# User change parameters

## Products: Sage 200 (all variants)

*Last Updated: July 2023*

This document details the circumstances under which user details can be added/changed, who will make the changes and guidance where necessary for specific scenarios.

Note: where we refer to Sage Provisioning Portal this refers to the list of users added to the Portal, who could in turn then have access to Sage 200.

| Activity connected with User creation/ amendment | Product (& Variant) | Who undertakes the activity | Notes |
|---|---|---|---|
| Setting up a new customer who has purchased Sage 200 | Sage 200 Standard inc Education | • Partner | Partners can set up the customer as part of the new customer and new site setup in the Sage provisioning Portal. Where you know the customers Sage CRM ID this can be entered into the Portal, it will sync with our CRM systems. The Customer admin user/customer operations agent will be set for the site as part of this onboarding journey. |
| | Sage 200 Professional | • Sage | Partner is responsible for completing the necessary order paperwork and sending into BPSales@sage.com |
| | Sage 200 Professional (via SPC) | • Partner | Partners can set up the customer as part of the new customer and new site setup in the Sage provisioning Portal. Where you know the customers Sage CRM ID this can be entered into the Portal, it will sync with our CRM systems. The Customer admin/customer operations agent user will be set for the site as part of this onboarding journey. |
| Adding new customer users to Sage Provisioning Portal | Sage 200 Standard inc Education | • Partner<br>• Customer Admin<br>• Customer operations agent | In the first instance the customer is responsible for their user maintenance in the Portal. Where they need assistance, this would be through their Sage Business Partner. The partner is responsible for having their own processes and procedures to ensure the relevant authority is obtained before making changes.<br><br>Where the customer is directly supported by Sage, we can provide guidance but will not perform this action. If the Customer admin user/customer operations agent t is absent from the business an email from a company director named on companies' house will be required before Sage would make changes.<br><br>We encourage customers to have more than one administrator and more than one operations agent. |
| | Sage 200 Professional (via SPC) | • Partner<br>• Customer Admin<br>• Customer operations agent | In the first instance the customer is responsible for their user maintenance in the Portal. Where they need assistance, this would be through their Sage Business Partner. The partner is responsible for having their own processes and procedures to ensure the relevant authority is obtained before making changes.<br><br>We encourage customers to have more than one administrator and more than one operations agent. |
| Removing customer users from the Sage Provisioning Portal | Sage 200 Standard inc Education | • Partner<br>• Customer Admin<br>• Customer operations agent | In the first instance the customer is responsible for their user maintenance in the Portal. Where they need assistance, this would be through their Sage Business Partner. The partner is responsible for having their own processes and procedures to ensure the relevant authority is obtained before making changes.<br><br>Where the customer is directly supported by Sage, we can provide guidance but will not perform this action. If the Customer admin user/customer operations agent is absent from the business an email from a company director named on |

**Sage**

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|---|---|---|---|
| | | | companies' house will be required before Sage would make changes. We encourage customers to have more than one administrator and more than one operations agent. |
| | Sage 200 Professional (via SPC) | • Partner<br>• Customer Admin | In the first instance the customer is responsible for their user maintenance in the Portal. Where they need assistance, this would be through their Sage Business Partner. The partner is responsible for having their own processes and procedures to ensure the relevant authority is obtained before making changes. We encourage customers to have more than one administrator and more than one operations agent. |
| Changing the customer Admin in the Sage Provisioning Portal | Sage 200 Standard inc Education | • Partner<br>• Customer Admin<br>• Customer operations agent | In the first instance the customer is responsible for their user maintenance in the Portal. Where they need assistance, this would be through their Sage Business Partner. The partner is responsible for having their own processes and procedures to ensure the relevant authority is obtained before making changes. Where the customer is directly supported by Sage, we can provide guidance but will not perform this action. If the Customer admin user/customer operations agent is absent from the business an email from a company director named on companies' house will be required before Sage would make changes. We encourage customers to have more than one administrator. |
| | Sage 200 Professional (via SPC) | • Partner<br>• Customer Admin<br>• Customer operations agent | In the first instance the customer is responsible for their user maintenance in the Portal. Where they need assistance, this would be through their Sage Business Partner. The partner is responsible for having their own processes and procedures to ensure the relevant authority is obtained before making changes. We encourage customers to have more than one administrator and more than one operations agent. |
| Adding an additional customer admin to the Sage Provisioning Portal | Sage 200 Standard inc Education | • Partner<br>• Customer Admin<br>• Customer operations agent | In the first instance the customer is responsible for their user maintenance in the Portal. Where they need assistance, this would be through their Sage Business Partner. The partner is responsible for having their own processes and procedures to ensure the relevant authority is obtained before making changes. Where the customer is directly supported by Sage, we can provide guidance but will not perform this action. If the Customer admin user/customer operations agent is absent from the business an email from a company director named on companies' house will be required before Sage would make changes. We encourage customers to have more than one administrator and more than one operations agent. |
| | Sage 200 Professional (via SPC) | • Partner<br>• Customer Admin<br>• Customer operations agent | In the first instance the customer is responsible for their user maintenance in the Portal. Where they need assistance, this would be through their Sage Business Partner. The partner is responsible for having their own processes and procedures to ensure the relevant authority is obtained before making changes. We encourage customers to have more than one administrator and more than one operations agent. |
| Adding/Removing/Amending Contacts in the Sage CRM systems | For Partners (Any product) | • Sage | Authority required from the current Admin/subscription username or from a director named on companies' house |
| | For Customers (Any product) | • Sage | |

Where there is no Customer user available to make the change, per the grid Sage can process this, subject to the right approval. To do so, please raise a case [online](#) with our Customer Services team.
If you are supported by a Sage Business Partner, they will need to raise the case online.