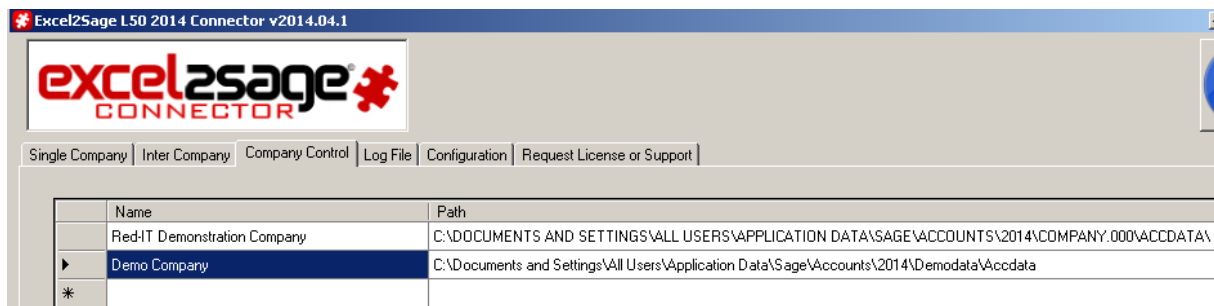## UPGRADING EXCEL2SAGE TO LATEST VERSION

Take a backup copy of your existing version of Excel2Sage, including the Spreadsheet for import.

Keep a copy of your company configuration screen of Excel2Sage (see example below)

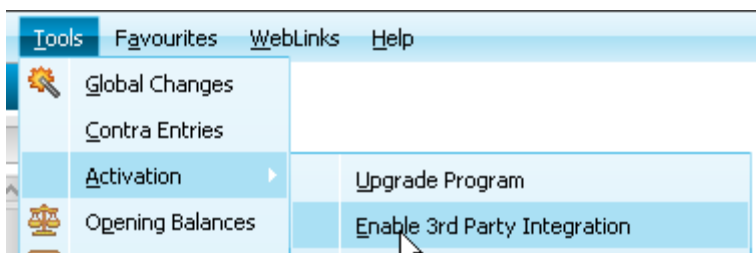Keep a note of your licence key (held in the configuration tab) eg:

D07B8370C4CC8D10532F60309750000006400003000021D55BD14D3

UNINSTALL your existing version of Excel2Sage as the updated version has significant changes.

Download, unzip and run the Setup for Excel2Sage using the wizard (installation guide also provided with the download).
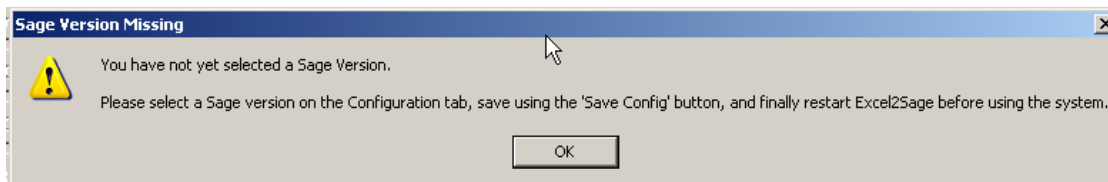
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In Sage: Ensure 3rd Party Integration has been enabled (also known as SDO) Go to Help > About. If the SDO has been registered, the value for SDO will be Yes in the Features Enabled section.

If SDO is not enabled, you will require an activation code from Sage – and is accessed from **Tools / Activation / Enable 3rd Party Integration.**

In Sage: Check the E2S user is setup via **Settings / Access Rights.** We suggest user 'connector' and password 'p@ssw0rd' but this can be anything you like. Ensure the Excel2Sage user and password match via the Configuration tab. You need to set up this user for any Sage company you wish to use.

In Excel2Sage: Select Sage Version

Select the correct Sage version in the Configuration tab.

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In Excel2Sage: Paste your full licence key in the configuration tab and Save Config.

Close the E2S connector

Re-open E2S connector and Reset Company Information:

In Excel2Sage: Read Sage Companies and select default company

Please ensure you are not connected to Sage when you use the buttons on this screen.

If Sage runs on a network, you may need to check in Sage for the path.

Go to **Help / About / System Information / Directories** and right-click the Data Directory item and choose Open Folder and then copy the location into the Sage Install Folder field in the Configuration tab.

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Check the new E2S spreadsheet for additional fields available for your imports.

Note:

If you use your old spreadsheet, you may get error messages (see example below)

Net Error: Circular reference caused by alias 'OrderDueDate' in query definition's SELECT list.

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