

## Making the Most of Your Support Experience

Effective 9/01/05



## Sage Timberline Office Customer Support Guide

Sage Software is committed to your satisfaction, and our customer support team is ready to provide you with award-winning service. Our team of highly skilled professionals has access to a wide range of tools to help answer your questions quickly and completely. All of our customer support analysts receive extensive training and testing before they take their first phone call.

You can contact Sage Timberline Office Customer Support by telephone, e-mail, fax or Web interface.

### Before You Contact Support

Before you decide to contact customer support, gather as much information as you can about your problem or error message. You have access to our Technical Support Knowledgebase, Help (which is included with your software), and many other resources that enable you to answer questions or troubleshoot problems on your own. These services are available 24 hours a day, seven days a week. Please see below for detailed information about resources in addition to our Customer Support analysts that are available to help you.

- **Sage Timberline Office Help**—You can access help about specific procedures, topics, fields, or buttons from anywhere in the software.
- **Technical Support Knowledgebase**—Our staff maintains an extensive knowledge database of frequently asked questions, solutions to problems, and source documents. You have access to this knowledgebase at [www.timberline.com](http://www.timberline.com) or via HELP in the software. Learn how to search for solutions and find the latest information on issues you may be having. You will need your client identification number.
- **Technical Documentation Available on the Software CDs**—We include technical documentation on the software CDs that we ship to you. Learn how to find this information quickly.
- **Sage Timberline Office Conferences**—Our clients work together to help each other solve problems, streamline their business workflows, and share best practices. Take advantage of—and contribute to—the wealth of knowledge our clients have acquired. Check our Web site for current conference information.
- **Timberline Users Group**—This independently organized group of Sage Timberline Office clients meets regularly and has a Web site to help you find solutions. Find other clients with similar interests and issues.

### Prepare to Contact Support

The following information is designed to help you get your software questions and issues resolved in a timely manner and to save you valuable work time in the process.

When you call customer support, our call routing system or a customer support analyst will ask you for the following information. Be prepared to answer these questions each time you call.



Question	How to Find the Answer
What is your client number?	Your client number can be found on correspondence you receive from Sage Software. If you cannot locate your client number, a customer support analyst can look it up for you.
What CD version are you using?	To find the version of the accounting and management products CD, open TSMMain; then click <b>Help &gt; About TS-Main</b> and note the number next to <b>CD Version</b> . To find the version of the estimating products CD, open Estimating Extended or Estimating Standard; then click <b>Help &gt; About Estimating</b> and note the number next to <b>Version</b> . You can also right-click the estimating icon for a more detailed number.
What is the problem?	Walk through the steps you completed in exact detail. Involve the person who originally noticed the problem or received the error message so that your description can be as accurate as possible.
Is there an error message?	Write down the exact wording of the message. You can check the Sage Timberline Office System Log for this information. In the application in which you were working, select <b>Help &gt; System Log</b> and scroll through the file to find the error message.
Is this the first time the problem has happened? Does the problem happen on only one workstation or several?	Ask other operators if they have experienced the same problem. Have them check their workstations to see whether they see the problem. Also, have the original operator try other workstations to see whether the problem is specific to that operator.
Has anything changed with your software, hardware, or workflow?	Ask your network administrator for technical information regarding anything that may have changed behind the scenes: upgrades to Sage Timberline Office applications, new third-party software installations, moving of data from one server to another, new printers or print driver installation, or anything else that might affect the network.
Can you reproduce the issue?	Walk through the same steps that led to the problem and see whether it happens again. Try this on other workstations.
Does the problem happen in the sample data sets?	In the application in which you were working, select <b>File &gt; Open Data Folder</b> and choose one of the sample data sets that came with the software. Perform the same steps that led to the problem to see whether it occurs in the sample data.



For technical or network problems such as computer freezing or locking, printer problems, or applications ending suddenly, answer the following questions as well.

Question	How to Find the Answer
What kind of network are you using?	Contact your network administrator.
What operating system is on your computer?	On your computer click <b>[Start]</b> , click <b>[Run]</b> , type <b>winver</b> and click <b>[OK]</b> .
What printers and print drivers are installed?	Contact your network administrator.
When was your last backup?	Contact your network administrator.

### Contact Customer Support

To contact Sage Timberline Office Customer Support, use the telephone numbers or e-mail addresses below. For information about Sage Timberline Office service plans, call **800-858-7098**.

#### United States and Canada

Toll Free: 800-551-8307  
Phone: 503-533-2181  
Fax: 503-439-5333  
E-mail: [support.timberline@sage.com](mailto:support.timberline@sage.com)

#### International

Phone: 503-533-2181  
Fax: 503-439-5333  
E-mail: [support.timberline@sage.com](mailto:support.timberline@sage.com)

#### Asia Pacific

Phone: 1 800-1-20369  
Fax: +503-439-5763  
E-mail: [australia.support@sage.com](mailto:australia.support@sage.com)

### Customer Support Hours

Telephone support is available Monday through Friday from 6 a.m. to 5 p.m. Pacific time, with the following exceptions:

- Every Thursday from 2 p.m. to 3 p.m. Pacific time, when customer support is closed for staff meetings.
- Standard United States holidays.
- Staff development days, during which support analysts are involved in additional product training and professional development (three days per year).
- Quarterly company meetings.

At the beginning of each calendar year, you will receive a letter that informs you of the dates that Sage timberline Office Customer Support will be closed during the year. This information is also available on our Web site. Log on to [www.sagetimberlineoffice.com](http://www.sagetimberlineoffice.com) and click **Support Closure Dates**.



## Customer Support Call Responses

Support's goal is to answer inbound customer telephone calls within the first four minutes. Once calls are answered, analysts resolve over 80% of questions within 20 minutes. If unable to resolve within 20 minutes, the customer's call will be placed on the escalation list for a callback by another support analyst. Our goal is to contact 80% of the escalation calls within eight business hours.

Our customer support team relies on a call priority system to identify call urgency and responds accordingly. Call urgencies range from a simple explanation of software settings to critical situations in which work is stopped or data integrity is compromised. The table below lists our support call priorities and the response you can expect to receive from a customer support analyst.

Priority	Definition
1	Urgent. For incidents saved to the escalated call list that are given first priority. <u>Example:</u> Your system is down, processing has stopped and you are unable to perform an urgent task or a Sage Timberline Office Certified Consultant is onsite.
2	Urgent Customer Request of Call Back. For incidents saved to the escalated call list that are given second priority. <u>Example:</u> You have a government report due in a limited timeframe or we have asked you to call us back on your open incident.
3	Important. For incidents saved to the escalated call list that are important but software operations can continue without immediate resolution. <u>Example:</u> New Payroll deduction setup required before printing payroll checks later in the week.

The customer support team maintains an online escalation list to identify, track, and respond to unresolved customer software issues. If at any time a client should need immediate assistance on an open issue, the client should contact customer support at 800-551-8307, select 0 and enter the extension of the analyst who is working on your issue. Incident status requests can also be sent by email to [support.timberline@sage.com](mailto:support.timberline@sage.com). Please include your customer number and incident number.

## Guidelines for Supported Issues and Categories

When you encounter issues with software, the cause can be related to an external circumstance rather than to Sage Timberline Office. For example, the problem may be with your network hardware or configuration, other software you have installed, or a workstation's operating system. Our support team members will do whatever they reasonably can to keep your software up and running, but some issues reach beyond what is included with your service plan. If you encounter difficulties that you cannot resolve through the technical support team, a Sage Timberline Office Certified Consultant is best able to assist you with problems specific to your setup or operation.

The following sections describe the categories of issues that the customer support team can address.



### Sage Timberline Office Software

#### Topics Covered

- Current and immediately prior software versions are supported.
- Note:  
Year-end software versions may only be available in the current version.
- General Sage Timberline Office Software configuration questions.
- "How-do-I" type questions.
- Sage Timberline Office error or warning messages occurring within software.
- Suggestions on source of reconciliation difficulties.

#### Topics Not Covered

- Versions prior to the immediately preceding versions are not supported.
- Example:  
Both versions 9x and 8x would be supported. 7x and prior versions would not be supported.
- Design or detailed configuration of customer database.
- Training or Tutorials on the function and use of Sage Timberline Office Software.
- Performing reconciliation of Sage Timberline Office Software modules.
- Performing reconciliation of external reports to Sage Timberline Office.

### Sage Timberline Office Crystal Decisions Writer and Report Designer

#### Topics Covered

- "How-do-I" type questions.
- Functionality of Sage Timberline Office canned reports (the report works the way it was intended to work).
- Troubleshooting the Report Designer and Crystal applications.
- Crystal Decisions and Report Writer installation and linking to Sage Timberline Office data.
- Any situation where there is a known issue or potential issues with a canned report.

#### Topics Not Covered

- Creation of or modification of reports.
- Modified canned reports.
- Custom report upgrades.
- Design or setup of reports or data Extracts using Crystal Decisions.

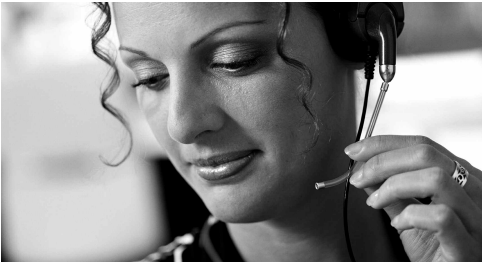
### Installation

#### Topics Covered

- Operating Systems as they relate to Sage Timberline Office installs and functionality.

#### Topics Not Covered

- Operating system installation or configuration.
- Installation or configuration of software not purchased from Sage Software or a Sage Timberline Office reseller.
- Configuration of TCP/IP or other communication protocols.



## Printers

### Topics Covered

- Troubleshooting software printing error messages or malfunction.
- Standard installation of Sage Timberline Office recommended print drivers.

### Topics Not Covered

- Recommendations on printer purchases other than what is defined in the Technical Support Knowledgebase. (This information can be found in the Technical System Reference guide on the software CD).

## Networks

### Topics Covered

- Accessing Sage Timberline Office software over a supported network.

### Topics Not Covered

- Assistance with non-supported networks.

## ODBC

### Topics Covered

- Setting up a successful DSN connection. The Sage Timberline Office ODBC driver has been purchased.
- Create a DSN to ensure accessibility of Sage Timberline Office data in Microsoft Access or Excel.

### Topics Not Covered

- Creation, configuration or troubleshooting of tables or queries.

## Third Party Software

### Topics Covered

- Troubleshooting software errors that occur during data transfer.

### Topics Not Covered

- Installation, configuration, or use of third party software.

## Continuous Improvement of Technical Support

For the past four years, Sage Timberline Office Technical Support has earned the Support Center Practices (SCP) Certification for excellence in providing technical support to its customers. SCP Certification ensures that customers receive a level of software support that is comparable to the best in the business, as measured by best practices standards for the technology industry. Criteria include overall customer satisfaction as well as performance measurements such as how quickly we respond to your questions, and how quickly we resolve your issues.

The company's re-certification underscores a high level of commitment to continuous improvement in customer support. We frequently seek feedback from our clients so we can deliver a higher level of service to you. At the conclusion of selected support incidents, you may receive a customer satisfaction survey. Please help us by answering the survey and sending suggestions on how we can better serve you.