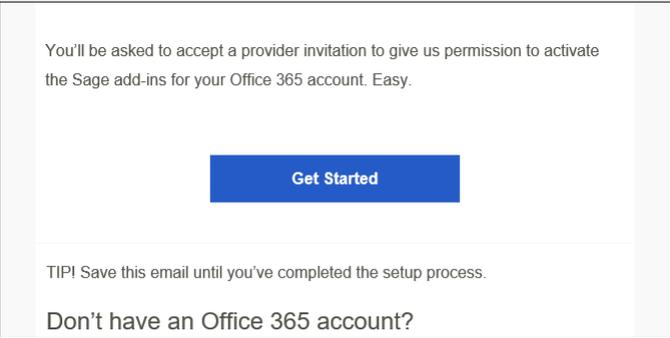
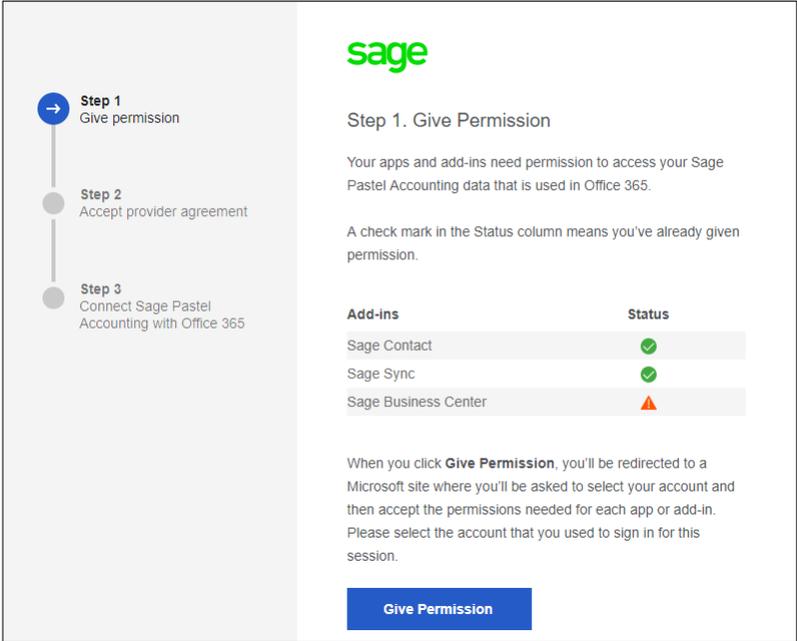
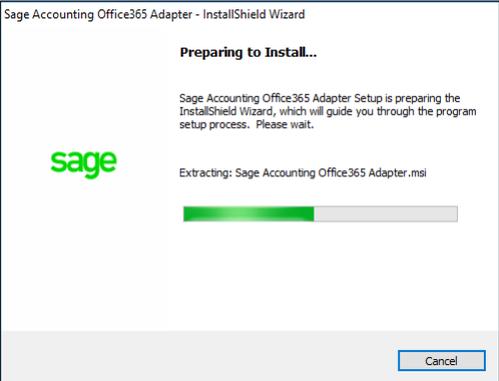
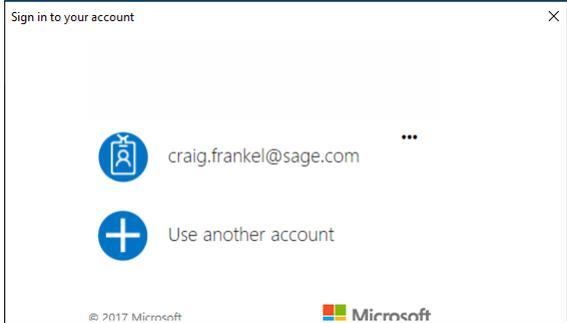
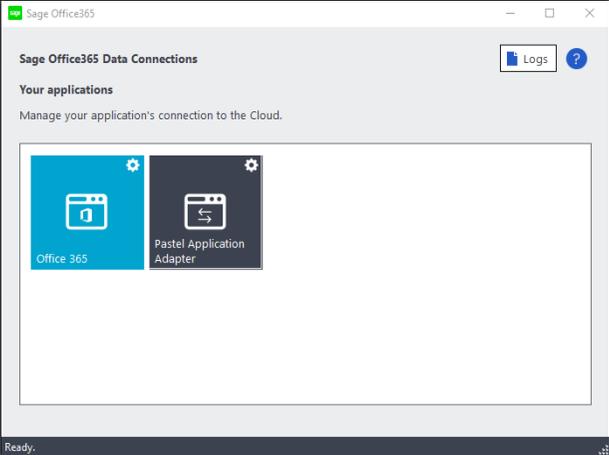
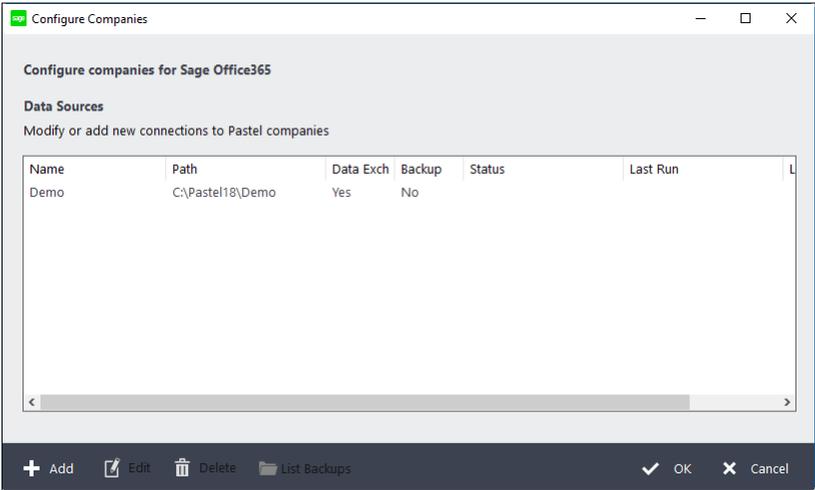
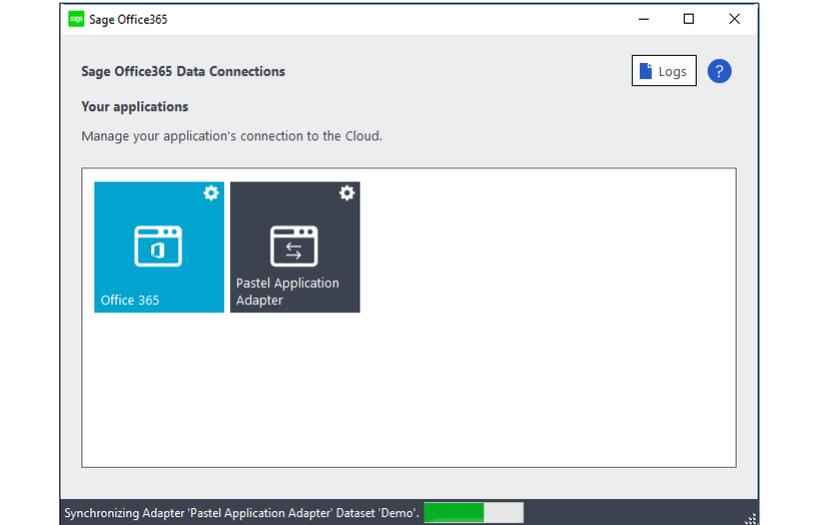


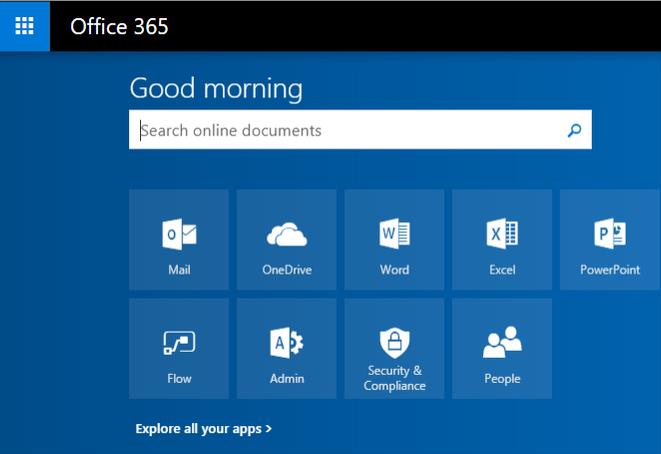
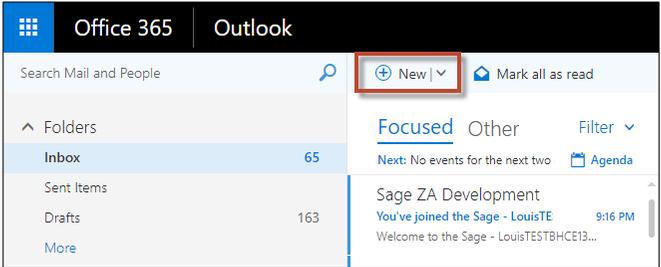
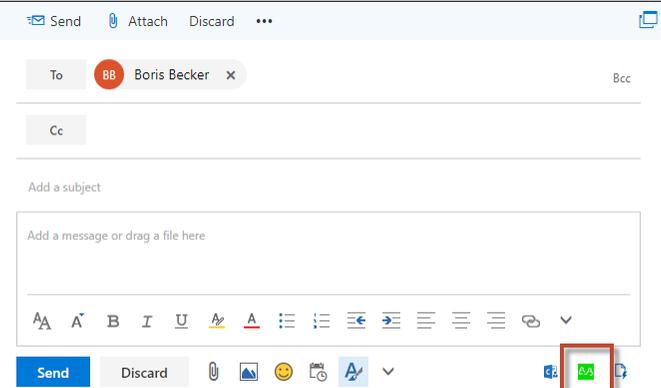
Office 365 Sage Contact process

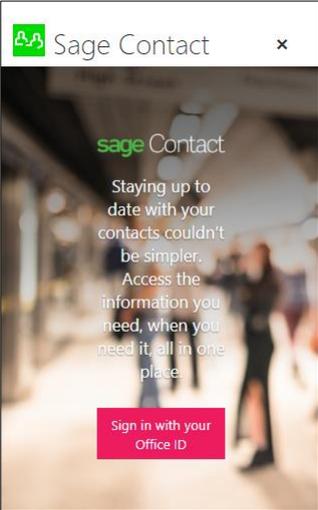
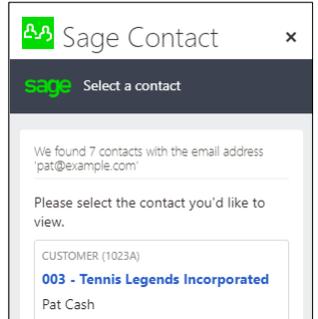
Step	Client Process	Sage Consultant Process	Backend Process	Screen
1	Client must already have an Office 365 Business Premium subscription.			
2	Client contacts Sage sales to request Sage Contact.	Sales consultant will invoice Sage Contact and register the serial number on Netadmin.	Netadmin sends onboard request to Cloud Enablement.	
3			Cloud Enablement completes request and sends a welcome email to the client.	
4	Client receives the email and clicks on the Get Started button.			 <p>You'll be asked to accept a provider invitation to give us permission to activate the Sage add-ins for your Office 365 account. Easy.</p> <p>Get Started</p> <p>TIP! Save this email until you've completed the setup process.</p> <p>Don't have an Office 365 account?</p>

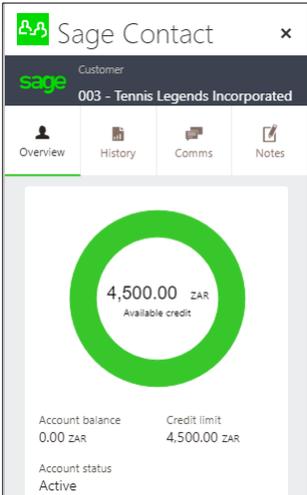
Step	Client Process	Sage Consultant Process	Backend Process	Screen								
5	Client is directed to the Sage Business Center where the client clicks on the Give Permission button to grant permission to integrate to Sage Pastel and Office 365.			 <p>Step 1 Give permission</p> <p>Step 2 Accept provider agreement</p> <p>Step 3 Connect Sage Pastel Accounting with Office 365</p> <p>sage</p> <p>Step 1. Give Permission</p> <p>Your apps and add-ins need permission to access your Sage Pastel Accounting data that is used in Office 365.</p> <p>A check mark in the Status column means you've already given permission.</p> <table border="1"> <thead> <tr> <th>Add-ins</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Sage Contact</td> <td>✓</td> </tr> <tr> <td>Sage Sync</td> <td>✓</td> </tr> <tr> <td>Sage Business Center</td> <td>⚠</td> </tr> </tbody> </table> <p>When you click Give Permission, you'll be redirected to a Microsoft site where you'll be asked to select your account and then accept the permissions needed for each app or add-in. Please select the account that you used to sign in for this session.</p> <p>Give Permission</p>	Add-ins	Status	Sage Contact	✓	Sage Sync	✓	Sage Business Center	⚠
Add-ins	Status											
Sage Contact	✓											
Sage Sync	✓											
Sage Business Center	⚠											
6	Client downloads the Sage Office 365 Adapter file and runs the installation.			 <p>Sage Accounting Office365 Adapter - InstallShield Wizard</p> <p>Preparing to Install...</p> <p>Sage Accounting Office365 Adapter Setup is preparing the InstallShield Wizard, which will guide you through the program setup process. Please wait.</p> <p>sage</p> <p>Extracting: Sage Accounting Office365 Adapter.msi</p> <p>Cancel</p>								

Step	Client Process	Sage Consultant Process	Backend Process	Screen
7	Once the Sage Office 355 Adapter is installed, client clicks on the shortcut on the desktop.			
8	Client clicks on the Office 365 button and logs into Office 365 with their Office 365 login credentials.			
9	Client is returned to the Sage Office 365 Adapter and clicks on the Pastel Application Adapter button.			

Step	Client Process	Sage Consultant Process	Backend Process	Screen												
10	Client adds the Pastel V18 datafile path and saves the path.			 <p>Configure Companies</p> <p>Configure companies for Sage Office365</p> <p>Data Sources Modify or add new connections to Pastel companies</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Path</th> <th>Data Exch</th> <th>Backup</th> <th>Status</th> <th>Last Run</th> </tr> </thead> <tbody> <tr> <td>Demo</td> <td>C:\Pastel18\Demo</td> <td>Yes</td> <td>No</td> <td></td> <td></td> </tr> </tbody> </table> <p>+ Add Edit Delete List Backups OK Cancel</p>	Name	Path	Data Exch	Backup	Status	Last Run	Demo	C:\Pastel18\Demo	Yes	No		
Name	Path	Data Exch	Backup	Status	Last Run											
Demo	C:\Pastel18\Demo	Yes	No													
11	Sage Pastel and Office 365 sync.			 <p>Sage Office365</p> <p>Sage Office365 Data Connections</p> <p>Logs ?</p> <p>Your applications Manage your application's connection to the Cloud.</p> <div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid #ccc; padding: 5px; background-color: #0070c0; color: white; text-align: center;">  Office 365 </div> <div style="border: 1px solid #ccc; padding: 5px; background-color: #333; color: white; text-align: center;">  Pastel Application Adapter </div> </div> <p>Synchronizing Adapter 'Pastel Application Adapter' Dataset 'Demo' </p>												
12	Client opens Office 365 and logs in.															

Step	Client Process	Sage Consultant Process	Backend Process	Screen
13	Client clicks on the Mail app.			
14	Client clicks on the New button and enters the customer or supplier email address.			
15	Client clicks on the Sage Connector button at the bottom right corner of the screen.			

Step	Client Process	Sage Consultant Process	Backend Process	Screen
16	Sage Contact opens. Click on the Sign in with your Office ID button.			
17	The customer or supplier will display. Click on the customer or supplier link.			

Steps	Client Process	Sage Consultant Process	Backend Process	Screen								
18	The customer or supplier account details will display.			 <p>The screenshot shows the Sage Contact interface for a customer account. At the top, it identifies the customer as '003 - Tennis Legends Incorporated'. A navigation bar includes 'Overview', 'History', 'Comms', and 'Notes'. The main content area features a large green donut chart representing the available credit, with the value '4,500.00 ZAR' displayed inside. Below the chart, a summary table provides further account details:</p> <table border="1"> <tr> <td>Account balance</td> <td>Credit limit</td> </tr> <tr> <td>0.00 ZAR</td> <td>4,500.00 ZAR</td> </tr> <tr> <td>Account status</td> <td></td> </tr> <tr> <td>Active</td> <td></td> </tr> </table>	Account balance	Credit limit	0.00 ZAR	4,500.00 ZAR	Account status		Active	
Account balance	Credit limit											
0.00 ZAR	4,500.00 ZAR											
Account status												
Active												