Create a Case Record

At A Glance

Case Management Process

Log a Case → Categorize a Case → Investigate and Diagnose → Resolve and Recover → Validate and Close

Create a Case

Purpose

A Case is created to:

- Document all information and the history of the Case from registration to closure;
- Request clear prioritization for proper diligence to facilitate swift and effective resolution.

Best Practice for Handling Cases with Multiple Issues

Each Case record should only contain one issue. If a Case has multiple issues reported, split the Case into individual Cases with each reporting only one issue.

More information can be found here

1. Create a Case on Behalf of Customer

Option A: Create a Case in NOW system

1a Navigate to Case Module

1b Fill in mandatory information based on information provided by the customer

1c Save the Case record.

Option B: Create Case in SAP ONE Support Launchpad

1a Navigate to SAP ONE Support Launchpad

1b Fill in mandatory information based on information provided by the customer

1c Submit the record

Notes

A Case can also be created by the customer via the channels below:

- SAP One Support Launchpad
- Expert Chat
- Emails
- Schedule an Expert (SaE)
- Global Support Customer Interaction Center (CIC)
- Build-In Support (CoPilot) direct from the customer application
- Solution Manager

More information can be found here

1. Create a Case Record

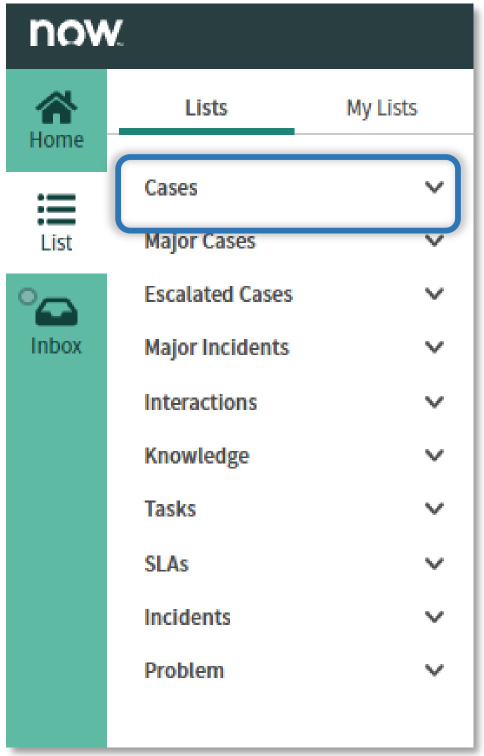
Case Management

Option A: Create a Case in NOW system

1a Navigate to Case Module

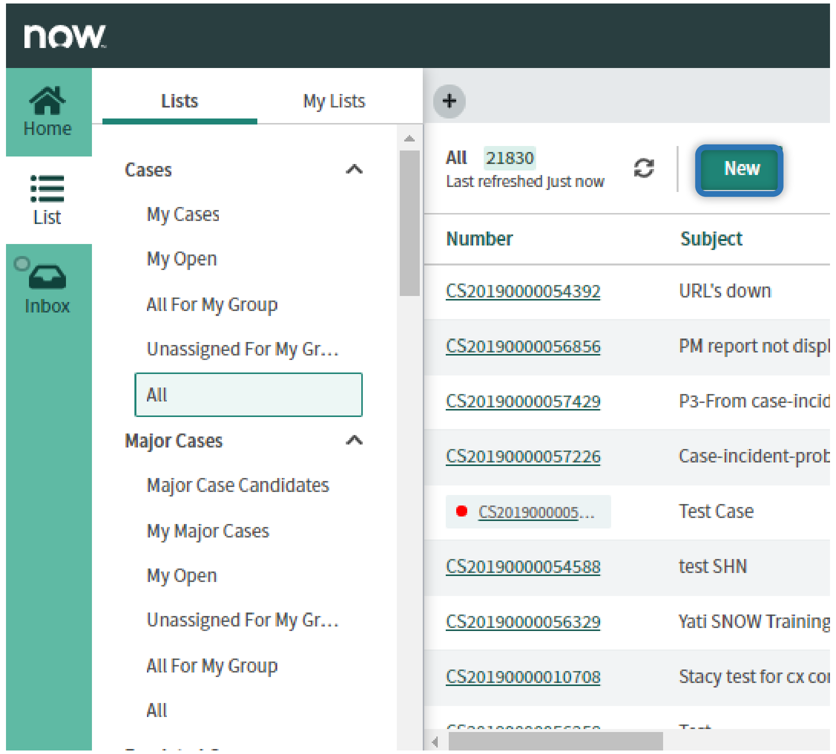
Step 1

From Agent workspace, open the List Menu and expand the Cases



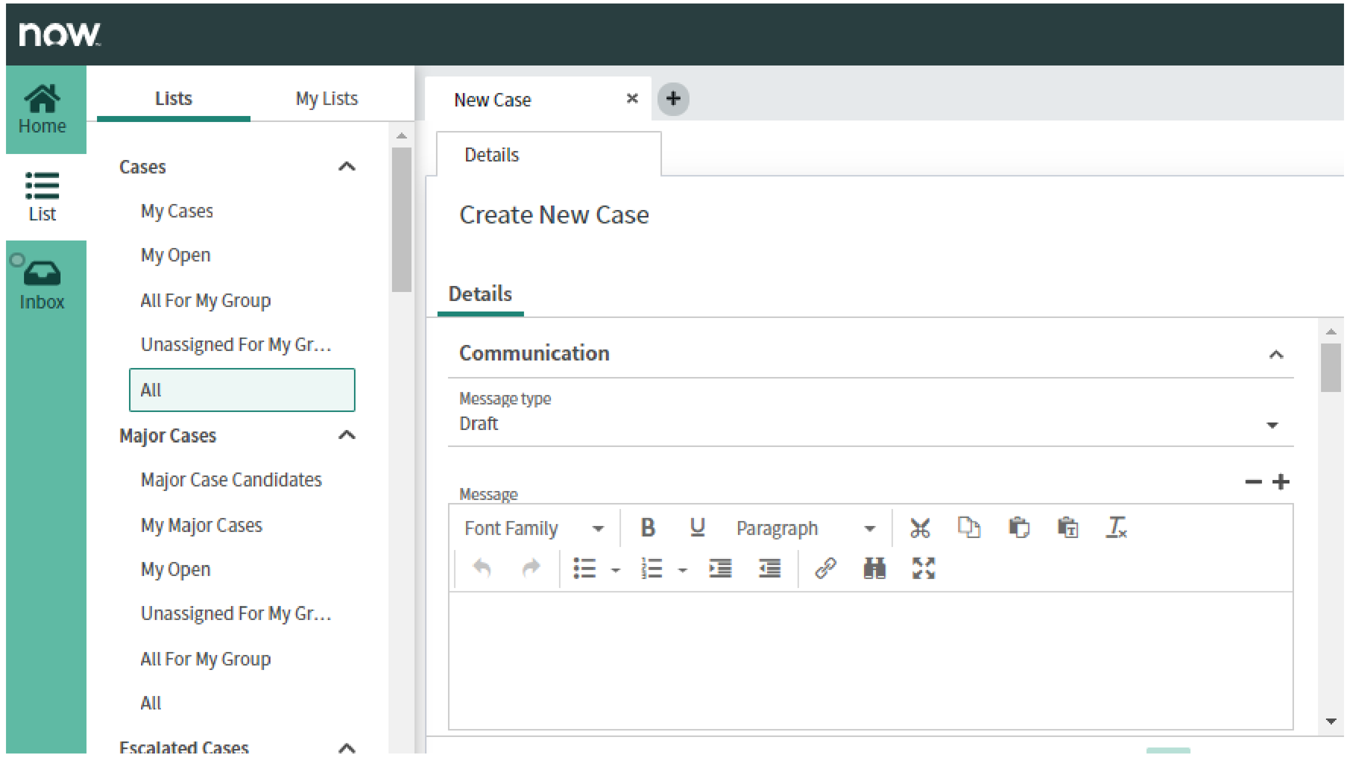
Step 2

Select one of the Case Lists and click on NEW



Step 3

A new blank Case form will open



Notes

From any of the Lists (My Cases, My open, All For My Group and ALL) a Case can be created.

1. Create a Case Record

Case Management

Option A: Create a Case in NOW system

2a Fill in mandatory information based on information provided by the customer

Step 1

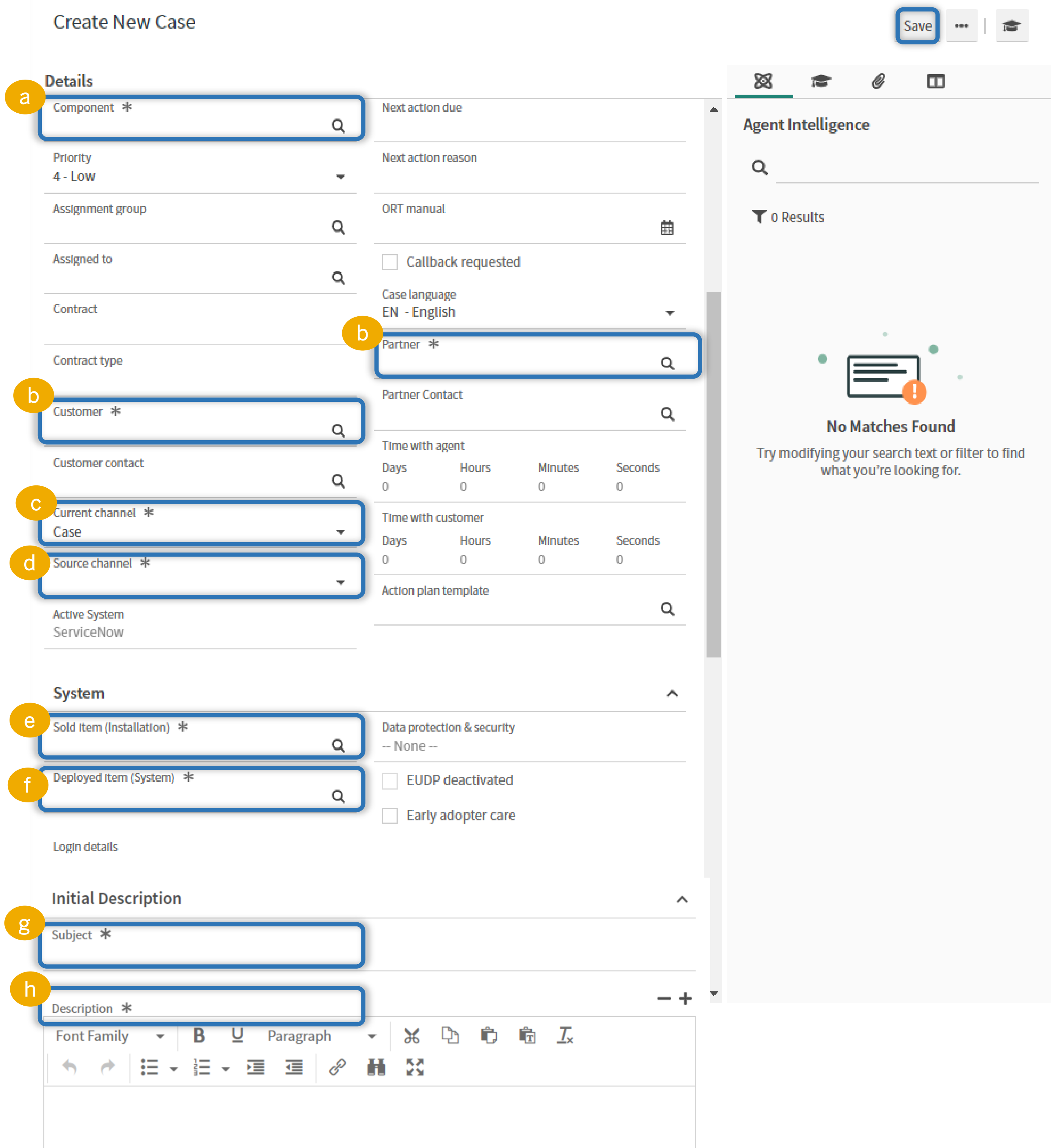
Fill in the mandatory fields in the newly created Case record to provide all necessary details to the Case Processor

The following fields are mandatory

a. **Component**
b. **Customer or Partner (more details)**
c. **Current Channel**
d. **Source Channel**
e. **Sold item**
f. **Deployed item**
g. **Subject**
h. **Description**

Step 2

Click **Save** to create the Case. The Case record number will be displayed



Notes

Customer or Partner Field

Either the Customer or Partner field needs to be filled in.

Deployed Items

Deployed Item is dependent on the value selected for Sold Item. Both are dependent on the customer that is selected.

Source Channel

Source Channel is the original channel where the case is created or triggered. It can be automatically populated depending on the contact method.

Current Channel

Current Channel is the channel via which the case is currently being handled.

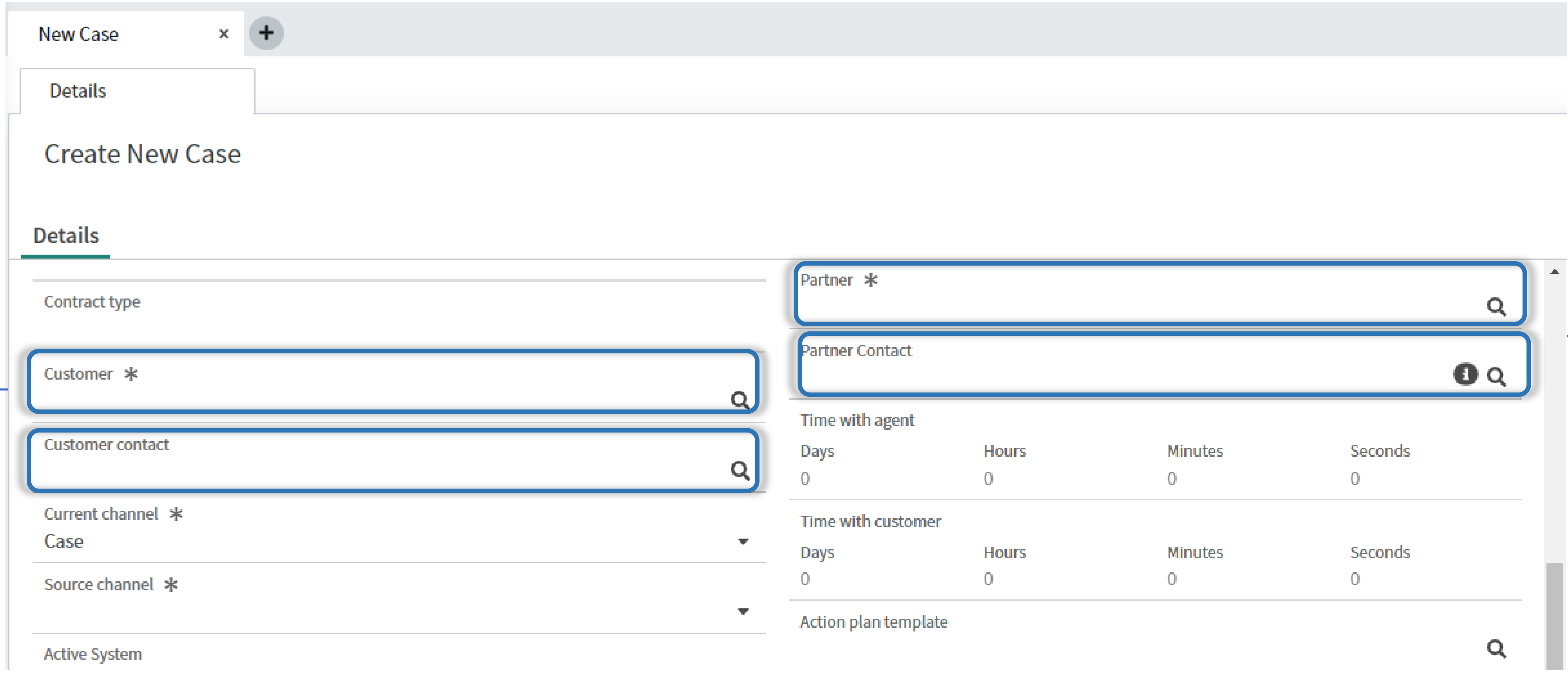
1. Create a Case Record

Case Management

b. Customer or Partner

It is the information of a contact person who will be the contact for this case must be filled

Either the Customer or Partner field needs to be populated



Customer is the name of the contact's company

Customer Contact is the customer point of contact at the account for this case

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Partner is the designated account who sell to other customers Partners can be customers themselves or manage cases from other customers

Partner Contact is the person representing the partner for this case

Notes

When the Customer Contact field is populated, the Customer field can be automatically populate based on the customer details

Notes

Click the reference icon to preview the record.

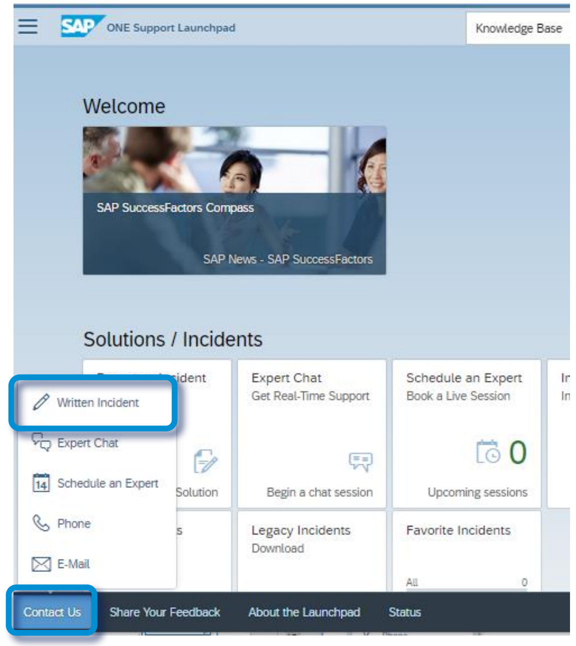
1. Create a Case Record

Case Management

Option B: Create a Case on behalf of a customer in SAP ONE Support Launchpad

1a Navigate to Case Module

In SAP ONE Support Launchpad, click on ‚Contact Us' and select ‚Written Incident'



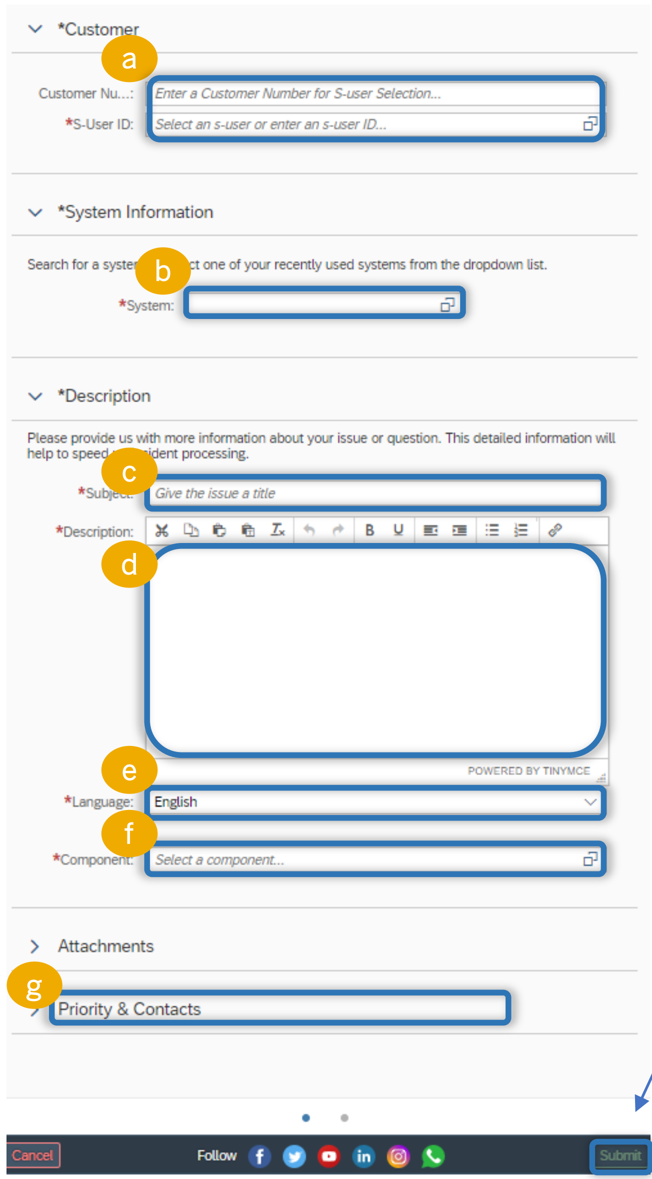
Notes

The record created in SAP ONE Support Launchpad is named as **Incident**. Pay attention to the naming difference when communicating to the customers.

1b Fill in mandatory information based on information provided by the customer

Mandatory fields are :

a. **Customer Number and/or S-User ID**
b. **System Information**
c. **Subject**
d. **Description**
e. **Language**
f. **Component**
g. **Priority**



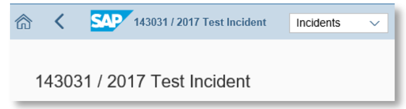
Notes

Attachments can be easily added by drag & drop. As not all file types are supported, review the attachment file types list by clicking in the provided link under Attachment tab.

1c Submit the record

Click Submit to finalize the record .

Record number will be automatically displayed.



Change Log

Secondary title if needed

What is a change log?
What you are reading is official SAP process documentation. Stringent version control is required for Compliance purposes. Thus, this **change log** is a record of who made what changes to this content & when, in case further follow up is needed.

Please send any questions or concerns to

Blanca Serrano, Madrid
Process Manager

Change Log

Version	Changed by	Date	Description of changes	Status
1.0.0	Melinda Ludanyi	June 13, 2019	▪ WIPS 4.0 initial document	Draft
2.0.0	Nádia Xavier	Oct 31, 2019	▪ WIPS 4.0 Golden Standard Baseline Document	Released