

Sage 50 Accounts

- **Upgrading to the Latest Version**
- **Activating Remote Data access**

General Overview

- Purchasing form for Sage 50 Accounts under Sage 50 section at www.fssu.ie
- The monthly Sage direct debit agreed for the FSSU members is €27.50
- DEIS schools receive the software FOC.
- If the billing is incorrect please email sage at fssuqueries@sage.com with the School name, Roll number, Sage account number along with the details of the billing query.

1. Steps in upgrading and activating remote data access

1. Under Help > About - check the version number.
2. Upgrade to latest Version of Sage – see steps in section 2 below.
3. Activate remote data access to be ready to access Sage data from the cloud (section 3 below).
4. Know how to set Sage up on new PC (section 4 below).

2. Upgrade to the latest version

Before you install

Back up and check your data

1. Click **File**, then click **Back up**.
2. Enter a file name then click **Browse** and select the location and click **OK**.
3. Click **Select all file types to include in backup**, then click **OK**.
4. To check your data, click **Yes** and click **OK**.
5. Click **Close**, click **Close** again, then click **OK**.

Download and install the update where your data is held

Instructions for download are here [Upgrade to Sage 50 Accounts](#)

Some key pointers:

1. Install Sage 50 Accounts where your data is stored initially.
2. Once done, you can then upgrade Sage 50 Accounts on connected computers if you have multiple installations.
3. Close all Sage software before running the upgrade
4. **If the PC is running Windows 11**, is only supported on 64-bit systems so therefore select [Download Sage 50 Accounts 64-bit](#)
5. This normally downloads automatically to your Downloads folder, if not select your Downloads folder, then click **Save**.
6. To begin the installation, locate and double-click the version listed.
To view your Downloads folder, press **Ctrl + J** on your keyboard when you have your web browser open.
7. Click Install update.
8. If you are prompted to allow the application to make changes to your device, click Yes or Allow.
9. Once the installation is complete, click Launch Sage 50 Accounts, and open your company to upgrade the data.
10. Under Help > About - check the version number is now the latest version.

Activate Remote Data Access

3. Activate remote data access to be ready to access Sage data from the cloud Instructions

- Click on Settings > User management > Users.
- Select manager > Click Edit.
- Click Allow Remote Data Access
- Follow the on-screen instructions and create a 15-digit passphrase when asked.
- The System will confirm that the data is now on the cloud.
- Other users including the school accountant can now be granted remote data access subject to the user licences and using the appropriate versions of Sage.

Grant remote data access to additional users

With a one user licence – this gives 1 main user (Manager), 1 connected user and 1 Accountant user. The 1 connected user cannot access Sage at the same time as the main user. Therefore, if two users are required at any one time, please contact Sage to avail of the FSSU agreed price of €5 plus VAT for each additional user.

Instructions

- Click on Settings > User management > Users.
- Add a user (for example for Principal) or Accountant.
- Select User type and assign appropriate level of access.
- If appropriate allow remote data access and complete the onscreen instructions
- Click Finish
- The user will now be sent an email informing them that they have been granted access. They will need to have the relevant Sage information including the passphrase. They will also have to activate a Sage Account with their email address and link it to the school Sage account.
- The Accountant will be required to have Sage 50cloud Client Manager, use the same version as the school and know their username, password, and passphrase to establish a successful link to the schools' data on the cloud.

4. Setting up Sage 50cloud and using remote data access on a remote PC or laptop

- Download V30 of Sage 50 Accounts to the new laptop
- Have a sage account setup at www.my.sage.co.uk
- Run V30, at Company setup stage, select Remote Data Access and follow the on-screen instructions.
- The passphrase will be required to gain access.
- Login to the school accounts using username and password relevant to the user.
- Always backup as normal as Remote Data access is a data sharing system on the cloud and is not a backup facility.
- Take note and follow up on any warnings that the PC is not connected to the drive as any changes made while offline will mean that the processing will not update on the cloud.
- Be vigilant and monitor the accounts while downloading the bank feeds and keeping the Bank Reconciliation up to date throughout the month will ensure completeness of the bank account.