

# The Sage 200 Customer Handbook

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Sage



# About this Handbook

This handbook provides insight into our direct support programs and enables you to quickly identify helpful information you may need, when using Technical Support.

It describes how to engage with Technical Support, raise a product idea, and provides detail on release policies, support offerings and other valuable information to meet your business needs.

In order to provide you with a quality service, we ask that you and anyone across your business who uses the support desk read this document and adhere to the outlined procedures and guidelines.

This handbook describes the support available for the following software:

- Sage 200 Standard Online
- Sage 200 For Education

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# Overview of Support



# Before contacting us

## Important Information

For us to be in the best position possible to provide a solution or meaningful update, please make a note of the following prior to raising a case:

- What is happening?
- Where is it happening?
- What were you doing prior to the issue occurring?
- Is there an error message? (If so, please take a screenshot)
- Is it just happening to you or are your colleagues affected?
- If you restart the application, does the issue still occur?

**NOTE:** It is important for us to understand the impact the problem is having on your business, including any workaround you are currently following, click [here](#) for guidance on the information we require to establish an accurate business impact.

## Other things to consider

Could your problem be an online connectivity issue? Please assess your Internet connection and check [status.sage.com](https://status.sage.com) for connectivity issues that may be affecting our service.

If you experience intermittent performance problems, please review our guide to [Troubleshooting Slow Performance](#).

**TIP:** If you have an idea for a feature you'd like to see included or to give feedback on how a feature currently works you can do this in the [Ideas Portal](#).

# Digital Help

The [Help Panel](#) on the right-hand side of Sage 200 forms provides content-specific help, this is the quickest way to get an answer to 'how-to' questions. If it is not visible click on the '?' in the top right corner of the form.

**TIP:** Pressing F1 on the screen on which you need assistance will take you to the relevant section of the [Helpfiles](#). The [Helpfiles](#) also contain some very useful videos on common processing queries. Additional support and solutions to problems can be found by searching our [Help Centre](#).

**TIP:** We are always looking to improve our help content. Feedback can be provided directly to our Technical Authors by using either the 😊 icon in the top right-hand corner or the Did you find this helpful option at the bottom of the panel.

Information and answers to commonly asked questions are available 24/7 through self-service options, such as:



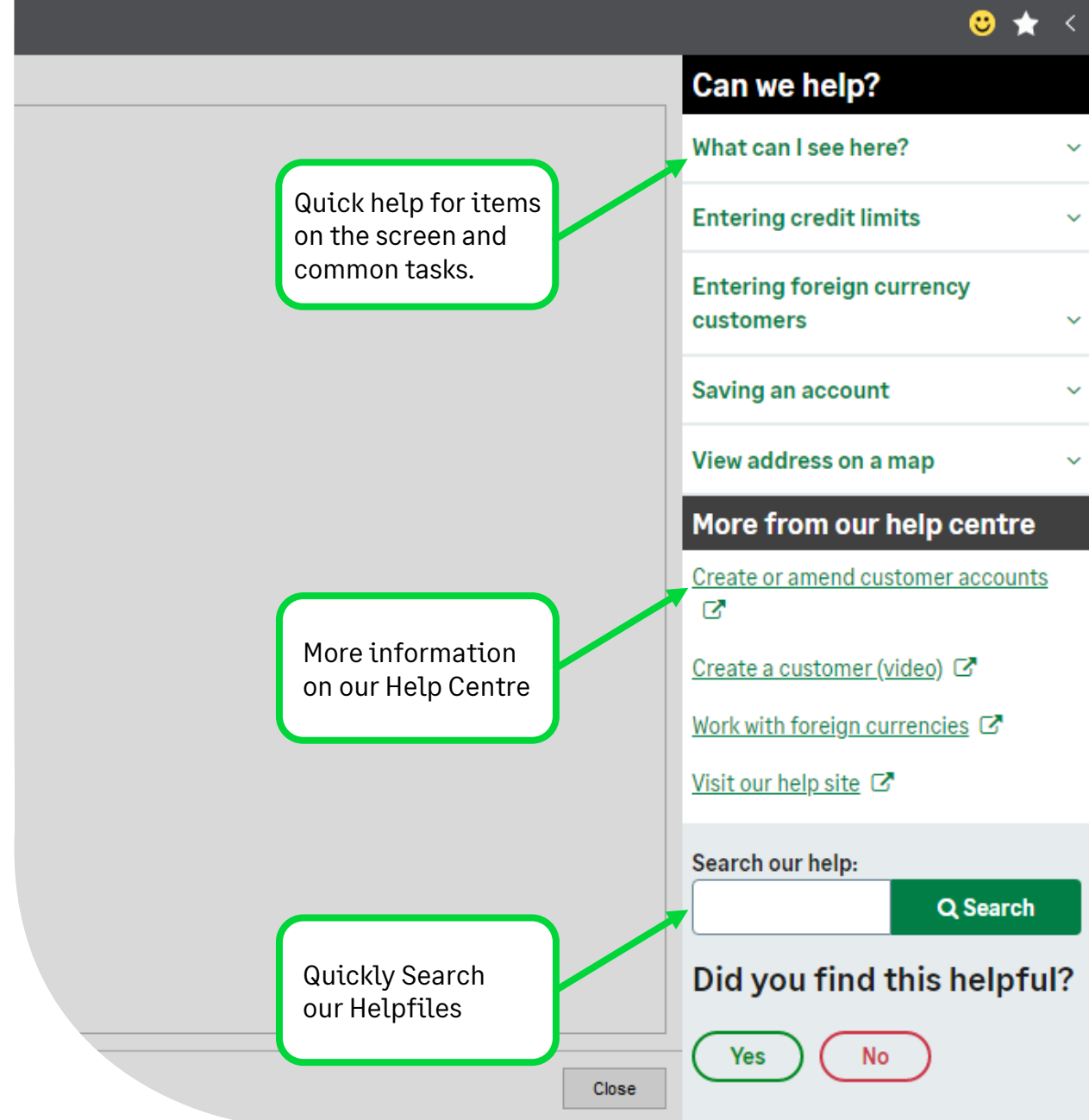
[Helpfiles](#)



[Help Centre](#)



[Community Hub](#)



# Contacting Technical Support

## Account Validation

Sage value the importance of data security. We want to make sure that we're doing everything we can to make sure the right people get access to the right accounts.

To make contacting us easier, we recommend that you create a MySage login and have the following details to hand when calling:

- Your account number
- Your company name and address
- Any password that may have been set on your account

**NOTE:** For further details on contacting the Technical Support team click [here](#).

## Support Contact Details and Availability

Technical Support is available by telephone on +44 (0) 191 4795955

Lines are open Monday to Friday, 9 am to 5 pm.

The support lines are not available on UK public holidays or weekends.

## Line Closures

Every Wednesday, 9 am – 9:15 am the team has a training briefing.

On the last working Wednesday of every month, the lines are closed 9 am - 10 am.

**NOTE:** These dates are subject to change, details of any variation will be published via in-product messaging.

# Support Boundaries

The Technical Support team will provide information, or answer queries, relating to the standard functionality of the Sage 200 software which is not covered within the documentation provided, such as the Desktop Help and Help Centre. These resources should be used in the first instance to try and resolve your query, only using our support lines when you are unable to proceed.

Any problems caused by third party customisations, should be investigated, and corrected by the third party.

If you require support on non-Sage products, networks or hardware you will need to contact your IT support provider (Sage can provide some guidance on recommended settings. For example, Firewall configurations can be found [here](#)).

For advice on general accountancy practice, or support with reconciling transactions we would recommend contacting an accountant.

For traceability and continuity in your Sage 200 application, the Technical Support team cannot process or correct transactions on your behalf.

Our accredited Business Partners can provide software training / professional services. Further information is available [here](#).





# Where to get help

This table gives guidance on how and where to get assistance depending upon the nature of your query.

Type of query	How to proceed	Additional information
<b>How Do I?</b>	<p>The <a href="#">Help Panel</a> on the right-hand side of Sage 200 forms provides content-specific help. If it is not visible click on the '?' in the top right corner of the form.</p> <p>You can also get specific in-product help by pressing F1 on the screen on which you need assistance or by browsing/searching the <a href="#">Helpfiles</a> for your chosen topic.</p>	<p>If you are unable to find a solution, contact the Technical Support team on +44 (0) 191 4795955.</p> <p><b>NOTE:</b> The <a href="#">Helpfiles</a> also contain instructional videos.</p>
<b>Problems or Issues</b>	<p>Our <a href="#">Help Centre</a> has solutions to problems which customers have reported to us in the past. Check <a href="https://status.sage.com">status.sage.com</a> for connectivity issues that may be affecting our service.</p>	
<b>Report Design</b>	<p>Sage offers a Report Design Service for Sage 200.</p>	<p>See the <a href="#">Sage 200 Services</a> section.</p>
<b>Training</b>	<p>eLearning\Self Study.</p> <p>Instructor-led, Remote and Onsite Training.</p>	<p>Online training is available through <a href="#">Sage University</a>.</p> <p>Our <a href="#">Helpfiles</a> also contain instructional videos.</p> <p>Further information is available <a href="#">here</a>.</p>
<b>Additional Services</b>	<p>Health and Safety, HR and Business advice.</p> <p>Our Business Partners can offer a range of professional services.</p>	<p>See the <a href="#">Sage 200 Services</a> section, <a href="#">Business Advice</a> and <a href="#">Business Legislation Hub</a>.</p> <p>Further information is available <a href="#">here</a>.</p>

# Priority Levels & Response Times



# Priority Levels

Priority levels are validated by the technician based on the information provided via the [Business Impact Analysis](#).

It is therefore important to provide accurate and appropriate information to ensure the correct priority is assigned.

Priority	Descriptor	Priority used For
<b>Critical</b>	Business Critical	<ul style="list-style-type: none"><li>•The software is inoperable, and no workaround is immediately available.</li><li>•All or a substantial portion of the customer’s mission-critical data associated with the software is inaccessible.</li><li>•The customer is experiencing a substantial loss of service due to the software.</li><li>•Support may require the customer to have dedicated resources available to work on the issue on an ongoing basis until the case is resolved.</li><li>•Security of data/site is in question.</li></ul>
<b>High</b>	Major Impact	<ul style="list-style-type: none"><li>•A major piece(s) of functionality within the software are severely impaired.</li><li>•The customer can continue with restricted processing, although long-term productivity might be adversely affected.</li></ul>
<b>Medium</b>	Limited Impact	<ul style="list-style-type: none"><li>•Involves partial, non-critical loss of functionality of the software.</li><li>•Some software components are affected but can continue using the software.</li><li>•Users can reasonably work around such inconsistency or impairment.</li></ul>
<b>Low</b>	Cosmetic/How do I?	<ul style="list-style-type: none"><li>•The software is functioning consistently, and the customer’s usage and productivity are not impaired.</li><li>•Can also refer to general usage questions, cosmetic issues, errors in the documentation, feature suggestions and requests for information.</li></ul>

# Response Times

**NOTE:** The following is a general guide, depending on the circumstances surrounding the case we may agree on alternative update intervals with you.

Priority	Initial Response	Case Updates
<b>Critical</b>		Provided every working day.
<b>High</b>	We aim to answer all calls as quickly as possible. As our technicians are not always trained in all areas of the product, it is essential that you select the correct telephone menu options	Provided within every 3 working days.
<b>Medium</b>		Provided within every 7 working days.
<b>Low</b>		Provided within every 12 working days.

# Support Tools & Resources



## News & Urgent Information

Any additional urgent information we need to provide, such as product releases or changes in technology will be communicated via in-product messaging.

**TIP:** Our cloud service status can be viewed at [status.sage.com](https://status.sage.com).

## Remote Diagnostics

If you are experiencing a problem that is best observed in real-time, we offer remote diagnostic assistance at our discretion.

To enable this to function, you need a computer that can connect to the Internet. We use a tool called [LogMeIn](#), this involves you downloading a coded file which, once activated, establishes a connection between Sage and yourselves.

As an alternative, with your permission, we can connect to your company from our systems to investigate the data remotely whilst on the call.

For traceability and continuity in your Sage 200 application, the Technical Support team cannot process or correct transactions on your behalf.

**NOTE:** Remote sessions are not usually offered between 12 pm and 2 pm.

## Data

If a problem can't be identified/resolved during the call, the technician may ask for a copy of the data if appropriate.

We can access a copy of your data directly from the Sage Provisioning Portal but only do so with your expressed consent. This data is stored securely on our internal server and then disposed of once the case is resolved. We will not keep data for longer than is necessary and will not share this without prior consent.

## Software Downloads

The Sage 200 Standard/Sage for Education application uses Microsoft click-once technology to install onto a user's desktop. The application itself has a very small footprint as the data is hosted on the Sage Business Cloud.

System Requirements and guidance on setting up the system can be found in our [Help Files](#).

The Sage 200 applications can be downloaded via [Sage Provisioning Portal](#) or by using the following links:

[Sage 200 Standard Application](#)

[Sage 200 Web App](#)

# Sage 200 Services

All Sage 200 customers now receive Sage 200 Services as part of their licence, giving a range of benefits. This includes HR and Health & Safety advice, further information is available [here](#).

## Report Design

Sage 200 Services offers you exclusive access to the Sage 200 Report Design Team and Report Library.

As part of Sage 200 Services, you can request up to three bespoke reports per year by product registration date. To review what falls within the scope of this service or to book an appointment to request a new report, please view the [Report Design Process](#).

Extra reports and layout designs can be purchased as required, simply book an appointment to discuss your requirements.

The Reports Library gives access to ready-made reports, further information is available [here](#).

We do not offer telephone support on using Sage Report Designer, [self-service guides](#) are available, or you can search the in-product help files by pressing F1 while in your software.

We don't offer any support for Excel Reporting design or queries.



# Support Processes

## Escalation Process

Should you have concerns about the progress of an outstanding case, in the first instance, contact a member of the Sage 200 Technical Support team to discuss the matter further.

Ensure you have the Sage case reference available, and you will be directed to the appropriate person dealing with this case.

If you're unhappy with the response you receive from the support team, please contact the team manager who will ensure that your concerns are investigated accordingly.

Jimmy Beck - Customer Services Manager

Tel: +(44) 0191 479 5933

Email: [Jimmy.Beck@sage.com](mailto:Jimmy.Beck@sage.com)

We always strive to provide excellent levels of service and your feedback is always appreciated to help us to help you.

## Defect Resolution Process

Every defect will go through an investigation to understand the root cause, the approach required to correct and the risk surrounding any fix.

Once the team has evaluated a defect and the possible solutions, it can reveal that pervasive code changes are required. Where these types of fixes are identified we can only consider them for a major product release and would need to discuss all options and workarounds with you to minimise the impact on you during the intervening period.

There are occasions where, due to the technical complexity and associated risk, it is not possible to correct the defect. When this arises, we may arrange a conference call with you to discuss the options available.

## How we prioritise

Defects are prioritised using a number of criteria;

- Priority
- The number of customers impacted
- Risk
- Complexity
- Compliance
- Legislation



# Feedback

## Satisfaction Surveys

Technical Support are committed to providing industry-leading support. Our company ethos is to deliver a valued service to our customers which we can only achieve with the help of your feedback.

Surveys are periodically sent from our case tracking system upon the closure of a case. Survey results are shared with technicians and the Technical Support leadership team to help identify areas of improvement on which we can continue and enhance excellence in service to you.

Critical to success is receiving data-rich feedback on areas we need to improve. We would very much like to hear from you if the Technical Support team has not met your expectations.

Please provide an explanation for your score, this is particularly important when we have failed to meet your expectations, and we may contact you to gain insight when the free text field has not been completed.

We appreciate all feedback be it positive or developmental and would expect all users of the support service to participate.

## Trustpilot Surveys

You may be sent an invitation to complete a [Trustpilot](#) survey upon the closure of a case.

Trustpilot gives our customers and partners a direct line of communication to provide feedback on our business and the service we provide.

Where appropriate we would appreciate if you could mention by name the individual support agent so that your feedback can be shared with them.

# Microsoft 365 Connectivity

Sage 200 products can connect to various Office 365 applications, Further information is available [here](#).

This is an ongoing project, and we would value your [ideas](#) for future development in this area.

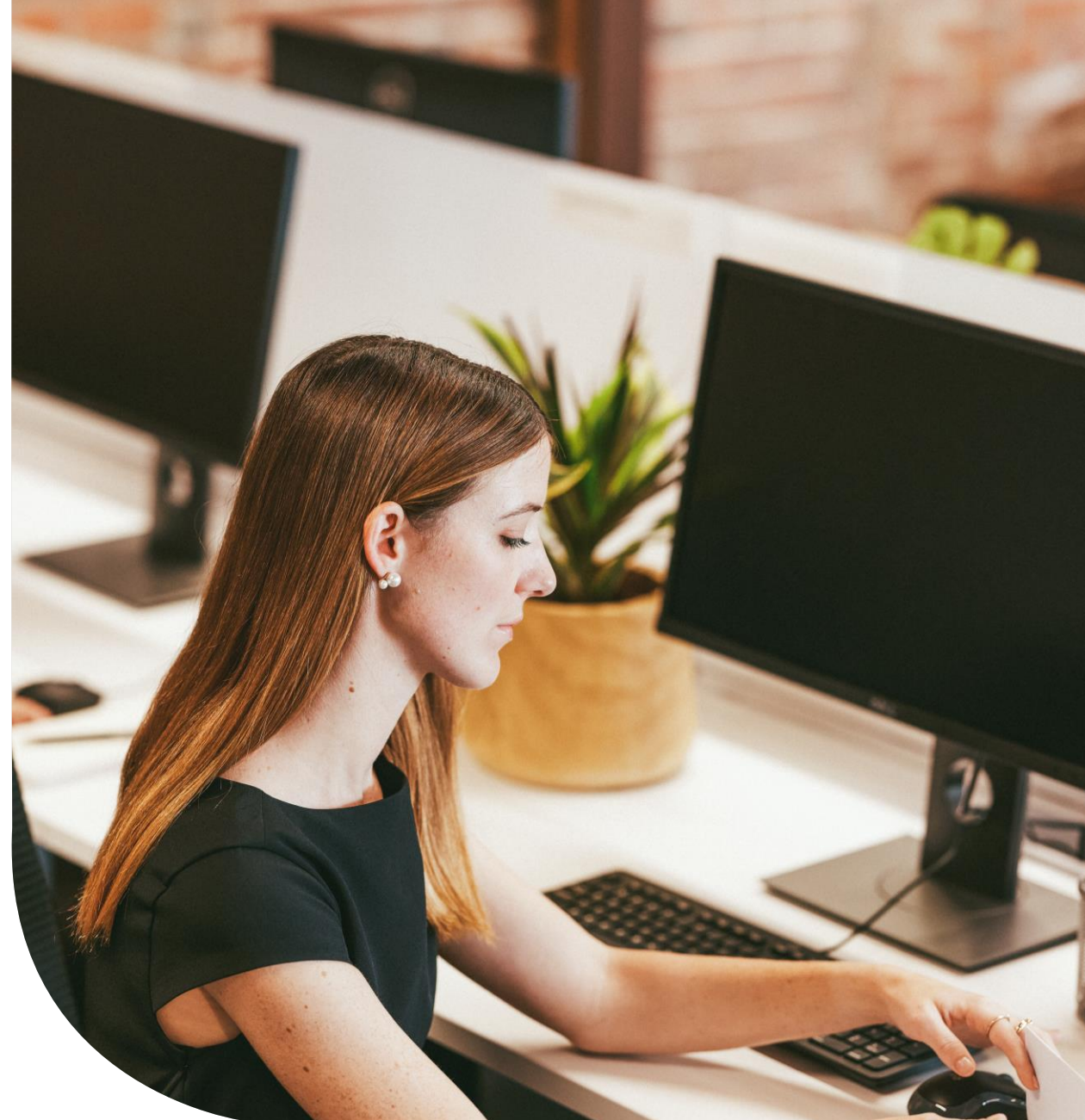
## Compatible Microsoft 365 Subscriptions

To be able to connect your Microsoft 365 license with your Sage 200 registration, you must have a compatible Microsoft 365 Subscription, a list of compatible subscriptions is available [here](#).

## Support Boundaries

Support is provided in connecting Sage 200 to an Office 365 tenant and with official Sage applications.

**NOTE:** Support isn't provided in setting up custom connectors or ad-hoc Microsoft 365 customisations. Further information is available [here](#).



# The Sage Community Hub



Sage

# What is Community Hub?

Community Hub is an online platform offering forums to discuss Sage solutions, current topics, and industry challenges. It's the place to help you and others build, support, and learn.

The Sage 200 UKI Support Community can be accessed [here](#).

The Business Advice area can be accessed [here](#).

## Joining Community Hub

Registration is not required to view Community Hub, but you need an account to participate.

If you already have a Sage Account Login you just need to log in.

If you don't have a Sage Account Login, signing up is easy - further details and help guides can be found [here](#).



# Product Improvements

## The Sage 200 Ideas Portal

The [Ideas Portal](#) is your opportunity to shape the future of Sage 200.

If you believe the functionality of the product can be enhanced or if you have a request for a new feature, you can submit your idea via the [Ideas Portal](#).

You can browse and use the search functionality within the [Ideas Portal](#) to view ideas logged by other Sage 200 users, you can vote for and/or comment on these ideas.

There is also the chance that another customer has already submitted the same idea, when you enter a new idea, you will be presented with a list of similar ideas. If the idea already exists, please select it and add your vote rather than adding a duplicate.

Before submitting an idea, it is important to explore all alternatives; Technical Support may be able to advise on different ways to use the system.

There is also the possibility that the requirement can be achieved through another means.

New ideas will be reviewed by our product team and either accepted as a valid idea or further guidance will be offered.

All ideas are considered for inclusion in future releases based on customer demand, along with the timescales required to develop, implement and test the new feature.

Features being enhanced or added are at the request of our customer and partner community. Every voice and business type must be heard, so votes and comments on the [Ideas Portal](#) are consulted.

Each release of the software includes new features, details of these are included within our release documentation, [online help](#), and our [Sage 200 Roadmap](#) is also updated.

During the development of new features, you may be contacted by our team of business analysts who will explore the feature requirements and use this information when we develop the feature.

## Product Roadmaps

You can see a timeline of the new functionality that we have delivered along with what's coming soon, and in the future, by visiting the [Sage 200 Roadmap](#).

# Useful Links

Area	Link
Sage 200 Standard Help Files	<a href="http://desktophelp.sage.co.uk/sage200/sage200standard/Content/Home.htm">http://desktophelp.sage.co.uk/sage200/sage200standard/Content/Home.htm</a>
Help Centre (including Knowledgebase)	<a href="https://my.sage.co.uk/public/help.aspx#/customer">https://my.sage.co.uk/public/help.aspx#/customer</a>
Sage Community Hub - Sage 200	<a href="https://communityhub.sage.com/gb/sage-200">https://communityhub.sage.com/gb/sage-200</a>
Sage Provisioning Portal	<a href="https://www.sageerponlineservices.com/">https://www.sageerponlineservices.com/</a>
Sage 200 Ideas Portal	<a href="https://sage200uki.ideas.aha.io/">https://sage200uki.ideas.aha.io/</a>
Sage 200 Product Roadmap	<a href="https://my.sage.co.uk/public/help.aspx#/roadmap/sage-200">https://my.sage.co.uk/public/help.aspx#/roadmap/sage-200</a>
Sage 200 Services	<a href="https://gb-kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=200427112444109">https://gb-kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=200427112444109</a>
System Maintenance/Monitoring	<a href="https://status.sage.com/">https://status.sage.com/</a>
Business Legislation Hub	<a href="https://my.sage.co.uk/public/help.aspx#/customer/support/compliance/category">https://my.sage.co.uk/public/help.aspx#/customer/support/compliance/category</a>