

Access a Company Remotely using Remote Data Access

Summary

With Sage 50 Accounts Remote Data Access 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


Remote Data Access is set up and managed entirely within the User Management settings.

You must have:

1. The same version installed.
2. The passphrase (The Manager user can check this in the RDA settings.)
3. Your username and password.
4. If you don't have access to the invitation email you must get the registration details from the Main PC.
The manager user – Help – about – Licence Information

If granted Remote Data Access to a company, you will receive an email with details of how to connect.

Steps to Access the company data

1. Accept the invitation link in the invitation email.
2. Sign in with your Sage ID
3. Once access is confirmed as Active select Close.
4. Open Sage 50 Accounts and click Add Company.
5. Select Download, then click Continue and if required click OK.
6. Enter your Sage account email and password and click Log In.
7. Select the company you want to connect to and click Next.
8. Check the Dataset ID by hovering over the information symbol. 
9. Enter the Passphrase created by the MANAGER user and select Continue, then Download.

You now have Remote Data Access to the company.

If you don't have access to this email, it is still possible to connect using the following steps:

Note: The Manager must already have added your email to the user list on the Main PC.

1. Open Sage 50 Accounts, click Add Company
2. Select Download and click Continue and click OK
3. If prompted enter your registration details;
 - ❖ Serial number,
 - ❖ Activation key and
 - ❖ Account number
4. Click Next - OK and OK again
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: 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, 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.