Sage Technical Support Service Guide

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THIS TECHNICAL SUPPORT SERVICE GUIDE ("Guide") by Sage South Africa (Pty) Ltd ("Sage"), with its principal place of business located at Gateway West Offices, 6th Floor Reception, 22 Magwa Crescent, Waterfall City, Midrand, does not constitute a binding agreement and may be updated by Sage as required, from time to time.

Sage may provide the following Support Services to a Customer subject to this Guide:

I.   Access to Sage Periodic Software Updates for our accounting and payroll products.
II. Access to timeous payroll software updates that conforms to new statutory requirements; where Sage shall endeavour to the best of its ability to make available prior to the date of coming into operation of the legislation in question.
III. Access to Technical Support knowledge articles and release notes via online knowledge platforms 24/7.
IV. Access to Technical Support services via telephone, chat, and email (where applicable) during Business Hours.

This Guide is merely for reference purposes, is subject to change from time to time and does not constitute a binding agreement.

1. **Definitions:**
    Capitalised terms defined herein, shall bear the meaning ascribed to such term below, unless the context otherwise requires:

    1.1   "Authorised User" means the designated person identified by the Customer who is designated as the Sage Software advanced user for all operational and functionality use designed to meet the business objectives of the Customer.

    1.2   "Business Hours" means the duration of service between 8:00 A.M. to 5:00 P.M. (GMT + 2) Monday – Thursday, and 8:00 A.M. to 4:00 P.M. (GMT + 2) on a Friday. Excluding public and bank holidays gazetted by the South African government excluding P1 support requests as defined below which will be managed outside of normal office hours (if so required) as and when they occur.

    1.3   "Customer" shall mean the licensee or Customer making use of the Software procured under the applicable Order.

    1.4   "Consultation/Consulting Services" means chargeable services rendered either onsite or remotely by an associated Sage Business Partner, procured under a separate agreement.

    1.5   "Consultant Support" means a set of chargeable services rendered to fulfil post implementation and configuration support for a Sage product. This may include assisting with processing management, custom configuration or application management, release and update implementation, integration management and/or reporting tool management.

    1.6   "Data Backup" or "Data Backups" means a copy of a file, file system, Microsoft SQL database or other resources that would need to be restored in the event of a system failure or loss to ensure business continuity or further investigation.

    1.7   "Defect" or "Software Defect" means that a functionality or feature deviates from the expected outcome of the Software designed scope.

    1.8   "Error" means the onscreen notification to alert the user about an unexpected action, or restricted action or a warning requiring user intervention.

1.9 "Enhancement Request" means a request to alter or amend a feature within the Software defined scope.

1.10 "Impact" means the percentage of users (or employee records) affected by an event requiring Error and Issue diagnosis.

1.11 "Issue" means an unexplainable event has taken place preventing the expected outcome from being achieved.

1.12 "Knowledge Article" means an information source either written or visual with and not limited to answers to commons questions, tutorials to use and explain a feature, or procedures to troubleshoot and resolve Support Requests.

1.13 "Knowledgebase" means an online digital platform that contains a collection of articles that is accessible by Sage Customers to self-solve related Error messages, to learn how to use a Sage product, view software updates, release notes or general Sage Software information.

1.14 "Periodic Software Updates" means the provision of releasing updates annually, bi-annually or where statutory or legislative requirements encourage changes to be made to the software applications provided by Sage.

1.15 "Sage Business Partner" means an independent third party authorised or certified by Sage to act as a Reseller or distributor of the Software and may provide consulting, implementation and support services.

1.16 "Sage Online Digital Platform" a consolidated term for Sage City, Sage Knowledge and Email Newsletters and Snippets used to communicate important information and updates.

1.17 "Sage Software" shall mean the computer programs licensed to the Customer by Sage under the terms of the applicable agreement, including any upgrades, modifications, enhancements or corrections thereto, in accordance with the specific provisions of the agreement, in machine readable object code form, and/or any part thereof and any back-up copies made in accordance with the agreement.

1.18 "Self-Service" means the ability performed by the Customer to access Sage Online Digital Platform to search and find the answers to solve their Support Requests.

1.19 "Support Request" or "Support Requests" means the official log for assistance with Sage. Each Support Request will be assigned a unique reference number to track the Resolution Process.

1.20 "Resolution Process" means the process in which a Support Request is resolved.

1.21 "Technical Support" means the nature of service provided by Sage to solve Error and Issue Support Requests and facilitate software maintenance requests.

1.22 "Urgency" shall mean the criticality of a business process or objective that may not be operational by an event requiring Error and Issue diagnosis.

2. **Technical Support Scope and Availability:**

2.1 First Line Operations Support Contact Information:

2.1.1 Customers should contact their linked Sage Business Partner before contacting Sage with the intent to verify the Support Request in relation to the software configuration or customizations that has been implemented.

2.1.2 As a preventative measure, where the first contact is made with Sage to resolve a Support Request our Technical Support team will evaluate the Support Request, and may contact your linked Sage Business Partner for further guidance or assistance in resolving the said Support Request.

2.1.3   In the event that the customer is not linked to a Sage Business Partner directly, Sage will then assist with Technical Support Services in terms of this Guide. Refer to the list of Exclusions to Technical Support Services whereby Sage will facilitate fulfilment of support with a Sage Business Partner that will require additional Consultant Support under a separate agreement.

2.2   Contact information for Technical Support for our Sage Medium Products.

Sage Medium Product	Phone	Email (Webform)	Chat	Chat Bot
Sage 200 Evolution	Call 011 304 3000 and follow the voice prompts	**Log a Support Request via a webform**	Login into the Customer & Reseller Zone to access	Not available
Sage 200 VIP (Includes Cobol, Premier, Info slip & Skills Map).	Call 012 420 7000, press 2 for support enter the side code and follow prompts	**Log a Support Request via a webform**	Login into the Customer Zone to access	Chat to Pegg within the application
Sage Business Cloud Payroll Professional	Call 012 420 7000, press 2 for support enter the side code and follow prompts	**Log a Support Case via a Webform**	Accessible in the application	Chat to Pegg within the application
Sage 300 Accounting (Includes Sage 300 retail)	Support Request via a webform preferred	**Log a Support Request via a webform**	Not available	Not available
Sage 300 People	Call 012 420 7000, press 2 for support enter the side code and follow prompts	**Log a Support Request via a webform**	Accessible in the application	Not available
Sage CRM	Support Request via a webform preferred	**Log a Support Request via a webform**	Not available	Not available
Sage X3	Support Request via a webform preferred	**Log a Support Request via a webform**	Not available	Not available
Sage X3 Payroll & HR	Support Request via a webform preferred	**Log a Support Request via a webform**	Not available	Not available

2.3   Technical Support service(s) covered in this Guide are accessible through the following channels:

2.3.1   Online knowledge support:

2.3.1.1.   Sage knowledge support is available 24/7 through our Technical Support category 1 resources which include Self-Service options, like Sage City, in-product help files, our support website, and online Knowledgebase platforms. These may change from time to time as platforms develop and improve and communication of any such changes will be shared with the customer.

2.3.1.2.   Online knowledge channels

Sage City	Sage Knowledgebase	Sage University
Find communication updates or discussions for a Sage Product, or chat to our Sage community.	Find information or solutions relevant for a Sage Product.	Learn more about a Sage product with a formal certification (charges may apply).

2.3.2   Telephone support (where applicable):

2.3.2.1.   Telephone call received are monitored and serviced within Business Hours.

2.3.2.2.   Sage encourages the use of email and Sage Online Digital Platforms for assistance outside of Business Hours.

2.3.3   Email support (via a web form):

2.3.3.1.   Emails received are monitored and serviced within Business Hours.

2.3.3.2.   Outside of Business Hours emails will be collected and serviced during the following day.

2.3.3.3.   Emails are best used for investigative and complex support queries. In the event further engagement is required this will be redirected to the use of Telephone Support or a remote meeting at a scheduled time and followed through with email communication.

2.3.4   Chat support (where applicable):

2.3.4.1.   Chats are reserved for quick answers to simple questions that do not require any investigation or exploration.

2.3.4.2.   In-depth and complex questions will be redirected to the use of our web forms.

2.3.4.3.   Chats received are monitored and serviced within Business Hours.

3. Standard Technical Support Service:

3.1 The Sage Technical Support team is trained to solve complex Technical Support queries, facilitate software maintenance requests and contribute to growing our Sage Knowledgebase to better serve our Sage customers.

3.2 Technical Support requirements are categorised into 3 categories based on the nature of the support required and further determine the type of support that will be provided as follows:

Support Category	Nature of Support Requirement	Support Offered	How Sage will help
Category 1	• How-to use the software • FAQs • Webinars on specific functionality • Known errors • Downloads and history of changes/release notes	Online knowledge platforms	Guidance and knowledge
Category 2	• On-screen errors that affect functionality • An Issue that requires root- • cause analysis	Sage Technical Support team	Investigate, diagnose, help
Category 3	• Patch or update request to solve a software bug • Request for new or amended software functionality • Development assistance to diagnose complex issues	Sage Technical Support team, who may escalate to the Sage Product Development teams	Product fixes and updates

3.3 Category 1 support requirements should be managed within the Customer's operational and administration teams and by a designated internal Authorised User.

3.4 The Customers designated Authorised User will have access to online support content and platforms and are required to maintain acceptable technical knowledge to effectively administer the Sage solution.

3.5 Online knowledge resources are updated weekly. It is the Customer's responsibility to ensure that their internal Authorised User has access to these resources and that accurate contact details are provided to Sage for communication to be shared and received timeously.

3.6 Our Sage Technical Support team will assist with Category 2 to assist with investigative Support Request(s) related to standard software functionality and provide Errors and Issue diagnosis. If the solution(s) are readily available, or queries received relate to user training requirements, referral to the applicable Sage Online Digital Platform will be provided, appropriate training courses recommended or a Consultation with a time and material consultant be facilitated.

3.7 The Customers designated Authorised User may log all Category 2 Support Requests with Sage (when not linked to a Sage Business Partner) and will be required to administer the application of the recommended solution within the Customers environment. Should a Sage Business Partner be required to fulfil the resolution process, a Consultant Support request or referral will be logged.

3.8 Category 3 support requirements may require the involvement of Sage's Software Development team and this will be facilitated by the Technical Support consultant.

4. Exclusions to Technical Support

4.1 As per 2.1.3, our Technical Support team will evaluate the Support Requests and will refer to a Sage Business Partner for fulfilment for the excluded services.

4.2 The following services are excluded (and not limited to) from the provision and scope of Technical Support from Sage;

 4.2.1 Assisting untrained users or new users who are not familiar with the Sage Product.

 4.2.2 How-to configure a Sage Product to achieve specific business objectives with the current configuration or how to change\enhance the current configuration.

 4.2.3 Assistance with On-site training to manage the implemented Sage Products optimally when required.

 4.2.4 Assistance with system defaults or parameter changes as and when required for a Sage module or feature.

 4.2.5 Assistance with on-screen errors/ or issues that are caused by a bespoke configuration or customization.

 4.2.6 Assistance with report reconciliations.

 4.2.7 Assistance with audit scripts, or creating and implementing custom script notifications.

 4.2.8 Assistance with access control configuration or maintenance.

 4.2.9 Assistance with database and environment maintenance or optimization.

 4.2.10 Assistance with report development and maintenance, scheduling of reports, or managing exceptions through variance reporting.

 4.2.11 Assistance with bulk input/import processes.

 4.2.12 Assistance with the Integrations of third-party applications.

 4.2.13 Assistance with configuration change requests.

 4.2.14 Assistance with customization change requests.

4.3 These excluded services can be procured via our extensive Sage Business Partner network for Consulting Services which may be procured under a separate agreement.

5. Evaluating & Prioritizing a Support Request

5.1 support Requests (related support Category 1, 2 & 3 type of queries) will be evaluated based on a priority matrix considering user Impact and business Urgency. The priority level will determine and guide the response and resolution times.

PRIORITY MATRIX	IMPACT (1) Typically affects all users (or more than 50% of a system)	IMPACT (2) Affects 20%-50% of users	IMPACT (3) Affects a single user (or less than 20% of users)	IMPACT (4) Affects less than 5% of users
URGENCY (1) Affects a business-critical system. At least one business-critical process is not operational and may lead to a financial Impact. There is no alternative workaround available.	PRIORITY (1)	PRIORITY (2)	PRIORITY (3)	PRIORITY (4)
URGENCY (2) Affects a business system. Business critical, but with short-term alternative workarounds. May lead to a financial Impact.	PRIORITY (2)	PRIORITY (3)	PRIORITY (3)	PRIORITY (4)
URGENCY (3) Not business critical. There will be no financial Impact on the business if the system is not restored within a reasonable amount of time.	PRIORITY (3)	PRIORITY (3)	PRIORITY (3)	PRIORITY (4)
URGENCY (4) No Impact on business productivity.	PRIORITY (4)	PRIORITY (4)	PRIORITY (4)	PRIORITY (4)

5.2   Progress updates shall be provided on all queries in line with the Priority and category. The nature of the support requirement may influence resolution times and complex, category 3 queries may necessitate extended investigation and resolution periods. This will be fully communicated, and workarounds proposed where possible. Sage advises that Priority 1 Support Requests be logged via the Telephone support channel (where available) in order to obtain the most timeous response and resolution.

5.3   Requests received via Telephone & Chat (where applicable) will be logged and prioritised based on the priority matrix below. In the event the Support Request is unable to be resolved on first contact the Authorised User will be provided an estimated resolution time that will be determined on a case by case basis.

5.4   Support Request logged via email will receive an automatic system notification to acknowledge receipt.

5.5   Priority 2, 3 & 4 Issues to be logged via Email for assistance.

5.6   Estimated initial response and resolution times will be influenced by the quality of information provided by the customers Authorised User as well as the ability to replicate the details of the Support Request. Quality of information relates to a summary of the Error or Issue, listing the possible steps to replicate and the nature of the expected outcome.

5.7 In the event a Support Request is difficult to replicate, the Technical Support team will manage the interaction with timeous updates agreed (e.g. hourly or daily) with the Authorised User. Resolution times could be affected should replication require access to customer's current data or Data Backups.

6. Standard Product Maintenance Support Service

6.1 Our standard product maintenance does not cover customisations or changes that alter the software's design and functionality, including alterations of data via a method other than the relevant product.

6.2 Resolution process: Handling a product defect:

6.2.1 Where a Support Request has been identified as a potential Sage Software Defect, the Sage Technical Support team will facilitate an internal resolution process. If the Software Defect is confirmed, an internal reference number will be issued. This reference number will be used to track all communications depending on the associated resolution type.

6.2.2 The feedback will be managed based on the Priority level the software defect has on the Customer's business and on a case-by-case basis.

6.2.3 In cases where the software Defect can be replicated, an interim process will be initiated to identify and determine the viability of a workaround (short term) while a longer-term solution may be provided (like an update, patch or hotfix).

6.2.4 In cases where the software Defect occurs intermittently, or immediate diagnosis is not possible, or a non-defect-related Issue adversely affects the software, the Sage Technical Support team may offer alternative solutions or workarounds to decrease the Priority of the Support Request.

6.2.5 Resolution types and timelines set out as follows. Asterisks (*) denotes will be managed on a case by case basis due and governed by our Sage product development guidelines.

Priority	Resolution types	Progress Updates	Timeline Targets for Resolution*
P1	Disaster recovery, system restore or alternative workaround, hotfix (patch file) and/or the next available maintenance release *	Daily or mutually agreed interval	Mutually agreed timeframe for a Hot Fix
P2	Workaround, hotfix (patch file) or next available maintenance release *	Mutually agreed interval	Next maintenance release
P3	Next or future maintenance release *	As required	Next or future maintenance release
P4	Future release	As required	Future release

6.3 Resolution process: Facilitating product enhancements:

6.3.1 Enhancements typically involve changing how an existing feature or function within the product (current and future versions) or adding a new feature to a product (current and later versions).

6.3.2 Customer input on feature and function set is greatly valued and is a critical component of our product development process.

6.3.3   All Enhancement Requests are tabled with our Sage development team and evaluated based on product impact and customer demand. Sage's guidelines on product development and roadmap allocation are however strictly governed.

6.3.4   Not all enhancements will be incorporated into the product roadmap. Sage does not provide commitments regarding enhancement incorporation or development timelines.

7.   Responsibilities of Sage with regards to Technical Support:

7.1   To enable and provide timeous and effective resolution of Technical Support queries, Sage shall:

7.1.1   All Technical Support Request will be logged on Sage internal system for future reference.

7.1.2   Endeavour to always positively and timeously resolve Support Requests based on the category and priority matrix

7.1.3   Communicate foreseeable or unexpected delays to manage the expectations of the Customer during the Resolution Process.

7.1.4   Notify the Customer of Sage Software updates and related information

7.1.5   Maintain and update the online content and knowledge resources regularly to ensure the most accurate and up to date guidance is provided

7.1.6   Where applicable recommend training to ensure appropriate skill levels are maintained by the Customer to ensure effective use of the Sage solution.

7.1.7   Recommend the use of a linked Sage Business Partner or utilise a 3rd Party solution provider in the event a Support Request falls outside of the scope of Technical Support.

8.   Responsibilities of a Sage Customer with regards to Technical Support:

8.1   To enable and support timeous and effective resolutions of Technical Support queries, our Customer:

8.1.1   Shall appoint an Authorised User who is responsible for administering the Sage solution and Company Configuration, and further enabling daily processing to meet business service levels

8.1.2   Shall ensure the Authorised User has undergone enough training and certification to support the business as outlined in clause 8.1.1

8.1.3   Shall ensure the Authorised User has a registered profile on Sage Online Digital Platforms to receive communication updates

8.1.4   The Authorised User shall administer all change requests to amend the software configuration, be the central point of contact that would need to administer the process as described in the associated Sage Business Partner agreements

8.1.5   Facilitate a handover to a secondary Authorised User should the primary Authorised User is unavailable. Reasonably allow Sage or Sage Business Partner Consultants to carry out their duties as outlined in this document and shall provide appropriate access to relevant hardware, software and personnel to facilitate the provision of the Technical Support

8.1.6   Ensure that all hardware and servers comply with minimum software requirements, as provided by Sage from time to time

8.1.7   Be responsible for initiating and storing regular Data Backups of the Sage software data and media in a secured location that is easily accessible

8.1.8   Be responsible for arranging secured location either on-site or off-site for storage of Data Backups;

8.1.9   Be responsible for allocating the applicable internal team or 3rd party to load Microsoft updates and/or environmental/infrastructure updates for Sage software to perform optimally;

8.1.10   Customer shall provide access to a temporary environment (commonly known as a Playpen or test environment) to Sage to login and troubleshoot without accessing or affecting the live processing environment (commonly known as the Production environment). Access to live environment under special circumstances may be requested with approval.

8.1.11   Confirm that all the operators (software users) have the appropriate environmental access (read, write and modify) to the Sage software;

8.1.12   Confirm that the Authorised User has access to arrange administrator command line access to perform certain tasks outside of the Sage software (where required); and

8.1.13   Ensure that the Authorised User completes the Sage customer satisfaction rating surveys to provide feedback on the quality of the support provided and enable Sage to continuously improve.

9. Responsibilities of a Sage Business Partner with regards to Technical Support:

9.1   To enable and support timeous and effective resolution of Technical Support queries, our Partner:

9.1.1   Shall follow the guidelines set out in the Sage Partner Program as stated under Sage Customer Support and Services for Partners.

9.1.2   Shall follow the processes set out in the Sage AME Technical Support Partner Handbook to access Technical Support services.

9.1.3   Should have access to a pre-production/test environment to investigate a Support Request from a Customer or continue an investigation with the Sage Technical Support team after the Support Request has been logged.

9.2   Shall provide their linked Sage customers:

9.2.1   With guidance to fulfil the responsibilities outlined in 8.1.

9.2.2   With documentation (for easy reference) and offer Consultant Support services on how the Sage product has been configured to deliver on the customers business objectives.

9.2.3   With documentation (for easy reference) and offer Consultant Support services on custom configuration or development work (i.e. not considered as standard functionality by Sage).

10. Sage Technical Support Level Escalation:

10.1   Escalation level set out below:

Escalation Level	Designation	When
1st Escalation	Customer Support Team Manager: Medium Support	For urgent assistance or unsatisfactory service from First Line: Operations Support
2nd Escalation	Customer Support Senior Manager: Medium Support	For non-service delivery or unsatisfactory service received
3rd Escalation	Customer Support Director: Medium Support	For non-service delivery or unsatisfactory service received

Escalation Level	Designation	When
1st Escalation	Customer Support Team Manager: Medium Support	For urgent assistance or unsatisfactory service from First Line: Operations Support
2nd Escalation	Customer Support Senior Manager: Medium Support	For non-service delivery or unsatisfactory service received
3rd Escalation	Customer Support Director: Medium Support	For non-service delivery or unsatisfactory service received