How to Register or Update Contacts on Sage Software Online

Getting Started:

To use Sage Software Online, you must be an authorized contact at a company with an active maintenance and support agreement for a Sage Software product. You will also need a user name and password in order to login. If you do not have a Sage Software Online user name and password, you will need to submit a request for one.

Types of Sage Software Online Users

- 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.
- Authorized Contact – a person authorized to view account information on Sage Software Online.

If you haven't established an Administrative Contact, you can do so by downloading the *Request to Establish Sage Software Online Administrative Contact* form and following the listed instructions. The form can be downloaded from: http://support.sagesoftwareonline.com/adminenrollmentform.pdf

Requesting New Sage Software Online Access:

1. Start your web browser.
2. In the Location or Address field of your web browser, enter the URL address: http://sagesoftwareonline.com
3. The Sage Software Online screen appears. The new user registration link (Register now) is located in the center of the screen, just below the Login button.
4. Click *Register now*. The New Member Registration screen will appear.
5. The registration information fields appear on the screen. Use the scroll bar on the right, or press 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.)
6. 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 or you can contact DWD for the account number.
   - **Company Name** – Type your company name.
   - **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 that is authorized to contact Sage.
- **Email Address** – Enter their email 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.
- **Select Password** – Choose a password of at least 8 characters and up to 20 characters. *(You will want to note that this password is case sensitive.)* 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 mistyped your password.

7. If you see a set of checkboxes at the bottom of the New User Registration page, you can use these to subscribe to Sage e-mail lists. If you do not see the checkboxes, or do not wish to sign up for an email list at this time, you can always sign up for email at a later date.
8. To send your new request for access to Sage Software Online, click the *Register* button.
9. If you have a valid/current support agreement that allows you access to Sage Software Online, your request for access is instantly processed and your browser is directed to the Sage Software Online login screen.

Logging into Sage Software Online from the Main Sage Website:

1. Launch your browser.
2. In the Location or Address field of your web browser, enter the following URL address: http://www.sagesoftware.com
3. The Sage Software website appears.
4. Click the word support. The customer support page will appear.
5. Click Customer Logon. The Customer Support Login page appears.
6. Click on the appropriate Mid-Market Accounting Solution.
7. The Sage Software Online Login appears.

Managing Your Company Contacts:

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

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

4. The Edit Personal profile screen appears. Fields which require an entry are marked with red asterisks.
5. In the First Name and Last Name fields, verify or change the names.
6. If desired, type the business title and department information into the Title and Department fields.
7. In the Office Phone fields, verify or change the telephone information.
8. If desired, type business telephone numbers into the Alternate Phone and Fax fields.
9. In the email address field, verify or change the Internet email address information. (Email Address is required if you want to make use of the Receives Case Email Checkbox)
10. In the Contact Status area, click on the *Active* button to change an Inactive contact to an Active one, or click on the Inactive button to change an Active contact to an Inactive one.
11. Choose the following Contact Types:
    - **Primary** – Each company has only one Primary contact. This contact will receive Sage information, including renewal notices for support agreements, communications for key contacts, 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 as well as information about computer based and web based training offerings.
    - **Accounting Contact** – Each company has only one Accounting Contact who has access to accounts such as an Accounting Manager, CFO, Controller or Company President.
    - **Staff Member –** Use the Staff Member contact type if no other contact type applies.
12. Choose one or more of the following Permission Types:
    - **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.
13. From the Email Subscription Lists Checkboxes, you are able to view or change the subscriptions to Sage Software email lists. Select from the left-hand column of checkboxes the products for which the contact would like to receive regular email distributions of support or marketing documents. Clear the checkboxes for which the contact no longer wishes to receive email distributions.

14. In the Assigned Agreements area, you can see the valid Client Care 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 off of an agreement).
15. To save the changes to the contact's personal information, click the *Save Profile* button at the bottom of the screen. To clear the changes you have made, click the *Cancel* button.
16. To view any Inactive Contacts, click the *Inactive Contacts* button at the bottom of the screen.
17. 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.

Submitting an Authorized Contact Request Form:

Another way to add or delete an Authorized Contact is by submitting an Authorized Contact Request Form.

1. Access the Sage Software Online Homepage located at www.sagesoftwareonline.com.
2. Click on the link *"Accounting Solutions-Authorized Contact Request Form*" (Located near the bottom of the screen)
3. Select either "*Open"* or "*Save"* in order to access the form.
4. Fill in all required company information located at the top of the form.
5. Under "*Confidential Company Disclosure*", be sure to have the Authorized Officer or Principal sign and date the form.
6. Under *Add/Delete Contacts*, you will then need to input the name of the contact being added or deleted.
7. Next, you will select any applicable Contact Type Codes.
    - **1: Primary** – Each company has only one Primary contact. This contact will receive Sage information, including renewal notices for support agreements, communications for key contacts, marketing communications and mailers.
    - **2: Training & Cert -** Each company has only one Training & Certification contact. This contact is responsible for reviewing and disseminating information related to Sage Product Training as well as information about computer based and web based training offerings.
    - **3: Sales & Mktg** – Each company can have multiple Sales/Marketing contacts. This contact will receive weekly emails, sales and marketing communications, promotions, new product announcements and Client Care and support information.
    - **4**: **Software Update** – Each company has only one Software Updates contact who maintains the company's Sage software products. This contact will receive software updates and communications.

- **6: Accounting** – Each company has only one Accounting Contact who has access to accounts such as an Accounting Manager, CFO, Controller or Company President.
- **7: Support** – Company contact that is authorized to place or receive support calls.

8. You will then select any applicable Sage Software Online Contact Type Codes.
    - **8: Online Support** – 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.
    - **9: Admin -** 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.
    - **10: General Online Data Access –** 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.
9. Enter in First and Last Name of the individual being added or deleted.
10. Add the email address of the contact – an email address is required for all Sage Software Online account access authorizations
11. Lastly, enter the product line for which the contact is authorized to receive support. (i.e. MAS 90 or MAS 200)
12. You will then need to fax the form to 949-753-0374.
13. Changes to the account will be reviewed and approved by the end of the next business day.