

## Sage Software, Inc. Customer Support

Sage MAS 90 • Sage MAS 200 • Sage MAS 500 • Sage BusinessWorks • PFW • Sage MIP Fund Accounting • Sage Fundraising • Sage Accpac ERP • Sage Pro ERP • Sage BusinessVision • Sage CRM • Sage Accpac Options • Sage Accpac WMS • Sage Accpac Insight

Here at Sage Software Customer Support (CS) we want to talk to you and help resolve your software issues. Our trained CS analysts are not experts on everything, however, so for efficiency's sake, the scope of our analysts' conversations with customers is limited. Below is a light-hearted example:

Conversation Type	What CS Can Discuss	Things We Can't Touch	Where to Learn More	Additional Resources
Friendly chat	<ul style="list-style-type: none"> <li>▪ Local weather.</li> <li>▪ What to wear today.</li> <li>▪ TGIF.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Global warming.</li> <li>▪ How to pack for your upcoming vacation.</li> <li>▪ A lengthy synopsis of Star Wars.</li> </ul>	<ul style="list-style-type: none"> <li>▪ See the science and editorial newspapers.</li> <li>▪ See the travel section of the paper.</li> <li>▪ Read Roger Ebert.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="http://topex-www.jpl.nasa.gov/">http://topex-www.jpl.nasa.gov/</a></li> <li>▪ <a href="http://www.pleasantoholidays.com">www.pleasantoholidays.com</a></li> <li>▪ <a href="http://www.starwars.com">www.starwars.com</a></li> </ul>

Seriously, below are listed the things that we're experts on and would love to talk to you about.  
 Technical support is available through a ClientCare support package.  
 On Demand single support cases may be purchased upon request.  
 Also below are issues that your partner or another resource could handle more productively:

Inquiry Category	Sage Customer Support	Partner Support	Training and Documentation	Additional Resources
Network, Database or IIS Issues	<ul style="list-style-type: none"> <li>▪ Troubleshooting error messages or problems encountered when accessing Sage Software products over a network.</li> <li>▪ Provide suggestions on network configurations.</li> <li>▪ Procedural advice and suggestions regarding databases.                             <ul style="list-style-type: none"> <li>▪ <i>Example: How to determine if an issue is network or database related and suggestions to correct.</i></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Assistance with running Sage Software products on nonsupported operating systems, IIS and with different databases.</li> <li>▪ Installation, tuning or configuration of network, operating system or database.</li> <li>▪ Creating regular backup routines.</li> <li>▪ Perform data repair.</li> <li>▪ Advanced network consulting/training.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Consult the Installation Guide, User Guide, and other product documentation.</li> <li>▪ Refer to the current Supported Platform information on the Support website.</li> <li>▪ Consult the Support Knowledgebase and online resources.</li> <li>▪ Consult your Business Partner and Certified Consultant.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Your corporate System Administrator, Database Administrator or equivalently trained personnel.</li> <li>▪ Supported Platform Matrix on the support website.</li> <li>▪ Support resources available from manufacturer.</li> </ul>

Installation or Conversion	<ul style="list-style-type: none"> <li>▪ Troubleshooting problems regarding installation and workstation setup for software produced and supported by Sage Software.</li> <li>▪ Troubleshooting conversion problems encountered during conversion of Sage Software products.</li> <li>▪ Procedural advice regarding installation or conversion. <ul style="list-style-type: none"> <li>▪ <i>Example: How to avoid problems by using standard installation or conversion methods.</i></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Step-by-step software installation or conversion assistance.</li> <li>▪ Operating system or network installation, troubleshooting, or configuration.</li> <li>▪ Installation, conversion or configuration of software not purchased from Sage.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Consult the Installation Guide, User Guide, and other product documentation.</li> <li>▪ Consult the Support Knowledgebase and online resources.</li> <li>▪ Consult your Business Partner and Certified Consultant.</li> <li>▪ Training information is available from our <a href="#">Sage Software Learning Services</a> department.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Your corporate System Administrator or equivalently trained personnel.</li> <li>▪ Contact the specific software publisher or vendor.</li> </ul>
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Connectivity Issues for Hosted Products	<ul style="list-style-type: none"> <li>▪ Troubleshoot network communication issues encountered when accessing hosted Sage Software products.</li> <li>▪ Assist with resetting of passwords.</li> <li>▪ Troubleshoot local printing problems.</li> <li>▪ Information on network protocol, SQL network library and domain requirements for connecting Sage Software products to the SQL Server.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Configuration of computer or network communication protocols, such as TCP/IP.</li> <li>▪ General network communication issues (inability to ping server etc.).</li> <li>▪ Configuration of a domain, router, firewall, DMZ, etc.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Consult the Installation Guide, User Guide, and other product documentation.</li> <li>▪ Refer to the current Supported Platform information.</li> <li>▪ Consult your Business Partner and Certified Consultant.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Your corporate System Administrator, Database Administrator or equivalently trained personnel.</li> <li>▪ Consult the Support Knowledgebase.</li> </ul>
Printers	<ul style="list-style-type: none"> <li>▪ Troubleshooting Sage Software printing error messages or malfunctions.</li> <li>▪ Suggestions for alternative print drivers.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Recommendations on printer purchases.</li> <li>▪ Installation and configuration of printers and print drivers.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Consult the Installation Guide, User Guide, and other product documentation.</li> <li>▪ Refer to the current Supported Platform information.</li> <li>▪ Consult the Support Knowledgebase and online resources.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Your corporate System Administrator or equivalently trained personnel.</li> <li>▪ Printer vendor documentation and online resources</li> </ul>

<p>Customizations or Modifications</p>	<ul style="list-style-type: none"> <li>▪ Troubleshooting errors or problems to determine if caused by core product or customizations/modifications .</li> <li>▪ Basic advice relating to our data structures. <ul style="list-style-type: none"> <li>▪ <b>Example:</b> <i>Providing general information on the tables and fields in our software that contain the data you need.</i></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Designing, implementing, and troubleshooting custom or modified reports, forms, program files, imports, or exports.</li> <li>▪ Procedural advice or training.</li> <li>▪ Linking to data outside of your Sage Software package.</li> <li>▪ Linking outside products to data within the Sage Software package.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Consult the User Guide, Help, or Technical Reference Guide within your product documentation.</li> <li>▪ Consult the Support Knowledgebase and online resources.</li> <li>▪ Training information is available from our <a href="#">Sage Software Learning Services</a> department.</li> <li>▪ Consult your Business Partner and Certified Consultant.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Your corporate personnel trained in the module or function in which you are working.</li> <li>▪ Review the <a href="#">Development Partner Product Directory</a> for products available.</li> <li>▪ Sage Professional Services Group (PSG). Available via Business Partner.</li> </ul>
<p>Citrix and Terminal Services</p>	<ul style="list-style-type: none"> <li>▪ Troubleshooting errors or problems that occur within Sage Software products when deployed using Citrix or Windows Terminal Services.</li> <li>▪ Basic overview of Citrix and Terminal Services as they relate to our products.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Troubleshooting, installation, or configuration of Citrix or Windows Terminal Services applications.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Consult your Business Partner and Certified Consultant.</li> <li>▪ Consult the Support Knowledgebase and online resources.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Your corporate System Administrator.</li> <li>▪ Support resources available from manufacturer.</li> </ul>

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Sage Software Core Application Modules	<ul style="list-style-type: none"> <li>▪ Assistance in identifying the proper sequence of tasks needed to accomplish a larger process. <ul style="list-style-type: none"> <li>▪ <b>Example:</b> <i>Balancing payroll, quarter end processing, adding a new employee, etc.</i></li> </ul> </li> <li>▪ Answers to how a particular feature operates in a given scenario. <ul style="list-style-type: none"> <li>▪ <b>Example:</b> <i>How a particular deduction is calculated and printed on a paycheck.</i></li> </ul> </li> <li>▪ Assistance in the proper procedures needed to install or upgrade the product.</li> <li>▪ General Sage Software module configuration questions.</li> <li>▪ Troubleshooting errors or warning messages occurring within Sage Software products.</li> <li>▪ Suggestions and troubleshooting information for issues such as reconciliation difficulties.</li> <li>▪ <i>Procedural advice on product features.</i> <ul style="list-style-type: none"> <li>▪ <b>Example:</b> <i>How to reconcile the Accounts Payable balances to the GL account balance. (However, the customer may have to compare reports, journals, &amp; registers to discover and reconcile differences.)</i></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Configuration of company specific module setup or business process analysis or reengineering. <ul style="list-style-type: none"> <li>▪ <b>Example:</b> <i>Configuring Inventory setup options.</i></li> <li>▪ <b>Example:</b> <i>Configuring Inventory product lines and valuation methods.</i></li> </ul> </li> <li>▪ Training or tutorials on the use of Sage Software products.</li> <li>▪ Performing reconciliation of Sage Software's application modules or external reports.</li> <li>▪ Modification or customization assistance.</li> <li>▪ General accounting questions.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Consult the User Guide, Help and module specific documentation within your Sage Software product.</li> <li>▪ Consult the Support Knowledgebase and online resources.</li> <li>▪ Training information is available from our <a href="#">Sage Software Learning Services</a> department.</li> <li>▪ Consult your Business Partner and Certified Consultant.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Your corporate personnel trained in the module or function in which you are working.</li> <li>▪ Your corporate accountant.</li> </ul>

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<p>Productivity Tools, Options and Add-On Products (partial list of products)</p> <ul style="list-style-type: none"> <li>▪ Crystal Reports (All product lines)</li> <li>▪ Data Migrator (MAS/BusinessWorks /PFW/MIP/Fundraisin 9)</li> <li>▪ Visual Integrator (MAS90/MAS200)</li> <li>▪ Report Master (MAS90/MAS200)</li> <li>▪ Import Master (MAS90/MAS200)</li> <li>▪ Grid Export (MAS500)</li> <li>▪ Data Import (MIP)</li> <li>▪ Query (Accpac/Pro)</li> <li>▪ Sales Optimizer (Accpac/Pro)</li> <li>▪ CFO and KPI (Accpac/Pro)</li> <li>▪ Financial Link Pro (Accpac/Pro/BusinessVision)</li> <li>▪ Alert Server/Pro Alerts/Business Alerts(Accpac/Pro/MAS90/MAS200)</li> <li>▪ EFT or Direct Deposit (Accpac/Pro)</li> <li>▪ Intercompany Transactions (Accpac/Pro)</li> </ul> <p>NOTE: Modification of existing and creation of new reports requires in-depth knowledge of the Sage Software data structures or database schema and relationships. This knowledge is required for Customer Support to effectively assist you with these tools.</p>	<ul style="list-style-type: none"> <li>▪ Troubleshooting problems regarding installation and workstation setup for products supported by Sage Software.</li> <li>▪ Troubleshooting errors or problems that occur during Crystal Reports for Sage Software installation and when linking to Sage Software data. <ul style="list-style-type: none"> <li>▪ <b>Example:</b> <i>Registering Crystal DLL's as part of the Crystal trouble-shooting process.</i></li> </ul> </li> <li>▪ Troubleshooting errors or problems that occur within bundled and unmodified Sage Software standard reports or forms.</li> <li>▪ Troubleshooting errors or problems that occur within Sage Software products during data transfer or import.</li> <li>▪ Errors or issues that occur specifically in the grid export process.</li> <li>▪ Troubleshooting errors or problems that occur specifically when using bundled alerts.</li> <li>▪ Data discrepancies caused by Intercompany Transactions, Data Migrator, or other Sage Software products.</li> <li>▪ Assistance in locating table and field names to write reports.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Step-by-step software installation or conversion assistance.</li> <li>▪ Designing customized reports, forms, imports, or exports.</li> <li>▪ Training on any Productivity Tools, Options or Add On products.</li> <li>▪ Creating and troubleshooting custom Alert events and actions.</li> <li>▪ Issues occurring specifically within Microsoft Office.</li> <li>▪ Advanced consulting on custom reports.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Consult the User Guide, Help and documentation within your Sage Software product.</li> <li>▪ Consult the Support Knowledgebase and online resources.</li> <li>▪ Training information is available from our <a href="#">Sage Software Learning Services</a> department.</li> <li>▪ Consult your Business Partner and Certified Consultant.</li> </ul>	<ul style="list-style-type: none"> <li>▪ An authorized <a href="#">Crystal Reports training center</a>.</li> <li>▪ Your corporate personnel trained in the product or function in which you are working.</li> <li>▪ Contact the specific software publisher or vendor.</li> </ul>
<p>Third-Party Products</p> <ul style="list-style-type: none"> <li>▪ FRx (MAS/BusinessWorks /PFW/MIP/Fundraisin 9)</li> <li>▪ F9 (MAS/BusinessWorks /PFW/MIP/Fundraisin 9)</li> <li>▪ IBM DB2 UDB (Sage Accpac ERP)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Troubleshooting error or problems that occur when linking to data contained within Sage Software products</li> <li>▪ Assist with basic presales questions regarding Sage Software product features and if any known third-party product solutions. <ul style="list-style-type: none"> <li>▪ <b>Example:</b> <i>MICR printing of Accounts Payable checks not part of Sage Software products but Development Partner solutions available.</i></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Assist with needs analysis and evaluation of third-party product solutions.</li> <li>▪ Installation, integration and troubleshooting of third-party products.</li> <li>▪ Modification or customization assistance.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Consult the <a href="#">Development Partner Product Directory</a> for available products, contact information and documentation.</li> <li>▪ Consult the Support Knowledgebase and online resources.</li> <li>▪ Consult your Business Partner and Certified Consultant.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Your corporate personnel trained in the third-party product in which you are working.</li> <li>▪ Support resources available from the manufacturer of the third-party product.</li> </ul>

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Fixed Assets Link Payroll Integration Services	<ul style="list-style-type: none"> <li>▪ Troubleshooting errors or problems that occur within Sage Software products when linking to these products/services.</li> <li>▪ Procedural advice regarding linking and troubleshooting. <ul style="list-style-type: none"> <li>▪ <b>Example:</b> <i>Opening FAS Link error logs to cross-reference account numbers for troubleshooting purposes.</i></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Procedural advice or training.</li> <li>▪ Linking to data outside of your Sage Software package.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Consult the User Guide, Help and documentation within your Sage Software product.</li> <li>▪ Training information is available from our <a href="#">Sage Software Learning Services</a> department.</li> <li>▪ Consult your Business Partner and Certified Consultant.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Your corporate personnel trained in the module or function in which you are working.</li> <li>▪ Consult the Support Knowledgebase and online resources.</li> </ul>
ODBC	<ul style="list-style-type: none"> <li>▪ Troubleshooting errors or problems that occur within Sage Software products when linking to data contained within your Sage Software package using our ODBC driver.</li> <li>▪ Basic procedural advice regarding ODBC and data sources as they relate to trouble-shooting our products. <ul style="list-style-type: none"> <li>▪ <b>Example:</b> <i>Using ODBC Administrator to configure an Excel data source for use with our products.</i></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Procedural advice for manipulating data or training related to our ODBC driver.</li> <li>▪ Linking to non-Sage Software data.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Consult the User Guide, Online Help, or What's This Help within your Sage Software product.</li> <li>▪ Consult the support knowledgebase.</li> <li>▪ Training information is available from our <a href="#">Product Education</a> department.</li> <li>▪ Consultant Alliance Program members and Non-Self Maintaining Customers should contact their channel partner.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Your corporate personnel trained in the module or function in which you are working.</li> </ul>
<p><b>NOTE:</b> Not all third party software is supported by all Sage Software product lines. If in doubt, contact the respective product's support center for further details.</p>				