

# Sage Accountant & Bookkeeper Handbook



Payroll Year End Edition – March 2019

Sage UKI Customer Services

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# 01 About this Handbook





# About this Handbook

We hope and expect that your relationship with Sage will last many years. This Handbook introduces you to software support.



This handbook will explain the support and training options available to you, our support boundaries, and provide troubleshooting guidance and time saving hints and tips to enable you to resolve queries quickly and efficiently.

You will also learn how to raise a product improvement idea to shape the future of your practice software.

This handbook describes and covers support available for the following software:

- [Sage 50cloud Accounts](#)
- [Sage 50cloud Payroll](#)
- [Sage Accounts Production](#)
- [Sage Accounts Production Advanced](#)
- [Sage Taxation](#)
- [Sage Corporation Tax](#)

# 02 Payroll Year End





# Payroll Year End 2019

We've built a one-stop-shop for all things Payroll Year End within our Sage Help Centre.

<http://sage.co.uk/pye>

Here you'll find everything you need to help you process your year end as efficiently as possible. Update your software, get ready for the new tax year, register for a live webinar, or watch one of our year end videos, plus much, much more.

[Live Q&A sessions](#) will be running throughout Payroll Year End. Drop in to a session at any time and have your questions answered by a dedicated Sage expert.

We also have a webchat team of specifically trained agents ready to answer your Payroll Year End queries. Simply select "Online Chat" from the "Reach Out" section of the [Sage Help Centre](#) and choose the "chat about year end" button to speak to an agent.

Alternatively, visit [Sage City](#) for quick answers to your year end questions, advice from others with knowledge and experience, and the latest payroll news from Sage.

Whichever way you choose to contact us, we'll provide you with the support you need this Payroll Year End.





# 03 Sage Help Centre





# Sage Help Centre

## Have you visited the Sage Help Centre?

Support at your fingertips wherever and whenever you need it – 24/7



Search for answers from hundreds of support guides and short articles.



Sign up for a live webinar for the latest hints and tips from a Sage Expert.



Access the Sage Business Community for quick answers and practical advice from Sage Experts and connect with other businesses.



Want to learn more? Check out our training options.



Chat online to one of our dedicated support team.

Visit [www.sage.co.uk/accountantsupport](https://www.sage.co.uk/accountantsupport)







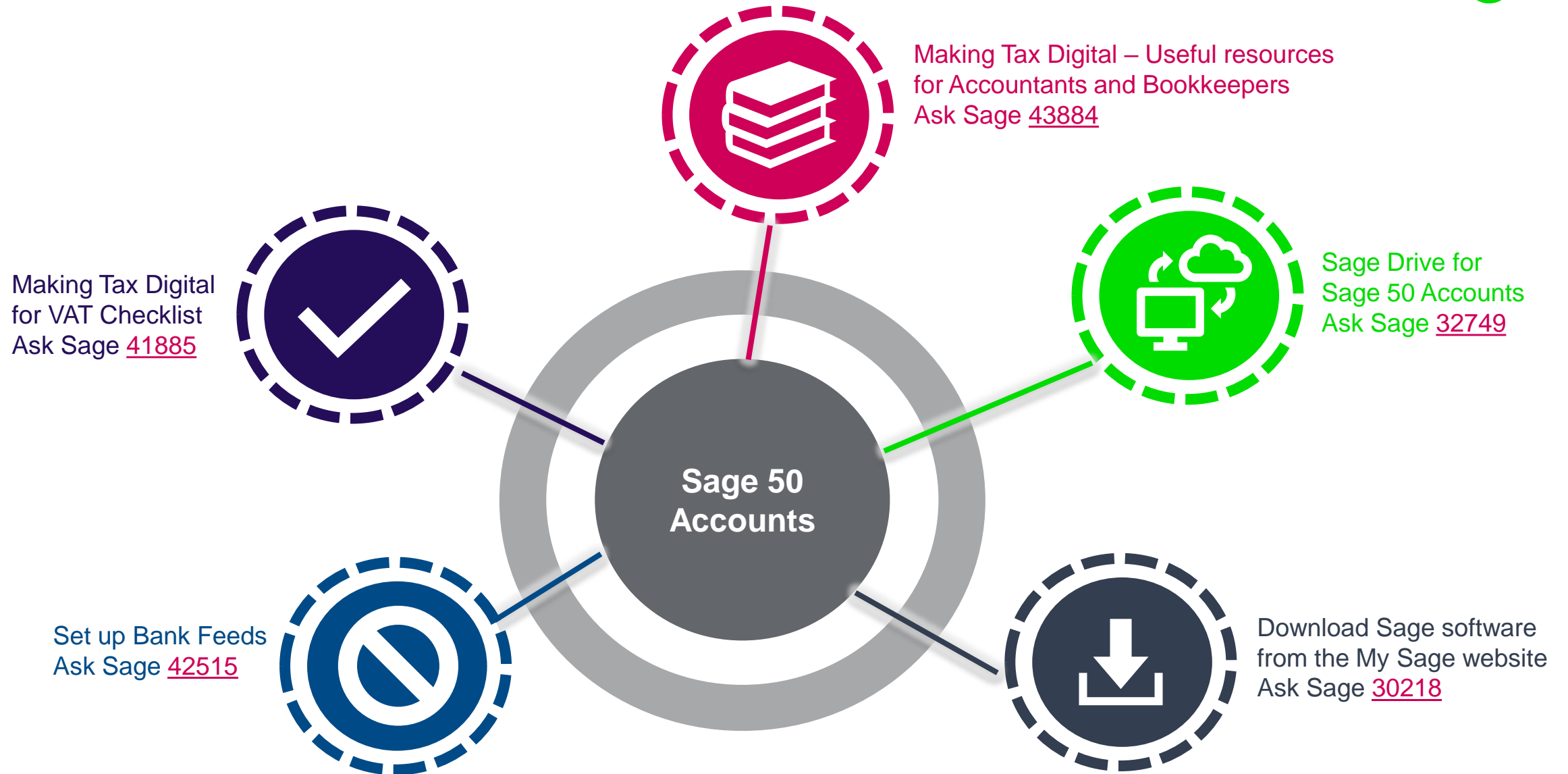
# 04 Time Saving Hints & Tips

We've put together some handy hints & tips for each of the accountants products, based on our experience of the common questions and queries that come in to Customer Services.

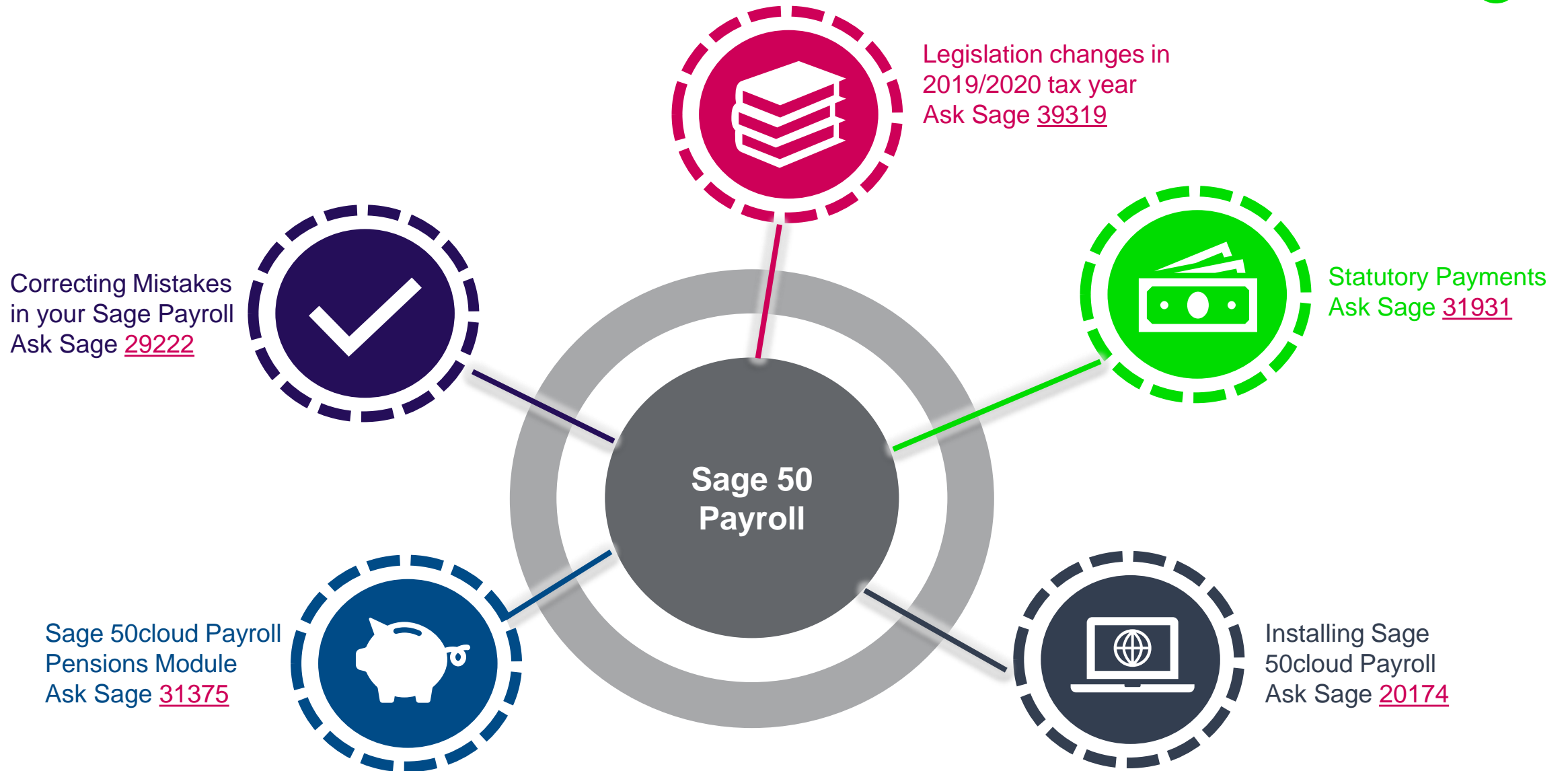
If you have a question about one of our products, take a quick look at this section and the solution could be just a click away.



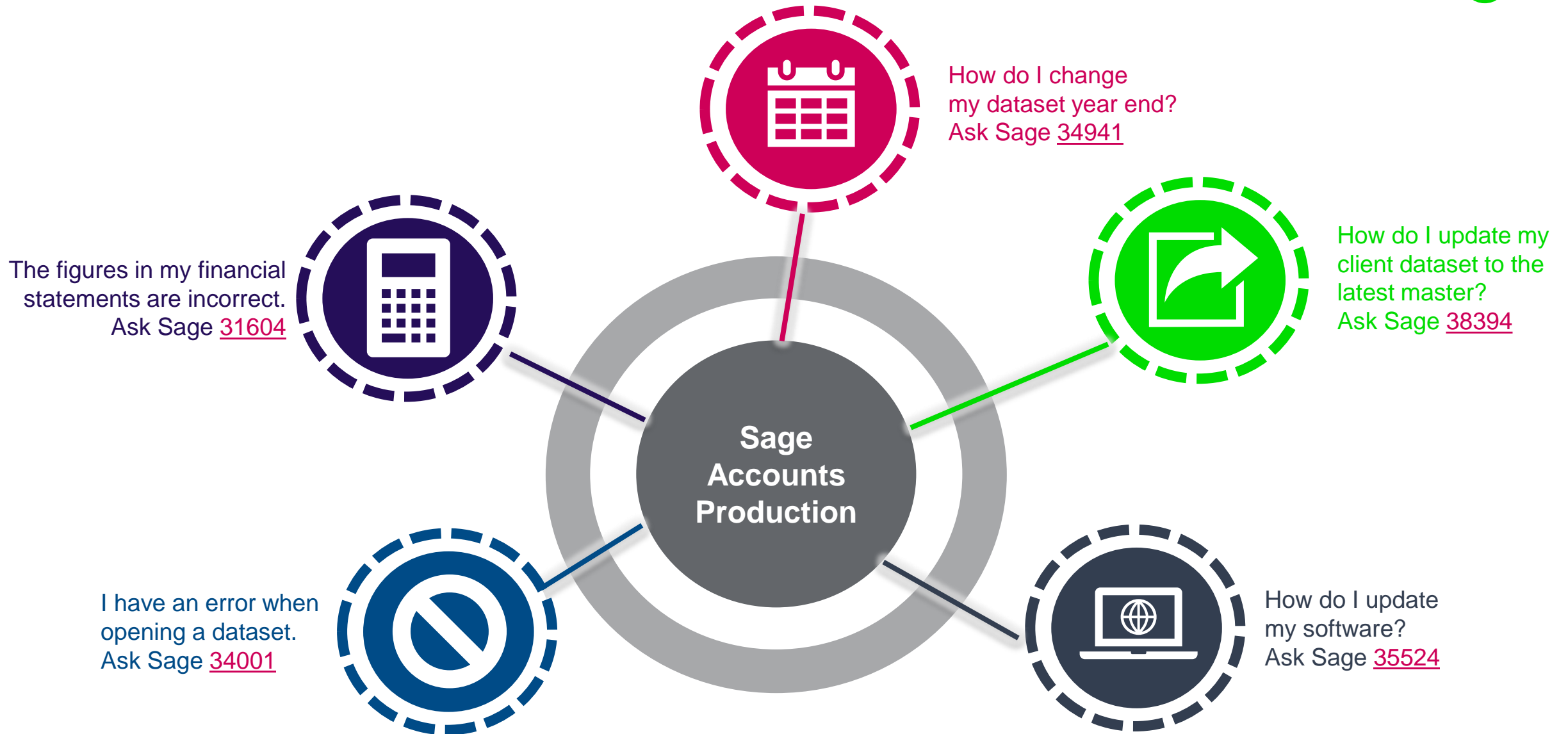
# Sage 50cloud Accounts

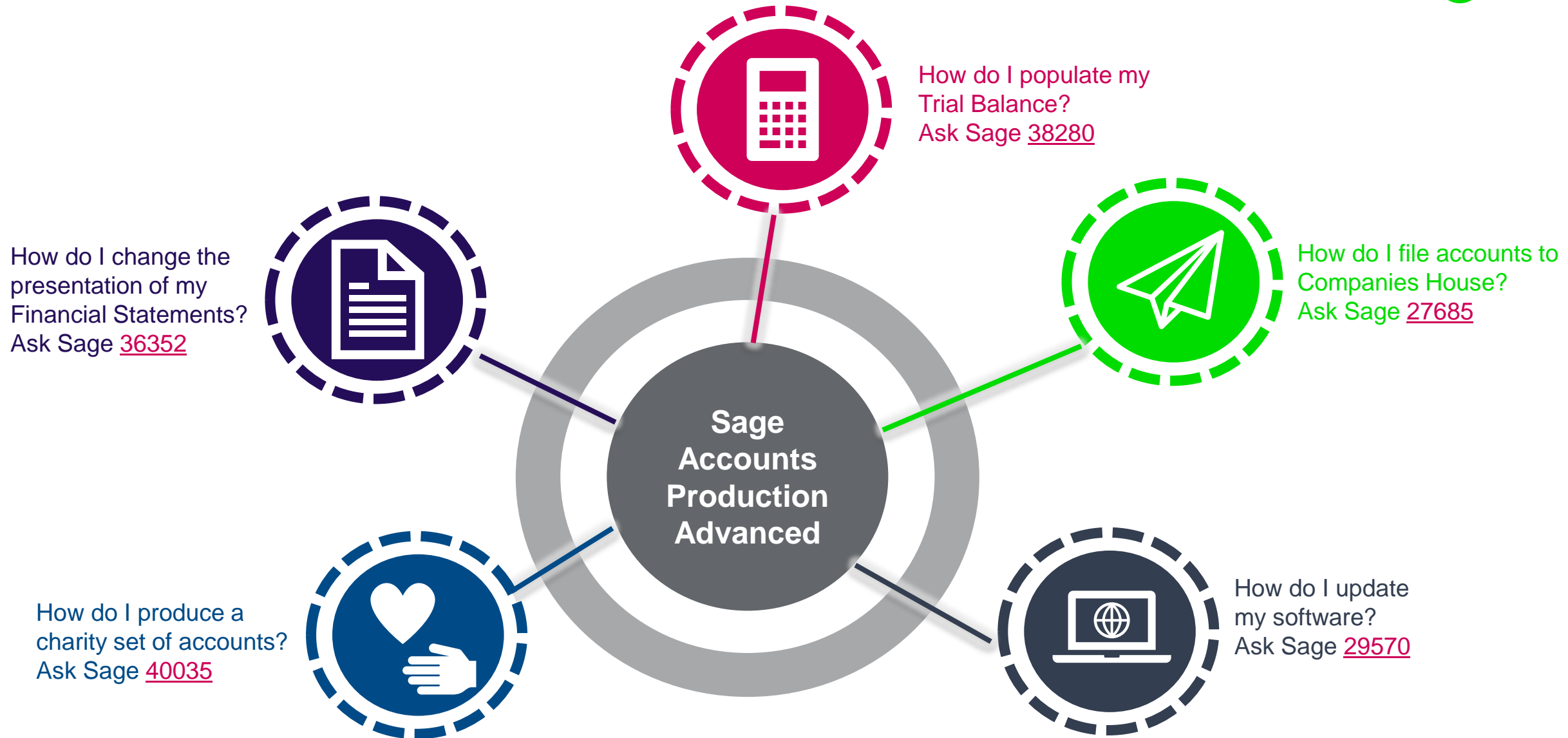




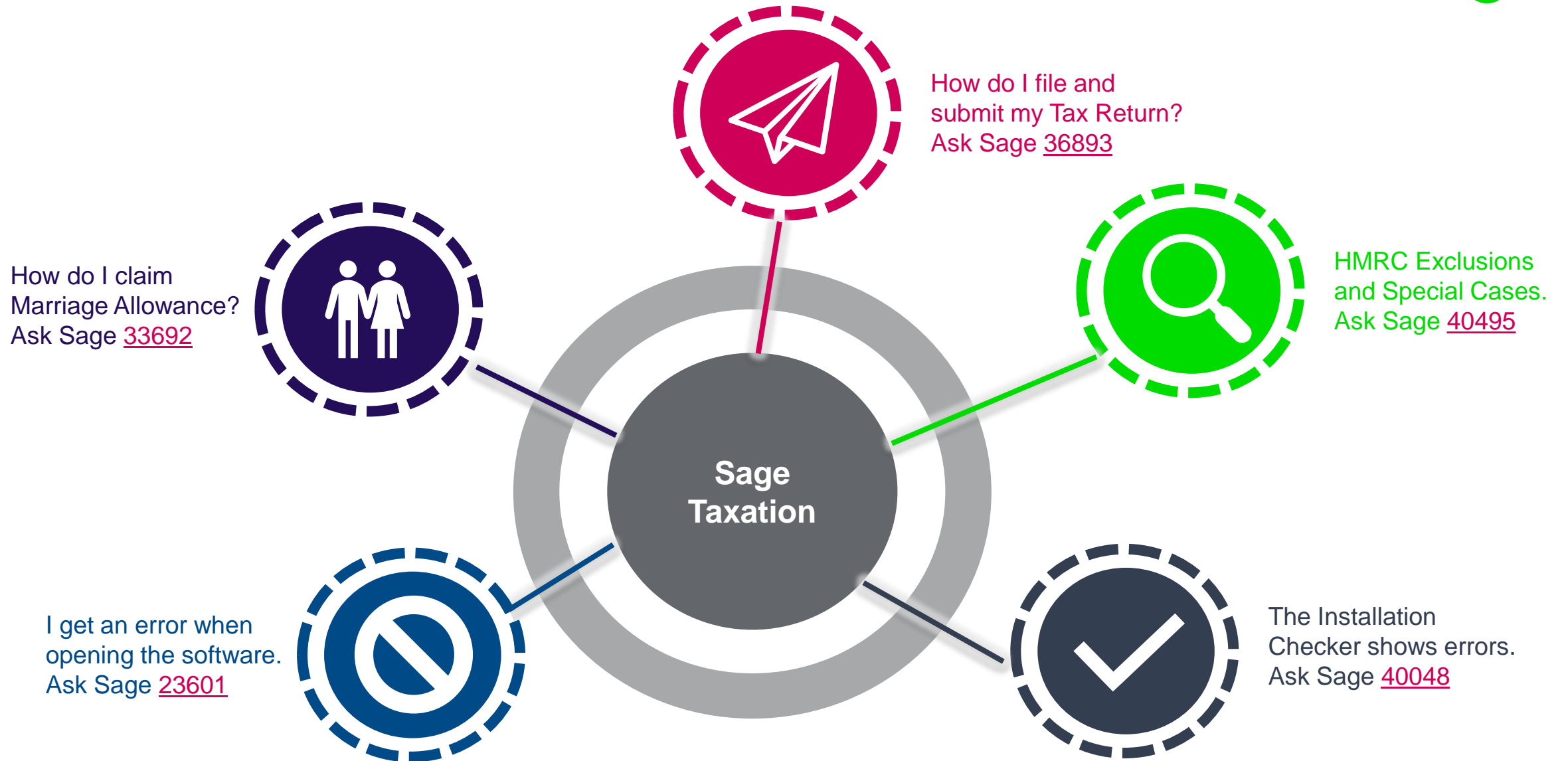


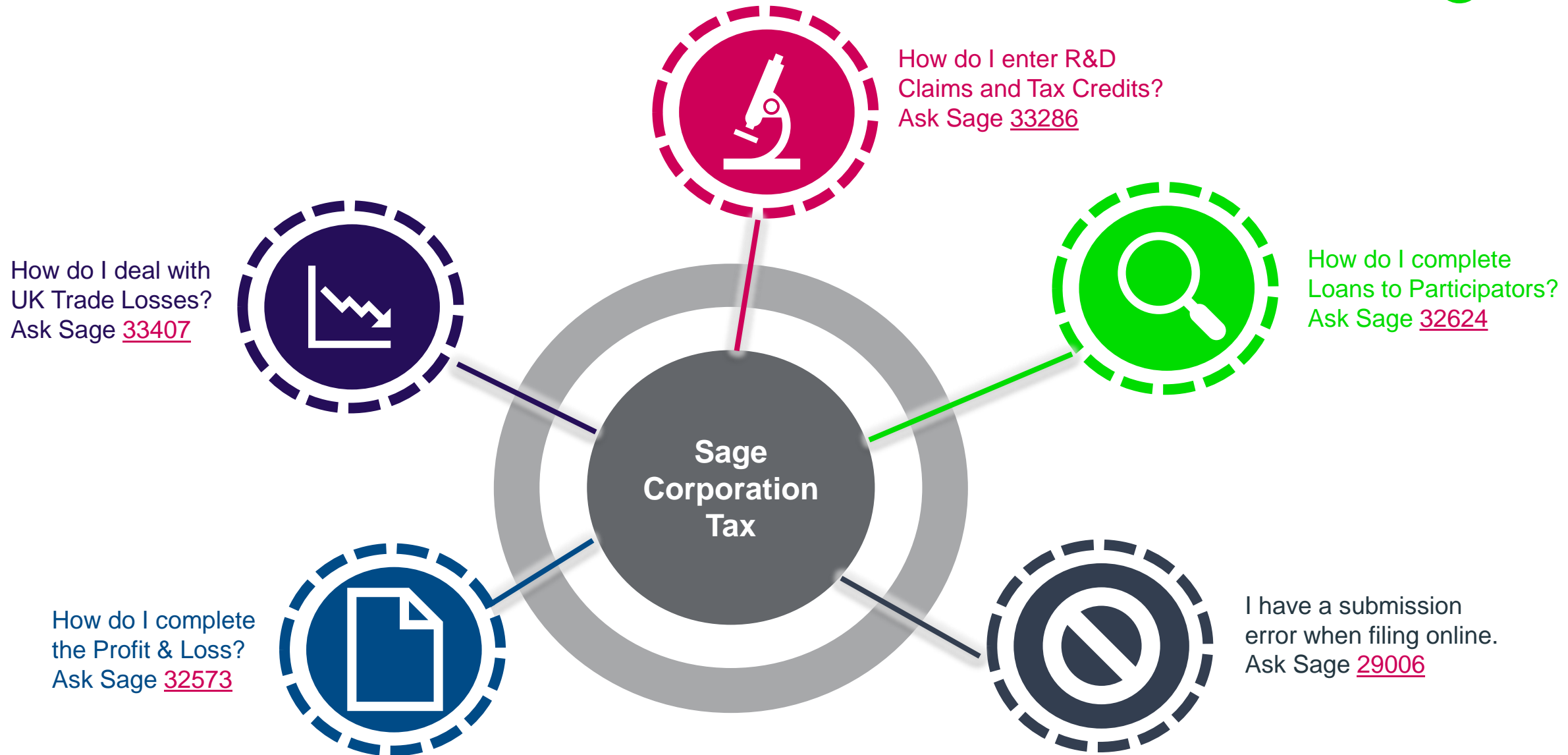














# 05 Troubleshooting Guide



# Troubleshooting Guide

We've created a simple troubleshooting guide to point you in the right direction, and in the majority of cases give you the answer to your query.

If you are unable to resolve your query and need to get in touch with customer services, we recommend you complete some basic troubleshooting before you contact us.

Establishing this information will help your support technician to diagnose and resolve the issue as quickly and effectively as possible.

- What were you trying to do when the issue occurred?
- Does the same issue occur on a different client, workstation or user?
- When was the software last working correctly, and what has changed since then?
- Is your program running the latest version, and if not, does the issue occur following the update?

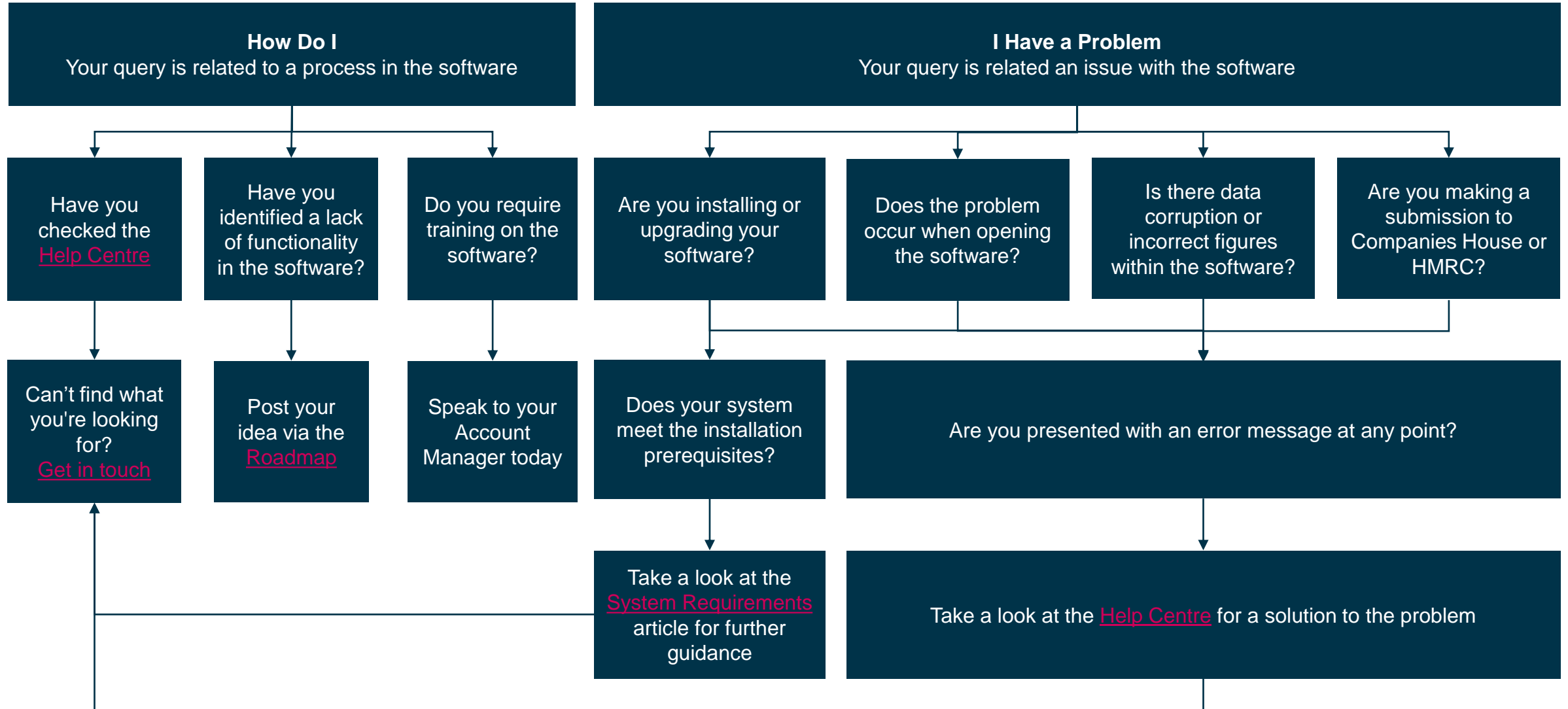
The latest versions of the software can be downloaded here –

<https://my.sage.co.uk/productdownloads>





# Troubleshooting Guide



# Software Releases

We strongly recommend that you update your software to the latest version as soon as it's released.

Our current software is released via the auto-update mechanism in the software or the [sage.co.uk](https://my.sage.co.uk) website

<https://my.sage.co.uk/productdownloads>

Please review the latest documentation that accompanies each release, including the system and installation requirements to ensure you have the necessary prerequisites in place.

**Should an issue occur with your program and our support team establish the version is the root cause, the program must be updated before we can continue to troubleshoot.**





# Support Boundaries – Your Software



What we won't do	What we will do
Choose the nominal codes to make posting to	Suggest a range of codes based on where you want the figures to appear in the financial statements.
Enter transactions on your behalf	Provide you with the steps to enter the transaction.
Advise on calculation values	Explain where the figure is coming from and how the software arrived at that figure.
Advise where to enter something on the tax return	Ask you to confirm the box number you want to populate and explain where in the software to enter the figure
Provide tax advice	Reference the legislation the software is working from
Apply ixbrl tags on your behalf or advise on which tags to use	Advise you where to find the range of tags from the taxonomy and provide you with the steps to apply the tag
Submit accounts or tax returns on your behalf	Provide you with the steps to make the submission
Customise the accounts on your behalf	Provide you with the steps to make the change in the software

# Support Boundaries – Your Environment



What we won't do	What we will do
Switch off or make changes to your antivirus, firewall, user account control, proxy settings, user permissions or ports	Request that either you or your IT professional switch off or make the changes as a troubleshooting test
Leave your antivirus, firewall or user account control switched off following troubleshooting	Advise you or your IT professional to switch them back on following completion of our troubleshooting tests
Make any changes to workstation or server registry keys	Advise you or your IT professional of the changes to the registry that we believe could resolve the issue
Download, use or recommend specific 3 <sup>rd</sup> party tools	Suggest a 3 <sup>rd</sup> party tool is used, either by yourself or your IT professional, to resolve the issue
Make changes to a full SQL instance	Advise you on the steps and recommend the process is completed by your IT professional
Change or uninstall SQL (outside instance)	Recommend the process is completed by your IT professional
Data recovery following environmental issues	Request that either you or your IT professional locates and restores a backup of your data



# 06 Training & Consultancy



# Training & Consultancy

We offer training, consultancy & setup on all Sage products, including the Practice Solutions software.

We take the very best technicians and mould them into great consultants to allow us to deliver a service currently running with a Customer Satisfaction of 97%.

We can either deliver onsite or remote sessions, depending on your needs and complexity.

The consultant will contact you directly to understand your requirements and provide a tailored solution for you, which can include:

- Onsite Visit (one or more full days)
- Half Day Remote Session
- Bespoke Remote 1-2-1 Session

For more information please visit <https://my.sage.co.uk/public/help.aspx#/accountant/training> or speak to your account manager today.







# 07 Your Voice





# Product Roadmap

Your opportunity to shape the future of your practice products

If you believe the functionality of the product can be enhanced or if you have a request for a new feature, you can submit your idea via the [Product Roadmap](#)

Prior to submitting an idea, it is important to explore all alternatives; Customer Services may be able to advise on different ways to use the system.

You should also use the Search functionality within the [Product Roadmap](#) prior to submitting your idea, to ensure your idea hasn't already been logged. In this case you should add your vote to the idea instead.

All ideas are considered for inclusion in future releases based upon customer demand, along with timescales required to develop, implement and test the new feature.

Any rejected ideas or ideas with only one vote against them and are over a year old will be closed.

# Satisfaction Surveys

Customer Services are committed to providing industry leading support. Our company ethos is to deliver a valued service to our customers which we can only achieve with the help of your feedback.

Surveys are periodically sent from our incident tracking system upon closure of an incident. Survey results are shared with technicians and the Customer Services leadership team to help identify areas of improvement on which we can continue and enhance excellence in service to you.

Critical to success is receiving data rich feedback on areas we need to improve. We would very much like to hear from you if the Customer Services team has not met your expectations.

If it is not clear from the response survey why a detractor score has been applied, we will contact the recipient of the survey wherever possible to gain clarity. Therefore, we would encourage completion of the free text when appropriate. We appreciate all feedback be it positive or developmental.



## Sage City

[Sage City](#) is our fantastic new community where you can interact, share ideas, ask questions and impart knowledge and experience.

You can also view breaking news and updates from us, submit ideas for product improvements, get notifications from the forums you follow and much, much more.

## Ad Hoc Feedback

If you have additional feedback that you would like to share with us, that doesn't relate to the support you've received, please feel free to email [accountants.support@sage.com](mailto:accountants.support@sage.com)



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## Useful Links & Contact Details



## Useful Links

Payroll Year End Centre:

<https://my.sage.co.uk/public/help.aspx#/customer/support/payroll/category/payroll-year-end>

Sage Help Centre:

<https://my.sage.co.uk/public/help.aspx#/accountant/support>

Ask Sage:

<https://ask.sage.co.uk>

Sage Accountant & Bookkeeper Hub:

<https://my.sage.co.uk/public/help.aspx#/accountant/support/acc-hub/category/acc-hub>

Software Downloads:

<https://my.sage.co.uk/productdownloads>

Product Roadmap:

<https://my.sage.co.uk/public/help.aspx#/roadmap/>

Contact Us:

<https://my.sage.co.uk/public/help.aspx#/contact>





# Support Availability

Customer Services are available Monday to Friday, 9am to 6pm.

The support lines are not available on UK public holidays or weekends.



## Availability

Our opening hours are 9am-6pm and we have an expert team of technicians available to support you with your query. Please be aware that between 12-2pm there is reduced coverage on our lines and you may have to wait longer to speak with a software technician. If our online support can help with your query during this time then please visit our [Sage Help Centre](#).

Please also note we may not be able to remote on to PCs to carry out extensive troubleshooting during this time, and this will be at the discretion of the software technician.

## Contact Details

Telephone Number:

Sage Practice Suite: 0845 111 11 11  
Sage 50 Accounts & Payroll: 0845 111 55 55

Email Address

Sage Practice Suite: [accountants.support@sage.com](mailto:accountants.support@sage.com)  
Sage 50 Accounts & Payroll: [support@sage.com](mailto:support@sage.com)

# Contact Checklist

## Information required when contacting Support

When you contact Support, you will be asked for the following information:

- Your account number
- Your company name
- Your name
- The software you are using
- Any password on the account

We recommend you perform your own troubleshooting prior to contacting us, to establish if the issue is data, software or environment specific.

It is essential that you let us know of any troubleshooting you have carried out prior to contacting us. Please refer to the [Troubleshooting Guide](#) for further information.

