Sage 50 Accounting—U.S. Edition Installation Instructions

Sage

Contents

Sage 50 Installation Instructions

Before you begin

During the installation of Sage 50 Accounting, you'll be asked for your serial number. You can find it on your install disc case or in an email that was sent to you from Sage.

Review the Sage 50 System Requirements to ensure that Sage 50 is compatible with your system.

A note about upgrading

If you are upgrading from an earlier release of Sage 50, you can choose to:

Install the new release over the old release.
If you choose to install over the previous version, your company data will NOT be overwritten. When you open the company for the first time with the new release, the Conversion Wizard will automatically update the data files to work with the latest release.

or

Install to a new location on the computer.
You will keep your previous version of Sage 50. If you choose to keep the older version, but convert your company data to the newest release, you will NOT be able to access that data with the old release.

Single-user or Network?
Which installation is right for me?

Network

More than one computer will be networked, and multiple users can access Sage 50 company data at once. See Network installation instructions

Single or stand-alone computer

Sage 50 is installed on only one computer, Sage 50 company data resides on that computer, and the data is accessed only from that one computer.

Installing Sage 50 on a single/stand-alone computer

Follow these instructions if you're installing Sage 50 on only one computer and the Sage 50 company data will reside on that same computer and be accessed only from that one computer.

1. **Disc installation** If you have a Sage 50 installation disc, insert it in the disc drive.

    On Windows 10 or 11, you can type *D:* in the search box (substitute the appropriate drive letter for your disc drive), and then click **Enter**. Browse the disc and double-click Setup.exe.

    Download and install If you downloaded Sage 50, double-click the Sage 50 EXE file. This file is downloaded to your computer's Desktop by default.

2. Select **Install Sage 50 Accounting**.

    Note: We recommend that you turn off your anti-virus software now during the installation of Sage 50. You can turn it back on after the installation is complete.

3. Read and accept the **License Agreement**.

4. In Firewall Settings, we recommend you select Autoconfigure the Windows Firewall to allow install and run Sage 50; however, you can manually configure your firewall.

    Important! If you receive any warnings from your firewall software during the installation, select **Allow** or **Unblock** to continue with the installation.

5. Enter the serial number. The serial number can be found on your installation disc case or in an email that was sent to you.

6. In Single Computer or Network, select **Yes**, this will be the ONLY computer running Sage 50. This will ensure that you install correctly for single user setup.

7. In **Install Options**, specify where you want to put the **Sage 50 program files**. Enter the appropriate path here or leave it set to the default. The path MUST point to a local drive.

8. You can accept the default location for your **Sage 50 company data files** or you can click Browse and select a different location.

   Note: If your computer does not meet the minimum system requirements, you will receive a notification of this at this point.

9. **Installation Completed**   Select to start Sage 50 Accounting and read the what's new, then click **Finish** to complete the installation.

Important: You may be prompted to restart your computer after installing Sage 50. Save your work and close any open programs before restarting.

Installing Sage 50 on a network

Follow these instructions if more than one computer will be networked so that multiple users may access your Sage 50 company data at once.

Important: You must first install Sage 50 on the server computer. Then, install Sage 50 on *each workstation*. Sage 50 workstations connect to the server and access transactions and records stored in the Company Data files.

Quick Tip for Network Installation

After you install Sage 50 on the server, you'll get instructions for installing on the workstations. You can use a link on these instructions to easily install on your workstations. You can also install on multiple workstations at the same time.

Note: Sage 50 Pro Accounting is **not** multi-user compatible and can only be installed on a single computer.

Frequently Asked Questions

Q: Can I place my company data on an external drive connected to the server as another part of the system?

A: No. If the external drive is set up as a mapped location to the server (even though it is physically attached to the server), you cannot install Sage 50.

Q: Can I just install Sage 50 on the server following the defaults and then copy the files to the location I want and edit the .INI file?

A: This is not recommended because Sage 50 sets registry entries on the local computer when it installs. Sage 50 will not function properly if these registry entries are not set.

Installing on the server computer

1. **Disc installation**   If you have a Sage 50 installation disc, insert it in the disc drive.

    On Windows 10 or 11, you can type *D:* in the search box (substitute the appropriate drive letter for your disc drive), and then click **Enter**. Browse the disc and double-click Setup.exe.

    Download and install   If you downloaded Sage 50, double-click the Sage 50 EXE file. This file is downloaded to your computer's Desktop by default.

2. Select **Install Sage 50 Accounting**.

    Note: We recommend that you turn off your anti-virus software now during the installation of Sage 50. You can turn it back on after the installation is complete.

3. Read and accept the **License Agreement**.

4. In Firewall Settings, we recommend you select Autoconfigure the Windows Firewall to allow install and run Sage 50; however, you can manually configure your firewall.

Important! If you receive any warnings from your firewall software during the installation, select **Allow** or **Unblock** to continue with the installation.

5. Enter the serial number. The serial number can be found on your installation disc case or in an email that was sent to you.

6. In Single Computer or Network, select **No**. Sage 50 company data will be shared on a network and accessed by multiple users. This will ensure that you install correctly for multi-user setup.

7. In Sage 50 Company Data Files Storage, select **This computer is the server**.

8. In **Install Options**, specify where you want to put the Sage 50 program and company data files.

   Note: If your computer does not meet the minimum system requirements, you will receive a notification of this at this point.

   Sage 50 program files We recommend that you accept the default location for your Sage 50 program files. You can click Browse and select a different location, if necessary.

   Sage 50 company data files   We recommend that you accept the default location for your Sage 50 company data files. You can click Browse and select a different location, if necessary.

   Important! Company data files must be stored in a shared folder on the server. When you install Sage 50 on your workstations, you'll connect to this shared company data location. After installing, you can [share company data](#).

9. Click **Install** to install Sage 50. This may take a few moments.

Sharing Company Data

Share your company data folder (if it's not already shared). By default, this folder is named "Peachtree".

1. Click **Share the folder** to open Windows Explorer with the folder highlighted.

2. Right-click the folder and select **Properties.**

3. On the Sharing tab, select **Share this folder**. You may need to select **Advanced Sharing** to get the **Share this folder** option, depending on your version of Windows®.

4. Note the **Share Name**. You'll map to the share when installing on your workstations.

5. In **Sharing Company Data**, click **View important information you will need when installing Sage 50 on workstations**. Follow the instructions for installing on workstations and for connecting workstations to the server after you've finished installing on the server.

6. Click **Next** to install. When the installation is complete, the **Installation Completed** window appears. We recommend you activate now if you haven't already done so. Read the Release Notes for brief information about new features in this release. Click **Finish** to complete the installation. Important information about installing on your workstations will appear after you click **Finish**.

Installing on workstations using the Network Installation Manager

At the end of the installation on the server computer, you'll get instructions for installing on your workstations. These instructions are saved on the server in a file on the desktop called Sage 50-Network Installation Manager Instructions.htm.

Important: The network installation manager will NOT work over wireless networks.

Tips

- You can use the network installation manager to install on multiple computers at the same time. Get the installation started on one workstation and then move on to the next one.

- If you have any problems using the network installation manager, you can still install Sage 50 on each workstation using the installation disc or downloaded files.

1. You need to get these instructions to each computer where you are going to install Sage 50 by doing one of the following:

    - Email the file to an account you can access from the other computers.

    - Save the file to a USB drive and take it to each computer.

    - Print the instructions and take them to each computer.

2. On each computer, open the file and click the link shown in Step 2. This will start the installation on that computer. If the link doesn't work or if you printed the instructions, you can copy/paste or type the link location in Search>Run or in Windows Explorer.

3. In Sage 50 Company Data Files Storage, select **A different computer on the network is the server and will store Sage 50 company data**. Confirm that **Sage 50 has already been installed on the server**.

4. When the installation begins, verify the information on the Client Install screen. The default information on this screen should be correct, but you can change it, if it's not.

5. Click **Install**.

6. When the installation is complete, the Installation Completed window appears. Select or clear the options as wanted. Then, select **Finish** to complete the installation.

Installing on workstations using the Installation Disc or downloaded files

Follow these steps if you need to install Sage 50 on each workstation using the installation disc or downloaded files. Make sure you know the drive and directory of the Sage 50 company data files located on the server computer before you begin installation.

Note: It is easier to install Sage 50 on your workstations using the network installation manager. Using the install disc or downloaded files to install on your workstations is only recommended if you cannot install using the network installation manager.

1. Browse to your computer's Desktop and double-click the Sage 50 EXE file. This file is downloaded to your computer's Desktop by default.

   Note: You can get the downloaded file onto each workstation several different ways.

   • Download the file to each computer.

   • Burn the downloaded file onto a disc.

   • Copy put it on a USB drive to take the file to each computer.

   • Place the downloaded file out on the network where it can be accessed from each computer. Then copy the downloaded file to each computer.

2. Select **Install Sage 50 Accounting**.

   Note: We recommend that you turn off your anti-virus software now during the installation of Sage 50. You can turn it back on after the installation is complete.

3. Read and accept the **License Agreement**.

4. In Firewall Settings, we recommend you select Autoconfigure the Windows Firewall to allow install and run Sage 50; however, you can manually configure your firewall.

   Important! If you receive any warnings from your firewall software during the installation, select **Allow** or **Unblock** to continue with the installation.

5. Enter the serial number. The serial number can be found on your installation disc case or in an email that was sent to you.

6. In Single Computer or Network, select **No. Sage 50 company data will be shared on a network and accessed by multiple users.** This will ensure Sage 50 knows you are installing in a network environment.

7. In Sage 50 Company Data Files Storage, select **A different computer on the network is the server and will store Sage 50 company data**. Confirm that **Sage 50 has already been installed on the server**.

8. In **Install Options**, specify where you want to put the Sage 50 program files. The path MUST point to a local drive.

9. Select the network location where the Sage 50 company data is stored. Click the drop-down arrow to display a list of shared folders on your network. You should see the folder that you shared when Sage 50 was installed on the server. By default, this folder is named "Peachtree". Click on it to select it.

If "Peachtree" is not in this list, click **Find a computer** and search for it manually. See the last section of this document for [instructions on mapping a drive from this screen](#).

10. Click **Install** to install Sage 50. This may take a few moments.

11. Read the Release Notes for brief information about new features in this release. Click **Finish** to complete the installation.

12. Repeat these instructions for each workstation.

Mapping a Drive to the Server Computer

If you cannot find the correct shared folder for your Sage 50 company data files, it is most likely because your workstation is not mapped to the server computer that stores the Sage 50 company data files. Below are general steps for mapping a drive.

1. To map the drive where the Sage 50 company data files are stored, click **Find a Computer** on the Company Data Files Location workstation installation screen. This will open the Microsoft Windows Map Network Drive window. (You can also open this window directly from Windows Explorer.)

2. Select the drive and folder on the server that you shared when you installed Sage 50's company data files.

3. Make sure that **Reconnect at logon** is selected! If it is not selected, you will lose your connection to the data files whenever you log out of this computer.

4. Click **Finish**.