The Deployment and Installation Guide

for the Sage 200 Suite v2010

sage

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Contents

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Introduction

This guide is designed to provide Sage 200 Business Partners and customers with all the information required to install and upgrade the Sage 200 Suite v2010.

Please make sure that you read the relevant sections in this guide before you install or upgrade the Sage 200 Suite v2010.

You must read the following sections:

- System requirements and prerequisites on page 3
- How to deploy Sage 200 across a network on page 13

  This section provides advice on how to deploy the Sage 200 Suite in a variety of network environments.
- Installing the Sage 200 Suite for the first time on page 39

  This gives you step-by-step instructions on how to install Sage 200. This includes detailed information on how to install:
  - Sage 200 Financials, Commercials, Project Accounting and Bill of Materials modules.
  - Sage 200 Manufacturing.
  - Sage 200 Business Intelligence.

The other key areas covered in this guide are:

- Setting up and configuring the various modules of the Sage 200 Suite prior to entering transactions. This includes step by step instructions for setting up the Sage 200 System Administration tool, and a brief guide to setting up the various Sage 200 modules.
- Instructions for installing and setting up Sage 200 CRM.

- Instructions for upgrading an existing installation of the Sage 200 Suite. This includes detailed information on upgrading:
    - Sage 200 Financials, Commercials and Project Accounting modules.
    - Sage 200 Manufacturing.
    - Sage 200 Business Intelligence.
    - Sage 200 CRM.

Required Knowledge

To install or upgrade the Sage 200 Suite you must have experience in:

- Configuring SQL Server 2005/2008.
- Configuring Microsoft Internet Information Services (IIS)

Note:
This Deployment and Installation Guide for the Sage 200 Suite v2010 replaces the following guides available with previous versions of the Sage 200 Suite:

- Sage 200 System Requirements
- Sage 200 Implementation Guide
- Sage 200 Business Intelligence Installation and Best Practice Guide
- Sage 200 Manufacturing Getting Started Guide
- Sage 200 CRM Upgrade Guide
- Sage 200 CRM Integration Upgrade Guide
- Sage 200 CRM Integration Configuration Guide

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System requirements and prerequisites

The Sage 200 Suite is a modular system made up of the Sage 200 core components and optional market-specific vertical modules that integrate with the core product. When determining your system requirements, you must make sure that you have considered the requirements for the Sage 200 core components and each of the optional Sage 200 modules that you want to use, as different modules have different system requirements.

Supported operating systems – core modules

Sage 200 Core Modules	Windows XP Professional (32-bit only)	Windows Vista (32-bit only) (Business & Ultimate Editions)	Windows 7 (32-bit and 64-bit) (Professional, Enterprise & Ultimate Editions)	Windows Server 2003 (32-bit and 64-bit).Standard & Enterprise Editions, 2003 & 2003 R2	Windows 2003 Small Business Server (Standard & Premium Editions)	Windows Server 2008 (32-bit and 64-bit). Standard & Enterprise Editions, 2008 and 2008 R2	Windows 2008 Small Business Server (Standard & Premium Editions)
Sage 200 Core Components							
Sage 200 File Server	✗[1]	✗	✗[1]	✓	✓	✓	✓
Sage 200 Application Services	✗[1]	✗	✗[1]	✓	✓	✓	✓
Sage 200 Remote Authorisation	✗[1]	✗	✗[1]	✓	✓	✓	✓
Sage 200 Financials Client	✓	✓	✓	✓	✓	✓	✓
Sage 200 CRM							
Sage 200 CRM Server	✗[1]	✗	✗[1]	✓	✓[2]	✓	✓[2]
Sage 200 CRM Client	✓	✓	✓	✓	✓	✓	✓
Sage 200 Business Intelligence[3]							
Sage 200 Business Intelligence Server	✗[1]	✗	✗[1]	✓	✗[4]	✓	✗[4]
Sage 200 Business Intelligence Client (including Sage 200 BI Admin Tool)	✓	✓	✓	✓	✗[4]	✓	✗[4]
Sage 200 Business Intelligence Excel Client	✓	✓	✓	✓	✗[4]	✓	✗[4]

1 Operating System not supported for production environments but may be used for demonstration and training purposes only

2 The Sage 200 CRM Exchange Synchronisation feature is not supported.

3 Sage 200 Business Intelligence requires Analysis Services, which is included with Microsoft SQL Server 2005 Standard Edition and Microsoft SQL Server 2008 Standard Edition (32-bit and 64-bit) and is only supported on these versions of SQL Server. Other editions of Microsoft SQL Server are supported if Sage 200 Business Intelligence is not required.

4 Sage 200 Business Intelligence is not supported when SQL Server is installed on a domain controller. Sage 200 Business Intelligence running on SBS 2003 or SBS 2008 is only supported if Microsoft SQL Server is installed on a machine other than the domain controller.

Supported operating systems – optional modules

Sage 200 Optional Modules	Windows XP Professional (32-bit only)	Windows Vista (32-bit only) (Business & Ultimate Editions)	Windows 7 (32-bit and 64-bit) (Professional, Enterprise & Ultimate Editions)	Windows Server 2003 (32-bit and 64-bit) Standard & Enterprise Editions, 2003 & 2003 R2	Windows 2003 Small Business Server (Standard & Premium Editions)	Windows Server 2008 (32-bit and 64-bit). Standard & Enterprise Editions, 2008 and 2008 R2	Windows 2008 Small Business Server (Standard & Premium Editions)
Sage 200 Commercials							
Sage 200 Commercials Client	✓	✓	✓	✓	✓	✓	✓
Sage 200 Project Accounting							
Sage 200 Project Accounting Client	✓	✓	✓	✓	✓	✓	✓
Sage 200 Manufacturing							
Sage 200 Manufacturing Server	✗[5]	✗	✗[5]	✓	✓	✓	✓
Sage 200 Manufacturing Client	✓	✓	✓	✓	✓	✓	✓
Sage 200 Wholesale & Retail							
Sage 200 Wholesale & Retail Server	✗[5]	✗	✗[5]	✓	✓	✓	✓
Sage 200 Wholesale & Retail Client	✓	✓	✓	✓	✓	✓	✓
Sage 200 Web Time & Expenses (WTE)							
Sage 200 WTE Server	✗[5]	✗	✗[5]	✓	✓	✓	✓
Sage 200 WTE Client	✓	✓	✓	✓	✓	✓	✓
Sage 200 Integration Server (AIS)	✗[5]	✗	✗[5]	✓	✓	✓	✓
Sage 200 Migration Tool							
Sage 200 Migration Tool	✓	✓	32-bit only	32-bit only	✓	32-bit only	✗
Sage 200 Construction							
Sage 200 Construction	See 'Sage 200 Construction Release Notes' for further details						

5 Operating system not supported for production environments but may be used for demonstration and training purposes only.

Note:

We recommend that you install the latest service packs and Windows Updates for your client and server operating system and your database management system.

With the exception of Microsoft Small Business Server operating systems, the Sage 200 Suite is not supported on a machine that is also acting as a domain controller.

Where supported on 64-bit platforms, the Sage 200 suite is a 32-bit application that runs in WOW64 emulation mode. The Sage 200 suite does not support Itanium chipsets.

Other supported components

Supported Database Systems

Microsoft SQL Server 2005 Workgroup Edition with Service Pack 3
Microsoft SQL Server 2005 Standard Edition with Service Pack 3 (32 and 64-bit editions)
Microsoft SQL Server 2008 Workgroup Edition with Service Pack 1 (32 and 64-bit editions)
Microsoft SQL Server 2008 Standard Edition with Service Pack 1 (32 and 64-bit editions)

Supported Editions of Microsoft Office

Microsoft Office 2003 – Standard, Small Business and Professional Editions
Microsoft Office 2007 – Standard, Small Business, Professional, Ultimate and Enterprise Editions

Supported Editions of Sage Payroll

Sage Payroll v15.04 – Standard, Professional and Bureau Editions
Sage Payroll v16.01 – Standard, Professional, and Bureau Editions

Browser Support

Microsoft Internet Explorer v6 Service Pack 1
Microsoft Internet Explorer v7.x
Microsoft Internet Explorer v8.x

Sage 200 Mobile - Supported Devices

Blackberry Curve (8520, 8900)
Blackberry Bold (9000)

Minimum Supported System Requirements

These are the **minimum** specifications for each of the machine types in a Sage 200 Suite deployment. Users with larger databases or increased numbers of concurrent users will require higher specifications.

Due to the wide variation of companies that use the Sage 200 Suite, it is not possible to give exact specifications for each system. Factors such as the concurrent number of users, size of the database and estimated growth should all be taken into consideration when sizing a server.

When tasks are processed CPU and memory resources are used on both the client and the server. The specification of both machines will affect the overall performance of the system.

If you are planning on running more than 50 concurrent users of the Sage 200 Suite, or expect to process a significant number of transactions, please contact us for specialist advice regarding system specification and deployment. See http://support.sage.co.uk for contact details.

Single Server Deployment

Sage 200 Server	Processor	Disk	Memory	Network	Video
Combined Sage 200 File, Application and Web Server with Microsoft SQL Server	Dual-core 2.6GHz or equivalent	7,200 rpm SATA with 4GB disk space after SQL Server is installed.	4GB	Gigabit Ethernet	1024x768

Sage 200 Client	Processor	Disk	Memory	Network	Video
Client	2.8GHz Pentium 4 or equivalent (e.g. Dual Core 1.6GHz)	7,200 rpm SATA with 500MB disk space required.	2GB	100 mbit Ethernet	1024x768

Split Server Deployment

Split Server Deployment	Processor	Disk	Memory	Network	Video
Sage 200 File Server with Microsoft SQL Server	Dual-core 2.6GHz or equivalent	7,200 rpm SATA with 1GB disk space after SQL Server is installed.	2GB	Gigabit Ethernet	1024x768
Sage 200 Application Server	Dual-core 2.6GHz or equivalent	7,200 rpm SATA with 1GB disk space required.	2GB	Gigabit Ethernet	1024x768
Sage 200 Web Server	3.0GHz Pentium 4 or equivalent (e.g. Dual Core 1.6GHz)	7,200 rpm SATA with 2GB disk space required.	2GB	Gigabit Ethernet	1024x768

Sage 200 Client	Processor	Disk	Memory	Network	Video
Client	2.8GHz Pentium 4 or equivalent (e.g. Dual Core 1.6GHz)	7,200 rpm SATA with 500MB disk space required.	2GB	100 mbit Ethernet	1024x768

Prerequisites for the Sage 200 Suite

Before you install the Sage 200 Suite v2010, you must make sure the required prerequisites are installed on your system. You must also make sure that your installation of Microsoft Internet Information Services (IIS) has the required settings.

Pre-requisites

- Microsoft SQL Server running in Mixed Mode (SQL Server and Windows Authentication mode) with Server Collation set to Latin1, General, Case Insensitive (CI), Accent Sensitive (AS).
- Machines running the Sage 200 Suite must have a physical c:\ drive although the suite can be installed and run from a drive other than c:\.
- Microsoft Internet Information Services (IIS) v5 or greater.

The following components are installed automatically if they are not found on your system:

- Microsoft DotNet Framework v3.5 Service Pack 1
- Microsoft Web Service Enhancements (WSE) v3.0 Runtime
- Microsoft Windows Installer v4.5

Required settings for Microsoft Internet Information Services (IIS)

- IIS v6 must have ASP and ASP.NET.
- IIS v7 and IIS v7.5 must have the following settings:
  - Web Management Tools

    IIS Management Console
  - Web Management Tools > IIS 6 Management Compatibility

    IIS 6 WMI Compatibility

    IIS Metabase and IIS 6 configuration compatibility
  - World Wide Web Services > Application Development Features

    .Net Extensibility

    ASP

    ASP.NET

    ISAPI Extensions

    ISAPI Filters
  - World Wide Web Services > Common HTTP Features

    Default Document

    Directory Browsing

HTTP Errors

HTTP Redirection

Static Content

- World Wide Web Services > Security

Request Filtering

General Considerations

Before you install the Sage 200 Suite, it is important that you decide which modules you require.

You must make sure that your system complies with the Sage 200 system requirements. Different modules have different system requirements, and some modules are dependant on other modules being installed first.

See the System requirements and prerequisites on page 3 for an outline of the system requirements for each module of the suite.

You must also consider the following when designing your system:

- You can only install Sage 200 Web Time and Expenses (WTE) if you have Sage 200 Project Accounting.
- You can run Sage 200 with Manufacturing or Sage 200 with Wholesale and Retail, but not both.
- If you want to use Sage 200 CRM or Sage 200 WTE externally across the Internet, they should be installed on a different machine to the Sage 200 Application Services. For more information, see Deploying Sage 200 on separate file, application and web servers on page 20
- If Sage 200 CRM, WTE or Remote Authorisation is installed to the same website as the Sage 200 Application Services, then it will only be accessible internally. This is because the SSL certificate used by Sage 200 Application Services is based on the machine name and is not externally accessible.

  If you want to access the Sage 200 Remote Authorisation website externally, we recommend that you install Remote Authorisation on a different website that has previously been secured with an externally accessible SSL certificate.
- We do **not** support:
  - Sage 200 CRM Exchange Synchronisation on either SBS 2003 or SBS 2008.
  - Terminal Services on either SBS 2003 or SBS 2008.

    This is due to the Terminal Services Application Mode being disabled in these operating systems. For further information, see the following websites:

    http://technet.microsoft.com/en-us/sbs/cc817589.aspx

    www.m-
    icrosoft.com/canada/smallbiz/products/sbs/terminalservices.mspx

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How to deploy Sage 200 across a network

This chapter provides advice on how the Sage 200 Suite can be deployed across a network.

This chapter provides advice on deploying the Sage 200 Suite in the following scenarios:

- On a single server
- On two servers; separate file and application servers
- On three servers; separate file, application and web servers.

Architecture of the Sage 200 Suite

The Sage 200 Suite is a modular system made up of the Sage 200 core components and optional market-specific vertical modules that integrate with the core product.

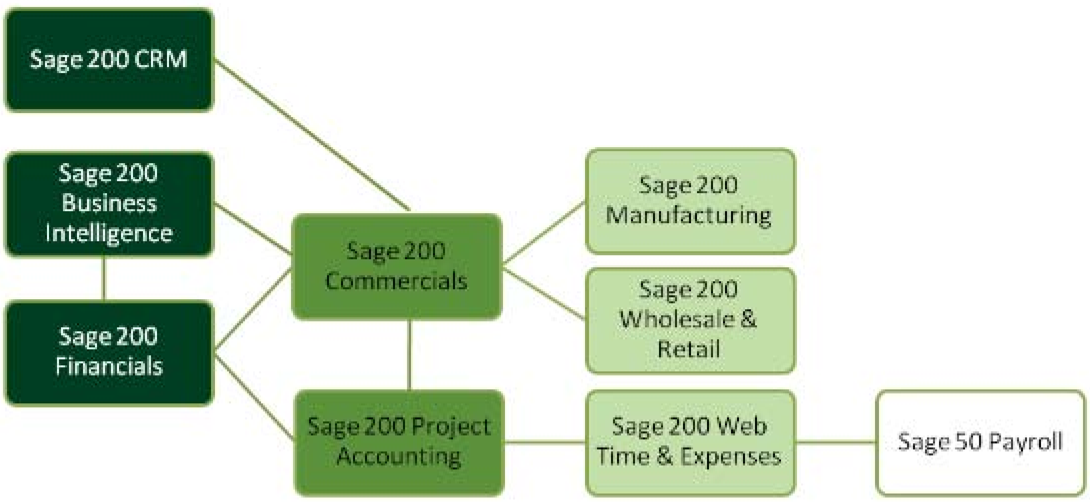
The Sage 200 core modules are:

- Sage 200 Financials
- Sage 200 Business Intelligence
- Sage 200 CRM

The following additional modules can be added:

- Sage 200 Commercials
- Sage 200 Project Accounting
- Sage 200 Bill of Materials
- Sage 200 Manufacturing
- Sage 200 Wholesale and Retail
- Sage 200 Web Time and Expenses (WTE)
- Sage Payroll

The following diagram shows the links between modules and highlights how they integrate.



The Sage 200 Suite is built upon the Microsoft DotNet framework. Microsoft SQL Server is used as a back-end relational database server. The Sage 200 Suite is primarily designed to work in a local area network environment with a SQL server to store the system databases.

The application footprint on each of the Sage 200 client machines can be large. Each of the client machines that run Sage 200, as well as the servers, must meet the minimum specification. See Minimum Supported System Requirements on page 7.

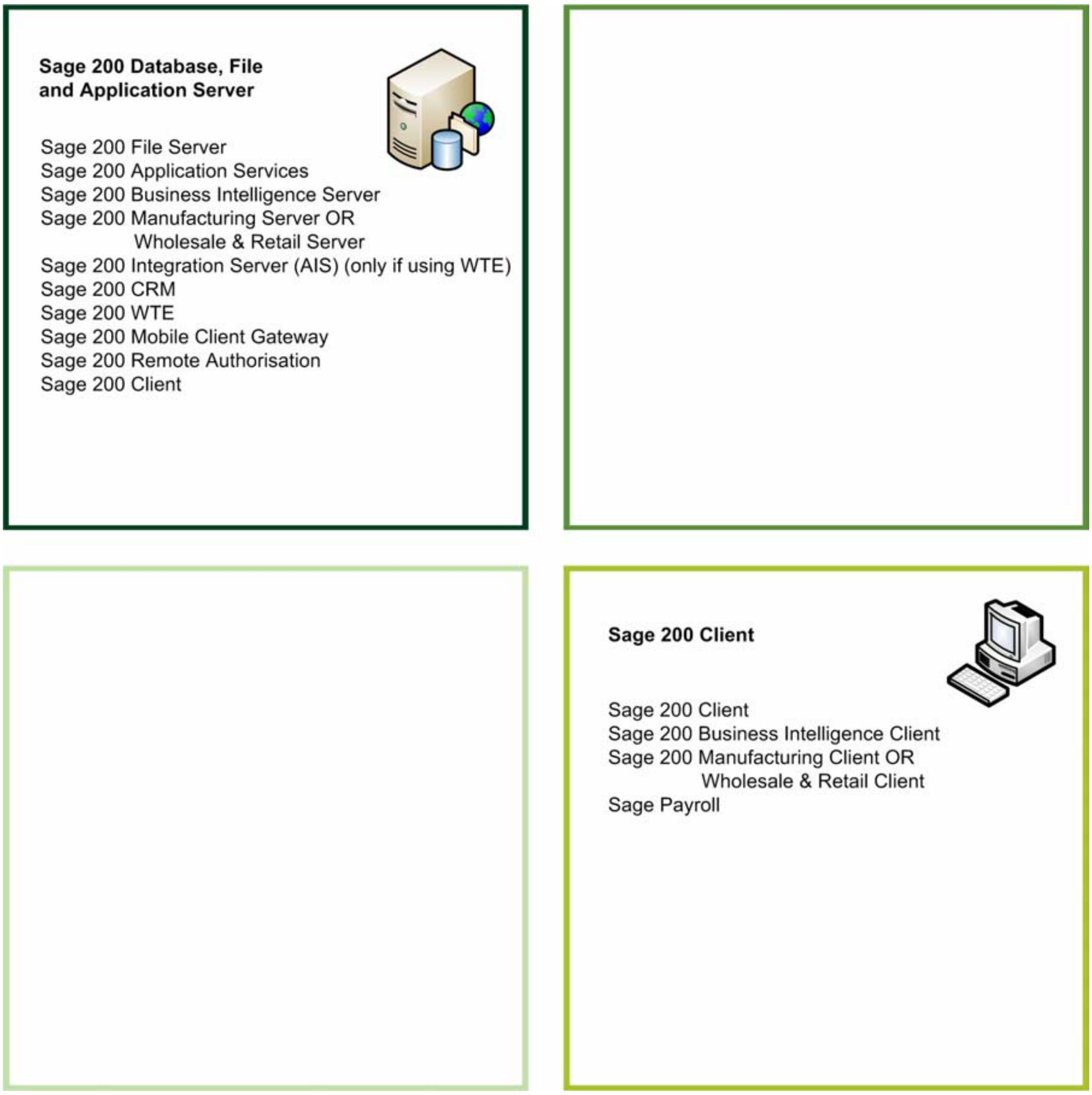
Deploying Sage 200 on a single server

In this scenario, all the server elements of the Sage 200 Suite are installed on a single server, along with Microsoft SQL Server.

The Sage 200 Client, along with the client components of the additional modules, are installed on the client machines. For more information see How to install the Sage 200 client across your network on page 46.

We recommend that you install Sage 200 on a single server for smaller sites. These sites should have a database size of less than 4GB, and less than 12 concurrent users.

When the Sage 200 Suite is installed on a single server, the components of the Sage 200 Suite are distributed as follows:



Recommendations for installing Sage 200 on a single server

- Unless you are using Microsoft Small Business Server, we recommend that when Sage 200 is installed on a single server, that the Sage 200 Suite is **not** installed on a machine that is also acting as a domain controller.
- We recommend that you do **not** install Sage 200 on a single server if you want to use Sage 200 CRM, Sage 200 WTE, or Sage 200 Remote Authorisation externally over the Internet.

  In this case, we recommend that you install Sage 200 on more than one server where internal web services and SQL server can be protected behind a firewall.
- For security reasons, we recommend that Sage 200 CRM and Sage 200 WTE are not exposed externally when installed on a single server.

  If you want to access Sage 200 CRM or Sage 200 WTE over an external Internet connection, we recommend that the Sage 200 Suite is installed on separate file and application servers.

  For more information see Deploying Sage 200 on separate file and application servers on page 18.
- If you install Remote Authorisation on the same website as the Sage 200 Application Services, then it will only be accessible internally. The SSL certificate used by Sage 200 Application Services is based on the machine name and is not externally accessible.

  If you want to access the Sage 200 Remote Authorisation website externally, we recommend that you install Remote Authorisation on a different website that has previously been secured with an externally accessible SSL certificate.
- You can use a local computer account (NETWORK SERVICE) to run the Sage 200 web services. This saves you having to create another windows account to run the Sage 200 Web Services.

Deploying Sage 200 on separate file and application servers

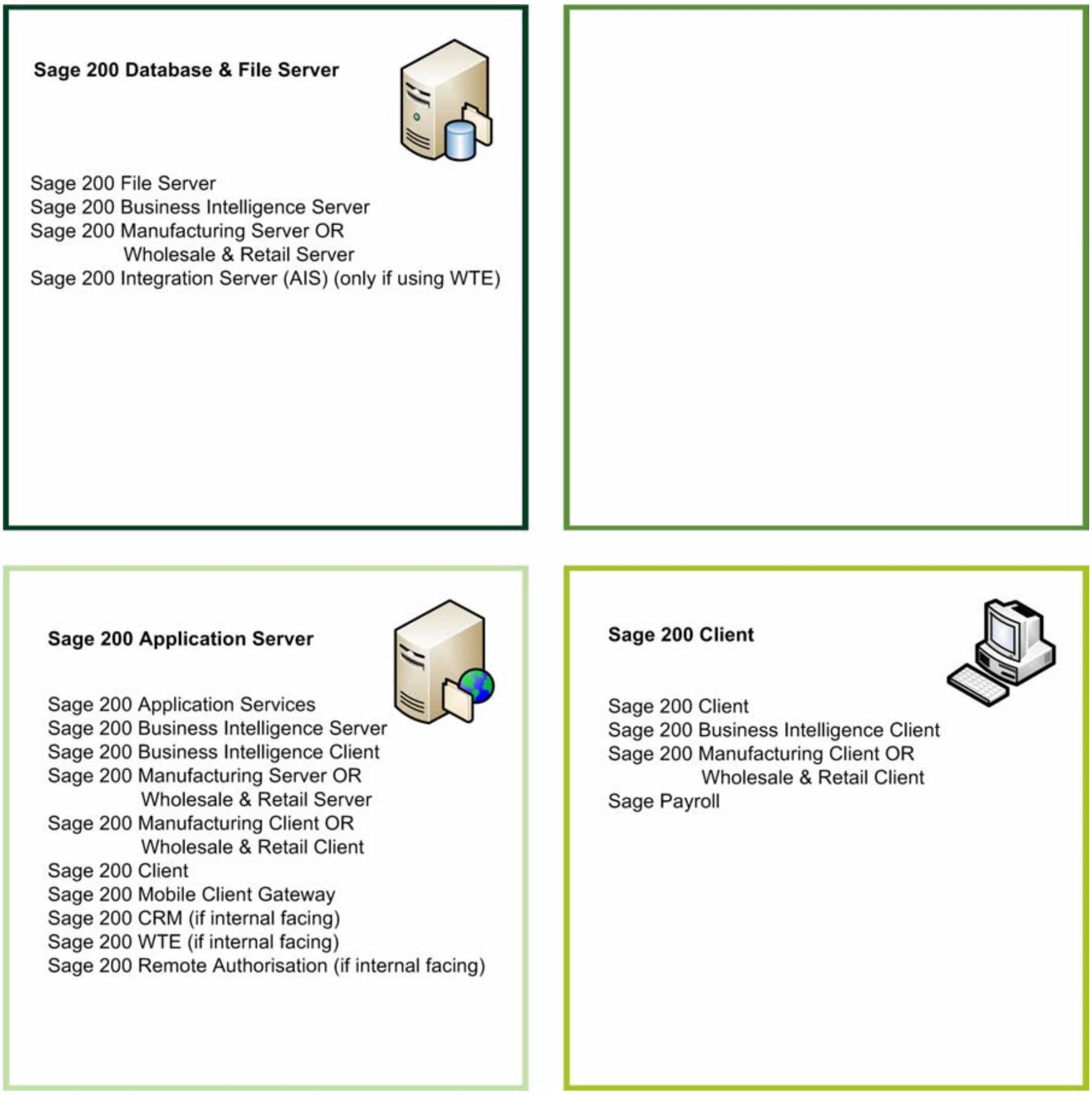
In this scenario, the Sage 200 File Server, along with the file server components of any of the additional modules, are installed on a single server alongside Microsoft SQL Server.

Any web elements of the Sage 200 Suite are installed on a second server.

The Sage 200 Client, along with the client components of the additional modules, are installed on the client machines. For more information see How to install the Sage 200 client across your network on page 46.

We recommend that you deploy Sage 200 on separate file and application servers in larger sites where greater numbers of users are running Sage 200 Accounts and/or Sage 200 CRM concurrently. For example, where you have 20 Sage 200 Accounts users and 30 Sage 200 CRM users.

When Sage 200 is installed on separate file and application servers, the various components of the Sage 200 Suite are distributed as follows:



Requirements for installing Sage 200 on separate file and application servers

- If you are installing Sage 200 Business Intelligence, Sage 200 Manufacturing, or Sage 200 Wholesale and Retail on separate servers , you **must** install the modules on both the Sage 200 File Server, and the Sage 200 Application Server.
- You **must** use a specific domain account or group to run the Sage 200 Web Services. You cannot use a local computer account.

Deploying Sage 200 on separate file, application and web servers

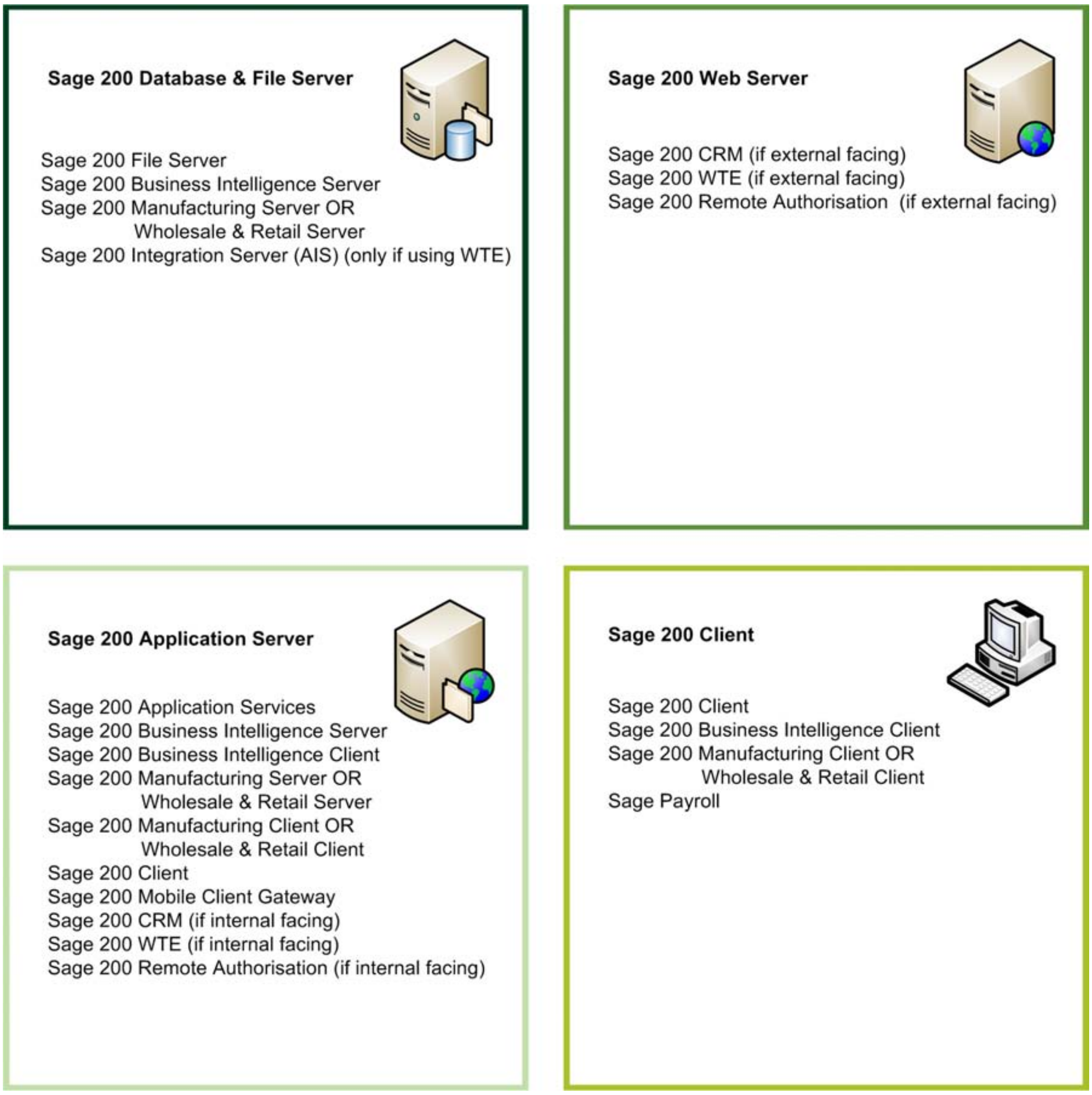
In this scenario, the Sage 200 File Server, along with the file server components of any of the additional modules, are installed on a single server alongside Microsoft SQL Server.

The Sage 200 Application Services is installed on a second application server, along with the application server components for the additional modules. The Sage 200 web-based modules that you want to deploy internally are also installed on this second application server. These are Sage 200 CRM, Sage 200 WTE, Sage 200 Remote Authorisation.

You use a third web server for any of the Sage 200 web based modules (Sage 200 CRM, Sage 200 WTE, Sage 200 Remote Authorisation) that you want to access externally.

We recommend that you use separate file, application and web servers for larger sites where you want to deploy the web based elements of the Sage 200 Suite (Sage 200 CRM, Sage 200 WTE and Sage 200 Remote Authorisation) internally and externally. These are physically protected by separating elements out behind firewalls, or within DMZ

When Sage 200 is installed on separate file, application and web servers, the various components of the Sage 200 Suite are distributed as follows:



Requirements for installing Sage 200 on separate file, application and web servers

- When Sage 200 CRM and Sage 200 WTE are installed on a separate web server, they **must** be installed to a website that has previously been secured with an externally accessible SSL certificate.
- If you are installing Sage 200 Business Intelligence, Sage 200 Manufacturing, or Sage 200 Wholesale and Retail on separate servers , you **must** install the modules on both the Sage 200 File Server, and the Sage 200 Application Server.
- You **must** use a specific domain account or group to run the Sage 200 Web Services. You cannot use a local computer account.

Installing Sage 200 in a 64 bit environment including Small Business Server v2008

The Sage 200 Suite is a 32-bit application which is supported on 64-bit operating systems.

The web service elements of the suite must run in a 32-bit instance of Internet Information Services (IIS). On 64-bit operating systems IIS runs in 64-bit mode by default.

To use the Sage 200 Suite in a 64 bit environment and on Microsoft Small Business Server 2008, you must set IIS to run as 32 bit.

Windows Server 2008 uses IIS v7 which can run in 32-bit AND 64-bit mode concurrently. When you install the Sage 200 Suite, the application pool for the website you choose to install the Sage 200 Application Services into will be set to allow 32-bit applications.

Warning

Other applications and websites running within IIS on the same server will run in 32-bit mode after installing the Sage 200 Suite. You must ensure that these applications function correctly, or move them to a separate web server.

Allowing 32-bit applications to run within an application pool that also hosts 64-bit applications may cause compatibility issues. Make sure you follow the required additional installation steps detailed in this section.

If you install Sage 200 on a single Microsoft Small Business Server, you must consider the number of other services running on the server. Any installation of Sage 200 on a single Microsoft Small Business Server should be restricted to low user counts (6 – 8 users) and to small to medium size databases (~2GB). This is to make sure that performance is acceptable. To increase performance and for higher user counts and database sizes, use a separate SQL server joined to the same domain.

There are additional installation steps depending on the type of server you are installing on.

- To install on Small Business Server 2008, you must:
    a. Follow the instructions for installing on Small Business Server v2008.
    b. Edit the configuration files.
    c. Convert the Sage200Content virtual directory to an application.
    d. Edit the applicationHost.config file.
    e. Turn off HTTP compression.

   f. If required, follow the post installation steps for Sage 200 CRM.
   g. If required, follow the post installation steps for Sage 200 WTE.

- To install on a 64 bit server with your own SSL certificate, you must:
   a. Edit the configuration files.
   b. Convert the Sage200Content virtual directory to an application.
   c. Edit the applicationHost.config file.
   d. Turn off HTTP compression.
   e. If required, follow the post installation steps for Sage 200 CRM.
   f. If required, follow the post installation steps for Sage 200 WTE.
- To install on a 64 bit server with Microsoft Exchange 2007 or with Microsoft Windows Server 2008 Terminal Services Gateway, you must:
   a. Edit the applicationHost.config file.
   b. Convert the Sage200Content virtual directory to an application.
   c. Turn off HTTP compression.
   d. If required, follow the post installation steps for Sage 200 CRM.
   e. If required, follow the post installation steps for Sage 200 WTE.

Install the Sage 200 Suite on Microsoft Small Business Server 2008

Microsoft Small Business Server 2008 (SBS2008) is a 64-bit operating system.

If you install Sage 200 on a Small Business Server, you can only install the Sage 200 web services and applications internally. For example, over a company intranet. This applies to:

- Sage 200 System Administration
- Sage 200 CRM
- Sage 200 WTE
- Sage 200 Remote Authorisation

This restriction is for security purposes and prevents you from inadvertently exposing your domain controller to external access.

Note: We support Sage 200 Business Intelligence on a Microsoft Small Business Server only when Microsoft SQL Server is installed on a machine other than the domain controller.

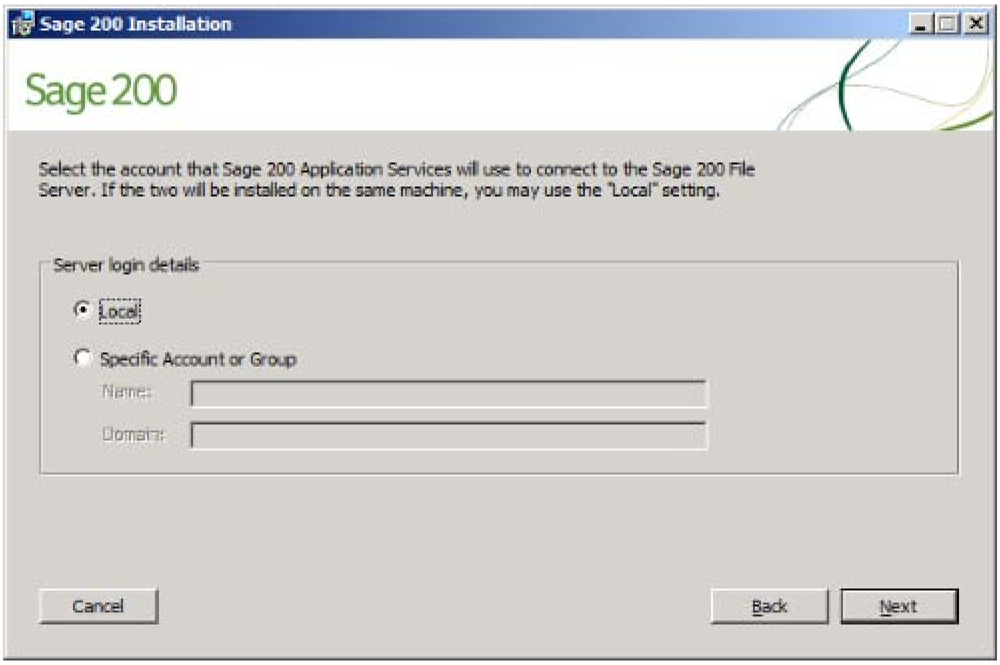
Microsoft Small Business Server comes with it's own SSL certificates.

You must follow the additional installation instructions to make sure your system is configured correctly.

1. From the Sage 200 Suite DVD, select the setup.exe file for the Sage 200 Suite.
2. Right-click and choose Run as administrator.

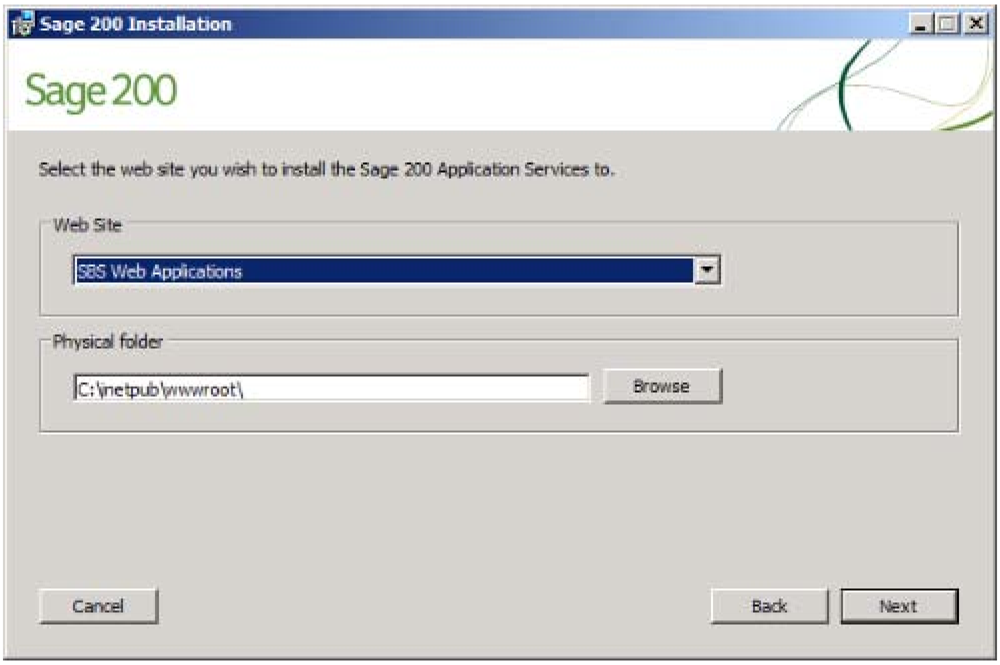
   Note: Due to the elevated security of SBS2008, you must run the setup.exe with elevated privileges.

3. A A program needs your permission to continue message appears. Click Continue.
4. Follow the steps in the installation wizard until the Server Login Details screen appears.



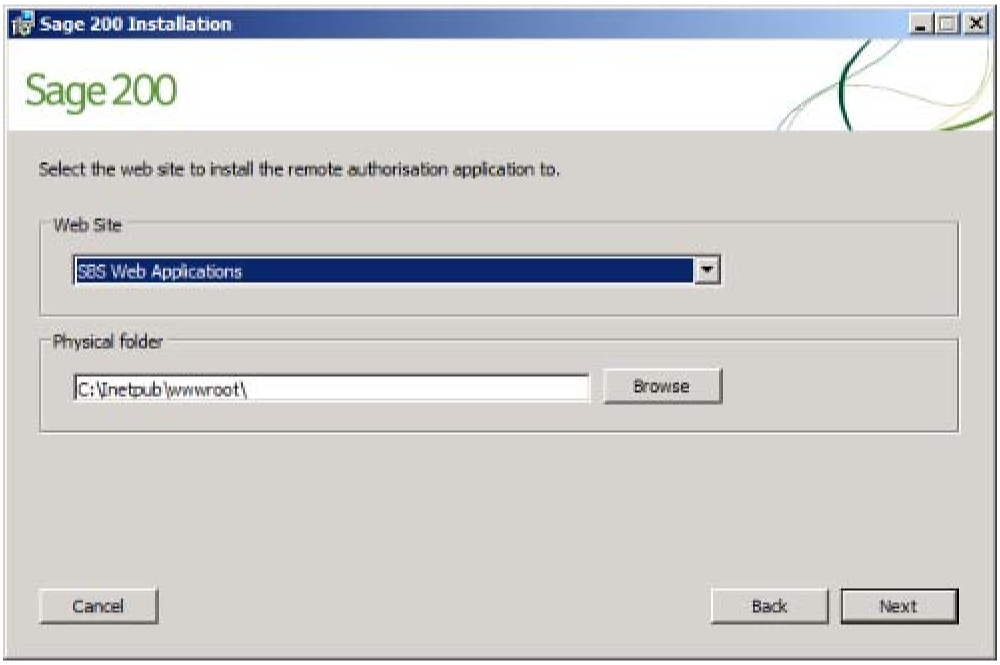
5. You **must** select Local.

   Click Next to continue. The Sage 200 Application Services Website screen appears.

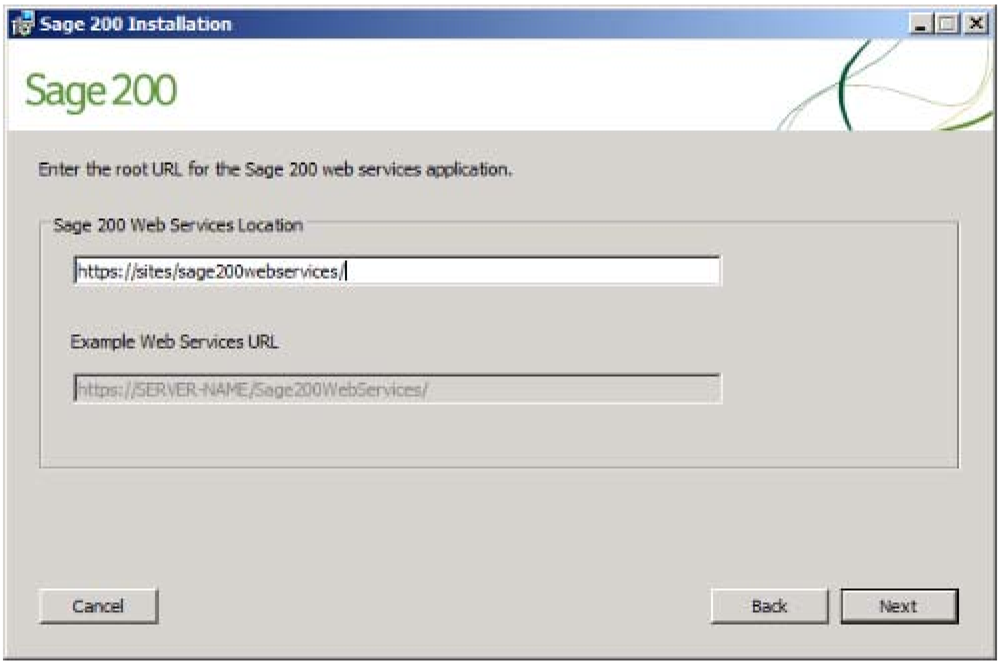


6. You **must** select the SBS Web Applications website from the drop-down list.

   If you have chosen to install Remote Authorisation, the Remote Authorisation Website screen appears.



7. You **must** select the SBS Web Applications website from the drop-down list. Click Next to continue. The Sage 200 Web Services screen appears.



8. You **must** enter the URL https://sites/sage200webservices/

Note: SBS 2008 is pre-configured with application pools and websites bound to the default TCP ports 80 and 443. It uses SSL certificates to secure these ports. To prevent issues with business services such as Microsoft Exchange, SBS comes with a dedicated site called SBS Web Applications. This is designed to host web-based applications that you want to run on your SBS server. Any applications that run from this site have the host header https://sites.

Complete the rest of the installation wizard as per a standard installation.

Edit the configuration files

Follow these steps if you are installing the Sage 200 Suite:

- On Microsoft Small Business Server 2008.
- On a 64 bit server with your own SSL certificate.

The Sage 200 Web Services uses the host header rather than the machine name to access resources.

1. Choose Start > All Programs > Notepad.exe.
2. Right-click and select Run as Administrator. Use Notepad to open the following files:
3. c:\Sage\Logon\Configuration.xml.

a. Amend the following path:

<AdminWebService value="https://***<your machine_***
name>/Sage200Administration/Sage200AdminService.asmx"
/>

To read:

<AdminWebService
value="https://
sites/Sage200Administration/Sage200AdminService.asmx
/>

b. Amend the following path:

<ClientWebService Value="https://***<your machine_***
name>/Sage200Administration/Sage200SAAService.asmx"
/>

To read:

<ClientWebService
Value="https://
sites/Sage200Administration/Sage200SAAService.asmx"
/>.

c. Save the file.

4. c:\Sage\Logon\SAAServiceSettings.xml.

   a. Amend the following path:

   <SAAServiceSettings Url="https://***<your machine_***
   name>/Sage200Administration/Sage200SAAService.asmx"
   />

   To read:

   <SAAServiceSettings
   Url="https://
   sites/Sage200Administration/Sage200SAAService.asmx"
   />

   b. Save the file.

5. c:\Program Files (x86)\Sage\Sage200\mmc.exe.config.

   a. Amend the following path:

   <setting name="Sage_MMSAdmin_Kernel_WebService_
   Service" serializeAs="String">

```
<value>https://<your machine_
name>
/Sage200Administration/Sage200AdminService.asmx</value>
```

To read:

```
<setting name="Sage_MMSAdmin_Kernel_WebService_
Service" serializeAs="String">
<value>https://
sites
/Sage200Administration/Sage200AdminService.asmx</value>
```

b. Save the file.

Amend this file on each client machine that will run the Sage 200 client.

6. c:\Program Files (x86)\Sage\Sage200\mmc.exe.config.

a. Amend the following path:

```
<setting name="Sage_MMSAdmin_Kernel_WebService_
Service" serializeAs="String">
<value>https://<your machine_
name>
/Sage200Administration/Sage200AdminService.asmx</value>
```

To read:

```
<setting name="Sage_MMSAdmin_Kernel_WebService_
Service" serializeAs="String">
<value>https://
sites
/Sage200Administration/Sage200AdminService.asmx</value>
```

b. Save the file.

Amend this file on each client machine that will run the Sage 200 client.

Convert the Sage200Content virtual directory to an application

Follow these steps if you are installing the Sage 200 Suite on:

- Microsoft Small Business Server 2008.
- A 64 bit server with your own SSL certificate.

1. Open IIS Manager and open the list of websites.
2. Select the SBS Web Applications website.
3. Right-click the Sage200Content folder. Choose Convert to Application from the drop down list.
4. Choose Select.

5. Select the Sage200 application pool from the drop-down list.
6. Click OK twice then close IIS Manager.

Edit the applicationHost.config file

Follow these steps if you are installing the Sage 200 Suite on:

- Microsoft Small Business Server 2008.
- A 64 bit server with your own SSL certificate.
- A 64 bit server with Microsoft Exchange 2007 or with Microsoft Windows Server 2008 Terminal Services Gateway.

The applicationHost.config file contains all of the configuration information for IIS. Some editing of this file is required.

> **Warning**
>
> You must make a backup copy of this file before continuing, as incorrectly editing this file can result in IIS failures.

1. Choose Start > All Programs > Notepad.exe.
2. Right-click and select Run as Administrator.
3. Use Windows Notepad to open the file :

   C:\Windows\System32\inetsrv\config\applicationHost.config.

   Note: If you cannot see this file, change the File type to All Files.

4. The 64-bit version of the Password Expiry Module installed by Microsoft Windows Server 2008 Terminal Services Gateway and Microsoft Exchange 2007 is incompatible with 32-bit application pools. To resolve this you must set the Password Expiry Module to only run against 64-bit applications:
   a. Amend the following path:

      ```
      <add name="PasswordExpiryModule"
      image="C:\Windows\system32\RpcProxy\RpcProxy.dll" />
      ```

      To read:

      ```
      <add name="PasswordExpiryModule"
      image="C:\Windows\system32\RpcProxy\RpcProxy.dll"
      preCondition="bitness64" />
      ```

5. The 64-bit version of the Exchange OWA Cookie Authentication installed by Microsoft Exchange 2007 is incompatible with 32-bit application pools.

   To resolve this, you must set the module to only run against 64-bit applications:

a. Amend the following path:

```
<filter name="Exchange OWA Cookie Authentication ISAPI
Filter" path="C:\Program Files\Microsoft\Exchange
Server\ClientAccess\owa\auth\owaauth.dll"enabled="true"
/>..
```

To read:

```
<filter name="Exchange OWA Cookie Authentication ISAPI
Filter" path="C:\Program Files\Microsoft\Exchange
Server\ClientAccess\owa\auth\owaauth.dll"enabled="true"
preCondition="bitness64" />.
```

6. The 64-bit version of the Exchange ActiveSync installed by Microsoft Exchange 2007 is incompatible with 32-bit application pools.

   To resolve this you must set the module to only run against 64-bit applications:

   a. Amend the following path:

```
<filter name="Exchange ActiveSync ISAPI Filter"
path="C:\Program Files\Microsoft\Exchange
Server\ClientAccess\sync\bin\AirFilter.dll"
enabled="true" />.
```

To read

```
<filter name="Exchange ActiveSync ISAPI Filter"
path="C:\Program Files\Microsoft\Exchange
Server\ClientAccess\sync\bin\AirFilter.dll"
enabled="true" preCondition="bitness64" />
```

7. Save the file and close Notepad.
8. Restart IIS before running Sage 200.

Note: You must run IIS as an Administrator.

Turn off HTTP compression

Follow these steps if you are installing the Sage 200 Suite on:

- Microsoft Small Business Server 2008.
- A 64 bit server with your own SSL certificate.
- A 64 bit server with Microsoft Exchange 2007 or with Microsoft Windows Server 2008 Terminal Services Gateway.

The 64-bit version of the Windows Server Update Status (WSUS) installed with SBS2008 is incompatible with 32-bit application pools.

To resolve this you must disable http compression:

1. From an administrator command prompt, run the following script:

   `C:\Windows\system32\inetsrv\appcmd.exe set config`

   `section:system.webServer/httpCompression /[name='xpress'].`
2. Restart IIS before running Sage 200.

Installation Steps for running Sage 200 CRM on a 64 bit server or Microsoft Small Business Server 2008

1. Install Sage 200 CRM as per a standard installation. See Installing and setting up Sage 200 CRM for the first time on page 121. The application will create virtual directories within the Default website, this is not configurable.
2. Open IIS Manager and select Application Pools.
3. Select CRM App Pool and click Advanced Settings.
4. Set Enable 32-Bit Applications to True.
5. Click OK and close IIS Manager.

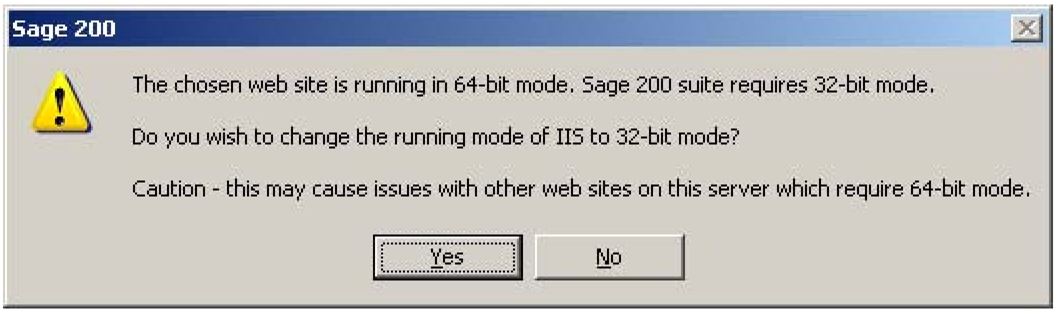
Installation Steps for running Sage 200 WTE on a 64 bit server or Microsoft Small Business Server 2008

1. From the Sage 200 Suite DVD, select the setup.exe file for the WTE Application.
2. Right-click and select Run as administrator.
3. Continue with the installation as normal until the WTE Root Web Site screen.
4. You **MUST** choose the Default Web Site from the list of websites.
5. Complete the rest of the installation wizard as per a standard installation.
6. Open IIS Manager and select Application Pools.
7. Choose the WTEPool and choose Advanced Settings.
8. Set Enable 32-Bit Application to True.
9. Click OK and close IIS manager.

How to install the Sage 200 Suite on Microsoft Windows Server 2003 64bit

Microsoft Windows Server 2003 uses IIS v6 which can either run in 32-bit mode or 64-bit mode but not both at the same time.

- When you install the Sage 200 Suite, you will see the following message if IIS is in 64-bit mode.



- Click Yes to configure IIS to run in 32-bit mode and install the 32-bit version of the ASP.NET client used by the Sage 200 Suite

No other additional installation steps are required. For information about installing the Sage 200 Suite, see Installing the Sage 200 Suite for the first time on page 39.

Installation options for virtualised platforms

All elements of the Sage 200 Suite are supported in a virtualised environment if the following conditions are met:

- The underlying virtualisation platform has been accredited by the Microsoft Windows Server Virtualisation Program. See http://www.windowsservercatalog.com/svvp.aspx for further details.
- The host operating system is one of the supported operating systems outlined in the Sage 200 v2010 System Requirements. See System requirements and prerequisites on page 3

The Sage 200 Suite is also supported when running in a Microsoft Hyper-V virtualised environment which is running one of the supported operating systems outlined in the System Requirements.

VPN connections

Due to the amount of network communication between the Sage 200 client, the Sage 200 server, and the back-end SQL server, we do not support running the Sage 200 Suite over a virtual private network (VPN) connection, where locally installed Sage 200 client machines communicate with a remote Sage 200 server. This is because the additional latency added to each network packet results in unacceptable performance and can result in database timeouts.

Hosting

We are currently investigating the options for running Sage 200 from a hosted environment.

Installing the Sage 200 Suite using Citrix or Terminal Services

The Sage 200 Suite is designed around a 'rich-client' architecture that is best suited to deployment over a local area network. The Sage 200 Suite is supported in a Microsoft Terminal Services and Citrix Presentation Server environment with the following considerations:

- As Sage 200 is best suited to deployment on a local area network, where possible, we recommend that you run large batch processes, such as Update Waiting Postings, on a high specification client joined to the local area network.

  If the entire solution is hosted remotely, large batch process tasks should be run 'out of hours' when more bandwidth and server resources are available.
- There is very little difference in terms of application performance when running the Sage 200 client in a Terminal Services or Citrix environment.

  Note: We only support Citrix in a 32-bit environment. We support Terminal Services in both 32-bit and 64-bit environments.
- On Terminal servers or Citrix servers hosting Sage 200 client sessions, you must allow:
  - At least 300MB memory per user on the Citrix/Terminal Server, for each client session running occasional or one-off tasks, such as an account enquiry or price check.
  - At least 500MB memory for each client session processing for any prolonged period of time, for tasks such as checking in stock, or creating purchase orders.
  - You should run large batch processes and updates on the local area network, or out of hours.

  Note: As we only support Citrix in a 32-bit environment, the amount of addressable memory restricts the maximum number of clients. This will limit the number of connections that can be supported on one server.
- We do not support running the Sage 200 Suite over Citrix or Terminal Services on Microsoft Windows Small Business Server 2003 or Microsoft Small Business Server 2008.

  This is because the Terminal Services Application Mode is disabled in these operating systems. See the following websites for further information:

  http://technet.microsoft.com/en-us/sbs/cc817589.aspx

  www.microsoft.com/canada/smallbiz/products/sbs/terminalservices.mspx

Supported versions of Citrix and Terminal Services

Sage 200 Modules	Windows Terminal Server 2003 (32-bit and 64-bit) Standard & Enterprise Editions, 2003 & 2003 R2	Windows Terminal Server 2008 (32-bit and 64-bit). Standard & Enterprise Editions, 2008 and 2008 R2	Citrix Presentation Server v4.5 (32-bit only, Standard, Advanced, Enterprise and Platinum Editions)	Citrix XenApp Server v5.0 (32-bit only, Standard, Advanced, Enterprise and Platinum Editions)
Sage 200 Core Components				
Sage 200 File Server	✓	✓	✓	✓
Sage 200 Application Services	✓	✓	✓	✓
Sage 200 Remote Authorisation	✓	✓	✓	✓
Sage 200 Financials Client	✓	✓	✓	✓
Sage 200 CRM				
Sage 200 CRM Server	✓	✓	✗	✓
Sage 200 CRM Client	✓	✓	✗	✓
Sage 200 Business Intelligence				
Sage 200 Business Intelligence Server	✓	✓	✓	✓
Sage 200 Business Intelligence Client (including Sage 200 BI Admin Tool)	✓	✓	✓	✓
Sage 200 Business Intelligence Excel Client	✓	✓	✓	✓
Sage 200 Commercials				
Sage 200 Commercials Client	✓	✓	✓	✓
Sage 200 Project Accounting				
Sage 200 Project Accounting Client	✓	✓	✓	✓
Sage 200 Manufacturing				
Sage 200 Manufacturing Server	✓	✓	✓	✓
Sage 200 Manufacturing Client	✓	✓	✓	✓
Sage 200 Wholesale & Retail				
Sage 200 Wholesale & Retail Server	✓	✓	✓	✓
Sage 200 Wholesale & Retail Client	✓	✓	✓	✓
Sage 200 Web Time & Expenses (WTE)				
Sage 200 WTE Server	✓	✓	✓	✓
Sage 200 WTE Client	✓	✓	✓	✓
Sage 200 Integration Server (AIS)	✓	✓	✓	✓
Sage 200 Migration Tool				
Sage 200 Migration Tool	32-bit only	32-bit only	✓	✓
Sage 200 Construction				
Sage 200 Construction	See 'Sage 200 Construction Release Notes' for further details			

Security

The Sage 200 Suite uses a combination of Windows security and SSL certificates to secure communications between the different modules.

By default the c:\Sage folder and its associated files and sub-directories on the Sage 200 File Server machine are shared with a permission level of Everyone | Full Control. We recommend that you review the permissions on this share. You may want to create a group within Active Directory that includes all the Sage 200 Suite users and assign access only to that group. You will also need to include the user that you have configured to run the Sage 200 web services in this group. Typically this would be the local NETWORK SERVICE account, or a named user that you specified as part of the installation.

By default the Sage 200 web services are deployed over HTTPS connections using a secure SSL certificate called Sage 200 SSL Certificate. When deploying additional modules such as Sage 200 CRM and Sage 200 WTE, we recommend that these are also deployed over a secure HTTPS channel.

If Sage 200 CRM and Sage 200 WTE are being deployed internally, you may use the SSL certificate that is installed by the Sage 200 Application Server. If Sage 200 CRM and Sage 200 WTE are being deployed externally, they would need to be installed to an external facing website that had previously been secured with an existing SSL certificate.

Authenticating Proxy Server and Firewall Settings

If you are running additional security measures on your network such as Microsoft Internet and Acceleration Server (ISA), Microsoft Forefront Server, or your machines access the internet via an authenticating proxy server, you **MUST** ensure that you use a specific domain account or group to run the Sage 200 web services. If you do not do this, you may see the following error when accessing the Sage 200 System Administration tool:

The request failed with HTTP status 407: Proxy Authentication Required.

Sage 200 Suite required firewall settings

The Sage 200 Suite runs a variety of programs and services that can be affected by security firewall settings. The following table details the ports that need to be opened in order for the Sage 200 Suite to function correctly.

Server	Port	Details
Database Server	TCP Port 1433	Default SQL Instance
	TCP Port 1434	Named SQL Instance
Sage 200 File Server	TCP Port 139	File & Print Sharing
	TCP Port 445	File & Print Sharing
	TCP Port 137	File & Print Sharing
	TCP Port 138	File & Print Sharing
Sage 200 Application Server (Web Server)	TCP Port 80	HTTP
	TCP Port 443	HTTPS
External Facing Sage 200 CRM / WTE Web Server	TCP Port 80	HTTP
	TCP Port 443	HTTPS

The following ports are required for Sage 200 Business Intelligence:

Server	Port	Details
Database Server	TCP Port 2386	SQL Analysis Services (for Default Instances)
	TCP Port 2384	SQL Analysis Services (for Named Instances)
	TCP Port 1434	SQL Browser Service

4

Installing the Sage 200 Suite for the first time

Sage 200 v2010 uses a 'suite' installer, similar to that of products such as Microsoft Office. When you run the Sage 200 v2010 installer, you can choose which modules of the Sage 200 Suite you install.

Use the Sage 200 v2010 Suite installer to install:

- Sage 200 Financials
- Sage 200 Commercials
- Sage 200 Project Accounting
- Sage 200 Bill of Materials
- Sage 200 Business Intelligence
- Sage 200 Manufacturing
- Sage 200 Wholesale and Retail
- Sage 200 Remote Authorisation
- Sage 200 Mobile

Note: Sage 200 Financials, Sage 200 Commercials, Sage 200 Project Accounting and Sage 200 Bill of Materials are always installed. They are activated by your licence key.

Before beginning the installation procedure, please refer to the section How to deploy Sage 200 across a network on page 13 to make sure that you know where you want to install each component.

You use the Sage 200 Suite installer, to install the various components of the Sage 200 Suite on your server(s) and client machines. Use the installation wizard to select the Server components, Application (Web Server) components and Client components that you want to install.

Note: The Sage 200 Client components must be installed on the same machine as the Sage 200 Application Services. Therefore, the Sage 200 Client components are selected by default when choosing to install Sage 200 Application Services.

The following table shows which components of the additional modules are installed when the Sage 200 components are selected.

Sage 200 components selected:	Additional components installed, if selected:
Sage 200 File Server	Sage 200 Business Intelligence File Server Sage 200 Manufacturing File Server Sage 200 Wholesale and Retail File Server
Sage 200 Application Services	Sage 200 Business Intelligence Application Server Sage 200 Manufacturing Application Server Sage 200 Wholesale and Retail Application Server
Sage 200 Client	Sage 200 Business Intelligence Client Sage 200 Manufacturing Client Sage 200 Wholesale and Retail Client

To install Sage 200 CRM, use the Sage 200 CRM installer. This can be found in the CRM folder on your Sage 200 Suite DVD. For instructions on installing and setting up Sage 200 CRM, see Installing and setting up Sage 200 CRM for the first time on page 121.

To install Sage 200 Web Timesheets and Expenses, use the WTE installers. These can be found in the WTE folder on your Sage 200 DVD. For installation instructions see the Sage 200 Web Time sheets and Expenses Guide. This can be found in the Sage 200 User Guides folder on your Sage 200 DVD.

Installing Sage 200 Business Intelligence

Sage 200 Business Intelligence has three components: the BI File Server, BI Application Server and BI Client.

Two components are installed with the BI Client: The BI Admin Tool and the BI Excel Add In.

- The BI Admin Tool is always installed.
- The BI Excel Add-In is only installed if there is also a compatible version of Microsoft Excel installed on the same machine. The compatible versions are:
  - Microsoft Excel 2003
  - Microsoft Excel 2007 (recommended)

Installing Sage 200

The following steps explain how to install Sage 200 using the Sage 200 Suite installer.

To install Sage 200 on more than one server, use the Sage 200 Suite installer on each server and select the required components from the Installation wizard. For more information about choosing the components to install, see How to deploy Sage 200 across a network on page 13.

Once you have installed Sage 200 on your server(s), you install the Sage 200 Client on your client machines. See How to install the Sage 200 client across your network on page 46.

To install Sage 200

1. Insert the Sage 200 DVD, the Installation wizard appears.

   If you do not have Autorun enabled, select the Setup.exe file from the DVD.
2. Click Next to continue. The Sage 200 License Agreement screen appears.
3. Accept the license agreement. Click Next to continue. The Server Components screen appears.
4. Use this screen to select the Sage 200 server components you want to install. Choose from the following options:
   - Install Sage 200 File Server

     Select this to install reports, layouts, and other files and directories required by the Sage 200 Suite.

     The Sage 200 File Server is mandatory for an installation of the Sage 200 Suite.
   - Install Sage 200 Application Services (formerly known as the Web Server)

     Select this to install application files and web services. These are essential for the integration between modules in the Sage 200 Suite.

     To install the Sage 200 Application Services, you must have IIS v5 or higher installed.

     Sage 200 Application Services are mandatory for an installation of the Sage 200 Suite.
   - Install Sage 200 Remote Authorisation

     Select this if you want to authorise purchase orders created in Sage 200 outside of the Sage 200 application, via a website.

     You must either install Remote Authorisation on the same machine as the Sage 200 Application Services, or on a machine with an externally accessible website secured with an SSL certificate.

Sage 200 Remote Authorisation is an optional module.

For more information about Purchase Order Authorisation, see the New Features Guide in the Sage 200 USer Guides folder of your Sage 200 DVD.

Click Next to continue. The Client Components screen appears.

5. Select the Sage 200 Client components that you want to install.

   Choose from the following options:

   - Install Sage 200 Client

     Select this to install the application files and directories necessary to run the Sage 200 client application, and the Sage 200 System Administration tool.

     Note: If you have previously chosen to install Sage 200 application services, the Install Sage 200 Client option is automatically selected. This is because Sage 200 Application Services and the Sage 200 Client must both be installed on the application server machine.

     The Sage 200 Client is mandatory for an installation of the Sage 200 Suite.

   - Install Sage 200 Form Launcher

     If you are also installing Sage 200 CRM, select this to install the integration component required to launch Sage 200 forms from within Sage 200 CRM.

     Further configuration of the Sage 200 Form Launcher is required if you:

     - Have an application using the HTTP port 8088.

       See Change the port number for the Sage 200 CRM Form Launcher on page 143.

     - Are running Sage 200 in a Terminal Server or Citrix environment.

       See Using the Form Launcher with Terminal Services and Citrix on page 144.

   - Install Sage 200 Mobile

     Select this to install the Sage Secure Gateway Client. This is required if you want to use Sage 200 Mobile. It is used for secure communications between Sage 200 Mobile and the Sage 200 Mobile Client. This will only be available if you have previously selected to Install Sage 200 Application Services.

   Click Next to continue. The Sage 200 Additional Components screen appears.

6. Select the Sage 200 Additional Components that you want to install.

The Sage 200 Additional Components have file server, application server and client installations. The part that is installed here depends on the options you have chosen in the previous screens.

For example, if you have only chosen to Install the Sage 200 File Server, only the file server component of the additional modules will be installed.

Choose from the following modules, all of which are optional:

- Install Sage 200 Business Intelligence
- Install Sage 200 Manufacturing

  Select Install Graphical Planner if you have purchased this along with Sage 200 Manufacturing.

- Install Sage 200 Wholesale and Retail

  You must install Sage 200 Wholesale and Retail on all client machines even if you do not intend to use it on all machines. If Wholesale and Retail is not installed on all client machines, you will see the following error message:

  The Retail module is not installed on this Sage 200 Client. Since Retail is installed on Sage 200 Server, you need to install the modules on all clients too.

Note: You cannot install Sage 200 Manufacturing and Sage 200 Wholesale and Retail on the same solution.

Click Next to continue. The Server Location screen appears.

7. Specify the location of the Logon Folder and Spool Folder for the Sage 200 File Server.

   Make sure there are no spaces in the location of the Logon Folder as this will cause the installation to fail.

   Click Next to continue. The Server Login Details screen appears.

8. Use this to select the Windows user account that will be used by Sage 200.

   - Local

     Select this if you intend to run the Sage 200 Suite from a single server. In this case, the local NETWORK SERVICE account is used.

     For non-production environments running Windows XP, this screen does not appear as the ASP.NET Machine Account is used by default.

   - Specific Account or Group

     This is the default option. Select this to use a specified Windows user account that you have created especially for the Sage 200 Suite. This can be a standard domain user account and does not need any special privileges.

Click Next to continue. The Sage 200 Application Services screen appears.

9. Choose the website that will host the Sage 200 Application Services.

   To install Sage 200 on a single server, select Default Website from the website drop-down list. Click Next to continue.

   If you have previously chosen to install Sage 200 Remote Authorisation, the Sage 200 Remote website screen appears.

10. Choose the website that will host the Sage 200 Remote Purchase Order Authorisation website. You can:

    - Access the Remote Purchase Order Authorisation website from your internal network.

      To do this you must install the Sage 200 Suite on a single server, and select Default Web site from the Web Site drop-down list.

      This uses the SSL certificate that is installed by the Sage 200 Application Services to secure the web site. This web site is only accessible from your internal network.

    - Access the Remote Purchase Order Authorisation web site on an external web site.

      To do this, you must install the Sage 200 Suite on more than one server. For more information, see Deploying Sage 200 on separate file, application and web servers on page 20.

      The Sage 200 Remote Authorisation module must be installed on a machine with an external facing web site secured with a SSL certificate.

    If you have chosen to install Sage 200 Remote Authorisation, the Sage 200 Web Services location screen appears.

11. Enter the path to the Sage 200 Application Services web site in the following format:

    https://<*Machine_Name*>/Sage200WebServices

    The <Machine_ Name> is the name of the machine running the Sage 200 Application Services.

    This allows the Sage 200 Remote Authorisation module to communicate with the rest of the suite.

    Click Next to continue. The Sage 200 Client Destination Folder screen appears.

12. Specify the folder where you want to install the Sage 200 client. By default this is C:\Program Files\Sage\Sage 200. Click Next to continue.

13. To install the Sage 200 modules you have selected, click Install. Click Finish when the installation is complete.

How to install the Sage 200 client across your network

Once you have installed and configured Sage 200 on your server machine, you can move across to each of the clients and install the necessary client-side modules.

In Sage 200 v2010, you can install the Sage 200 Client across your network by using the network share, created automatically when you installed the Sage 200 File Server.

1. From the client machine, choose Start > Run.
2. Enter the UNC path to your Sage 200 File Server. For example \\<*Machine_ Name*>\Sage.
3. Select the Installers folder. Run the setup.exe file from within this folder.

   The Sage 200 Suite installer will install the pre-requisites required by the Sage 200 Client, if they are not already installed. These are Microsoft DotNet Framework v3.5 SP1 and Microsoft Web Service Enhancements (WSE) v3.

   Follow the on screen wizard to install these components.

   The Sage 200 Suite Welcome Screen appears.
4. Click Next to continue with the installation.The Sage 200 License Agreement screen appears.
5. Accept the license agreement and click Next to continue. The Server Components screen appears.
6. Do not select any of the Server Components. Click Next to continue. The Client Components screen appears.
7. Make sure Install Sage 200 Client is selected. Click Next to continue. The Sage 200 Additional Components screen appears.
8. If you chose any of the additional modules during the server installation, these modules will be selected. Click Next to continue. The Server Location screen appears.
9. Make sure that the Logon Folder and Spool Folder contain UNC paths to your Sage 200 File Server. Click Next to continue. The Client Destination Folder screen appears.
10. Enter the folder where the Sage 200 client is installed. By default this is C:\Program Files\Sage\Sage 200. Click Next to continue.
11. Click Install to install the Sage 200 Client modules that you have selected.

    Once the installation is complete, click Finish to complete the installation.

Troubleshooting

- If you are using the Sage network share to install your Sage 200 clients, you may want to set the spool path for each client. The default spool path is c:\Sage\Spool.

  If you want to use a shared spool path on the server for your client machines, you must edit the c:\sage\installers\installSettings.xml file on the Sage 200 File Server before running the installation.

  To do this:

  a. Open the c:\sage\installers\installSettings.xml file on the Sage 200 File Server.
  b. Change the property SPOOLPATH to <*name of your file server machine*>\sage\spool>

- If you are installing the Sage 200 Client from a network share, hosted on a Windows 2003 Server you see the following message:

  The system administrator has set policies to prevent this installation.

  This is due to the client machine running out of virtual memory whilst it is trying to download and validate the Sage 200 installation files from the server.

  To resolve this and for further information, see the following Microsoft knowledgebase article: http://support.microsoft.com/kb/925336.

- If you install the Sage 200 File Server, Sage 200 Application Services and Sage 200 Client on a 64-bit server, the installation path for the Sage 200 Client will default to c:\program files **(x86)**\sage\.... This path is added to the C:\Sage\installers\installSettings.xml file on the Sage 200 File Server. This file is used when you install your Sage 200 clients from the Sage network share.

  If you then run the setup.exe from the Sage network share on a 32-bit client, the path remains as c:\program files **(x86)**\sage\.... instead of reverting to c:\program files\sage\.... To resolve this:

  - Edit the file c:\sage\installers\installSettings.xml and change the property INSTALLPATH to C:\Program Files\Sage\Sage200\ before installing Sage 200 on the client machines.

Adding Sage 200 modules to an existing installation

After the initial installation of Sage 200, you can install additional modules using the Windows Control Panel to open the Sage 200 Suite installation wizard.

Warning

On the Sage 200 Installation wizard, any components of Sage 200 that you have already installed will automatically be selected. Do not clear these check boxes. This will remove that component.

To add Sage 200 modules

1. Choose Start > Control Panel > Programs and Features.
2. Select Sage 200 and choose Change.
3. On the Sage 200 Installation screen, click Next.
4. Select Change.

   The Sage 200 Server Components screen appears. The modules you have currently installed are selected.
5. Choose any of the additional server components that you wish to add to the installation. Click Next to continue.

   The Sage 200 client components screen appears.
6. Select the client components that you want to install. Click Next to continue.

   The Sage 200 Additional Components screen appears.
7. Select any additional components that are not currently selected that you want to install. Click Next to continue.
8. To install the additional components you have selected, click Change.
9. Click Finish to complete the installation.

Removing Sage 200 modules from an existing installation

After the initial installation of Sage 200, you can remove installed modules using the Windows Control Panel to open the Sage 200 Suite installation wizard.

To remove Sage 200 modules

1. Choose Start > Control Panel > Programs and Features.
2. Select Sage 200 and choose Change.
3. On the Sage 200 Installation screen, click Next.
4. Select Change. The Sage 200 Server Components screen appears.

   The modules you have currently installed are selected.
5. Clear the checkbox for any Sage 200 server components that you want to remove. Click Next to continue.

   The Sage 200 Client Components screen appears.
6. To remove the client components, clear the relevant checkboxes. Click Next to continue.

   The Sage 200 Additional Components screen appears.
7. Clear the checkboxes for any additional components that you want to remove. Click Next to continue.
8. To remove the selected components, click Change.
9. Click Finish to remove the modules.

5

Setting up Sage 200 to use for the first time

Before you can access and start using Sage 200, you must set up the Sage 200 System Administration tool and set up the individual modules within the Sage 200 application.

The Sage 200 System Administration tool is used to set up security features, companies, user accounts and roles and to specify which menu options users can access in Sage 200, for all the Sage 200 modules.

This section explains how to set up Sage 200 System Administration and the Sage 200 application for the following modules:

- Sage 200 Financials
- Sage 200 Commercials
- Sage 200 Project Accounting
- Sage 200 Bill of Materials

If you are using other modules, there may be additional configuration tasks. Please see the relevant sections for each product:

- Set up Sage 200 Business Intelligence on page 79
- Set up Sage 200 Manufacturing on page 105
- Set up Sage 200 Wholesale and Retail on page 117
- Installing and setting up Sage 200 CRM for the first time on page 121

Setting up Sage 200 System Administration for Sage 200

Before you can access Sage 200, you must use the Sage 200 System Administration application to:

- Enter your Sage 200 licence key.
- Create a configuration database.

  This holds all the data for the System Administration tool in a SQL server database.
- Create your company databases.

  Each Sage 200 company has a database stored on your SQL server.
- Create users.

  You must create at least one user account in the System Administration tool. You use the user accounts to access Sage 200. Each user account must be a member of a role.
- Create Roles and authorise features.

  You use roles to specify which parts of the Sage 200 Suite you want your users to access. You do this by creating a role and then authorising the relevant features for that role. Features are the specific menu options in the Sage 200 Suite.

  An Administrator role is set up by default.

  Before you can access Sage 200, you must authorise features for at least one role.

Note: You must be connected to the SQL server before you can access the Sage 200 System Administration tool.

The following sections explain how to configure the System Administration tool to allow a single user to access Sage 200.

For detailed information on the options available in the System Administration tool, please see the System Administration help.

Enter your Sage 200 licence key

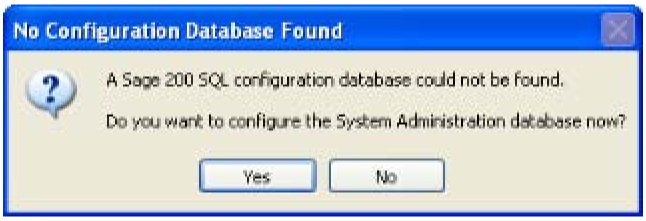
1. Choose Start > All Programs > Sage Tools > Sage 200 > System Administration. A System not enabled message appears.
2. Click OK.
3. Select Licence from the Navigation pane.
4. Right-click and choose Update.
5. Enter your licence key.

   Note: Select Line Mode if you want to copy and paste the key into each line.

6. Click OK.

Create your configuration database

1. After you have entered your licence key, the following message appears.



2. Click Yes to create a new configuration database. The Server Properties window appears.
3. Enter or browse for the correct SQL server.
4. Click Create to create the configuration database.
5. If required, enter the Logon Name and Password for a SQL user that has access rights to create a database.
6. Click OK.

Log on to System Administration

A Manager log on account for the System Administration tool is set up by default.

This account has no password. For your system security we recommend that you set a password for the Manager account as soon as possible.

1. Open Sage 200 System Administration . The Logon window appears.
2. Enter Manager as the Logon name.
3. To create a password for the Manager account, click Reset Password.
4. Enter the first line of your Licence key and a new password.
5. Click OK.

Create your company database

You can use Sage 200 System Administration to create new SQL databases for your Sage 200 companies.

If you have an existing Sage 200 company database, you must add the company to the System Administration application. The database must be attached to your SQL server.

For more information, see Upgrading to Sage 200 v2010 on page 151.

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 the Sage 200 Suite.

Before you can use the demonstration data, you must add the demonstration data as a company in Sage 200 System Administration. A SQL backup for the demonstration data is available on the Sage 200 DVD in the Demo Environment Data folder.

To create a new company database

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.
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.
Attachments	Enter the path to the Attachments folder for this company. This must be a UNC path. This is the directory used to store company specific files, such as documents and layouts. You must use separate attachments directories for different companies.
Spool	Enter the path to the Spool folder for this company. This must be a UNC path. This is the directory used to store report spool files. We recommend that you use separate spool directories for different companies.

4. Enter your Server Settings:

Server	Enter the name of your SQL server. You must have the appropriate permissions to access the server.
Database Name	Enter the name of the database on the server. If this is an existing Sage 200 database that is attached to the SQL server, select the database from the drop-down list.

5. Choose from one of the following:
   - Test
     Click this to test the connection to the database.
   - Update
     Click this to update an existing Sage 200 database.
   - Create
     Click this to create a new Sage 200 database on your SQL server.

Create user accounts and roles, and authorise features

You use user accounts to manage who can access Sage 200. You must associate each user account with a company and a role before they can access Sage 200.

Each user account must be a member of a Role. You use Roles to control which menu options your users can access in Sage 200.

Each menu option in Sage 200 is listed as a Feature in Sage 200 System Administration. To make each menu option available to your users when they log on to Sage 200, you must authorise the relevant features for each role.

If you have not set up any new roles, you must authorise features for the default Administrators role, before any users can log on to Sage 200. We recommend that you use a separate user account to administer Sage 200.

The LOCALSYSTEMACCOUNT user account is set up by default. This is connected to the Local System role. This user account and role is used by Sage 200 to allow remote access to Sage 200 when no users are logged on.They are used to access Sage 200 when automatic processes are run, such as recording the receipt of an online payment, accessing Sage 200 data from a Blackberry device and generating purchase order authorisation notification emails. You cannot use this user account to log on to Sage 200.

Before you can log on to Sage 200, you must:

- Set up at least one new user account.
- Associate this user account with a role.
- Authorise the relevant features for the role.

To create a user account

1. From the Navigation bar, choose Users.
2. Right-click and choose Add New User.
3. Enter a Logon Name for the user.

   Each Logon Name must have at least one character and be unique.
4. Enter and confirm a password for the user.

   The password must conform to the password policy.

   Note: To use a single sign on, the Sage 200 user account must have the Sage 200 password set to blank.

   For more information about setting a password policy, see the System Administration help.
5. Click OK. The User properties window appears.
6. Enter the User Properties on the relevant tabs.

7. 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.
User Password Never Expires	Select this if you are setting up a user to access Sage 200 remotely. For example, for Sage 200 Web Time Sheets and Expenses. Do **not** select this for Sage 200 CRM users.
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.

8. Select the User details tab. If required, enter information about your user.
9. Select the Member of tab. Use this to assign a role to your user.

   You must assign at least one role to the user.

   If you have not set up any new roles, select Administrator. Use the arrow keys to move the Administrators role to the Selected Roles list.

   For information about creating new roles, see the System Administration help.
10. 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.
11. Click OK to save the user properties.

To authorise features for a role

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.

      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.
4. Click OK.

For more information about user accounts, role, and features, see the System Administration help. Press F1 for help on each window.

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.

> For more information about processing online card payments in Sage 200, see the Sage 200 help.

To set up System Administration

1. Set up an account with the payment service provider.

   Sage Pay is the payment service provider used by Sage 200.

2. Enter an Online payments address.

   This is the URL needed by the Sage 200 Card Processing Web Service.

   a. From the Navigation bar, choose Online Payments.

   b. Right-click and choose Properties.

   c. Enter the URL for the Sage Pay web service in the Sage 200 Card Processing Web Service box.

3. Add Vendor accounts.

   The Vendor Account identifier accompanies every payment transaction made with the online payment service provider.

   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 information about the details required, see the System Administration help. Press F1 for help on each tab.

Set up Sage 200

The following steps are done within the Sage 200 program.

1. Set up merchant accounts:

   Open: Sage 200 > Accounting System Manager > Settings > Merchant Account Settings.

2. Enable card processing:

   a. To accept online payments for invoices:

Open: Sage 200 > Sales Ledger > Ledger Set Up > Ledger Settings | Options. Select Enable Card Processing.

a. To accept online payments for sales orders:

Open: Sage 200 > Sales Order Processing > System Set Up > SOP Settings | Order Entry. Select Enable Card Processing.

Set up Purchase Order Authorisation

You can send email messages to Sage 200 users when purchase orders require authorisation in Sage 200. Once set up, an email is sent to the Sage 200 user specified as the *authoriser* of a purchase order. Another email is sent to the Sage 200 user specified as the *originator* of the order.

You can also allow Sage 200 users who are specified as *authorisers* of purchase orders, to authorise their purchase orders outside of Sage 200. Once set up, your authorisers can authorise their purchase orders via the Sage 200 Remote Authorisation website. You must have installed the Remote Authorisation web service on your application or web server machine. For more information, see Installing Sage 200 on page 42.

For more information and a troubleshooting guide to setting up email notifications and remote authorisation, see Troubleshooting purchase order email notifications in the Sage 200 System Administration help.

To send email notifications and set up remote authorisation

1. Configure your E-Mail settings.
   a. From the Navigation Bar choose Messaging > E-Mail Settings. The email settings are displayed.
   b. To enter or change your email settings, click Edit.
   c. Enter your email Server Information details.

      You can use either a Microsoft Exchange Server or an SMTP mail server to deliver the purchase order notification email messages.

E-Mail Server	Enter the name of your exchange or SMTP server.
Server Port Number	Select the IP port number used for your email server. By default, this is 25.
Server requires secure connection (SSL)	Select this if your email server uses a secure connection.
User Login	Enter the email account name of the user. This is the user who will generate purchase order authorisation emails.

Password Confirm Password	Enter and confirm the user's email password.

d. Enter the E-Mail Details.

From	This is the email address displayed as the From address for email messages sent using this service.
Reply To	This is the email address used as the Reply address for email messages sent using this service. This can be a different address if you want all replies to go to a centralised email account.

e. To test the email server settings, enter an email address in the Send E-Mail To box and click Send.

   A test email message is sent to the address specified.

f. To save your e-mail settings, click OK.

2. Enter the Sage 200 Notifications Service web address.
   a. From the Navigation bar, choose Messaging > Notifications Service.
   b. To enter or change the Notifications Service Web Address, click Edit.
   c. Enter the Web Service Address of the Sage 200 Notifications Service.

      For example:

      https://*name of machine where Sage 200 web service is installed*/Sage200WebServices/SageNotificationsService.asmx.
   d. Click OK to save the address.
3. Enter the Purchase Order Authorisation settings.
   a. From the Navigation bar, choose Messaging > Purchase Order Authorisation. The Purchase Order Authorisation settings are displayed.
   b. To enter or change the settings, click Edit.

c. Enter your Notification Settings:

Use Email Notifications	Select this to activate email notifications for purchase order authorisation.
Include Remote Authorisation Link in Email	Select this to include a link to the remote authorisation website on your email notification messages to authorisers. Enter the Remote Authorisation Web Address. This is where you have installed the remote authorisation website. For example: https://*name of machine where Sage Remote Authorisation website is installed*/Sage200RemoteAuthorisation.

d. Click OK.

4. Identify the Sage 200 user accounts that you want to receive these email messages and enter an email address for these Sage 200 user accounts.
   a. From the Navigation bar, choose Users.
   b. Select a user account.
   c. Select the General tab. Select Receive Notifications by Email.
   d. Select the User Details tab. Enter an Email address for the user.
   e. Click OK.

Start the Sage 200 Notifications Web Service

Once you have set up the email notification in the System Administration tool, you must make sure the Sage 200 Notifications Web Service is started.

1. Choose Start > Run.
2. Enter services.msc and click OK.
3. Select the Sage 200 Notification Scheduler. Make sure the Startup Type is set to Automatic.
4. Start the service.

Set up Sage 200 Mobile

Sage 200 Mobile allows you to access your Sage 200 information from a Blackberry device. To view Sage 200 data from your Blackberry device you must:

- Activate Sage 200 Mobile on your Sage 200 Application Server, using the Sage 200 System Administration tool.
- Choose which Sage 200 user accounts can have access to your Sage 200 data from a Blackberry device.
- If you are using Sage 200 Mobile with Sage 200 CRM, you must configure the CRM data source using the Sage 200 System Administration tool. You must also enter your user's *passport membership number* in Sage 200 CRM.
- Configure workspace views.

  A workspace view is a Sage 200 Workspace that has been set up for use with Sage 200 Mobile. You must choose which views you want to make accessible on your Blackberry device.
- Install Sage 200 Mobile on your Blackberry device.

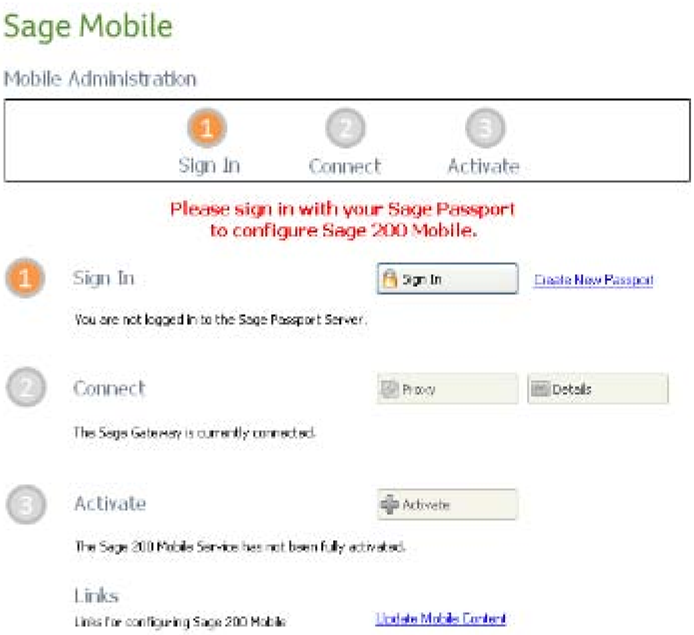
Note: You cannot use Sage 200 Mobile if Sage 50 is installed on the same machine as Sage 200.

Activate Sage 200 Mobile

Activating Sage 200 Mobile configures your connection to the Sage Gateway server and creates a subscription based on your licence key.

Note: The passport you sign in with when you activate Sage Mobile must be used by everyone who will access Sage Mobile settings in System Administration (e.g. to add more users). Therefore we recommend that you do not use your own personal passport, but instead create a separate passport for administration purposes that can be used by everyone.

1. Open Sage 200 System Administration.
2. From the Navigation bar, choose Mobile > Setup.



3. Sign in or create a Sage Passport.

   A Sage Passport is a secure profile and password for all your Sage web services.

   To create a Sage Passport, click the Create New Passport link.

   To sign in with your Sage Passport:

   a. Click Sign In.
   b. Enter your Passport E-mail Address.
   c. Enter your Password.
   d. Click OK.

4. If you access the Internet via a proxy server, enter these details.

   a. Click Proxy (in the Connect section).
   b. Select Manual proxy configuration.
   c. Enter the HTTP proxy address and the Port number.
   d. If authentication is used, enable Proxy authentication required.
   e. If logon details are required, enter the Domain name, User name, and Password.
   f. The Bypass list is used to specify resources (addresses) that need to be accessed directly and not via the proxy server.

5. Activate Sage 200 Mobile.

   a. Click Activate.
   b. Enter the Data Service Installation details.

Note: To install the Sage 200 Mobile Data Service, you must have administrative privileges on the machine. If the Sage 200 File server and Application server are installed on different machines, then you must also be a domain administrator.

The status will be updated to show the service has been activated.

Set up mobile access for users

1. From the Navigation bar, choose Users.
2. Right-click the user and select Properties, then select the Mobile Access tab.
3. Sign in with your Sage Passport.
   a. Click Sign In.
   b. Enter your Passport E-mail Address.
   c. Enter your Password.
   d. Click OK.
4. Enter the passport details of the user for whom you want to enable Mobile access.
   a. Enter the user's Passport E-mail Address.
   b. Click Validate.

   If the passport email address is validated, a confirmation message appears and the Passport Membership No is displayed.

   Note: If you are using Sage 200 CRM, this number must also be entered in the user's settings in Sage 200 CRM.
5. To provide the user with Sage 200 Mobile access, select Allow user to access Sage 200 using a Blackberry device.
   - To inform the user that they have access, click Send E-mail to send an introductory message. The message also includes details of where to download the Sage 200 Mobile application.

   Note: To send a message, you need to have first set up the email server settings in Messaging. For more information about entering your email settings, see Set up Purchase Order Authorisation on page 63.
6. Click OK to close the user properties.

Configure Mobile workspace views

1. From the Navigation bar, choose Mobile > Workspace views.

   The list of workspace views are displayed. The Mobile View column indicates which views are set to be available in Sage 200 Mobile.

The following workspace views are intended to be used on a Blackberry device:

- Project Position.
- Cash Position.
- My Sales Summary.
- Sales Revenue Position.

2. Select the workspaces to display as views in Sage 200 Mobile:
   - To select or deselect an individual workspace, right-click its name and select Toggle.
   - To select a number of workspaces at the same time, right-click Workspace Views in the Navigation bar and select Configure Workspace Views.
3. To update these changes to your Blackberry devices, select Mobile > Setup in the Navigation bar and click Update Mobile Content.

   Note: You cannot update the changes on your Blackberry device while Sage 200 is running. If Sage 200 is still running you will see a warning message.

   A message is displayed to confirm that Sage Mobile (schema and manifest) has been updated. Click OK.

Configure Sage 200 Mobile with Sage 200 CRM

If you are using Sage 200 Mobile with Sage 200 CRM, you will need to:

- Configure the CRM data source in System Administration.
- Enter each user's Sage Passport Membership Number in CRM.

To configure the CRM data source

Open: Sage 200 System Administration > Information Management > Data Sources | General.

1. Right-click the Sage 200 CRM data source and choose Properties.
2. Make sure that the Use Client Side Connection String box is not selected.
3. Set the Default Connection String by clicking the browse (...) button.
4. In the SQL Server Data Source Properties window, enter the connection settings to your CRM database.

   Click Save.
5. Click Test Connection String to test the string is valid.

   A message is displayed to confirm whether the connection was successful or not.
6. Click OK to close the properties window.

To set a user's Passport Membership No in Sage 200 CRM

For each CRM user that will use Mobile, you must enter their Sage Passport Membership No in their Sage 200 CRM user settings.

Note: The Passport Membership No can be found in the User Properties in System Administration.

1. Browse to Administration > Users > Users.
2. Select the user and click Change.
3. Set the Sage Passport Membership Number.

   Note: This setting will only be available after you have set up the CRM integration within Sage 200. For more information, see Set up Sage 200 CRM in Sage 200 on page 130.

4. Click Save.

Install Sage 200 Mobile on your device

To install Sage 200 Mobile on your Blackberry device, the debvice's owner needs to download the Sage 200 Mobile application from the Sage website onto their Blackberry.

To download the Sage 200 Mobile application, visit www.sage.co.uk/Sage200Mobile/SignUp.

When you enable Sage 200 Mobile for a user, you can send the user an introductory email with details of how to download the Sage 200 Mobile application.

Testing Sage 200 Mobile using a Simulator

You can test your installation of Sage 200 Mobile on a Blackberry simulator. This is produced by Research In Motion.

Install the Simulator

You can download the Blackberry Bold 9000 simulator from the Research In Motion website.

1. Download and install the Java SE Development Kit 5.0u17 from the following website:

   https://cds.sun.com/is-bin/INTERSHOP.enfinity/WFS/CDS-CDS_Developer-Site/en_US/-/USD/ViewProductDetail-Start?ProductRef=jdk-1.5.0_17-oth-JPR@CDS-CDS_Developer.

2. Download and install BlackBerry® Email and MDS Services Simulator Package v4.1.2 (Bundle 17)from the following website:

https://www.blackberry.com/Downloads/entry.do?code=060AD92489947D410D897474079C1477

a. Select BlackBerry Email and MDS Services Simulator Package from the drop-down list and select Next.
b. Download the BlackBerry® Email and MDS Services Simulator Package v4.1.2 (Bundle 17).

3. Download and install the BlackBerry® Device Simulators v4.6.0.92 (9000 Vodafone) from the following website: https://www.blackberry.com/Downloads/entry.do?code=060AD92489947D410D897474079C1477
   a. Select Blackberry Device Simulators v4.6.0 from the drop-down list and click Next.
   b. Download BlackBerry® Device Simulators v4.6.0.92 (9000 Vodafone).

Install Sage 200 mobile on your simulator

1. Download the Sage 200 Mobile client from www.sage.co.uk/Sage200Mobile/SignUp and copy the files into the program directory of the Blackberry Smartphone simulator.

   For example: C:\Program Files\Research In Motion\BlackBerry Smartphone Simulators 4.6.0\4.6.0.92 (9000-Vodafone).
2. Within the program directory of the Blackberry Simulator, edit the Windows batch file and add /clear-flash to the end of the path for fledge.exe.

   For example, `fledge.exe/app=Jvm.dll/handheld=9000 /session=9000/app-param=DisableRegistration/app-param=JvmAlxConfigFile:9000-Vodafone.xml/data-port=0x4d44 /data-port=0x4d4e/pin=0x2100000A` **`/clear-flash`**.

   Note: The name of the Windows batch file will vary depending on which version of the simulator you are using. For example, 9000_Vodaphone.bat.
3. Start the MDS Services Simulator. Select Start >Programs > Research In Motion > BlackBerry Email and MDS Services Simulators 4.1.2 > MDSStart.
4. Start the Blackberry simulator. Select Start > Programs > Research In Motion > BlackBerry Smartphone Simulators 4.6.0 > 4.6.0.92 (9000-Vodafone) >9000-Vodafone.
5. From the Blackberry main menu choose Options.
6. Select Sage Mobile from the list of device options.
7. Scroll down to Use default Connection. Press F9 to change the option from Yes to No.
8. Scroll down to BES/MDS. Press F9 to select this option.

9. Press Escape to close the menu. Choose to save the changes.
10. Press Escape to return to the Blackberry menu.
11. Open the Downloads folder.
12. Launch Sage 200 Mobile.
13. Enter your Sage Passport email address and password and choose Proceed.

You can now use Sage 200 Mobile to view your Sage 200 data. Select the View menu to see a list of available workspaces.

Check for updates to Sage Secure Gateway

Periodically the Sage Secure Gateway is updated (which is used to ensure a secure connection between Sage 200 Mobile and your Sage 200 data).

To check for updates:

1. Choose Start > All Programs > Sage Secure Gateway > Sage Secure Gateway Client.
2. Choose the link Check for gateway software updates.
3. Click Check for Updates.
4. Any available updates can be installed by choosing Apply Updates.
5. Follow the on-screen installation wizard to install the update.
6. Close the Sage Gateway Control panel.

Set up Sage 200

The Sage 200 Suite consists of a number of integrated core modules. The Financials, Commercials, Project Accounting and Bill of Materials modules are always installed as part of the Sage 200 Suite 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 the Sage 200 Suite 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 provides a brief list of the essential setup required for each of the core modules.

> For detailed information about the settings for each module, see the Sage 200 help. (Press F1 for information about each window.)

To set up the Accounting System Manager

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

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

   Open: Accounting System Manager > Settings > Company Details.

2. Set up any common information that applies throughout the Sage 200 Suite 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.

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.

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 will 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 entry 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

You can use Sage 200 Bill of Materials on its own or as part of Sage 200 Manufacturing. Use this section if you are using Sage 200 Bill of Materials on its own. If you are using Sage 200 Manufacturing, see Set up Sage 200 Manufacturing on page 105.

Important

If you are using or planning to use Sage 200 Manufacturing, you must follow the guidelines for If you are using Bill of Materials with Manufacturing on page 105.

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.

6

Set up Sage 200 Business Intelligence

Once you have installed Sage 200 Business Intelligence, you must complete the following setup tasks:

- Add the BI module to the Sage 200 desktop.
- Configure Microsoft Excel to use the Sage BI add-in.
- Set your security settings to use BI.
- Set up the BI Admin tool.

This section has a troubleshooting section which covers some of the issues that you may need to be aware of when using the software.

It also gives answers to the most common questions that are asked about Sage 200 Business Intelligence.

For information on how to install Sage 200 Business intelligence, see Installing the Sage 200 Suite for the first time on page 39.

For information on upgrading an existing installation of Sage 200 Business Intelligence, see Upgrading to Sage 200 Business Intelligence v2010 on page 158.

Set up Business Intelligence in Sage 200 System Administration

Before you can access BI from within Sage 200, you must authorise the BI features for the appropriate roles in the Sage 200 System Administration tool.

For more information, see the Sage 200 System Administration help.

To enable the BI features in System Administration

1. Choose Start > All Programs > Sage Tools > Sage 200 > System Administration.
2. Enter the Manager Logon name and Password. Click OK.

   The Core Components for Business Intelligence are installed the first time you log on to Sage 200 System Administration after installing BI.
3. From the Navigation Bar, select Roles.
4. Select a Role that you want to use BI. Right-click and select Features.
5. Make sure BI Reports is selected.
6. Click OK.

Configure Microsoft Excel to use the Sage Business Intelligence add -in

You must enable the Sage BI Excel Add-in to use it with Microsoft Excel.

The BI reports use macros. If your Microsoft Excel security setting are set too high, some of these macros will not run. To run these macros, you must change the Excel security settings.

If you also use Microsoft Excel on its own, we recommend that you disable the Sage BI add-in first. This resets the Microsoft Excel security settings and Excel will start more quickly.

Note: If you do change your Microsoft Excel security settings, potentially unsafe macros may run when you open other workbooks created outside BI.

To enable the Sage BI Excel add-in for Sage 200

1. Choose Start > Sage Tools > Sage 200 > Enable or Disable Sage BI.
    - To use Microsoft Excel with Sage BI, select Enable the BI Excel Add-in.
    - To use Microsoft Excel without Sage BI, select Disable the BI Excel Add-in.
2. Click OK.

To change your Microsoft Excel security settings

Microsoft Excel 2007

1. In Microsoft Excel, click the Office button and the click Excel Options.
2. Select Trust Center and then click Trust Center Settings.
3. Select Macros Settings, and then select Disable all macros except digitally signed macros.
4. Click OK.

Microsoft Excel 2003

1. In Microsoft Excel, choose Tools > Macro > Security.
2. Select Low Security and click OK.

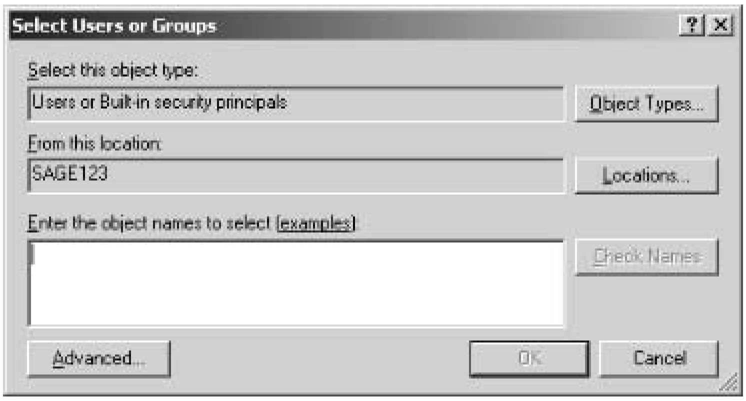
Set up security for Business Intelligence

You must make sure that the appropriate users have access to the Sage 200 BI SQL database, and that the SQL database and Microsoft Analysis Services are included in your firewall exceptions list.

To set the SQL server security settings

This allows non administrator users to have access to the Sage 200 BI database.

1. Choose Start > Programs > Microsoft SQL Server 2005/8 > SQL Server Management Studio.
2. From the Server type, select Analysis Services.
3. From the Server name list, select the required instance and click Connect.
4. Right-click on the server instance and choose Properties.
5. From the Select a page list, choose Security.
6. Click Add.



7. Enter the name of each BI user in the format, DomainName\Username and click OK.

   The names you have added are listed
8. Enter the name of the domain user you will use to run the BI Admin tool in the format DomainName\Username and click OK.
9. When you have added all the required users, click OK in the Analysis Server Properties window.

To set the Windows Firewall settings

If you are using Windows Firewall, you need to ensure that the Microsoft SQL database and Analysis Services programs are included in the firewall exceptions list:

- SQL Server (sqlservr.exe).
- SQL Analysis Services (msmdsrv.exe).

- If you are using named instances of SQL and Analysis Services, also include SQL Browser Service (sqlbrowser.exe).

1. Choose Start > Settings > Control Panel.
2. Open Windows Firewall.
   - If you are using Windows Vista, click Allow a program through Windows Firewall.
3. Select the Exceptions tab.
4. Add the SQL Server application to the exception list of allowed programs:
   a. Click Add Program, then click Browse.
   b. Browse to the program file for SQL Server - sqlservr.exe.

      Typically, this file will be located in Program Files\Microsoft SQL Server\MSSQL\Binn.
   c. Click Open then click OK.

      The program is added to the exceptions list.
5. Add the SQL Analysis Services application to the list of allowed programs:
   a. Click Add Program, then click Browse.
   b. Browse to the program file for SQL Analysis Services - msmdsrv.exe.
   c. Click Open then click OK.

      The program is added to the exceptions list.
6. Users running named instances of SQL and Analysis Services also need to add the SQL Browser Service program to the exception list of allowed programs:
   a. Click Add Program, then click Browse.
   b. Browse to the program file for the SQL Browser Service - sqlbrowser.exe.
   c. Choose Open then OK.

      The program is added to the exceptions list.

Set up the BI Administration tool

Before you start Sage 200 BI for the first time, you must use the Sage 200 BI Administration tool to build the cubes required for each Sage 200 company.

A cube holds every different available view point that can be used to analyse data. This means you can quickly and easily change the values displayed on a report.

To set up the Business Intelligence Administration tool, you must:

- Apply your report settings. This sets up the way Sage 200 BI works.
- Build your cubes.

Before using the BI admin tool

The BI cubes data is refreshed regularly. This data refresh is performed by Windows Scheduled Tasks. Changes made to the security system of Sage 200 v2010 mean that these tasks must be performed on the Sage 200 Application Server. You must install and use the BI Admin tool on the Sage 200 Application Server to create any new BI cubes.

Note: You must move any existing Windows Scheduled Tasks that refresh BI data, which exist anywhere other than the Sage 200 Application Server to the Sage 200 Application Server.

The user specified to run the Windows Scheduled Task must be either:

- A domain administrator, or
- A domain user who is both;
  - A local administrator on the Sage 200 application server and
  - An administrator in Analysis Services (see Microsoft SQL Server security settings).

Any domain user can run the BI Admin tool to upgrade a data warehouse from a previous version or manually refresh the cubes as long as they are an administrator in Analysis Services (see Microsoft SQL Server security settings).

As the BI data is generally refreshed overnight it is important the Sage 200 application server is powered on overnight so the Windows Scheduled Tasks can run.

Apply BI report settings

1. Choose Start > Programs > Sage Tools > Sage 200 > Sage 200 Business Intelligence Administration.
2. Enter your Logon name and Password, then click OK.

   The user must be a member of the Administrator role in Sage 200 System Administration.
3. On the Data Warehouse Configuration window, click Report settings.
4. Select the company settings that you want to change from the Company list.

   Note: If you edit any settings and then select a different company, the settings will be saved automatically.
5. On the General tab, use the Period and Year drop-down lists to select the default accounting period and year that you want to use for your reports.

   Note: If you leave the Period and Year boxes blank, the current date is used to determine the default accounting period and year.
6. Use the Month and Year drop-down lists to select the default calendar month and year that you want to use for your reports.

   Note: If you leave the Month and Year boxes blank, the current date is used to determine the default calendar month and year.
7. On the Nominal tab, use the drop-down lists to select the default financial statement layouts for your Balance Sheet and Profit and Loss reports.
8. On the Customers tab, in the Discount Bands boxes, type the lower percentage rate for each band. These must be in ascending order.

   Note: The discount bands are used to group settlement discounts on invoices. If you do not enter any discount bands, you will only see the Zero and >0% discount bands in your reports.

   For example:

   If you enter 2 for Band 1, 4 for Band 2 and 6 for Band 3, you will be able to select the following discount bands in the reports:

   - Zero, 0-2%, 2-4%, 4-6% and >6%.

   A discount of 2% will fall in the 0%-2% band and not the 2%-4% band
9. If you only want to bring through the Analysis Codes you have named, select Show Named Customer Analysis Codes Only and Show Named SOP Analysis Codes Only. Otherwise all Analysis Codes will be brought through to the cubes.

Note: If you have set up the Sage 200 Sales Ledger to use separate trading periods, you can select the default trading period you want to use for your reports. Select this from the Current Sales Trading Period drop-down list.

10. On the Suppliers tab, complete all the Discount Bands boxes as appropriate.
11. If you only want to bring through the Analysis Codes you have named, select Show Named Supplier Analysis Codes Only and Show Named POP Analysis Codes Only. Otherwise all Analysis Codes will be brought through to the cubes.

    Note: If you have set up the Sage 200 Purchase Ledger to use separate trading periods, you can select the default trading period you want to use for your reports. Select this from the Current Sales Trading Period drop-down list

12. On the Stock tab, select all the Search Categories as appropriate. You can use these for analysis on your reports.
13. If you only want to bring through the Analysis Codes you have named, select Show Named Stock Analysis Codes Only. Otherwise all Analysis Codes will be brought through to the cubes.
14. When you have entered all the required information, click Save.

    You can now create a data warehouse and build the cubes.

    Note: If you later change your report settings, you will only see the changes take effect after the cubes have been updated. The cubes will usually be updated by running a scheduled task, but if you want to update the cubes manually see To refresh cubes on page 89.

Build cubes for each company

Use the Sage 200 BI Admin Utility to build the cubes required for each Sage 200 company.

When you have done this, you can use the Data Warehouse Configuration window to perform tasks and apply various settings.

Create a new data warehouse

> **Important**
>
> This task must be carried out on the Sage 200 Application Server. You must be logged on to the server with a user that has administrator privileges.

To build the cubes for a company, you must add a new data warehouse for each company.

1. On the Data Warehouse Configuration window, click New warehouse.
2. From the Company drop-down list, select the first company you want to configure.
3. Enter a unique name for your Data Warehouse and Analysis Services cube in the respective boxes. Click OK. A Scheduler Security window appears.
4. Enter details of a windows user to run the Windows Scheduled Task.
    - If the Sage 200 Application Server is on the same machine as the SQL Server, select Use Local System Account.
    - If the Sage 200 Application Server is on a different machine to the SQL Server, enter a user who is either;
        - A domain administrator, or
        - A domain user who is both;
            - A local administrator on the Sage 200 application server, and
            - An administrator in Analysis Services (see Microsoft SQL Server security settings).

    A progress bar appears showing that all cubes are being updated. This process may take some time to complete.

    The data warehouse is created and the cubes are built. A scheduled task is created which rebuilds the cubes nightly at 3 am.
5. When the cubes have been updated, the Data Warehouse Configuration window appears.

Configure the data warehouse

The Data Warehouse Configuration window lists your Sage 200 companies.

In this window you can:

- Apply various report settings such as discount bands, analysis codes, report layouts and the financial period.
- Create a new data warehouse for a company.
- Change the details of the scheduled task, for example, the time and frequency of the cube update.

  Note: This task can only be carried out on the PC that is running SQL Server.

- Upgrade the data warehouse for the selected company.

  Use this when you have installed a new version of Sage 200.
- Refresh the cubes for the selected company.

  Use this if you have changed your report settings.

To create a new data warehouse

Note: You will lose your Sage 200 BI Aged Debt and Aged Credit snapshot information if you create a new data warehouse.

1. Click New warehouse to display the Custom Configuration window.

   From here you can change the data warehouse and Analysis Services cube for the selected company. If required, select a different company.
2. Using the Data warehouse and Analysis Services cube boxes, enter the required connection details.
3. To continue, click OK.

   A progress bar appears showing that all cubes are being updated. This process may take some time to complete

Set up a scheduled task

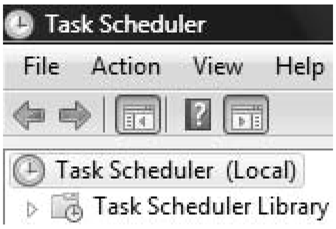
The Windows Scheduled Tasks must be run on the Sage 200 application server. For more information, see Set up the BI Administration tool on page 84

Note: Scheduled Tasks is a Microsoft product. For help on Scheduled Tasks, please refer to the Microsoft Windows help file.

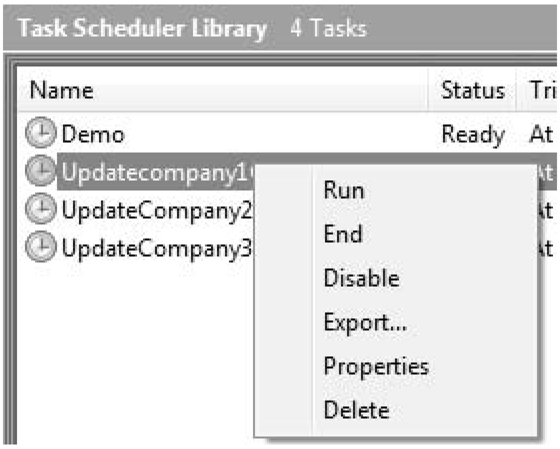
1. Click Schedule tasks to make changes to the scheduled task for the selected company. A window appears showing a list of scheduled tasks.
2. Right-click the task you want to edit and click Properties.
3. Make the required changes to the task and click OK.

If you are using Microsoft Windows Vista

1. Click Schedule tasks. The Task Scheduler appears.
2. From the left-hand pane, select Task Scheduler Library.



3. On the Task Scheduler Library list, right-click the task you want to change and choose Properties.



4. Make the required changes to the task and click OK. You can now edit your report settings.

To upgrade a warehouse

If you have installed a new version of Sage 200 and updated the company database, you will also need to update the corresponding warehouse database so that the version numbers of both databases match.

- Click Upgrade Warehouse to update the database version of the selected warehouse. This will also refresh the cubes.

To refresh cubes

Use refresh cubes to rebuild the cubes for a company. If you have changed your report settings, you must refresh the cubes for the changes to take effect.

- Click Refresh cubes to update the cubes for the selected company. A message appears showing the progress of the update.

  This may take some time to complete, depending on the size of the database.

Using BI in Sage 200

1. On the Sage 200 Navigation Bar, click Business Intelligence. The Sage 200 BI report folders appear at the top of the Navigation Bar.
2. Double-click on a report to open it in Microsoft Excel.

Report Types

Sage 200 BI provides standard and user defined reports. Reports in the user defined category can be used as templates for your own reports.

In a standard report, you can:

- Change the report title.
- Expand the row and column data on the report.
- Change the report criteria.
- Create charts that link to the report data.
- Sort and filter the information on the report.
- Apply row and column sub totals.
- Format cells whose values fall above, below or between specific values.
- Create several versions of the same report using different criteria.
- Apply Sage 200 BI formats to the report.
- Use the Report Layout panel and Report Layout wizard to change what is displayed on the report.

Troubleshooting BI

Changing your Sage 200 database

If you want to use a different Sage 200 database for your company, you must delete your existing warehouse and cubes and rebuild them.

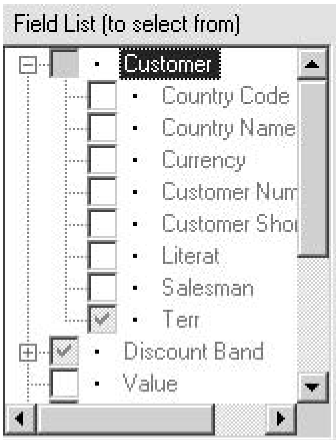
Placing analysis codes in reports

Report criteria appear at the top of the report underneath the report title and company name.

Customer Name	All Customers
Settlement Discount	All Discount Bands
Transaction Type	Invoices & Credit Notes

By default, analysis codes do not appear on standard reports as report criteria. You can, however, add them using the Field List (to select from) pane on the Report Layout panel.

- To place the analysis codes on the report as report criteria, select the check box next to relevant code.



- To place the analysis codes on the report rows or columns, click and drag the code from the Field List (to select from) pane to the Report Rows or Report Columns panes.
- To add the codes to the report, click Apply.

Note: For more information about the Report Layout panel, please refer to the Sage 200 BI help topic Report Layout.

Backing up and restoring BI databases

To backup or restore your Sage 200 BI warehouse database, as with Sage 200, use Microsoft SQL Server Management Studio.

The Sage 200 company database must remain in sync with the Sage 200 BI warehouse database and Analysis Services database. Therefore, if you backup or restore your Sage 200 company database you should restore the Sage 200 BI warehouse database and Analysis Services database at the same time.

Losing cube changes after an upgrade

If you customise your cubes (e.g. add new fields), those changes will be lost when you upgrade to a new version of Sage 200 BI or use the Upgrade warehouse option.

Error creating a scheduled task when not logged on as an Administrator

If your user account does not have administrator privileges in Windows XP or Vista, then an error may be displayed when you try to create a cube.

To resolve this, make sure that when you create the cube (and scheduled task) you are using an account with administrator privileges. You should also be logged onto the machine that hosts the Sage 200 application server when attempting to create cubes, to ensure that the scheduled task can communicate correctly with Sage 200.

Error running a scheduled task on Windows XP

If you are running a scheduled task on Windows XP, with a user name of the Administrator, the following error message may be displayed: LocalSystemAccount is not a trusted account.

To resolve this, change the user account running the scheduled task to the NTAUTHORITY\SYSTEM account.

This is a limitation with using Windows XP as a server.

Failed to link to database error

If you try to run a BI report and the message Failed to link to Database is displayed, this means Sage 200 BI cannot connect to the Analysis Services database.

This will appear if you do not have permission to access Analysis Services. For information on setting permissions, see Microsoft SQL Server security settings.

Fixed rows and columns

A report can have variable or fixed rows and columns. When a report has variable rows and columns, the report is redrawn each time it is changed. When a report with fixed rows and columns is changed, the report is recalculated but not redrawn. Some of the standard reports have fixed rows and columns. You can change these to variable rows and columns as follows:

1. Open the Report Layout Options window.
    - If you are using Excel 2007: On the Sage BI tab, click the File Group window launcher.
    - If you are using Excel 2003: From the Sage BI menu, select Edit > Report Layout, then click the Report Options icon  .
2. On the Report Layout Options window, select the General tab.
3. Select Variable Rows & Columns.

    Tip: To expand or hide report row or column data, double-click on the headings and select Allow drill down on Report.

4. Click OK.

Generating PDF files

It is not possible to save a report as a PDF file in Microsoft Excel 2003. You can, however, do this in Microsoft Excel 2007 using an installable component. For more information, please visit

http://www.microsoft.com/downloads/details.aspx?FamilyId=F1FC413C-6D89-4F15-991B-63B07BA5F2E5&displaylang=en

Re-enabling the Sage 200 BI Add-in in Excel

If Sage 200 Business Intelligence has problems connecting to the database and fails, it can become disabled as an add-in in Excel. The most common symptom of this is seeing the text #NAME in the report cells.To re-enable the add-in:

1. From the Start menu, select Program Files > Sage Tools > Sage BI > Enable or Disable Sage 200 Business Intelligence.
2. Select Enable.
3. Click OK.

Excel security warning when opening a report

When you open a BI report in Excel, you may see a security message warning you that the document contains macros.

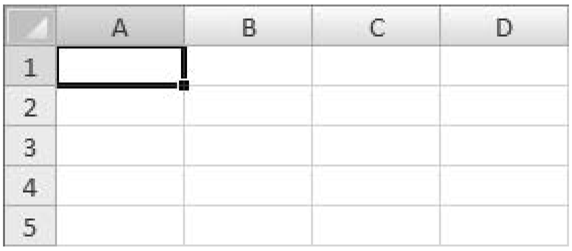
If you see this message, you must enable the macros for the BI reports to work correctly. To do this:

1. Select Always trust macros from this publisher.
2. Click Enable Macros.

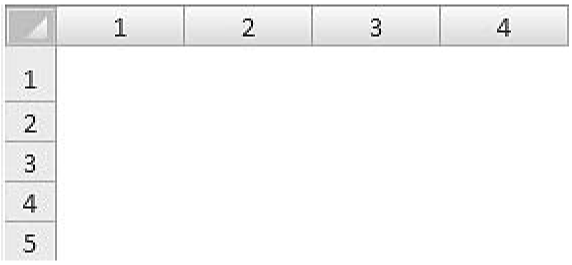
    This action should only be required once for any user on any particular PC.

Changing row and column referencing

Usually, in a Microsoft Excel worksheet, rows are numbered from 1 upwards and columns are lettered from A upwards.



Some worksheets use the ‘R1C1’ method of cell referencing where both rows are numbered from 1 upwards.



If you prefer to use the more common A1 style of referencing cells, it can be helpful to change the referencing style. You can do this as follows:

For Excel 2003

1. From the Tools menu, choose Options.
2. Select the General tab.
3. Clear the R1C1 reference style check box and click OK

For Excel 2007

1. Click the Office button then click Excel Options. The Excel Options window appears.
2. On the left-hand pane, click Formulas.
3. Under Working with formulas, clear the R1C1 reference style check box and click OK.

Manually creating a scheduled task to update the cubes

There may be occasions where you want to run a scheduled task to rebuild the cubes on a machine other than the Sage 200 BI server. In this case, you will need to create the scheduled task manually.

Important: Scheduled tasks should only be created on the machine that hosts the Sage 200 Application Server. This will avoid problems related to connection issues when the user is not present, as occurs with a scheduled task.

Note: The procedure below describes how to manually set up a task using Windows XP. There will be differences in this procedure when using other versions of Windows.

1. Choose Start > Settings > Control Panel.
2. Open Scheduled Tasks.
3. Open Add Scheduled Task. Click Next.
4. Click Browse.
5. Select the file Program Files\Sage\Sage200\ScheduledUpdateCubes.exe and click Open.
6. Enter a name for the task, then select to perform the task Daily.
7. Click Next.
8. Set the time when you want the cubes to be refreshed, then click Next.

   Note: It is advisable to rebuild the cubes on a daily basis outside of working hours so they do not conflict with any backup operations.

9. The task needs a user account to run as an Administrator user.

   See Before using the BI Admin tool.
10. Click Next.
11. Click Finish. The new task is added to the Scheduled Tasks.
12. Right-click on the task and select Properties.
13. Amend the path in the Run field as follows (changes in bold), where the number after /**n** corresponds to the company number in the Sage 200 BI Administration tool.

    C:\Program Files\Sage\Sage200\ScheduledUpdateCubes.exe /**n:1**
14. Click OK, then OK again to confirm the Run as window.
15. To ensure your new task has been set up correctly, right-click the task and select Run.

Unable to see the BI menu after running the BIEnableDisable tool

If you are using Microsoft Office 2003, there may be occasions where you cannot see the BI menu after you have run the BIEnableDisable tool. If the Load Behaviour status on the COM Add-Ins window is Load at Startup or Failed to Load at Startup, follow the steps below.

Note: This only applies to a report that has been launched from Sage 200 at least once.

If the Load Behaviour is Load at startup:

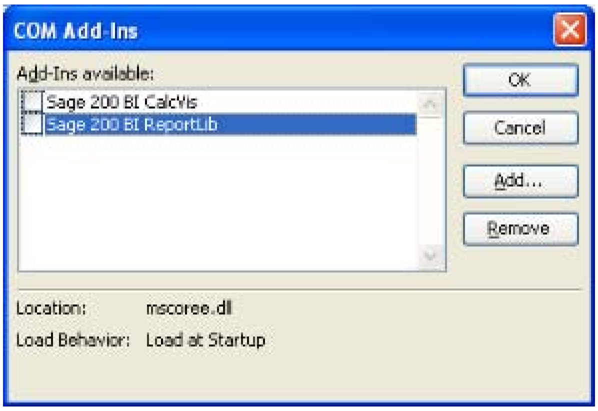
1. Open the COM Add-Ins window from the toolbar.

   If the COM Add-Ins option is not visible on your toolbar:

   a. Choose Tools > Customise from the toolbar.
   b. From the Command tab, select Tools from the Categories list.
   c. From the Commands list, drag COM Add-ins onto the toolbar.

2. Select Sage 200 BI CalcVis and Sage 200 BI ReportLib from the Add-Ins available list and click OK.

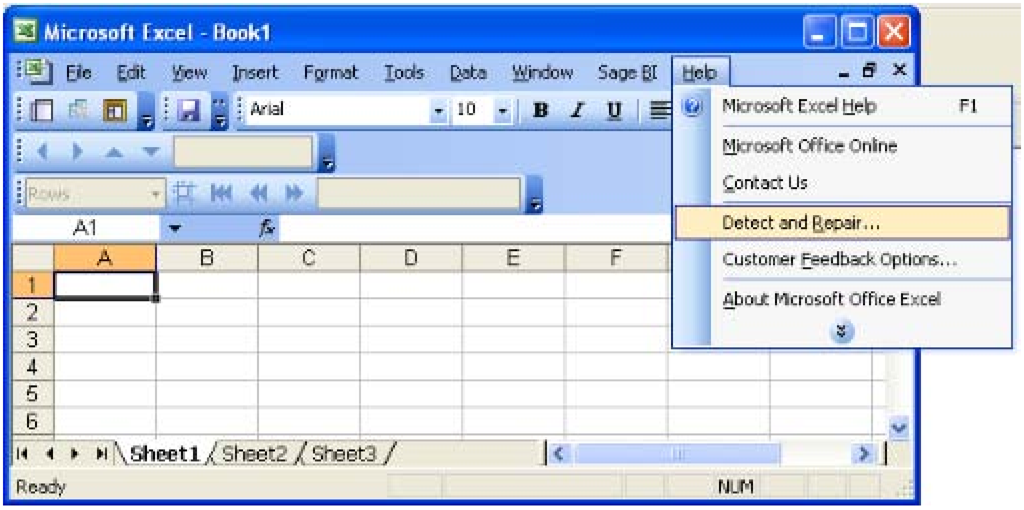
   If no add-ins are shown in the Add-Ins available list, run the BIEnableDisable tool.

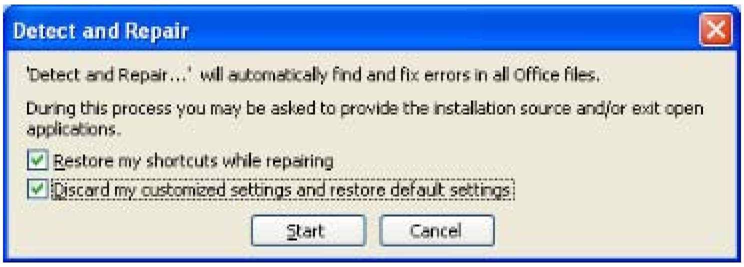
3. Close and re-open Excel. Check the Sage 200 BI CalcVis and Sage 200 BI ReportLib add-ins are visible and selected on the COM Add-Ins window.

4. If they are still not selected, choose Help > Detect and Repair from the Excel toolbar.

   You will need your Office installation source to run this process.

5. Select Restore my shortcuts while repairing and Discard my customized settings and restore default settings. Click OK.



6. When the process is finished, open Excel and the COM Add_in window. The Add-Ins available list should be empty.
7. Close Excel. Run the BIEnableDisable tool.
8. Open Excel and the BI menu will now be available.

If the Load Behaviour is 'Failed to load at startup':

1. Open the COM Add-Ins window from the toolbar.

   If the COM Add-Ins option is not visible on your toolbar:

   a. Choose Tools > Customise from the toolbar.
   b. From the Command tab, select Tools from the Categories list.
   c. From the Commands list, drag COM Add-Ins onto the toolbar.
2. Select Sage 200 BI CalcVis and Sage 200 BI ReportLib from the Add-Ins available list and click OK.

   If no add-ins are shown in the Add-Ins available list, run the BIEnableDisable tool.
3. Close and re-open Excel. Check the Sage 200 BI CalcVis and Sage 200 BI ReportLib add-ins are visible and selected from the COM Add-Ins window.
4. If the addins are not selected, and the Load Behaviour is Failed to load, you must uninstall the following programs:

   a. Sage 200 Buisiness Intelligence.
   b. Primary Interop Assemblies.
   c. VSTO Runtime SE.

   Note: You must be logged in as the System Administrator.
5. Re-start your PC.
6. Install Sage 200 BI Excel Client.
7. Open Excel and check the add-ins are selected on the COM Add-Ins window.
8. Close and re-open Excel. The BI menu will now be available.

Sage BI Admin tool takes a long time to open on a PC with no internet access

If you are running the Sage 200 BI Administration Tool on a machine that does not have internet access, it can take up to two minutes to open.

This occurs because the BI Admin tool needs to run with administrative credentials on Windows Vista. In order to ensure a secure connection, the tool attempts to checks for revoked certificates online.

To speed up opening the Admin tool, it is possible to turn off this check.

Important: This setting should only be changed on a PC that does not connect to the internet. If the PC is later connected to the internet, the original setting must be restored.

1. Open Internet Explorer.
2. Select Tools > Internet Options > Advanced.
3. Scroll down the Settings list to the Security section.
4. Clear the checkbox for Check for publisher's certificate revocation.
5. Click OK and close Internet Explorer.

Company name and time not updated in a modified standard report

A modified report is a standard report that has been changed and saved.

These modified Sage 200 BI reports may display the incorrect company name and time if:

- You open a standard BI report from the Sage 200 menu bar and save a modified copy.
- Next time, you open the modified report in Excel.

The company name and time information on the modified report will not be refreshed in the version displayed in Excel. The report will still show the company, date and time information from the previous time that the report was created.

Note: The data in the report will be correct.

To avoid this problem, we recommend that you run your modified reports from the Sage 200 menubar.

Profit & Loss and Balance Sheets layouts with the same name

If you have Profit & Loss and Balance Sheet layouts with the same name:

- You cannot refresh your data cubes.
- These reports will show the same categories (i.e. they will show the same information).

To display the correct information, the default financial statement layouts in Sage 200 must have different names.

You set up this name in the Report Settings >Nominal tab.

Data not populating 'As At' date when creating a Data Warehouse

When the data warehouse is populated (either via a data warehouse update or a refresh), a 'snapshot' of that data is recorded and stored for the Sales Order and the Stock Level cubes.

If the date of the data extract is not in the financial year defined for Sage 200, the data warehouse will not be populated with Sage 200 data.

A message will be written to the data warehouse audit trail (in the AuditHeader and AuditDetail tables) to inform you that the update has failed.

BI Welcome page is not displayed in Sage 200 after upgrading

If you upgrade an existing Sage 200 installation with BI, some users may discover that they cannot see the Sage 200 desktop Welcome page for the Business Intelligence group.

The solution to this problem requires editing an XML file, so the modification should be carried out by someone with appropriate technical knowledge, and ideally by your Business Partner during installation.

To display the Welcome page, the PortalGroup(nnn).xml file for your particular user group must be modified to include the BI options.

The new BI options are automatically included in the file PortalGroup999.xml file and take the form:

```
<portletgroup version="4.0.0.0" groupname="Business
Intelligence" defaultType="welcome"><portletgroupform
id="BI.WelcomePage"/><portletgroupform
id="BI.ProcessMap"/></portletgroup>
```

The BI demo does not play correctly

In order to view the BI demo that is accessed from the Sage 200 Welcome page, Adobe Flash Player must be installed on your PC. If Adobe Flash Player is not installed, you may either be prompted to install Flash player, or just see a blank window.

If you just see a blank window when attempting to view the demo, and are not prompted to install Flash Player, it can be installed from the Adobe website (http://get.adobe.com/flashplayer/).

The filters do not display on the report

This can occur if you have entered conflicting criteria for your filters using attributes from the same dimension. For example, you have a filter for both country code and country name on the same report. You select a country code and then select a different country name.

To resolve this, open the report layout to change the filters.

Customised reports showing out of date information

Whilst loading a new or customised report, BI will display the data that was current when the report was created or customised. This may not reflect the current accounts data.

Once the report has been fully loaded, this situation will be corrected and BI will display the most up-to-date information.

Report layout screen apepars by default

The Report Layout Screen may appear when a report is loaded. Close this screen if it is not needed. This does not affect the data in the report.

Adding filters to reports

When attempting to add a filter via the Report Layout Wizard, the Addin may restore the previous query and continue. When this occurs a message box appears.

Unexpected results from the Inactive Supplier and Inactive Customer Reports

The Inactive Supplier and Inactive Customer reports measure activity based on transaction period, rather than transaction date.

If a customer or supplier has a transaction in a recent period, they will not be flagged as inactive.

FAQs: Business Intelligence

Can I run the same report in different companies?

You cannot do this if the companies have a different nominal ledger structure or different sales analysis codes. If you have selected a field, such as Customer, for one company and you then select a different company that does not have that field, the report will reset itself.

How do I send reports to non Sage 200 BI users?

You should:

1. Change the report type to static.
2. Save the report then send it to the user.

How do I change my report type?

There are two types of report: dynamic and static. All Sage 200 BI reports are dynamic - they consist of a range of formulas and styles. A static report has no formulas, styles or formatting. However, you can apply Microsoft Excel styles and formats to a static report.

To change the report type to static

- Right-click any cell in the report and choose Report Type > Static.

To change the report type to dynamic

- Right-click the report title cell (the top left cell of the report) and choose Report Type > Dynamic.

How do I save or change a report?

The Sage 200 BI standard reports are read-only. You can make changes to the reports and save them using the Microsoft Excel Save As command.

Note: There is no guarantee that any customised reports will work with future versions of the software. This is because the structure of the cubes may change.

You must save an edited report with a unique name.

When I update my cubes, can I see a log of events?

You can use Windows Event Viewer to see when you have performed a cube update.

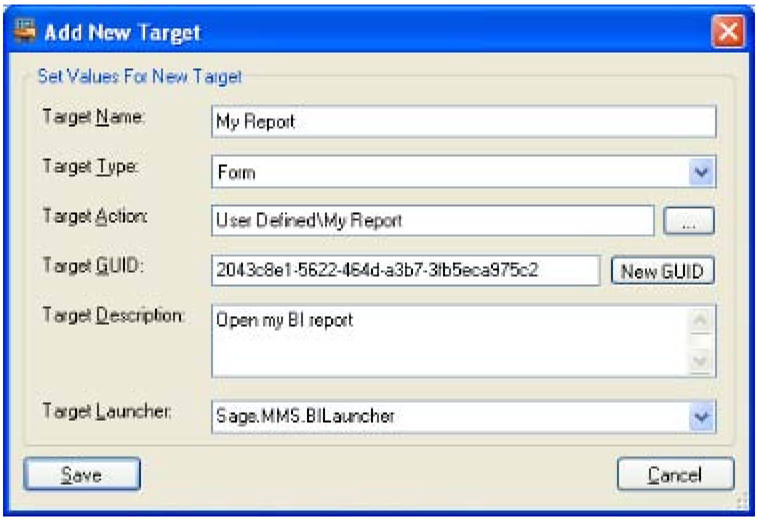
The Event Viewer displays this information in the 200 BI Diagnostics area; or, if using Windows Vista, in Application and Service Logs \ Sage 200 BI Diagnostics.

How do I add a report to the menu?

Before you add a report to the Sage Business Intelligence menu, you should ensure that the report resides in the location where the reports are installed. By default, this is C:\Sage\Reports\Business Intelligence followed by the relevant folder, e.g. User Defined.

Add a new feature in System Administration

1. Choose Start > Programs > Sage Tools > Sage 200 > System Administration. The Logon window appears.
2. Enter your logon details and click OK. The System Administration window appears.
3. From the Navigation bar, click Features.
4. Open the BI Reports folder.
5. Right-click the User Defined folder, and select Add New Feature.
6. Enter the Name. Click New GUID to enter a GUID for the feature.
7. Click OK to add the new feature.
8. To ensure the new feature has appropriate authorisation, right-click the feature and select Role Authorisation. Add the required roles as authorised roles and click OK.
9. Select the new feature, and in the Feature Properties pane select the Targets tab and click Add. The Add New Target window appears.



10. Enter a Target Name.
11. Set the Target Type as Form.
12. For the Target Action, type the path to the report file in the reports folder, without including the .xls file extension.

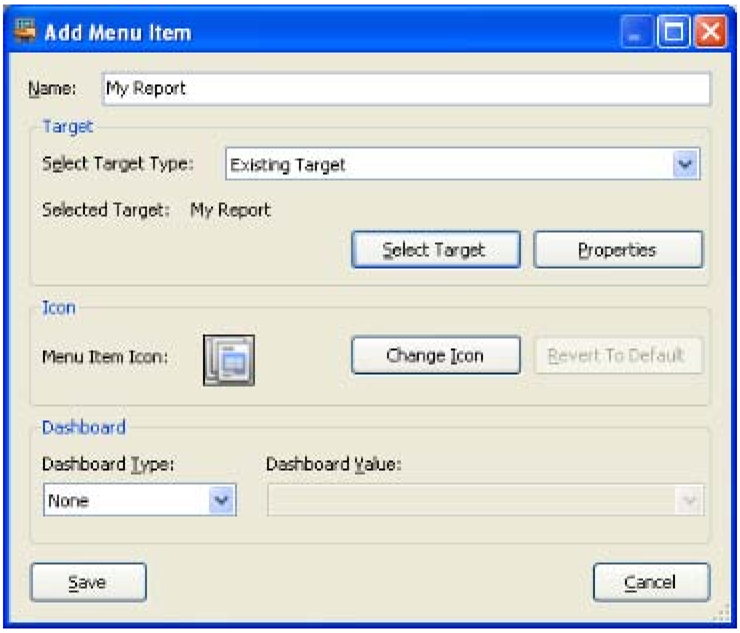
For example, say your report is located in Sage\Reports\Business Intelligence\User Defined\My Report.xls. For the Target Action, you would just enter User Defined\My Report.

Note: You cannot use the browse (...) button to select the path to the report.

13. Click New GUID to enter a Target GUID.
14. Enter a Target Description.
15. Set the Target Launcher as Sage.MMS.BILauncher.
16. To save the target properties, click Save.
17. You can now close the System Administration. Next add a new menu item for this feature in Sage 200.

Add a new menu item in Sage 200

1. Open Sage 200.
2. Click Tools > Menu Design Mode.
3. Locate the Business Administration menu.
4. Right-click the User Defined folder, and click Add Menu Item. The Add Menu Item window appears.



5. Enter the menu item Name.
6. Select the target type as Existing Target.
7. Click Select Target.
8. Select the target you created in System Administrator, this will be located in BI Reports.
9. Click Save to save the menu item.

10. Click Save and then click Close to exit the Menu Design Mode. Your report will now be available from the BI menu in Sage 200.

How do I delete the Data Warehouse and Analysis Services databases?

1. Open the Sage 200 BI Admin Utility.
2. On the Data Warehouse Configuration window, highlight the appropriate Sage 200 company. Press the Deletekey.
3. You will be prompted to confirm deleting the Data Warehouse and Analysis Services databases for the company. Click Yes to delete the databases.
4. You will then be prompted to confirm whether you want to delete the report settings for the company. If you intend to recreate the databases, you may want to click No and keep the report settings.

How do I remove the drill indicator in Microsoft Excel 2007?

In Sage 200 BI with Microsoft Excel 2007, cells that allow you to expand or hide information have the following indicator:

If required, you can remove this:

1. On the Microsoft Excel ribbon, select the Home tab and in the Styles group, click Cell Styles.
2. Right-click IAParentRowHeader or IAParentColumnHeader and choose Modify. The Style window appears.
3. Clear the Number check box and click OK.
4. To apply the change, click Report Layout on the SageBI tab.
5. On the Report Layout panel, click Apply.

7

Set up Sage 200 Manufacturing

Once you have installed Sage 200 Manufacturing, you must complete the following set up tasks:

- Set up Manufacturing in Sage 200 System Administration.
- Set up the Manufacturing modules in Sage 200.
- If you have installed Sage 200 Graphical Planner, you must register and activate it.

For information on how to install Sage 200 Manufacturing, see Installing the Sage 200 Suite for the first time on page 39.

For information on upgrading an existing installations of Sage 200 Manufacturing, see Upgrading to Sage 200 Manufacturing v2010 on page 155.

Important:

If you are using Bill of Materials with Manufacturing

Manufacturing is being extensively redeveloped and this process is not yet complete.

Consequently, some of the information that you can enter and use in the Bill of Materials module now, cannot be used yet in the Estimating, Planning and Works Orders modules.

If you are using, or plan to use all Manufacturing modules, you must follow these guidelines for operations that you add to the BOM record.

Note: If the BOM record has been created by converting a one-off works order into a BOM, an operation resource is added to the BOM record automatically. Do not rename this operation. If you do, you will not be able to update information between the BOM and the Works Order.

- On the operation record Details tab, do not use the Overlap Quantity or enter seconds values for the resource.
- On the operation record Resources tab, do not enter seconds values for the resource. Ensure that you add only the following resources with the following settings:

Phase	How many Resource Types?	Resource Type	Primary/Secondary	Fixed Length
Setup	One	Select either a *Machine Resource* or a *Machine Resource Group*.	Select either *Primary* or *Secondary*.	You must select Fixed Length for the resource.
Runtime	Three	Select one *Labour Resource* or *Labour Resource Group*. Select one *Machine Resource* or *Machine Resource Group*. Select one *Tool Resource* or *Tool Resource Group*. **Note:** Only select a tool resource or resource group if you have also selected a labour and a machine resource or resource group.	Select Primary for your labour Resource Type and Secondary for your machine Resource Type or vice versa. **Note:** Do **not** select either Primary or Secondary for your tool Resource Type selection.	Do not select Fixed Length for the resource or resource group.
Teardown	None			

- On the operation record Subcontract tab, add only one supplier and no more than five quantity breaks. The supplier must use base currency.

Set up Manufacturing in Sage 200 System Administration

Before you can access the Manufacturing modules from within Sage 200, you must authorise the Manufacturing features for the appropriate roles within Sage 200 System Administration.

For example, if you want user Nigel to access all of Manufacturing:

- Create the user *Nigel*.
- Assign a role to the user *Nigel*. This can be a specific *Manufacturing* role.
- Enable all the manufacturing features for the role.

If you want user Danny to access only the estimating module:

- Create a user *Danny*.
- Assign a role to the user *Danny*. This can be a specific *Estimating* role.
- Enable the Estimating features for the role.

For more information about users, roles and authorising features for roles, see the Sage 200 System Administration help.

To enable the Manufacturing features in System Administration

1. Choose Start > All Programs > Sage Tools > Sage 200 > System Administration.
2. Enter the Manager Logon name and Password. Click OK.
3. From the Navigation Bar, select Roles.
4. Select a Role that you want to use for Manufacturing. Right-click and select Features.
5. Select the relevant Manufacturing features.

   The Manufacturing features are arranged according to the individual modules. These are Bill of Materials, Manufacturing System Manager, Estimating, Planning, Works Orders.
6. Click OK.

Setting up Manufacturing in Sage 200

Before you begin to process data, you must set up the Manufacturing modules to work in the way that you want.

The following suggests a typical setup sequence. The setup sequence you use depends upon the nature of your business and how you intend to use your Manufacturing software. Therefore, you should adapt the checklist to your requirements.

We recommend that you:

1. Identify those parts of the setup sequence that apply to you.
2. Follow the suggested setup sequence in the set up.
3. Set up your system accordingly.

Operation Times is an additional Manufacturing module which puts you in charge of your Manufacturing shop floor operation times. It runs alongside the Works Orders module. To run Operation Times, click on the Sage 200 Manufacturing Operation Times shortcut in the folder where you have installed Sage 200. You can copy the shortcut to your desktop. The Operation Times application can only be run on a PC that has Sage 200 Accounts and Manufacturing installed. It cannot be run 'standalone' on a separate PC.

For more information about how to set up the Manufacturing modules, see the Sage 200 help.

For information about how to process data in Manufacturing, see the *Processing data in Manufacturing* topic in the Sage 200 help.

Note:
Manufacturing operations contain details relating to labour and machine processes. You can set up operation details for individual BOMs or estimates. But, if you plan to use the operations regularly across a range of finished items, you should first set up and store the details within the Operations Register. You will significantly reduce the time spent setting up BOMs or estimates later.

Note:
The following characters are supported in the Bill of Materials module, but not in other Manufacturing modules:

Apostophe (')

Quotation (")

To set up Manufacturing

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. **Important** If you are using or planning to use Bill of Materials with all Manufacturing modules you must follow the guidelines for Setting up Manufacturing in Sage 200 on page 1 .
7.	Enter details in the Drawing Register.
8.	Set up expense categories.
9.	Set up labour categories.
10.	Set up employee details.
11.	Set up non-chargeable time categories.
12.	Review and amend non-working periods.
13.	Set up Bill of Materials.
14.	Set up Estimating.
15.	Set up MPS (Master Production Schedule).
16.	Set up MRP (Materials Requirements Planning).
17.	Set up Works Orders.
18.	Add BOMs. **Important** If you are using or planning to use Bill of Materials with all Manufacturing modules you must follow the guidelines for Setting up Manufacturing in Sage 200 on page 1 .

Working with Sage Graphical Planner

Manufacturing has integrated a Graphical Planner module from Preactor® International. This enables you to analyse and run resource plans for all demands within your Manufacturing program. You install Graphical Planner as part of the Sage 200 Suite installation.

This section describes what you need to do, once you have installed Graphical Planner. You must:

- Register as a Graphical Planner user.
- Install Preactor's Licence Site Manager.
- Activate and access Graphical Planner.

For more information about using Sage Graphical Planner, see the Sage 200 help. Search the help for the *Graphical Planner* topic. From here you will find all the information you need to move around Graphical Planner.

Important! The Preactor copyright and licence agreement should be considered to be contained within the Sage End User Licence Agreement.

Register as an end user

Note: You do not need to do this if you are upgrading Graphical Planner.

Before installing Graphical Planner, your BP must register your company as an end user. Preactor® International needs this information to issue you with a site licence. **The site licence is specific to the computer network you install and run Graphical Planner from.**

Important: Your BP must use this procedure to install Graphical Planner for Manufacturing.

To begin, you must fill in the request form located on sage.co.uk.

To help you register, follow the procedure below.

To register as an end user

1. Login to the Support area of www.sage.co.uk.
   - From the Navigation Bar, select Support & Training.
   - Log in using your Sage login details.
2. Select Downloads Home.
3. Select Support guides.
4. From the drop-down list, select Sage 200 Manufacturing and click Go.
5. Select Graphical Planner Registration Form for Sage 50/200 Manufacturing.
6. Click Download. The File Download prompt appears.
7. Click Open to view the End User Contact Registration Form.
8. Save the form to your hard drive.
9. Fill out the form. You must include all of the information in the mandatory fields (marked with an asterisk).
10. Attach the completed form to an email and send this to *reseller.services@sage.com*.

    Upon receipt, Preactor will send you your registration information.

    Note: The licence key and account number are emailed to the user email address which you have entered on your registration form. We recommend that you keep this information in a safe place.

Install Preactor License Site Manager

Note: You do not need to do this if you are upgrading Graphical Planner.

You must install a license site once you have installed Graphical Planner for the first time.

The License Site folder contains the licence number and account number needed to install Graphical Planner.

If you want to run Graphical Planner across a network and use the program from different workstations, install the License Site Manager on the *Server*. The Graphical Planner path will continue to use the local workstation.

There is an issue with installing Graphical Planner's License Site Manager. If you attempt to use the Licence Site Manager, a Preactor Licence Site Manager Stopped Working message appears. This is because the latest version of Licence Site Manager does not work with .NET 3.5. The Sage 200 suite uses .NET 3.5. You will be unable to use the Licence Site Manager until you have installed the hotfix.

The hotfix can be installed from here:
http://kb.preactor.com/KnowledgebaseArticle10120.aspx

Once you have installed the hotfix, you will be able to use the Licence Site Manager.

Note:
Any further workstation installations must also use the same License Site folder on the Server. Only one person can log on and use Graphical Planner at a time. If you need more users, contact the Sage Customer Development Team directly to discuss your licence requirements or upgrade your licence.

To install the license site manager

1. From your windows desktop, open the Start menu and then choose Programs > Sage > Graphical Planner > Utilities > License Site Manager.

   The Preactor License Site Manager window appears.
2. Select Tasks > New > License Site. The Welcome to the New License Site Wizard window appears.
3. Click Next. The License Site Details window appears.
4. Perform the following:
   - Click Browse and select the folder where the License Site is to be installed.

     For example, *C:\Documents and Settings\(Window's domain account name)\My Documents\Sage\Graphical Planner*.

     The License Number and Account Number boxes become active.

Note: Once the license site is installed, you must use the License Site Manager to activate, update, move or delete a site. The license site becomes invalidated if the License Site Manager is not used.

When selecting a location for your license site, ensure that the path has no more than six folder levels. A message is displayed if the path is too long.

- Enter the Account Number and License Number.

5. Click Next. The License Site Name window appears.
6. Enter a name for the license site that will appear in the License Site Manager window.

   Note: Select Set as default license site to set this license site as the default in the License Site Manager window.

7. Click Next. The Completing the New License Site Wizard window appears.
8. Click Finish. The Preactor License Site Manager window appears, displaying the new license site folder.

Activate the license

Note: You do not need to do this if you are upgrading Graphical Planner.

Now that you have registered your product, installed Graphical Planner onto your computer and have created the license site, you are ready to activate the license.

To activate the license

1. From your windows desktop, open the Start menu and then choose Programs > Sage > Graphical Planner > Utilities > License Site Manager.

   The Preactor License Site Manager window appears.
2. Right-click the site you want to activate.
3. Select Request License Activation/Update from the menu. The Preactor license update request window appears. Your licence details are added to the email message automatically.
4. Click Send to send the license update request to Preactor. A *Sage Graphical Planner License Activation/Update* email is sent to you.
5. Complete the activation process by performing the following:
   - Save the attached file to your desktop and double-click it.

     Note: You may experience problems saving the attachment if you are using Outlook WebAccess email clients.The file appears to be saved correctly but fails if you double-click on it. To solve this problem, use a different email client to retrieve the document. As this emailed response is automatically generated and is a non-monitored email account, contact your local support representative for more information.
   - The license activation process (Copy Control Update window) is launched. Your license site is updated and a summary is displayed showing the results.

     If the update process fails, click Email Support to email Technical Support with the details of the problem.

     If the process is successful, click Exit. Graphical Planner is now activated.
6. Delete the desktop file. A confirmation message appears.
   - Click Yes. The file is deleted.

Accessing Graphical Planner

You can access Graphical Planner in the following ways from within Manufacturing:

- Manufacturing Controller > Planner > Links > Graphical Planner.
- Works Orders > Graphical Planner.
- Planning > MRP > Graphical Planner.

Tip:
You can create a short cut of Start > Programs > Sage Graphical Planner.

When creating a short cut, you must add *(space) "Preactor.prcdf"(space)/DAB* to the shortcut’s Target path.

For example, Target: C:*(location of license site key)*\PREACTOR.EXE" "Preactor.prcdf" /DAB

8

Set up Sage 200 Wholesale and Retail

Once you have installed Sage 200 Wholesale and Retail, you must complete the following set up tasks:

- Set up Wholesale and Retail in Sage 200 System Administration.
- Set up the Wholesale and Retail module in Sage 200.

For information on installing Sage 200 Wholesale and Retail, see Installing the Sage 200 Suite for the first time on page 39.

For information on upgrading an existing installation of Sage 200 Wholesale and Retail, see Upgrading to Sage 200 v2010 on page 151.

Set up Wholesale and Retail in Sage 200 System Administration

Before you can access the Wholesale and Retail module from within Sage 200, you must authorise the Wholesale and Retail features for the appropriate roles within Sage 200 System Administration.

For more information about users, roles and authorising features for roles, see the Sage 200 System Administration help.

To enable the Wholesale and Retail features in System Administration

1. Choose Start > All Programs > Sage Tools > Sage 200 > System Administration.
2. Enter the Manager Logon name and Password. Click OK.
3. From the Navigation Bar, select Roles.
4. Select a Role that you want to use for Wholesale and Retail. Right-click and select Features.
5. Select the relevant Wholesale and Retail features.
6. Click OK.

Set up Wholesale and Retail in Sage 200

Before you begin to process data, you must set up the Wholesale and Retails module to work in the way that you want.

1. Enter your Wholesale and Retail settings.

   Open: Wholesale and Retail > System Set Up > Set Up.

2. Set up your company hierarchy.

   Open: Wholesale and Retail > System Set Up > Company Hierarchy Set Up.

3. Set up your merchandise hierarchy.

   Open: Wholesale and Retail > System Set Up > Merchandise Hierarchy Set Up

4. Set up your store details.

   Open: Wholesale and Retail > Company > Maintain Store Attributes.

5. Set up your merchandise details.

   Open: Wholesale and Retail > Merchandise > Merchandise Hierarchy.

6. Set up your promotions.

   Open: Wholesale and Retail > Promotions > Enter New Promotion.

9

Installing and setting up Sage 200 CRM for the first time

Use the instructions in this chapter to install Sage 200 CRM v2010 and configure the integration between Sage 200 v2010 and Sage 200 CRM.

If you have an existing installation of Sage 200 CRM, you must follow the instructions for Upgrading Sage 200 CRM to v2010 on page 163.

This chapter covers:

- Installing Sage 200 CRM v7.0 SP1 (Sage 200 v2010).
- Setting up the integration between Sage 200 CRM and Sage 200.
- Setting up Sage 200 CRM in the Sage 200 System Administration tool.
- Setting up Sage 200 CRM in Sage 200.
- Setting up Sage 200 CRM.

This chapter also contains a troubleshooting section which covers some issues you may need to be aware of when installing Sage 200 CRM.

Prerequisites

To install Sage 200 CRM and integrate with Sage 200 you must have:

- Installed Sage 200 v2010 File Server
- Installed Sage 200 v2010 Application Services
- Installed Sage 200 v2010 Client
- Microsoft SQL Server 2005/2008
- Microsoft Internet Information Services (IIS) version 6.0 or above.
- A valid license key.

The license key takes into account your company name. Care must be taken during the installation to enter this information correctly.

Please see the System requirements and prerequisites on page 3 for information about the minimum specifications required for your system.

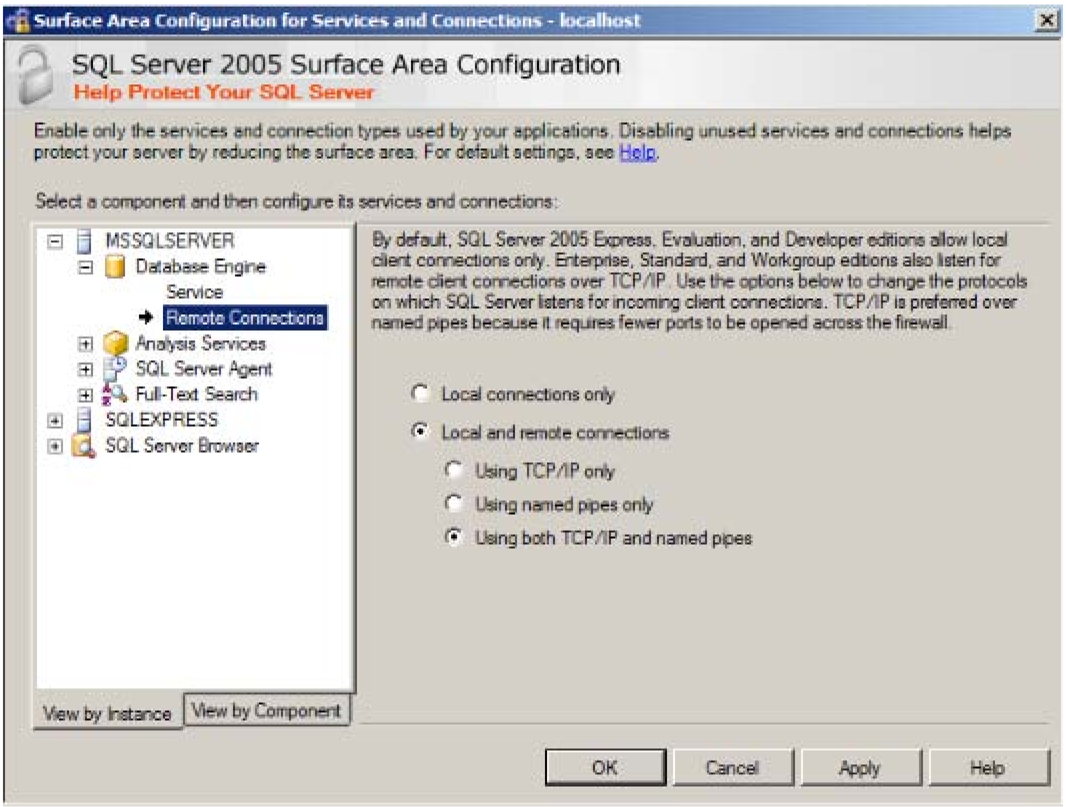
Setting up your SQL Server for Sage 200 CRM

Before you can install Sage 200 CRM v2010 you must:

- Change your SQL server settings.

To change SQL server v2005 settings

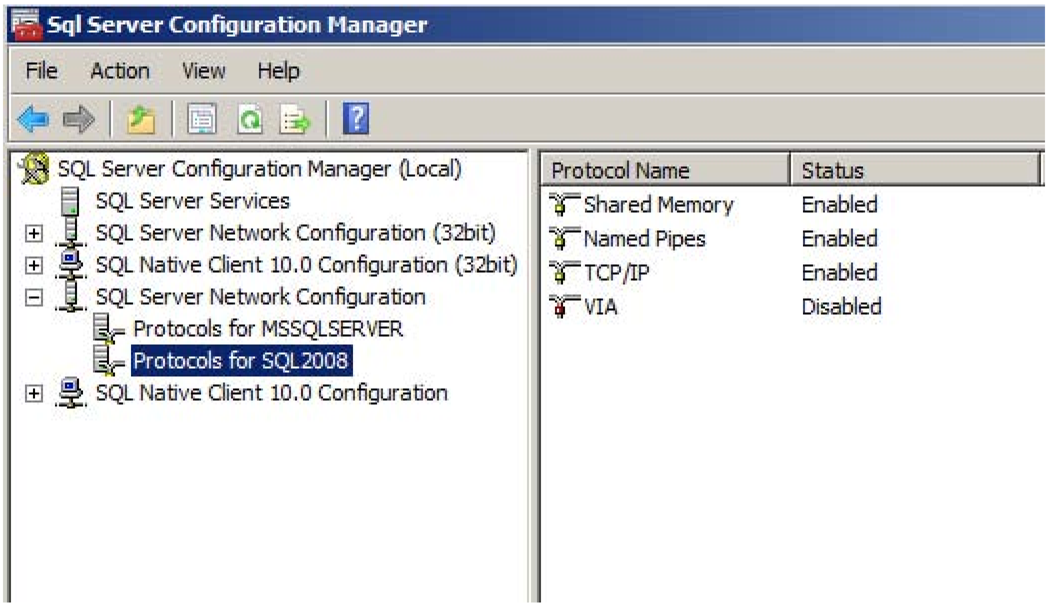
1. Select Start > Programs > SQL Server 2005 > Configuration Tools > SQL Server Surface Area Configuration.
2. Select Surface Area Configuration for Services and Connections.



3. Select SQL2005 > Database Engine > Remote Connections.
4. Select Local and Remote connections and Using both TCP/IP and named pipes.
5. Click OK.

To change SQL Server v2008 settings

1. Select Start > Programs > SQL Server 2008 > Configuration Tools > SQL Server Configuration Manager.
2. Select SQL Server Network Configuration > Protocols for SQL 2008.



3. Make sure TCP/IP and Named Pipes are enabled.

Install Sage 200 CRM

1. Open the Sage 200 CRM folder from the Sage 200 DVD. Run the setup.exe. Click Next to continue.
2. Accept the Software License Agreement. Click Next to continue. The User Details screen appears.
3. Enter your Name, Company name and License key.

   The company name and license key must be entered in exactly the same way as provided to you by Sage.

   Click Next to continue. The Database Selection screen appears.
4. Choose Existing Microsoft SQL Server. Click Next to continue. The Installation Name screen appears.
5. Enter the installation name. We recommend that you use the default installation name, CRM.

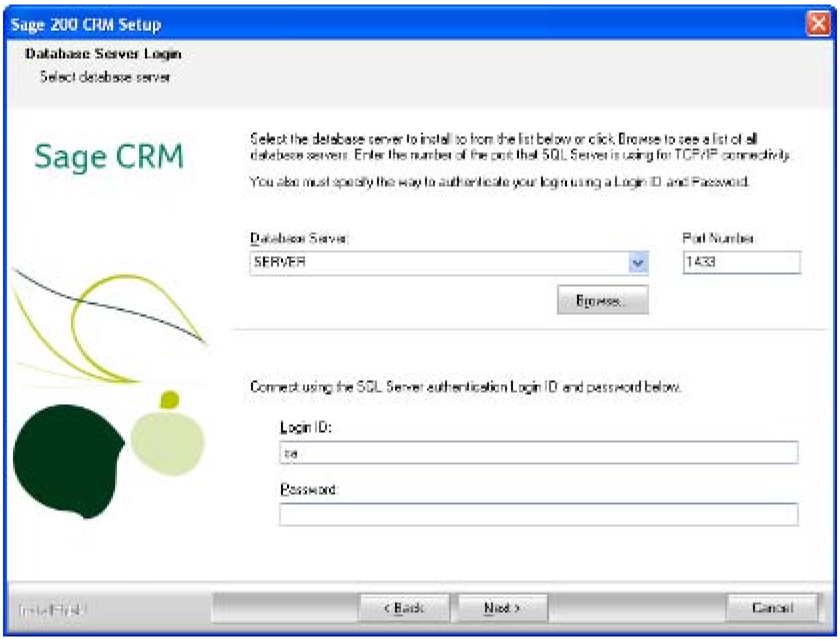
   If you enter an alternative name, please make sure there are no spaces in the name.

   Note: The SQL server needs to have a case insensitive collation. A binary collation, or a case sensitive collation, is not supported.

   Click Next to continue. The Choose Destination Location screen appears.
6. Enter the location for the CRM program files. The default location is C:\Program Files\Sage\CRM.

   IIS looks in this location for the CRM home page.

   Click Next to continue. The Database Server Login screen appears.



7. Check that your Database Server name is correct.

8. Enter the TC/IP Port Number.

   If your SQL instance is the default instance, the port number will be entered by default. This is usually 1433.

   If you are using a named SQL instance, you must enter the correct port number. To find the TC/IP port number, see the following Microsoft Knowledgebase article: http://support.microsoft.com/kb/265808.
9. Check your SQL Server user Login ID is correct.
10. Enter the Password for this SQL server user ID.

    Click Next to continue. The Select Setup Type screen appears.
11. Select No demo data.

    Click Next to continue.
12. Do not select Sample Self Service support site.

    Click Next to continue. The Default Currency screen appears.
13. Select a Default currency from the list. If your default currency is not displayed on the list, click New.
    - Enter the Currency name.
    - Enter the internationally recognized Currency symbol code. Click OK. The new currency is displayed in the list.

    The default currency is displayed in a read-only format against all currency type fields in Sage 200 CRM. If your implementation deals with multiple currencies, this forms the Base Currency against which all other currencies are calculated.
14. Click Next to continue. The CTI settings screen may appear. Click Next to continue.
15. Check the current install settings.

    Click Next to continue.
16. The CRM installation begins. When the installation is complete, select Finish to complete the installation process.

    The Readme file appears. When you close the Readme file, the Logon page appears.

Set up the integration between Sage 200 CRM and Sage 200 for the first time

Important

This section should only be used if you are setting up an integration between Sage 200 Accounts and Sage 200 CRM for the **first** time.
If you are upgrading from a previously integrated system, see Upgrading Sage 200 CRM to v2010 on page 163.

Before you can start using Sage 200 CRM with Sage 200 you must complete the following tasks in the Sage 200 System Administration tool, Sage 200 and Sage 200 CRM:

In the Sage 200 System Administration tool you must:

- Create a new user account for the CRM Integration.
- Create a new role for the CRM Integration.

  The role must be set up as Remote Users Access Only. The CRM user account must be added to this role.

In Sage 200, you must:

- Set up a customer account for your CRM prospects.
- Enter your CRM integration settings in Sage 200.

In Sage 200 CRM you must:

- Create a new integration in Sage 200 CRM.
- Set up and enable the new integration.
- Start the CRM Integration Service.
- Synchronise the data.

Set up Sage 200 CRM in System Administration

The Sage 200 Integration Service accesses Sage 200 Accounts using a specified Sage 200 user account and password.

We recommend that you create a new dedicated user account in System Administration that will deal solely with the integration.

Create a CRM user in Sage 200 System Administration

1. Log on to Sage 200 System Administration.
2. Select Users from the Navigation bar.
3. Right-click and select Add New User.
4. Enter a Logon Name and Password for the user.
5. Click OK. The Added User Properties appears.
6. Select the General tab. Select User Enabled.
7. Select the Company Access tab.
8. Select the company that the integration is for.

   Use the arrow keys to move the company to the Selected Companies list.

   Note: It is possible to allow this user to have access to each company by selecting the Access All Companies checkbox.
   We recommend that there is one user set up for each company. This ensures that the system doesn't use the same user for different company synchronisations at any one time.

9. Click OK. As the user is not assigned to a role at this point, a warning message will appear.
10. Click Yes to accept the message. We will assign the role in the next section.

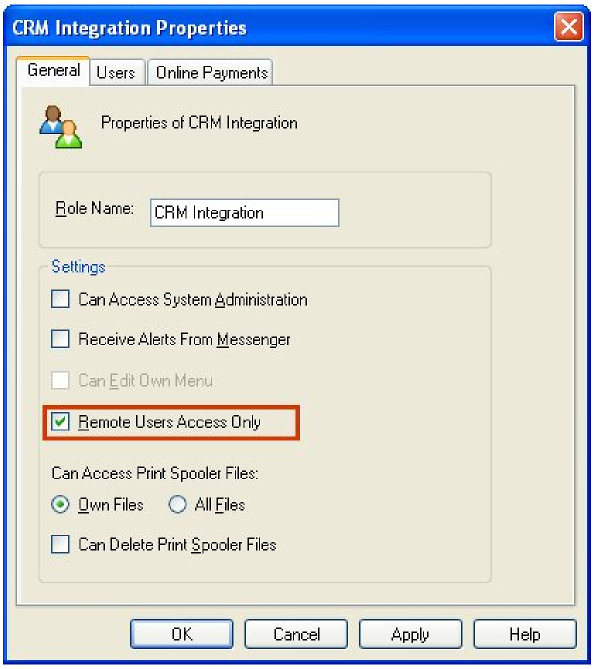
Create a CRM role in Sage 200 System Administration

Next, you must set up a role for the new user. We recommend that you create a role solely for CRM Integration.

You must also authorise the relevant features for the CRM role. Your must authorise the features for the Sage 200 forms you want to launch from Sage 200 CRM.

To create a CRM role

1. From the Navigation bar, choose Roles.
2. Right-click and select Add New Role.
3. Enter the Role Name, for example CRM Integration. Click OK.



4. Select Remote Users Access Only.

   Note: If you do not do this an additional user licence will be used.

   As the user we need to create is for the use of integrating with CRM only, it is not necessary to allow the full functionality of the Sage 200 accounts system.

5. Select the Users tab.
6. Select the new user that you have created for CRM. Use the arrow keys to move the user to the Selected users list.
7. Click OK once you have finished adding users to the role.

To authorise features for the CRM role

1. Select the CRM role. Right-click and select Features.
2. Select the relevant CRM features.
3. Click OK.

Set up Sage 200 CRM in Sage 200

In Sage 200 you must:

- Set up a customer account in Sage 200 for prospect quotations.
- Enter the CRM integration settings.

Set up an account for prospect quotations in Sage 200 Accounts

If you want to use prospect accounts within CRM, you also need to create a customer account in Sage 200 for your prospects. You can create a new customer account, or alternatively you can use an existing customer account.

If you create a new account, you can see the prospect accounts that have been raised on your Sage 200 CRM system and sent to Sage 200.

Once you have created a customer account for your prospects, you must set this as the default account in the Sales Order Processing module in Sage 200.

1. Log on to Sage 200.
2. If required, create a new customer account for your prospects.

   Open Sales Ledger > Customer Accounts > Enter New Account.

   For more information about creating customer accounts in Sage 200, see the Sage 200 help.
3. To set the prospect customer account as the default in the Sales Order Processing module, open Sales Order Processing > SOP Utilities > SOP Settings.
4. Select the Default Accounts tab.
5. Select Allow quotation to be entered for prospects.
6. Select the customer account from the A/C Ref drop-down list.
7. Click OK to save the changes.

Set up the CRM Integration Settings in Sage 200

You must now enter the integration settings if you want make the profitability information available to all users when entering web orders.

1. Log on to Sage 200.
2. Open Accounting System Manager > Settings > CRM Integration Settings.
3. Select Display Profit in CRM Order Entry.
4. Click OK.

Set up the integration in Sage 200 CRM

Important

This section should only be used if you are setting up an integration between Sage 200 Accounts and Sage 200 CRM for the **first** time.

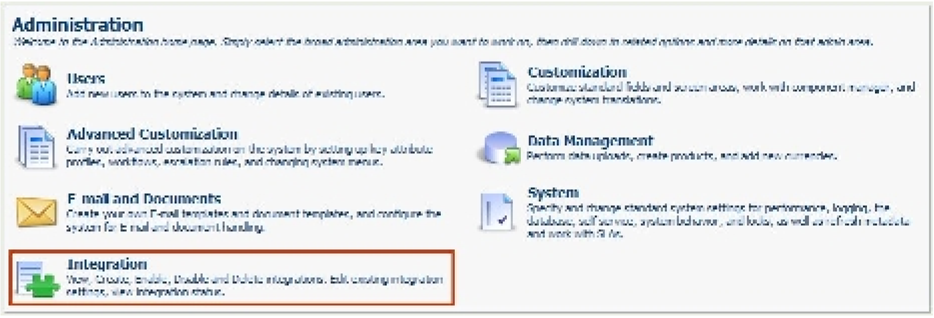
If you are upgrading from a previously integrated system, see Upgrading Sage 200 CRM to v2010 on page 163.

To set up the Sage 200 CRM integration you must:

- Create a new Sage 200 CRM integration.
- Set up and enable the new integration.
- Check the integration is working and synchronise the data

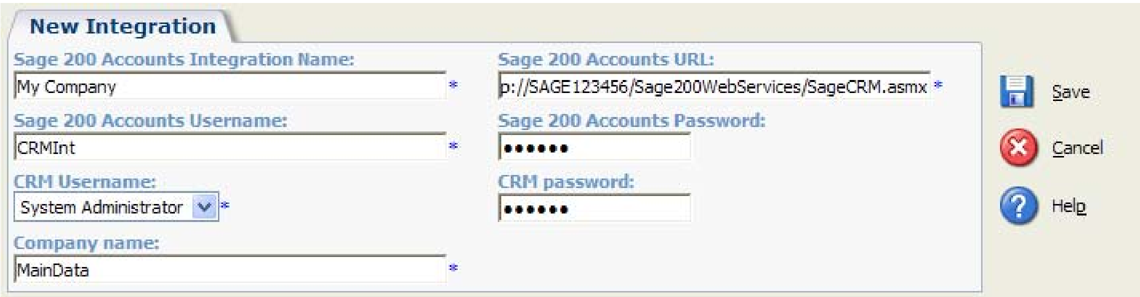
Create a new Sage 200 CRM integration

1. Log on to Sage 200 CRM. The default User Name is Admin. There is no password.
2. From the Administration page, select Integration, and then select Integration List.



3. Click New.

   The New Integration screen appears. This is where you set up the integration details.



4. Enter the following information:
   - Sage 200 Accounts Integration Name.

     Enter a description of the Sage 200 Accounts data that is being integrated.
   - Sage 200 Accounts URL.

     Enter the web address that links to your server's WebServices folder, followed by the web service name itself (SageCRM.asmx).

     The usual format is:

     https://<servername>/Sage200WebServices/SageCRM.asmx

     Note: Once the URL has been saved, you cannot change it in the user interface.
   - Sage 200 Accounts Username.

     Enter the Sage 200 user account user name that you want the integration to use when you connect to Sage 200 Accounts.
   - Sage 200 Accounts Password.

Enter the password for the Sage 200 user account.

- CRM Username.

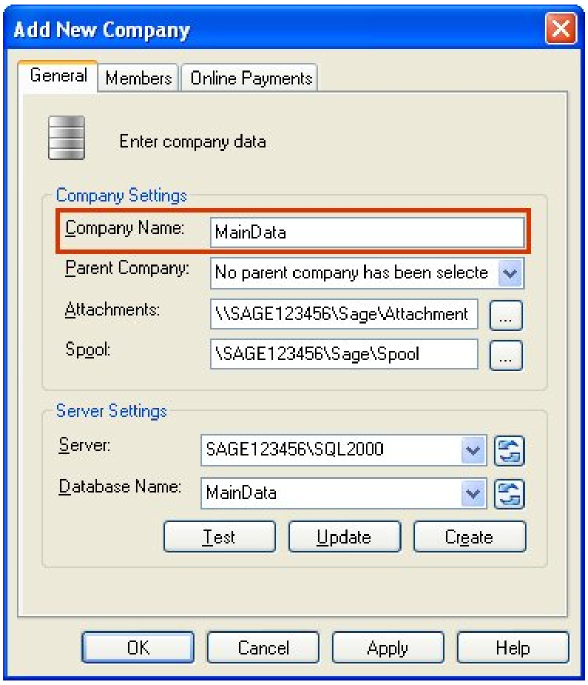
  Enter the CRM username that is being used for the integration. We recommend that you set this to the System Administrator.

- CRM Password.

  This is the password for the CRM Username that you have selected .

- Company Name.

  Enter the name of the company data set up in Sage 200 System Administration. For example:



5. Click Save to accept the details.

   The integration setup will begin. This may take a few minutes to complete.

Note: When setting up the integration on Windows Server 2008, the installation progress is not displayed on screen. The installation is taking place. Do not close the Integration Configuration page. When the integration installation is complete the page will update.

6. When complete, click Continue to save the information.

Enter your integration settings

1. Open Sage 200 CRM and click Administration.
2. Click Integration >Integration List.

3. Select the name of the new integration that you have set up. The Configuration screen appears.
4. Click Change.
5. Enter the following information:
    - Integration Timeout (seconds).

      This is the length of time that CRM will wait for a response from the Sage 200 Web Service method to return a response. The recommended setting is 300 seconds (5 minutes).
    - Sync Interval.

      This is the time taken for each synchronisation to start. If a synchronisation is started manually, then the next synchronisation will take place the number of minutes specified from then. It is worth taking into account two factors: if a setting is chosen where a synchronisation takes place frequently, there will be a greater load on the server. However, if the synchronisation takes place less frequently, the amount of data available within CRM will not be as high.

      Note: If the Sync Interval is set to zero, there is no delay between synchronisations.
    - Max Errors Allowed.

      This is the maximum number of errors that a synchronisation can report before the synchronisation is stopped. The default value is 100.
    - Default Territory.

      This is the territory that will automatically be assigned to every new account created by the synchronisation. The default territory is Worldwide.

      Note: Orders and quotes are created using the same territory as their parent account.
    - Default Account Manager.

      The selected user will automatically be assigned as the account manager for any new accounts that are created via the synchronisation. The primary team of the selected account manager will be used as the default team of the new record. This is not set as default.
    - Allow Deletion of Linked Accounts.

      This allows the System Administrator to override normal user security options in order to delete any accounts in CRM that are linked to Sage 200 Accounts. The default option is set to true (checked).
    - Allow users to create accounts in CRM.

This setting determines how accounts should be created and linked to the Sage 200 Accounts system. This is set to Yes and Manually Link by default and cannot be changed here.

- Price Sage 200 Accounts products in multi-currency.

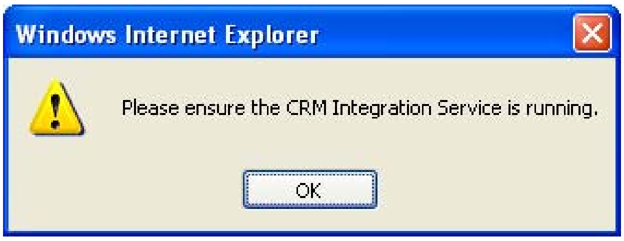
  This is set to Yes by default and cannot be changed here.
- Create New Company With Each Account.

  This is set to Yes by default and cannot be changed here.

6. Decide which details will be used when the same record has changed in Sage 200 and Sage 200 CRM.
   a. Select the Entity Mappings tab.
   b. Select the Account Mapping entity and choose the application in the Who Wins property.

      This governs which details are used and which details are overwritten.
7. Click Save to apply these changes to the integration.
8. Select the Summary tab. Click Enable.

   A warning prompt appears.



9. Click OK to continue.

Next you must make sure that the CRM Integration Service is running.

Check the CRM Integration service

Once you have configured CRM and set up the new integration, you must set up the CRM Integration Service so that it runs automatically.

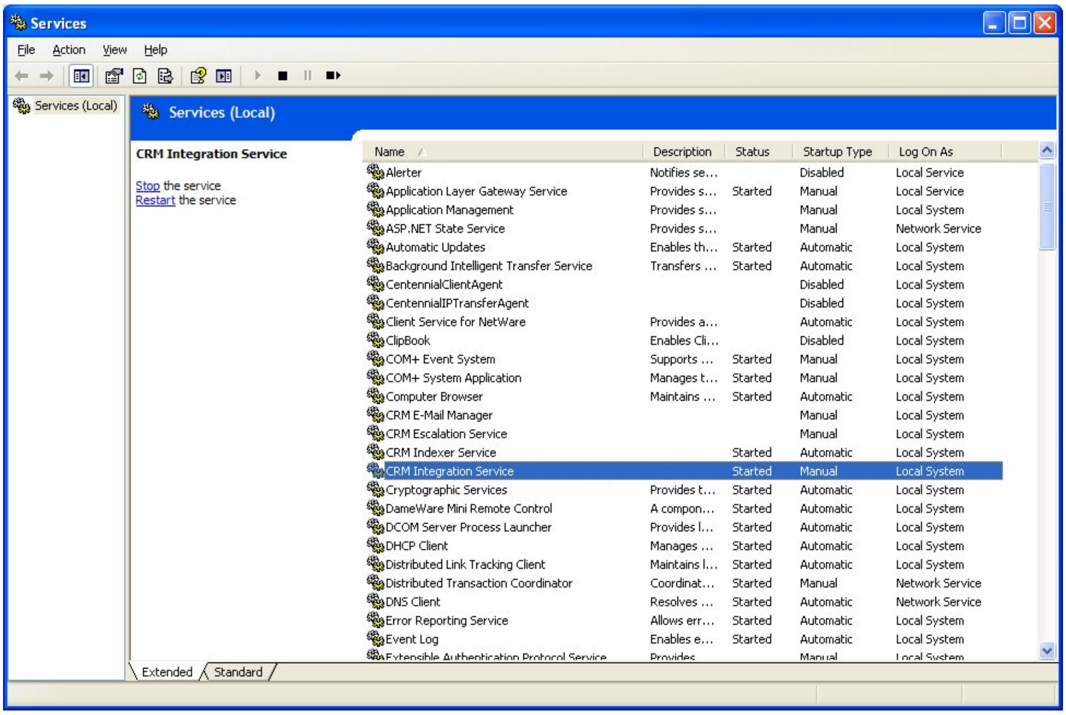
You must also start the synchronisation process. This passes your accounts and CRM information between your Sage CRM and Sage 200 Accounts program.

To check the CRM Integration service

You can do this in the Services section of the Control Panel on your PC or you can use the Run box.

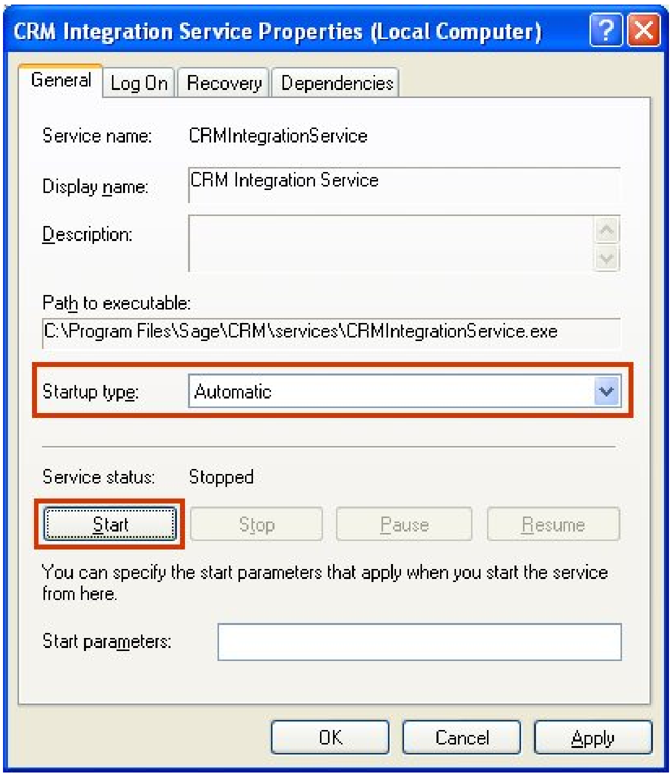
1. Choose Start > Run.
2. Enter services.msc in the box.
3. Click OK.

   The Services window appears:



4. Select CRM Integration Service from the list.

   The Properties window appears.



5. Make sure the Startup type is set to Automatic.
   This ensures that each time the server is restarted, this service is also started.

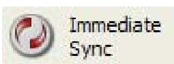
   Note: If the service status is Stopped, click Start to restart the service.

6. Click OK.

The integration setup is complete.

Now that the integration is set up and running you must now set off the synchronisation process.

To run the synchronisation for the first time

1. Log into Sage CRM.
2. Open the Integration Setting that you have created.
3. Click Immediate Sync 

.

The synchronisation begins. The time it takes to complete the synchronisation depends on the size of your Sage CRM and Sage 200 Accounts databases.

The initial synchronisation may take some time as it is synchronising all customers, suppliers, products, orders and quotations from Sage 200 to Sage 200 CRM. Once the initial synchronisation is complete, subsequent synchronisations only process records since the last synchronisation and are therefore much quicker.

Troubleshooting installing Sage 200 CRM

The following section covers some of the issues you may need to be aware of when installing and configuring Sage 200 CRM.

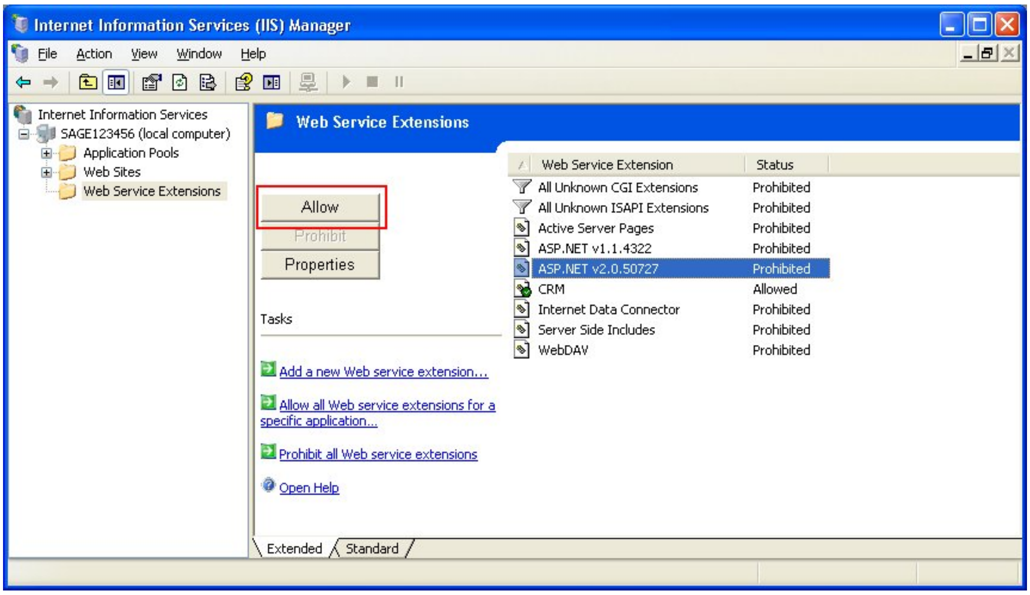
Enable Active Pages in IIS

If you are using Internet Information Services (IIS) 6.0 or 7.0, you must configure it to allow Active Server Pages (ASP). ASP is disabled by default.

To enable Active Server Pages using Windows Server 2003

1. Open the Control Panel.
2. Open Administrative Tools.
3. Open the Internet Information Services Manager.

   The IIS Manager screen appears.



4. Open the local computer node and select the Web Service Extensions folder.
5. Click Active Server Pages to open the pop-up menu.
6. Click Allow.
7. Select ASP.NET v2.0.50727 from the Web Service Extension list.
8. Click Allow.

   If ASP .NET v2.0.50727 is not shown in the list:

   a. Close IIS Manager.
   b. Click Start > Run.
   c. Enter Command in the box. A command prompt appears.
      Enter the following text at the command prompt:
      C:\Windows\Microsoft.NET\Framework\v2.0.50727\ASPNET_REGIIS -I.

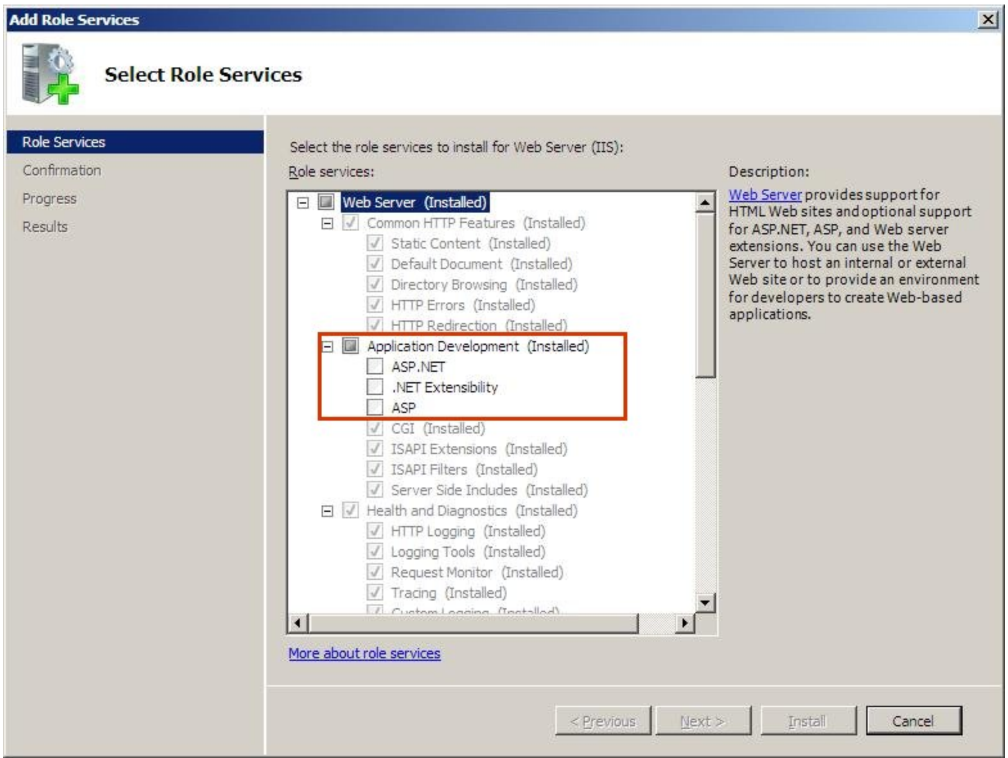
d. Click Enter.

e. Restart the PC, and open IIS Manager. ASP.NET v2.0.50727 will be displayed in the list.

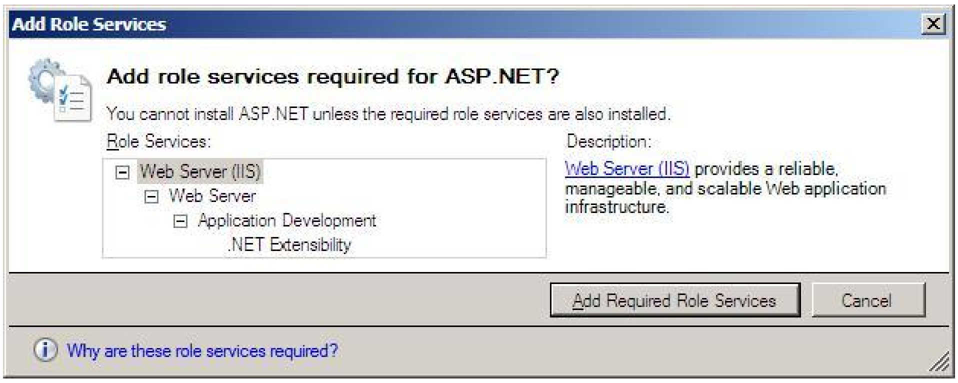
f. Click Allow.

To enable Active Server Pages using Windows Server 2008

1. Open Start > Settings > Control Panel.
2. Click Programs and Features.
3. Click the Turn Windows Features On/Off link. The Server manager Screen appears.
4. Select Roles from the list. The Roles options open in the list.
5. Select Web Server item on the tree. The information in the right-hand panel will update.
6. Click on the Add Role Services link on the right-hand panel. The Add Role Services screen appears:



7. Select ASP.NET. The following message appears:



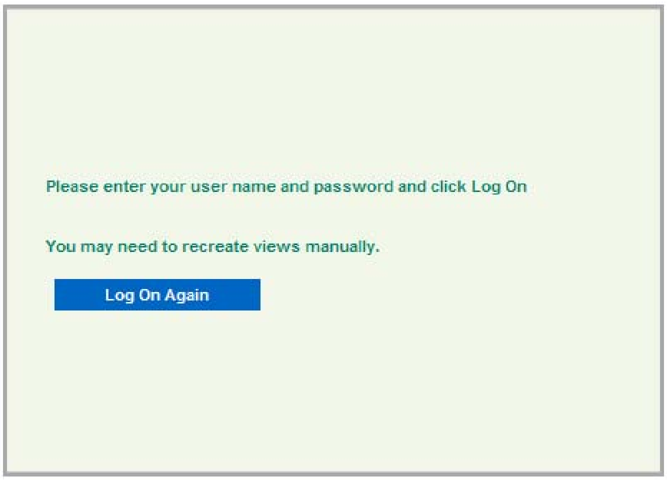
8. Click Add Required Role Services The screen will close and return to the Server Manager screen.
9. Select the ASP checkbox.
10. Scroll down the list and make sure that the IIS 6 Metabase Compatibility checkbox is selected.
11. Click Next. This will then install and activate ASP.NET.

    Once installed, restart your PC if prompted.

IIS Directory Security Configuration

IIS needs to be configured so that Sage 200 CRM has the necessary permissions to access the CRM Server.

After you have logged into CRM for the first time, you may see the following error.



There are two possible reasons why this message appears:

- IIS cannot connect to the server, or
- The password used to connect SQL Server to Sage CRM has changed since Sage 200 CRM was installed.

To connect IIS with the server

By default, the anonymous login details are used for the system account IUSR_ COMPUTERNAME. These details are only used by that PC. Therefore it cannot exist on any other PC or servers. If these details are being used, you should change the security settings.

1. Open the IIS Manager.
2. Find the name of the PC in the list. Click on the list to open the options for the PC.
3. Select the Web Sites option for the PC.
4. Select the Default Web Site folder.
5. Right-click the CRM folder and select Properties from the pop-up menu. The CRM Properties window appears.
6. Select the Directory Security tab.
7. In the Authentication and Access Control section, click Edit. The Authentication Methods window appears.
8. Enter the User name and Password details.
9. Make sure that the Integrated Windows authentication checkbox is not selected.
10. Click OK to save any changes.
11. Close the IIS Manager.
12. Restart IIS:
    a. Choose Start > Run.
    b. Enter IISRESET in the run box.
    c. Click OK.

To change the Sage 200 CRM password

1. Within SQL Server, change your password to the password that was used when Sage 200 CRM was originally set up.
2. Log into Sage 200 CRM.
3. Click Administration > System > Databases.
4. Click Change.
5. Change the Database user ID and/or Database password that will be used as the new user/password combination.
6. Click Save.

You can now change the password in SQL Server.

Enabling the integration with Windows 2003 Server or Windows 2008 Server

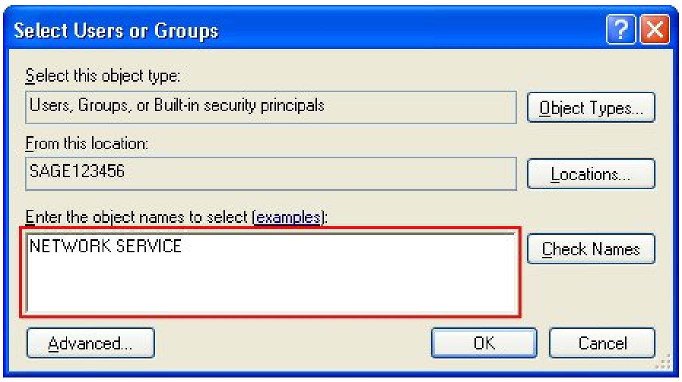
The integration may fail if Sage CRM does not have access to the Sage 200 Accounts server installation folders.

If this happens, the following error is displayed.

To allow access, you must change the access rights to the folder that holds the Sage 200 server information.

To set up access to the Sage 200 server folder

1. To close the message, click Continue. This allows you to retry the integration setup.
2. Locate the Sage 200 server folder.
   By default, the Sage 200 server is installed in a folder and location named C:\Sage.
3. Right-click on the folder and select Sharing and Security from the pop-up menu.
   The Sage Properties screen appears.
4. Select the Sharing tab.
5. Make sure that the Share this folder option is selected.
6. Click Permissions to see the permissions information.
7. Click Add. The Select Users or Groups screen appears:



8. In the Enter the object names to select box, enter NETWORK SERVICE.

9. Click OK. You are returned to the Permissions screen. The NETWORK SERVICE user is highlighted.
10. Select Allow in the Full Control column.
11. Click OK to accept the changes.

    You are returned to the Permissions screen. You have now set up a user account. This account must now have the correct security permissions.
12. Select the Security tab.
13. Click Add.
14. In the Enter the object names to select box, enter NETWORK SERVICE.
15. Click OK.
16. Select Allow in the Full Control column.
17. Click OK.

    The new user account now has full rights to the Sage 200 server folder.
18. Log into Sage 200 CRM again and click Save. The integration setup starts again.

Change the port number for the Sage 200 CRM Form Launcher

By default, the Sage 200 CRM Task Launcher Listener listens on port 8088. If this port is already in use, then you must change the port in the Task Launcher Listener and in Sage 200 CRM.

To change the port in the Sage 200 Task Launcher Listener

To change the port in the Sage 200 Task Launcher, you must edit a value in the registry.

1. To open the Registry Editor, choose Start > Run.
2. Enter regedit in the Open box.
3. Click OK. The Registry Editor window appears.
4. Select HKEY_LOCAL_MACHINE > SOFTWARE > Sage > TaskLauncher.
5. In the right pane, right-click on Port.
6. Select Modify from the pop- up menu. The Edit String window appears.
7. Enter the new port value in the Value Data box.

    Note: This port must not be blocked by a firewall.
8. Stop the Task Launcher Listener. Right-click on the system tray icon and select Stop Listener from the pop-up menu.
9. To apply your changes, select Start Listener from the pop-up menu.

Next you must change the Sage 200 CRM settings to use the same port number.

To change the port in Sage 200 CRM

To change the port number used in the Task Launcher URL generated by Sage 200 CRM:

1. Open Sage 200 CRM.
2. Select Administration > System > ERP Form Launch Settings. The Sage 200 Accounts Form Launch Settings page appears.
3. Enter the new Port Number.

   Note: This port must not be blocked by a firewall.

4. To confirm the new port number, click Save.

Using the Form Launcher with Terminal Services and Citrix

When two users log into a Citrix or Terminal Services machine, the Task Launcher opens twice and an error message is displayed. To resolve this you must:

- Set the Task Launcher service to run automatically.
- Set the Task Launcher to run in Multi-user mode on the client desktop.

For further information on how to configure the Sage 200 Suite with Citrix and Terminal Services, see Installing the Sage 200 Suite using Citrix or Terminal Services on page 34.

To set the Task Launcher Service to run automatically

1. From the Start menu, select Control Panel > Administrative Tools > Services.
2. Right-click the Sage Task Launcher Service.
3. Select Properties from the pop-up menu.
4. Select Automatic from the Startup type drop-down list.
5. Click Start, to start the service.
6. To confirm the changes, click OK.

To set the Task Launcher mode on client desktop

You must set the Sage Task Launcher to run in multi user mode on your client desktop. To do this, you must add a startup parameter to the Sage Task Launcher shortcut.

You can set up the Sage Task Launcher for individuals users or for all users.

To set the Sage Task Launcher for individual users

1. On the client machine, open the Sage Task Launcher Listener from the Startup folder. Choose C:\Documents and Settings*username*\Start Menu\Programs\Startup.

2. Right-click the Sage Task Launcher Listener shortcut.
3. Select Properties from the pop-up menu.
4. Add /mode:M to the end of the Target string.
5. To confirm the changes, click OK.

To set the Sage Task Launcher startup mode for all users:

Follow the instructions above using the Startup folder in the All Users group. ChooseC:\Documents and Settings\All Users\Start Menu\Programs\Startup.

This makes sure that each user has the Task Launcher running within their session.

Note: This application typically uses about 20MB of memory.

Sage 200 CRM takes a long time to synchronise accounts or the synchronisation fails with a timeout error

If you are running the Sage 200 CRM synchronisation on a machine that does not have Internet access, it can take a long time to synchronise accounts or the synchronisation may fail with a timeout error.

This can occur because the web service used to synchronise accounts tries to check for revoked certificates online. To speed up the synchronisation, it is possible to turn off this check.

> **Important**
>
> This setting should only be changed on a PC that does not connect to the Internet. If the PC is later connected to the Internet, the original setting must be restored.

1. Open Internet Explorer.
2. Select Tools > Internet Options > Advanced.
3. Scroll down the Settings list to the Security section.
4. Clear the checkbox for Check for publisher's certificate revocation.
5. Click OK to close Internet Explorer.
6. Reboot your PC and restart the Sage 200 CRM synchronisation.

Form Launching using Internet Explorer in Protected Mode

If user access control (UAC) is turned on, and the logged on user is not an administrator, Sage 200 forms do not launch remotely from Sage 200 CRM. This is most common when using a server as a terminal server machine.

This issue is caused by the Protected mode setting within Internet Explorer > Internet Options > Security. This prevents malicious code being run by websites on your machine. By default, this is switched on for all zones, other than trusted sites. Within Internet Explorer, you can see if protected mode is on by looking at the status bar on the bottom right side of the Internet Explorer window. The status will be Local Intranet: Protected Mode On.

The CRM website is in the Local Intranet zone. This has protected mode enabled when UAC is turned on. When you attempt to launch forms, the CRM website posts a request to the local machine. This is blocked by Internet Explorer. Adding the CRM web server to the list of trusted sites will allow CRM to launch forms on the users session, as trusted sites do not have protected mode enabled by default.

Adding the CRM website to the list of trusted sites should be done on a per user basis:

1. Open Internet Explorer and select Tools > Internet Options.
2. Select the Security tab.

3. Select Trusted Sites.
4. Click Sites.
5. Enter the URL for CRM in to the box.

   For example,if your CRM URL is https://myserver/CRM/eware.dll, enter the URL as https://myserver.
6. Click Add and the URL will now appear in the trusted websites list.

   Note: You may be prompted to have a secure URL; clear the Require server verification (https:) for all sites in this zone check box, if you are not using https for your CRM site.
7. Click Close on the Trusted Sites window.
8. Click OK to apply these changes.

   If you opened the Internet options from within Internet Explorer then you should restart Internet Explorer to ensure the changes are applied.

If you run Internet Explorer again and navigate to the CRM website, the status at the bottom right of Internet Explorer is Trusted Sites: Protected Mode Off. You can now launch Sage 200 forms from CRM.

Form Launching does not launch any form

Make sure you do have have pop-up blocker enabled in your web browser application.

10

Upgrading the Sage 200 Suite

Use this section, if you have an existing installation of any products in the Sage 200 Suite and you are upgrading to Sage 200 v2010.

You may have to use the Sage 200 Data Migration tool if you are upgrading from earlier versions of Sage 200 or from other Sage products. You can install the Sage 200 Data Migration Tool using the installation file in the Sage 200 Migration Tool folder on your Sage 200 DVD. Please see the Sage 200 Data Migration Guide for more information about using the Data Migration Tool.

The following table shows the upgrade process for each product.

Current product	Upgrading to Sage 200 v2010
Sage 200 v3.0 - v2009	Follow the instructions for Upgrading to Sage 200 v2010 on page 151
Sage 200 Manufacturing v5.0 - v2009	Follow the instructions for Upgrading to Sage 200 Manufacturing v2010 on page 155
Sage 200 Wholesale and Retail	Follow the instructions for Upgrading to Sage 200 v2010 on page 151
Sage 200 Business Intelligence v5.1 - v2009	Follow the instructions for Upgrading to Sage 200 Business Intelligence v2010 on page 158
Sage 200 CRM v5.8 - 6.2	Follow the instructions for Upgrading Sage 200 CRM to v2010 on page 163
Sage 200 Bill of Materials up to v2009.	Use the Sage 200 Data Migration Tool.

Current product	Upgrading to Sage 200 v2010
Sage MMS v1 - v2.3.	Use the Sage 200 Data Migration Tool.
Sage MMS v1 - v2.3 Bill of Materials.	Use the Sage 200 Data Migration Tool.
Sage MMS Bill of Materials v3.0 or later.	Use the Sage 200 Data Migration Tool.
Sage Line 100 v7.2 or later.	Use the Sage 200 Data Migration Tool.
Sage Line 100 Bill of Materials v7.2 or later.	Use the Sage 200 Data Migration Tool.
Sage 50 Accounts v2008 - v2010.	Use the Sage 200 Data Migration Tool.
Sage 50 Accounts Bill of Materials v2008 - v2010.	Use the Sage 200 Data Migration Tool.

Upgrading to Sage 200 v2010

Follow the instructions in this section to upgrade Sage 200 v3.0 - v2009 (without Bill of Materials).

If you are upgrading Sage 200 Manufacturing, see Upgrading to Sage 200 Manufacturing v2010 on page 155.

If you are upgrading Sage 200 Business Intelligence, see Upgrading to Sage 200 Business Intelligence v2010 on page 158.

If you are upgrading Sage 200 CRM, see Upgrading Sage 200 CRM to v2010 on page 163

If you upgrading Sage 200 Wholesale and Retail, you must uninstall your existing installation of Wholesale and Retail before upgrading to Sage 200 v2010.

If you are upgrading Sage 200 Bill of Materials, you must use the Sage 200 Data Migration tool to upgrade to Sage 200 v2010.

Note: Before you begin we recommend that you uninstall your current installation of Sage 200.

To upgrade to Sage 200 v2010 you must:

- Install Sage 200 v2010.
- If you are upgrading from Sage 200 v3.0 - 5.1:
  - You must create a configuration database in the Sage 200 System Administration tool.
  - You can choose to migrate your existing system administration data to the new Sage 200 System Administration tool (this was introduced in Sage 200 v2009).
- If you are upgrading from Sage 200 v2009, update your Configuration database using the Sage 200 System Administration tool.
- Update your company databases using the Sage 200 System Administration tool.

Note:
The creation and use of analysis codes has been improved across the Sage 200 Suite for v2010. However, the way that you set up analysis codes has changed from previous versions of Sage 200.

When you upgrade from a previous version of Sage 200, the analysis codes will be created in Accounting System Manager. If you had used the same analysis code in two places in a previous version of Sage 200, two analysis codes will be created in v2010; one of the code names will contain a (1).

For an full description of how analysis codes work in v2010 and upgrading analysis codes, see the New Features Guide in the Sage 200 User Guides folder on your Sage 200 DVD.

Install Sage 200 v2010

1. Install Sage 200 using the Sage 200 suite installer on your Sage 200 v2010 DVD.
2. Choose the Sage 200 components you want to install from the installation wizard.

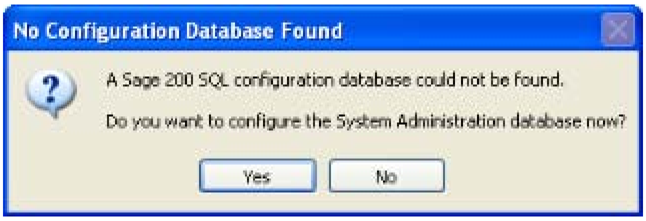
   For further information about installing the Sage 200 Suite see:

   - How to deploy Sage 200 across a network on page 13
   - Installing the Sage 200 Suite for the first time on page 39.

Upgrade or create your configuration database

1. Open Start > Programs >Sage Tools > Sage 200 > System Administration.

   The following message appears:



2. Click Yes. The Server properties window appears.
3. Enter or browse for the correct SQL server settings.
4. Click:
   a. Create to create new configuration database (Sage 200 v3.30 - v5.1).
   b. Upgrade to upgrade an existing configuration database (Sage 200 v2009).
5. If required, enter the Logon Name and Password for a SQL user that has access rights to create a database.
6. Click OK.

Migrate existing administration data (Sage 200 v3.0 - 5.1)

A new administration tool was introduced in Sage 200 v2009. You can choose to migrate some or all of your existing administration data from the old System Administrator program to the new Sage 200 System Administration tool.

You can migrate the following:

- Company set up information

  This migrates your company name, parent company, attachments directory, spool directory server and database name for each Sage 200 company.
- Groups

  This migrates your groups. These become Roles in the new System Administration tool.
- Users

  This migrates the names, passwords and details of the users you choose to migrate. If you choose to migrate user group membership, these users are assigned to Roles in the new System Administration tool.
- Customisations

  You can migrate customisations for individual groups or all groups.
- Menus

  You can choose which menus to migrate. These menus are assigned Features in the new System Administration tool. You decide which Roles can use these menus. You use the Menu Design Mode in Sage 200 to change the menus and create new ones.

To migrate administration data

1. Once you have created your configuration database, the following message appears:

2. To migrate your existing System Administrator data, click Yes. The System Administration Migration Utility wizard appears.
3. Follow the steps in the System Administration Migration Utility wizard.

   Note:
   On the Site Configuration screen, enter the SAA Web Service Address in the following format:

   http://<*Name of Sage 200 Application Server machine*>/Sage200Administration/Sage200AdminService.asmx

To upgrade your company databases

If you have an existing Sage 200 company database, you must add the company in the System Administration tool. The database must be attached to your SQL server.

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.
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
Attachments	Enter the path to the Attachments folder for this company. This must be a UNC path. This is the directory used to store company specific files, such as documents and layouts. You must use separate attachments directories for different companies
Spool	Enter the path to the Spool folder for this company. This must be a UNC path. This is the directory used to store report spool files. We recommend that you separate spool directories for different companies.

4. Enter your Server Settings:

Server.	Enter the name of your SQL server. You must have the appropriate permissions to access the server.
Database Name	Enter the name of the database on the server. If this is an existing Sage 200 database that is attached to the SQL server, select the database from the drop-down list.

5. Choose from one of the following:
   - Test.

     Click this to test the connection to the database.
   - Update.

     Click this to update an existing Sage 200 database.
   - Create.

     Click this to create a new Sage 200 database on your SQL server.

Upgrading to Sage 200 Manufacturing v2010

Follow the instructions in this section to upgrade an existing installation of Sage 200 Manufacturing v5.0 - v2009.

If you are using Sage 200 Bill of Materials, you must use the Sage 200 Data Migration tool to upgrade to Sage 200 v2010.

Important: If you are using Bill of Materials with Manufacturing

Manufacturing is being extensively redeveloped and this process is not yet complete.

Consequently, some of the information that you can enter and use in the Bill of Materials module now, cannot be used yet in the Estimating, Planning and Works Orders modules.

If you are using, or plan to use all Manufacturing modules, you must follow these guidelines for operations that you add to the BOM record.

Note: If the BOM record has been created by converting a one-off works order into a BOM, an operation resource is added to the BOM record automatically. Do not rename this operation. If you do, you will not be able to update information between the BOM and the Works Order.

- On the operation record Details tab, do not use the Overlap Quantity or enter seconds values for the resource.
- On the operation record Resources tab, do not enter seconds values for the resource. Ensure that you add only the following resources with the following settings:

Phase	How many Resource Types?	Resource Type	Primary/Secondary	Fixed Length
Setup	One	Select either a *Machine Resource* or a *Machine Resource Group*.	Select either *Primary* or *Secondary*.	You must select Fixed Length for the resource.

Phase	How many Resource Types?	Resource Type	Primary/Secondary	Fixed Length
Runtime	Three	Select one *Labour Resource* or *Labour Resource Group*. Select one *Machine Resource* or *Machine Resource Group*. Select one *Tool Resource* or *Tool Resource Group*. **Note:** Only select a tool resource or resource group if you have also selected a labour and a machine resource or resource group.	Select Primary for your labour Resource Type and Secondary for your machine Resource Type or vice versa. **Note:** Do **not** select either Primary or Secondary for your tool Resource Type selection.	Do not select Fixed Length for the resource or resource group.
Teardown	None			

- On the operation record Subcontract tab, add only one supplier and no more than five quantity breaks. The supplier must use base currency.

Note:
The following characters are supported in the Bill of Materials module, but not in other Manufacturing modules:

Apostophe (')

Quotation (")

To upgrade to Sage 200 Manufacturing v2010

In your current installation of Sage 200 Manufacturing you must:

- Make sure that you have no BOM's checked out.
- Make sure that a Group is assigned to your Labour and Machine resources. This will ensure that you can move your resources within the correct group when using Graphical Planner to manage your production plan. If you upgrade without assigning resources to a Group in versions prior to v2009, the resources will be

assigned to a group called Missing. Graphical Planner will allow you to move operations that use any resource in group Missing to any other resource in the same group.

Before you begin we recommend that you uninstall your current installation of Sage 200.

To upgrade Manufacturing:

1. Install Sage 200 using the Sage 200 suite installer on your Sage 200 v2010 DVD.
2. Choose to install the Sage 200 and Sage 200 Manufacturing components from the installation wizard.

   For further information about installing the Sage 200 Suite see:

   - How to deploy Sage 200 across a network on page 13
   - Installing the Sage 200 Suite for the first time on page 39.
3. If you are upgrading from Sage 200 Manufacturing v5.0 - 5.1:
   - You must create a new configuration database in the Sage 200 System Administration tool. See Upgrading to Sage 200 v2010 on page 151
   - You can choose to migrate your existing system administration data to the new Sage 200 System Administration tool (this was introduced in Sage 200 v2009). See Upgrading to Sage 200 v2010 on page 151.
4. If you are upgrading from Sage 200 Manufacturing v2009 you must update your Configuration database using Sage 200 System Administration tool. See Upgrading to Sage 200 v2010 on page 151.
5. Update your company databases using the Sage 200 System Administration tool. See Upgrading to Sage 200 v2010 on page 151.

Upgrading to Sage 200 Business Intelligence v2010

Follow the instructions in this section to upgrade an existing installation of Sage 200 Business Intelligence.

Note: If you have not had Sage 200 Business Intelligence installed previously, you will need to obtain a licence key.

Sage 200 BI v2010 has both file server and application server components. If required you can install these components on separate file server and application server machines.

For information about how to install Sage 200 v2010 across a network, see How to deploy Sage 200 across a network on page 13

Important

If your Sage 200 Application Server machine (formerly known as the Web Server), is not the same as your SQL server machine, you must manually create a new scheduled task for each Sage 200 company that uses BI on the Sage 200 Application server and delete the existing scheduled task from the SQL server machine.

In earlier versions of Sage 200 BI, the scheduled task was installed on the SQL server machine.

See Manually creating a scheduled task to update the cubes on page 94.

Upgrading from BI v5.1

1. Backup all Sage 200 databases (including data warehouses and analysis services databases).
2. Make a copy of the settings.xml file found in the following folder:

   \\[Sage200ServerMachine]\Sage\Databases.
3. Uninstall the following BI components
   - Sage 200 BI Server v5.1 from the Sage 200 Server.
   - Sage 200 BI Excel Client v5.1 from all PCs where it is installed.
   - Sage 200 BI Client v5.1 from all PCs where it is installed.
4. Install Sage 200 BI v2010. Use the Sage 200 Suite v2010 installer to install the Sage 200 BI components on the following:
   - Sage 200 File Server
   - Sage 200 BI Application Server (if different from the File Server).
   - Sage 200 Client (where required).

For information about installing the Sage 200 Suite, see Installing Sage 200 on page 42 .

5. Put the settings.xml file, copied earlier, back into the following folder:

   \\[Sage200ServerMachine]\Sage\Databases.

6. If you have created custom reports or connections, you must make sure that they are copied to their correct location in Sage 200 v2010.

   For windows XP:

Copy from	Copy to
C:\Program Files\Sage\Sage 200 IALibrary\Connections	C:\Documents and Settings\[User Name]\Local Settings\Application Data\Sage\Sage 200 BI\Connections
C:\Program Files\Sage\Sage 200\IALibrary\Reports.	C:\Documents and Settings\[User Name]\Local Settings\Application Data\Sage\Sage 200 BI\Reports

   For Vista and Windows 7:

Copy from	Copy to
C:\Program Files\Sage\Sage 200 IALibrary\Connections	C:\Program Data\Sage\Sage 200 BI\Connections
C:\Program Files\Sage\Sage 200\IALibrary\Reports.	C:\Program Data\Sage\Sage 200 BI\Reports

7. If required, create new scheduled tasks on your Sage 200 Application Server. You must create a scheduled task for each Sage 200 company that uses BI. Delete the existing scheduled task.

8. Upgrade the data warehouse:

   a. Open Sage 200 Business Intelligence Administration Tool .

   b. Select Upgrade warehouse for each Sage 200 company that uses BI.

Upgrading from BI v2009

1. Backup all Sage 200 databases (including data warehouses and analysis services databases).

2. Uninstall the following BI components

   - BI Server v2009 from the Sage 200 Server.
   - BI Web Server v2009 from the application server (if different from the BI file server).

- Sage 200 BI Excel Client v2009 from all PCs where it is installed.
- Sage 200 BI Client v2009 from all PCs where it is installed.

3. Install Sage 200 BI v2010. Use the Sage 200 Suite v2010 installer to install the Sage 200 BI components on the following:
   - Sage 200 File Server.
   - Sage 200 Application Server (if different from the file server).
   - Sage 200 Client

   For information about installing the Sage 200 Suite, see Installing Sage 200 on page 42 .
4. If required, create new scheduled tasks on your Sage 200 Application Server. You must create a scheduled task for each Sage 200 company that uses BI.

   Delete the existing scheduled task from your SQL server machine.
5. Upgrade the data warehouse:
   a. Open Sage 200 Business Intelligence Administration Tool .
   b. Select Upgrade warehouse for each Sage 200 company that uses BI.

Upgrading Sage 200 Report Designer

There is a new re-designed Report Designer module for Sage 200 v2010.

All standard reports, layouts,letters and labels in Sage 200 v2010 now have a .report, .layout, .letter or .label file extension.

If you have created your own reports, layouts, letters or labels in Report Designer prior to Sage 200 v2010, these will have a .srt, .sly, .slt or .slb file extension. You can still use these in Sage 200 v2010.

If you want to edit any of your customised .srt, .sly, .slt or .slb files, you have two options:

- You keep the reports as .srt, .sly, .slt or .slb files and edit them using the previous Report Designer module. This is installed alongside the new Report Designer module in Sage 200 v2010. When you open an previous file version from the Report Designer module in Sage 200, it automatically uses the previous version of Report Designer.

  You cannot open .srt, .sly, .slt or .slb files using the new Report Designer module.
- You convert the reports to the new file extensions and edit them using the new Report Designer module. To convert your reports you must:
  - Configure the SQL data source.
  - Import the report into the new Report Designer module.

Please refer to the Report Designer help for more information about the new Report Designer.

To configure the SQL data source

1. Open Control Panel > Administrative Tools > Data Sources (ODBC).
2. Select MMS and click Configure.
3. Select the Server from the drop-down list.
4. Click Finish.

To import reports into Report Designer

1. Copy the relevant files to your current Reports, Layouts, Letters or Labels folder.
2. Open Report Designer.
3. From the File menu, select Import.
4. Locate the file you want to convert and click Open.

   The file is converted to a .report, .layout ,.letteror .label file.
5. Delete the old .srt, .sly, .slt or .sbl file.

Upgrading Sage 200 CRM to v2010

Use this chapter if you are upgrading an existing installation of Sage 200 CRM to Sage 200 CRM v7.0 SP1 (Sage 200 v2010).

Before you can upgrade to Sage 200 CRM v7.0 SP1 your existing Sage 200 CRM installation must be Sage 200 CRM v6.2 (Sage 200 v2009).

To upgrade your Sage 200 CRM v2010:

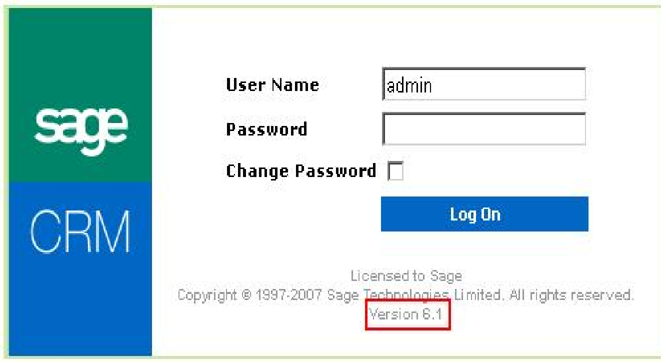
- If you are running a version of Sage 200 CRM that is earlier than v6.2 you must upgrade your existing Sage 200 CRM installation to v6.2.
- Upgrade the account entity and existing screen customisations.

  In Sage 200 CRM v7.0 SP1, the account entity has been hidden. You must use the provided SQL scripts to transfer your data into a format that can be used by Sage CRM v7.0 SP1.
- Install Sage 200 CRM v7.0 SP1.

Before you begin:

- Sage 200 CRM 7.0 requires a new license key. Please make sure you have the new Sage 200 7.0 license key before proceeding.
- Make sure that all of the updates and patches have been installed for your version of Sage 200 CRM.

  You can check the version of Sage 200 CRM that you are using from the log on window.



Upgrading from earlier versions of Sage 200 CRM

Before installing Sage 200 CRM v7.0, you must upgrade all previous versions of Sage 200 CRM to v6.2.

It is not possible to upgrade directly to Sage 200 CRM version 7.0 from all previous CRM versions. This section explains which versions you will be required to upgrade to, from any given starting version of CRM 5.8 or higher.

The route for upgrading is:

v5.8 > v6.0 > v6.0 SP1 > v 6.1 > v6.2 > v7.0 SP1.

In order to upgrade you will require the Sage 200 CRM installation CDs. The following table shows which Sage 200 CRM CDs you will require.

Current version of Sage 200 CRM	Upgrade process and the installation files required.
Sage 200 CRM 5.8	Sage 200 CRM 6.0 SP1 CD Sage 200 CRM 6.1 CD Sage 200 CRM 6.2 CD (Sage 200 Suite v2009 DVD) Sage 200 CRM v7.0 CD (Sage 200 Suite v2010 DVD)
Sage 200 CRM 6.0 without SP1	Sage CRM 6.0 SP1 Patch Sage 200 CRM 6.1 CD Sage 200 CRM 6.2 CD (Sage 200 Suite v2009 DVD) Sage 200 CRM v7.0 CD (Sage 200 Suite v2010 DVD)
Sage 200 CRM 6.0 with SP1 installed	Sage 200 CRM 6.1 CD Sage 200 CRM 6.2 CD (Sage 200 Suite v2009 DVD) Sage 200 CRM v7.0 CD (Sage 200 Suite v2010 DVD)
Sage 200 CRM 6.1	Sage 200 CRM 6.2 CD (Sage 200 Suite v2009 DVD) Sage 200 CRM v7.0 CD (Sage 200 Suite v2010 DVD)
Sage 200 CRM v6.2	Sage 200 CRM v7.0 CD (Sage 200 Suite v2010 DVD)

Follow the instructions for upgrading each version of Sage 200 CRM, starting with the version you are currently running.

Before you upgrade you must

- Make sure that you have a backup of both your Sage 200 Accounts and Sage 200 CRM databases.
- If you are using AIS (CRM 5.8, CRM 6.0, CRM 6.1, WTE) make sure that you have stopped AIS before upgrading. If you have to restart your server during the upgrade process, AIS will also restart. If this happens you must stop AIS before continuing with the CRM upgrade.

Upgrade the existing integration data from versions earlier than Sage 200 CRM v6.2 (Sage 200 v2009)

This section explains how to upgrade existing Sage 200 v4.1, Sage 200 v5.0 and Sage 200 v5.1 integrated data to Sage 200 v2009.

Before you begin you must have:

- Upgraded the Sage 200 installation to Sage 200 2009.
- Upgraded the Sage 200 CRM installation to v6.2.
- Run the initial synchronisation to create an account for each customer and supplier.

Run the Sage 200 CRM Integration Upgrade utility

The integration migration utility links newly created CRM accounts to existing CRM companies. This is based on the existing links set up in the AIS based integration.

You must only use this utility if you are upgrading from a previously integrated version of Sage 200 CRM.

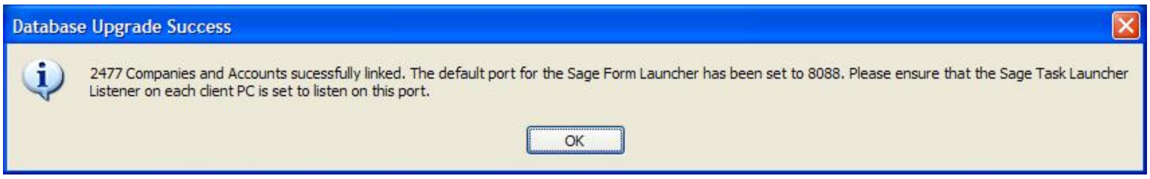
The utility can be found on your Sage 200 DVD in the Sage 200 CRM folder.

1. Open the Sage 200 CRM Integration Upgrade utility. This is the AIStoCRMContractMigration.exe file. Click Next to continue.
2. Read the statement and select the I have read and understood the statement above tick box. Click Next to continue.The CRM Upgrade window appears.
3. Enter the following information:
    a. The name of your SQL Server. Click the browse button to see a list all servers that can be found on the network.
    b. Enter a SQL User Name that has full access to the CRM database on the selected SQL server.
    c. Enter the password for the user name you have entered.
    d. Enter the name of the CRM database that you want to upgrade the integration for. Click the browse button to search for the database.
4. Click Test Connection to test the connection to the database specified and check you can upgrade the database selected.

   Note: For an explanation of any errors that may occur when you test the connection to the database, see Troubleshooting upgrading an existing integration on page 178.

   Click Next to continue. The Ready to upgrade window appears.

5. Click Next to begin upgrading your Sage 200 CRM Integration.
6. When the Integration upgrade is finished, the following message is displayed.



7. Click OK to continue.
8. The Sage 200 CRM Integration upgrade is now complete. Click Finish to close the window.

You can now upgrade Sage 200 CRM to v7.0 SP1.

Upgrading the account entity and screen customisations

Sage 200 CRM v7.0 SP1 (Sage 200 v2010) only supports a one to one mapping between Company and Account. As a result of this change, the Account Entity details have been moved to the appropriate Company screens and all account entity screens have been removed.

Note: These changes only affect the user interface, the underlying database structure between account and company remains the same.

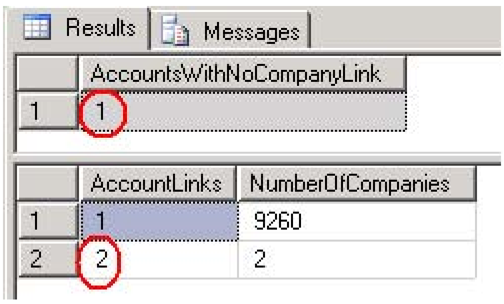
As a result of these changes:

- Customers with many Companies linked to a single Account will need to convert these relationships to one to one.
- Any amendments to the account entity screens in earlier versions of Sage 200 CRM will need to be re-applied to the associated Customer screen.

Converting many companies to one to one relationships

To convert many companies to one to one relationships, you must run two SQL scripts to transfer you data into a format that can be used with Sage 200 CRM v7.0 SP1. These scripts can be found in the Upgrade folder within the CRM folder on the Sage 200 v2010 DVD.

The first script (CheckAccountLinks.SQL), will check your Sage 200 CRM data to check if any one-to-many relationships exist. If they do, a report is generated.



If you see a value in either the AccountsWithNoCompanyLink or AccountLinks table, a many to one relationship has been found.

If this occurs you must run the second script. If there is no value in either table you can continue to install Sage 200 CRM v7.0 SP1.

The second script (2009-2010_Upgrade.SQL), creates individual accounts for each company, where there is more than one company linked to an account.

Sage 200 CRM Integration screen customisations

When you upgrade to Sage 200 V7.0 SP1, any existing customisations applied to Sage 200 CRM, will be overwritten. Therfore you must reapply your existing customisations after you upgrade to Sage 200 v7.0 SP1.

Customisations applied to the following screens will be overwritten:

- CompanyGrid
- CompanyTabs
- AddressBoxLongBlock
- AddressBoxShortBlock
- AddressList
- PersonBoxLong
- PersonGrid
- PersonList
- OpportunityTabs
- OpportunityGrid
- OpportunityList
- OrderSummaryBlock
- OrderFreeTextItemSummaryBlock
- OrderItemsSummaryBlock
- OrdersSearchBox
- OrderListBox
- OrdersList
- OrdersGrid
- OrderFilterBox
- QuoteSummaryBlock
- QuoteFreeTextItemSummaryBlock
- QuoteItemsSummaryBlock
- QuotesSearchBox
- QuoteListBox
- QuotesList
- QuoteFilterBox
- QuotesGrid
- CTICallScreen

Note: If your customisations have been recorded using the CRM Component manager your existing screen may be replaced with a new version of the screen. In this situation, you must manually reapply any changes to the screen. You should not run the customisation script. Running the customisation script will delete the Sage upgrade script changes.

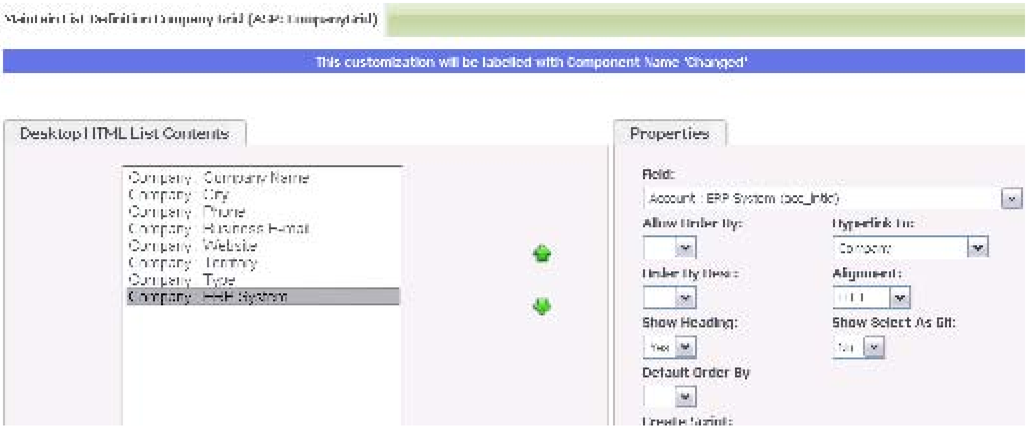
Existing account entity customisations

Due to the removal of account entity screens, any customisation to forms or lists on the account entity will also be removed. If customisation is still necessary, they will have to be re-applied to related screens on the company entity.

Note: If you have added a new table to Sage CRM, related to the account entity, you can still use the relationship. Each company still has an account, it is just hidden from view as they now have a one to one relationship.

You can see how to link account fields to company screens and lists by looking at the customisations made as part of the Sage 200 integration.

For example, the CompanyGrid (populated when you use the Company find), displays a field from the account (acc_intid):



If you have added additional fields to the CRM company entity, these fields will still be available on the entity. However, you must re-apply them to any screens they were on.

If you have added additional fields to the CRM account entity and exposed them on the account entry screen, but not on the company screen, then you must add these fields to the customer entity and add them to the customer screen.

CRM Table Level scripts

The replication of Sage CRM data within the account and customer entities are controlled by table-level scripts. These table-level scripts apply to both entities that are visible through the CRM user interface (Company, Person, Phone), as well as underlying entities (Account, Address Link and Person Link)

You must not amend the functionality of these existing table level scripts. If you amend these scripts, the integration will not function correctly.

Account entity synchronisation changes

If you have extended the synchronisation on the account entity, your additional fields will continue to be synchronised. Please ensure that your extensions XML files or DLLs are re-applied to the new installation.

If any of these additional fields that are being synchronised have been added to the Sage 200 CRM Account screens or lists, you must re-add the fields to the related Sage 200 CRM Company screen or list. Any screen or list that is using Company as the datasource will be able to view the related account fields.

Upgrading from Sage 200 CRM v6.2 to Sage 200 CRM v7.0 SP1

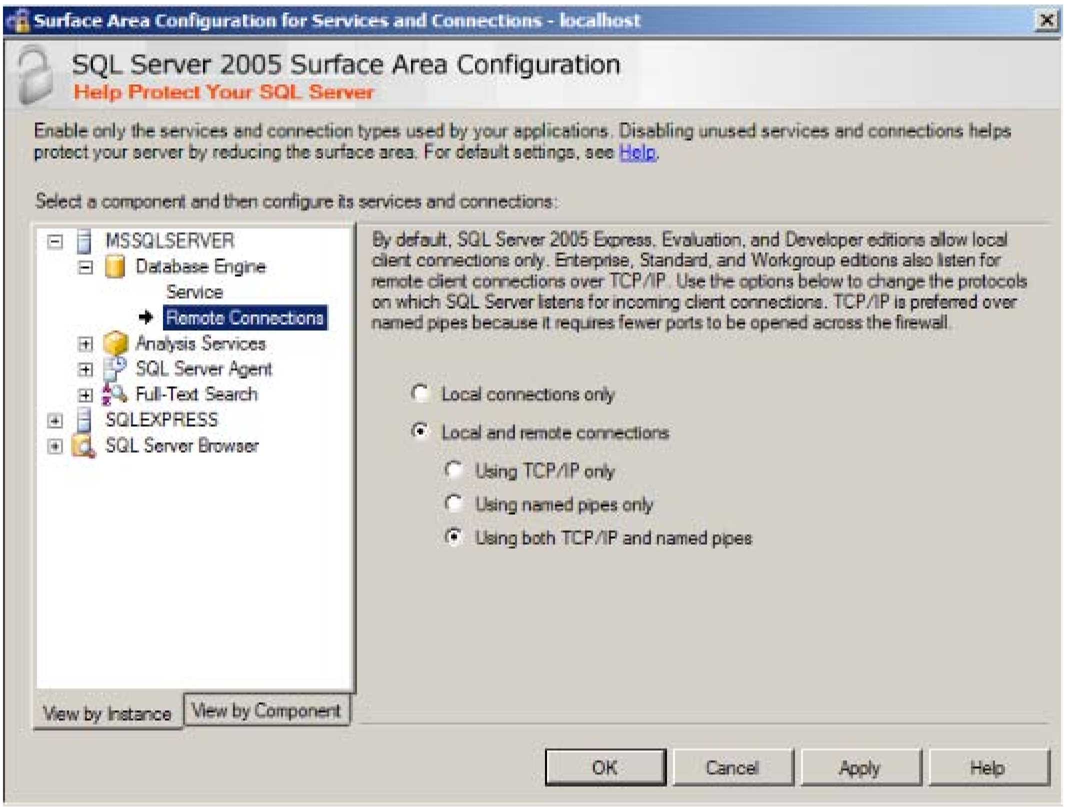
To upgrade your Sage 200 CRM to v7.0 SP1 you must:

- Change the settings for remote connections on your SQL Server.
- Install Sage 200 CRM v7.0 SP1.
- Upgrade your Sage 200 CRM data.
- Run a synchronisation for the first time.

Change your SQL server settings

To change SQL server v2005 settings

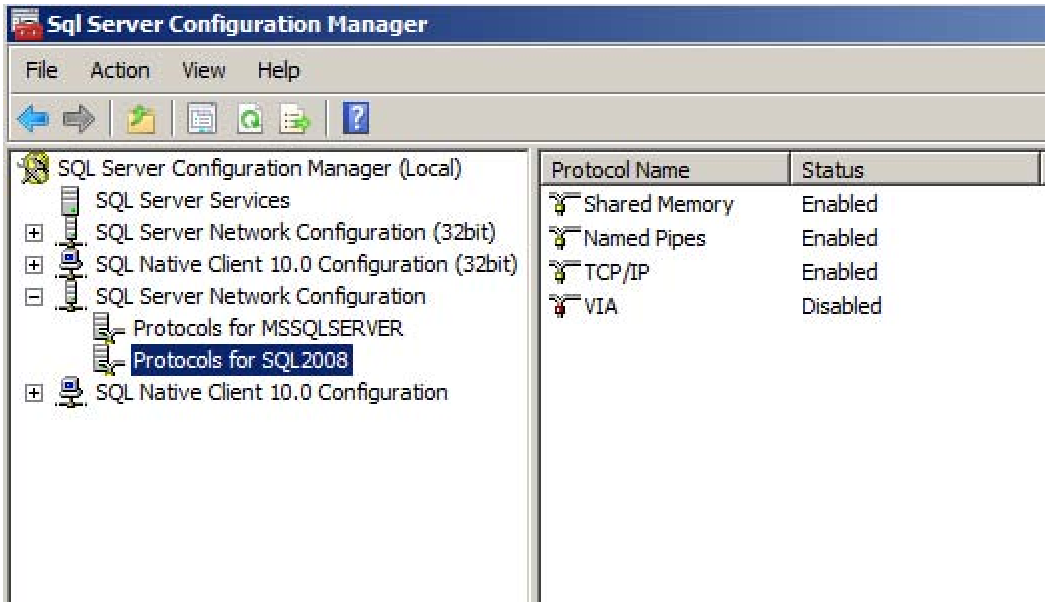
1. Select Start > Programs > SQL Server 2005 > Configuration Tools > SQL Server Surface Area Configuration.
2. Select Surface Area Configuration for Services and Connections.



3. Select SQL2005 > Database Engine > Remote Connections.
4. Select Local and Remote connections and Using both TCP/IP and named pipes.
5. Click OK.

To change SQL Server v2008 settings

1. Select Start > Programs > SQL Server 2008 > Configuration Tools > SQL Server Configuration Manager.
2. Select SQL Server Network Configuration > Protocols for SQL 2008.



3. Make sure TCP/IP and Named Pipes are enabled.

Install Sage 200 CRM V7.0 SP1

1. On the CRM Web Server install Sage 200 CRM 7.0 SP1. Open the Sage 200 CRM folder on your Sage 200 v2010 DVD.
2. Click the Setup.exe file.
3. Follow the on screen instructions.
4. When prompted, enter your Sage CRM details and click Next.

   When the installation is complete your CRM installation will be version 7.0 SP1.

If your Sage 200 CRM v6.2 has been integrated with Sage 200, please continue with the following section Upgrade you database to Sage 200 CRM v7.0 SP1.

If you have never integrated Sage 200 CRM with Sage 200, continue with the section Create and configure the new integration on page 174.

Upgrade your database to Sage 200 CRM v7.0 SP1

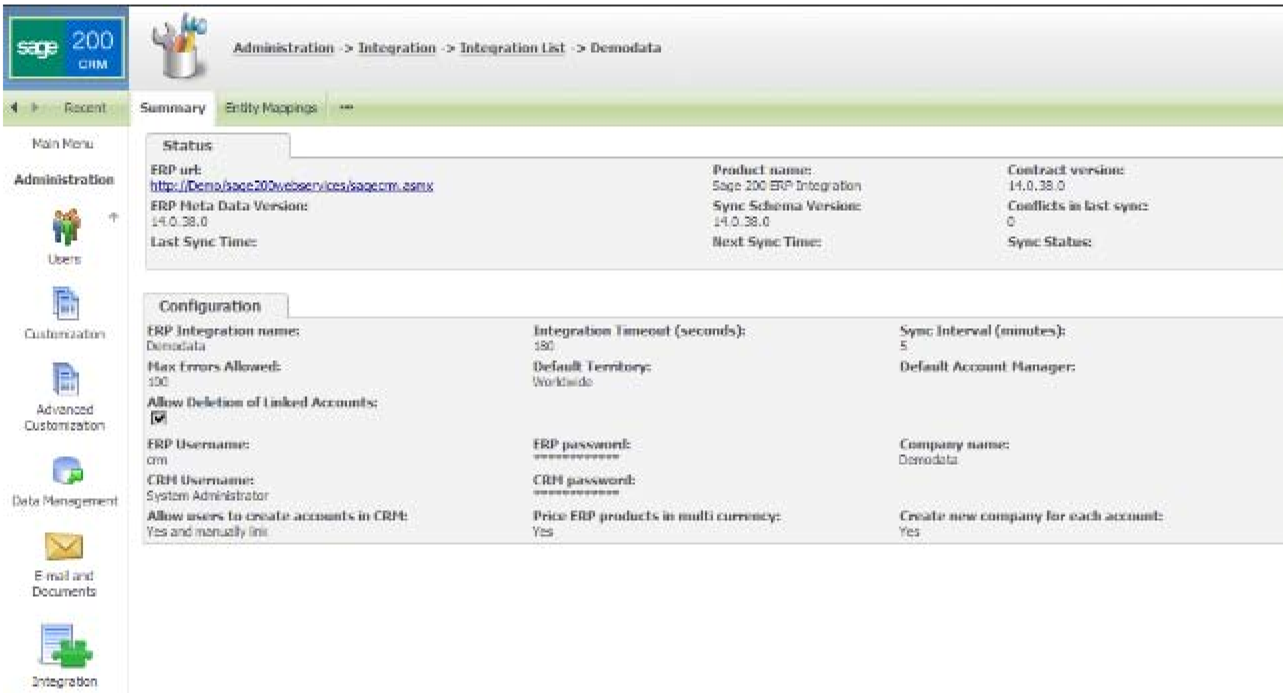
Before you run your first synchronisation in Sage 200 CRM v7.0 SP1, you must run the upgrade SQL script to format your Sage 200 Accounts data so that it is visible in Company details.

1. From the Sage 200 v2010 DVD, select Sage 200 CRM > Upgrade folder.
2. Run the 2009-2010_Upgrade SQL script against your CRM database.

Synchronise your Sage 200 CRM v7.0 data

1. Log on to Sage 200 CRM v7.0 SP1.
2. Select Administration> Integration> Integration List.

   The upgraded integration details are still displayed. Some of the features such as Created Companies are now set to Yes.



3. Open the Integration Setting that you have created.
4. Click Immediate Sync.

   The synchronisation begins. The time it takes to complete the synchronisation depends on the size of your Sage CRM and Sage 200 Accounts databases.

Create and configure the new integration

You must then configure a new integration to allow the creation of accounts for each customer and supplier.

1. Open Sage 200 CRM and click Administration.
2. Click Integration > Integration List.
3. Select the name of the new integration that you have set up. The Configuration screen appears.
4. Enter the following information:
   - Integration Timeout (seconds)

This is the length of time that CRM will wait for a response from the Sage 200 Web Service to return a response. The recommended setting is 300 seconds (5 minutes).

- Sync Interval

  This is the time taken for each synchronisation to start. If a synchronisation is started manually, then the next synchronisation will take place the number of minutes specified from then. It is worth taking the following two factors into account:

  - If a setting is chosen where a synchronisation takes place frequently, there will be a greater load on the server.
  - If the synchronisation takes place less frequently, the amount of data available within CRM will not be as high.

Note: If the Sync Interval is set to zero, there is no delay between synchronisations.

- Create New Company With Each Account
  - If you select Yes then each account that is created by the synchronisation with Sage 200 Accounts will automatically have a linked CRM company record created along with it.
  - If you select No (the default option), then no linked company will be created.

We recommend that if this is the first integration between Sage 200 CRM and Sage 200 Accounts, this setting should be set to Yes. If not (i.e. an upgrade has taken place), we recommend that this setting is set to No until after the first synchronisation has taken place. Once this has run, this setting should be changed to Yes.

Note: A linked company is only created when an account is first synchronised. If this setting is set to No and an account has been synchronised without a company, then changing this setting to Yes will not subsequently create a company on the next synchronisation. Hence, if company records are required, this option must be set to Yes.

- Default Territory

  This is the territory that will automatically be assigned to every new account created by the synchronisation. The default territory is Worldwide.

Note: Orders and quotes are created using the same territory as their parent account.

- Default Account Manager

  The selected user will automatically be assigned as the account manager for any new accounts that are created via the synchronisation. The primary team of the selected account manager will be used as the default team of the new record. This is not set as default.
- Allow users to create accounts in CRM

  This setting determines how accounts should be created and linked to the Sage 200 Accounts system. Choose from the following options:
  - Disable

    Accounts may not be created within CRM.
  - Yes and No Link

    Accounts created within CRM will not get linked to Sage 200 Accounts.
  - Yes and Manually Link

    The account will only be linked to Sage 200 Accounts once the Link Account button is clicked within the Account Summary screen and the next synchronisation is run (this is the default setting).
  - Yes and Automatically Link

    The account will automatically be linked once the next synchronisation is run.
- Allow Deletion of Linked Accounts

  This allows the System Administrator to override normal user security options in order to delete any accounts in CRM that are linked to Sage 200 Accounts. The default option is set to true (checked).
- Max Errors Allowed

  This is the maximum number of errors that a synchronisation can report before the synchronisation is stopped. The default value is 100.
- Price Sage 200 Accounts products in multi-currency

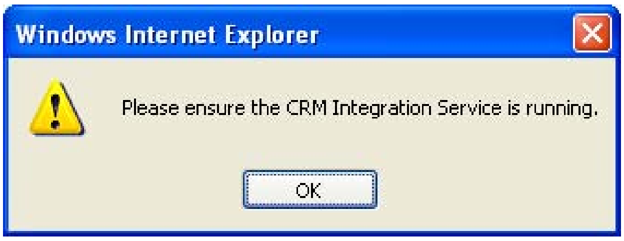
  We recommend you ensure that this is set to Yes.

  If you select Yes, the products can be selected on a quote or order even if they are not priced in the same currency as the account, quote or order.

  The default setting is No.

5. Click Save to apply these changes to the integration.
6. Click Enable.

   A warning prompt appears.



7. Click OK to continue.

Troubleshooting upgrading an existing integration

ISO currency warning

When you try to set up the integration you may get a warning about having currencies that are not ISO currency codes.

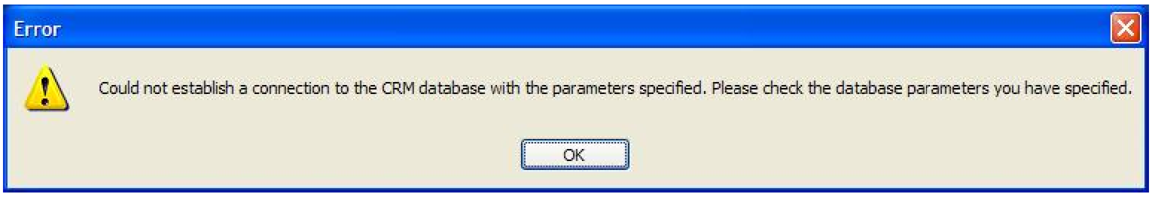
In this case you will need to change any currency symbols you are using to ISO currency codes.

1. Open Sage 200 CRM.
2. Select Administration > Data Management > Currency Configuration.
3. Check if your base currency is using an ISO currency code. If not, click Change.
4. Change the base currency symbol to None.
5. Click Save.
6. Select Administration > Data Management > Currency.
7. Select the currency Description hyperlink for each currency in turn.
8. Change the currency symbol for each currency to the ISO currency code. For example, $ may become USD for US dollars or CAD for Canadian dollars.
9. Change the base currency back to the original value.

Database test connection messages

On testing the database connection you may receive one of the following messages. See below each message for an explanation of what this means and how you can resolve it.

Could not establish a connection



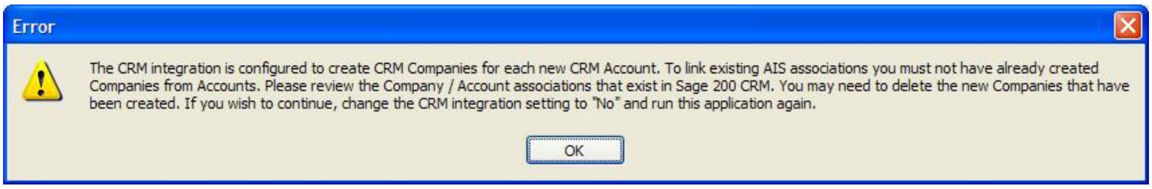
If you see this message, check the following:

- Check the server name is correct.
- Check the username is a SQL login with access to SQL on the named server.
- Check the password is correct for the user.
- Check the database exists on the named server and that the username has access to this database.

If these settings look correct, use SQL Management Studio to check your settings. When logging into the SQL server, use SQL Server authentication (not Windows authentication).

The server name is displayed on the log in screen, enter your SQL username and password. Next, check that you have access to the database you are trying to upgrade.

CRM integration is configured to create companies

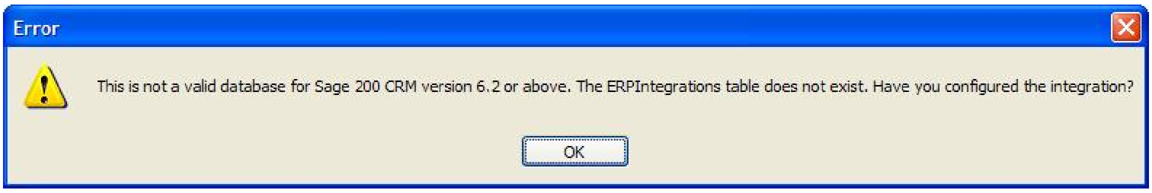


The CRM integration is configured to create companies on synchronisation.

If you are upgrading from a previously integrated installation, companies will already exist. When the integration runs the first time, you will create duplicate companies for each account.

After the first synchronisation, use the merge company functionality to merge the duplicated companies.

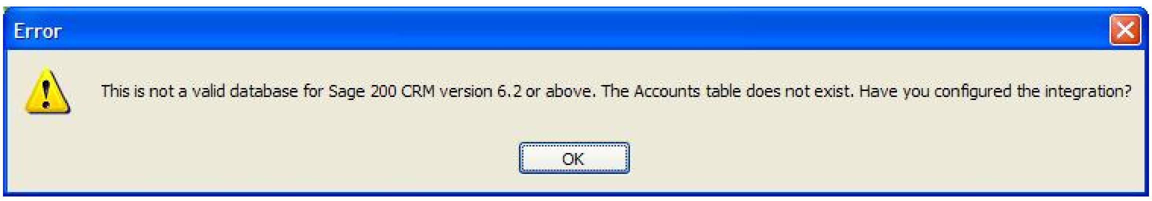
Not a valid database



A table called ERP integrations cannot be found in the CRM database. This table is created as part of the installation of the integration service.

Check you have set up the integration in Sage 200 CRM and that the synchronisation has run successfully.

Not a valid database



A table called Accounts cannot be found in the CRM database.

This table is created as part of the installation of the integration Service.

Check you have set up the integration in Sage 200 CRM and that the synchronisation has run successfully.

Contains no data from any previous integration

Integration details from Sage 200 v3.5, v4.1, v5.0 or v5.1 could not be found in the CRM database.

This message appears if the database has not previously been integrated using the Sage 200 suite integration.

You can only upgrade previously integrated installations.

Sage 200 CRM takes a long time to synchronise accounts or the synchronisation fails with a timeout error

If you are running the Sage 200 CRM synchronisation on a machine that does not have Internet access, it can take a long time to synchronise accounts or the synchronisation may fail with a timeout error.

This can occur because the web service used to synchronise accounts tries to check for revoked certificates online. To speed up the synchronisation, it is possible to turn off this check.

Important

This setting should only be changed on a PC that does not connect to the Internet. If the PC is later connected to the Internet, the original setting must be restored.

1. Open Internet Explorer.
2. Select Tools > Internet Options > Advanced.
3. Scroll down the Settings list to the Security section.
4. Clear the checkbox for Check for publisher’s certificate revocation.
5. Click OK to close Internet Explorer.
6. Reboot your PC and restart the Sage 200 CRM synchronisation.