

Setting up Remote Data Access

When you first [set up Remote Data Access](#), to ensure a smooth process, we recommend the following:


- **Encryption passphrase** - during the setup process you enter an encryption passphrase. It's important to remember this password for when you download data at remote sites. In Sage 50 Accounts v27 and above, the manager user can check the passphrase within the [Remote Data Access Settings on the Settings menu](#).
- **Sage ID login** - each individual remote Sage user that uses Remote Data Access should have their own Sage ID login.

Steps in setting up Remote Data access

1. Open Sage 50 Accounts and log in as MANAGER.
2. Click **Settings** then click **User Management** and click **Users**.
3. To create a new user, click **New**.
Alternatively, select an existing user, click **Edit**, click **Remote Data Access** then proceed to step 7.
4. Select the relevant user type, then click **Continue**
5. Enter the user profile details as required, then click **Continue**
6. If creating a Standard user, or Accountant or Bookkeeper, set the required access level and click **Continue**
7. If you have not yet connected your Sage ID to this company, click **Get started with Sage ID**. If this option doesn't appear, your Sage ID is already connected.
8. To grant the user Remote Data Access, select the **Allow Remote Data Access** check-box, if prompted enter the user's First Name, Last Name and Email address, then click **Continue**.
9. Sage 50 Accounts v27.1 and above - Enter and confirm the passphrase to be used when remote users connect to your data, then click **Continue**.

The passphrase must be at least 15 characters in length and must contain at least one uppercase and one lowercase character. There is no maximum character length.

10. Check the user summary details then click **Save**.

 **NOTE:** To grant a user Remote Data Access the MANAGER user is also granted access, if they don't already have it.

11. If this is the first time you have uploaded your data to Remote Data Access, if prompted enter a **Passphrase** and **Confirm passphrase**, then click **Upload data**.

You have now set up Remote Data Access. Any users you have added are [sent an email](#) with details on how to connect.

If you forget your Passphrase, the data owner can view this in Sage 50 Accounts.

Click **Settings** then click **Remote Data Access Settings** and click **Show Password/Passphrase**.