

Sage 200 Online

Customer Guide

2013 R2

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Updates to this guide

The following updates have been made to this guide since the release:

Topic	Information Update	Location	Release date and Issue No
Integrating with SharePoint in Office365	The icons within Sage ERP Online Services have been updated to reflect Sage ERP Online Services version 1.3 user interface.	Chapter 6	25 April 2014 4531
Manage your site using Sage ERP Online Services	The icons within Sage ERP Online Services have been updated to reflect Sage ERP Online Services version 1.3 user interface.	Chapter 7	25 April 2014 4531

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Introduction

This guide complements the help provided in Sage ERP Online Services and provides you with the information you need to deploy and manage Sage 200 Online 2013 R2. Some of the tasks are performed within Sage ERP Online Services, some within Sage 200 Online Administration, and some within the Sage 200 App.

If you have purchased Sage 200 Online, then your Sage Business Partner will have created a site for you online. Either the Business Partner or you can perform the other tasks required - deploying Sage 200 Online Administration and the Sage 200 App, identifying the URL for the Sage 200 Web Client, creating and managing users and backing up and restoring from backups. This depends on the agreement you make with your Sage Business Partner.

Upgrading from Sage 200 On Premise or from an earlier version of Sage 200 Online is handled by your Business Partner.

Before you can access Sage 200 Online, you must:

- Sign into Sage ERP Online Services.
See [Sign into Sage ERP Online Services on page 3](#).
- Create users in Sage ERP Online Services.
See [Add users and assign them to your site on page 5](#).
- Deploy Sage 200 Online.
See [Deploying Sage 200 Online on page 9](#).

You can also:

- Integrate Sage 200 Online with Microsoft Office365.
See [Integrating with Office365 on page 35](#).

- Integrate Sage 200 Online with Microsoft SharePoint/

See [Integrating with SharePoint in Office365 on page 39](#).

For regular operation of Sage 200 Online, you will continue to use Sage ERP Online Services to:

- Manage users.
- Manage sites.
- Manage backups.

See [Manage your site using Sage ERP Online Services on page 43](#).

Sign into Sage ERP Online Services

You need Sage ID credentials to sign into Sage ERP Online Services. As a customer you will receive your Sage ID credentials from your Business Partner.

1. In a browser window, enter the Sage ERP Online Services URL:
<https://www.sageerponlineservices.com>
2. Enter your Sage ID **Email** address.
3. Enter your Sage ID **Password**.

For security reasons, if you are using a shared computer, we recommend that you do **not** select **Remember me on this computer**.

Did you forget your password?

- a. Click the link to reset it.
- b. Enter your email address.
- c. Enter the **Captcha** details in the box provided.
- d. Click **Continue**.
- e. Follow the instructions in the email you receive to reset your password.

Logging out

Whenever you want to sign out of Sage ERP Online Services you can:

1. Select your Sage account drop-down at the top right hand of the window.
2. Click **Logout**.

For security reasons, if you are signed on to the Sage 200 Web Client and log out of Sage ERP Online Services, you will also be logged out of the Sage 200 Web Client, and vice versa.

Add users and assign them to your site

The first activity you will need to do in Sage ERP Online Services is to add users.

There are other activities you will want to perform for users, for example, editing users, deleting users, locking and unlocking users and assigning users to sites. These are described later. See [Manage users on page 44](#).

User roles

A user in your organisation can be assigned any of the following roles:

Customer Administrator	<p>The Customer Administrator role allows you to access Sage 200 Online Administration and the Sage 200 App.</p> <p>The Customer Administrator role is the contact point between your Business Partner Organisation and the customer organisation.</p> <p>If you have this role you can add users with the roles Customer Administrator or Customer Operations Agent in Sage ERP Online Services, and accept terms and conditions.</p>
------------------------	--

Customer Operations Agent	<div data-bbox="406 219 1350 315">The Customer Operations Agent role allows you to access Sage 200 Online Administration and the Sage 200 App.</div> <p>The Customer Operations Agent role allows you to perform operational activities for the customer within Sage ERP Online Services, for example, backup sites.</p> <p>If you have this role you can add users with the roles Customer Operations Agent or Customer User.</p>
Customer User	<div data-bbox="406 548 1350 600">The Customer User role allows you to access the Sage 200 App.</div> <p>If you have this role you can access Sage ERP Online Services to deploy the Sage 200 App.</p>

The role determines whether you can access Sage ERP Online Services and what you can do within it. It also determines whether you can access Sage 200 Online.

Depending on the size of your organisation, you may have one Customer Administrator, one Customer Operations Agent, and many Customer Users. Or, you may have one person fulfilling a number of roles. For example:

- Customer Administrator and Customer Operations Agent.
- Customer Administrator, Customer Operations Agent and Customer User.
- Customer Operations Agent and Customer User.

Example scenario

Your role is to manage users, data and software in your organisation. The person in your organisation who is the direct contact for the Business Partner organisation is given the role of Customer Administrator in Sage ERP Online Services by the Business Partner. The Customer Administrator logs on to Sage ERP Online Services, adds you as a user and gives you the role of Customer Operations Agent.

Now you can deploy Sage 200 Online Administration and the Sage 200 App and set these up. You can also add users with the role of Customer User in Sage ERP Online Services.

Most users you add will be the users who will use Sage 200 on a regular basis. These users have the role Customer User. Customer Users can access Sage ERP Online Services to download and install the Sage 200 App. They can only access the Sage 200 App and only when you assign them to a site within Sage ERP Online Services.

IMPORTANT

To deploy Sage 200 Online and set it up your Sage ERP Online Services user account role must be assigned the Customer Operations Agent role.

To add users

 **Open:** Sage ERP Online Services > Organisations > Users.

1. Click **Add user**.
2. Enter the user name.

Two entries make up the user name: **Name** and **LastName**.

The user name is used as the **System Name** in Sage 200. If you have more than one user with the same name in your organisation, when you create the users, enter numbers or middle initials to differentiate between them.

For example, if you have two John Smiths, and one has the middle initial A, enter for this John:

Name	John A
LastName	Smith

For the John Smith without a middle initial, enter:

Name	John
LastName	Smith

3. Enter the user's **Email** address.
4. Select the user role.

You can select more than one role for a user.

The organisation is already selected. This is the customer account set up for you by your partner.

Depending on your role, you will be able to add users with different roles.

- If your role is Customer Administrator, you can select Customer Administrator or Customer Operations Agent for the role.
- If your role is Customer Operations Agent, you can select Customer Operations Agent or Customer User for the role.

5. Click **Save**.

An email is sent to the user's **Email** address with a link to create a Sage ID.

When the user clicks the link in the email to finish creating the Sage ID, the user creation process is complete and you can assign the user to your site.

To assign users to your site

 **Open:** Sage ERP Online Services > Dashboards > Site Dashboard.

1. Click the site **Name**.
2. Click **Assign user**.

3. Select the **User**.
4. Select the **Role**.

If the user has more than one role, you must select one of their roles for the site. If you assign Customer User, the user can access Sage ERP Online Services and the Sage 200 App, but not Sage 200 Online Administration. If you assign a user with Customer Operations Agent, the user will be able to access Sage ERP Online Services, the Sage 200 App and Sage 200 Online Administration.

5. Click **Save**.

Deploying Sage 200 Online

Deploying Sage 200 Online is done from within Sage ERP Online Services. Sage ERP Online Services is the interface which is used to manage online subscriptions and services for Sage products.

You will have been given a role - most likely Customer Administrator - when you initially discussed deploying Sage 200 Online with your Sage Business Partner.

The following steps are done from within Sage ERP Online Services. Some steps can be done by the Customer Administrator and others by other roles. For example, a Customer Operations Agent can add users who use the Sage 200 App, but who do not have access to Sage 200 Online Administration. You can have more than one Sage ERP Online Services role.

Overview of deploying Sage 200 Online:

1. Sign into Sage ERP Online Services.
2. Add users.

Users can have more than one Sage ERP Online Services role. Different roles have different permissions both in Sage ERP Online Services and in Sage 200 Online.

The following roles are available within Sage ERP Online Services.

- Customer Administrator.
- Customer Operations Agent.
- Customer User.

Only Customer Administrator and Customer Operations Agent roles have access to Sage 200 Online Administration. The Customer User role has access only to the Sage 200 App.

3. Fetch and set up Sage 200 Online Administration.

4. Fetch and set up the Sage 200 App.

Sage 200 Online Administration and the Sage 200 App are installed using Microsoft ClickOnce technology.

5. Fetch and set up a desktop shortcut for the Sage 200 Web Client. This is the Web URL for Self Service.

IMPORTANT

If you need to uninstall and reinstall Sage 200 Online Administration or the Sage 200 App:

You must close Sage 200 Online Administration and the Sage 200 App, before uninstalling on your local PC. Use **Add/Remove programs** in the usual way on the local PC to uninstall the programs. Afterwards, reinstall by selecting the links in Sage ERP Online Services again.

Deploying Sage 200 Online Administration

At various points throughout the process you will be asked to sign into Sage ID to authenticate who you are.

When a new site status is *Ready*, you can deploy Sage 200 Online clients.

Within Sage ERP Online Services:

 **Open: Dashboards > Site Dashboard.**

1. Select the site **Name**.
2. Click the link for **Administration**.

Depending on the browser you are using, you are presented with a different sequence of actions to deploy the client. You might be asked to click **Install** immediately, or you might need to perform another action first, for example, to download the file into the local downloads folder on your PC.

Follow the instructions in the browser to install the Administration client locally.

The length of time this takes depends on your network connection, but takes a minute on a typical ADSL broadband connection.

When this is complete, Sage 200 System Administration will open and you can create a configuration database. This takes a few minutes.

You can only create one configuration database at a time. If you are setting up more than one site for a customer or customers, and try to create the configuration database for both or all at the same time, you may get error messages in all but one System Administration. To solve this, log out of any System Administration where you see the error message, and log back in after the configuration database has successfully created in the first site. The configuration databases on the sites that displayed the error will also have been created successfully so once logged back in, the setup process will continue automatically.

Within Sage 200 System Administration:

- Create your company databases.

Each Sage 200 company has a database.

- Set up user accounts.

You specify which companies the users can access and which System Administration roles the users belong to.

These are different roles from the roles in Sage ERP Online Services.

- Create roles and authorise features.

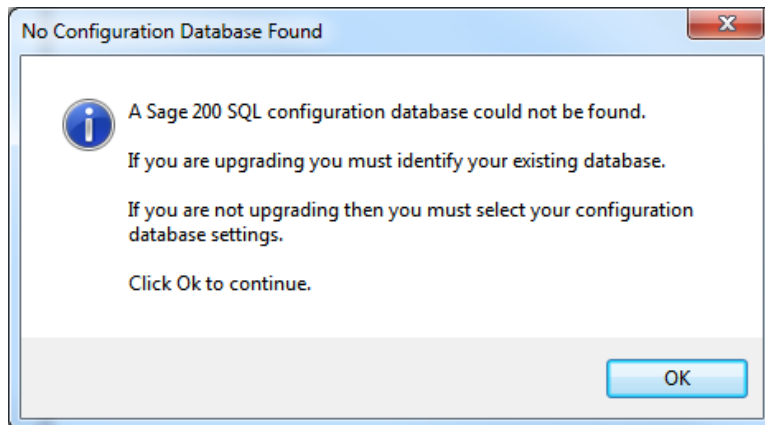
System Administration roles are used to specify which parts of the Sage 200 Online Desktop client users can access.

You create the role and then authorise the relevant features for that role. Features are the specific menu options in Sage 200.

Create your configuration database

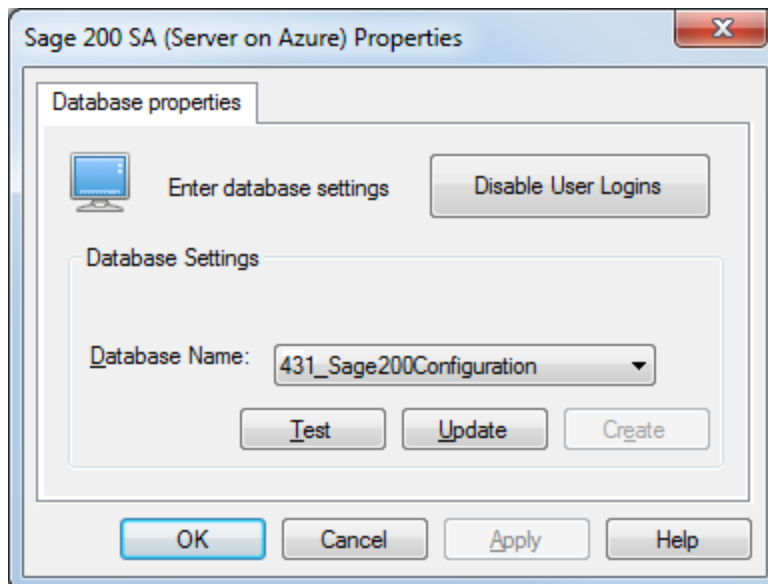
You can only create one configuration database at a time. If you are setting up more than one site for a customer or customers, and try to create the configuration database for both or all at the same time, you may get error messages in all but one System Administration. To solve this, log out of any System Administration where you see the error message, and log back in after the configuration database has successfully created in the first site. The configuration databases on the sites that displayed the error will also have been created successfully so once logged back in, the setup process will continue automatically.

1. System Administration opens automatically. The following message appears:



2. Click **OK** to create a new configuration database.

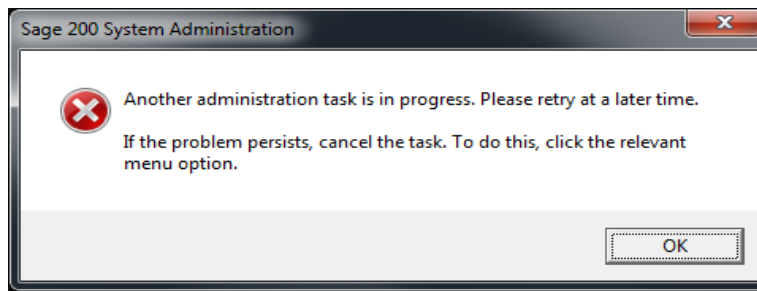
The **Server Properties** window appears.



3. Click **Create** to create the configuration database.

There are a number of processes running during the creation process, so the creation of the database can take some time.

If another Sage 200 Administration user is also attempting to create the configuration database at the same time, you will see the message:



Check with any other Administration users of Sage 200 and try again.

4. Click **Test** or **Update** to test or update the company details.
5. When the creation process has finished, click **OK**.

Manage user lists

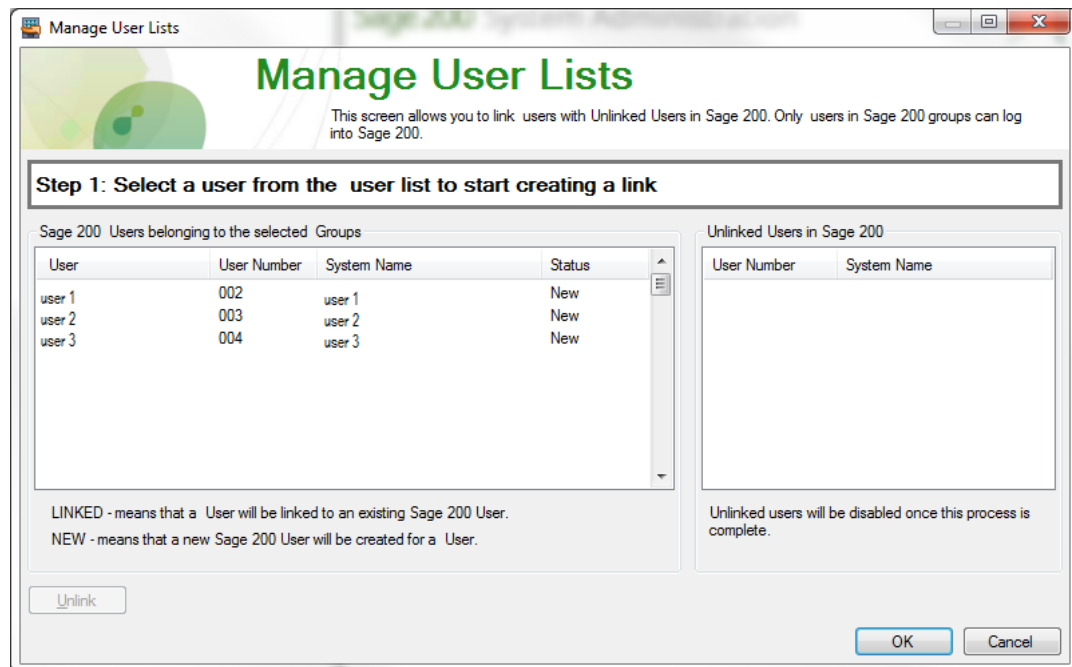
When you have created the configuration database, the **Manage User Lists** window appears.

In 2013 R2, users access the Sage 200 App and Sage 200 Online Administration, using their Sage ID account. If the configuration database is new, there will be one list of Sage ID accounts. All accounts listed will have the status *New*. You must click **OK** to create new Sage 200 user accounts for these Sage ID accounts.

For an existing installation of Sage 200, you can match the Sage ID accounts to existing Sage 200 user accounts.

To create your Sage 200 user accounts

1. Check the list of Users on the **Manage User Lists** screen.



2. To create a new Sage 200 user account for all the Sage ID accounts with a status of **New**, click **OK**.

New Sage 200 user accounts are created.

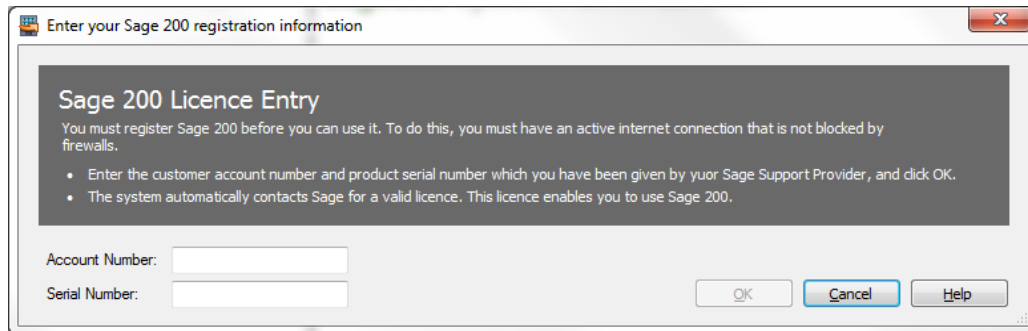
You can also use this screen, at any time, to update your Sage 200 user list. For example, if you add or delete users, or change the users' names in Sage ERP Online Services, this screen is displayed when you open Sage 200 Online Administration. Use this screen to unlink users who have been deleted and to link users who have been added in Sage ERP Online Services. If you have changed user names in Sage ERP Online Services, you must unlink and link the user again.

When you delete a Sage ID user account, the user will still be able to use Sage 200 until you refresh the user list, by using the **Manage User Lists** screen.

Activate your Sage 200 licence

You must register Sage 200 before you can use it. Your licence is activated via the Internet, using the Sage Licensing Service.

To register

The image shows a Windows-style dialog box titled "Enter your Sage 200 registration information". Inside, there's a section titled "Sage 200 Licence Entry" with a message: "You must register Sage 200 before you can use it. To do this, you must have an active internet connection that is not blocked by firewalls." Below this, there are two bullet points: "Enter the customer account number and product serial number which you have been given by your Sage Support Provider, and click OK." and "The system automatically contacts Sage for a valid licence. This licence enables you to use Sage 200." At the bottom, there are two input fields: "Account Number:" and "Serial Number:". To the right of these fields are three buttons: "OK", "Cancel", and "Help".

1. Enter your customer **Account Number**.

This is the Customer **Sage Account Id** found in the **Customer data** section of the customer details within Sage ERP Online Services.

2. Enter your product **Serial Number**.

The serial number is found in the **Site details** within Sage ERP Online Services.

3. Click **OK**.

The system automatically contacts Sage for a valid licence. This licence enables you to use Sage 200.

Once the licence has been activated, the core components are automatically installed.

You can now access the Sage 200 Online Administration client and set up your companies, users and roles.

Create company

You can use Sage 200 Online Administration to create Sage 200 companies. The company database schema is built using Windows Azure SQL Database. If you have deployed an add-on that extends this, this will be built at the same time.

You can also create Sage 200 companies from bacpacs. A bacpac stores information about server level objects in the database schema - tables, views, instance objects and so on - as well as the data that is held inside the database. If you have company data that has been created on a local SQL Server, for example, and you want to add this data to the Windows Azure Server, you must create a bacpac from the local SQL Server data set. Then upload the bacpac to the company site. For more information, see [Manage backups on page 53](#). After uploading the bacpac to the site you can create the company using the option below, *To create a company from an uploaded bacpac*.

Tip:

We recommend that you practise setting up your Sage 200 system and processing data. To do this you can use the Demonstration Company data provided with Sage 200.

The demonstration data is available to add to the site as a bacpac in Sage ERP Online Services. If you don't know where the Demonstration Bacpac is, ask your Business Partner to help you.

To create a new company database



Open: System Administration.

1. From the Navigation bar, choose **Companies**.
2. Right-click and choose **Add New Company**.
3. Enter your **Company Settings**:

Company Name

Enter the name of the company.

This must be at least one character in length and unique.

Do not use the word *Configuration* in the company name.

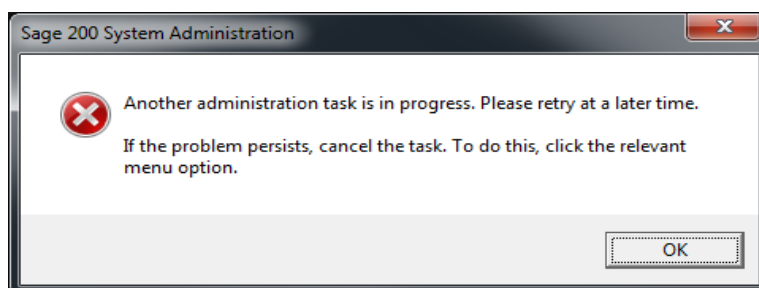
Parent Company

If this is a consolidated company, select the name of the parent company.

For more information about consolidated companies see the Sage 200 help.

4. Click **Create**.

If another Sage 200 Administration user is also attempting to create a database at the same time, you will see the message:



Check with any other Administration users of Sage 200 and try again.

To create a company from an uploaded bacpac

 **Open:** System Administration.

1. From the Navigation bar, choose **Companies**.
2. Right-click and choose **Add New Company from Bacpac**.
3. Enter your **Company Settings**.

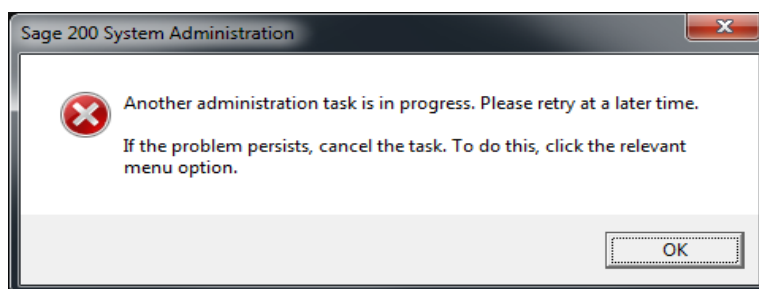
Company Name Enter the name of the company.
This must be at least one character in length and unique.

Do not use the word *Configuration* in the company name.

Parent Company If this is a consolidated company, select the name of the parent company.
For more information about consolidated companies see the Sage 200 help.

4. Select the bacpac to add from the list of **Available Company Baccaps**.
5. Click **Create**.

If another Sage 200 Administration user is also attempting to create a database at the same time, you will see the message:

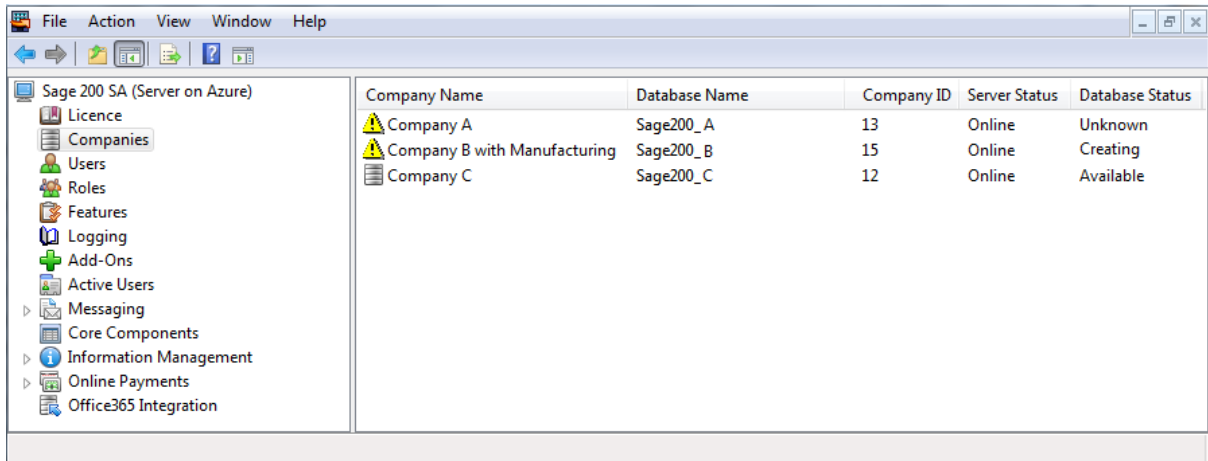


Check with any other Administration users of Sage 200 and try again.

What to do if company creation fails

If your connection to Sage ERP Online Services goes down while you are creating a company, check the company list and review the Server Status and Database Status of the company.

The **Server Status** will show Offline if you have lost connection to Sage ERP Online Services. In this case you may be left with a company in a limbo state. The **Database Status** may show the activity it was attempting to perform when the system went down, for example, *Creating*. Or it may simply show a **Database Status** of *Unknown*. For example:

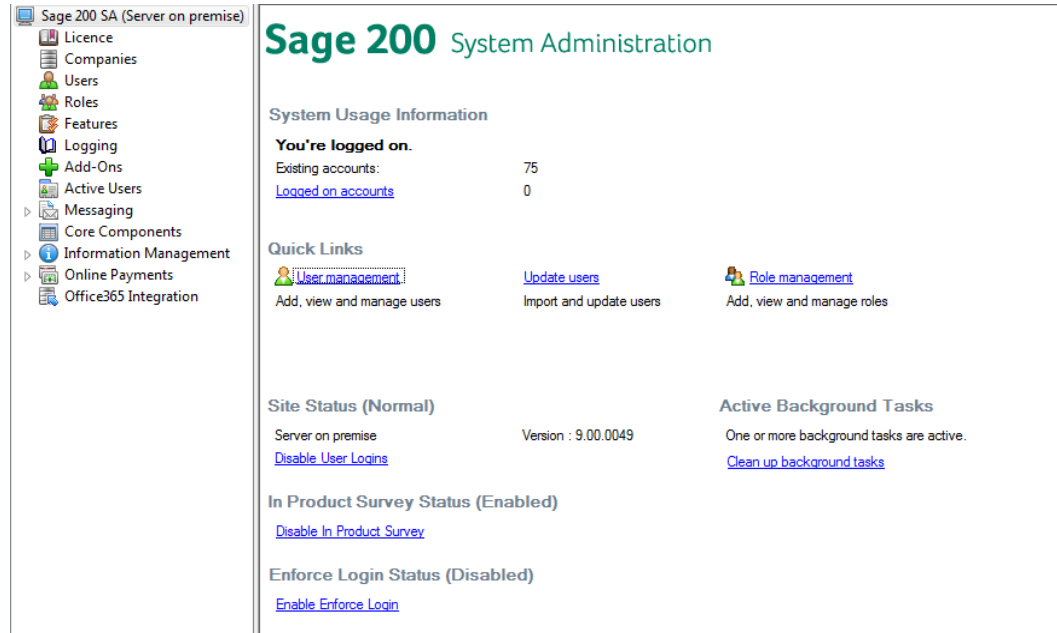


Company Name	Database Name	Company ID	Server Status	Database Status
⚠ Company A	Sage200_A	13	Online	Unknown
⚠ Company B with Manufacturing	Sage200_B	15	Online	Creating
📄 Company C	Sage200_C	12	Online	Available

You can clean up background tasks and delete the company, then try again.

To do this:

1. Check whether there are no other active background tasks by asking other Sage 200 users if they are creating or updating companies currently.
2. If they are not, select **Sage 200 SA**.



Sage 200 System Administration

System Usage Information

You're logged on.

Existing accounts:	75
Logged on accounts	0

Quick Links

User management Add, view and manage users	Update users Import and update users	Role management Add, view and manage roles
---	---	---

Site Status (Normal)

Server on premise	Version : 9.00.0049
Disable User Logins	

In Product Survey Status (Enabled)

[Disable In Product Survey](#)

Enforce Login Status (Disabled)

[Enable Enforce Login](#)

Active Background Tasks

One or more background tasks are active.

[Clean up background tasks](#)

3. Click **Clean up background tasks**.
4. Once you have done that, if the company still remains in the company list, delete it from the company list, by selecting the **Company Name**, right-clicking and selecting **Delete Company**.

Create user roles, and authorise features

Before your users can access the Sage 200 App, you must choose which companies each Sage 200 App user can access and assign at least one role to each Sage 200 App user account.

The role controls which menu options and workspaces a user can access in Sage 200. Each menu option in Sage 200 is listed as a **Feature** in System Administration. To make a menu option available to your users in Sage 200, you must authorise the relevant features for each role.

To set up your user accounts, you must:

1. Create roles.
2. Authorise features for each role.
3. Assign user accounts to each role.
4. Assign companies to each user and set the user properties.

To create user roles

 **Open: System Administration.**

1. From the Navigation bar, choose **Roles**.
2. Right-click and choose **Add New Role**.
3. Enter a **Role Name**.
4. Click **OK**. The **Role properties** window appears.
5. Select the **General** tab. Select from the following options:

Receive alerts From Messenger	Select this to allow members of this role to use Sage Messenger . Users will receive message alerts advising them of system issues and any action that needs to be taken.
Can Edit Own Menu	Select this to allow members of this role to be able to use the Menu Design Mode in Sage 200. Users can edit their own menu within the Menu Design Mode .

6. Select the **Users** tab. Select the users to assign to the role and add them to the **Selected Users** list.
7. Click **OK**.

To authorise features for a role

 **Open: System Administration.**

1. From the Navigation bar, choose **Roles**.
2. Select the relevant role.

3. Right-click and select **Features**.

- To allow the role full access to Sage 200, select the **Features** checkbox.
- To only allow access to certain Sage 200 features, clear the **Features** checkbox and select the required features from the list.

The features are arranged in folders to match the Sage 200 modules. Select the checkbox next to the module folder to allow access to all options within that module. Expand the folders to authorise individual features.



You must authorise the *System Administration Services* feature for all roles that need to log on to the Sage 200 App.


4. Click **OK**.

To assign companies to a user and enter user details


Open: System Administration.

1. From the Navigation bar, choose **Users**.
2. Select a **User Name**.
3. Click **OK**. The **User properties** window appears.
4. Enter the **User Properties** on the relevant tabs.
5. Select the **General** tab. Select from the following options:

User Enabled	Select this to make the user account active. A user account must be active to allow a user to log on to Sage 200.
Can Edit Menus For Roles	Select this to allow the user to edit menus in Sage 200 for their role. For more information about the Menu Design Mode , see the Sage 200 help.  For more information about the Menu Design Mode , see the Sage 200 Help.
Can Edit Workspaces	Select this to allow the user to edit workspaces using the Workspace Designer.  For more information about the Menu Design Mode , see the Sage 200 Help.

Receive Notifications by Email	<p>Select this if you want the user to receive email messages when purchase orders require authorisation in Sage 200.</p> <p>For more information, see the System Administration help.</p> <div>  For more information about the email messages, see the Sage 200 Help. </div>
In Product Survey Enabled.	<p>Select this to allow this user to receive the Sage 200 In Product Survey.</p> <p>This is selected by default.</p> <div> The In Product Survey must be Enabled. For more information see the System Administration help. </div>
Is Web User	<p>Select this to allow the user to access Sage 200 Self Service.</p>

6. Select the **User details** tab. If required, enter information about your user.
7. Select the **Member of** tab. Use this to assign a role to your user.
You must assign at least one role to the user.
8. Select the **Company Access** tab. Use this to assign the relevant companies to the user.
Use the arrow keys to move the company to the **Selected Companies** list.
If you want this user to access all companies, select **Access all Companies**.
9. Click **OK** to save the user properties.

 For more information about user accounts, role, and features, see the System Administration help: <https://support.sage.co.uk/help/sage200/help.htm>.

Set up online payment processing

Online payments are payments that customers make by card, using an online payment provider such as Sage Pay.

To operate online payment processing within Sage 200, you need to set up Sage 200 as follows.

To set up online payment processing

Within the payment service provider:

1. Set up an account with the payment service provider.
Sage Pay is the payment service provider used by Sage 200.
2. Log on to the account and access the settings for the account.
 Enter the IP address of the Windows Azure Server in the payment service provider settings.
 The IP address is: 168.63.57.131

Within Sage 200 System Administration:

1. Add **Vendor accounts**.
 The **Vendor Account** identifier accompanies every payment transaction made with the online payment service provider.
2. Configure the vendor account:
 - a. From the Navigation bar, choose **Vendor Accounts**.
 - b. Right-click and choose **Add New Vendor Configuration**.
 - c. Select **Sage Pay** from the **Payment Type** drop-down list. The **Vendor Configuration** window appears.
 - d. Enter the details required on the various tabs.



For more information about configuring vendor accounts see the System Administration help: <https://support.sage.co.uk/help/sage200/help.htm>.

Deploying the Sage 200 App

When you have deployed Sage 200 Online Administration, you can deploy the Sage 200 App.

Within Sage ERP Online Services:

 **Open: Dashboards > Site Dashboard.**

1. Select the site **Name**.
2. Click the link for the **Sage 200 App**.

Depending on the browser you are using, you are presented with a different sequence of actions to deploy the client. You might be asked to click **Install** immediately, or you might need to perform another action first, for example, to download the file into the local downloads folder on your PC.

Follow the instructions in the browser to install the Sage 200 App locally.

The length of time this takes depends on your network connection, but takes a few minutes to install the first time.

Once the Sage 200 App is installed, it will be kept up to date automatically.

3. When this is complete, Sage 200 Online will open and you can log on.

Within the Sage 200 App:

1. Because you are upgrading, select the company attachment path for the company.
2. Sage 200 consists of a number of integrated core modules. The Financials, Commercials, Project Accounting and Bill of Materials modules are always installed as part of Sage 200 installation and are activated by your licence key.

Before you begin to work with your company data in Sage 200, you must set up each module to work the way you want.

As Sage 200 is an integrated system you only need enter information once, and it will be used elsewhere in the system by the relevant modules.

Before you can enter transactions in Sage 200, you must:

- Set up common information in the Accounting System Manager.
- Set up your nominal accounts in the Nominal Ledger.
- Specify your default nominal accounts in the Nominal Ledger.
- Set up all your customer, supplier and bank account records in Sales Ledger, Purchase Ledger and Cash Book.

The following information in this section provides a list of the essential setup steps required for each of the core modules.



For detailed information about setting up each module, see the Sage 200 help: <https://support.sage.co.uk/help/sage200/help.htm>

Set up Sage modules

Within the Sage 200 App:

- Set up Accounting System Manager.
- Set up Nominal Ledger.
- Set up Cash Book.
- Set up Sales Ledger.
- Set up Purchase Ledger.
- Set up Stock Control.
- Set up Sales Order Processing.
- Set up Purchase Order Processing.
- Set up Project Accounting.
- Set up Bill of Materials.

To set up the Accounting System Manager










The Accounting System Manager controls the integration between the Sage 200 modules. You set up common information used by all the modules in Sage 200.

1. Set up your company address details, contact details and tax details.



Open: Accounting System Manager > Settings > Company Details.

2. Set up the common information that applies throughout Sage 200 such as:

- Tax rates.
 **Open: Accounting System Manager > Settings > Tax Rates.**
- Country codes.
 **Open: Accounting System Manager > Settings > County Codes.**
- Exchange rates.
 **Open: Accounting System Manager > Settings > Currencies and Exchange Rates.**
- Analysis codes.
 **Open: Accounting System Manager > Settings > Maintain Analysis Codes.**
- Customer and supplier roles.
 **Open: Accounting System Manager > Settings > Customer and Supplier Roles.**
- Customer and supplier documents.
 **Open: Accounting System Manager > Settings > Customer and Supplier Document Types.**
- Transaction analysis codes.
 **Open: Accounting System Manager > Settings > Transaction Analysis Codes.**
- Credit information.
 **Open: Accounting System Manager > Settings > Credit Information.**
- Merchant accounts.
 **Open: Accounting System Manager > Settings > Merchant Account Settings.**

3. Enter your operational and transactional settings.

-  **Open: Accounting System Manager > System Operational Settings.**

4. Set up your accounting periods. Sage 200 allows you to use *open accounting periods*. You must specify the maximum number of periods you want to keep open at any one time during your financial year.

-  **Open: Accounting System Manager > Accounting Periods.**

To set up the Nominal Ledger

The Nominal Ledger is where you record the revenue and expenditure of your business.

Transactions recorded in all the Sage 200 modules are recorded here.

1. Enter your Nominal Ledger settings.

-  **Open: Nominal Ledger > Utilities > Ledger Set up > Ledger Settings.**

2. Create your nominal accounts.



Open: Nominal Ledger > Nominal Accounts.

If you are using cost centres and departments with your nominal accounts, set up your cost centre and departments:



Open: Nominal Ledger > Utilities > Ledger Set up > Cost Centre Names.



Open: Nominal Ledger > Utilities > Ledger Set up > Department Names.

3. Set up your default nominal accounts.



Open: Nominal Ledger > Utilities > Ledger Set up > Default Nominal Accounts.

If you are using Sage Payroll and you want to use automated postings from Sage Payroll nominal accounts to Sage 200 Nominal Ledger, install the Nominal Link components.

From the Nominal Ledger Welcome Page, click **Install Nominal Link components** and follow the on screen instructions.

To set up the Cash Book

The Cash Book controls transactions associated with your bank and cash accounts. Use the Cash Book to maintain details of your bank accounts.

1. Set up the details of your bank accounts.



Open: Cash Book > Cash Book Accounts > Enter New Account.

2. Specify your default bank account.

Cash Book > Utilities > Cash Book Settings.

If you are going to use electronic bank reconciliation, install the eBanking components.

From the **Cash Book Welcome Page**, click **Install eBanking components** and follow the on screen instructions.

To set up the Sales Ledger

Use the Sales Ledger to maintain details of your customers. You can record and monitor your transactions with them and control their debts.

1. Enter your sales ledger settings.



Open: Sales Ledger > Utilities > Ledger Set Up > Ledger Settings.

2. Set up your sales ledger analysis codes.



Open: Sales Ledger > Utilities > Ledger Set Up > Maintain Analysis Codes.

3. Create your customer accounts.



Open: Sales Ledger > Sales Accounts > Enter New Account.

To set up the Purchase Ledger

Use the Purchase Ledger to maintain details of your suppliers. You can record and monitor your transactions with them and control your debts.

1. Enter your purchase ledger settings.



Open: Purchase Ledger > Utilities > Ledger Set Up > Ledger Settings.

2. Set up your purchase ledger analysis codes.



Open: Purchase Ledger > Utilities > Ledger Set Up > Maintain Analysis Codes.

3. Create your purchase accounts.



Open: Purchase Ledger > Purchase Accounts > Enter New Account.

To set up Stock Control

Use the Stock Control module to maintain the details of your stock, whether raw materials, finished goods or both. You can record all goods received, exactly where items are located, who supplied them and at what price.

1. Enter your stock control settings.



Open: Stock Control > System Set Up > Stock Control Settings.

2. Set up product groups.



Open: Stock Control > Stock Maintenance > Product Groups.

3. Set up units of measure.



Open: Stock Control > Stock Maintenance > Units of Measure.

4. Set up search categories.



Open: Stock Control > Stock Maintenance > Search Categories.

5. Set up stock locations.



Open: Stock Control > Stock Maintenance > Stock Locations.

6. Set up analysis codes.



Open: Stock Control > Stock Maintenance > Maintain Analysis Codes.

7. Create stock records.



Open: Stock Control > Stock Records > Enter New Stock Item Details.

To set up Sales Order Processing

The Sales Order Processing module manages the sales order process. This includes generating sales orders, through to producing sales invoices.

Sales Order Processing brings your customer information together with the goods and services you supply. These goods and services are priced according to the selling prices and discounts set in the **Price Book** module.

1. Enter your sales order processing settings.



Open: Sales Order Processing > SOP Utilities > System Set Up > SOP Settings.

2. Set up sales order user permissions.



Open: Sales Order Processing > SOP Utilities > System Set Up > User Permissions.

3. Set up additional charges.



Open: Sales Order Processing > SOP Maintenance > Additional Charges.

4. Set up analysis codes.



Open: Sales Order Processing > SOP Maintenance > Maintain Analysis Codes.

5. Set up your pricing and discounts.



Open: Price Book.

To set up Purchase Order Processing

Purchase Order Processing brings together your supplier information and the goods and services that you purchase to generate purchase orders.

1. Enter your purchase order processing settings.



Open: Purchase Order Processing > POP Utilities > System Set Up > POP Settings.

2. Set up your authorisation rules.



Open: Purchase Order Processing > POP Utilities > System Set Up > Maintain Authorisation Rules.

3. Set up analysis codes.



Open: Purchase Order Processing > POP Maintenance > Maintain Analysis Codes.

4. Set up additional charges.



Open: Purchase Order Processing > POP Maintenance > Additional Charges.

To set up Project Accounting

You can set up Project Accounting to suit your type of business and the way that you work. To do this, you will need to make a number of decisions that will affect the way that you use Project Accounting.

Whatever your business needs, you have to:

- Design your project structure.
- Set up your project levels, group levels and project item types.

You will need to configure some Project Accounting settings:

- Choose a project coding method.
- Decide how to use budgeting.
- Decide how to allocate overhead costs.
- Decide how to deal with committed costs.
- Define time and materials pricing rules.
- Configure your Project Accounting integration settings.
- Define your project terminology.

You will need to configure some project structure settings:

- Set up your project levels, group levels and project item types.
- Set up your groups and project items.
- Define additional information fields.
- Decide whether to use project templates.
- Decide how you will bill your projects.
- Define project statuses.
- Define units of measure.

To set up the system for recording timesheets and expense claims, you will need to:

- Choose your timesheets and expense claims settings.
- Specify your integration settings if you are going to post transactions to Financials, Project Accounting or Payroll.
- Set up your expense items and categories.
- Set up your resources (timesheet users), organise them in a hierarchy, and set their cost charge rates.

To set up Bill of Materials

1. Set up supplier and customer details, stock control system, sales order processing and purchase order processing defaults.
2. Set up Overhead Recovery Settings, Cost Headings, Analysis Codes and Nominal Settings.
3. Enter details in the Labour Register.
4. Enter details in the Machine Register.
5. Set up the Tool Register.
6. Set up the Operations Register.
7. Enter details in the Drawing Register.
8. Set up Bill of Materials.
9. Add BOMs.



For detailed information about the settings for each module, see the Sage 200 help:
<https://support.sage.co.uk/help/sage200/help.htm>

Install a shortcut for the Sage 200 Web Client

You can install a shortcut for the Sage 200 Web Client. This lets you access Sage 200 Online data using a web browser, if **Is Web User** is selected on your user account in System Administration.

You can do the following activities in the Self Service application:

- Access workspaces.
- Authorise purchase orders.
- Enter and authorise timesheets and expense claims.

To install a shortcut for the Sage 200 Web Client



Open: Sage ERP Online Services > Dashboards > Site Dashboard.

1. Select the site **Name**.
2. Click the link for the **Sage 200 Web Client**.

This opens the Sage 200 Self Service application.

3. Copy the URL and send it to your users, along with instructions to create a desktop shortcut of the URL.

You can also create a desktop shortcut of the URL for yourself.

Troubleshooting the site installation

IMPORTANT

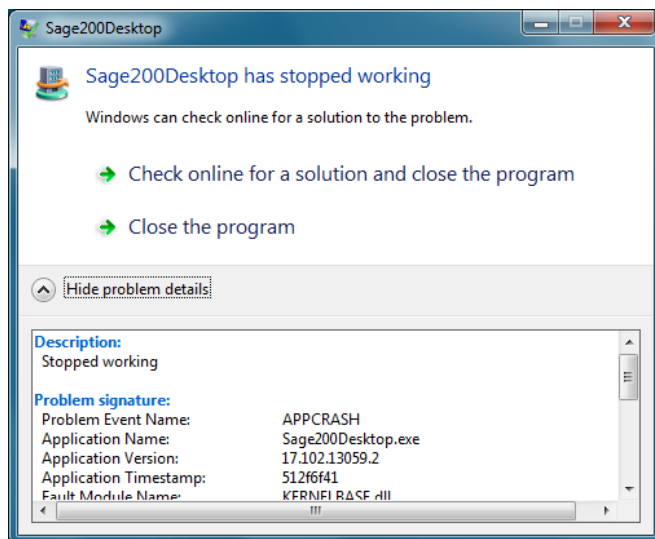
If you need to uninstall and reinstall Sage 200 Online Administration or the Sage 200 App:

You must close Sage 200 Online Administration and the Sage 200 App, before uninstalling on your local PC. Use **Add/Remove programs** in the usual way on the local PC to uninstall the programs. Afterwards, reinstall by selecting the links in Sage ERP Online Services again.

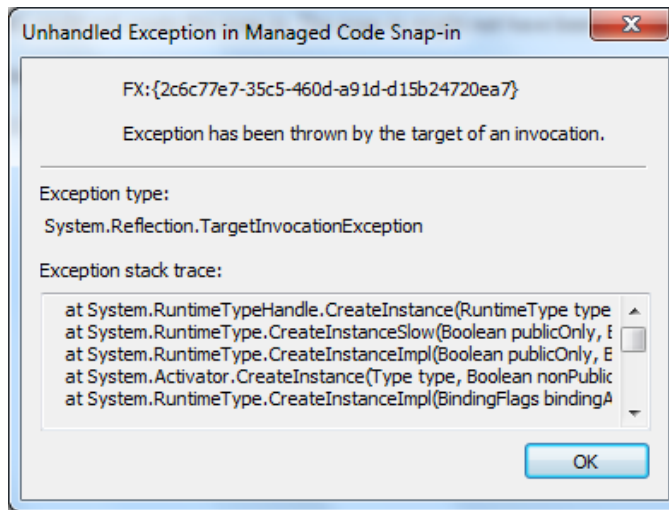
The .Net Framework v3.5 is not installed

The .Net Framework v3.5 is one of the prerequisites for the client machine. If the .Net Framework v3.5 is not installed on your client machine you will see one of the following errors when accessing the Sage 200 Online Administration or the Sage 200 App. The exact error depends on your operating system.

- When opening the Sage 200 App, the following error message is displayed:
Sage200Desktop has stopped working.



- When opening Sage 200 Online Administration, the following message is displayed: **MMC Snap-in: MMC has detected an error in a snap-in and will unload it.** When clicking Continue, the following exception message is displayed:



To resolve these errors, install .Net Framework v3.5.

Integrating with Office365

You cannot use the special Sage 200 functions in the Excel Integration module if you are using Sage 200 Online, even if you integrate with Office365.

You can integrate Sage 200 with Office365. When you integrate, you can:

- Export all or selected information from workspaces to Excel.
- Export list items from Sage 200 forms to Excel.

If you have the Microsoft Outlook Client installed on the client PC, you can:

- Open Outlook from email addresses.
- Attach reports as PDF attachments to an email.

When you have integrated Sage 200 with Office365, your spreadsheets or documents will open in the Microsoft Office Client (i.e. Excel) or in the Excel browser application, using your default browser, depending on how you have set up Office365.

Setting up the integration is done using the following steps:

1. Set up document library in Sharepoint 2013 Online.
2. Register Application in Sharepoint 2013 Online.
This will add the application to your TeamSite in SharePoint Online.
3. Enter Application ID and Application Secret into Sage 200 via System Administration.
To integrate successfully with Office365, System Administration must store the application details which are needed to request and share authorisation access between the client and SharePoint.
4. Link Sage 200 to Sharepoint 2013 Online.

To complete the integration you must select the details you added in the Office365 list within System Administration and select **Action > Complete Integration**.

5. Add the permission request to Sharepoint 2013 Online.

This confirms to SharePoint that the application is trusted for:

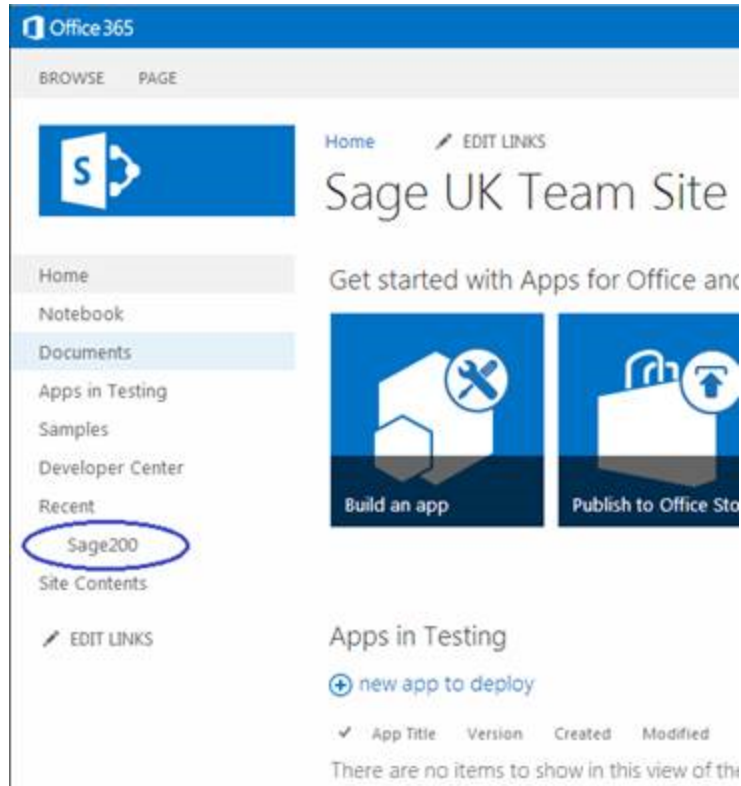
- Editing or deleting documents and list items in the site or site collection.
- Accessing basic information about users of the site.

To set up integration between Sage 200 and Office365

1. Set up document library in Sharepoint 2013 Online.
 - a. Log in to your SharePoint site from <https://login.microsoftonline.com>.
 - b. Click on **Sites**.
 - c. Click on the **Team Site**.
 - d. Click on the **Site Contents** and select **Add an app**.
 - e. Click on **Document Library** to add a new library.
 - Enter the library **Name**, Sage200.

Do not include spaces in Sage200.

 - Click **Create**.
 - f. Verify that the library has been created by checking that is listed in the **Recent** folder.



2. Register Sage 200 in Sharepoint 2013 Online.

- a. Open your web browser.
- b. Go to the following secure link, inserting your own Sharepoint company name:
https://<companyname>.sharepoint.com/_layouts/15/appregnew.aspx

You must use a secure SSL - https, not http.

- c. Select **App Type: An app running on a web server**.
- d. Click **Generate** to create an **App Id** and **App Secret** on the displayed page.
- e. Enter a **Title**.
- f. Enter the **App Domain**.
For online, this should include the site name and sage200online.com.
For example, //<sitename>.sage200online.com
- g. Enter the **Redirect URL**. This is the self service URL with /Office365/ on the end.
For online, this would be:
//<sitename>.sage200online.com/Sage200SelfService/Office365/
The **Redirect URL** takes the details and writes them to the configuration database and completes the operation.
- h. Click **Create**.
- i. Click **OK**.

Keep a note of the Client ID, Client Secret, Title, App Domain and Redirect URL so that you can enter this information into Sage 200 System Administration.

3. Within Sage 200 System Administration:



Open: Office365 Integration.

- a. Select the **SharePoint URL** displayed, right click and select **Add Office365 Integration Settings**.
- b. Enter the SharePoint Address.
This is the secure link (using SSL - https) that you registered. For example:
https://<companyname>.sharepoint.com/
- c. Enter the **Application ID**. This was generated as the **Client ID** when you registered the application on SharePoint.
- d. Enter the **Application Secret**. This was generated as the **Client Secret** when you registered the application on SharePoint.
- e. Click **Create**.
- f. Click **OK**.

4. Within Sage 200 System Administration:



Open: Office365 Integration.

- Select the **SharePoint URL** displayed, right click and select **Complete Integration**.

- Refresh the list and you will see that the **Context Token** has been filled with information.

5. Finally, add permissions in SharePoint Online.

- a. Open your web browser.
- b. Go to the following secure link, inserting your own company name:
https://<companyname>.sharepoint.com/_layouts/15/appinv.aspx

You must use a secure SSL - https, not http.

- c. Copy in the **Application ID** from System Administration.



Open: Office365.

- i. Select the SharePoint URL, right click and select **Properties**.
- ii. Copy the **Application ID**.
- iii. Click **Lookup**.

The application fields are populated. If they are not, check that you have entered the **Application ID** correctly.

- iv. In the **Permission Request** box, enter the following xml:

```
<AppPermissionRequests AllowAppOnlyPolicy="true">
  <AppPermissionRequest Scope="http://sharepoint/content/sitecollection" Right="Write" />
</AppPermissionRequests>
```

- v. Click **Create**.
- vi. Click **Trust It**.

Integrating with SharePoint in Office365

If you want to run queries on your database in Sage 200 Online, you will need to do activities in a range of products and in sequence to set up the integration that allows you to do this.

Prerequisites

You must:

- Know how to create add-on packages for Sage 200.
- Understand that SharePoint Online 2013 is found within Office365, which is online.
- Be familiar with:
 - SQL.
 - Office365.
 - SharePoint Online 2013.
 - SharePoint Designer, which is a downloadable from Microsoft.

High level overview of the integration process

This is a complex process. If you need to do this, ask your Business Partner for assistance. Your Business Partner has access to a more detailed set of instructions for the integration.


We recommend that only attempt this process if you have Office365 and SharePoint expertise.

1. Within Sage ERP Online Services:

- Backup company database.




Open: > **Dashboards** > **Site Dashboard**.

- Select the site **Name** to drill down to the site details.
- Locate the database **Name** in the list of **Databases** and click the **Backup**  icon alongside the database.

- Fetch the database connection string and copy and paste it into a .txt file for use in step 6.



Open: Sage ERP Online Services > **Dashboards** > **Site Dashboard**.

- Select the site **Name** to drill down to the site details.
- Locate the database **Name** in the list of **Databases** and click the **Connection string**  icon alongside this database.

Remember to copy and paste the string into a .txt file for use in step 6.

2. Within a local version of SQL:

- Restore backup of company database.
- Build a view of the query you want to run.

3. Within SharePoint Online:

In SharePoint Admin Console, enter credentials for external data point.

4. Within SharePoint Designer:

- Open site and create new external content type.
- Add connection between your site and local SQL.
- Set up permissions for read and read list operations.
- Create lists and forms.
- Save external content type to your SharePoint Server.
- Name external list.

5. Create Sage 200 add-on package.

The current maximum limit of the add-on size is 50 MB for Sage 200 Online. This is the maximum compressed size of the sdbx file. When uncompressed, the files must not be over 120 MB.

The size of the add-on that you can upload is also restricted by the internet connection speed between your SAA client and Sage 200 Server.

6. Within SharePoint Designer:

- Select the external content type you have created.
- Use the connection string you fetched in step 1 to point the external content type to the Sage 200 Online company database.

7. Within SharePoint Online:

- In SharePoint Admin Centre, select bcs (business connectivity services).
- Set connectivity and metadata store permissions for the external content type you created in step 4.

You can now browse to your SharePoint site and select the list for your external content type and open it.

Manage your site using Sage ERP Online Services

There are many activities you will need to perform using Sage ERP Online Services. You will find help on how to do these activities in Sage ERP Online Services help. However, a quick overview of the following activities is given in this chapter:

- Manage users.
- Manage sites.
- Manage backups.
- Set up, access and view subscriptions.
- View subscription terms and conditions.

Manage users

There are various activities that you need to do within Sage ERP Online Services and other activities that you must do in Sage 200 Online Administration.

Within Sage ERP Online Services

Add users

 **Open: Organisations > Users.**

1. Click **Add user**.
2. Enter the user name.

Two entries make up the user name: **Name** and **LastName**.

The user name is used as the **System Name** in Sage 200. If you have more than one user with the same name in your organisation, although they have a unique ID in Sage 200, you may find it difficult at times to differentiate between the two users. In this case, when you create the users, enter numbers or middle initials to differentiate between them.

For example, if you have two John Smiths, and one has the middle initial A, enter for this John:

Name	John A
LastName	Smith

For the John Smith without a middle initial, enter:

Name	John
LastName	Smith

3. Enter the user's **Email** address.
4. Select the user organisation. This is either a partner or customer.
5. Select the user role.

Depending on your role and the organisation selected, you can add users with different roles.

Role	Can create user for organisations:	With roles:
Customer Administrator	Customer	Customer Administrator Customer Operations Agent

Role	Can create user for organisations:	With roles:
Customer Operations Agent	Customer	Customer Operations Agent Customer User
Customer User	None	None

6. Click **Save**.
7. An email is sent to the user's **Email** address with a link to create a Sage ID.
8. When the user clicks the link in the email to finish creating the Sage ID, the user creation process is complete.


Edit users

 **Open: Organisations > Users.**

1. Select the user **Name**.
2. Amend the user details.
3. Click **Save**.


Delete users

 **Open: Organisations > Users.**

1. Select the user **Name**.
2. Click **Delete** .


Lock users

 **Open: Organisations > Users.**

1. Select the user **Name**.
2. Click **Lock** .

Unlock users

 **Open: Organisations > Users.**

1. Select the user **Name**.
2. Click **Unlock** .

Assign users to sites

 **Open: Dashboards > Monitoring.**

1. Select the customer **Name**.
2. Select the site **Name**.

3. Click **Assign user**.
4. Select the **User**.
5. Select the **Role**.
6. Click **Save**.

Within Sage 200 Online Administration

Update users



Open: System Administration.

- Click **Update Users** on the information page displayed.



Open: System Administration > Users.

- Select **Action > Update Users**.

The **Manage User Lists** window appears.

Only link users if it is the same user in both lists.

1. To link a Sage 200 user with an unlinked user:
 - a. Select a user in the list of Sage 200 users.
 - b. Select a user in **Unlinked Users**.
2. To unlink a Sage 200 user which you have linked:
 - a. Select the *Linked* user in the left hand list of Sage 200 users.
 - b. Click **Unlink**.
3. To update your Sage 200 user list, click **OK**.
 - New Sage 200 users are created for all users where **New** has been specified.
 - Existing Sage users are granted system IDs where **Linked** has been specified.

Edit user details

1. From the Navigation bar, choose **Users**.
2. Select a **User Name**.
3. Click **OK**. The **User properties** window appears.
4. Enter the **User Properties** on the relevant tabs.

5. Select the **General** tab. Select from the following options:

User Enabled	Select this to make the user account active. A user account must be active to allow a user to log on to Sage 200.
Can Edit Menus For Roles	Select this to allow the user to edit menus in Sage 200 for their role. For more information about the Menu Design Mode , see the Sage 200 help.
Can Edit Workspaces	Select this to allow the user to edit workspaces. For more information about the Workspace Designer , see the Sage 200 help.
Receive Notifications by Email	Select this if you want the user to receive email messages when purchase orders require authorisation in Sage 200. For more information, see the System Administration help.
In Product Survey Enabled.	Select this to allow this user to receive the Sage 200 in product survey. This is selected by default.

The **In Product Survey** must be **Enabled**. For more information see the System Administration help.

6. Select the **User details** tab. If required, enter information about your user.
7. Select the **Member of** tab. Use this to assign a role to your user.
You must assign at least one role to the user.
8. Select the **Company Access** tab. Use this to assign the relevant companies to the user.
Use the arrow keys to move the company to the **Selected Companies** list.
If you want this user to access all companies, select **Access all Companies**.
9. Click **OK** to save the user properties.

Assign users to roles

1. From the Navigation bar, choose **Users**.
2. Select a **User Name**.
3. Click **OK**. The **User properties** window appears.
4. Select the **Member of** tab.

5. Assign roles.

- To assign one or more roles:
 - Select the roles you want to assign from the **Available Roles** list.
 - Click > to move the role to the **Selected Roles** list.
- To assign all roles:
 - Select all the roles in the **Available Roles** list.
 - Click >> to move all roles to the **Selected Roles** list.

Assigned roles are available to the user within Sage 200 once you click **OK** or **Apply**.

6. Remove roles.

- Select the roles in the **Selected Roles** list and move them to the **Available Roles** list.
 - Click < if you selected one or more roles.
 - Click << if you selected all roles.

The removal of roles from user accounts takes effect when the user next logs on to Sage 200.

7. The first role that you assign to a user becomes the **Primary Role** for the user.

If you assign more than one role to a user, select the **Primary Role** from the drop down list of assigned roles. The primary role determines what the user's default Sage 200 App environment looks like.

8. Click **OK** to confirm the assigned roles.

Changes to role membership take effect when the user next logs on to Sage 200.

Ensure the users role has the correct features enabled

Users can access features that are enabled in System Administration for their System Administration roles.

A role must be authorised for the feature, *System Administration Services*, in order for the user to be able to access the Sage 200 App.

1. From the Navigation bar, choose **Roles**.
2. Select a **Role Name**.
3. Right click and select **Features**. The **Authorise Features For Role** window appears.
4. Select the **Features** that you want to authorise for the role, including *System Administration Services* within the **System Administration** folder.

Selecting *System Administration Services* does not give a user access to Sage 200 Online Administration, but does give a user access to the Sage 200 App.

Give users access to companies

1. From the Navigation bar, choose **Users**.
2. Select a **User Name**.
3. Click **OK**. The **User properties** window appears.
4. Select the **Company Access** tab.
5. Assign companies.
 - To assign all companies:
 - Select **Access All Companies**.
 - This assigns all companies created to the user, even those that are created after this point.
 - To assign one or more companies:
 - Select the companies you want to assign from the **Available Companies** list.
 - Click **>** to move the company to the **Selected Companies** list.
6. Remove companies.
 - Select the companies in the **Selected Companies** list and move them to the **Available Companies** list.
 - Click **<** if you selected one or more companies.
 - Click **<<** if you selected all companies.

A warning is displayed if you remove all companies assigned to the user.
7. Click **OK** to confirm the companies assigned.

Manage sites

You can view sites you are responsible for, including the site details (audit events, alerts and so on).

You can perform site operations, such as backing up sites (for more information, see [Manage backups on page 53](#)). Partners have administration access to your site all the time but you can set a flag which shows this, or clear the flag if you want.

To view sites

You can view all sites you are responsible for.

 **Open: Dashboards > Sites.**

The Site Dashboard is displayed automatically when you sign in to Sage ERP Online Services.










All the sites you are responsible for are displayed.

You can see colour coding for the site **Health**.

Green	Healthy
Amber	Alerts or Availability problems
Red	Not available

You can see the product and version that is installed on the site.

You can see the site **Status**, for example, whether the site is *Ready* (live), Pending Acceptance, Suspended, and so on.

- Select  to list sites sorted by their **Name**.
- Use search to find a specific site, by clicking the search icon  and entering the site name in the text box that appears above the icon.
- Drill down to the site detail view by clicking the site name.
- View **Audit** , **Availability** , **Performance** , **Alerts** , **Notifications**  and **Processes**  for each site by clicking the more information icon  and selecting the appropriate icon in the display that appears.

You can also view a list of all audits by selecting **Management > Audits**.

All audits are shown. You can filter the view by entering:

- **Since** date and time.
- **To** date and time.
- **Scope**, for example, *Customer*.
- **Item**, for example, *Database*.

- **Action**, for example, *Create*, **Lock** or *Unlock*.
- **Text** keywords, for example, *Login*.

To view site details

 **Open: Dashboard > Site Dashboard.**

- Click the site **Name**.


The site details are displayed in sections:

Header

This section identifies the site customer and contact details, the type of site, its status, and the product and product version.

There are shortcut icons to find out more information for the site (audit, performance, availability, alerts, notifications, processes).

Site Monitoring

A graph of the last day's availability is displayed. You can refresh this by clicking the refresh icon .

Databases

Site databases are listed along with information about their size.

Actions that can be performed on the databases are listed.




You can backup  databases from here.

Users

Site users are listed with values for each user on the site:

Name, Email, Role and Status.

Actions that can be performed on the users are listed.

- You can lock  and unlock  and delete  users from here.
- You can assign users to the site, by clicking **Assign User**.
 - Select the **User**.
 - Select the **Role**.
 - Click **Save**.

Modules

The modules that are available and the number of allowed users is listed.

To monitor usage for a site

 **Open: Dashboards > Sites.**

1. Select the site **Name**.
2. Expand the **Site Monitoring** section to view a graph of the site **Availability** for the last day.

To use flags for partner administration access to your site

Partners have administration access to your site all the time. If you want you can set a flag that shows this.

To set the flag:



Open: Dashboards > Sites.

1. Select the site **Name**.
2. Click **Enable administration site**.
3. Click **Yes** at the prompt to confirm.

To clear the flag:



Open: Dashboards > Sites.

1. Select the site **Name**.
2. Click **Disable administration site**.
3. Click **Yes** at the prompt to confirm.

Manage backups

You can back up data from within Sage ERP Online Services in bacpac files. These files are stored in a location in Blob Storage:

```
[BLOB STORAGE ROOT]/[site id]/backups/
```

Beneath this is:

- A *custom* area which holds bacpacs that have been uploaded (for example, *Demo* data or migrated on premise data).
- A folder for each database, which contains a *rolling* and a *kept* folder.
 - The *rolling* folder where automatic rolling backups are stored.

Days	Daily for seven days. At the end of seven days, the cycle is repeated in sequence. You always have access to the last seven days of backups.
Months	Each month. At the next month the monthly backup is replaced with the current month.
Years	Each year. At the end of each year, the yearly backup is replaced with the current year.

If there is a rolling backup that you want to keep, you can select to keep the backup and move it from the *rolling* to the *kept* folder for the database. Alternatively, you can download the bacpac and store it locally.

- The *kept* folder is where manual backups are stored. You can store up to five backups of each company database at any one time. If you want to store more than this number, you can download and store the backups locally.

If you trigger a site backup, this is the same as individually backing up each database on the site and a new **kept** backup is created for each database with the new timestamp.

The option, **Add Bacpac**, allows you to add company databases from externally produced bacpacs, for example *Demo* data or migrated on premise data.


Back up all databases on a site

 **Open:** Dashboard > Site Dashboard.

1. Select the site **Name**.
2. Select **Backup site**.
3. Click **Yes** to confirm that you want to back up the site.

Back up an individual company database

 **Open:** Dashboards > Site Dashboard.

1. Select the site **Name**.
2. Alongside the database **Name**, select the **Backup** icon .
3. Click **Yes** to confirm that you want to back up the database.

Add Bacpac

A bacpac stores information about server level objects in the database schema - tables, views, instance objects and so on - as well as the data that is held inside the database.

If you have company data that has been created on a local SQL Server and you want to add this data to the Windows Azure Server, you must create a bacpac from the local SQL Server data set. Then use the method described here to upload a bacpac to the site.

 **Open:** Dashboard > Site Dashboard.

1. Select the site **Name**.
2. Click **Add Bacpac**.
3. Click **Upload a file**.
4. Browse to the bacpac file to upload and click **Open**.
5. Click **Save**.

Now that the bacpac has been uploaded, you can create a company for the site in Sage 200 Online Administration app, using the [Add company from bacpac option](#).

Set up, access and view subscriptions

Subscriptions are set up when the site is set up.

Only when the partner or customer accepts the subscription via email is the site provisioned and activated.

Subscriptions are created in Zuora.

View terms and conditions of your subscription

You can view the current and historical terms and conditions of your subscription in Sage ERP Online Services through the **Management** menu.



Open: Sage ERP Online Services > **Management** > **Terms & Conditions**.

- Select the **Product**.

The current terms and conditions are displayed.

- To view historical terms and conditions, click **Historical** and select the terms and conditions version that you want to view.

Sage 200 Online Glossary of Terms

A

Administration

This is equivalent to the Sage 200 System Administration Client in Sage 200 on premise deployments.



Administrator

This is an administrator user of Sage ERP Online Services. There are Customer, Partner, Sage Operations and Sage Management Services Administrators.



Azure

See Windows Azure.



B

Back Office Systems

Secure systems for processing data, behind the scenes. This is often used when referring to Billing systems, CRMs and ERPs.



Bacpac

This is a file type that contains a database schema and data. It is used to copy databases between applications.



Blob Storage

This is Binary Large Object storage area in the Microsoft Azure environment.



C

Captcha

This is an acronym for Completely Automated Public Turing test to tell Computers and Humans Apart. It is usually presented as an image of letters and numbers for you to type into a box because a human can do this while a computer cannot. The program knows that a human is behind the interaction if the numbers and letters are entered correctly in the box.

ClickOnce

Click a link on the internet, such as a URL, to install an application locally. This is a specific Microsoft technology.

Cloning Product Instances

Create a copy of an instance, for example, a staging version of a product instance, including hosted services, SQL Azure instances and data in blob storage.

Cloud Computing

This is the use of computing resources (hardware and software) that are delivered as a service over the Internet.

Cloud Deployed

An application or service that is operated locally by accessing shared computer server resources on the internet.

Compute

This term is used in cloud computing for the processing power of a software application.

Customer Administrator

This is an administrator user within the customer's organisation.

Customer Operations Agent

This is a customer user who operates and manages users, versions and site credentials.

D

Data Center

The data center is the physical location of the servers which hold the data and do the computation.

Deprovision

Remove services that are no longer needed.

Disaster Recovery

Reprovision one or many sites in a data center.

E

ELSM

ELSM is an abbreviation for the European Live Services Management Team.

Entitlement Mechanism

The means by which access is given to feature sets within product instances.

Estate of Product Instances

This is a view of all product instances, visible to Azure administrators.

G

Go-Live

Switch on a service for a user.

H

High Availability Service

A high availability service is one which is required to be available because other systems depend upon its being present.

I

Incident Management Procedure

This is a procedure for managing incidents which cause a loss of service availability. The European Live Services Management Team (ELSM) manager is accountable for incident management. Any incident which does not cause a loss of service availability will be managed by the usual Technical Support ticketing procedures.

Instance

This is one of something. This might be one product, one user, one version, one role, and so on.

M

Management Services

These are the services that allow you to perform actions online in product instance maintenance (creating, amending, provisioning, recycling, deleting) and in contract maintenance, such as billing and licensing.

O

Online Services

These are services that are managed by Sage on behalf of partners and customers, for example, Sage 200 Online.

Operations Administrator

An administrative user who is responsible for operational management of the management services, for example, disaster recovery, making product updates available, ensuring availability and performance.

Operations Agent

This is a non-administrative user who can perform a subset of tasks in Sage ERP Online Services.

P

Partner

This is a Sage Business Partner.

Partner Administrator

This is an administrator user with the channel partner organisation who performs billing and back office activities.

Partner Operations Agent

This is a channel partner employee who performs operational tasks for a customer. For example, creating a backup or creating a site.

Partner Support Agent

This is a channel partner employee who performs support activities for a customer. This user will have a high level of IT expertise and experience of on premise deployments on customer sites. For example, reviewing a log or answering queries about billing.

Product Instance

A product instance is a single instance of a product, for example, Sage 200. A customer may have many product instances of the same product type, or many instances of different product types.

Provision

Create a new product instance and its associated subscription.

R**Resume**

Recreate the required hosted services for a suspended running product instance.

S**Sage 200 App**

This is equivalent to the Sage 200 Desktop client in Sage 200 on premise deployments.

Sage 200 Web Client

This is equivalent to Sage 200 Self Service in on premise deployments.

Sage ERP Online Services (SEOS)

The interface or mechanism, through which management services are accessed and sites provisioned is called Sage ERP Online Services. Sage Operating Companies and Partners can set all information to provision cloud applications using this mechanism.

Sage ID

This is the group-wide authentication provider for Sage online applications.

Sage Operations Administrator

This is an administrator user at Sage, managing day to day operations of the online services, including deploying version upgrades or patches, coping with disaster scenarios and monitoring the performance of the online services infrastructure.

Sage Operations Agent

This is a Sage user fulfilling a particular Sage role in using the portal, for example, BP Support, Technical Support.

Scale Up

Allow increased compute or storage requirements temporarily or permanently.

SEOS

Acronym for Sage ERP Online Services.

Shelve

Archive SQL Azure data to blob storage to avoid consuming Azure resources (which have a cost), if no longer needed.

Smart Client

A smart client is a responsive local user interface on a user's PC, which works across the Internet with a remote server, giving the appearance of a locally installed application.

Subscription

A subscription grants you access to all of the Sage online services items that you are paying to use.

Support Agent

This is an employee with Sage or with a channel partner, offering support. For example, in Sage this is technical support, development support or BP Services. In channel partners, this might be customer support, technical support or account services.

Suspend

Stop the running hosted services.

T

Terms and Conditions

Subscriptions have associated terms and conditions rather than end user licence agreements.

U

Unshelve

Retrieve archived SQL Azure data from blob storage, for example, what was shelved previously, or restore what was backed up before.

URI

URI is an abbreviation for Uniform Resource Identifier. This is a string of characters which identifies a resource on the Internet.

URL

URL is an abbreviation for Uniform Resource Location. This is a string of characters which identifies the location of a URI.

UUID

UUID is an abbreviation for Universal Unique IDentifier. This is used to uniquely identify an object on the Internet.

W

Web Client

An application user interface accessed in a web browser, operating across the internet with a remote server.

Windows Azure

Windows Azure is a Microsoft cloud service for hosting computer applications and providing software as a service.

Z

Zuora

This is a third party billing service, used to bill Sage subscription services. See www.zuora.com.
