

International Accounting Day

Quick tips to protect your data

Presented by Jacqui

This webinar starts at 2pm – You should currently hear background music. If you cannot hear sound, try disconnecting and reconnecting to the webinar.

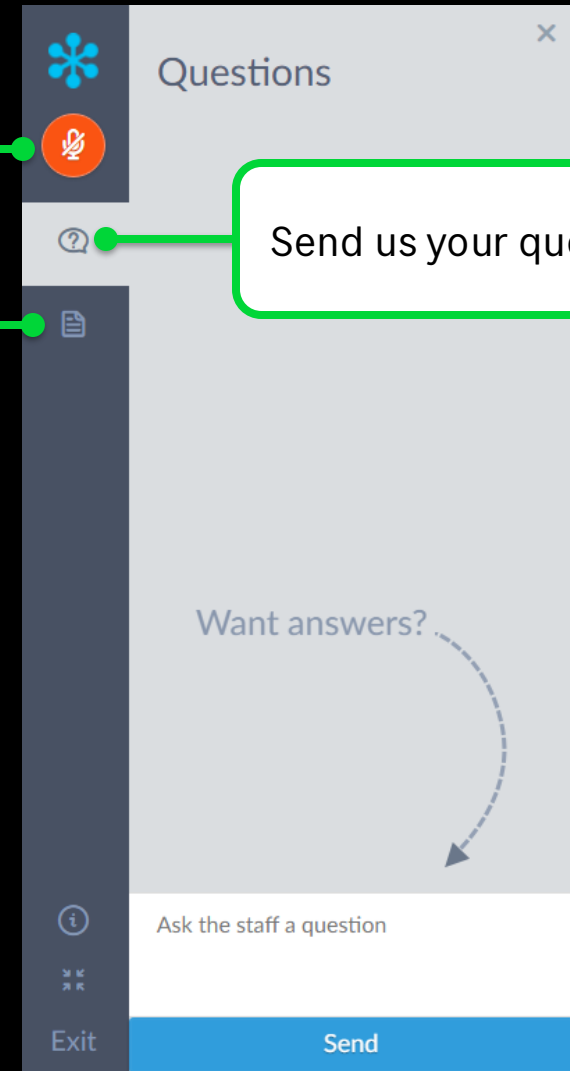


Housekeeping

Your microphone is muted automatically

Download a handout

Send us your questions



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International Accounting Day 2024

Earn your digital badge by attending at least 4 different quick learns AND one of our quiz sessions.

- #1 – Getting paid – Time saving opportunities.
- #2 – Work smart – Automating everyday transactions.
- #3 – Reporting made easy
- #4 – Quick tips to protect your data
- #5 – Shortcuts for success

**International
Accounting Day
The quiz**

**Thu 7 Nov 2pm
Tue 12 Nov 11am**



Register now

What are we covering in today's **webinar**?

- **Checking your data**
- **Errors, warnings and comments**
- **Backup**
- **Schedule backup**
- **Restore into practice data**

Checking your data

Check the validity of your data files

This should be run regularly especially before taking a backup or restoring your data.

Results are categorised as follows

Errors – You must stop processing until they have been resolved

Warnings – We recommend fixing these before continuing

Comments – These are for information only

Errors, warnings and comments

A - Z index of Check Data errors, warning and comments

When you [check your data](#), if you receive any errors or warnings, we recommend you fix these before continuing.

Comments are for information only, although you may want to check these from time to time.

If you use Remote Data Access or Sage Drive, you can only use the recovery tools at the [main site](#).

Sage 50 Accounts v26 and above - data corruption can be fixed automatically in your software, please follow the [steps in your software to fix data corruption](#).

NOTE: We recommend [taking a backup of your data](#) before continuing and making a note of where you save it.

To leave feedback on any of the errors in the A - Z list, please click [here](#)

A - Z list.

Please search for the error, warning or comment that appears in the File Maintenance Problems Report and follow the steps given.

Show entries

Search:

Title	Type	Next steps
Account (bank account) balance out by (amount of the difference)	Error	Fix now >
Account (bank account) foreign balance out by (amount of the difference)	Error	Fix now >
Account (bank account) has a bad transaction pointer	Error	Fix now >
Account (bank account) index is duplicated	Error	Fix now >
Account (bank account) index is out of sequence	Error	Fix now >
Account (customer or supplier account) has a bad transaction pointer	Error	Fix now >
Account (customer or supplier account) has an invalid account status	Warning	Fix now >

Schedule backup/ Backup manager

Schedule backups to run automatically even if the software is not open.

The backup can be scheduled to run at your preferred time of day and will also check the data.

Check data results can be viewed.

Schedule backup can be set up for multiple companies.

Setup a scheduled backup in File> Schedule backup.

Automate your checkdata

The screenshot displays the Sage Accounts Backup Manager interface. The left sidebar contains navigation options: Overview, Settings (selected), Users logged in, Check data results, and Backup files. The main window is titled 'Sage Accounts Backup Manager' and is divided into several sections:

- Check data and back up schedule:** This section allows users to choose automated processes. It includes checkboxes for 'Enable automated check data' and 'Enable automated backup'. There are two scheduling options: 'Run once per day' (selected) with a 'Schedule at:' dropdown set to '17:00', and 'Run more than once per day' with a 'Schedule every:' dropdown set to '1 hour' and a 'Starting from:' dropdown set to '00:00'. A note states: 'The same schedule and settings apply to all companies selected below.'
- File types to include in the backup:** A list of file types with checkboxes: Accounts data (checked), Transaction Attachments, Reports, Layouts, Record Attachments, Images, Archives, TMail database, and HMRC submissions.
- Sage 50 Accounts Microsoft 365 Location:** A section with a 'Sage Business Centre' button and instructions: 'Companies selected to directly backup to Microsoft 365 will be stored in OneDrive. To retrieve the backup files, add users, manage user access and install Microsoft 365 apps, click Sage Business Centre.'
- Backup location:** A section with a dropdown menu set to 'C:' and an 'Edit folder' button. Instructions state: 'You can store your backups on any fixed drive on 127.0.0.1, or in any cloud storage folders listed below. To edit the path or add a sub-folder, click Edit folder.'
- Sage 50 Accounts OneDrive email notifications:** A section with an 'Enable email notifications' checkbox (unchecked) and a 'Manage email addresses' button. Instructions state: 'To receive an email notification regarding your Microsoft 365 cloud back ups, enable notifications and, to add the required details.'
- Server disk space limit:** A section with instructions: 'New backup files will not be created once the server's hard drive runs out of space. By default, 20 GB of space will be left free on the server's hard drive, but you can change this below.' It includes a text input field with '20' and a 'GB' label.

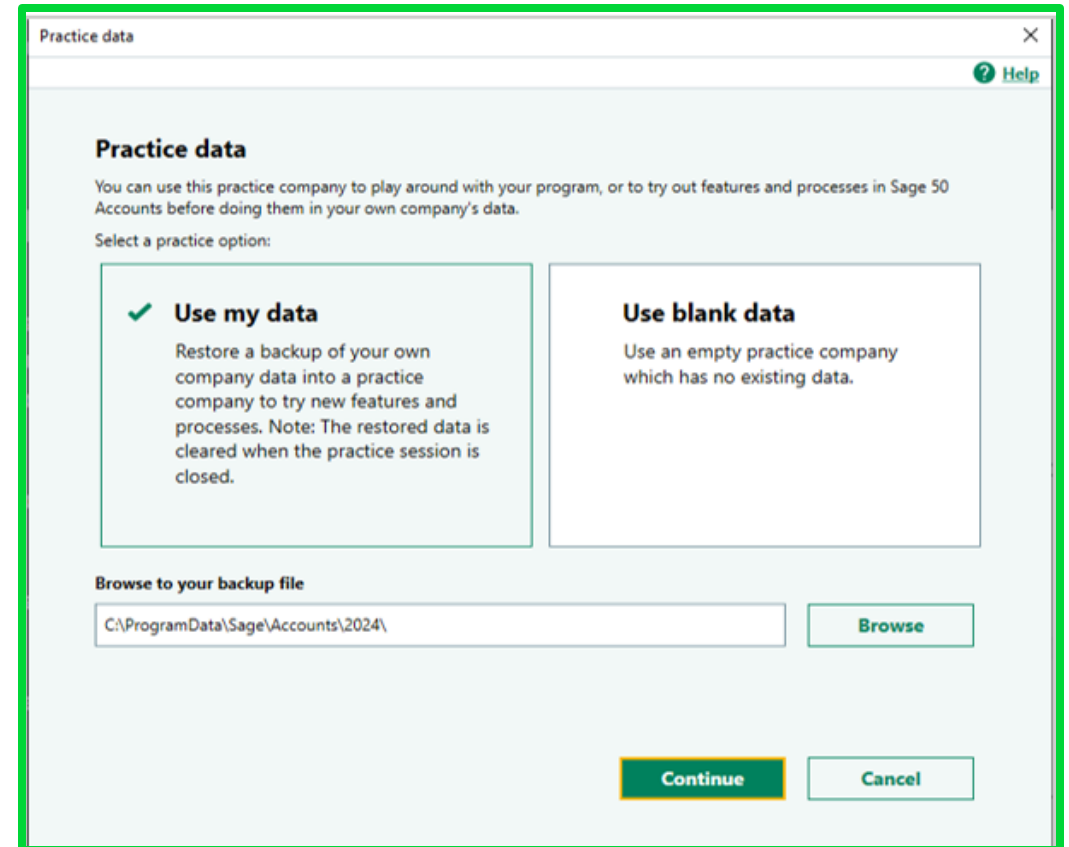
At the bottom of the window, there are 'Refresh', 'Save', and 'Cancel' buttons.

Restore into practice data

V30.1 introduces the option to restore backups into the practice data.

Benefits

- Access a copy of your data in a practice environment.
- Run reports.
- Learn processes without impacting live data.
- Other users can continue working in live data.
- Avoid having to re-sync live data via connected services.



Note: The practice data will be cleared and reset on exiting.

Restore into practice data

How will 2FA impact my product?

Scenario 1

Connected Services

(all versions)

- Bank feeds
- Remote Data Access
- Invoice Finance
- GoCardless
- Supplier payments
- Sage Connect

Scenario 2

Introduce AI tools in v31

- *AI tools*
- *Launch of 'Sage Copilot'*

Scenario 3

Get 2FA Ready!

- *Product roadmap*
- *Phased approach*

Summary

- It's important to keep up to date with the latest versions of Sage Accounts to keep on top of security changes and new features.
- Checking your data should be carried out regularly in particular before taking a backup or after restoring.
- Backups and check data can be scheduled to occur on a regular basis and will not interfere with users processing.
- Version 30.1 introduced the restore into practice data feature. Protecting your live data if you need to restore historical backups for viewing purposes.
- 2-Factor authentication becomes mandatory from February. Adding an additional layer of security to your accounts data.

Back up your data

2 Factor Authentication

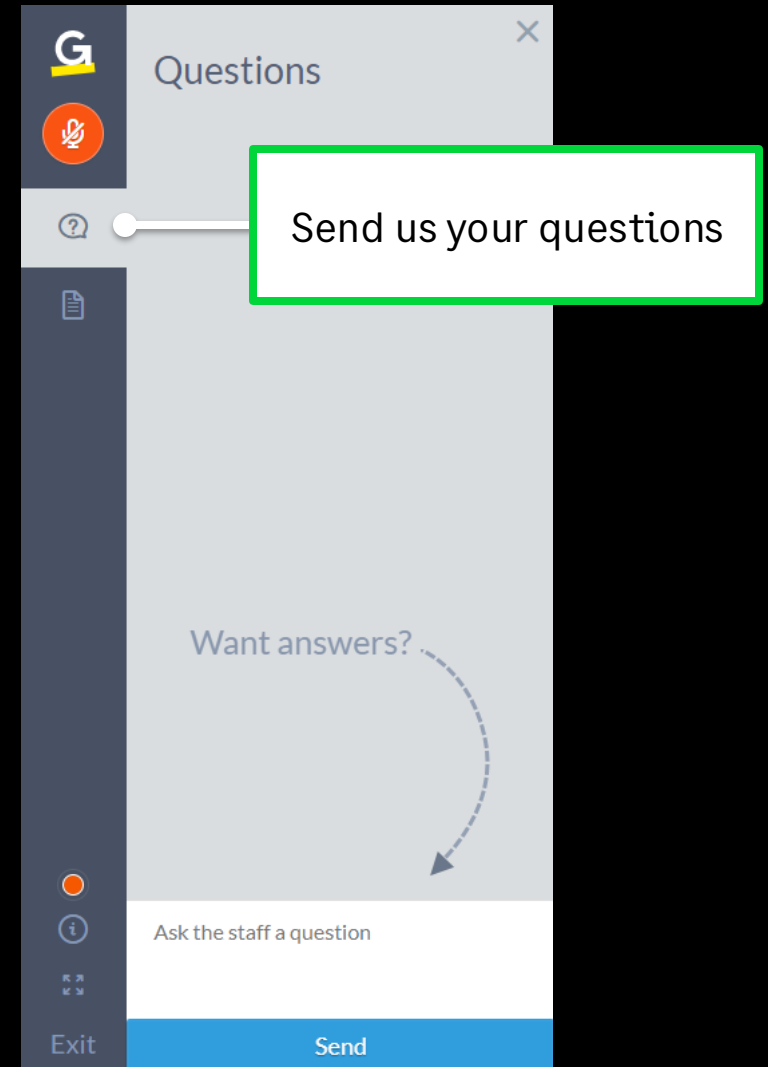
Archive your company data

Questions

Submit your questions in the Q&A now!

Note:

You'll receive an email later today containing links to register for future webinars and to watch recordings, including today's webinar.



Thank you!

Please take a minute to complete the short exit survey as you leave.

You'll receive a follow-up email with links to register for future webinars and watch recordings later today.

