

Sage 50 Accounts

Data Management 2025

Backing up

Presenter: **Abby**

Sage



Sage



**Data
Management
2025**

Sage 50 Accounts

Data Management 2025

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- Backing up
 - The Data Management tool
 - Company archives
 - Clearing your audit trail to remove old transactions
 - Deleting customers, suppliers, nominal codes and bank accounts
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What's covered in today's webinar?

- Importance of backing up
- Manual back up
- How to restore a backup
- Schedule back up
- Further support + Q&A



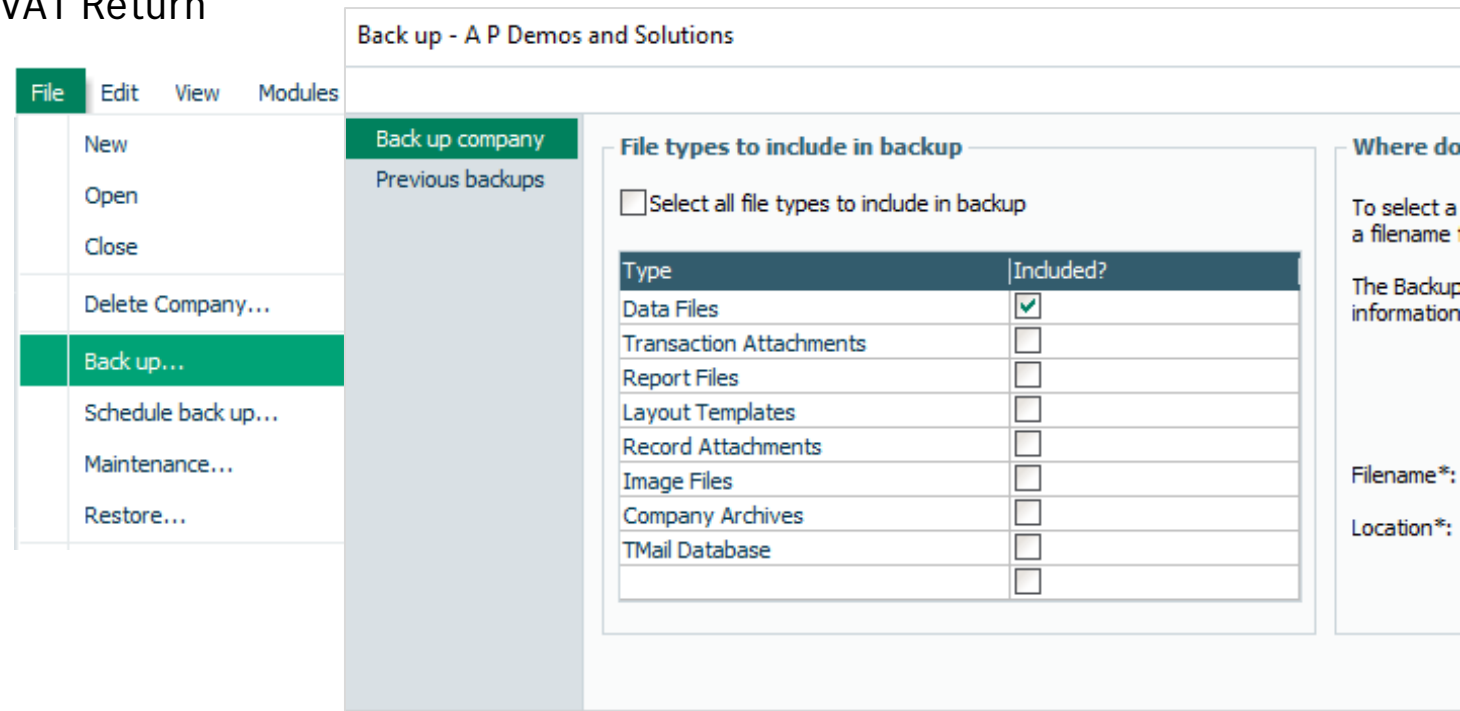
Importance of backing up

The backup process takes a copy of all the files that make up your company including logon name and passwords and consolidates them into one compressed file. This can only be accessed by restoring the backup into Sage 50 Accounts.

**Back up your
data**

- If a process does not go as expected i.e. Year end, VAT Return or importing transactions or records.
- Disaster recovery.
 - Hardware issues.
 - Virus.
- Data corruption.

Note: Sage **do not** store copies of your data so it's really **important** to back up any companies you have on the accounts software.



Manual back up

- Data Files – normal day to day processing.
- Transaction Attachments – any documents you have added to the batch supplier invoice.
- Report files and Layout templates – if you have made any changes to customised layouts or reports.
- Record Attachments – if you have added any attachments to customers, suppliers, products, bank, nominal, departments and projects.
- Image Files – if you have added image files to your products or services.
- Company Archives – when you have taken a company archive.
- TMail database – if you still use this function then you can include this.

Type	Included?
Data Files	<input checked="" type="checkbox"/>
Transaction Attachments	<input checked="" type="checkbox"/>
Report Files	<input checked="" type="checkbox"/>
Layout Templates	<input checked="" type="checkbox"/>
Record Attachments	<input checked="" type="checkbox"/>
Image Files	<input checked="" type="checkbox"/>
Company Archives	<input checked="" type="checkbox"/>
TMail Database	<input checked="" type="checkbox"/>
	<input type="checkbox"/>

Note – A normal daily back up would usually be data files only.

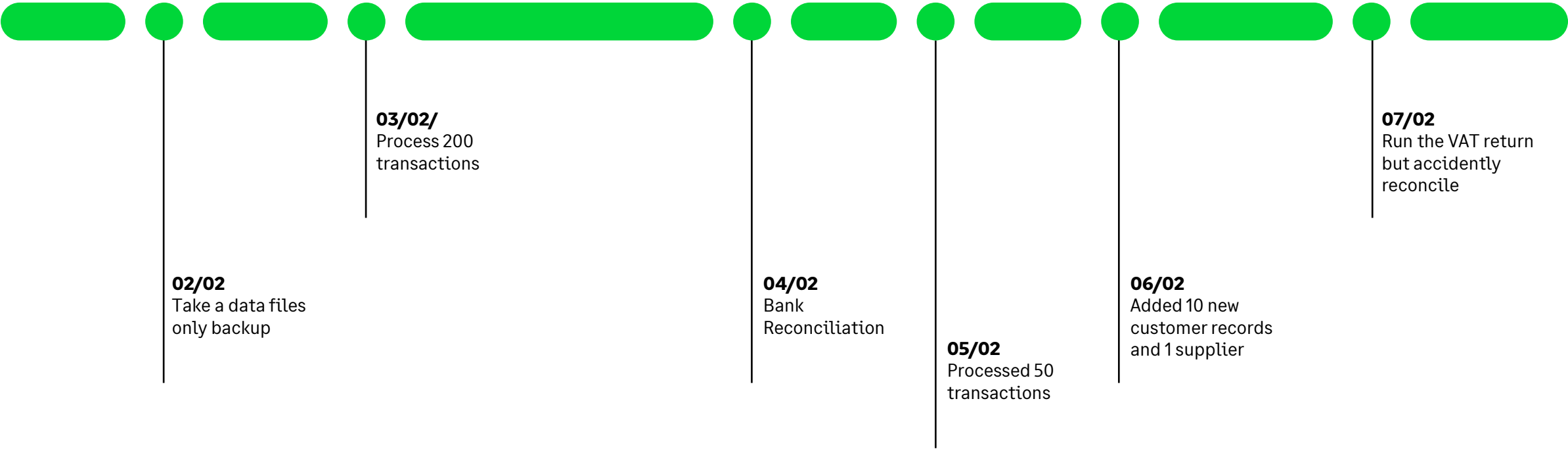
Restoring the backup

- Can restore over the top of live data.
 - **Use with caution as this does overwrite**
- Create a new company by restoring a backup.
 - If you have multi-company licence
- Informs you what is included in the backup selected.
- Log in with existing login details.
- To check your licence go to Help > About > Licence Information.

Restore a backup

The screenshot shows the Sage software interface. The 'File' menu is open, displaying options: New, Open, Close, Delete Company..., Back up..., Schedule back up..., Maintenance..., and Restore... (highlighted in green). The 'Restore' dialog box is open, showing the 'Restore company' tab. The 'Previous backups' list is empty. The 'Which backup do you want to restore?' section contains instructions for removable storage and OneDrive, with a 'Browse...' button. The 'Backup details' section shows 'Company name:' and 'Data version:'. The 'Your backup will be restored to' section shows 'Company name: A P Demos and Solutions' and 'Location: C:\PROGRAMDATA\SAGE\ACCOUNTS\2023\COMPANY.000\'. The 'Restore' button is highlighted in green.

Restoring a backup



Scheduled Back up

Scheduled Back up

Benefits & how it works

- Automates the process.
- Takes place in the background.
- Back up more than one company at the same time.
- Stored on the C drive of the computer where the data is stored.
 - Computer must be switched on, Sage does not have to be open
- Automatically checks data.
 - identify when data corruption occurred
- Only the manager logon can access this option.

The screenshot displays the 'Sage Accounts Backup Manager' application window. The 'Settings' tab is selected in the left-hand menu. The main area is divided into several sections:

- Check data and back up schedule:** This section allows users to choose which automated processes to run. It includes checkboxes for 'Enable automated check data' and 'Enable automated back up', both of which are checked. Below these, there are options to 'Run once per day' (selected) or 'Run more than once per day'. The 'Run once per day' option has a 'Schedule at:' dropdown set to '17:00'. The 'Run more than once per day' option has a 'Schedule every:' dropdown set to '1 hour' and a 'Starting from:' dropdown set to '00:00'.
- File types to include:** This section on the right lists various file types that can be included in the backup, such as 'Accounts data', 'Transaction Attachments', 'Reports', 'Layouts', 'Record Attachments', 'Images', 'Archives', 'TMail database', and 'HMRC submissions'. The 'Accounts data' checkbox is checked.
- Company list:** A table below the schedule section lists the companies to be backed up. It has columns for 'Company name', 'Version', 'Data path on server', and 'OneDrive'. One company, 'A P Demos and Solutio', is listed with version 'v29' and a data path 'c:\programdata\sage\acc...'. The 'OneDrive' checkbox is unchecked.
- Backup location:** This section on the right explains that users can store backups on a local drive or a network drive. It includes a text input field for the path, currently showing 'C:'.
- Sage 50c OneDrive email notifications:** This section at the bottom explains that users can receive email notifications about their Sage 50c Microsoft 365 cloud backups. It includes a checkbox for 'Enable email notifications' (unchecked) and a 'Manage email addresses' button.

A 'Refresh' button is located at the bottom left of the main settings area.

Note: This option should be used **alongside** manual back ups and not as a replacement.

Summary

- Sage **do not** store any copies of your data.
- You can select to do a full back up or specific areas.
- You can check your data without having to back up.
- Restore over live data or into a new company.
 - overwrites live data back to the point of when the backup was taken
- Strongly advised to back up **at least once** a day minimum.
 - frequency is based on how often you process i.e. daily processing then back up daily
- Schedule back up runs the process in the background and also checks the data when the **machine is switched on**.
- Scheduled option can help identify when errors occurred in the data.

Find out more...



[Back up your data](#)


[Check your data is in good health](#)

[Scheduled back up](#)



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