

<u>Webform Process – logging a query via Sage Portals</u>

<u>Step 1</u>

Select your Sage package (Accounting or Payroll)

(https://portal.sage.co.za/)

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Select Portal -	-	~	
	Continue		
Privacy Policy	Terms and Conditions	Contact us	

<u>Step 2</u>

Enter your existing Sage ID/Customer number/Site Code to Login to the Sage Portal.



<u>Step 3</u>

Select your product or current Sage package.

Select Product				
Select the product that you want to v again by clicking on the switch accord	iew on the Sage Portal. You Int button on the homepage	can switch between accounts withou e.	t signing out and back in	
You are logged on as,				
Select the product that you want to view				
Sage 200 Evolution				
Sage 50cloud Pastel Partner				
Sage 50cloud Pastel Xpress				
		[End User - Accounting S Africa] - Sag	e 50cloud Pastel Partner	Sign Out
My Account * Digital Resource * Legal * Rep	orts And Statistics 👻 Training 👻	Support 💙 Quick Links 🔻		Switch Contract
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ome to Sage Customer Portal.				
gged on as from menuber is	(End User -	Accounting S Africa).		
ess your invoices, statements, view your next renewal date and r	igister your product. Resolve queries w	ith support, finance and renewal teams using Sage	Live chat. Find out about the latest produ	ct training, view online

<u>Step 4</u>

On the top bar, please select the 'Support' option.

<u>Step 5</u>

Select the 'Log a Query (New)' option.

Home My Account • Digital Resource • Legal • Reports And Statistics • Training •	Support Quick Links
	Data Management 🔸
Welcome to Sage Customer Portal.	Log a Query (New)
You are logged on as the second second from Internal Registrations Test Account - Do Not Use (End User - A Your customer number is 1910 and 1910	Log a Query
	View All My Queries
Easily access your invoices, statements, view your next renewal date and register your product. Resolve queries w chat. Find out about the latest product training, view online resources via Sage Knowledgebase and pose questio	un support, runance and renewal teams ns to the Community Hub.

<u>Step 6</u>

On the next screen identify your user profile (Customer, Business Partner, or Advisor).

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l a sañe vedresr	
Thank you for contacting Sage. Our aim is to effectively assist in resolving your query by ensuring an overall great experience.	
Please complete all required sections on the form accurately as we will send you updates on the progress of your query. We will respond to your query as soon as possible. Additionally you will receive an email with your unique reference number to track the overall progress.	
Your feedback is important to us. You may receive a survey to rate your experience and would appreciate it if you could complete it to help improve our services to you.	
r Profile	
ct a user profile that best describes you*	
information will guide us in tailoring the level of interaction	
tred for us to assist you to resolving your query.	
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ipany Name*	
ternal Registrations Test Account - Do Not Use	
vr your Contact Name*	
# your Contact Email Address*	
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er the name of your linked Business Partner*	
ify N/A if unsure	
ductInformation	
ict a Product*	
select Product-	
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<u>Step 7</u>

Fill in your Contact Name, Contact Email Address and Contact Number as shown in the previous screenshot.

<u>Step 8</u>

Specify your Linked Business Partner (if you have one). Then select your current product that you are logging the query for.

Enter the name of your linked Business Partner* Specify N/A if unsure]
Product Information	
Select a Product*	
Select Product	

<u>Step 9</u>

Based on your selected product, you will be prompted to fill in questions regarding your query.

(You may upload a screenshot or file of the error/problem should you have one on hand).

Once all the necessary fields are populated then you may click on the submit button.

<u>Step 10</u>

portal.sage.co.za says

Your query has been submitted to the Support Team. You will receive an email shortly with your reference number : HD16151481.



You will also receive an immediate auto-response via email, which will identify your query's reference number.

You may use reference number to follow up on the progress of your logged query, or track your status under **View All My Queries** once incident has been logged.

You will receive a response from our experienced consultants.