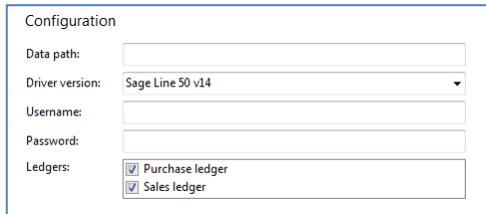


Sage 50 Accounts Addin Guide

This document will guide you through configuration of the Sage 50 Accounts addin. It is expected that you are already familiar with the Address Book and Preview window, and the basic concepts of integration and screen popping using the addins. See the User Guide for these topics.

Configuration



Configuration

Data path:

Driver version: Sage Line 50 v14

Username:

Password:

Ledgers: Purchase ledger
 Sales ledger

On the 'Configuration' group, you need to specify where your Sage 50 data is stored. To find out where this is, go into Sage 50, open the 'Help' menu and click 'About'. A new window will open, you need to click on the 'System Information' tab and then on the 'Directories' menu item to reveal the location of your Sage 50 data; the text labelled 'Data

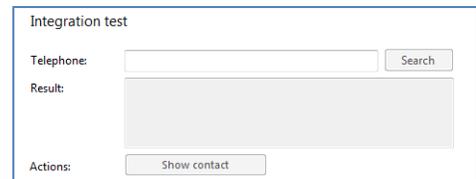
Directory' is what you need to make a note of and enter into the 'Data path' textbox on the 'Configuration' group.

In the 'Driver version' dropdown box, select the 'Sage Line 50' driver with the highest 'v' number.

If the database is password protected, enter the username and password to use to open the database.

Testing

To test if the configuration worked, enter a phone number from your Sage 50 account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.



Integration test

Telephone: Search

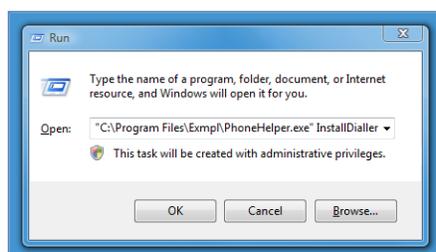
Result:

Actions: Show contact

If the test does not work, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.

Dialing configuration

Sage 50 Accounts lets the computer's operating system deal with the technical bit of the dialing process. To tell the operating system to use our software to do the dialing, you need to run the PhoneHelper.exe program (located in the main program file directory) with the parameter 'InstallDialer'.

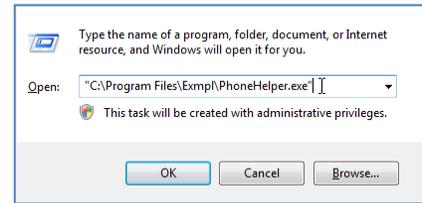


Sounds complicated doesn't it. It's not too bad really but you need to know the 'main program file directory' a.k.a. the filepath to where our software has been installed - your system administrator should know this if you don't, it will be something like 'C:\Program Files\Example'. Press the Windows key and R together to open the 'Run' dialog box. Enter the following text (substituting {main program file directory} with your filepath) into

the 'Open' textbox and then click 'OK':

"{main program file directory}\PhoneHelper.exe" InstallDialer

Alternatively, you can also use the 'Browse...' button to navigate to your main program file directory and select the PhoneHelper.exe program. Once you have selected it, click just to the right of the second " so you can type text manually and add the ' InstallDialer' text at the end - don't miss out the space before the 'I'.



Whichever way you tell it, the operating system will now use our software as the default dialer application when Sage 50 Accounts asks it to make a call.

To dial from within Sage Accounts 50, click the icon that is placed at the end of textboxes that contain telephone numbers.



You can also select a contact from the list view and then click the 'Phone' button near the top of the screen to dial the telephone number stored within the contact record.