

Solving: Sage 50, Remote Data Access Error

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PURPOSE

The purpose of this guide is to walk you through the steps to resolve a Remote Data Access error. This guide assumes that you have already attempted looking for records stored on a separate Virtual Terminal.

This is detailed in KB Article:

<https://support.sagepayments.com/ics/support/KBAnswer.asp?questionID=1832>

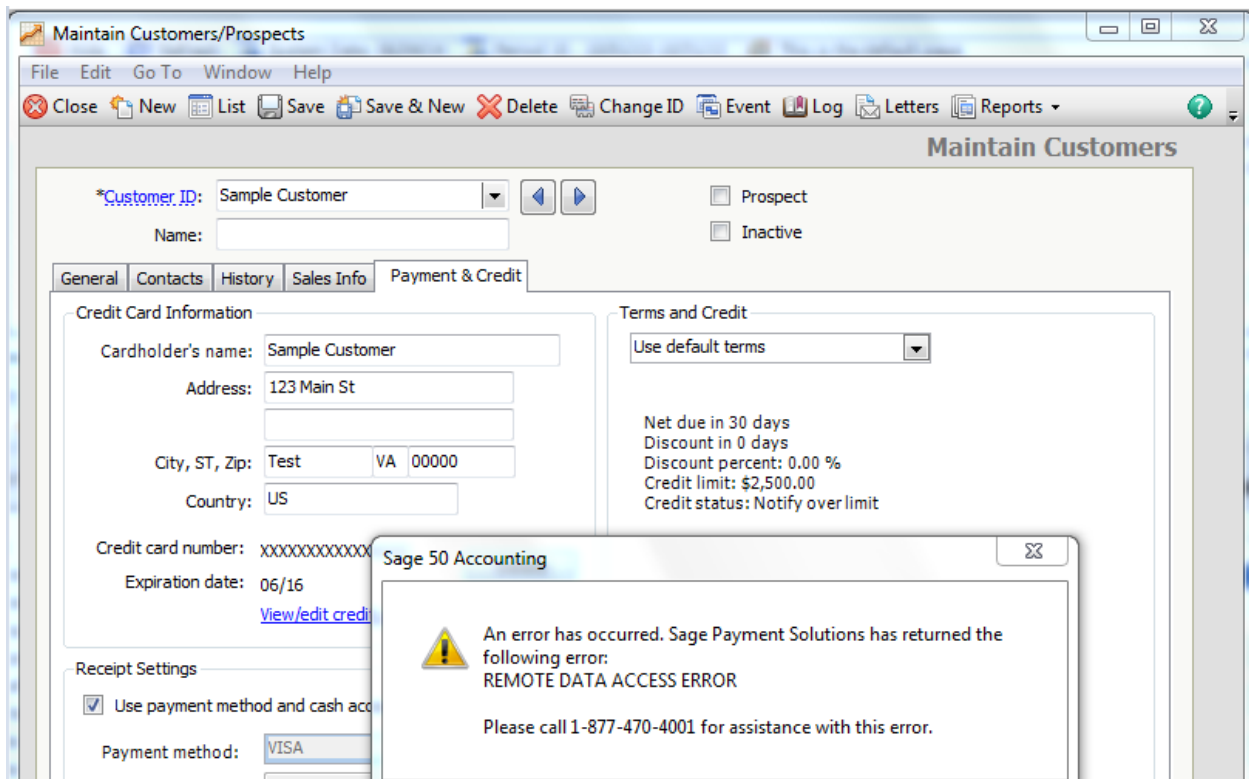
LIMITATIONS

This guide will result in the merchant needing to save a new card number for their customer. This method will not allow for the retrieval of the saved card number.

REQUIREMENTS

1. Microsoft Excel, Notepad can be used if Excel is not available
2. Sage 50 administrator access

SYMPTOM EXAMPLE



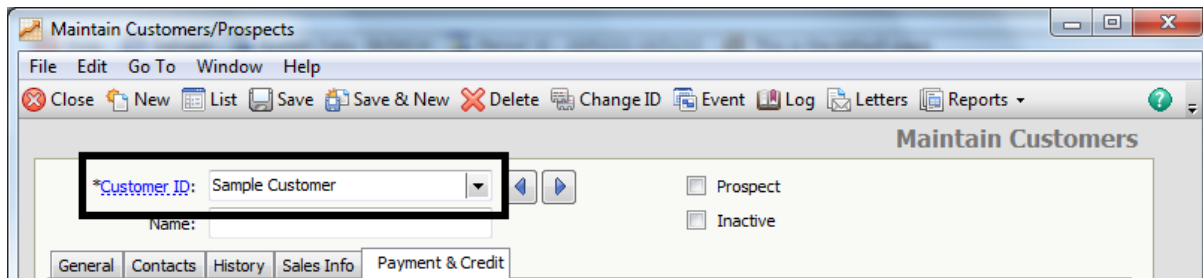
HOW TO GUIDE

BE SURE TO BACK UP THE COMPANY FILE BEFORE CONTINUING. THIS IS NOT OPTIONAL!!!

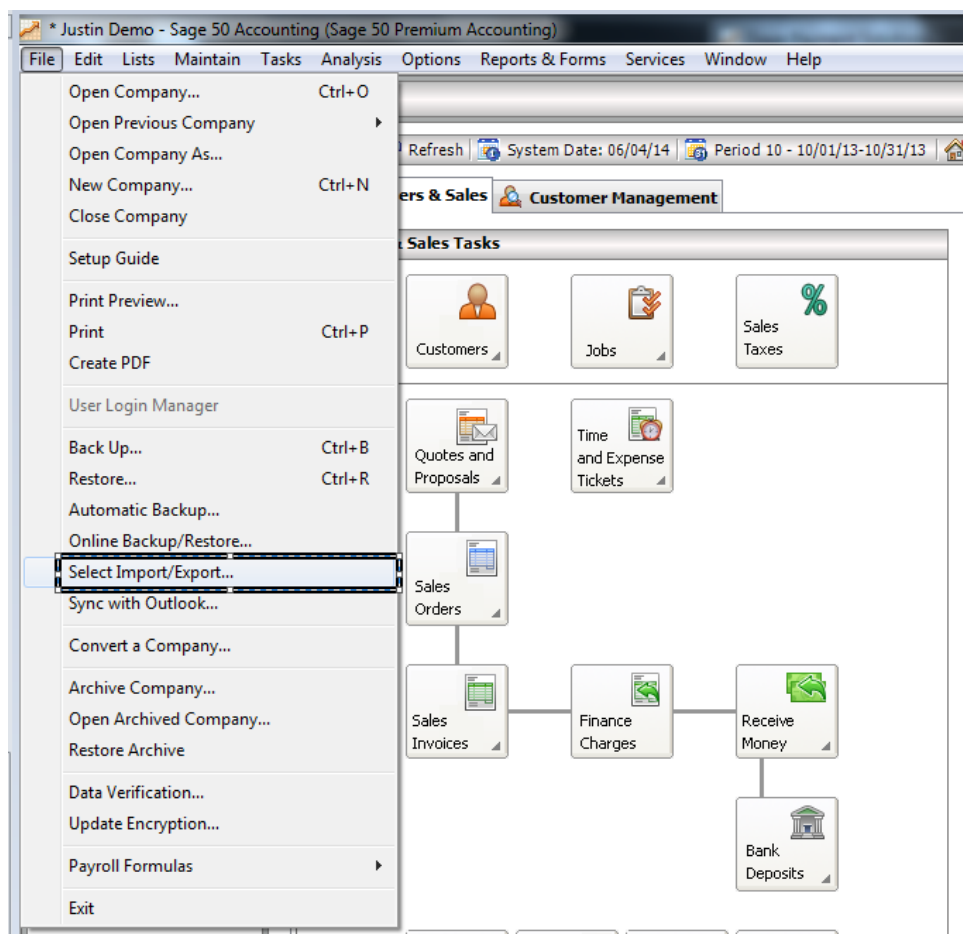
INSTRUCTIONS:

[HTTPS://SUPPORT.NA.SAGE.COM/SELFSERVICE/VIEWCONTENT.DO?EXTERNALID=10390&SLICEID=1](https://support.na.sage.com/selfservice/viewcontent.do?externalid=10390&sliceid=1)

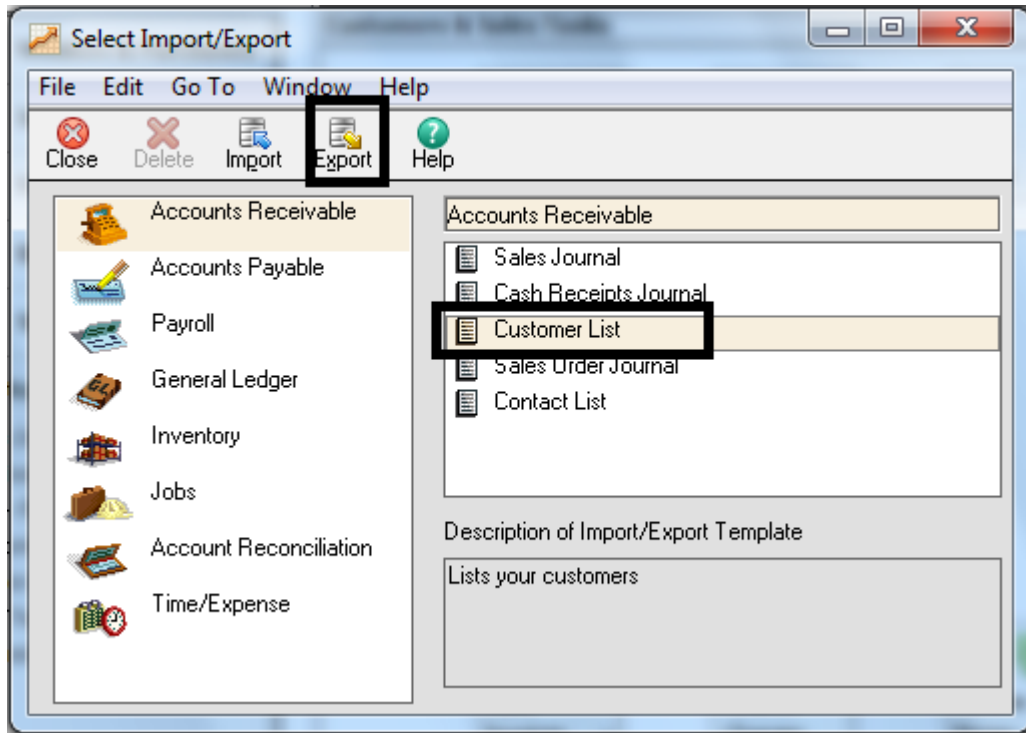
STEP 1: ON THE CUSTOMER MAINTENANCE SCREEN RECORD THE “CUSTOMER ID” FOR ANY CUSTOMER RECEIVING THE “REMOTE DATA ACCESS ERROR”.



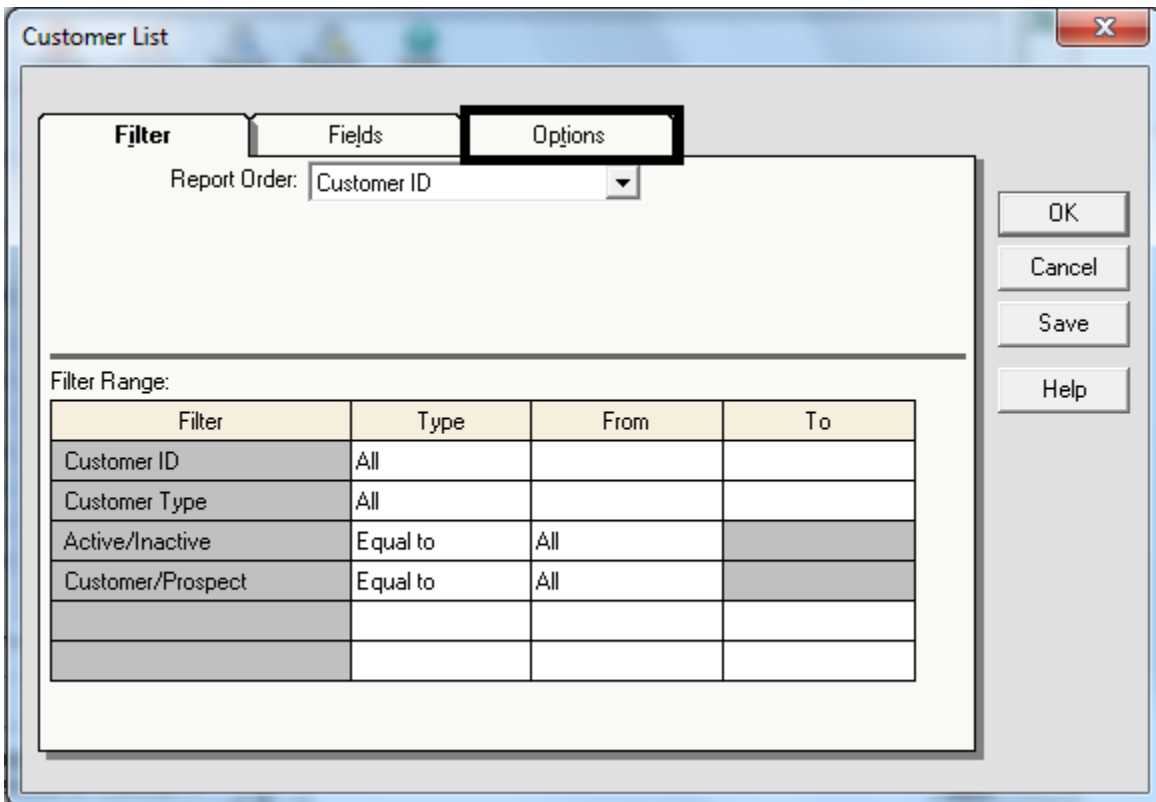
STEP 2: ON THE MAIN FILE MENU SELECT THE “SELECT IMPORT/EXPORT...” OPTION



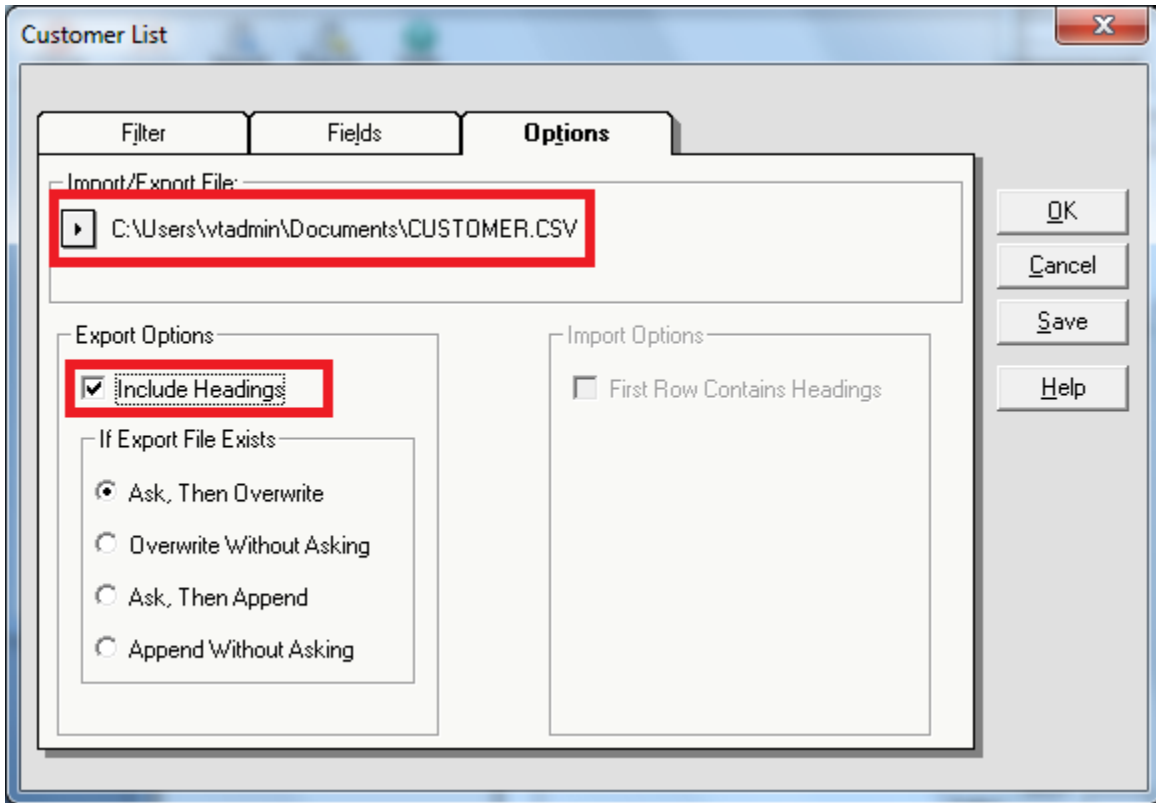
STEP 3: SELECT "CUSTOMER LIST" AND PRESS THE EXPORT BUTTON



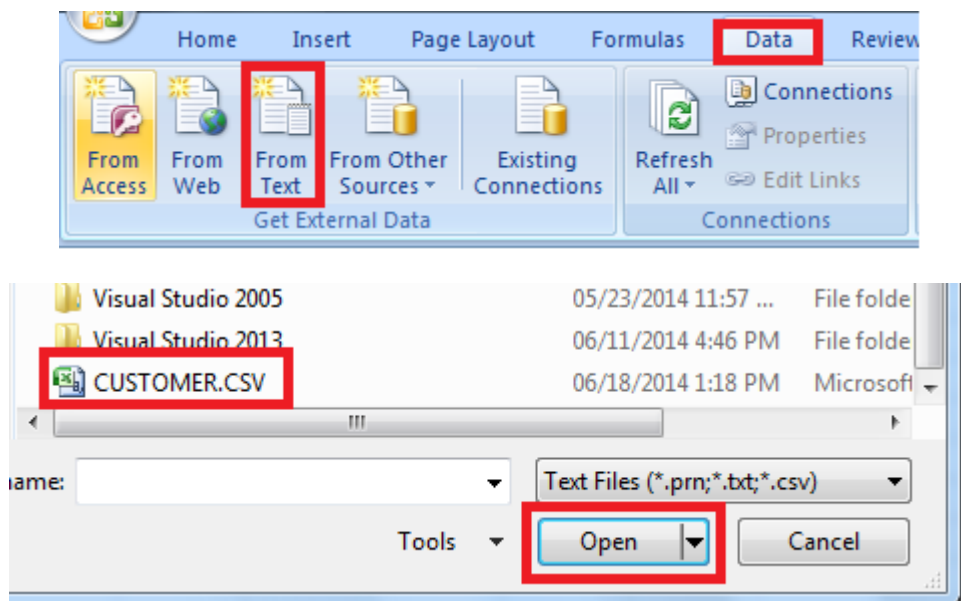
STEP 4: ON THE "CUSTOMER LIST" SCREEN CHOOSE THE "OPTIONS" TAB



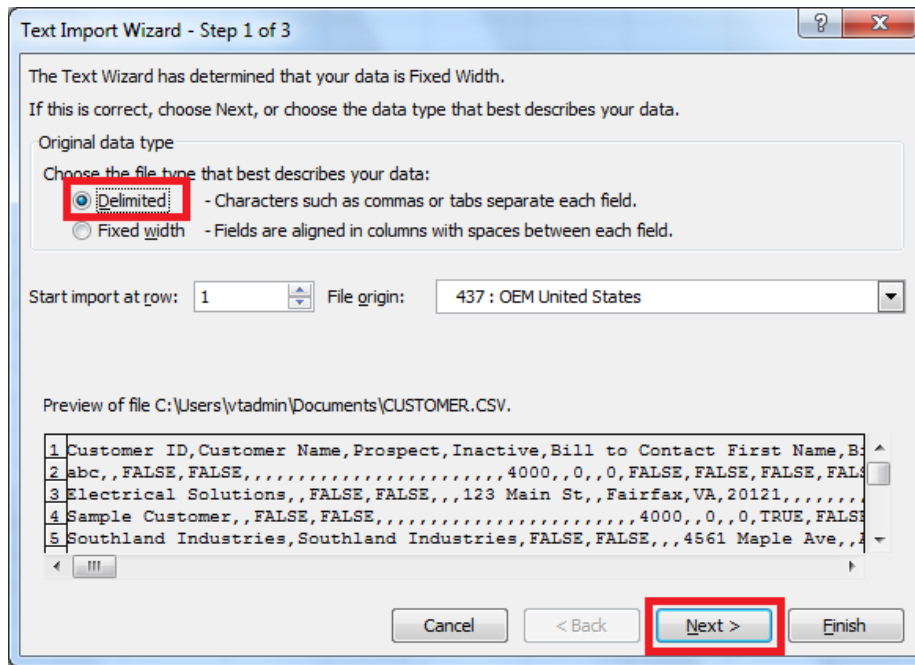
STEP 5: NOTE THE “**DIRECTORY**” WHERE THE EXPORT IS SENT AND CLICK CHECK THE BOX FOR “**INCLUDE HEADINGS**”. THEN PRESS “**OK**”.



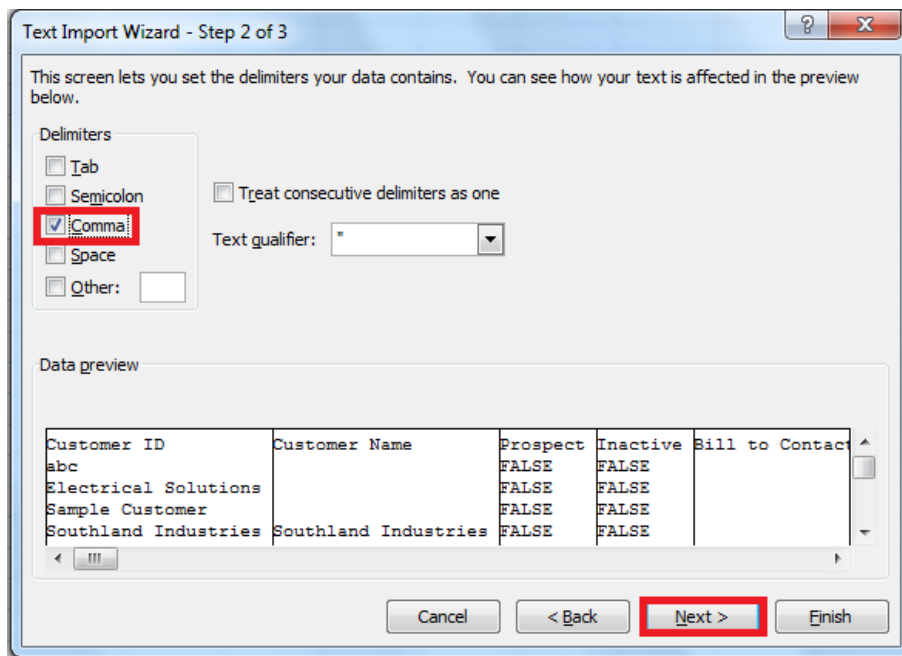
STEP 6: OPEN EXCEL AND CREATE A NEW WORKBOOK. **DO NOT** OPEN THE CUSTOMER.CSV FILE BY DOUBLE CLICK THE FILE OR USING “OPEN” IN EXCEL. CHOOSE THE “DATA” MENU OPTION AND CLICK THE “FROM TEXT” BUTTON. NAVIGATE TO THE CUSTOMER.CSV FILE AND SELECT “OPEN”



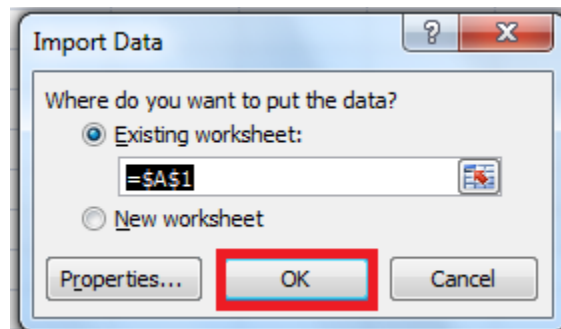
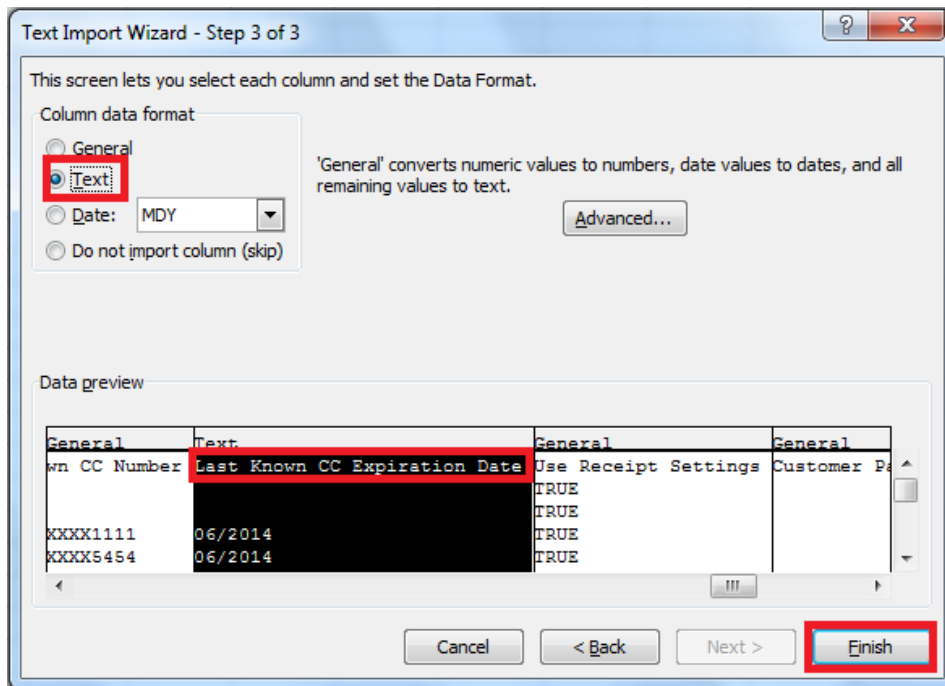
STEP 7: ON THE “TEXT IMPORT WIZARD – STEP 1 OF 3” SCREEN CHOOSE “DELIMITED” AND CLICK “NEXT”.



STEP 8: ON THE “TEXT IMPORT WIZARD – STEP 2 OF 3” CHECK THE BOX FOR “COMMA” MAKING SURE ALL OTHER BOXES ARE UNCHECKED. THEN CLICK NEXT.



STEP 9: ON THE “TEXT IMPORT WIZARD – STEP 2 OF 3” UNDER DATA PREVIEW LOCATE THE COLUMN WITH HEADER “LAST KNOWN CC EXPIRATION DATE” AND CHOOSE “TEXT” UNDER THE COLUMN DATA FORMAT. CLICK “FINISH” WHEN DONE. IF YOU RECEIVE THE “IMPORT DATA” SCREEN JUST CLICK “OK”.



STEP 10: ROW 1 WILL CONTAIN THE HEADERS FOR EACH OF THE COLUMNS. YOU WILL WANT TO LOCATE THE COLUMN TITLED “CUSTOMER ID”, THIS WILL MOST LIKELY BE “COLUMN A”. YOU WILL WANT TO LOCATE THE ROW WITH THE “CUSTOMER ID” FROM STEP 1

	A	B	C	D	E
1	Customer ID	Customer Name	Prospect	Inactive	Bill to Contact First Name
2	abc		FALSE	FALSE	
3	Electrical Solutions		FALSE	FALSE	
4	Sample Customer		FALSE	FALSE	
5	Southland Industries	Southland Industries	FALSE	FALSE	

STEP 11: YOU WILL NOW SCROLL RIGHT UNTIL YOU HAVE THE COLUMNS OF “CREDIT CARD STORED REFERENCE, MERCHANT ID, LAST KNOWN CC NUMBER, AND LAST KNOWN CC EXPIRATION DATE”.

DELETE THE DATA IN THE CUSTOMERS ROW FOR “CREDIT CARD STORE REFERENCE, LAST KNOWN CC NUMBER, AND LAST KNOWN CC EXPIRATION DATE”

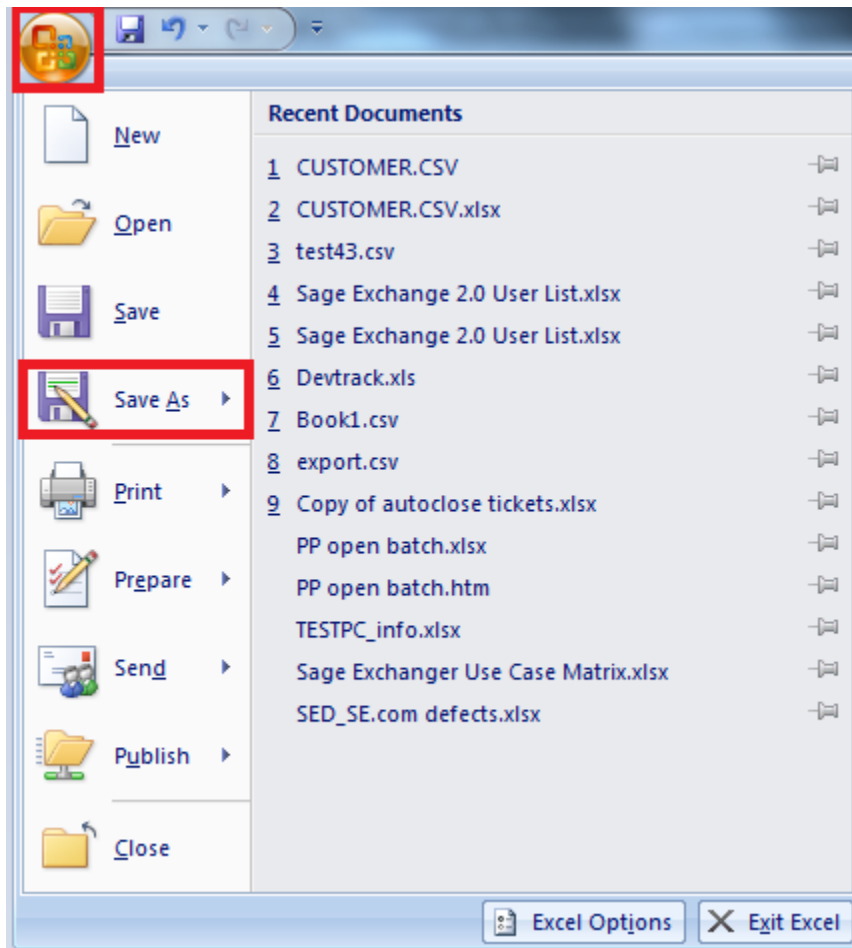
BEFORE:

AY	AZ	BA	BB
Credit Card Stored Reference	Merchant ID	Last Known CC Number	Last Known CC Expiration Date
{00000000-0000-0000-0000-000000000000}	2.52467E+11		
{00000000-0000-0000-0000-000000000000}	2.52467E+11		
{8E85FA7A-9B43-42C7-98F5-357E586B54DA}	2.52467E+11	XXXXXXXXXXXX1111	06/2014
{75468881-319D-421B-B6E2-D2838CA1EBF2}	2.52467E+11	XXXXXXXXXXXX5454	06/2014

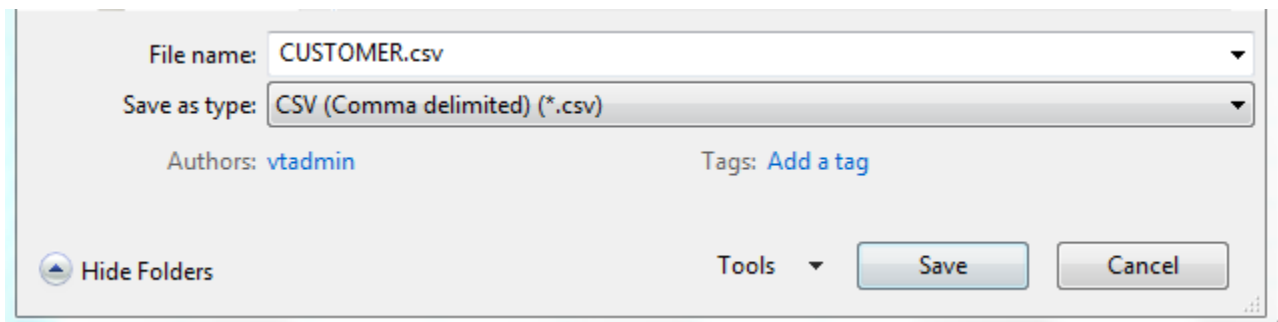
AFTER:

AY	AZ	BA	BB
Credit Card Stored Reference	Merchant ID	Last Known CC Number	Last Known CC Expiration Date
{00000000-0000-0000-0000-000000000000}	2.52E+11		
{00000000-0000-0000-0000-000000000000}	2.52E+11		
	2.52E+11		
{75468881-319D-421B-B6E2-D2838CA1EBF2}	2.52E+11	XXXXXXXXXXXX5454	Jun-14

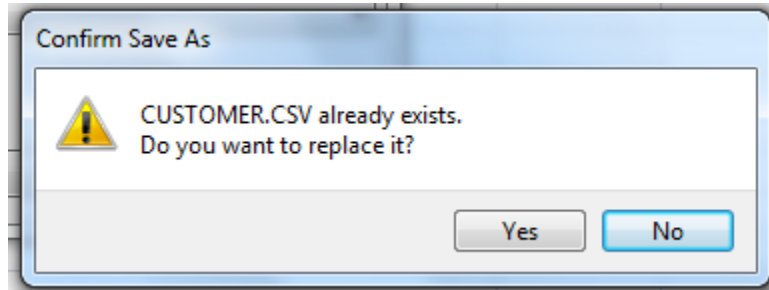
STEP 12 : OPEN THE “MAIN MENU” AND CHOOSE “SAVE AS”



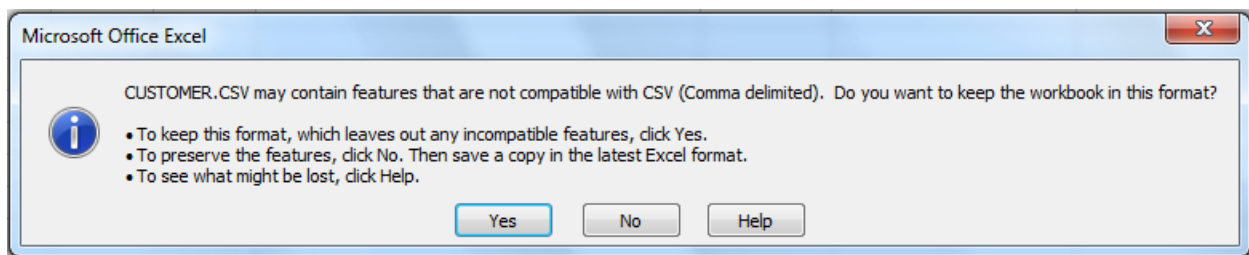
STEP 13: CHANGE THE “SAVE AS TYPE” TO “COMMA DELIMITED (*.CSV)” AND SET THE FILE NAME TO “CUSTOMER.CSV”. CLICK “SAVE”



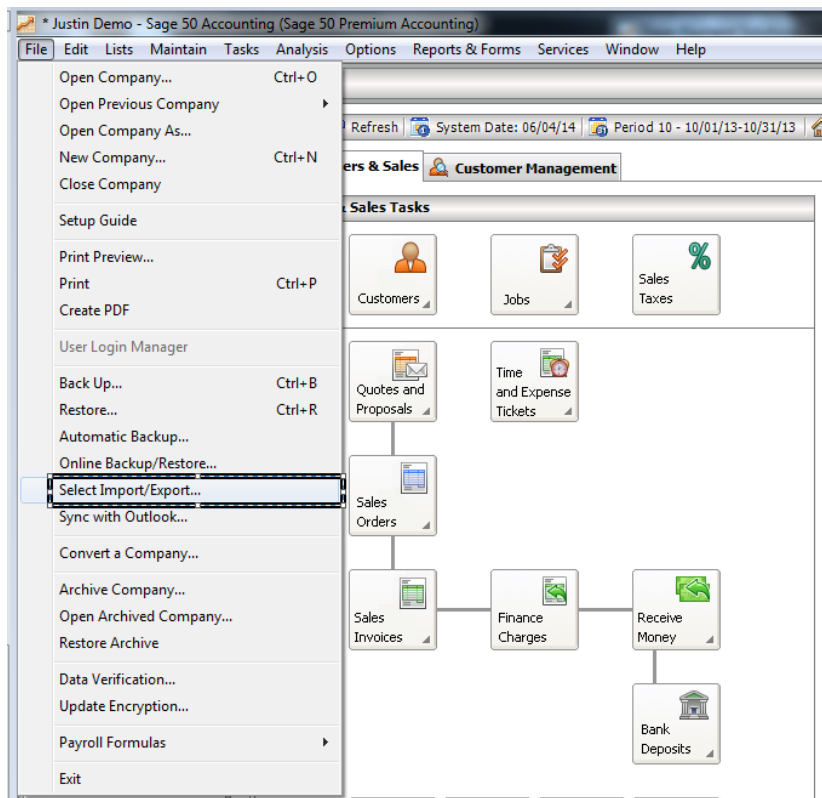
STEP 14: IF DONE RIGHT YOU SHOULD SEE THE “CONFIRM SAVE AS” SCREEN. CLICK OK. IF YOU DO NOT GET THIS SCREEN YOU MAY BE SAVING THE FILE TO A DIFFERENT DIRECTORY OR TYPED THE NAME WRONG.



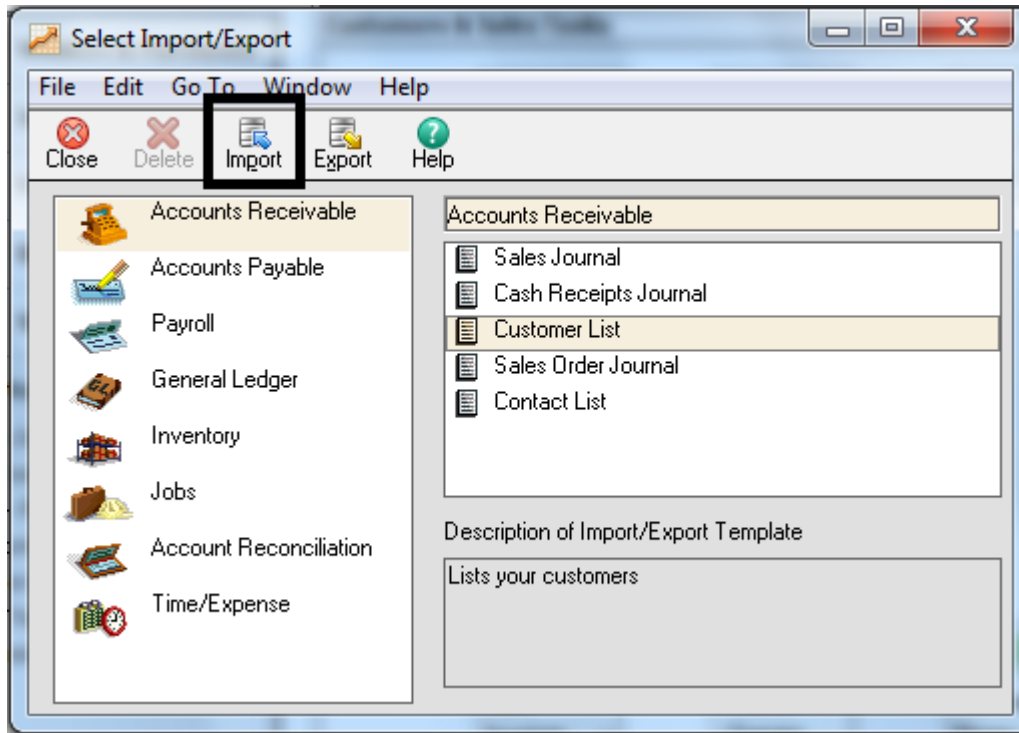
STEP 15: ON THE “MICROSOFT OFFICE EXCEL” POP-UP WINDOWS CLICK “OK”



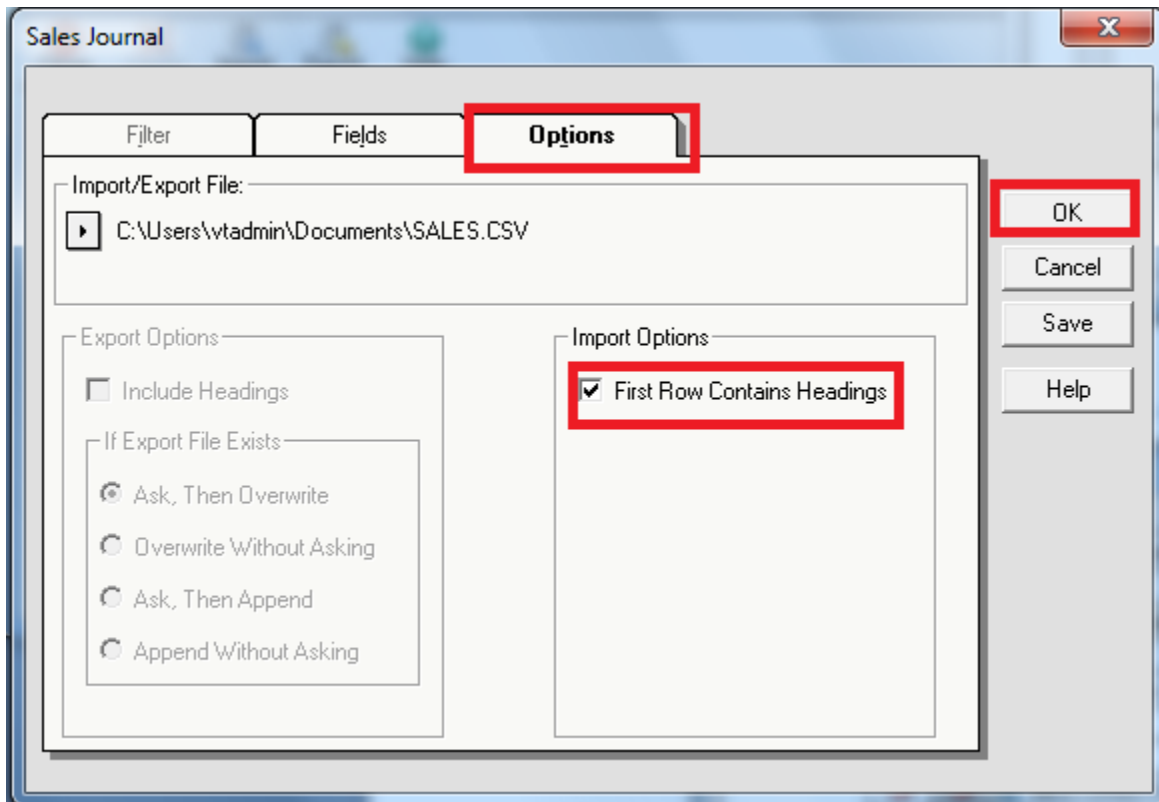
STEP 16: GO BACK TO SAGE 50 AND SELECT THE “SELECT IMPORT/EXPORT...” OPTION



STEP 17: SELECT THE "IMPORT" OPTION



STEP 18: CHOOSE THE "OPTIONS" TAB AND CHECK THE BOX FOR "FIRST ROW CONTAINS HEADINGS". PRESS OK.



STEP : ACCESS THE CUSTOMER IN CUSTOMER MAINTENANCE. YOU SHOULD SEE THAT THE CARD NUMBER AND EXPIRATION DATE ARE NOW GONE. YOU CAN NOW CLICK THE “VIEW/EDIT CREDIT CARD DETAILS” LINK AND SAVE A NEW CARD NUMBER.

The screenshot displays the 'Maintain Customers/Prospects' application window. The title bar reads 'Maintain Customers/Prospects'. The menu bar includes 'File', 'Edit', 'Go To', 'Window', and 'Help'. The toolbar contains icons for 'Close', 'New', 'List', 'Save', 'Save & New', 'Delete', 'Change.ID', 'Event', 'Log', 'Letters', and 'Reports'. The main content area is titled 'Maintain Customers' and features a dropdown menu for '*Customer.ID:' set to 'Sample Customer'. Below this is a 'Name:' field. The 'Payment & Credit' tab is active, showing 'Credit Card Information' and 'Terms and Credit' sections. In the 'Credit Card Information' section, the 'Cardholder's name' is 'Sample Customer' and the 'Address' is '123 Main St'. The 'City, ST, Zip' is 'Test VA 0' and the 'Country' is 'US'. The 'Credit card number' and 'Expiration date' fields are empty, with a 'Delete' button next to them. A link labeled 'View/edit credit card details' is located below these fields. The 'Terms and Credit' section shows 'Use default terms' selected in a dropdown menu. Below this, the following terms are listed: 'Net due in 30 days', 'Discount in 0 days', 'Discount percent: 0.00 %', 'Credit limit: \$2,500.00', and 'Credit status: Notify over limit'. The 'Receipt Settings' section at the bottom has a checked checkbox for 'Use payment method and cash account from last saved receipt.' The 'Payment method' is set to 'VISA' and the 'Cash account' is '1020'.