

CUSTOMER SUCCESS

Working with support:
A step-by-step case management guide



Click on each image for a guided explanation

STEP

1

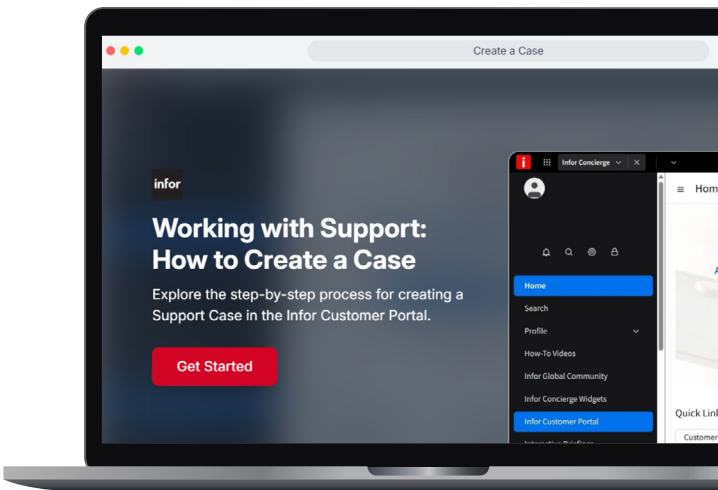
Submit a case



Use the Customer Portal

Submit a support case for product-related questions or issues or use a Customer Care Inquiry for assistance with portal access, account support, or licensing requests. A proper case must include:

- Customer and contact details: Name, email, phone number
- Priority level: Based on accurate business impact
- Case details: Error information, reproducibility steps, frequency, and screenshots/logs
- Business impact: Affected users, devices, and critical timelines



CLICK HERE



Assign priority based on business impact

Choose a priority level that reflects the urgency and business impact of the issue.

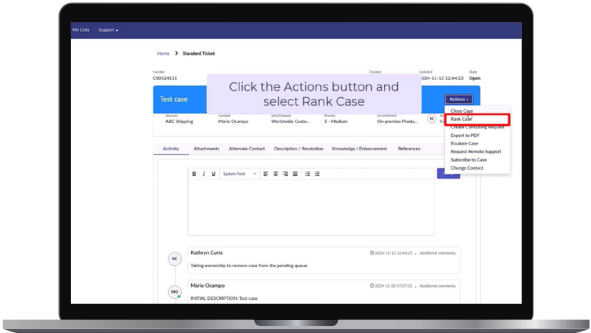
PRIORITY LEVEL	DESCRIPTION	DEFINITION
1	Critical	Service is unavailable for all users in production or a critical business process in production has halted with no acceptable workarounds
2	Major	Service is severely impaired, causing disruption to important business processes and there is no acceptable workaround
3	Medium	Service is partially impaired. There is disruption to important business processes but there is an acceptable short-term workaround
4	Standard	Service is fully operational but there are questions regarding the functionality of the Software
5	Enhancement Request	A minor issue or General Inquiry, or a suggestion is made for enhancing the Software by adding new features or improving existing features

CLICK HERE



Enable ranking and rank incidents

Use ranking to provide input that supports prioritization and continuous product improvement.



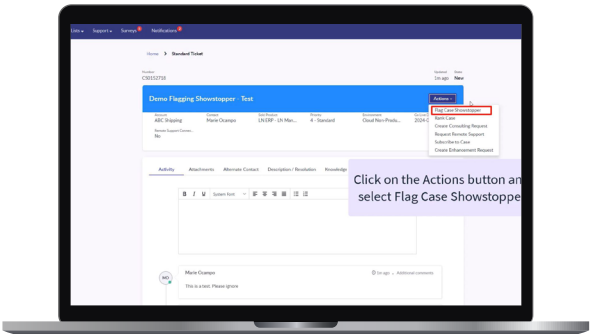
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Managing critical issues and escalations



Flag critical issues or those that might prevent or delay go-live

Highlight critical issues or go-live blockers early to ensure they receive the appropriate level of urgency and attention.

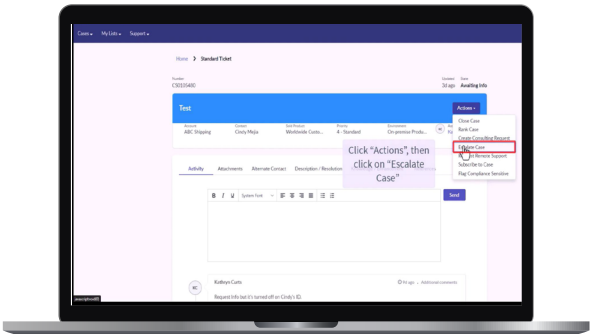


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Request an escalation

Use escalation paths for issues that are not progressing through standard support procedures or require additional management attention.



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STEP

3

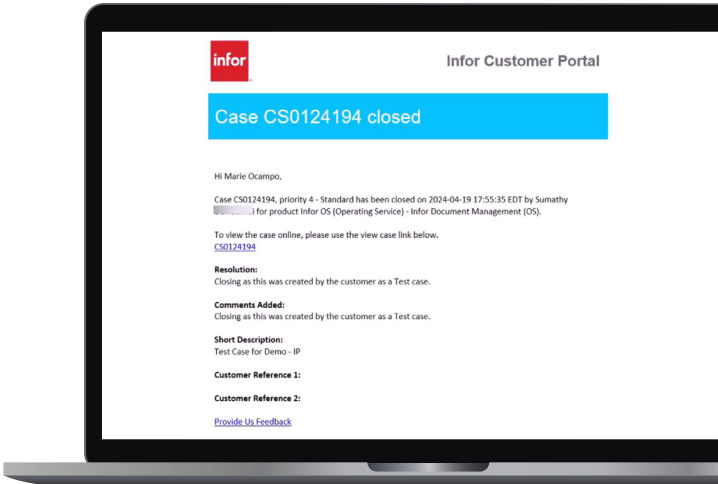
Confirm resolution and case closure



Work with support through resolution and confirm the issue is fully addressed

- Monitor case progress and respond to support requests
- When a case is marked **resolved**, review and accept or reject the proposed solution
- **Accepting** closes the case; **rejecting** returns it to support for additional follow-up

Case closure confirms a **successful resolution** and completes the case management process.



Clear communication, collaboration, and timely follow-through are key to successful case management.

About Infor

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Reach out to our
Customer Care Team
for additional support

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