Partner who wrote the code:

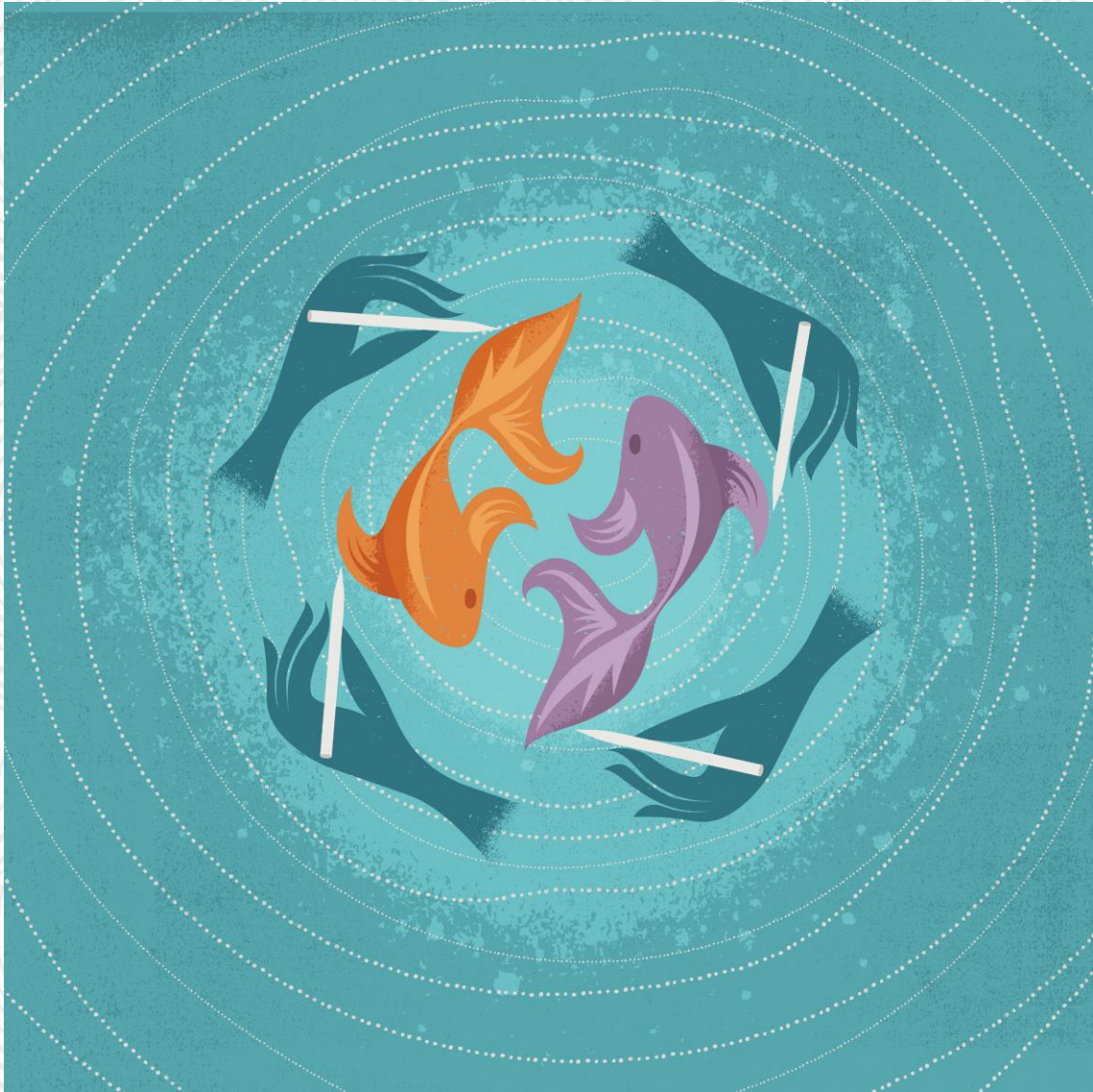
- **Full testing for intended functionality**
- **Confirm no code issues exist**
- **Logging and tracing – Oracle does not log your customizations**
- **Regular updates to supported versions**
- **Periodic purging of historical data**

For more information, see: https://cx.rightnow.com/app/answers/detail/a_id/9715

Customization Support – Service Request Requirements

If you suspect a product defect, what will you need to provide?

- Your customization logs which include an occurrence of the issue
- Your customization logs which confirm that other systems are responding as expected and the Oracle code is failing
- FiddlerCap showing the query and the returned results (For example, with CTI Integrations)
- Your code including the section where the problem is occurring
- If a partner provided the customizations as part of their consulting fee and ongoing support of the customization they should have written logs of the customization and be able to troubleshoot those failures and fix them unless they can show in the log that Oracle is the issue.
- A “Hello World” example demonstrating the product defect. (See [Answer ID 6925](#))



Additional Resources are available to help you customize your site:

- Oracle Consulting Services
 - [Answer ID 10745](#)
 - [Answer ID 8723](#)
- Oracle Partner Network
 - [Answer ID 9719](#)
- Development Resources
 - [Oracle B2C Communities](#)
 - [Technical Documentation & Sample Code](#)
 - [Accelerators](#)

Working Effectively with Support -

Agenda

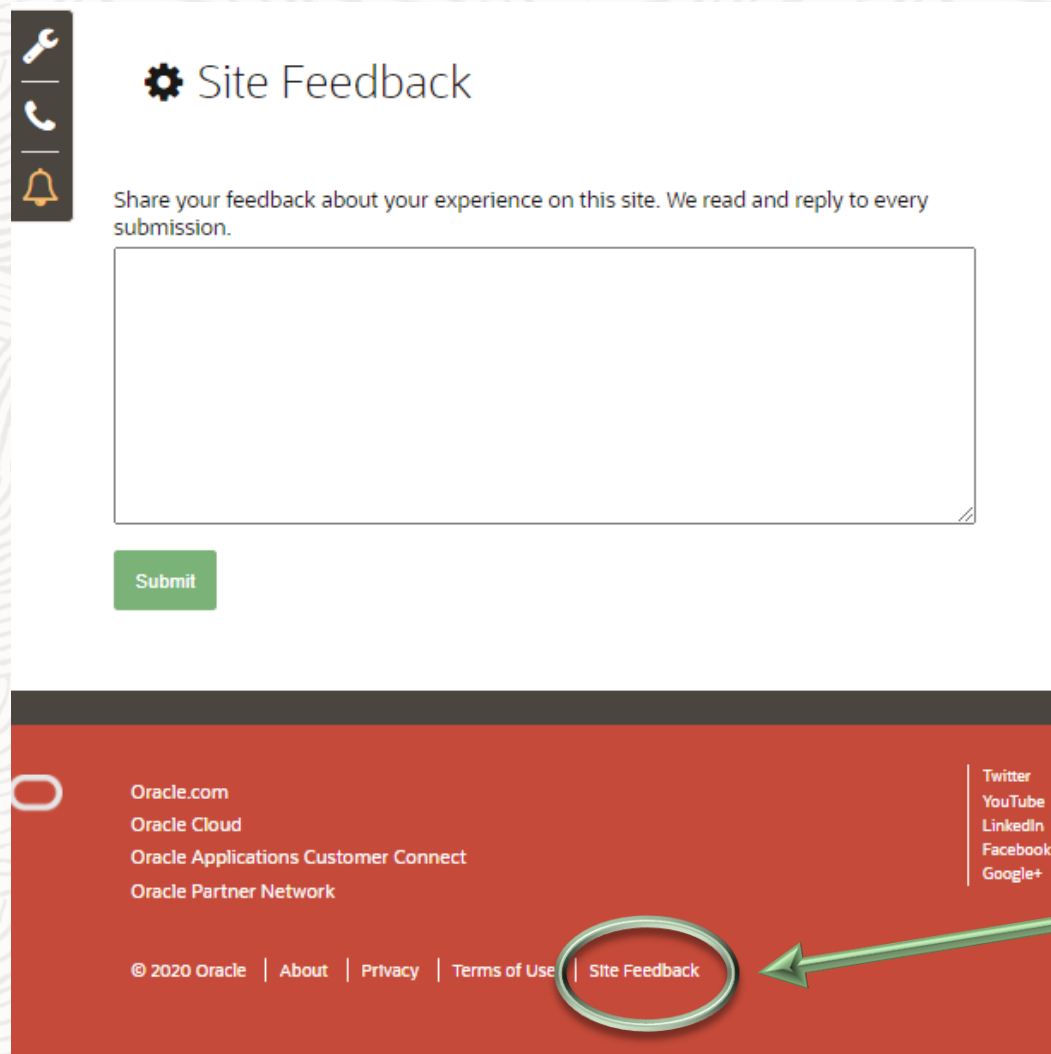
- 1 First Steps for Site Administrators
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- 6 **Additional Resources**

Working Effectively With Support – Additional Resources



- [Oracle Contracts](#)
- [Oracle Products & Services](#)
- [Oracle University](#)
- [Oracle Support Policies](#)
- [Cloud Hosting & Delivery Policies](#)
- [Accessibility and Oracle](#)
- [Upcoming Oracle Events](#)

Working Effectively with Support – Site Feedback



The screenshot shows the Oracle Site Feedback form. On the left, there is a vertical navigation bar with icons for a wrench, a telephone, and a bell. The main heading is "Site Feedback" with a gear icon. Below the heading is a text prompt: "Share your feedback about your experience on this site. We read and reply to every submission." This is followed by a large, empty text input box. At the bottom left of the form is a green "Submit" button. The footer of the page is dark red and contains the Oracle logo, a list of Oracle products (Oracle.com, Oracle Cloud, Oracle Applications Customer Connect, Oracle Partner Network), a list of social media links (Twitter, YouTube, LinkedIn, Facebook, Google+), and a row of links: "© 2020 Oracle | About | Privacy | Terms of Use | Site Feedback". The "Site Feedback" link is circled in green, and a green arrow points from the right towards it.



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