



Sage 200 Mobile Setup Guide

Copyright statement

© Sage (UK) Limited, 2010. All rights reserved.

If this documentation includes advice or information relating to any matter other than using Sage software, such advice or information is provided for information purposes only. While Sage takes responsible steps to ensure the accuracy and completeness of such information, it can only be general in nature. You should therefore take appropriate steps to ensure it is correct and relevant to your circumstances. You should also consider taking professional advice when appropriate, for example to ensure that the results obtained from using the software comply with statutory requirements.

No part of this documentation may be copied, photocopied, reproduced, translated, microfilmed, or otherwise duplicated on any medium without prior written consent of Sage (UK) Limited, publisher of this work.

Use of the software described in this documentation is subject to Sage (UK) Limited's Licence Agreement enclosed with, or displayed by, that software.

Sage, the Sage logo, and other Sage logos and brands are either registered trademarks or trademarks of Sage (UK) Limited, or its holding company, The Sage Group PLC. All other marks are trademarks or registered trademarks of their respective owners.

Sage (UK) Limited

North Park

Newcastle upon Tyne

NE13 9AA

Issue date: 17/06/2010

PBN no.: 4126

Contents

Set up Sage Mobile	4
Activate Sage Mobile.....	5
Set up Mobile access for users.....	8
Sage Secure Gateway.....	10
Configure Mobile with CRM.....	11
Install Sage Mobile on a phone.....	12

Sage 200 Mobile Setup Guide

Set up Sage Mobile

To set up Sage Mobile, you will need to:

- [Activate Sage Mobile](#) on your Sage 200 server, using System Administration.
This will configure the secure connection to your server for your Sage Mobile users.
- [Set up Mobile access for Sage 200 users](#).
Choose which users have access to your data using Sage Mobile.

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

- [Configure the CRM data source](#) in System Administration.
- Enter each user's *passport membership number* in CRM.

Activate Sage Mobile

» About activating Sage Mobile

Activating Sage Mobile configures your connection to the Sage Gateway server, and creates a subscription based on your licence key. After you have activated Sage Mobile, you can [set up Mobile access for users](#).

» Before you begin

Before you can activate Sage Mobile, you must have:

- ✓ Created a *Sage Passport*.

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

To get a Sage Passport, click the [Create New Passport](#) link.

To activate Sage Mobile

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.

 **Open:** Mobile > Setup.

Sage Mobile

Mobile Administration

1 Sign In 2 Connect 3 Activate

Please sign in with your Sage Passport to configure Sage 200 Mobile.

1 Sign In [Create New Passport](#)

You are not logged in to the Sage Passport Server.

2 Connect

The Sage Gateway is currently connected.

3 Activate

The Sage 200 Mobile Service has not been fully activated.

Links

Links for configuring Sage 200 Mobile [Update Mobile Content](#)

1. Sign in with your Sage Passport.

» [How to sign in](#)

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

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

» [Enter proxy server 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.
-

3. Activate Sage mobile.

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

Note: You must have administrative privileges on the machine. If the Sage 200 File server and Web 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

» Before you begin

To enable Mobile access for a user you must have:

- ✓ Activated Sage Mobile in System Administration.
- ✓ Created a Sage Passport for the user(s).

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

To get a Sage Passport, there is a link next to the sign in area to create a new passport.

To set up Mobile access for a user

 **Open:** Users.

1. Right-click the user and select *Properties*, then select the *Mobile Access* tab.
2. Sign in with your Sage Passport.

» How to sign in

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

3. Enter the passport details of the user for whom you want 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 CRM, this number must also be entered in the user's settings in CRM.

4. To provide the user with Sage 200 Mobile access, enable *Allow user to access Sage 200 using a mobile 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 Mobile application.
-

Note: To send a message, you need to have first set up the email server settings in *Messaging*.

5. Click *OK* to close the user properties.

-
6. If you are using CRM with Sage Mobile, you will also need to [set the user's passport number in CRM](#).

Sage Secure Gateway

The *Sage Secure Gateway* provides a secure connection between your mobile devices and your Sage 200 company information. The gateway server is hosted by Sage, and the *Sage Gateway Client* application is normally installed on your Sage 200 server.

Note: Do not edit the configuration details in the Sage Gateway Client. The Sage Gateway Client will be configured for you by System Administration when you [activate Sage Mobile](#), or make any changes such as adding a user.

Sage Secure Gateway Client

The Sage Gateway Client is installed on the Sage 200 Application Server. If the Gateway Client control panel is running, an icon is displayed in the Windows taskbar and indicates the gateway status.

-  The gateway is running.
-  The gateway is in the process of connecting.
-  The gateway is disconnected (stopped).

What do you want to do?

» Restart the Sage Gateway

1. Open the Sage Gateway client.
 - Right-click the Sage Gateway icon () in the Windows taskbar, then select **Open Control Panel**.

The **Current Service Status** indicates if the Sage Gateway is running.

Note: If you stop the service, we recommend that you wait 30 seconds before you start it again.

2. To start the service, click **Start Service**.

The service will usually take a short amount of time to start. When it is running, it will be indicated in the **Current Service Status** and by the taskbar icon ()
-

Configure Mobile with CRM

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

- Configure the CRM data source in System Administration.
- Enter each user's *passport membership number* in CRM.

Configure the CRM data source



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

1. Right-click the CRM data source and choose Properties.
2. Ensure 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.

Note: If you change the connection string after starting to use Sage Mobile, you will need to restart IIS for the changes to take effect.

Set a user's passport number in CRM

For each CRM user that will use Mobile, you will need to set their *passport membership number* in their CRM user settings.

Note: The passport membership number can be found in the [user properties](#) in System Administration.

To set a user's passport membership number in CRM:

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

Note: This setting will only be available after you have set up the CRM integration with Sage 200.

4. Click Save.

Install Sage Mobile on a phone

To install Sage Mobile on a phone, the phone's owner needs to download the Sage 200 Mobile application from the Sage website onto their phone.

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

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