Price Bailey Import Routines for Sage 50

Installation Guide   October 2019

Contents

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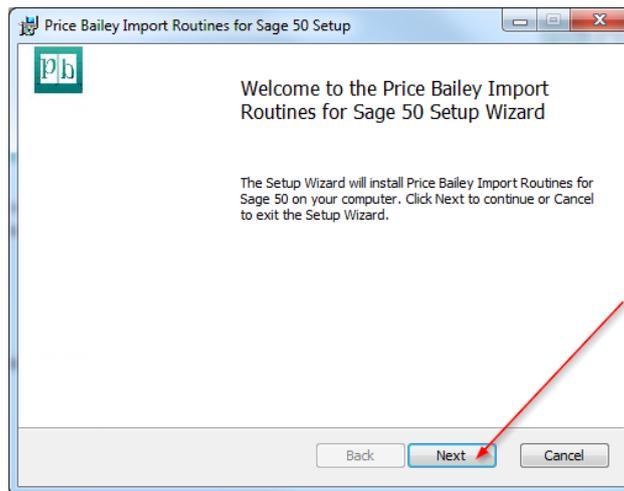Price Bailey LLP, Cambridge Business Park, Tennyson House, Cambridge CB4 0WZ

Installation of PB Import Routines
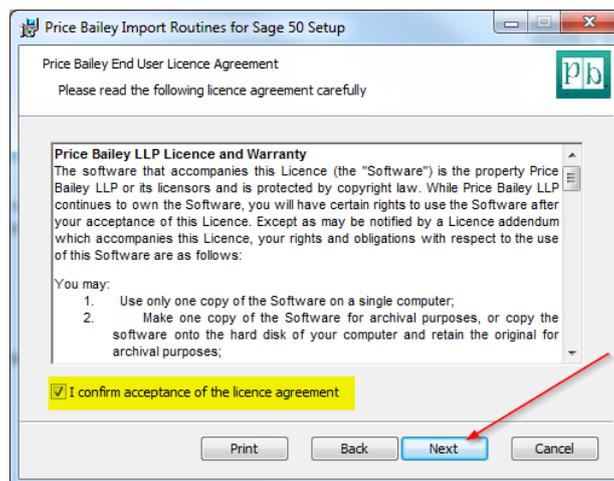
The installation software is supplied as a zip file.
Unzip the file to a new folder. Double click to run the PriceBaileyImportRoutinesInstaller.msi:-
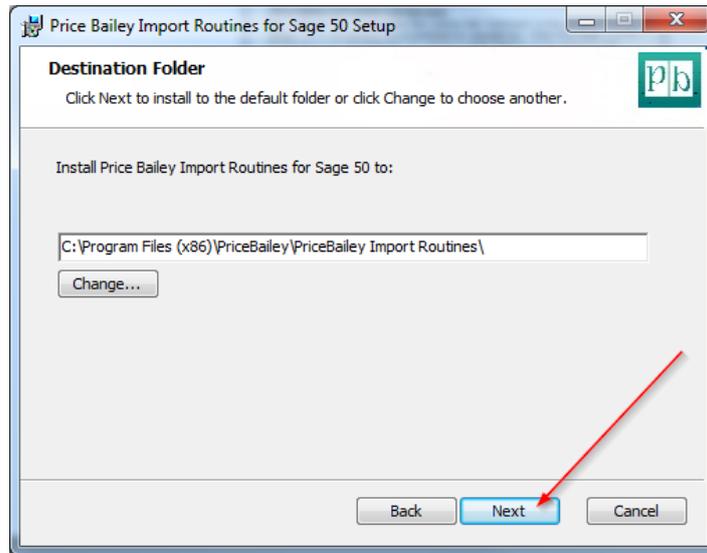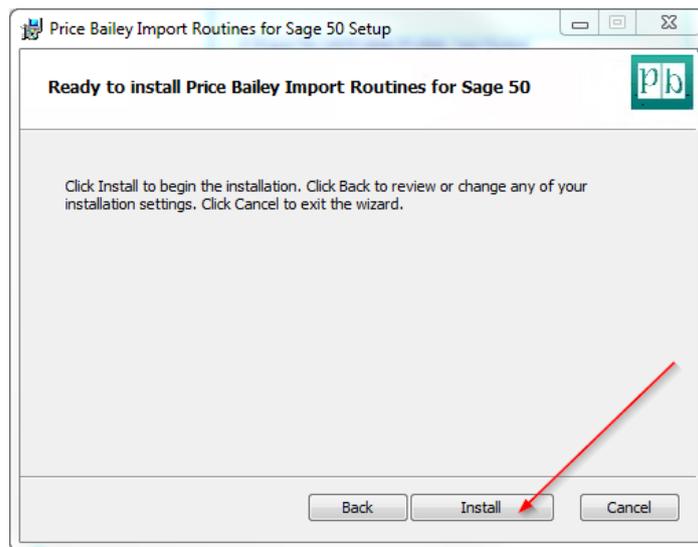

Click <Next> to start the install:-

You are presented with the license agreement. Please read this and click on I confirm acceptance of the licence agreement. Click <Next> to continue with the installation:-
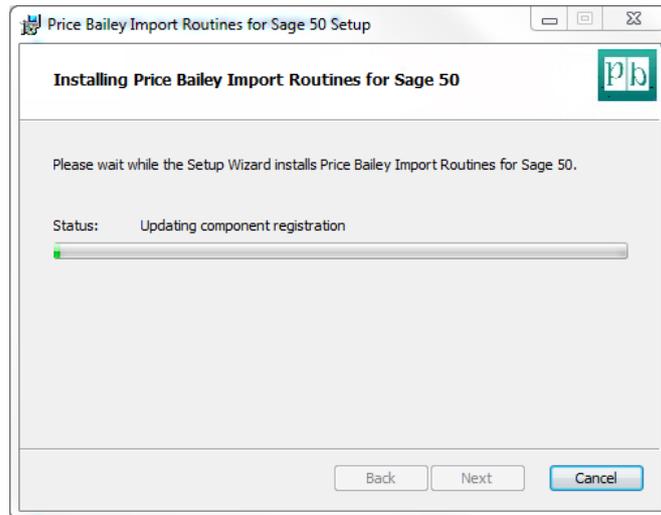
Click <Next> to accept the default destination folder:-

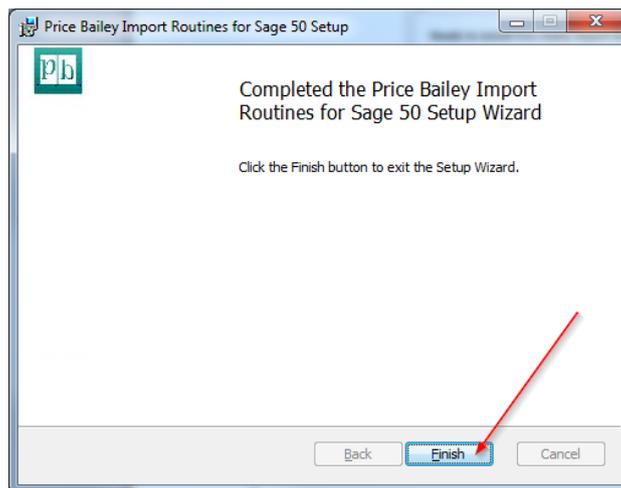Click <Install> to begin the installation:-

*Note:-*If you have UAC (User Access Control) configured, at this point you may get a Windows prompt asking you to confirm you wish to install the software.

The screen displays the progress of installation:-

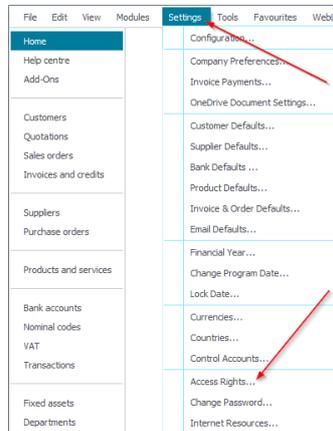Once the installation has completed, click <Finish> to exit the wizard:-

You should now have the Price Bailey Import Routines icon on your desktop:-
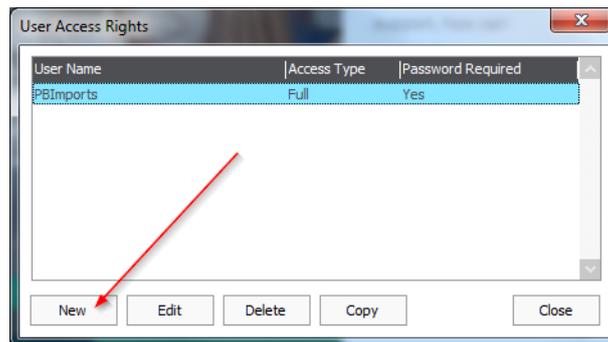
Sage 50 Configuration

Best practice for the configuration of the PBImports module requires you to create a new user in Sage 50.
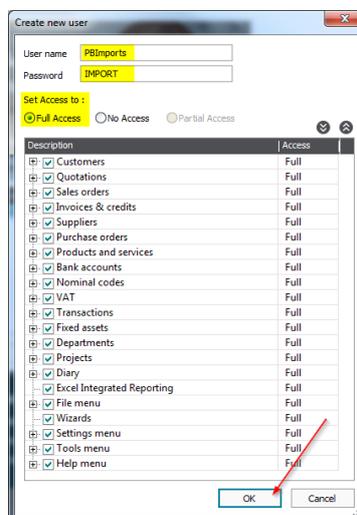
In Sage 50 go to Settings / Access Rights…:-

Click <New>:-

Add the user name of PBImports with a password of IMPORT. Allow Full Access. Click <OK>:-
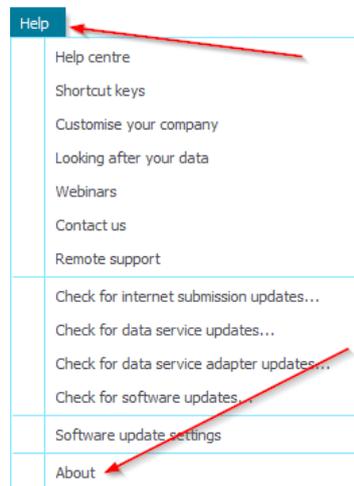
Sage Data Objects.

Sage 50 Version 24 onwards comes with the SDO enabled at install. If you are running a Sage 50 version prior to Version 24 or you are running PB Import on a PC/Server without the Sage 50 client installed you will need to manually install the SDO.

Note:-SDO =Sage Data Objects –the method used by PBImports to connect to Sage 50
See Appendix 1 for instructions on this.

Note Your Sage 50 Settings.

Whilst in Sage 50, note down your serial number and the location of the Sage data that you wish to import into. This information is held under: Help / About:-

You will need the location of the Sage company File Path:-

Configuring PBImport

From the programs menu bar run Import Routines or you can run it from the desktop shortcut icon that was created as part of the install.

The first time PBImport is opened the settings need to be completed.

Connect & Activate Tab

Click on the <Connect & Activate> tab. Enter the path to the Sage 50 data folder, this is normally:-
C:\ProgramData\Sage\Accounts\????. You will then see a list of Sage companies. Select the required company:-

Default Login

Enter the user name and Password for the Sage user that was created earlier:-

Registering the Software

To licence PBImport please send an email to support@pricebailey.co.uk and inform them that you wish to purchase a license for Import Routines. We will then arrange for an invoice to be sent out and an activation key will be issued.

In order to generate an activation key you will need to email the Licence ID to support@pricebailey.co.uk:-

When you receive the Activation Key copy and paste it into the Activation Key field. Click the button labelled <Check Sno>. If the activation key has been successful, an expiry date will appear along with the number of days remaining.

If for any reason you have any errors or the program will not register please let us know at support@pricebailey.co.uk.

Log File Location

Enter the path for PBImports to write any log files to. Tick the box to remember these settings:-

For details on how the program works please refer to the Import Routines Operations manual

Appendix 1 – Enable SDO

Import Routines use the Sage data objects to connect to Sage 50. To obtain a key you will need to follow the instructions shown on the third party activation screen. In Sage select Tools/Activation/Enable Third Party Integration

Public SDO activation keys can be found here:-
https://my.sage.co.uk/public/help/askarticle.aspx?articleid=9342

*Note:-*This will need running on each PC that has Sage installed and needs to access third party integration. Please keep this key somewhere safe for future reference.