

## SAGE 50 CHECKLIST

The check list must be completed before we can proceed with any update. Incorrect information may result in additional costs.

Sage 50 Software (details found in help and about)			
Is it a Standalone installation? (Y/N)			
How many PC's do you require Sage to be installed on?			
Where will the data be stored?			
How many Sage Companies do you have?			
Serial Number		Activation Key	
Account Number		Version number	
Manager Password for each company: <i>Please email us additional password if different from company listed</i>		1. 2.	
If updating, have you checked your data to ensure there are <b><u>No errors or warnings</u></b> . (these can cause corruption after the upgrade which may require a data fix). Please contact suport@pimbrook.ie for a quote for a data fix.			
Sage Drive/Remote Data Information			
Do you have Sage Drive/Remote Data Access and how many?			
First Name		Surname	
Unique Email			
Please check and confirm if you have the system requirements for your Sage to install on your PC's or Server? (Please find attached the system requirements)			Y/N
Operating Systems			
Hardware Requirements			
Office Integration			
Internet Connection			
Antivirus Software			
Internet Browser			
Additional Information			
All windows updates are Installed			
Microsoft .Net Framework Installed (see version below)			
Server Re-booted prior to upgrade			
Have you informed your IT that you are upgrading your software to the latest version?			
Do you have or can you get Administrator Access to all PC's Including the Server? (Y/N)			
Do you have any third-party software that links to Sage (Sage add-on's)? (Y/N) <i>If you have answered Yes, you need to contact the Third party Software to see if it is compatible with the Version you're upgrading</i>			

Contact Details on the Day of Upgrade			
<u>Contact Name</u>		<u>Mobile Number</u>	
<u>IT Contact Name</u>		<u>IT Contact number</u>	
Anydesk Details (if applicable)			
Anydesk Server		Anydesk Server Number	
Anydesk Name 1		Anydesk Number	
Anydesk Name 1		Anydesk Number	
Anydesk Name 2		Anydesk Number	
Anydesk Name 3		Anydesk Number	
Anydesk Name 4		Anydesk Number	
Anydesk Name 5		Anydesk Number	
Anydesk Name 6		Anydesk Number	
Anydesk Name 7		Anydesk Number	
Anydesk Name 8		Anydesk Number	
Anydesk Name 9		Anydesk Number	
Anydesk Name 10		Anydesk Number	
Anydesk Name 11		Anydesk Number	
Anydesk Name 12		Anydesk Number	
<p><b>I can confirm that I have read and agree to the above questions and answers to the best of my knowledge. I agree to Pimbrook Software's terms and conditions and the completion of the above and any logon/Site visits are required and will be charged accordingly.</b></p>			
Authorized by:		Position:	
Company Name:		Date:	

## SYSTEM REQUIREMENTS – SAGE 50 v27

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### Supported Operating Systems

*NOTE: Microsoft support for Windows 7, Windows Server 2008 and Windows Server 2008 R2 ended on 14 January 2020. We therefore recommend that you don't install on those operating systems.*

All 32-bit or 64-bit variants of the following operating systems:

Note: Please ensure all the latest Microsoft Service Packs and Updates are installed.

- Windows 10 (build 1709 or later)
- Windows 8.1
- Windows 7
- Windows Server 2019 (except Windows Server 2019 Essentials)
- Windows Server 2016 (except Windows Server 2016 Essentials)
- Windows Server 2012 (except Windows Server 2012 Essentials)
- Windows Server 2012 R2 (except Windows Server 2012 R2 Essentials)
- Windows Server 2008 (not supported on Small Business Server/SBS 2008)
- Windows Server 2008 R2 (not supported on Small Business Server/SBS 2008/Server 2008 Standard FE)

You must also ensure you install all the latest Microsoft service packs and updates available.

### **Other operating systems**

Sage Accounts is not tested on virtual environments, for example, Hyper-V servers. We therefore can't guarantee Sage Accounts will install and work correctly on these environments.

Most Sage software must be installed on a Windows operating system, if you use a Apple Mac, you can use Bootcamp to install Windows, and therefore, our software.

It is not possible to store Sage Accounts data on non Windows operating systems, this is because you have to install the data service to access the data.

## Hardware Requirements

Minimum Required	Recommended for Improved Performance
2 GB RAM (4 GB RAM if running a 64-bit operating system)	16 GB RAM
2 GHz processor	2.5GHz processor or higher with multiple cores (e.g. Intel i5 or i7).
5 GB of free disk space	50 GB of free space using "Solid State Disks" (SSD)
1Gbps network (100mbps minimum).	1Gbps network (hardwired)
Screen resolution between 1024 x 768 and 1920 x 1080 - this applies to 4k and hi-res monitors	As per minimum
Maximum DPI setting of 125%	As per minimum

***Sage Accounts requires you to install the Sage Data Service on the machine where your data is held. If this isn't possible, you won't be able to share your data on that machine. Although not supported, previous versions may have worked as they didn't use the Sage Data Service. For more information on storing your data on non-Windows operating systems***

## Office Integration

Some features of Sage 50 Accounts interact with and require an installation of Microsoft Office, for example:

- Emailing invoices and reports
- Exporting report and screen lists to excel

Sage 50 Accounts v27 is compatible with the following:

- Office 64 bit versions - In Sage Accounts you can use the File>Microsoft Integration>Contents to Microsoft Excel feature and also run Excel ODBC queries with Office 64-bit. Other features are not compatible
- Microsoft 365 32 bit – desktop version only.

To check if it's the desktop version, Control Panel> Program > Default Programs > Set your default programs> check if Microsoft Outlook is the desktop version.

- Office 2019 32-bit edition – Sage 50 accounts v25.1 and above
- Office 2016 32-bit edition
- Office 2013 32-bit edition
- Office 2010 32-bit edition (except Office 2010 32-bit starter edition)

## Sage 50cloud Accounts only

Sage 50cloud Accounts offers additional functionality using Office 365.

These features require a UK based Microsoft Office 365 Business Premium or Enterprise E1, E3, or E5 subscription or Microsoft 365 Business Premium. Initial setup must be done by a user with global admin rights and a supported license. If you're unsure if you meet these requirements, please contact your Microsoft Office 365 supplier.

The section below confirms the requirements for each element of Sage 50cloud Accounts:

### Sage 50cloud Intelligence

- Excel desktop edition 2013, 2016, 2019
- Excel online

### Sage Contact

- Outlook desktop edition 2013, 2016, 2019
- Outlook online (accessed via browser)

Sage Contact does not currently support the native mobile applications for mobile devices.

Further information:

- [Microsoft Office 365 system requirements](#)
- [Microsoft Office compatibility](#)

***Microsoft Office 2007 and 2010 are no longer supported by Microsoft, therefore we're limited in the support we can offer. We can help with basic steps, however if these don't work, you should upgrade your software to a more recent version.***

## Internet Connection

A broadband Internet connection is essential to keep your Sage software up to date, and to take full advantage of features such as [Remote Data Access](#) and synchronising data with Office 365.

- Recommended minimum download speed: 4Mbps
- Recommended minimum upload speed: 2Mbps

## Antivirus Software

To optimise performance your antivirus software should be configured to [exclude Sage files](#) from its checking routines

## Internet Browser

Internet Explorer version 11 or above.

To check, open Internet Explorer, select **Tools** then choose **About Internet Explorer**.

## Microsoft .Net

Microsoft .NET Framework 4.7.2 is required.

## Sage Capture app

[Sage Capture](#) is tested on the following operating systems, but may work with earlier versions:

- iPhone 5 or above running iOS 9.3 or later.
- Android 5.0 (Lollipop) and above.