



ACCESS CHECKLIST FOR PRE-EXISTING INSTANCE OF SAGE CRM

Today's Date: _____

Company Name: _____

REQUIRED INFORMATION

1. High-level summary of the environment:

a. Name and IP of the Production application server that Sage CRM has been installed on:

b. Name and IP of the Production SQL server, if different from Production application server:

2. URL to bring up Sage CRM within the network:

3. URL to bring up Sage CRM from outside the network, if applicable:

4. Sage CRM Application credentials (Admin level):

Username: _____ Password: _____

5. Remote Access: We require remote access to the environment where Sage CRM, SQL (and often the accounting system) have been installed.

a. VPN client type (preferably Cisco, SonicWall, Windows VPN / L2TP/IPsec

b. URL of VPN server if a VPN connection is required:

c. VPN details:

d. VPN Username: _____ VPN Password: _____

e. Your firewall's geo-settings must allow for access from India OR at least the following IP addresses:

- 49.248.14.234
- 114.143.249.38
- 36.255.85.172
- 14.99.133.190
- 106.51.36.30
- 106.51.77.168

f. URL(s) or IP Address(es) of RDP server(s):

g. RDP Username: _____ RDP Password: _____

h. Name of Domain: _____

6. Our Window user must have administrator level rights on the server(s) to allow us to do the following:

- a. Copy and move files
- b. Reset IIS
- c. Install any software
- d. Back up the SQL database
- e. Ability to reboot the server
- f. The credentials we need on the network must allow us to add roles & features on the server using server manager

Note: Sometimes we require the server to be rebooted, make sure there is no USB, or any other device, connected to the server that might affect the boot sequence...

7. Related to MS SQL,

- a. Version of MS SQL being used: _____
- b. MS SQL sa password (or sa equivalent user/pw) : _____
- c. MS SQL Management Studio must be installed on the CRM application server...

Note: The CRM Team does not install MS SQL or apply updates to MS SQL. This is the responsibility of the client's IT Team.

8. List the Windows Server OS Version: _____

9. List the version(s) of Microsoft .Net framework installed on the server allocated to Sage CRM:

10. Set network security settings to enable us to download software from [Sage Partner Portal](#) ...

11. Ensure Chrome and Edge have been installed ...

12. If Sage CRM will not be available via an external URL, please ensure that MS Word, MS Excel, and Adobe Reader are installed on the CRM application server ...

13. Ensure that Notepad ++ is installed on the CRM application server ...

14. List other applications running on IIS, if applicable:



15. Describe current backup protocols:

Responsibilities of the IT Team (not the CRM team)

16. Backing up the System: We will provide you with a PDF document defining the CRM files to be backed up and the frequency. Beyond the external backups that your IT department might take, we will need backups applied to the new MCM drive. The Sage CRM team is not responsible for backing up the Sage CRM system.

NOTE – before applying any upgrades or patches to Sage accounting, please ensure you have taken a copy of the Sage CRM folder and Sage CRM database.

17. IT will need to take responsibility for configuring Sage CRM to send outbound emails. We will send you a separate email. I understand...

18. IIS and External URL. If the client has or wants an external URL for Sage CRM, it is the responsibility of the IT team to acquire, apply, and manage the SSL Certificate.

19. Do not install Java updates on the server. Sage CRM manages its own Java Runtime shipped by Sage Installer and if disrupted, various components will fail (i.e. Dashboards, Reports, Exports, Tomcat, etc.). CRM only works with certain, already tested, versions of Java. PLEASE DO NOT INSTALL ANY NEW VERSIONS OF JAVA. I understand...

20. When installing new Sage CRM related software on the CRM server, sometimes a server restart is required. May we reboot the CRM server before 7am local time? Yes No

CONTACT INFORMATION

IT Contact: _____

Email Address: _____ Phone: _____

ADDITIONAL INFO/COMMENTS

Please email completed form to your Sage CRM Project Manager