

Sage 50Cloud Accounts V27

Access a company remotely using Remote Data Access

Summary

With Sage 50cloud Accounts Remote Data Access (formerly called Sage Drive) you're not tied to the office when you want to work on your accounts. This article explains how to connect to data that has been shared with you using Remote Data Access.



Description

In Sage 50cloud Accounts v27 and above, Remote Data Access is set up and managed entirely within the User Management settings.

If a user is granted Remote Data Access to a company, they [receive an email](#) with details of how to connect. If you don't have access to this email, it is still possible to connect using the following steps:

1. Download and install the [required version of Sage 50cloud Accounts](#).

If you already have the correct version installed, please continue.

2. Open Sage 50cloud Accounts, then, in the Add a company window, click Download.
If the Company Selection window appears, instead click Add Company, then click Download.
3. Click Continue and click OK.
4. If prompted, enter your Serial number, Activation key and Account number and click Next then click OK and click OK.
5. Enter your Sage ID email address and click Continue.
6. If you already have a Sage ID set up, enter your Password and click Log In, then continue to step 8.
If not, enter your Name, Password and Confirm Password, then click Register.
7. Check your emails and enter the Code you have received, then click Continue.
8. Select the company you want to connect to and click Next.
 TIP: In Sage 50cloud Accounts v27.1 and above, if you're unsure if a company is the correct one, to view the unique company ID move your pointer over the information icon. The data owner can compare this with their company ID within Help > About > Remote Data Access Information.
9. Enter the Passphrase used when the data was uploaded and click Continue.
 TIP: Please contact the data owner for the passphrase. To view this they can click Settings then click Remote Data Access Settings and click Show Password/Passphrase.
10. Click Download.

You now have Remote Data Access to the company.

Using Remote Data Access at a remote site

The main advantage of Remote Data Access is that you are not tied to using your accounts software at one location. However, 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.
- **Microsoft 365 integration setup** - you can only set up Microsoft 365 integration at the main site. However, once setup, you can use all Microsoft 365 integration features at the remote site except for [document storage](#).