Bishop Fleming

How to setup and upload data using Sage Drive

With Sage Drive you can upload a copy of your accounts data to a secure location in the cloud. You and your colleagues/ Accountant can then easily access the cloud data from any location. Your computer, and any other devices that access your data, synchronise with the cloud copy, so everyone sees the live data.

If Sage Accounts is installed on more than one computer on your local network, you only need to upload your data once.

System requirements

To use Sage Drive you must have:

- Sage 50 Accounts version 23.2 or above
- A broadband internet connection with:
  - A download speed of at least 4Mbps, and
  - An upload speed of at least 2Mbps.

You can check the speed of your Internet connection at various sites online, such as www.speedtest.net

How to setup Sage Drive

1. Install any available updates for your Sage 50 Accounts.
2. Open Sage Accounts, log in using the Manager logon name, and related password if you have one.
3. Click 'File' then click "Sage Drive setup" and click "Let's get started" then follow the relevant section below.

I already have a Sage ID

- Enter your Sage ID email address and password then click 'Sign In' then click "Allow".
- Enter an encryption password, then confirm your encryption password.
- To agree to the terms and conditions, select the check box then click Upload data.
- To invite others to access your data, click "Management Centre", or to return to the Sage Accounts desktop, click "Close".

I don't have a Sage ID

- If you don't have a Sage ID login, click "New User? Create a Sage ID", enter your email address, name and a password then click "Create".
- When you receive an activation email, click the "Sage ID Activation" link, then click "Register for Sage Drive with your Sage ID".
- Enter your Sage ID email address and password, then click "Sign In" and click "Register Sage Drive with your Sage ID".
- Enter your account number and serial number, click "Register", then when the Successful Registration message appears, close your Internet browser.
- In Sage 50 Accounts, click "Let's get started" and enter your Sage ID email address and password then click "Sign In" then click "Allow".
- Enter an encryption password, then confirm your encryption password.
- To agree to the terms and conditions, select the check box then click "Upload data".
- To invite others to access your data, click "Management Centre", or to return to the Sage Accounts desktop, click "Close".

Now you've uploaded your data, you're ready to connect to it from other locations.

IMPORTANT: Please remember the encryption password, as you can't reset it. If forgotten, you have to remove and re-upload your data to Sage Drive. Also, if you invite others to access your shared data, you must tell them the encryption password so they can connect.

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Once your Sage Accounts data is uploaded to the cloud from the main computer, you can use Sage Drive to connect to it from a remote computer using the Internet.

Providing access for Bishop Fleming

1. Log in to Sage Accounts using the Manager logon name, and related password if you've set one up.
2. On the menu bar, click **File** then click **Manage Sage Drive**.
3. Enter your Sage ID email address and password then click **Sign In**.
4. Click Add User then enter "Bishop Fleming" as the new user's name and drive@bishopfleming.co.uk as the email address.
5. From the Access level drop-down, choose "Accountant".
6. To save the settings, click Save.

Please advise Bishop Fleming of the EXACT version of Sage that you are using along with the encryption password for your data. This is the password you used when you originally uploaded the data.

- Your Sage 50 Accounts version number - to find this, click "Help" then "About" and check the version number.

Once uploaded, please contact us to obtain details of the user name and password that we wish to use to access Sage.

Connecting remotely if you have a single company licence

If you already have a local set of company data, this process replaces it with the shared data. Before you start, we recommend you back up your local company data.

1. Open Sage Accounts, then if an Active Setup wizard appears, proceed to step 4.
2. In the Select company window, click your local company.

If the Select Company window doesn't appear, log in to your data then click "Tools", click "Options" then click "Start up". Select the "Show the Company List on start-up check box", click "OK" then restart Sage Accounts.

3. Click Replace Company then click OK.

If the Active Setup wizard doesn't appear at this point, or Replace Company isn't available, please contact us.

4. In the Active Setup wizard, select "Connect to data from Sage Drive" then click "Next".
5. Enter your Sage ID email address and password, then click "Sign In".
6. If prompted, enter the Captcha text then click "Continue".
7. Select the company data you want to connect to, then click "Next".
8. Enter the encryption password for the shared data, click "Connect" then log in to the company.

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Connecting remotely if you have a Multi-company licence

1. Open Sage 50 Accounts, then in the Select Company window click "Add Company".
2. In the Active Setup wizard, select "Connect to data from Sage Drive" then click "Next".
3. Enter your Sage ID email address and password, then click "Sign In".
4. If prompted, enter the Captcha text then click "Continue".
5. Select the company data you want to connect to, then click "Next".
6. Enter the encryption password for the shared data, click "Connect" then log in to the company.

The first time you connect, a copy of the data downloads. This can take a few minutes depending on the speed of your Internet connection and the size of the data. Each time you log in after this, only changes to your accounts data download, which should just take a few seconds.

Using Sage Drive at a remote site

There are certain procedures that we recommend should only be completed at the main site.

- Large processes - we recommend that any large processes, for example year end, clear audit trail, maintenance tools etc. are carried out at the main site.
- Attachments - when adding attachments to customer and supplier records, you must add these at the main site as these do not sync when added from a remote site.
- Direct Bank Feeds - you can only use direct bank feeds at the main site.
- GoCardless - you can only use GoCardless/Direct Debit manager at the main site.
- Office 365 integration setup - you can only set up Office 365 integration at the main site. However, once setup, you can use all 365 features at the remote site except for document storage.

Sage Drive is not a data backup service and you should still take regular backups of your data.