Sage Software Online User Manual

How to Use This Guide

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Last Modified by David Kries 8/1/2006

How to Use This Guide

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Note:

The Sage Software Online User Manual is best viewed using the latest version of Acrobat Reader. For best printing results, print to a PostScript printer.

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Chapter 1

Introduction

Sage Software Online is a website offered to Customers and Partners of Sage Software, Inc. This website allows you to do the following:

Search for answers to questions about Sage Software products.

Find program fixes, service packs, and support knowledge articles.

Read user manuals, installation guides, year-end tips, and hot issues.

Review your current customer support cases with Sage.

Update your company profile and contact information.

Order Sage products and track sales leads (*Partners only*). (Information regarding how Partners can order products and track sales leads can be found in an FAQ and User Manual.)

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Getting Directly to Sage Software:

The address of Sage Software Online is as follows:

http://www.sagesoftwareonline.com

You can access Sage Software Online by entering the address above into the Location or Address field of a Web browser (such as Internet Explorer, Netscape, Firefox, or Mozilla). Then enter a valid user name and password.

See *Chapter 2, Getting Started*, for instructions on logging into Sage Software Online. You can also access Sage Software Online from the main Sage Software website (www.sagesoftware.com) as described below.

Getting to Sage Software Online from the Main Sage Website:

1. Launch your browser (such as Internet Explorer or Netscape) on your Internet-enabled computer.
2. In the Location or Address field of your web browser, enter the following Uniform Resource Locator (URL) address:

   http://www.sagesoftware.com

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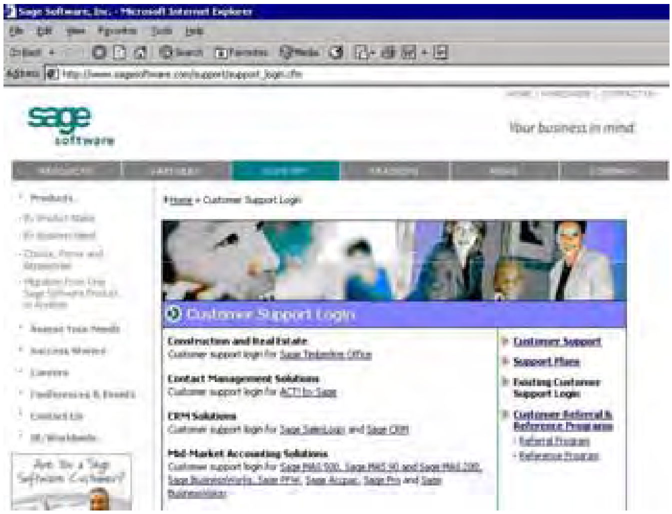
The Sage Software website appears.

3 Click the word Support. The Customer Support Page appears.

4 Click Existing Customer Support Login.
The Customer Support Login page appears.



5 Click one of the product line names. This user manual focuses on the options available under **Mid-Market Accounting Solutions**.

6 The Sage Software Online Login page appears. See page 19 of this manual for instructions on logging in.

7 If desired, you can read the rest of this chapter for some more general information about Sage Software Online and this user manual.

Sage Software Online Problems

If you have Sage Software Online problems or questions that are not addressed in this manual, you can talk to a Sage Software Online analyst by calling **888.282.4195**, or you can send an e-mail to **sageonline.na@sage.com**.

If you send an e-mail message to Sage, you should include your name, company name, Sage account number, browser type, operating system, and other relevant information in the e-mail message.

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Who Can Use Sage Software Online?

Authorized customers, partners, and developers who have a current support agreement with Sage can use Sage Software Online. Upon request, an authorized contact from one of these organizations will be given a valid user name and password. (For more information on getting a user name and password, see *Requesting New Sage Software Online Access* on page 15.)

Software Requirements

In addition to being a current Sage Customer or Partner who is registered to use Sage Software Online, you must have a Windows computer with Internet access, and an Internet web browser application.

Navigating Sage Software Online

If you have experience using the World Wide Web, you are already familiar with the navigation techniques required to use Sage Software Online. For basic Web navigation techniques and browser-specific instructions, select the Help menu of your Web browser.

For the most part, navigation consists of entering the Sage Software Online address into your browser, and then selecting desired Sage Software Online links, channels, and buttons, or entering text into fields, or selecting from drop-down lists.

Links

Sage Software Online uses links (underlined text) to lead you to other web pages, or to download documents and programs. An example of a link is shown below.

When you click it with a mouse or keyboard, the underlined text Product Support Pages takes the Web browser to the Product Support Pages.

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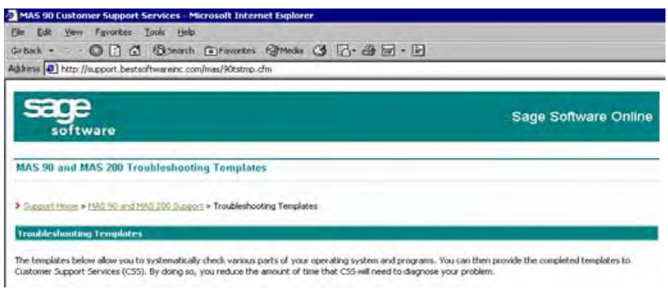
Channels and Breadcrumbs

Clicking on a channel takes the web browser to a particular page (*Home, Contact Sage*, etc.). Channels are almost always available in the *Contents* column at the left side of the Sage Software Online screen. Sage Software Online uses channels to give you a reference point on every screen -- if you get lost on an unfamiliar Sage Software Online page, you can quickly select a channel to return to a familiar page, or logout.

Not all pages have channels. Some pages have points of reference called *breadcrumbs*. Breadcrumbs, as you might expect, leave a trail for you to follow back to your starting point. In the example below, taken from the Troubleshooting Templates page of Sage Software Online, the breadcrumbs are <u>Support Home</u> » <u>MAS 90 and MAS 200 Support</u> » Troubleshooting Templates. Clicking on the words <u>Support Home</u>, or <u>MAS 90 and MAS 200 Support</u>, takes you back to the pages you came from.

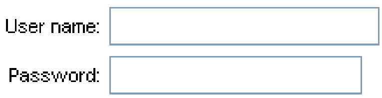


Buttons

Sage Software Online uses buttons to initiate actions. For example, once you have entered a user name and password in the appropriate fields, pressing the Login button shown below allows you to enter certain restricted areas of the Sage Software Online website.

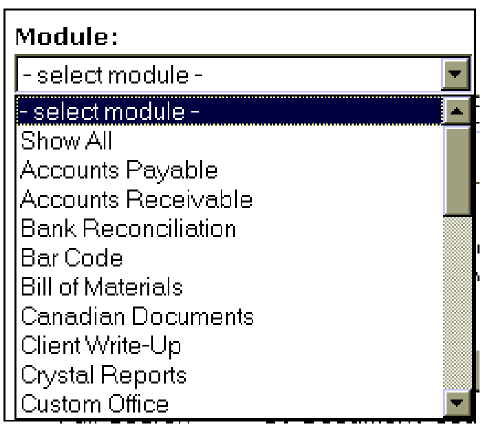
Fields

Sage Software Online uses fields to allow entry of text. For example, the Username and Password fields, as shown below, give you a place to type in your user name and password.



Drop-down lists

Drop-down lists allow you to choose items from a defined list. For example, the drop-down list shown below allows you to specify the accounting software module of interest.



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To learn about logging into Sage Software Online, searching for knowledgebase articles and problem resolutions, downloading program fixes, contacting support, viewing your current support cases and company profile, and other support topics, see the remaining chapters of this manual.

How to Use This Manual

Use this manual as a guide when you first use Sage Software Online, or as a resource when training others to use Sage Software Online. *This manual focuses on the Customer Support portions of Sage Software Online for the Mid-Market Accounting Solutions product lines.*

Support functions include viewing your current support cases with Sage, locating and installing Tax Table Updates, viewing Knowledgebase Articles, loading Program Fixes and Service Packs, using troubleshooting tools, and other support-related offerings.

Disclaimer: The look and feel of the Sage Software Online website will be updated frequently as new support features are added. Therefore, this manual is not intended as an all-inclusive list of the features and links available, and the look of the website may differ from that presented here. Also, this manual does not describe Lead Management, Customer Inquiry, and Sales Order functions of Sage Software Online. These functions are described in the Partner *FAQ* and *User Manual*.

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Graphic Conventions

The following icons in this manual denote different types of information.

The **Note** icon is followed by a brief note with additional information about an option.

The **Tip** icon is followed by a brief tip that suggests a different method for applying a technique or procedure.

The **Warning** icon is followed by a brief warning with important information that could prevent a costly mistakes.

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Chapter 2

Getting Started

To use Sage Software Online, you must be an authorized contact at a company with a support agreement for a Sage Software product.

You also need a *user name* and *password*. If you already have a Sage Software Online user name and password, you can proceed to the section *Logging Into Sage Software Online* on page 19.

If you don't have a Sage Software Online user name and password, the procedure for getting your user name and password is described in the section below, *Requesting New Sage Software Online Access*.

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Types of Sage Software Online Users

Your company can have two types of Sage Software Online users: *Administrative* and *Authorized*. Your *Administrative Contact* is the primary point of contact between your company and Sage. This person has permission to change company information, and add or remove *Authorized Contacts* from your company.

Establish your Administrative Contact by downloading the following form and following the instructions on the form:
http://support.sagesoftwareonline.com/adminenrollmentform.pdf

Requesting New Sage Software Online Access

To request new access to Sage Software Online, follow these steps:

1. Start either Internet Explorer or Netscape (or another Internet browser) on your Internet-enabled computer.
2. In the Location or Address field of your web browser, enter the following Uniform Resource Locator (URL) address:

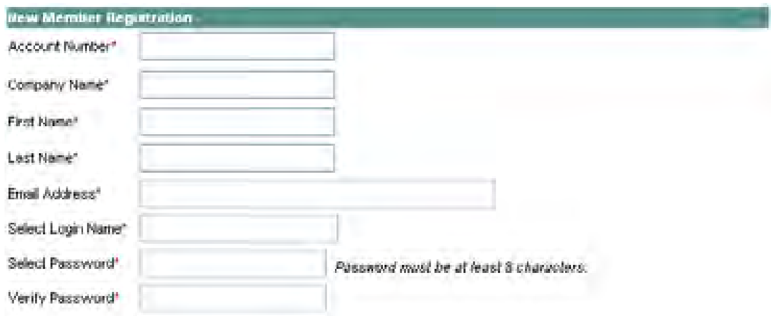
   http://www.sagesoftwareonline.com/

The Sage Software Online Login screen appears. The new user registration link (Register now) is located in the center of the screen, just below the Login button, as shown below.

3 Click Register now. The New Member Registration screen appears.

4 The registration information fields appear on the screen. Use the scroll bar on the right, or press the Page Down key, to view the registration information fields.

Fields marked with a red asterisk are required fields -- you cannot be registered as a Sage Software Online user until you type information into these fields.



5 Fill in the registration information fields, as described below:

Account Number — Type the Sage account number for your company. When you become a customer of Sage, you receive this account number. You can find the account number on the packing slip of your Sage product package.

Company Name — Type your company name.

Note
If the contact name is not known to Sage, this person will not be given access to Sage Software Online.

First Name — Type the first name of the person at your company who is authorized to contact Sage. Your company must provide this person's name to Sage Software as an authorized contact, before he or she can log into Sage Software Online.

Last Name — Type the last name of the person at your company who is authorized to contact Sage. Your company must provide this person's name to Sage Software as an authorized contact.

Email Address — Enter your e-mail address in the Email Address field.

Select Login Name — Choose a user name of up to 20 characters, and type this user name into the Select Login Name field. You will use this user name to log into Sage Software Online during future sessions.

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Select Password — Choose a password of at least 8 characters, and up to 20 characters. Type this password into the Password field. You will use this password to log into Sage Software Online during future sessions.

Verify Password — Type the same password as the one you typed into the Select Password field. This field ensures that you have not mis-typed your password.

6 If you see a set of checkboxes at the bottom of the New User Registration page, you can use these to subscribe to CS e-mail lists. If you do *not* see the checkboxes, or do not wish to sign up for an e-mail list at this time, you can always sign up for e-mail at a later date. See Chapter 6, *Subscribing to an E-Mail List*, for instructions.

7 To send your new request for access to Sage Software Online, click the Register button.

If you have a valid current support agreement that allows access to Sage Software Online, your request for access is instantly processed and your browser is directed to the Sage Software Online login screen.

If you have typed an invalid Account Number, or the entries in the Select Password and Verify Password field do not match, you will see an error message:

- The message "The passwords you have entered do not match" indicates a password mismatch. Click OK, retype both passwords, and click the Continue button again.
- The message "The account number you have entered is not valid" indicates a bad account number. Click OK and retype a valid Account Number, then click the Continue button again.

After entering valid account information and clicking Continue, you will be directed to the Sage Software Online Login screen. You can then log into Sage Software Online following the procedures in the next section, *Logging Into Sage Software Online*.

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Logging Into Sage Software Online

With a Sage Software Online user name and password, you can follow the procedure below to log into Sage Software Online:

1 Start either Internet Explorer or Netscape.

2 In the Location or Address field of your browser, enter this URL:

http://www.sagesoftwareonline.com/

The Sage Software Online Login screen appears.

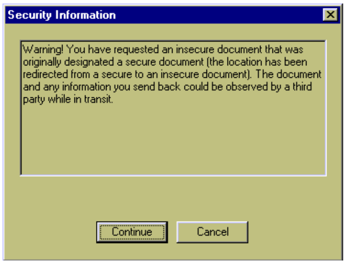
3 In the Username and Password fields, enter your assigned user name and password combination.

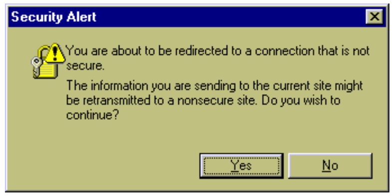
TIP Select the Remember my username box to automatically fill in your password when you next start Sage

4 Press the Login button.

(The following message might appear: "Invalid username and/or password." If so, double-check, and re-enter your user name and password. Click the Login button again. If you have lost your password, see the section *Retrieving a Lost Password* on page 23.)

You might see one of the following security warnings:





5 If a security warning appears, clear the security warning. Click Continue or respond Yes to the Do you wish to continue prompt. (The security warning is a function of the browser, rather than a feature of Sage Software Online.)

If this is your first time logging into Sage Software Online, the Sage Non-Disclosure Agreement appears. (This Non-Disclosure Agreement does not appear on subsequent logins. If this is not your first time logging in, you are directed to the Sage Welcome screen, shown after the next step.)

6 If you are logging in for the first time, you must scroll down to the bottom of the non-disclosure agreement and click the I Agree button. (If you click the I Disagree button, you return to the Login screen.)

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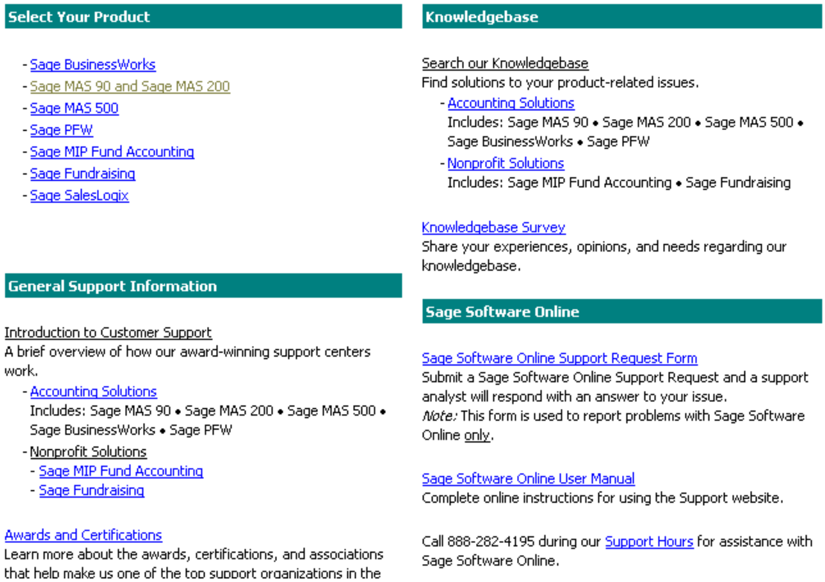
The Sage Software Online welcome screen appears.

Note
See the Partner User Manual and FAQs for more information on quotes, orders, and partner self-service.

If you are a Sage Software Partner, you can use Sage Software Online to create quotes and orders. Those functions are not described in this manual; instead, they are described in the *Partner User Manual* (http://www.sagesoftwareonline.com/eservices/Support/pssum.pdf) and *FAQs* (http://www.sagesoftwareonline.com/eservices/Support/SSO_Partners_FAQ.pdf).

7 Clicking the Support link, located on the Menu bar near the top of the screen, will take you to the Customer Support page (shown below).



The Case Inquiry link shown above takes you to the Support Case Inquiry pages described in Chapter 6 on page 59, *Viewing Support Cases and Changing Profiles.*

From the Customer Support page, you can select the product line for which you are looking for support information.

8 Select your Sage product line name.

Once you click the Support links on this page, you can begin using Sage Software Online to search for articles about Sage products and resolutions to problems, download programs and fixes, ask support questions, or visit Sage discussion forums. See the remaining chapters of this manual for procedures on using the Sage Software Online support pages.

Retrieving a Lost Password

If you already have a Sage Software Online password but have forgotten your password, you can retrieve it through Sage Software Online by following these steps:

1 In the Location or Address field of your browser, enter this URL:

http://www.sagesoftwareonline.com/

The Sage Software Online Login screen appears.

2 Under the Username and Password fields, note the words *Forgot your user name and password*. To the right of these words is a link *Let us know*. Select the *Let us know* link.

The Username/Password Retrieval screen appears.

3 Fill in the company information fields:

4 To send your request to find a missing login username or password, click the Continue button.

If you have a valid current support agreement that allows access to Sage Software Online, your request for a lost password or username is instantly processed and your browser is directed to the Sage Software Online login screen.

5 Check your e-mail inbox for a new e-mail from Sage Software Inc. This e-mail will contain your missing username and password.

6 Use the username and password mailed to you by Sage to login to Sage Software Online following the procedures in the section *Logging Into Sage Software Online* on page 19.

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Chapter 3
Searching for Knowledgebase Articles

Sage Software Online gives you access to thousands of Knowledgebase Articles. These articles contain important information about using Sage products, or solutions to common problems encountered by users. When an end user calls CS with a software or computer problem, the CS analyst who solves the problem also enters the solution into the database of Knowledgebase Articles.

Other types of documents and programs available to you on Sage Software Online include program fixes or patch files, tax table update files (TTUs), installation and user manuals, and compatibility charts. These types of Sage Software Online documents and programs are discussed in Chapter 4.

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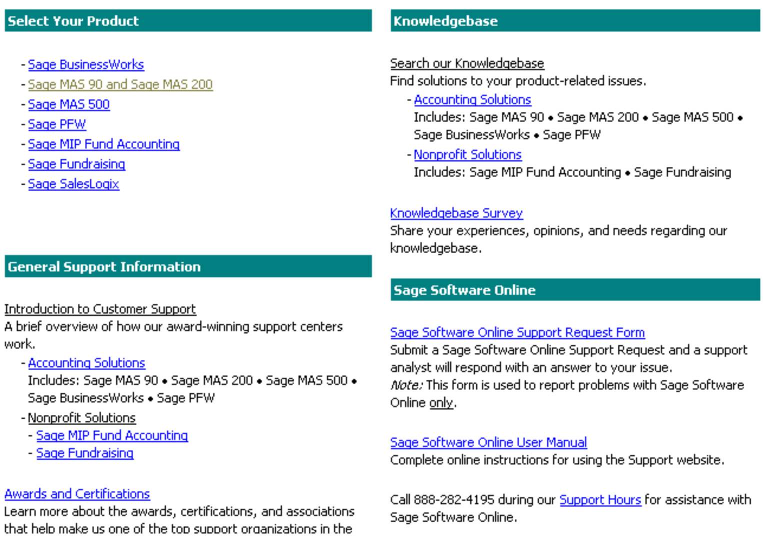
Where to Begin

To begin searching for Knowledgebase Articles, login to Sage Software Online as described in *Logging Into Sage Software Online* in Chapter 2.

As described in Chapter 2, you can choose the product line of interest from the Support page, or you can start from the main support page, shown below, by clicking the *Search Our Knowledgebase* link.



Searching the Knowledgebase

The Knowledgebase can help you find the answer to your question by consulting a knowledgebase and showing you some recommended solutions to your question. Asking a single question and finding the answer to it is called a *knowledge session*.

To work through a knowledge session, follow these steps:

1 Click the Knowledgebase link shown on the previous page, then click the link that corresponds to your product line.

The Knowledgebase, shown below, appears.

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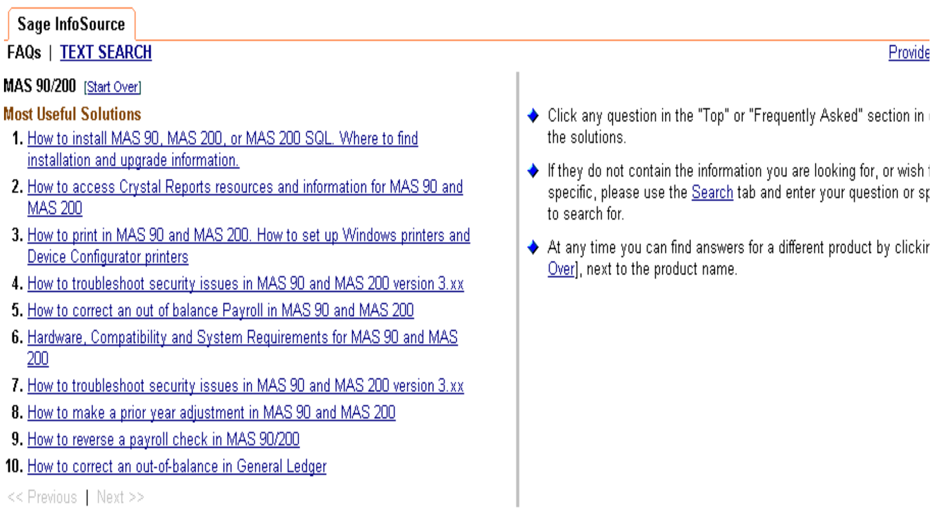

2 The Most Frequently Asked Questions for the selected product line are displayed in the left pane of the page. Click any of these to display the solution, which appears in the right pane of the page. Alternatively, you can click [Start Over] to select another product line, or if you wish to be more specific, click TEXT SEARCH to enter your question or specific words to search for.

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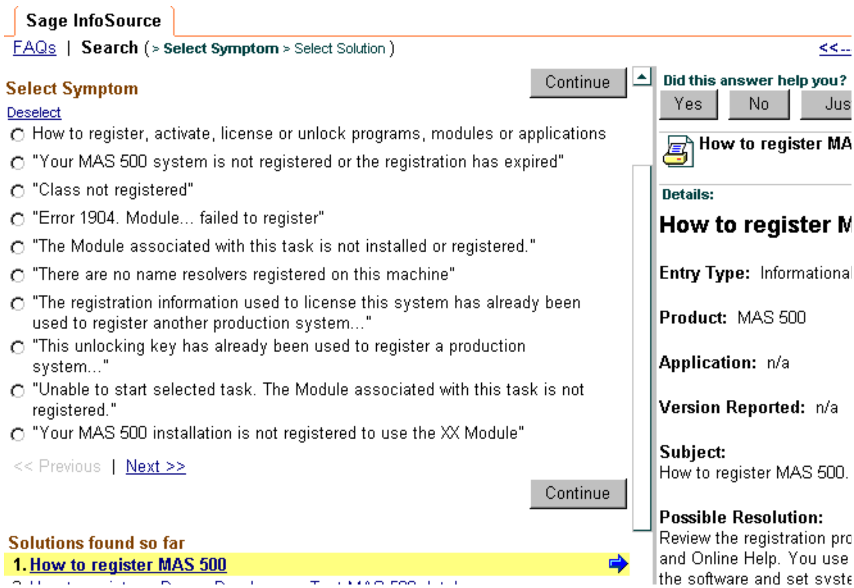
3 For the TEXT SEARCH, enter your problem or question using specific keywords and phrases. Optionally, you can also enter an application to filter the search.

4 A list of related topics is displayed so that you can give additional information the knowledgebase needs to find specific answers in the knowledgebase, as shown below. Scroll down the page to view a list of applicable solutions, if any.



5 Select the check box next to the item that is most closely related to your question, and click *Continue,* or scroll down the page and select one of the displayed solutions.

Or, if none of the topics seem relevant, you can reword your question and then click *Refine* to repeat this step and produce a new list of related topics.

The Knowledgebase displays a new page in the right pane, shown below, containing a detailed description of the answer.

The Knowledgebase displays a new page containing a detailed description of the answer. Read the answer, using the scroll bar if necessary.

The attachments section of the page might contain downloadable programs or documents that will assist you in implementing the recommended solution. You can click the underlined links to download the programs or documents.

At the upper right of the details page is a prompt asking if this answer helped you. If the answer seems right for you, you can end your knowledge session by filling out a feedback form to indicate whether you are satisfied with the answer you found.

Also in the upper right of the details page is an Engineering Status link, which launches a page detailing the status of the correction of the issue, if applicable (for example, "will be fixed in the next Service Pack").

If you don't find the answer to your question, you can return to the answer page and make a different selection by clicking the *Start Over* link.

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After a period of inactivity, your knowledge session will time out and a message will be displayed. (The timeout interval is set by your system administrator.) You can click the *Re-login* link in the message to continue working with the Knowledgebase; however, any information you had entered before your session timed out is discarded.You might have to log in again to start a new session.

To get more information about an item in the results list, do one or more of the following:

1. Position your cursor over the item; a short description appears to its right.

2. Click the item in the results list. A details page is displayed, containing a longer description of the item and a list of any *attachments* associated with it. Attachments are resources outside the knowledgebase -- text files, graphics, spreadsheets, links to Web sites, and so on -- that provide additional information pertinent to the item.

3. Click the name of an attachment on the details page. The attachment is opened in a new window, using an appropriate program. For example, a text file attachment is opened with a word processing program, and a link to a Web site is opened in a browser.

Clicking on a Solution

1. Read the long description and open any attachments that may be helpful in understanding the solution. At the top right of the page is a prompt asking whether this answer helped you.

2. If this solution is correct, click *Yes*. The Knowledgebase displays a feedback form where you can indicate whether you are satisfied with the answer you found.

3. After completing the form, click *Submit* to complete your knowledge session.

If this solution is not correct, click *No,* and the next applicable solution's details will appear in the right pane.

Refining Your Question

You may not find the answer to your question on the first results list presented to you. Perhaps your question was worded too broadly, producing a results list that covers a wide range of topics. If that is the case, you can provide more specific information and let the Knowledgebase try again.

To supply additional information:

1 On the results page, scroll down to the bottom of the page and choose a particular application.

2 Click *Continue* to produce a new results list.

If refining your question still does not give you a suitable answer, you can click *Start Over* to discard the current knowledge session and start a new one.

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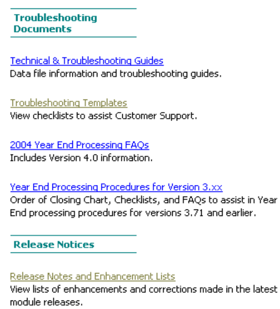
Viewing Software Release Notices

Software Release Notices describe the version numbers of Sage software products, the enhancements and corrections made in a particular version, and the date that the product was made available. For example, to view MAS 90 Release Notices, go to the MAS 90 and MAS 200 Support page, and click the link Release Notes and Enhancement Lists.



You can click down into the Release Notes by module and by release version. Then follow the breadcrumbs back to the MAS 90 and MAS 200 Support page.

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Chapter 4

Downloading Programs and Documents

In addition to Knowledgebase Articles, Sage Software Online offers a library of downloadable documents and installable programs. These fall into the following categories:

Service Packs or Updates — These software programs can be used to update your installed Sage product.

Program Fixes — These include a description of a software problem and often include a downloadable program file. You can use the program file to update the Sage software installed at your site and correct the problem. If no downloadable file is available, the tip might contain workarounds or code changes that fix the problem.

Tax Table Updates (TTUs) — As federal and state tax rates change, Sage updates the corresponding software data files and posts them on Sage Software Online. You can then use the downloadable files to update the tax tables in your Sage software accounting system.

User Manuals and Installation Guides — Sage Software Online gives you access to the same installation guides and user manuals that ship along with Sage software products. If you have lost your printed manuals or need additional copies for other users, use this feature.

Current Release Level Charts — These documents show the version numbers of the latest releases of Sage's accounting software modules.

Troubleshooting Templates — Through this link, you can access a set of Sage troubleshooting templates in Microsoft Word format. Fill out these templates with your system configuration and send them to Sage CS to expedite the resolution of your particular problem.

Miscellaneous Downloads — By request, CS sometimes makes available to its customers certain general purpose utility programs. You can download these useful programs from this area of Sage Software Online.

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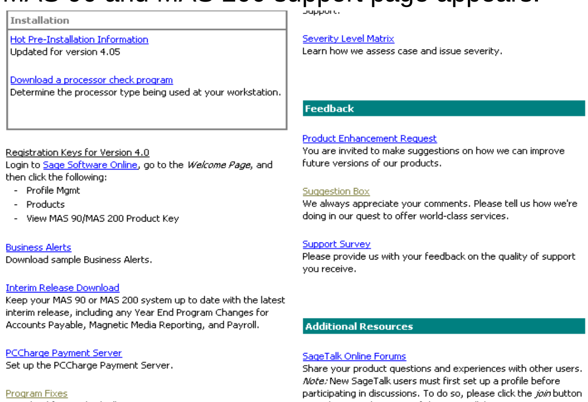
Where to Begin

To begin reading documents and downloading programs, follow these steps:

1. Login to Sage Software Online as described in *Logging Into Sage Software Online* in *Chapter 2*.

2. Click into a product-specific support page. For example, choose the MAS 90 and MAS 200 support page.

   The MAS 90 and MAS 200 support page appears.



3. The links in each product-specific support page are subject to change, and might not match the links displayed in the screen shown above. These links change as new issues arise. Below is a brief description of the general link types:

   Year End Processing — Through these links, you can access helpful hints and news regarding year-end processing procedures.

   Service Pack and Update Downloads — Through these links, you can access program updates and fixes.

   Installation Guides and User Manuals — Use these links to access user manuals and installation guides. These manuals and guides are usually in Adobe Acrobat Portable Document File (PDF) format. To read PDF documents, you must first install the free Acrobat Reader program. You can install Acrobat Reader by clicking the Get Acrobat Reader icon.

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Pre-Installation Hot Issues — Use these links to get information about setting up your system prior to installing Sage software products.

Release Notices — Through these links, you can get information about the latest Sage software releases.

Technical and Troubleshooting Guide — Use these links to access helpful troubleshooting utilities and guides, including data file layouts, Frequently Asked Questions (FAQ's), and other troubleshooting documentation.

Troubleshooting Templates — Through this link, you can access a set of Sage troubleshooting templates in Microsoft Word format. Fill out these templates with your system configuration and send them to Sage CS to expedite the resolution of your particular problem.

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Installing Acrobat Reader

The TRSGs, installation guides, and user manuals available through Sage Software Online are in Adobe's Acrobat PDF format. To make the most of Sage Software Online, you should install the Acrobat Reader program on your computer.

Sage recommends that you install Acrobat Reader version 4.x or higher. Older Acrobat versions, such as 3.x, might have incompatibilities with the newest releases of Internet browser software such as Internet Explorer and Netscape Communicator. These older versions of Acrobat Reader might not be able to display the Sage Software Online PDF manuals reliably.

Acrobat Reader is free to download from Adobe's website at http://www.adobe.com/products/acrobat/readstep2.html.

To install the Acrobat Reader, follow these steps:

1. You can install Acrobat Reader from anywhere that you see the Get Acrobat Reader icon or an Install Acrobat Reader link. For example, click the Download Acrobat Reader link on the MAS 90 and MAS 200 support page.

2. Click the Get Acrobat Reader icon.

   You are taken to Adobe's Acrobat Reader download page.

3. Follow the on-screen instructions for installing the latest version of the Acrobat Reader.

   After you have installed Acrobat Reader on your computer, Acrobat Reader will open any PDF-format document that you click on while using Sage Software Online. You will be able to page up and page down through the PDF document, print the document, and search the document.

Viewing Year End Processing Tips

The arrival of December 31 means the end of the fiscal year. Closing the fiscal year requires actions such as backing up data, making adjusting entries, deleting terminated employees, updating tax tables, and the printing of W-2s, 1099s, and other forms. CS offers various tips and hints for using Sage software to help you close your fiscal year.

As with other links on the Sage Software Online web site, the Year End Processing link is not necessarily available for all product lines, and the wording of the links is subject to change.

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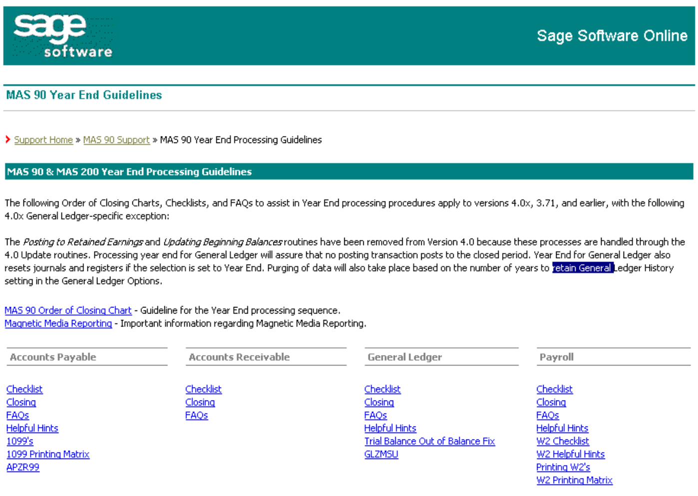
To view year-end processing procedures, follow these steps:

1 From a product-specific support page, click the link containing the words Year End. For example, on the MAS 90 and MAS 200 support page, click the Year End Processing Procedures link.

2 If you have not yet installed Acrobat Reader, install it now. See the instructions in the *Installing Acrobat Reader* section. When Acrobat is installed, continue with these instructions.

3 The MAS 90 Year End Processing Guidelines document appears. Because this is a PDF format document, the guidelines document is loaded into the Acrobat Reader interface.



4 Click on topics of interest in the MAS 90 Year End Processing Guidelines document. You will jump to page that contains the topic.

5 To return to Sage Software Online, use the Back button or command.

Downloading Program Fixes and Updates

Sage Software Online offers a wide range of program fix files for various modules and product lines. This section gives instructions for a typical procedure where a Sage Software Online user searches for a program fix file, locates it, and downloads and installs the fix file onto his local Sage software system.

Various Sage product lines offer program update or program fix files:

- The Program Fixes pages usually have a link to an update program that fixes the problem described. The update program is usually in the form of a self-extracting executable that, once saved to a personal computer from the Sage Software Online website, can be run to correct or upgrade an existing installed Sage product.
- Some products have a Service Pack & Update Downloads link that leads to a set of program upgrades in the form of self-extracting executable files. The service pack files tend to be large, so avoid initiating downloads from a workstation with limited disk space or Internet connection speed.
- Some products offer a trial version of the entire program. These trial versions are also self-extracting executable files. The trial versions tend to be large, so avoid initiating downloads from a workstation with limited disk space or Internet connection speed.

The example given in the step-by-step procedures below is a MAS 90 Program Fix with a self-extracting executable file. The procedures are similar to the procedures for downloading self-extracting executable files for other Sage product lines. Instead of presenting examples of every type of interaction on Sage Software Online, this manual presents one representative example of this download procedure. Refer to this procedure for general information about this procedure.

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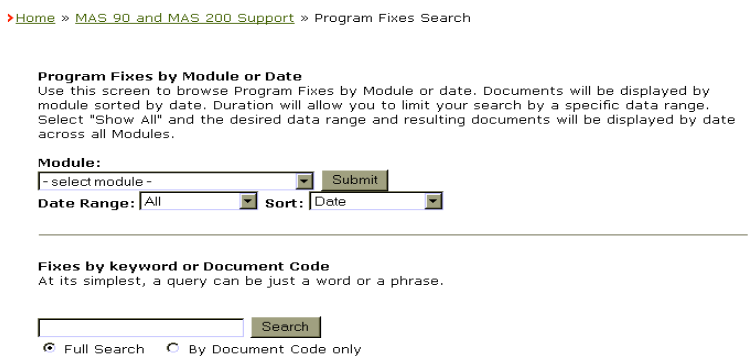
To view a Program Fix and download the associated program, follow these steps:

1 From a product-specific support page, locate the link that leads to the program fix or download. In this example, assume that you want to select MAS 90 and MAS 200 Program Fixes (Support Tips). Click Program Fixes link from the MAS 90 and MAS 200 support page.

2 After you click the MAS 90 and MAS 200 Program Fixes link, the Program Fix locator screen appears. This page has program fix collections listed at the top, and search fields at the bottom. Two search techniques are available on this screen: the top search fields with the Submit button locate Program Fixes based on a specified module and date; the bottom search field and Search button locate Program Fixes based on a keyword or document number.

In the following example, the top search fields are used.



3 From the Module pull-down menu, select the name of the module of interest. For example, select General Ledger.

4 From the Date Range pull-down menu, select the date range during which the Program Fix was made available. Set the pull-down to Past 14 Days to see Program Fixes which were posted in the last two weeks, or select Past 30 Days, Past 2 Months, Past 3 Months, or Past 6 Months to view Program Fixes posted in these date ranges. Select All to produce a list of all Program Fixes.

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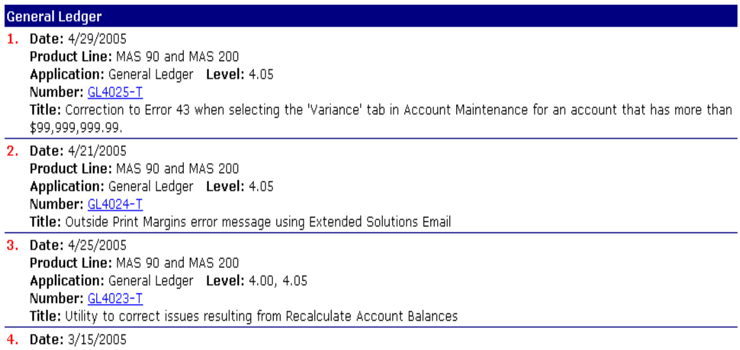
5 From the Sort pull-down menu, select Date to sort the retrieved Program Fixes by date of posting, or select Document Code to sort the Program Fixes by Number.

6 To retrieve a list of Program Fixes, click the Submit button.

A list of qualified Program Fixes appears.


General Ledger

1. **Date:** 4/29/2005
Product Line: MAS 90 and MAS 200
Application: General Ledger **Level:** 4.05
Number: GL4025-T
Title: Correction to Error 43 when selecting the 'Variance' tab in Account Maintenance for an account that has more than $99,999,999.99.

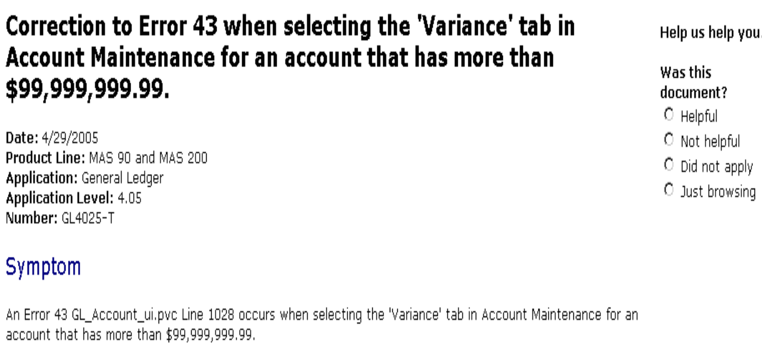
2. **Date:** 4/21/2005
Product Line: MAS 90 and MAS 200
Application: General Ledger **Level:** 4.05
Number: GL4024-T
Title: Outside Print Margins error message using Extended Solutions Email

3. **Date:** 4/25/2005
Product Line: MAS 90 and MAS 200
Application: General Ledger **Level:** 4.00, 4.05
Number: GL4023-T
Title: Utility to correct issues resulting from Recalculate Account Balances

4. **Date:** 3/15/2005

7 Scroll down to view the list of Program Fixes. When you see a Program Fix of interest, click on the Program Fix Number. For example, click General Ledger Program Fix 4025 (Number GL4025-T).

The body of the Program Fix appears.


Correction to Error 43 when selecting the 'Variance' tab in Account Maintenance for an account that has more than $99,999,999.99.

Date: 4/29/2005
Product Line: MAS 90 and MAS 200
Application: General Ledger
Application Level: 4.05
Number: GL4025-T

Symptom

An Error 43 GL_Account_ui.pvc Line 1028 occurs when selecting the 'Variance' tab in Account Maintenance for an account that has more than $99,999,999.99.

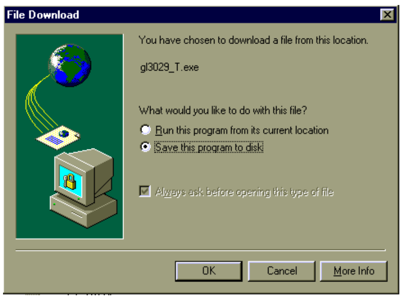
Help us help you.

Was this document?
- Helpful
- Not helpful
- Did not apply
- Just browsing

8 Press Page Down to read the entire Program Fix. If a link is available under the Download heading, you can download a program update file to fix the problem described in the Program Fix.

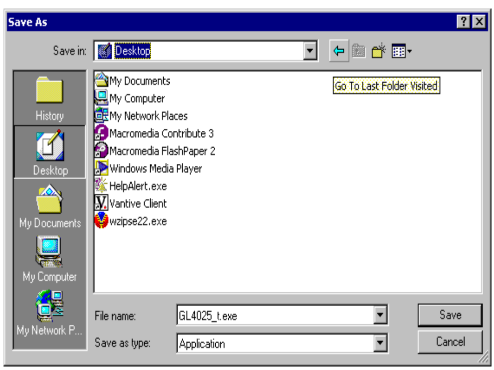
9 Click the link under the heading Download. For example, click gl4025_T.exe.

If you are using Internet Explorer, a File Download dialog box appears. (A Netscape browser might display a similar dialog box, or it might automatically download the entire file, skipping the next three steps below.)



10 If prompted to save the program update file to your computer, click the OK button in the File Download dialog box. Netscape users might not see this prompt.

The Save As dialog box appears.



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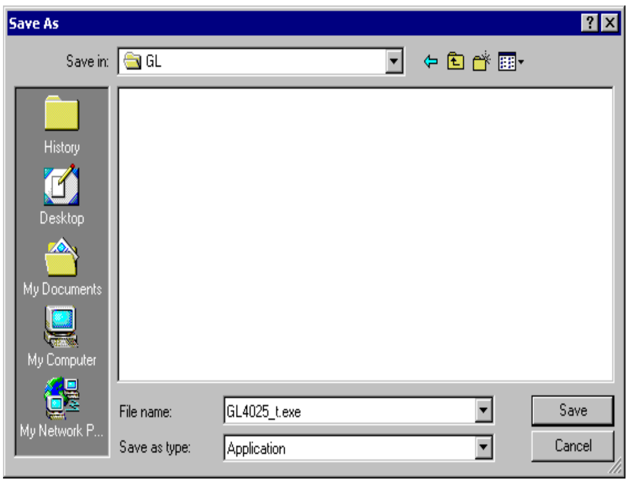
11 If prompted, specify a location on your computer where you want to download the file. Netscape users might not see this prompt.

12 Click Save. Netscape users might not see this prompt.

13 Once the program update file (gl4025_t.exe, in this example) is saved on your computer, you run the program update executable file to install the program update to your local installation. Look for on-screen instructions.

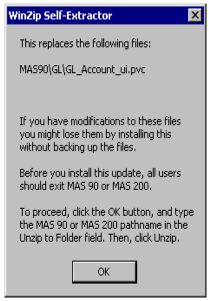
14 In this example, the first step in upgrading your MAS 90 program with the program update is to start Windows Explorer.

15 Use Windows Explorer to locate the newly downloaded file.

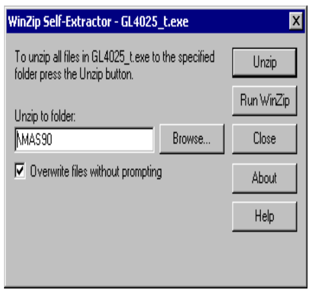


16 To extract the program update files, double-click the newly downloaded file (gl4025_t.exe, in this example).

17 The program update files with MAS 90 Program Fixes are usually Windows-based self-extracting executables that prompt you for the path of your MAS 90 installation and automatically install the fix, as shown below. Click OK in response to the following prompt.



18 If the following prompt appears, enter the folder location of your MAS 90 installation in the Unzip to Folder field and click Unzip.



This completes the installation of the downloadable file.

The instructions given above are an example of one way to read and download files from the MAS 90 Program Fixes section. Downloadable files are also found in the Knowledgebase Articles, Technical and Troubleshooting Guides, Tax Table Updates, and other sections.

In general, save the downloadable file to your Sage accounting software directory. Run the self-extracting executable file. Then, view the Readme or text file that accompanied the download for further instructions on using the files.

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Reading Installation Guides and User Manuals

Installation guides and user manuals are usually in PDF format. To read PDF documents, you must first install the free Acrobat Reader program. See the instructions in the section *Installing Acrobat Reader.*

To view installation guides and user manuals, follow these steps:

1 From the product-specific support page that corresponds to your Sage accounting software product, click the link containing the words Installation Guides, User Manuals, or Online Manuals. Note that not all product lines have a user guides or manuals link. For example, on the MAS 90 and MAS 200 support page, click the Online Manuals link.

2 A page appears, with sections for each recent version of MAS 90 and MAS 200. Note that as of version 4.00, User Manuals have been placed online in help file format.

To view one of the installation guides or user manuals listed on this page, click the name of the installation guide or user manual. For example, click the Installation Guides/User Manuals link under the Version 3.71 section.

The Version 3.71 Installation Guide/User Manual for MAS 90 and MAS 200 appears inside the Acrobat Reader program.

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3 To view one of the installation guides or user manuals listed in the master document, click the name of the installation guide or user manual. For example, to view the General Ledger user manual, click General Ledger.

4 The General Ledger online user manual appears in an Acrobat Reader window.

5 Click on one of the links presented. For example, click on Contents to see a list of topics organized by heading within the manual, or click on Index to see an alphabetical list of topics within the manual. You can click on page numbers in the Index or Contents to jump to that page of the manual.

6 To return to Sage Software Online, exit the Acrobat Reader, or if you are viewing the Acrobat Reader within the browser window, use the Back button or command.

Reading Pre-Installation Hot Issues

Through these links, you can get information about setting up your system prior to installing Sage software products.

To view pre-installation issues, follow these steps:

1 From the product-specific support page that corresponds to your Sage accounting software product, click the link containing the words Pre-Installation. Note that not all product lines have a Pre-Installation link. For example, on the MAS 90 and MAS 90 product-specific support page, click the Pre-Installation Hot Issues link.

The Pre-Installation Hot Issues screen appears.

2 If you have not yet installed Acrobat Reader, do it now. See the instructions in the *Installing Acrobat Reader* section.

3 Press Page Down to view the Pre-Installation Issues for your Sage product.

4 To return to the main page, use the Back button or command.

Using the Technical Reference and Support Guides

Through the Technical Reference and Support Guide links, you can access the Technical Reference and Support Guides (TRSGs), technical support manuals with troubleshooting, error message, installation, and data file format and repair information for BusinessWorks or MAS 90 and MAS 200.

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The TRSGs are also available on CD. If you purchase a Sage product that has a TRSG associated with it, such as a BusinessWorks or MAS 90 or MAS 200 product, you might have a locally-installable version of the TRSG on a separate CD. This manual describes accessing a TRSG from Sage Software Online, rather than installing the TRSG from CD.

If you have not yet installed Acrobat Reader, do it now. See the instructions in the *Installing Acrobat Reader* section. You need Acrobat Reader on your computer to view a TRSG.

To view a TRSG, follow these steps:

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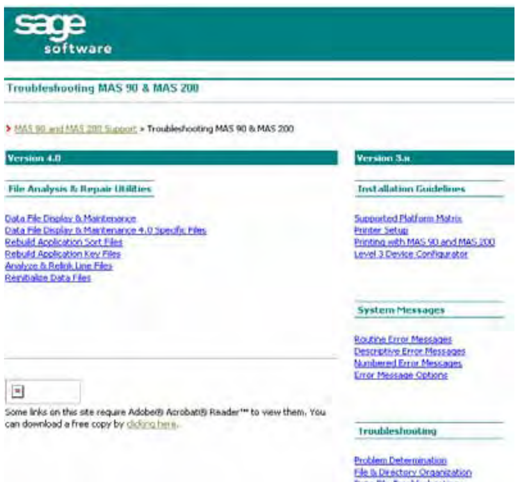
1 From the product-specific support page that corresponds to your Sage accounting software product, click the link containing the TRSG acronym located in the Menu bar near the top of the page. Note that not all product lines have a TRSG link. For example, on the MAS 90 and MAS 90 product-specific support page, click the Technical and Troubleshooting Guides link.

   The Technical and Troubleshooting Guides screen appears.

2 Click the Troubleshooting link. The following screen appears.



3 Click on one of the many helpful links on the Troubleshooting page. For example, to obtain details on how to access and maintain MAS 90 and MAS 200 Data Files, click the Data File Display and Maintenance link. To return to Sage Software Online, use the Back button or command.

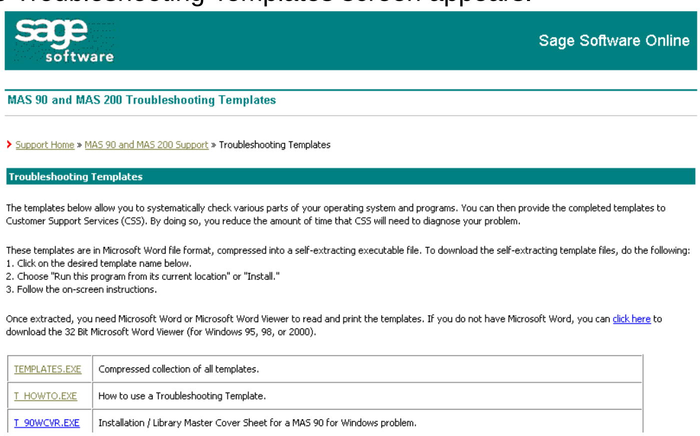
Using Troubleshooting Templates

Through the Troubleshooting Templates link, you can access a set of Sage troubleshooting templates in Microsoft Word format. Fill out these templates with your system configuration and other information, and send them to Sage CS to expedite the resolution of your particular problem.

To use Troubleshooting Templates, follow these steps:

1 From the product-specific support page that corresponds to your Sage accounting software product, click the link containing the words Troubleshooting Templates. Note that not all product lines have a Troubleshooting Templates link. For example, on the MAS 90 and MAS 200 support page, click the Troubleshooting Templates link.

The Troubleshooting Templates screen appears.

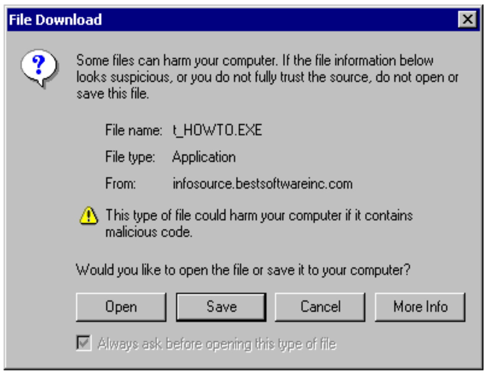


2 Press Page Down to view a list of the available troubleshooting templates. The Templates shown are Word documents compressed into self-extracting executable files.

3 If you have a version of Microsoft Word installed on your computer, go to the next step. If you do not have Microsoft Word, click on one of the Microsoft Word Viewer links. Follow the on-screen instructions to download one of the Word Viewer programs from the Microsoft website. (The 32-bit viewer is a higher-performance program but requires more computer resources and a newer version of the operating system.)

4 Choose one of the templates to download and use by clicking on the template name. For example, click on T_HOWTO.EXE to download the self-extracting executable file that contains all of the Word troubleshooting templates.

A File Download dialog box appears.



5 Click Save.

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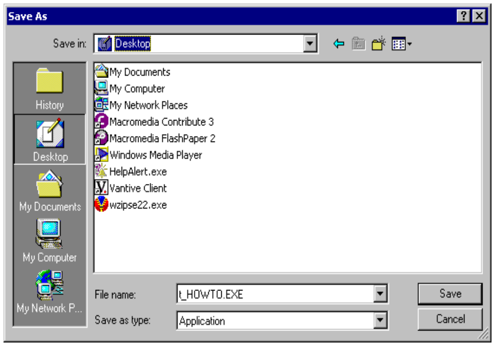
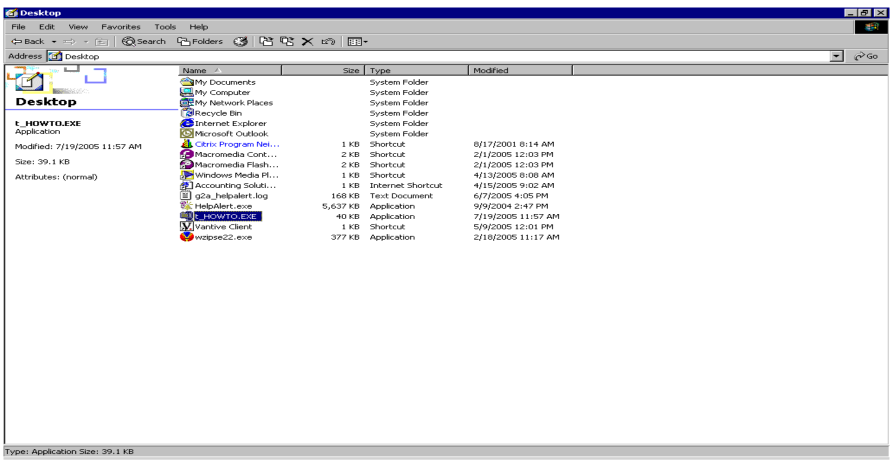
The Save As dialog box appears.



6 Choose Save to save the file to your local hard disk.

7 When the download is complete, start Windows Explorer from the Start menu.

8 Locate the saved file with Windows Explorer.



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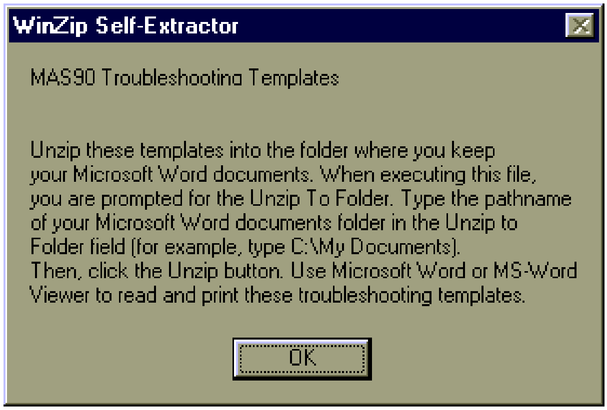
9 Open the file with Windows Explorer by double-clicking on the file name (T_HOWTO.EXE).

A WinZip Self-Extractor message appears.



10 Read and follow the on-screen instructions.

11 Start Microsoft Word or Microsoft Word Viewer and open one of the extracted Troubleshooting Templates. Print out the Troubleshooting Template.

12 Read the Template and fill in the blanks as indicated. Have the Template nearby when you call Sage CS. Your Sage CS analyst will be better able to assist you if you have the Template completed. If you have Microsoft Word, rather than the Viewer, you can type your answers into the Template and e-mail the template to a CS analyst to assist in the problem resolution.

13 Exit Microsoft Word or Microsoft Word Viewer.

14 To return to Sage Software Online, use the Back button or command within your browser.

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Chapter 5

Contacting Support

Through Sage Software Online, you can send questions regarding problems with Sage software products to Sage Customer Support (CS) via the Internet. You enter information about your problem into an online questionnaire, and submit your support request to Sage CS. Within hours, you will receive an e-mail resolution to your problem, or a phone call from a Sage CS analyst if more information is required. Contacting CS through Sage Software Online saves you the time you would normally spend on the telephone waiting to talk to a CS analyst.

You can also request a product enhancement through Sage Software Online. If you have an idea for an improvement in the functionality of a Sage accounting product, this is a way to let Sage know. If possible, Sage will include your suggested enhancement in a future release of the Sage product.

You can also submit feedback regarding the service that CS is giving to Sage customers. And, if you decide to make a telephone call to CS, you can also use the Contacting Support section of Sage Software Online to view a list of CS phone numbers.

Finally, after you open a support case with CS, you can view the progress and status of that support case through Sage Software Online, as described in *Viewing Your Support Cases and Company Profile* in Chapter 6.

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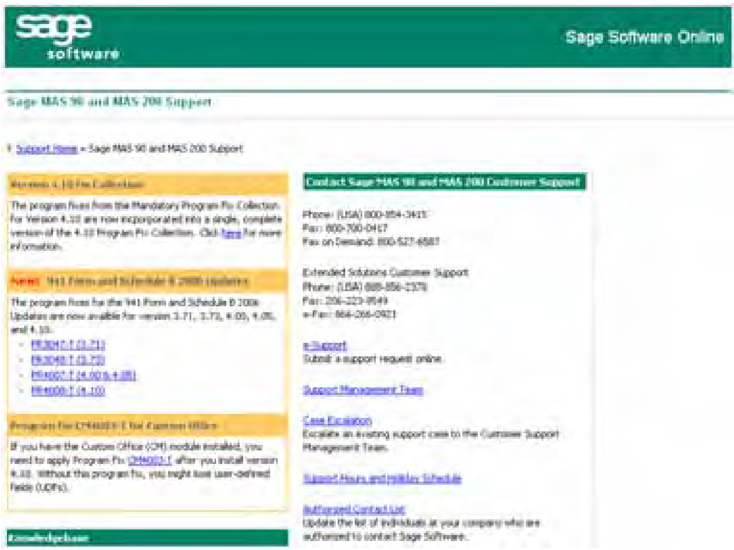
Asking A Support Question

To contact support, follow these steps:

1 Login to Sage Software Online and choose a product-specific support page as described in *Logging Into Sage Software Online* in Chapter 2. For example, choose the MAS 90 and MAS 200 Support link.

The MAS 90 and MAS 200 support page appears.



2 Click the <u>MAS 90 and MAS 200 e-Support</u> link.

A form appears with the choices Customer and Self. If you're a reseller and you're requesting support for one of your MAS customers, choose "Customer."

or

If you're requesting support for your own MAS installation, choose "Self."

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The Create a Web Case form appears.

3 Type information into the fields presented on the Create a Web Case form. Some fields are required; the support request cannot be processed without information in these fields. Required fields are marked by either red field names or red asterisks.

4 Continue entering text in the lower fields and review your entries.

5 When you reach the Submit button, click Submit to send your question to CS. Within hours, you should receive either an e-mail with a response to your support request or a phone call from a CS analyst if more information is required to answer your support request.

6 To return to Sage Software Online, use the Back button or command.

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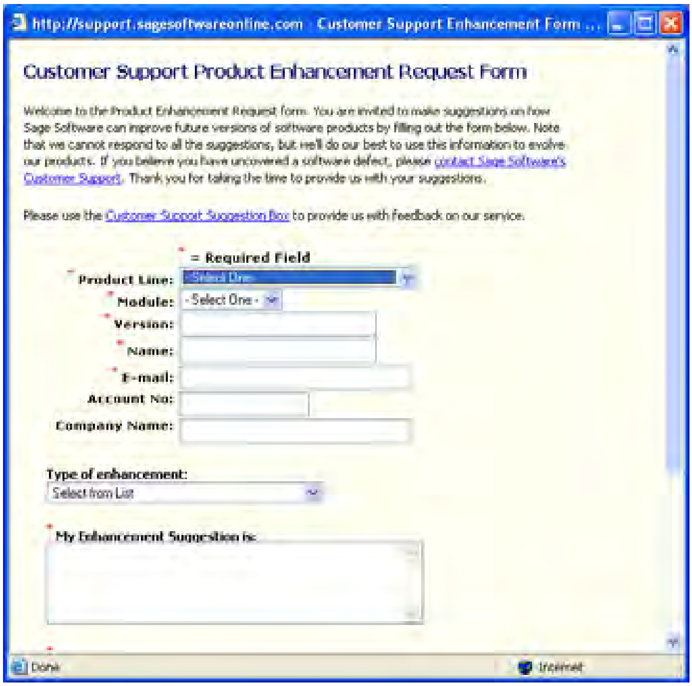
Suggesting an Enhancement

To suggest an enhancement to a Sage software product, follow these steps:

1. From a product-specific support page, scroll down until you can see the Feedback links on the right side of the page.
2. Click the link Product Enhancement Request.

   The Product Enhancement Request screen appears.



3. Type your information into the fields presented on the Product Enhancement Request form. Some fields are required; the Product Enhancement Request cannot be processed without information in these fields. Required fields are marked by red asterisks.
4. Continue entering text in the lower fields on the page.

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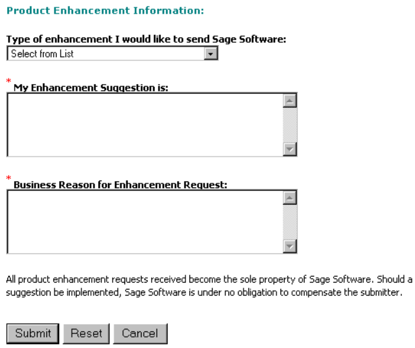
When you reach the bottom of the page, you see a Submit button.



5 Review your product enhancement request entries. You can remove all your typed entries, if desired, by clicking the Reset button.

6 Click Submit to send your product enhancement request to CS.

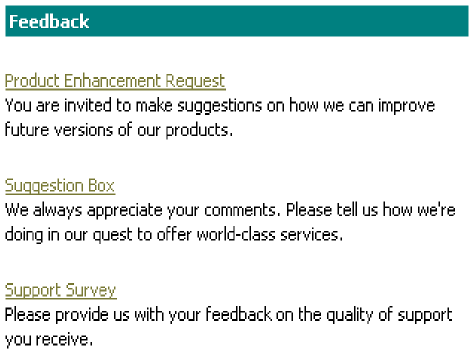
Although you probably will not receive any confirmation from Sage that your product enhancement request has been received, Sage will consider your request. Sage reserves the right to modify a future release of the Sage product according to your request, but Sage offers no compensation to users who suggest product enhancements.

Submitting Feedback to CS

To drop a comment in the CS suggestion box, follow these steps:

1 From a product-specific support page, scroll down until you can see the Feedback links on the right side of the page.

2 Click the link Suggestion Box.



3 The CS Suggestion Box form appears.

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4 Type information into the fields presented on the Customer Support Suggestion Box form. Some fields are required; the Customer Support Suggestion Box form cannot be processed without information in these fields. Required fields are marked by red field names.

5 Review your Suggestion Box entries. You can remove all your typed entries, if desired, by clicking the Reset button.

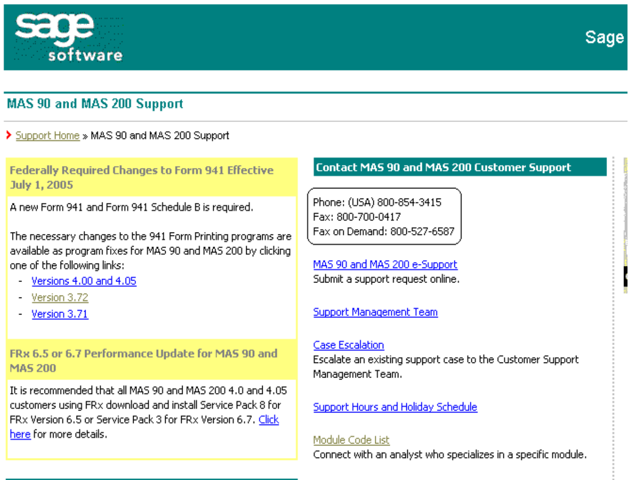
6 Click Submit to send your suggestion to CS.

Sage reserves the right to implement your suggestion without offering any compensation for the suggestion.

Viewing CS Phone Numbers

To view a list of telephone support numbers for Sage CS, follow these steps:

1. Login to Sage Software Online and choose a product-specific support page as described in *Logging Into Sage Software Online* in Chapter 2. For example, choose the MAS 90 and MAS 200 support link.
2. The Contact Information appears in the upper right side of the screen.



3. You can print this screen for future reference.
4. To return to the Sage Software Online Product Support screen, use the Back button or command of your browser. See the next chapter for information on viewing the status of your Sage customer support cases.

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Chapter 6

Viewing Support Cases and Changing Profiles

You can view the Support Cases that you have placed with the Sage Customer Support department. You can also send comments to Sage after you have reviewed a support case. Viewing support cases is discussed below on this page.

You can also change your personal profile information in Sage Software Online, as well as your company profile information, and manage your company's support contacts. These functions are discussed in "Changing Profiles" on page 65 and "Managing Your Company Contacts" on page 74.

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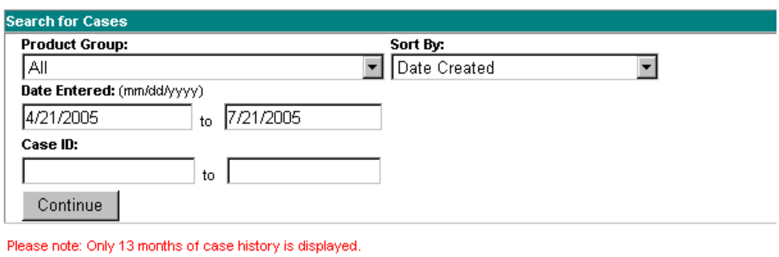
Viewing Your Support Cases

View your customer support cases as described in the following steps.

1 From the Support channel of Sage Software Online screen, select Case Inquiry.

The Case Inquiry Search screen appears.



2 The Case Inquiry feature allows you to search for cases logged by your company or, if you are a Sage Software Partner, your customers.

Once you have entered the desired criteria, click the Continue button to display all cases that match the criteria.

To display only one particular support case, type the desired support case number in the field titled Case ID. Then, click Continue.

The Case Information screen appears. Support cases for the last 13 months are displayed, sorted by date, with the most recent support cases at the top of the list.

Case Search Results

CaseID: 3373987.00000-2 calls **Reported By:** CSS InternalUser **Case Status:** Closed - Resolved
Product: MAS 500 Advanced -System_Manager -6.30 **Date Entered:** 7/20/2005 11:35:06 AM
Severity Level: Severity Level 3
Subject: this is another test
Link Name: Best Software, Inc. **Link Acct#:**9000012930

3 You can search again simply entering new search criteria at the top of the screen and clicking the Search Again button, or you can view more information about each support case by following the instructions below.

Case Information displayed on the screen above includes the following:

- **Case ID** – The ID number of your Sage support case.
- **Reported By** – The contact at your company who initiated the support case.
- **Case Status** – The current status of the support case. Case statuses include the following:
  -**Open** - Sage Customer Support (CS) is currently working on this case.
  -**Pending Customer Input** - CS is waiting for more information from the caller.
  -**Work in Progress** - A CS analyst is working on the case.
  -**PER Pending** - CS is notifying Sage Engineering that a fix is required for this support case issue.
  -**Callback** - CS has returned a call to your company and left a message because the contact was not available.
  -**Closed - Multiple Attempts** - CS has called twice on two separate days, and there is no response from the contact.
  -**Closed - Cancelled** - This issue in this support case was resolved by the contact, or the case should never have been opened.
  -**Fix Pending** - The issue in this support case is a known issue that will be resolved with an upcoming Engineering release of a fix to the software.
  -**Closed - Duplicate** - This case is closed because it is nearly identical to a similar support case opened by your company.

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-**Closed - No Response** - This case is closed because the contact at your company never returned phone calls or supplied the required information, after two attempts in two days to receive this information.
-**Closed - Resolved** - The issue is solved.
-**Closed - Pending** - Indicates that a resolution or workaround has been provided to the contact but the contact is unable to test or apply the resolution at the time of the call.
-**EDS** - The Developer Support Services (DSS) group is researching this support case.
-**Inter-Departmental** - This status is used when the case (or information on the case) has been transferred to another Sage department and CS is waiting for an answer from that other department.
-**KB Pending** - The issue on this case needs to be entered into the Sage knowledgebase of resolutions as a non-bug or frequently-asked-question (FAQ) type of issue.

- **Product** – The Sage product at issue in the support case.
- **Date Entered** – The date on which this support case was entered into Sage's call tracking system.
- **Subject** – A brief synopsis of the issue in the support case.

4 If you want to limit your view of cases to the cases for a particular Sage product line only, select a product group, such as MAS 90, from the Product Group pull-down menu. (The default selection is support cases for all Sage products.)

5 If you want to change the sorting order of the cases you are viewing, select a sort order, such as Date Created, from the Sort By pull-down menu. (The default selection is support cases sorted by Date Created.)

6 If you want to limit your view of cases to a particular date range, type the beginning date (for example, 10/01/2004) in the *Date Entered* field, then type the ending date (for example, 10/01/2005), in the *to* field, to the right of the Date Entered field. Then, click the Search Again button.

7 If you want to limit your view of cases to a particular Case ID number range, type the beginning Case ID (for example, 100000) in the *CaseID* field, then type the ending Case ID (for example, 200000), in the *to* field, to the right of the Case ID field. Then, click the Search Again button.

8 To view the call history details of a particular Support Case, including a brief transcript of the phone call conversation, click on the underlined case ID number. After you click on the Case ID number, the Call History screen for that particular support case appears. The Call History screen shows more information about a particular support case, as illustrated in the example below.

Calls reported in the past 13 months: 1 [Feedback to Sage Software]

Case ID: 3353311

Call Type: Inbound **Elapsed Time:** 1 min.
Date Entered: 6/20/2005 3:58:28 PM **Respond By:**
Entered By: blzucker
Resolution::
Discussed Note: q: trying to import batches into ar.invoice and when updating the sales journal get error 11 arwjab 1020
a: rename and manually reinitialize ar_01 and 02 r; ok

The **Call Type**, Inbound, designates that this Support Case was based on a phone call made to Sage Customer Support by a customer. Inbound is the most common Call Type. Other Call Types include the following:

- **Outbound** – Call made to a customer by a Sage Customer Support analyst.
- **Left Message** – Support analyst was not able to reach the contact; a live or voice mail message was left
- **Fax** – A fax was sent out to the customer
- **Internet** – Email was sent to, or received from, the contact
- **Internet Inbound** – Email sent to CS
- **Internet Outbound** – Email sent from CS
- **Analyst Notes** – Notes regarding testing of contact’s issue.
- **Call Center** – a system-generated call is created with this call type when a dispatch agent (not a support analyst) reopens a case.
- **Status call** – can be used to track a call that is made by an analyst to determine the status of the case.

In the Call History screen, **Elapsed Time** shows the length of the most recent phone call. **Date Entered** shows the date when the support analyst received or made the phone call and typed in the Call History. **Entered By** shows the name of the support analyst.

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Resolution shows the solution to the issue described in the Support Case. If there is a number listed under Resolution, you can use that number in the Sage Software Online Knowledgebase to find the complete details of the solution to the issue.

In the Call History screen, **Discussed Note** shows an abbreviated transcript of the discussion between the Sage support analyst and the contact at your company. Some abbreviations typically used by the support analysts when typing Discussed Notes include the following:

- **A:** – Answer from support analyst in response to the issue.
- **ACCT** – Account
- **ACCTG PER** – Accounting Period
- **ANS MACH** – Answering Machine
- **AP, AR, GL...** – Support analysts typically abbreviate the names of the accounting module involved. AP equals Accounts Payable, AR equals Accounts Receivable, GL equals General Ledger, and so on.
- **CB** – Call Back
- **CFG** – Configuration
- **DFDM** – Data File Display and Maintenance
- **ENGR** – Engineering
- **GFTD** – Gone for the day
- **MD** – Master Developer
- **Q:** – Question from caller, or a description of the issue.
- **QA** – Quality Assurance
- **R:** – Response to the answer provided by the support analyst.
- **RPT(S)** – Report(s)
- **TTU** – Tax Tables, Tax Table Updates
- **TRSG** – Technical Reference & Support Guide
- **WS** – Workstation

9 If you want to print out the case(s) you are viewing, click the Printable Version link at the upper right of the screen. This puts the case into a separate browser window from which you can use the Print command to print out a properly formatted page.

10 To send a comment to Customer Support regarding a particular support case that you are reviewing in the Call History screen, you can click the Feedback to Sage link at the upper right of the Call History screen.

The Feedback to Sage window appears.

11 Type your comment regarding this particular support case into the Comment field.

12 When you have finished typing your comment regarding the support case, click the Send Email button.

A message confirms that your comment has been sent to Sage CS.

13 When you are done reviewing the Call History for a Customer Support Case, click the Back button in the upper left corner of the screen to return to the Case Inquiry screen. Click the Back button again to return to the Sage Software Online Customer Support home page.

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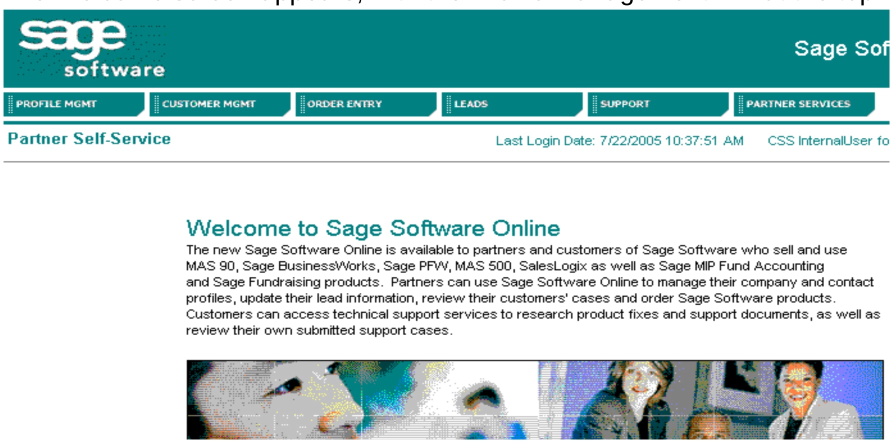
Changing Profiles

You can view profile information about authorized contacts, including username and password. If you are an Administrator, you can change some of this information.

You can also view or change company information such as company name, installed products, and shipping and billing addresses.

To change company and contact profile information, an Administrator can use the Profile Management screens. To begin changing profiles, use an Administrator username and password to log in to Sage Software Online.

The Welcome screen appears, with the Profile Management link at the top.



Using the Profile Management link, you can update your personal profile, update your company profile, update the list of your company's installed Sage products, view your agreement information, or perform a contact inquiry, as described in the following sections.

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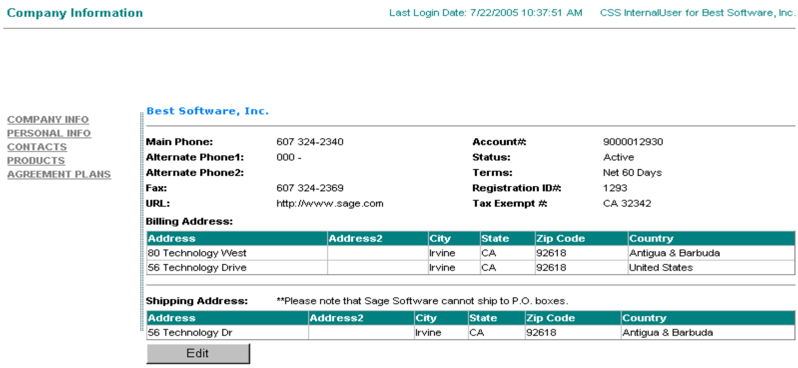
Updating Your Personal Information or Changing Your Username/Password

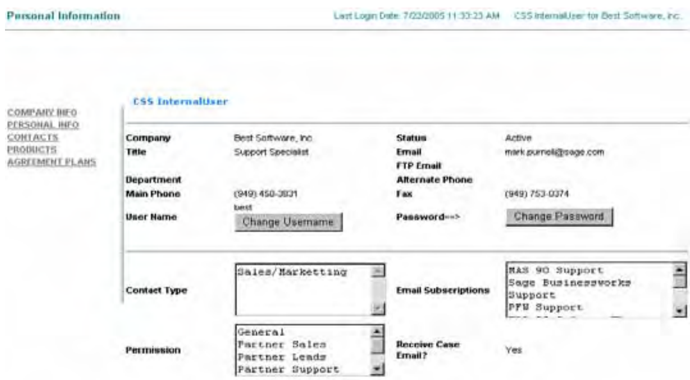
Update your profile or password as described in the following steps.

1 From the Welcome screen, select Profile Management.
The Profile Management screen appears.



2 Select Personal Info from the left hand menu.

The Personal Information screen appears.



3 View the information displayed for appropriate content.
If desired, you can change a username by clicking Change Username.

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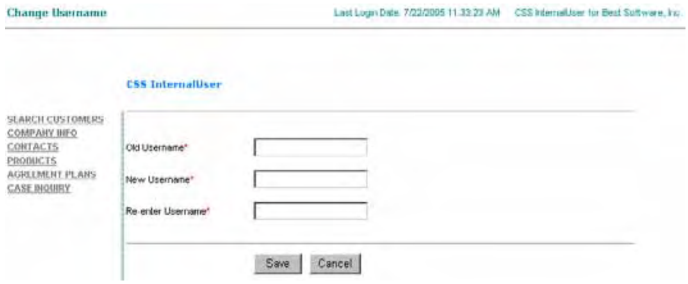
The Change Username screen appears.



4 In the Old Username field, type the current username.

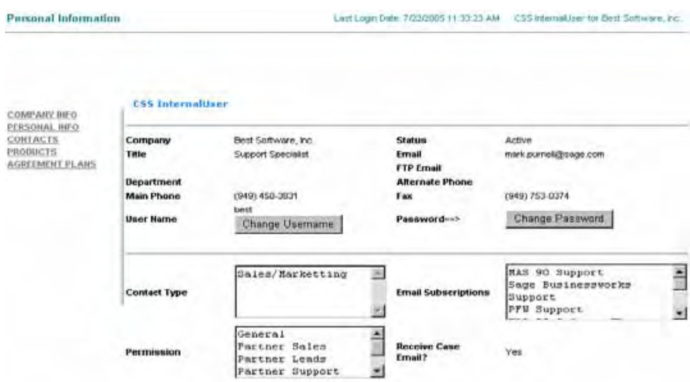
5 In the New Username field, type the desired new username.

6 In the Re-enter Username field, re-type the desired new username.

7 Click the Save button. You are returned to the Personal Profile screen.

8 Also, If desired, you can change passwords. From the Personal Profile screen, select Personal Info from the left hand menu.

The Personal Information screen appears.



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9 Click Change Password.

The Change Password screen appears.

10 In the Old password field, type your current password.

11 In the New password field, type your desired new password.

12 In the Re-enter password field, re-type your desired new password.

13 Click the Save button.

You are returned to the Personal Profile screen and an e-mail is sent to you to confirm your changed password.

14 To change your other personal information from the Personal Profile screen, scroll down to the Modify button. Click the Modify button.

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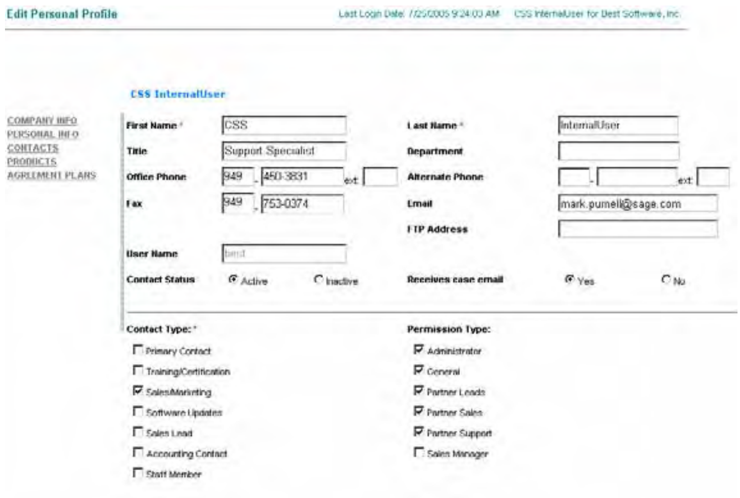
The Edit Personal Profile screen appears. Fields which require an entry are marked with red asterisks.



15 In the First Name and Last Name fields, verify or change the names.

16 If desired, type business title and department information into the Title and Department fields.

17 In the Office Phone fields, verify or change the telephone information.

18 If desired, type your business telephone numbers into the Alternate Phone and Fax fields.

TIP Enter an e-mail address if you plan to receive e-mail notices from Sage.

19 In the Email Address field, verify or change your Internet e-mail address information. (Email Address is required if you want to make use of the Receives Case Email checkbox.)

20 In the Contact Status area, click the Active button to change an Inactive contact to an active one, or click the Inactive button to change an active contact to an inactive one.

21 Choose one of the following Contact Types:

Primary -- Each company has only one Primary contact. This contact will receive all Sage information, including promotional rankings, tier information, special incentives, renewal notices for support agreements, communications for key contacts, sales and marketing communications, and mailers.

Training/Certification -- Each company has only one Training & Certification contact. This contact is responsible for reviewing and disseminating information related to Sage Product Training, certification, and assessments. The contact will receive training catalogs, certification program guidelines, and information about computer-based and Web-based training offerings.

Sales/Marketing -- Each company can have multiple Sales/Marketing contacts. This contact will receive weekly e-mails, sales and marketing communications, promotions, pricing, new product announcements, and ClientCare and support information.

Software Updates -- Each company has only one Software Updates contact who maintains the company's Sage software products. This contact will receive software updates and communications.

Sales Lead -- Each company has only one Sales Lead contact who is responsible for leads and prospect information. This contact will receive e-mail notifications of leads by product line, and Sage Accountant Alliance leads.

Accounting Contact -- Each company has only one Accounting contact who has access to accounts, purchase orders, billing, invoices, and payables, such as an Accounting Manager, CFO, Controller, or Company President.

Staff Member -- Use the Staff Member contact type if no other contact type applies.

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22 Choose one or more than one of the following Permission Types:

TIP The Administrator should also have the General, Support, and Partner Sales permissions.

Administrator -- An Administrator contact may access Profile Management, Contact Management, and Support. Administrators can modify their own personal profile, modify the personal profiles of other contacts, add contacts, and modify most fields in the company profile.

General -- The authorized contact may view his or her personal contact information, as well as viewing other contacts and company information. This is one of the default settings for an active contact with an active support plan.

Partner Leads (Sage Software Partners only) -- The authorized contact may view, edit, and register sales leads.

Partner Sales (Sage Software Partners only) -- The authorized contact may access Profile Management and Contact Management. The contact can view order tracking, manage quotes, renew company agreements, and place orders for any product line that the company has entitlements for.

Partner Support (Sage Software Partners only) -- The authorized contact may access product-line specific support pages and case information. This is the other default setting for an active contact with an active support plan.

Sales Manager --

23 From the Email Subscription Lists checkboxes, view or change your subscriptions to Sage Software e-mail lists. Select from the left-hand column of checkboxes the products for which you would like to receive regular e-mail distributions of support documents or marketing, sales, and strategic documents. Clear the checkboxes for which you no longer wish to receive e-mail distributions.

24 In the Assigned Agreements area, you can see the valid ClientCareCare agreements for your company. To assign an authorized contact to one of these agreements, click an Assigned Agreement checkbox (or remove the checkmark from a checkbox to take this contact of off an agreement).

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25 To save the changes to your personal information, click the Save Profile button at the bottom of the screen. To clear the changes you have made, click the Cancel button.

The Personal Profile screen appears. Use the Back button to return to a previous screen, if desired, or click one of the channels in the Contents column on the left of the screen.

Updating Your Company Information

Update the profile information for your company as described in the following steps.

1 From the Welcome screen, select Company Info.

The Company Information screen appears.

2 View the information displayed for appropriate content.

3 To modify your company information, click the Edit button. This button is at the bottom of the screen.

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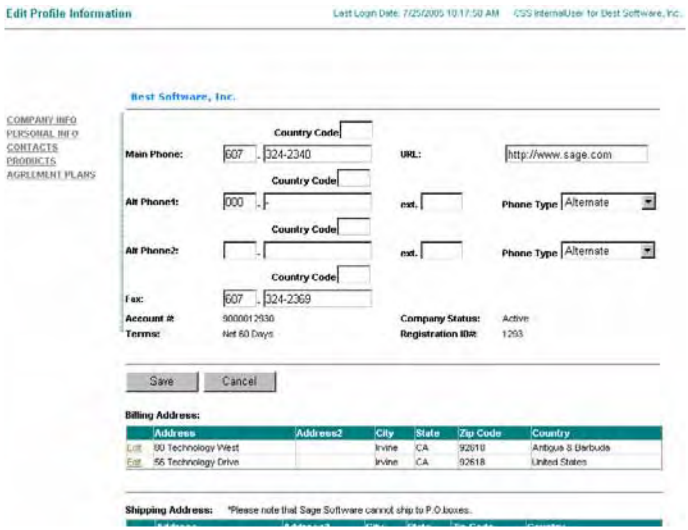
The Company Information modification screen appears.



4 In the Office Phone field, verify or change the telephone information.

5 If desired, type your alternate business telephone numbers into the Alternate Phone fields. You can use the pull-down menu to the right of each Alternate Phone field to designate the field as a Alternate Fax number or an Alternate Telephone number.

6 In the URL field, verify or change your company's website URL.

7 In the Fax field, verify or change your main fax number information.

8 Verify your billing and shipping addresses in the Billing and Shipping Address fields. You can modify the Billing or Shipping Address by clicking the word Edit just to the left of the address. If you modify the Billing or Shipping Addresses, you need to click the Save button to save the changed address, or click the Cancel button to cancel the changes.

9 To save the changes to your company information, click the Save button at the bottom of the screen. To clear the changes you have made, click the Cancel button.

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The Company Information screen appears. Use the Back button to return to a previous screen, if desired, or click one of the channels in the Contents column on the left of the screen.

Managing Your Company Contacts

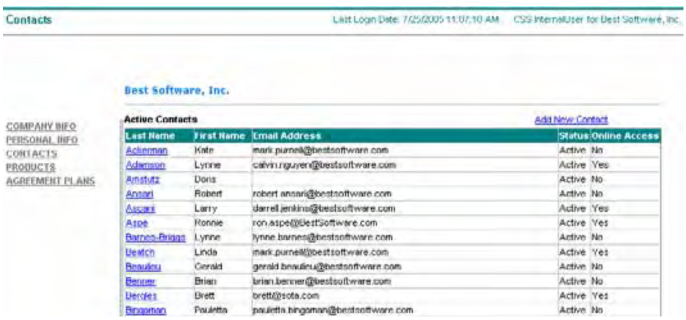
If you are an Administrator, you can modify the list of people at your company known to Sage as authorized contacts as described in the following steps.

1 From the Welcome screen, select Profile Management.

The Profile Management screen appears.

2 Select Contacts.

The Contact Management screen appears.



3 To modify a contact, click on the contact's last name.

The Personal Information screen appears. Scroll down and click the 'Modify' button.

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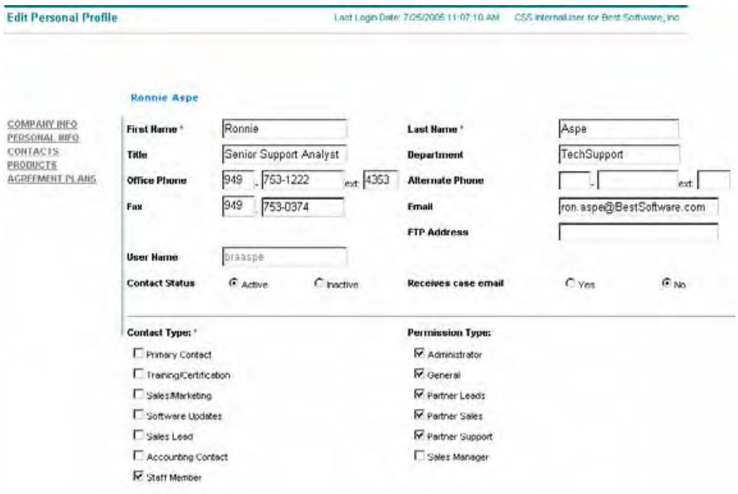
The Edit Personal Profile screen appears. Fields which require an entry are marked with red asterisks.



4 In the First Name and Last Name fields, verify or change the names.

5 If desired, type business title and department information into the Title and Department fields.

6 In the Office Phone fields, verify or change the telephone information.

7 If desired, type business telephone numbers into the Alternate Phone and Fax fields.

TIP Enter an e-mail address if you plan to receive e-mail notices from Sage.

8 In the Email Address field, verify or change the Internet e-mail address information. (Email Address is required if you want to make use of the Receives Case Email checkbox.)

9 In the Contact Status area, click the Active button to change an Inactive contact to an active one, or click the Inactive button to change an active contact to an inactive one.

10 Choose one of the following Contact Types:

Primary -- Each company has only one Primary contact. This contact will receive all Sage information, including promotional rankings, tier information, special incentives, renewal notices for support agreements, communications for key contacts, sales and marketing communications, and mailers.

Training/Certification -- Each company has only one Training & Certification contact. This contact is responsible for reviewing and disseminating information related to Sage Product Training, certification, and assessments. The contact will receive training catalogs, certification program guidelines, and information about computer-based and Web-based training offerings.

Sales/Marketing -- Each company can have multiple Sales/Marketing contacts. This contact will receive weekly e-mails, sales and marketing communications, promotions, pricing, new product announcements, and ClientCare and support information.

Software Updates -- Each company has only one Software Updates contact who maintains the company's Sage software products. This contact will receive software updates and communications.

Sales Lead -- Each company has only one Sales Lead contact who is responsible for leads and prospect information. This contact will receive e-mail notifications of leads by product line, and Sage Accountant Alliance leads.

Accounting Contact -- Each company has only one Accounting contact who has access to accounts, purchase orders, billing, invoices, and payables, such as an Accounting Manager, CFO, Controller, or Company President.

Staff Member -- Use the Staff Member contact type if no other contact type applies.

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11 Choose one or more than one of the following Permission Types:

TIP The Administrator should also have the General, Support, and Partner Sales permissions.

Administrator -- An Administrator contact may access Profile Management, Contact Management, and Support. Administrators can modify their own personal profile, modify the personal profiles of other contacts, add contacts, and modify most fields in the company profile.

General -- The authorized contact may view his or her personal contact information, as well as viewing other contacts and company information. This is one of the default settings for an active contact with an active support plan.

Partner Leads (Sage Software Partners only) -- The authorized contact may view, edit, and register sales leads.

Partner Sales (Sage Software Partners only) -- The authorized contact may access Profile Management and Contact Management. The contact can view order tracking, manage quotes, renew company agreements, and place orders for any product line that the company has entitlements for.

Partner Support (Sage Software Partners only) -- The authorized contact may access product-line specific support pages and case information. This is the other default setting for an active contact with an active support plan.

Sales Manager --

12 From the Email Subscription Lists checkboxes, view or change the subscriptions to Sage Software e-mail lists. Select from the left-hand column of checkboxes the products for which the contact would like to receive regular e-mail distributions of support documents or marketing, sales, and strategic documents. Clear the checkboxes for which the contact no longer wishes to receive e-mail distributions.

13 In the Assigned Agreements area, you can see the valid ClientCareCare agreements for your company. To assign an authorized contact to one of these agreements, click an Assigned Agreement checkbox (or remove the checkmark from a checkbox to take this contact of off an agreement).

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14 To save the changes to the contact personal information, click the Save Profile button at the bottom of the screen. To clear the changes you have made, click the Cancel button.

15 To view any inactive contacts, click the Inactive Contacts button at the bottom of the screen. To inactivate a contact, see the next step; or skip to the last step.

16 As an optional step, you can remove an Active Contact, if desired. To inactivate a particular contact, click on the Last Name of that contact, then click on the Inactive button and save your changes.

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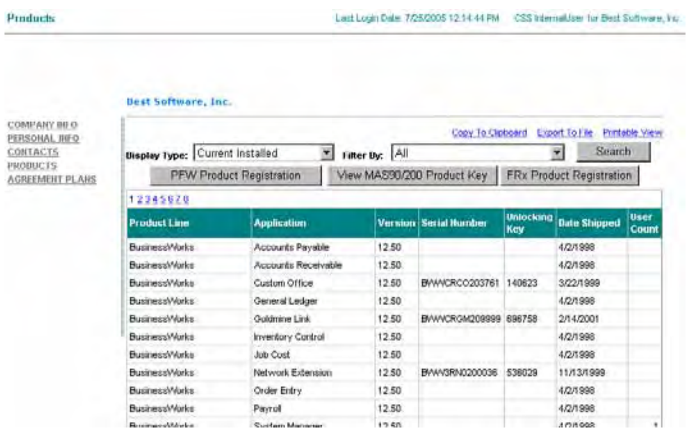
Viewing Your Current Installed Products

View the list of the Sage products that you have currently installed at your company as described in the following steps.

1 From the Profile Management menu, select Products.

The Products screen appears. All of your currently installed products are displayed, along with the corresponding Version and Serial Numbers, Unlocking Keys, and Dates Purchased.



2 To narrow the range of installed products displayed, you can select a particular Sage product line, such as MAS 90, from the Filter By pull-down menu. Then click the Search button.

If you do so, only the installed products from that product line will be displayed.

3 For a list of all the Sage products your company has ever owned, including products that are no longer supported or are outdated, you can select History Installed from the Display Type pull-down menu. Then click the Search button.

4 To return to the Profile Management menu, you can click the Profile Management Menu link near the top of the screen.

Chapter 7

Subscribing to an E-Mail List

A Sage e-mail list is a list of names and e-mail addresses of Sage customers who have indicated that they are interested in news about a particular product line. At regular intervals, Sage will distribute e-mail information to the members of each list.

By subscribing to a Sage e-mail list, Sage Software Online users with an e-mail address can automatically receive new tips, messages, and notices for a particular product.

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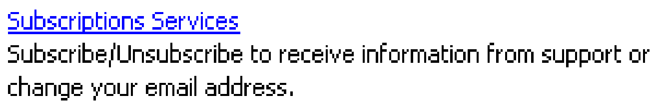
Joining or Quitting an E-Mail List

You may have chosen to subscribe to an e-mail list when you first registered for Sage Software Online, as described in Chapter 2. If not, you can subscribe to an e-mail list now. Or, you can cancel or change your current subscription.

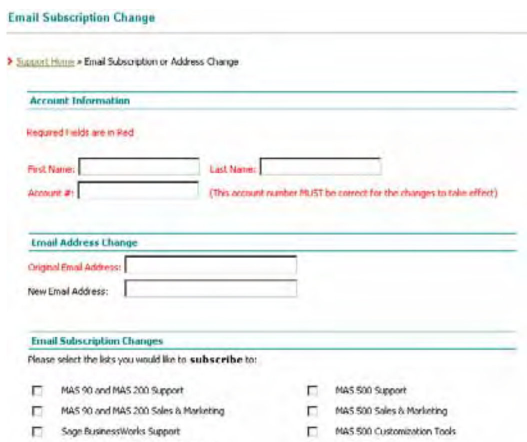
To subscribe to an e-mail list, or to cancel or change your current subscription, follow these steps:

1 Login to Sage Software Online and choose a product-specific support page as described in *Logging Into Sage Software Online* in Chapter 2. For example, choose the MAS 90 and MAS 200 support link.

2 Locate the Subscription Services link at the right bottom of the Support page, under the Additional Resources section.



3 Click the Subscription Services link. The Email Subscription Change page appears.



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4 Type entries in the fields on the top third of the Email Subscription Change page. Some entries are required; your request to be added or dropped from an e-mail list cannot be processed unless all required entries are made. Required entries have red field names.

5 Select the Subscribe checkboxes on the middle third of the Email Subscription Change page to receive e-mail about those topics. By selecting, or placing a checkmark in, a subscription checkbox, you indicate that you wish to receive e-mail about the selected item.

6 Select the Unsubscribe checkboxes on the bottom third of the Email Subscription Change page to no longer receive e-mail about those topics. By selecting an unsubscription checkbox, you indicate that you no longer wish to receive e-mail about the selected item.

7 Review the checked items on the page to make sure you have subscribed to, or unsubscribed from, the desired e-mail lists. You can clear all your selections and all your typed entries from this screen by clicking the Clear button.

8 To send your e-mail request to Sage, click the Submit button.

The Confirmation screen appears, telling you that your submission has been received.

9 To return to the previous page, close the Email Subscription Change page window, by clicking the ’X’ in the upper right of the page. Alternatively, click the Support Home link in the upper left of the page to return to the Support Home page.

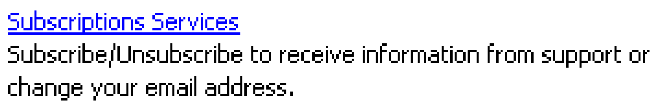
Changing Your E-Mail Address

If your e-mail address changes, you must supply Sage with your current e-mail address if you wish to continue as a subscriber to the e-mail lists.

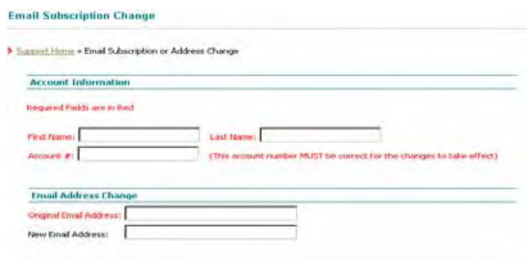
To change your e-mail address, follow these steps:

1 Login to Sage Software Online and choose a product-specific support page as described in *Logging Into Sage Software Online* in Chapter 2. For example, choose the MAS 90 and MAS 200 support link.

2 Locate the Subscription Services link at the right bottom of the Support page, under the Additional Resources section.



3 Click the Subscription Service link. The Email Subscription Change page appears.



4 Type entries in the First Name, Last Name, Account No., Original Email Address and New Email Address fields. Your old e-mail address should be typed in the Original Email Address field and your new e-mail address should be typed in the New Email Address field.

5 To send your new information to Sage, click the Submit button.

The Confirmation screen appears, telling you that your submission has been received.

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6 Your e-mail address is updated. To return to the previous page, close the Email Subscription Change page window, by clicking the 'X' in the upper right of the page. Alternatively, click the Support Home link in the upper left of the page to return to the Support Home page.

Chapter 8

Using Discussion and Chat Forums

This section describes the use of the SageTalk discussion and chat forums. SageTalk is available to the general public and free of charge.

Sage employees, such as Sage Customer Support analysts, occasionally respond to messages posted in SageTalk discussion forums. However, Sage does not offer any formal support through the SageTalk discussion forums. Instead, Sage sponsors SageTalk as a meeting place for the global community of Sage customers and Sage partners.

You can begin using SageTalk immediately. The only restriction is that each SageTalk user who posts messages must have a unique e-mail address. Multiple SageTalk users cannot register using the same e-mail address. (No e-mail address is required if you want to only view the SageTalk messages.)

If you plan to post messages in SageTalk, please exercise good judgement in expressing your personal opinions, and strive to be courteous. Rules of conduct are listed on page 87.

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SageTalk Functions

While you are using SageTalk, you have the following abilities:

Register -- Choose a nickname, decide whether or not to make your e-mail address and profile are visible to other users, and select an author icon from a large set of illustrated characters and symbols.

Read existing discussion forums -- More than 30 forums are available with subjects such as Installation, Payroll, Manufacturing, and Jobs Available. You can read, and respond to, the topic entries in these forums -- topics within a forum are user-defined and are typically things like Need Help Upgrading, or Questions About Reports.

Start new discussions -- You can start a new topic within a forum by clicking the New Topic button. Other SageTalk users can then respond to your questions and concerns.

Chat with current users -- You can chat with other users by clicking the Chat button. Any user that is currently online with you can immediately respond in an interactive, conversational format.

Customize your settings and profile -- You can define the colors displayed on your screen, the order in which messages are displayed, the number of messages displayed, and other options.

Search -- You can search discussion forums by keyword, or by user name.

Get help -- You can view online instructions by clicking the Help button.

SageTalk is intended for Sage partners and customers who use, sell, or develop Sage applications. However, SageTalk is not restricted, so any computer user with Internet access can participate.

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Rules of Conduct

As with any public forum, there is an expectation of adherence to certain rules of courtesy to prevent an inconsiderate few from dominating the discussion.

Rule 1: Keep the topic of messages relevant to the subject of the forum. It's normal for some message topics to drift from the stated subject. However, to ensure maximum impact and benefit for all involved, please keep your messages close to the forum's subject.

Rule 2: Respond to a message with another message, rather than a private e-mail. This allows all interested parties to see the resolution of a discussion in progress. If a Sage CS analyst voluntarily posts a response to a message, and an end user e-mails this analyst with a specific support question, the CS analyst may elect to open a support case for that customer, which would require a current account number and support contract.

Rule 3: Avoid posting a message to several forums instead of just one. Multiple forums are created so that people who are not interested in a given subject will not have to read information on that subject. Please post messages only in the one forum that best fits your needs. If you are not sure which forum to post in, post messages in the most general forum available, as these messages will be seen by the widest range of participants, including CS analysts.

Rule 4: Use appropriate language. Avoid profanity and personal attacks in your postings.

Rule 5: Feel free to identify yourself and your company, but not your Sage account number.

Rule 6: Do not use SageTalk to advertise your product.

Rule 7: Piracy and trading of software is not allowed.

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Using SageTalk

To view SageTalk, follow the steps below:

1 Login to Sage Software Online and choose a product-specific support page as described in *Logging Into Sage Software Online* in Chapter 2. For example, choose the MAS 90 and MAS 200 support link.

2 Click the SageTalk Online Forums link at the right bottom of the Support page, under the Additional Resources section. The Home page appears.

From here, you can join as a SageTalk user and get a username and password (see page 89), log in with your username and password (see page 92), view messages (see page 94), and post your own messages (see page 97).

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Joining

Joining SageTalk involves filling out a brief form with some personal information such as name and e-mail address. You need to join once, and then log in on subsequent visits to SageTalk, if you plan to participate in discussions and post messages.

If you have already joined, proceed to *Logging In* on page 92. To read messages without joining, proceed to *Viewing Discussions* on page 94.

Join SageTalk as described in the following steps.

1 From the SageTalk Home page, select the Join tab.

The Join page appears.

From here you can read the Registration Agreement for SageTalk.

2 Read the Registration Agreement, then click the "I Agree" button at the bottom.

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Note
You must enter text in any field marked by an asterisk.

3 In the fields on the Join page, type the following information:

- **First Name** -- Type your first name. You are limited to 35 characters.
- **Last Name** -- Type your last name. You are limited to 35 characters.
- **UserName** -- Type your username. Your are limited to 35 characters.

- **City** -- Type your city of residence or business.
- **State/Province** -- If you live in a U.S. state or territory, or Canada, you can select your state or province from the pull-down list.
- **Country** -- From the pull-down list, select your country. (For U.S. residents, you can click the list and press U six times to scroll to the United States entry, rather than scrolling to the bottom of the list.)
- **Time Zone** -- From the pull-down list, select your Greenwich Mean Time (GMT) time zone.
- **Website** -- If you or your company has a website URL, you can enter that URL here. The URL must start with http:// (in other words, enter a fully-qualified URL).
- **ICQ #** -- Type your ICQ number, if you have one. ICQ is a program (available free from www.icq.com) that notifies you when friends and associates are online and enables you to contact them. The ICQ number is assigned to you when you install ICQ.
- **AIM #** -- Type your AIM (AOL Instant Messenger) number, if you have one.
- **Email Address** -- Type your e-mail address. Each new SageTalk registration requires a unique e-mail address.
- **Profile Visibility** -- Select this checkbox if you want other users to be able to click the View profile icon next to any of your forum messages. Other users are then able to see certain details about your SageTalk profile, such as nickname, city, country, website, date you joined SageTalk, and ICQ #.
- **E-mail Visibility** -- Select this checkbox if you want other users to able to see your e-mail address by clicking the View Profile button next to any of your forum messages.
- **Signature** -- If you would like signature text, such as your name and company name, to appear at the bottom of each message you post, type your signature text in the Signature field.
- **Select the author icon you wish to use** -- Select the icon you would like to appear next to the messages that you post in SageTalk. Click on one of the many character faces shown to select your icon.

Note Your e-mail address must be unique within BestTalk. Another user cannot share your e-mail address.

4 Click the 'Join SageTalk Forums' button.

If not all of the required information was entered on the Join form, or the e-mail address was not valid or unique, a screen appears, requesting that you attempt registration again.

If you see the above message, use your Browser's Back button to return to the Join screen. Make sure all required fields have valid entries and press the Submit button again.

If all the required information was entered on the Join form, and the e-mail address was valid and unique, a screen appears, confirming your successful registration.

Within a minute, Sage will send an e-mail to the e-mail address you specified on the Join page. The e-mail will contain your username and a system-generated password. You cannot change your password, but you can select a *Remember my username* checkbox when you log in, so that you do not need to re-enter your password every time.

5 Once you have received the e-mail from Sage with your username and password, you can login to SageTalk as described in *Logging In* on page 92.

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Logging In

To post messages, you must log in first. To only view messages, you do not need to log in.

Once you have joined SageTalk, you can log in. Log in using the username and password sent to you through e-mail during the registration process (described on page 89).

Log in to SageTalk as described in the following steps.

1 From the SageTalk Home page, select the Login tab.

The Login page appears.

2 In the Username and Password fields of the Login page, type your SageTalk username and password.

(If you have forgotten your username or password, you can refer to the e-mail you received from Sage, or you can click the words *Forget your login information?*. You'll be prompted for your e-mail address -- type your e-mail address and click the Submit button. Your username and password will arrive via e-mail.)

If you want SageTalk to remember your Username and Password, place a checkmark in the *Remember my login* checkbox. (Next time you log in to SageTalk, your Username will be displayed after you type the first letter. Then, press Down Arrow and Enter to automatically fill in the Username field. The Password is also filled in.)

3 Click the Login button.

A message displays telling you that your login was successful and then the SageTalk Home page appears.

You are now logged in to SageTalk.

You remain "logged in" to SageTalk until you log out. Even if you exit your Web browser, or take your Web browser to a different website, you are still logged in. However, your username will not be displayed to other SageTalk users as a "currently logged in" user unless you have the SageTalk website up on your Web browser screen.

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You will not have to re-enter your username and password until you click the SageTalk logout tab, and log out completely.

While logged in, you can post and view messages, and customize your SageTalk display or message viewing order, as described in the following pages. Or you can log out of SageTalk (see page 118).

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Viewing Messages

Once you have directed your browser to the SageTalk URL, or logged in as described on page 92, you can view the messages in the SageTalk discussion forums.

View messages as described in the following steps.

1 From the SageTalk Home page, press the Page Down or Down Arrow key to view all the available discussion forums.

The date and time following the words Last Post indicates when the latest message was added to this forum. The number of topics within this discussion forum is shown next to the word Topics.

The picture of the yellow notepad with the pencil, to the left of the discussion forum name, indicates that a new topic has been added here. A yellow notepad with no pencil indicates no new topics.

2 When you see a forum of interest, click on the forum link. For example, click the BusinessWorks - Installation link. All the topics in the forum are displayed.

To the left of the topics is a picture of a notepad. If the notepad includes a pencil, then the topic has had recent activity, such as new messages. If the notepad picture includes no pencil, then no new activity has occurred here recently. If the notepad picture includes a padlock, then the topic has been locked, and no new messages are allowed.

3 Click on the topic link to view all the messages under that topic. For example, click Custom Worksheets.

The message is displayed.

4 Press Page Down or Down Arrow to view the entire message and all the responses to the message. The responses to the message appear beneath the original message. The icons at the upper right of the message are explained in the section *Message Icons* on page 96.

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5 When done reading the message and the responses, you can use the Back button to return to the view of the discussion forums. Or, if you have logged in to SageTalk, you can respond to the message or start a new message topic as described in the section *Posting Messages* on page 97.

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Message Icons

Private messages: If you have been sent a private message, you'll see a Private Message notification.

You can click on the private message icon to view the private message, and then you can delete or reply to the private message.

Forum messages: Each discussion forum message has a set of icons in the upper right corner. These icons allow you to view the profile of the message writer, subscribe to the topic, and send e-mail to the author of the message, as described below. If you have not logged in and you are only viewing (not posting) messages, you will see fewer of these icons. This is because you do not have the privilege of responding to a message until you log in.

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Subscribe to Thread -- To automatically receive an e-mail each time a new message is added to this topic, click the Subscribe to Thread icon. You will be prompted to confirm that you wish to subscribe by clicking a Subscribe button. (The terms *thread* and *topic* are used interchangeably.)

Email Thread -- To send the content of the messages within the current topic to an e-mail address, click the Email Thread icon. You will be prompted to enter the recipient's e-mail address and name. Then click the E-Mail Thread button to send all the messages in this topic to the recipient.

View Profile -- To see information about the author of the current message, click the View Profile icon.

Send an ICQ Message -- ICQ is a program from www.icq.com that notifies you when associates are online and enables you to contact them. If you and the author of the current message entered an ICQ number when joining SageTalk, you can click the icon to establish ICQ communications.

Send Private Message -- To send an e-mail to the author of the current message, click the Send Private Message icon. You will be prompted to enter the text of your private message and then click a Done button.

Print Thread -- To view a text version of the thread and print it, click the Print Thread icon.

Text Format -- To display a text version of the thread's contents, click the Text Format icon.

Attached File -- If the current message has an attached file, you can download that file by clicking this icon. This icon usually appears at the bottom, rather than the top right, of a message with an attached file.

Posting Messages

Once you have logged in as described on page 92, you can post a reply to an existing message, or post your own new message, in the SageTalk discussion forums.

Post replies and messages as described in the following steps.

1 From the SageTalk Home page, press the Page Down or Down Arrow key to view all the available discussion forums. The date and time following the words Last Post indicates when the latest message was added to a forum.

2 When you see a forum of interest, click on the forum link. For example, click the <u>BusinessWorks - Installation</u> link.

All the topics in the forum are displayed.

Responding to existing messages

Click on the topic link to view all the messages under that topic. For example, click <u>Custom Worksheets</u>.

The message is displayed.

3 Press Page Down or Down Arrow to view the entire message and all the responses to the message. The responses to the message appear beneath the original message.

4 Click on the Reply button.

The Reply page is displayed. (For reference, the message to which you are replying is displayed at the bottom of the Reply page. You can scroll down to re-read the original message.)

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5 Type your reply in the "Message Text" field. The options for special formatting of the text of your reply are shown below. You insert the special formatting characters using the formatting buttons. When others see your posted message, the desired formatting will have been applied to your message text.

- **Bold** -- Click the bold button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want to bold will appear in the body of your message between [B] [/B].
- **Italics** -- Click the italics button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want italicized will appear in the message body between [I] [/I].
- **Underline** -- Click the underline button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want underlined appears between [U] [/U].
- **URL** -- Click the http button. Type the URL in the Explorer User Prompt window that appears, and click OK. A second Explorer User Prompt window appears -- type your label for the URL, and click OK. The active (clickable) URL or link to a website appears between [L=] [/L], and the words immediately following L= are the label of your URL link. For example, use the following syntax: [L=My Website]http://www.me.com[/L].
- **Secure URL** -- Click the https button. Type the secure URL in the Explorer User Prompt window that appears, and click OK. A second Explorer User Prompt window appears -- type your label for the Secure URL, and click OK. The active (clickable) URL or link to a website appears between [S=] [/S], and the words immediately following S= are the label of your URL link. For example, use the following syntax: [S=My Secure Website]https://www.secureme.com[/S].
- **FTP URL** -- Click the ftp button. Type the ftp URL in the Explorer User Prompt window that appears, and click OK. A second Explorer User Prompt window appears -- type your label for the ftp URL, and click OK. The active (clickable) URL or link to an ftp site appears between [F=] [/F], and the words immediately following F= are the label of your ftp URL link. For example, use the following syntax: [F=My FTP Site]ftp://www.ftp.com[/F].
- **E-Mail Address** -- Click the mail button. Type the e-mail address in the Explorer User Prompt window that appears, and click OK. A second Explorer User Prompt window appears -- type your label for the e-mail address, and click OK. The active (clickable) link to an e-mail address

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appears between [E=] [/E], and the words immediately following E= are the label of your e-mail address link. For example, use the following syntax: [E=My E-Mail Address]john.doe@yourcompany.com[/E].

- **Quote** -- Click the quote button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want in quotes will appear in the body of your message between [Q] [/Q].
- **Horizontal Rule** -- Click the hr button. An [hr] will appear in the body of your message, which produces a horizontal line across the width of the page.
- **Highlight** -- Click the highlight button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want in quotes will appear in the body of your message between [h] [/h].
- **Bulleted List** -- Click the LI button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want to display as a bulleted item will appear in the body of your message following [LI].
- **Indented Bulleted List** -- Click the unordered list button. The formatting codes [bullet][/bullet] will appear. Then, click the LI button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want to display as a bulleted item will appear in the body of your message following [LI]. To get indented bullets, cut the text following the [LI] codes, and paste this text in between the [bullet][/bullet] codes.
- **Numbered List** -- Click the numbered list button. The formatting codes [num][/num] will appear. Then, click the LI button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want to display as a numbered list will appear in the body of your message following [LI]. To get the numbered list, cut the text following the [LI] codes, and paste this text in between the [num][/num] codes.
- **Smiley and Frowny Faces** -- If you want to display a colorful version of the well-known smiley or frowny e-mail emoticons, you can type :) or :(in the body of your message, and that string of text is automatically converted to an icon. Use the following syntax (enter only the first two characters in your message), or select your emoticon from the pull-down list next to the Emotion button:

  :((Frown)
  :) (Smile)
  :o (Embarrassment)
  :D (Big Grin)
  :| (Mad)
  :Q (Shocked)
  ;) (Wink)

:P (Tongue)

6 If you click the ’Subscribe to this topic’ checkbox, you will receive an e-mail each time a new message is added to the current topic. (The terms *thread* and *topic* are used interchangeably.) This way you can quickly find out about new messages without having to be logged in and checking the topic constantly. (If you find that you are getting too many e-mail notifications about new messages, or you are no longer interested in this topic, return to this topic and take off the checkmark in this checkbox.)

7 When done typing your reply, click the Reply button.

Your reply will now appear under the previous postings in the topic area.

Note If you are replying to an existing post, try using the message icons on page 96.

You can also use the message icons to respond to messages and subscribe to threads. See *Message Icons* on page 96 for information on using the message icons.

When finished writing a message, you can use the Back button to return to the view of the discussion forums. You can edit your reply, or post a new message, as described below.

Editing your reply

1 If you want to amend or edit your reply, you can click on the Edit button, which appears under the messages that you have posted only. If you click the Edit button, you are returned to the Reply page shown in step 4 above, with the text of your message already loaded.

2 Once you are finished editing your reply, click the Update button.

Posting a new message

1 From the SageTalk Home page, press the Page Down or Down Arrow key to view all the available discussion forums. The date and time following the words Last Post indicates when the latest message was added to this forum.

2 When you see a forum of interest, click on the forum link. For example, click the BusinessWorks - Installation link.

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All the topics in the forum are displayed.

3 Click on the new topic tab.

The New Post page is displayed.

4 Type the title of the new topic in the Message Title field.

5 Type your new message in the field named "Message Text" here. The options for special formatting of the text of your message are shown below. You insert the special formatting characters using the formatting buttons. When others see your posted message, the desired formatting will have been applied to your message text.

- **Bold** -- Click the bold button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want to bold will appear in the body of your message between [B] [/B].
- **Italics** -- Click the italics button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want italicized will appear in the message body between [I] [/I].
- **Underline** -- Click the underline button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want underlined appears between [U] [/U].
- **URL** -- Click the http button. Type the URL in the Explorer User Prompt window that appears, and click OK. A second Explorer User Prompt window appears -- type your label for the URL, and click OK. The active (clickable) URL or link to a website appears between [L=] [/L], and the words immediately following L= are the label of your URL link. For example, use the following syntax: [L=My Website]http://www.me.com[/L].
- **Secure URL** -- Click the https button. Type the secure URL in the Explorer User Prompt window that appears, and click OK. A second Explorer User Prompt window appears -- type your label for the Secure URL, and click OK. The active (clickable) URL or link to a website appears between [S=] [/S], and the words immediately following S= are the label of your URL link. For example, use the following syntax: [S=My Secure Website]https://www.secureme.com[/S].

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- **FTP URL** -- Click the ftp button. Type the ftp URL in the Explorer User Prompt window that appears, and click OK. A second Explorer User Prompt window appears -- type your label for the ftp URL, and click OK. The active (clickable) URL or link to an ftp site appears between [F=][/F], and the words immediately following F= are the label of your ftp URL link. For example, use the following syntax: [F=My FTP Site]ftp://www.ftp.com[/F].

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- **E-Mail Address** -- Click the mail button. Type the e-mail address in the Explorer User Prompt window that appears, and click OK. A second Explorer User Prompt window appears -- type your label for the e-mail address, and click OK. The active (clickable) link to an e-mail address appears between [E=] [/E], and the words immediately following E= are the label of your e-mail address link. For example, use the following syntax: [E=My E-Mail Address]john.doe@yourcompany.com[/E].
- **Horizontal Rule** -- Click the hr button. An [hr] will appear in the body of your message, which produces a horizontal line across the width of the page.
- **Highlight** -- Click the highlight button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want in quotes will appear in the body of your message between [h] [/h].
- **Quote** -- Click the quote button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want in quotes will appear in the body of your message between [Q] [/Q].
- **Bulleted List** -- Click the LI button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want to display as a bulleted item will appear in the body of your message following [LI].

- **Indented Bulleted List** -- Click the unordered list button. The formatting codes [bullet][/bullet] will appear. Then, click the LI button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want to display as a bulleted item will appear in the body of your message following [LI]. To get indented bullets, cut the text following the [LI] codes, and paste this text in between the [bullet][/bullet] codes.
- **Numbered List** -- Click the numbered list button. The formatting codes [num][/num] will appear. Then, click the LI button. Type your text in the Explorer User Prompt window that appears, and click OK. The text you want to display as a numbered list will appear in the body of your message following [LI]. To get the numbered list, cut the text following the [LI] codes, and paste this text in between the [num][/num] codes.
- **Smiley and Frowny Faces** -- If you want to display a colorful version of the well-known smiley or frowny e-mail emoticons, you can type :) or :(in the body of your message, and that string of text is automatically converted to an icon. Use the following syntax (enter only the first two characters in your message), or select your emoticon from the pull-down list next to the Emotion button:

  :((Frown)
  :) (Smile)

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:o (Embarrassment)
:D (Big Grin)
:| (Mad)
:Q (Shocked)
;) (Wink)
:P (Tongue)

6 If you click the 'Subscribe to this topic' checkbox, you will receive an e-mail each time a new message is added to the current topic. (The terms *thread* and *topic* are used interchangeably.) This way you can quickly find out about new messages without having to be logged in and checking the topic constantly. (If you find that you are getting too many e-mail notifications about new messages, or you are no longer interested in this topic, return to this topic and take off the checkmark in this checkbox.)

7 When done typing your new message, click the Post Message button.

Your message will now appear as the first posting in a new topic area.

You can use the Back button to return to the view of the discussion forums. You can edit your new message as described below.

Editing your message

1 If you want to amend or edit your message, you can click on the Edit button, which appears under the messages that you have posted only. If you click the Edit button, you are returned to the New Post page shown in step 3 above, with the text of your message already loaded.

2 Once you are finished editing your message, click the Update button.

You can use the Back button to return to the view of the discussion forums.

You can also search for messages and users (page 110), edit your SageTalk user profile (page 111), or change your display and message settings (page 113) as described in the remainder of this chapter.

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Searching SageTalk

You can search all the messages within SageTalk for certain keywords and concepts, or you can search for all messages posted by a particular SageTalk user.

Search SageTalk as described in the following steps.

1 From the SageTalk Home page, or any page from which the Search tab is visible, click the Search tab.

The Search page is displayed.

2 If you are searching for messages posted by a particular username, enter the username in the ’Author’ field. If you are searching for messages containing a topic, concept, or keyword, enter that keyword in the ’Search Phrase’ field.

3 To restrict your search to messages within a particular forum category, select the desired category, or categories, from the ’Forum Categories’ listbox, by simultaneously pressing the CTRL key and highlighting the category. Or, use the Clear All or Select All buttons to deselect or select all of the categories.

4 Type the username or word that you are searching for in the ’Search Phrase’ field. For example, search for messages about printing by entering the keyword *Print*.

5 Restrict your search by date, by either selecting a value from the ’Search for messages posted in the last (Select) days’, or by entering a date range, typing the beginning of the date range in the Start Date field and typing the end of the date range in the End Date field.

6 Click the Search button.

If a message similar to the following appears:

No search were results found <u>back</u>

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the search was unable to find the username or word ("print" in this example) that you were searching for. Click the word back and search using a different keyword or username, or do not limit your search to one discussion forum category.

A search results page appears if the search was successful.

7 Scroll through the list of search results until you see a topic, originator name, or last post date that is of interest to you. Click on the topic name to view the messages attributed to that topic.

8 Use the Back button to return to the Search screen or navigate to a different page.

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Editing Your Profile

When you joined SageTalk, as described on page 89, you established your SageTalk profile. You can adjust your profile to switch your author icon, change your signature, or edit other personal profile information as described below. You cannot, however, change your user name.

Edit your profile as described in the following steps.

1 Login to SageTalk as described on page 92. The SageTalk Home page appears.

2 From the SageTalk Home page, or any other page where the Profile tab is visible, select the Profile tab.

The Your Profile page appears.

3 In the fields on the Your Profile page, you can change the following information by typing new text in each field:

- **First Name** -- Type your first name. You are limited to 35 characters.
- **Last Name** -- Type your last name. You are limited to 35 characters.
- **Password** -- Type your password. You are limited to 35 characters.
- **Verification** -- Retype your password.

- **City** -- Type your city of residence or business.

- **State/Province --** If you live in a U.S. state or territory, or Canada, you can select your state or province from the pull-down list.
- **Country** -- From the pull-down list, select your country. (For U.S. residents, you can click the list and press U six times to scroll to the United States entry, rather than scrolling to the bottom of the list.)
- **Time Zone** -- From the pull-down list, select your Greenwich Mean Time (GMT) time zone.
- **Time Zone Adjust --** Enter your Greenwich Mean Time offset, if applicable.
- **Website** -- If you or your company has a website URL, you can enter that URL here. The URL must start with http:// (in other words, enter a fully-qualified URL).
- **ICQ #** -- Type your ICQ number, if you have one. ICQ is a program (available free from www.icq.com) that notifies you when friends and associates are online and enables you to contact them. The ICQ number is assigned to you when you install ICQ.
- **AIM #** -- Type your AIM (AOL Instant Messenger) number, if you have one.

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Note Your e-mail address must be unique within BestTalk. Another user cannot share your e-mail address.

- **Email Address** -- Type your e-mail address. Each new SageTalk registration requires a unique e-mail address.
- **Profile Visibility** -- Select this checkbox if you want other users to be able to click the View profile icon next to any of your forum messages. Other users are then able to see certain details about your SageTalk profile, such as nickname, city, country, website, date you joined SageTalk, and ICQ #.
- **E-mail Visibility** -- Select this checkbox if you want other users to able to see your e-mail address by clicking the View Profile button next to any of your forum messages.
- **Buddy List** -- Select the 'Yes' radio button to turn on the Buddy List. This feature allows you to create a list of forum buddies in the Private Message area. A floating window called "Buddy List" will appear, listing your buddies. You will be able to see if your friends are on-line, and if there are any new private messages for you.
- **Allow Private Message** -- Select the 'Yes' radio button to allow others to send you private messages using the private messaging module.
- **Allow Others to Rate You** -- Select the 'Yes' radio button to allow others to rate your postings and responses.
- **Signature** -- If you would like signature text, such as your name and company name, to appear at the bottom of each message you post, type your signature text in the Signature field.
- **Select the author icon you wish to use** -- Select the icon you would like to appear next to the messages that you post in SageTalk. Click on one of the many character faces shown to select your icon.

4 Click the Update Profile button.

If not all of the required information was entered on the Your Profile form, or the e-mail address was not valid or unique, a screen appears, requesting that you attempt changing your profile again.

If you see the above message, use your Browser's Back button to return to the Your Profile screen. Make sure all required fields have valid entries and press the Update button again.

If all the required information was entered on the Your Profile form, and the e-mail address was valid and unique, a screen appears, confirming your successful update.

Your new author icon and other changes are immediately in effect.

5 Choose one of the other tabs to navigate to another SageTalk page. For example, choose Home to re-enter the forums with your new personal profile settings in effect. Or change your screen and message display options as described in the next section.

Customizing Your Settings

Messages, member names, and most text in SageTalk is displayed in black against a light foreground for readability. However, you can adjust the color of the background and SageTalk controls by customizing your settings. You can also change the sort order of messages, as well as the speed of graphics displayed, by customizing your settings.

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Customize your settings as described in the following steps.

1 Login to SageTalk as described on page 92. The SageTalk Home page appears.

2 From the SageTalk Home page, or any other page where the Profile tab is visible, select the Profile tab.

The Customization page appears.

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3 In the fields on the Customization page, type new text in each field or select radio buttons or pull-down menus to change the following information:

- **Color/Font Choices** -- This section affects the color and font of the tabs, button, and menu bars throughout SageTalk. By default, SageTalk's main color choice is green. You can select black, blue, brown, orange, purple, or red for your screen, if you want to change the color of the SageTalk controls and some of the foreground features.
- **Background Shade** -- Select 'Light' or 'Dark', based on the 'Background Color' that you selected in the previous section. If the Background Shade is 'Dark', then the text color appearing in the background will be white, making it more visible and easier to read.

- **I would like to see the last *xx* days of topics when I enter a category --** This setting affects how you see aging message threads. (The terms *thread* and *topic* are used interchangeably.) If you would like to see only the last day of threads, enter 1 for *xx* in the last *xx* days of threads field. For the last year of threads, enter 365. You can enter a number from 1 to 9999 in this field.

- **How many topics do you want listed when you enter a category** -- This setting affects the number of topic names shown when you click into a particular discussion forum. You can enter from 1 to 100 into this field. You can cycle through the rest of the topics using the Next 20 button. If you want to see more threads, change the setting here.

- **How many messages do you want listed when you enter a thread** -- This setting affects how many messages and replies display when you click on a topic name. You can select from 1 to 100, or select Unlimited to display every response and message in a topic.

- **Would you like the messages sorted by date in Ascending order or Descending order** -- This setting affects the order in which messages are displayed when you enter a topic. By default, this setting is Ascending. When the messages are sorted in Ascending order by date, the oldest message is at the top of the list, and the subsequent replies to that message are displayed below, so you can read the original query and see the follow-up answers to that query.

- **Would you like to see most recent replied to thread on top** -- This setting affects whether the thread, or topic, with the most recent response activity is at the top of the list of topics within a discussion forum. By default, the setting is Yes.

- **If you are on a slow connection choose the standard graphics mode to make the forums faster for you** -- This setting is for the low bandwidth, or slow connection, users. If you choose standard mode, you will not see the author icons or the graphical toolbars in messages. Choosing standard mode increases the speed of page display. Enhanced mode displays all graphics, but takes a little longer to load. If you have a fast Internet connection, you might not notice any speed difference between standard and enhanced mode.

- **I want my topic subscriptions to be delivered to my private message box instead of by e-mail** -- Select the 'Yes' radio button to have your topic subscriptions delivered by the private message system instead of by e-mail. Note: this setting requires private messages to be enabled in your profile.

- **Would you like to draft your messages using the WYSIWYG Editor?** -- Select the 'Yes' radio button to allow you to draft messages using a WYSIWYG (What You See Is What You Get) editor. A WYSIWYG editor allows you to create a page of text so that you can see what the end result will look like while the interface or document is being created. This option is only available to Microsoft Internet Explorer users.

- **Turn the buddy list on or off** -- Select the 'On' radio button to turn on the Buddy List. This feature allows you to create a list of forum buddies in the Private Message area. A floating window called "Buddy List" will appear, listing your buddies. You will be able to see if your friends are on-line, and if there are any new private messages for you.

- **Default Forum View** -- This setting allows you to select the the default view you wish to view your forum in.

  -- Branch View: displays one of the parent-child relationship branch only.

  -- Threaded (All Messages): display of the parent-child relationship at the top of every topic, indicating the relationship of each message in the topic to its parent. Viewing all messages.

  -- Threaded (Single Messages): display of the parent-child relationship at the top of every topic, indicating the relationship of each message in the topic to its parent. Viewing only one message at at time.

  -- Linear: displays topics in the standard format in which a topic is started and people can reply to it but cannot alter the topic's subject.

- **Category Blocking** -- This setting allows you to select categories in the forum that do not interest you. Once selected, these categories will not be shown on the Home page. Click to select a category, or Shift-Click or Ctrl-Click to select multiple categories.

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- **Category Subscription** -- This setting allows you to subscribe to categories. If any new messages are submitted to the category you specified, you will be notified by e-mail.

4 Click the Customize! button.

A message appears, confirming your successful update. Your changes are immediately in effect.

5 Choose one of the other tabs to navigate to another SageTalk page. For example, choose Home to re-enter the forums with your new settings in effect.

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Viewing Online Help

Online Help is available in SageTalk. You can access this Help to learn more about using SageTalk. Much of this Help information is duplicated or explained in greater detail in this User Manual, but the Help screen of SageTalk is only a click away at any time you're using SageTalk.

View Help as described in the following steps.

1. Login to SageTalk as described on page 92.
2. From the SageTalk Home page, or any other page where the Help tab is visible, select the Help tab.

   The Help page appears in a separate browser window.
3. The right column of the Help page contains all the help text. You can jump to items of interest in the help text by clicking on one of the heading names in the left column of the Help page. Or, you can use the Page Down or Down Arrow keys to view the help text in the right column of the Help page.

E-Mailing the SageTalk Moderator

The SageTalk moderator has the right to remove inappropriate messages from the discussion forums. Compared to other users, the moderator also has a greater degree of technical expertise regarding the forums.

For most SageTalk questions, refer to this manual, or refer to Online Help, or post a message in a SageTalk forum. The Welcome to the SageTalk Forum is a good place for "how to use SageTalk" questions. However, if you have a comment for the SageTalk moderator about the content of a forum, or you are unable to use the SageTalk discussion forums or post a message due to technical difficulties, you can send an e-mail to the SageTalk moderator.

To send an e-mail to the SageTalk moderator, follow these steps:

1. Access the Help page as described in *Viewing Online Help* (page 118).
2. Scroll down to the New Users section of the Help page.
3. Click the moderator link, which is the underlined portion of the following sentence: If you wish to contact the forum moderator you can send an e-mail to carlos.roque@sage.com. An empty e-mail is generated to the address of the SageTalk moderator. Fill in the e-mail subject and message body.
4. Click the Send button.

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Viewing Other Users Currently Online

You can get a quick look at all others who are currently using SageTalk. This is especially useful if you are trying to determine if an individual is available to chat (see page 121 for chat instructions).

View online users as described in the following steps.

1. Login to SageTalk as described on page 92. The SageTalk Home page appears. From the SageTalk Home page, you can see the words *There are currently x users logged in*.

   For example, the top right portion of the screen might show 5 currently online users.

2. Click the underlined word "users."

3. The names and author icons of the currently online users shown on the left side. On the right side are icons you can use to learn more about each user or contact a user. These icons are explained below:

   View Profile -- To see information about the user, click the View Profile icon.

   Email User -- To send an e-mail to the user, click the Email User icon. You will be prompted to enter the text of your private message and then click a Send button.

   Message User -- To send a private SageTalk message to the user, click the Message User icon. You will be prompted to enter the text of your private message and then click a Done button.

   After you are done viewing currently online users, you can use the Back button to return to the Home page of the discussion forums, or you can attempt to chat with another currently online user, as described in the next section.

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Chatting

The Chat feature of SageTalk allows you to hold screen-based conversations with other SageTalk users who are currently online.

Chat as described in the following steps.

1 Login to SageTalk as described on page 92. The SageTalk Home page appears.

2 From the SageTalk Home page, or any other page where the Chat tab is visible, select the Chat tab.

3 After you click the Chat tab, the Chat page appears in a separate browser window.

The upper left portion of the Chat page is where the conversation can be observed.

The Input your message field at the bottom left of the page is where you type your chat sentences.

The name of the users available to chat appears at the right middle of the Chat page, under the heading Users.

The Chat Categories appear at the upper right of the Chat page. You can click on a Chat Category to open a Chat page specific to that category.

4 To enter a sentence into the chat, type the sentence in the Input your message here field.

5 Press Enter.

Your sentence appears in the upper left of the screen. Any other Chat user can type a sentence in response to yours, and that sentence will appear after yours.

To exit chat, close the Chat window by pressing Alt+F4 or clicking the Chat window close box.

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Using the Today Page

The Today page is a summary of what is happening in the forums as it relates to you. If you subscribed to threads, or have private messages, these will be displayed here. Another area of interest is Hot Threads, which are defined by a certain number of posts in the thread. Also listed is the top ten posters to the forums

Chat as described in the following steps.

1. Login to SageTalk as described on page 92. The SageTalk Home page appears.
2. From the SageTalk Home page, or any other page where the Today tab is visible, select the Today tab.
3. After you click the Today tab, the Today page appears.
4. Under the Private Messages heading, if you have a private message waiting for you, you will see the icon of the user who sent you the message, and the date on which the message was sent. If you have a private message waiting, click the icon under the word Read to view your private message. Once you view a private message, and click the Mark as Read button, the message will no longer appear on the Today page.
5. Under the Subscriptions heading, you will see a list of the message threads to which you are subscribed. To remove your subscription to one or more of these message threads, check the Unsubscribe checkbox to the thread. Then click the Unsubscribe button. The message thread you have marked will be removed from your Subscriptions list.
6. Under the Hot Threads heading, you will see a list of the message threads which have had 20 or more new messages added today. You can select these message threads to view the activity.
7. Under the Your Statistics heading, you can view information about your participation in the SageTalk forums.

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8 Under the Top Ten Posters heading, you can view information about the SageTalk members that are the most active participants in the SageTalk forums.

9 After you are done viewing the Today page, you can use the Back button to return to the Home page.

Logging Out of SageTalk

After you log in to SageTalk, as described on page 92, you remain logged in until you log out as described below. You can exit your Web browser or shut down your computer, but you do not need to log back in to SageTalk again, unless you explicitly log out. However, your username is not displayed to other SageTalk users as a "currently logged in" user unless you have the SageTalk website up on your Web browser screen.

You do not need to log out every time you leave SageTalk, but you might wish to log out to prevent other users of your computer from posting a message with your username.

Log out as described in the following steps.

1 Login to SageTalk as described on page 92. The SageTalk Home page appears.

2 From the SageTalk Home page, or any other page where the Logout tab is visible, select the Logout tab.

3 After you click the Logout tab, a Logout Confirmation dialog box appears.

4 Click OK on the Logout Confirmation dialog box.

A page appears confirming that you have successfully logged out of SageTalk.

You remain at the SageTalk website, but you no longer have the privileges of a logged in SageTalk member. You can still view messages, but must log back in to respond or post new messages.

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Chapter 9

Taking the CS Survey

Sage wants to know how you feel about the quality of support you receive from Sage CS analysts. You can let Sage know how well you were treated, and how your software problems were addressed, by taking the Customer Support survey on Sage Software Online.

The survey is intended for customers or resellers who required telephone support from Sage. You will be asked to supply the case number of your particular support call.

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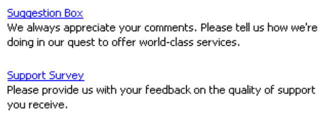
Where to Begin

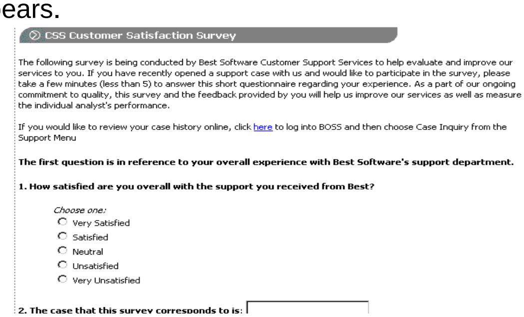
To take the CS Survey, follow these steps:

1 Login to Sage Software Online and choose a product-specific support page as described in *Logging Into Sage Software Online* in Chapter 2. For example, choose the MAS 90 and MAS 200 support link.

2 Locate the Support Survey link on the right side of the page, under the ’Feedback’ section.



3 Click the CS Survey link. The Customer Satisfaction Survey page appears.



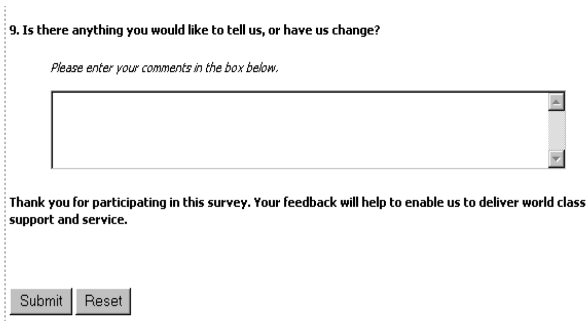
4 Read each numbered statement or question, starting with 1, and click on one of the radio buttons immediately below to indicate your satisfaction level.

5 Scroll down to reveal the next portion of the survey.

6 In response to the question "The case that this survey corresponds to is" type the case number of the particular support call that you would like to comment on.

7 Continue reading the numbered questions, and clicking a radio button to indicate your response, until you have responded to each numbered statement.

8 The last part of the survey is a comment box labeled "Please enter your comments in the box below". Type any other comments you have about Sage CS into this comment box at the bottom of the survey, which is shown below.



9 To send your completed survey to Sage, click the Submit button. If you want to clear all your entries and responses and start the survey again, press the Reset button, then press the Home key to return to the top of the survey page.

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After you press the Submit button, the following thank-you screen appears.

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