Sage Business Care Support Services

Customers are our top priority and the lifeline of our organization. We consistently operate with our customers' best interests in mind and offer professional assistance — through online self-service options, world-class phone support, and an extensive network of business partners, certified consultants, and authorized training centers.

The Sage Support and Services team delivers an innovative advisory approach to help Sage customers better utilize and derive more value from Sage solutions. In addition to answering questions and resolving technical concerns, Sage proactively offers valuable advice on using Sage solutions to their fullest potential – helping customers realize a higher return on investment by:

- Gaining greater insight into business activities
- Operating business more effectively by maximizing the capabilities of Sage solutions to improve business processes
- Improving business efficiency by leveraging Sage solutions to reduce the time, resources, effort, and cost of operations

Sage Business Care plans provide customers with access to a variety of valuable services, such as:

- Optimizing the effectiveness and efficiency of Sage solutions to achieve business results
- Troubleshooting or resolving technical and non-technical issues that may be encountered during Sage software installation or use
- Identifying and recommending where additional product training would be of value
- Determining the need and referring appropriate resource(s) to assist with non-Sage issues
- Accessing Live Chat – Connect with a Sage Support team member in real-time. Online chat support is an excellent choice for "quick questions" and lower-complexity issues
- Taking advantage of multiple Sage self-service support resources with access to:
    - Knowledge Management – The Sage Customer Support team is dedicated to empowering customers to easily find solutions, 24x7. Benefit from industry-standard Knowledge-Centered Support best practices that focus on rapid creation and sharing of knowledge from our Sage collective experiences
    - Social Communities – Available 24x7, product support forums are an excellent place to search for solutions, ask questions, get answers, and share knowledge and experience.
    - Web – Create Support cases online – Great for non-urgent support issues, after utilizing other self-service options

Our goal is to ensure that our customers receive exceptional service from the best resource available to answer questions quickly and accurately. We work to resolve our customers' Sage product-specific questions and concerns; however, when customers are experiencing issues outside the scope of Sage products, we will refer customers to the appropriate resource who is best equipped to assist with those issues. These resources

may be the customer's internal personnel, a Sage-authorized business partner, a certified consultant, or a third party provider. Sage's Professional Services and Learning Services teams also offer a wide variety of services.

Topics that are not covered under a Sage Business Care plan, where a Sage Customer Support team member will proactively provide the most appropriate alternative resource, include:

- Training – Sage Learning Services team is the best resource for training, offering classroom training, real-time Learning, custom training, self-study guides, and an annual customer conference. Visit Sage University to search and register for courses and products, monitor your learning progress through training tracks, and join online communities with product experts and other customers.
- Perform software, product, application, or job-related activities, such as software installation, data entry, creating reports, etc.
- Assist with third party software* (installation, training, trouble shooting, integration, etc.)
- Provide organization-specific consulting or accounting advice
- Repair data or database issues caused by user error or third party software

Please refer to the chart below for additional information and resources. For additional questions, please contact a Sage Customer Care team.

***** Please note that references in this document to third party software, products or applications, does not encompass all third party software, products and applications that Sage provides (directly or through an authorized Sage Business Partner) as part of a customer's solution.

Category	Sage Business Care Service Coverage	Outside of Sage Business Care Service Coverage	Additional Resources
Installation & Upgrades	• Clarification of any installation or upgrade steps • Troubleshooting problems encountered during installation and upgrades	• Step-by-step installation assistance • Local (on-site) or remote (via Terminal Services, GoToAssist, etc.) installation services • Consulting services to install or resolve non-Sage installation issues specific to your organization's technical environment	• Your Sage-authorized Business Partner (BP) • Your own IT staff • Sage KB & Social Communities
Setup, Configuration & Data Conversion	• Clarification of what various fields and codes mean and how they are used • Guidance on how to fix problems • Troubleshoot problems encountered during setup, configuration and data conversion of Sage product • Recommendations on usage of Sage products in your organization	• Consulting services, such as gaining an in-depth understanding of your organization's needs and customizing your configuration to meet those needs • Step by step migration of data from your previous software version or other software solution (but see info in the "Import/Export" section) • Configuring third party applications • Creating or troubleshooting customizations (i.e. HTML SQL scripts & triggers, etc.) • Training	• Your Sage-authorized BP or Sage Learning Services • Your own IT staff • Sage KB & Social Communities • For third party info, go to www.sagepss.com
Data Entry/ Product Operations	• Guidance on how to fix problems created by incorrect data entry through the Sage product interface • Clarification of what various fields mean or processes you may find confusing • Troubleshooting problems encountered with data entry or product operations • Troubleshoot Sage product related errors and messages	• Analyzing your individual transactions to determine the source of a data entry error • Advice regarding how to code individual transactions • Reconciling your bank statement • Training • Assistance with data entry or manipulation outside the Sage user interface	• Your Sage-authorized BP • Sage Learning Services • Authorized data repair centers • Your accountant • Sage KB & Social Communities
Import / Export	• Guidance on proper format for importing data into your Sage product • Troubleshooting errors encountered when importing data into your Sage product • Troubleshooting problems encountered exporting data from your Sage product	• Exporting accurate data from third party software or validating/formatting it for you so that it can be imported into your Sage product • Creating your data definition files or mappings for importing data • Importing data into a third party product • Usage and configuration questions on third party products • Training	• Your Sage-authorized BP, or Sage Learning Services • Your accountant • The third party software publisher • Sage KB & Social Communities • For third party info, go to www.sagepss.com

Category	Sage Business Care Service Coverage	Outside of Sage Business Care Service Coverage	Additional Resources
Reporting	• Clarification of what various reporting options mean • Troubleshooting problems encountered when setting up or running reports • Guidance on creating/ customizing/ refining a basic report to meet your reporting needs • Guidance on basic problems encountered with Sage provided reporting tools such as Crystal Reports	• Creating or designing reports for you • Troubleshooting problems encountered with customized reports or third party reporting programs or tools (formatting formulas, parameters, etc.) • Assistance with connecting to your Sage data for use with third party reporting tools • Training on use of third party products • Training	• Your Sage-authorized BP • Sage Learning Services • The third party software publisher • Your own IT staff • Sage KB & Social Communities • For third party info, go to www.sagepss.com
Hardware, operating systems (OS), database platforms, Internet Information Server (IIS), browsers, etc.	• Clarification of system recommendations and requirements • Guidance on any specific configuration settings required by your Sage product • Troubleshooting printing errors received in your Sage Product when printing is working otherwise	• Installation • Configuring vendor systems such as desktop operating system, Microsoft Server and/or SQL Server, IIS, SMTP, remote services, etc. • Troubleshooting stability, performance or other problems • Troubleshooting operating system issues – firewall, antivirus, permissions) • Troubleshooting, installation, or configuration of your Virtual environment (Citrix, VMWare, HyperV, etc) • Assistance with installation or set up of email browsers, etc. • Assistance with printer connectivity or configuration • Training	• Your own IT staff • Your Sage-authorized BP • Your hardware, OS, database, IIS or browser vendor • Sage KB & Social Communities
Network connectivity	• Troubleshooting connectivity issues within your Sage product when your supported network infrastructure is otherwise working • Troubleshooting connectivity to a Sage hosting center when Internet connectivity is working	• Troubleshooting internet connectivity • Troubleshooting other connectivity issues that exist outside of your Sage product • Assistance with unsupported networks. • Installation, troubleshooting or configuration of network (WAN/LAN) security/cards/cabling/hardware/software • Training	• Your own IT staff • Your Internet Service Provider (ISP) • Your Sage-authorized BP • Your external vendor