

# Sage Construction and Real Estate Solutions



## Customer Support Guide

Experience a customer support organization that is committed to your satisfaction and is ready to provide award-winning service. The Sage Construction and Real Estate support team is comprised of highly skilled professionals who can answer your questions quickly to keep your system operating at maximum efficiency. Because all of our analysts receive extensive training and testing before they take their first phone call and have access to a wide range of comprehensive tools, you can be assured that you will obtain the most knowledgeable, up-to-date information available.

### Before You Contact Customer 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 Sage Knowledgebase, an on-line 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 the resources, in addition to our Customer Support analysts, that are available to help you.

**Sage Timberline Office and Sage Master Builder Help**—You can access help about specific procedures, topics, fields, or buttons from anywhere in the software.

**Sage 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.sagecre.com](http://www.sagecre.com) or through the Help menu in the software. Search for solutions and find the latest information on issues you may be having.

**Technical Documentation Available on the Software CDs**—A number of user guides are included on the software CDs we ship to you. Important release information such as system requirements, software enhancements, and more can be accessed quickly and easily.

**Sage Summit Customer Conference**—Interact with and learn from Sage Construction and Real Estate senior leadership, product experts, and fellow customers in one location. Get the latest on product updates as well as network and share experiences with your peers. Check our Web site for current conference information. If you are a PremierCare subscriber, you receive a 20% discount to this conference if you enroll during the Super Saver period.

**Local Users Groups**—Interact with peers and business partners to network, share ideas, and solve problems. Additionally, an independently organized group of Sage Timberline Office clients, the Timberline Users Group (TUG), meets regularly to discuss issues relating to their software. To learn more, visit the group's Web site at [www.tugweb.com](http://www.tugweb.com).

### Prepare to Contact Customer 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 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 ID number?	Your client ID number can be found on correspondence you receive from Sage. If you cannot locate your client number, a customer support analyst can look it up for you.
What CD version are you using?	<p><b>Sage Timberline Office:</b> To find the version of the accounting products, open TSMain; click <b>Help &gt; About TS-Main</b> and note the number next to CD Version. To find the version of the estimating products, open Estimating; click <b>Help &gt; About Estimating</b> and note the number next to Version. You can also right-click the estimating icon for a more detailed version number.</p> <p><b>Sage Master Builder:</b> To find the version, open Sage Master Builder; click <b>Help &gt; About Sage Master Builder</b> and note the number next to version within the parenthesis.</p>
What application are you calling about?	Identifying the application that you are calling about will help you navigate quickly through our telephone menu prompts. See Pg. 7 of this guide for speed dial tips for Sage Timberline Office.
How can we help you?	Walk through the exact steps you completed with as much detail and accuracy as possible.
Is there an error message?	Write down the exact wording of the message. For Sage Timberline Office, 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
Can you reproduce the issue?	Walk through the same steps that led to the problem and see whether it happens again.
Is this the first time the problem has happened? Does the problem occur on one workstation or several?	Ask other operators if they have experienced the same problem. Have them test at their workstation to see if they experience the same 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 or Sage Master Builder 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.



Question	How to Find the Answer
Does the problem happen in the sample data sets?	<p><b>Sage Timberline Office:</b> In the application in which you were working, select <b>File &gt; Open Company</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 while using the sample data.</p> <p><b>Sage Master Builder:</b> Select <b>File&gt; Open Company</b>, then change the drive letter on the dropdown to C:, select Sample Company.</p>

For technical or network problems such as computer freezing or locking, printer problems, or applications ending suddenly, please 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?	<p><b>For XP:</b> Click <b>[Start]</b>, click <b>[Run]</b>, type winver and click <b>[OK]</b>.</p> <p><b>For Vista:</b> Click <b>[Start]</b>, type winver in the 'start search' window and click <b>[OK]</b>.</p>
What printers and print drivers are installed?	Contact your network administrator.
When was your last backup?	Contact your network administrator.

**Guidelines for Supported Issues and Categories**

When you encounter issues with your Sage Construction and Real Estate software, the cause can sometimes be related to an external circumstance rather than to the software itself. For example, the problem may be with your network hardware or configuration, other software you have installed, or a workstation's operating system. Our customer support team members will do whatever they reasonably can to keep your system up and running, but some issues reach beyond the support included with your service plan. If you encounter difficulties that you cannot resolve through the technical support team, one of our certified consultants can 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.



<b>Versions Supported</b>	
<b>Topics Covered</b>	<b>Topics Not Covered</b>
<p>We provide support on the two most recent mass shipment releases (the current version and one prior).</p> <p>General Sage software configuration questions.</p> <p>"How-do-I" type questions.</p> <p>Error or warning messages occurring within software.</p> <p>Suggestions on source of reconciliation difficulties.</p>	<p>Design or detailed configuration of customer database.</p> <p>Training or tutorials on the function and use of Sage software.</p> <p>Performing reconciliation of Sage software modules.</p> <p>Performing reconciliation of external reports to Sage software.</p>
<b>Sage Timberline Office Crystal Decisions Writer and Report Designer Sage Master Builder Report Writer and Form/Report Page Design</b>	
<b>Topics Covered</b>	<b>Topics Not Covered</b>
<p>"How-do-I" type questions.</p> <p>Functionality of default Sage reports (the report works the way it was intended to work).</p> <p>Troubleshooting the Report Designer, Report Writer, and Crystal applications.</p> <p>Crystal Decisions and Report Writer installation and linking to Sage Timberline Office data.</p> <p>Report Writer and Form/Report Page Design linking to Sage Master Builder data.</p> <p>Any situation where there is a known issue or potential issues with default Sage reports.</p>	<p>Creation of or modification of reports.</p> <p>Troubleshooting modified reports.</p> <p>Custom report upgrades.</p> <p>Design or setup of data.</p> <p>Extracts using Crystal Decisions.</p>
<b>Installation</b>	
<b>Topics Covered</b>	<b>Topics Not Covered</b>
<p>Operating Systems as they relate to Sage installs and functionality.</p>	<p>Operating system installation or configuration.</p> <p>Installation or configuration of software not purchased from Sage or a Sage Business Partner.</p> <p>Configuration of TCP/IP or other communication protocols.</p>



Printers	
Topics Covered	Topics Not Covered
Troubleshooting software printing error messages or malfunction.  Standard installation of Sage Construction and Real Estate recommended print drivers.	Recommendations on printer purchases other than what is defined in the Sage Knowledgebase.
Networks	
Topics Covered	Topics Not Covered
Accessing Sage Construction and Real Estate software over a supported network.	Assistance with non-supported networks..
ODBC	
Topics Covered	Topics Not Covered
Setting up a successful DSN connection.  Create a DSN to ensure accessibility of Sage Timberline Office data in Microsoft Access or Excel.	Creation, configuration or troubleshooting of tables or queries.
Third-Party Software	
Topics Covered	Topics Not Covered
Troubleshooting software errors that occur during data transfer.	Installation, configuration, or use of third-party software.

**Customer Support Call Responses**

Our goal is to answer inbound customer telephone calls within the first three minutes. Once calls are answered, analysts resolve over 90% of questions during the first interaction. If unable to resolve, the analyst will take care of you personally by placing your call in their in-progress log for further research and follow up. The support analyst will stay in contact with you until a resolution or agreement can be reached.



Our customer support team works with you 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	Response you can expect
Very High	You are unable to conduct business until this issue is resolved. <b>Example:</b> Your system is down, processing has stopped, and you are unable to perform an urgent task or a Sage Construction and Real Estate Certified Consultant is onsite.	We work diligently with any resources needed to get your system functioning again.
High	Your issue is of a timely nature; however, your system is not down. <b>Example:</b> You have a government report due in a limited timeframe or we have asked you to call us back on your open incident.	Your issue is a priority to us, and we work with you to resolve it in a timely manner.
Medium	Your issue is very important; however, your software operations can continue without immediate resolution. <b>Example:</b> New Payroll deduction setup required before printing payroll checks later in the week.	We work with you to resolve your issue in a timely manner.
Low	Your issue is important and your software operations can continue without immediate resolution. <b>Example:</b> You want to know more about a feature that you may implement later.	We work with you to answer your questions in a timely manner.

You may check the status of an open support ticket, update new information you've discovered on an open issue, or create a non-urgent request for help online. Just visit [www.sagecre.com](http://www.sagecre.com) and click Logon. Next, select the Support tab and choose the Self Service button.



**Contact Customer Support**

**United States and Canada**

www.sagecre.com

Sage Timberline Office toll free: 800-551-8307

Sage Master Builder toll free: 800-866-8049

International: 503-690-6775

For Sage Timberline Office, you can use this speed-dial menu list to help you quickly reach the most qualified analyst when calling into Customer Support for a new technical support question. After you enter your client ID, use the speed-dial numbers to immediately by-pass the entire menu and go directly to the support area you want to reach.

For assistance with	Speed Dial
Accounts Receivables, Contracts, or Billings	32
Accounts Payable	21
Cash Management	23
Document Management	24
Estimating	1
General Ledger	22
Job Cost	41
Networking, Operating Systems, Installation, or Activation Codes	7
Payroll	31
Project Management	42
Property Management or Residential Management	6
Purchase Order or Inventory	51
Service Management	52
For Other Assistance	0

Keep in mind, for reporting, ODBC, Address Book, and / or file doctor it is best to select the application that best applies where the data is being produced.

**For information about service plans**

Call 800-858-7098

Sage Timberline Office press 1.

Sage Master Builder press 2.



### Customer Support Hours

Online support incidents can be submitted 24 hours a day, seven days a week by logging on to [www.customers.sagenorthamerica.com](http://www.customers.sagenorthamerica.com). Our customer support team will reply to your questions during normal 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.
- Quarterly company meetings.

You will also be kept informed of the dates that Sage Construction and Real Estate support will be closed via our regular customer e-newsletters. This information is available online at [www.sagecre.com](http://www.sagecre.com) as well.

### Sage Construction and Real Estate Customer Support: Continually improving for you

At Sage, we understand that your success is our success. We want to help you drive business productivity and profitability. So, our goal is simple—to offer unparalleled support and services to our customers for the life of their software.

We always strive to provide the most effective and responsive technical support and a broad range of resources. When you invest in Sage, we make a commitment to be with you every step of the way as you implement, deploy, and use your software now and far into the future. And this commitment is backed by our customer care organization that rates second to none among the world's premier software organizations.

We frequently seek feedback from our clients to discover ways that we can deliver a higher level of service. 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.