

# Upgrade to Sage 50cloud Accounts

## Sage 50cloud includes the following additional features which enhance the efficiency of the school accounts preparation.

- **Remote Data access (formerly known as Sage Drive)**

Sage 50cloud provides a much easier and more integrated process for setting up remote data access. The system allows for authorised users to update, review, or amend the data in real time in a secure manner. It is an ideal setup for remote working and for **easier collaboration with the school finance management team and with the school accountant.**

- **Bank Feeds**

The bank feeds feature will automatically download the school bank transactions directly into your accounting software. Custom rules can be created to automatically code and post transactions thereby reducing manual input and leading to quicker and more efficient bank reconciliations.

- **Auto update improvement**

Once you install V27.1, future updates are made easier with one-click installation.

- **Adding attachments to supplier invoices, credit transactions and supporting paperwork for journals**

In Sage 50cloud accounts you can attach documents such as supplier invoices and credits, attachments can also be added to journal entries, so they are easy to find for review and audit trail purposes.

Other improvements include the Batch changes option to make changes to multiple records at the same time, rather than amending each record one by one.

Integration with Microsoft 365 is also available.

## FSSU Support & Training

We encourage schools to review the information on bank feeds, for information on how to get started with Bank Feeds [view video](#) created by Sage. The FSSU will provide support and training to those who wish to use this feature over the coming weeks.

The following pages detail the necessary steps to upgrade and set up remote data access, we encourage all schools to make the most of all the new features in Sage 50cloud and the FSSU will provide ongoing support to facilitate and assist schools with the upgrade and use of the new features.

# Steps in upgrading to Sage 50cloud Accounts

## Step 1 – Upgrade to V27.1

All schools must upgrade their current Sage 50 accounts package to Version 27.1 immediately in order to continue access to the package.

[Click here to view steps on updating to Version 27.1](#)

## Step 2 – Upgrade to Sage 50cloud

- 1) Complete the Purchasing form and email to Sage.
- 2) Check that version number under Help/About is V27.1
- 3) Check under Help and About if Sage Drive is active and that it is the main site - it may be N/A if the drive was not set up or had been removed.
- 4) Upon receipt of the confirmation email from Sage, check under Help/About/Licence Info, that the variant is now Sage 50cloud.

Remote data access can now be activated if required and it must be activated on the main machine first and then upgrade the remote machines. All machines must have the same version of Sage running for remote data access to function.

## Step 3 – Manage remote data access

### Instructions

- Click on Settings > User management > Users.
- Select manager > Click Edit.
- Click Allow Remote Data Access
- Follow the onscreen 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.

## Step 4 – 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 quote for the extra-users' licence.

### 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 27.1 as the school and know their username, password, and passphrase to establish a successful link to the schools' data on the cloud.

## Step 5 – Setting up Sage 50cloud and using remote data access on a remote PC or laptop

- Download V27 of Sage 50
- Have a sage account setup at [www.my.sage.co.uk](http://www.my.sage.co.uk)
- Run V27, at Company setup stage, select Remote Data Access and follow the onscreen 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.
- Large processes such a running year end and direct bank feeds should only be done at the main site PC.
- Take note and follow up on any warnings that the main PC is not connected to the drive as any changes made while the main PC is offline 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.