

## PRE-INSTALLATION CHECKLIST FOR GUMU™ Salesforce Integration to Sage 100

Today's Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

**\*Note: there are 3 sections within this checklist, which may require info from 3 different contacts.**

### Section 1 – REQUIRED INFORMATION FROM YOUR SALESFORCE ADMINISTRATOR

Ultimately, we will need user access to your Salesforce instance. However, in advance of creating a Salesforce user for us to use when configuring the integration, please be aware of the following points:

- You may use the username "gumu@greytrix.com" with email address "salesforce@greytrix.com" for creating the Salesforce user in Salesforce OR you can provide us with one for an existing user, so long as this user has full Admin and Developer rights.
- This user will always be used for the integration. The user you provide doesn't need to be a dedicated user for the integration, however the user does require "Admin" level privileges for installing the GUMU™ connector from the Salesforce App Exchange.
- This integration does not consume a Salesforce user license.
- In a typical setup, we map Sage 100 Salesperson codes to Salesforce users. In the absence of a corresponding Salesforce user to a Sage 100 Salesperson code, the value that will display in Salesforce will be this Salesforce user that was created for the integration.

#### 1) Salesforce Access Credentials:

- a) Please create the username [gumu.#comp\\_name#@greytrix.com](#) where #comp\_name# = your company name. Production username: \_\_\_\_\_
- b) Production password: \_\_\_\_\_

When we install the integration, we will first do this on a Salesforce sandbox instance. If you have created a sandbox for us already, please provide answers below, but if you have not yet done this and you want us to do this -we can.

#### 2) Salesforce Sandbox Credentials:

- a. Sandbox username: \_\_\_\_\_
- b. Sandbox password: \_\_\_\_\_
- c. Sandbox Security Token: \_\_\_\_\_
- d. No Sandbox, please create

- 3) Disabling MFA for the Greytrix team: To avoid the generation of verification code every time Greytrix logs in, please configure our IP to your Salesforce account by following these steps:
- Login to Production/Sandbox Salesforce Org.
  - Go to Setup → Administration Setup → Security Controls → Network Access.
  - Click on the 'New' button.
  - Enter our IP address (**49.248.14.234**) in both the 'Start' and 'End' IP address fields.
  - Save the record.

\*Here is a [60-second video covering the steps above](#). Please confirm #3 has been completed

- 4) Customer Salesforce Contact: \_\_\_\_\_  
Email Address: \_\_\_\_\_ Phone: \_\_\_\_\_

## Section 2 - REQUIRED INFORMATION FROM IT TEAM

- 1) We require remote access with Admin rights to the Sage 100 server that Sage 100 has been installed on. This can be via remote access, VPN, Team Viewer, Or LogMeIn. Please identify the access provided (credentials) in the box below.
- \_\_\_\_\_
- 2) Sage 100 Windows server name: \_\_\_\_\_
- 3) IIS must be installed on this server. Has IIS been installed?
- 4) The IT team needs to have an internet domain (or sub-domain) name that will point to the specific port (443) on IIS for constructing the SData URL for external access. Below is an example where the highlighted sections reflect your domain (or sub-domain) and one of the Sage 100 databases.
- Example: [https://<<Domainname>>/SData/MasApp/MasContract/SAMLTD/AR\\_Customers](https://<<Domainname>>/SData/MasApp/MasContract/SAMLTD/AR_Customers)

\*We will be installing the integration component (module name is GUMU) within the Sage 100 server. This external URL should be provided using a valid SSL Certificate acquired from a registered Certificate Authority (CA) i.e., Verisign, GoDaddy, etc. Salesforce supports only secured external URLs provided/verified by public CA. Please define your URL below:

\_\_\_\_\_

- 5) Configure SQL

\*This is not required if you do not use the Premium version (SQL version) of Sage 100. N/A

Create a SQL user with the same name as Sage 100 user

Bind the SQL user to the required MAS\_XXX company databases

Assign the SQL user DB\_Reader rights (and DB Writer to write data to Sage 100 Premium) to the company databases

Example SQL script (assumes the MAS\_XXX database is selected):

```
EXEC sp_addrolemember N'db_datareader', N'SdataUser'
```

- 6) Sdata adapter to be installed on the Sage 100 server. Has SData Adapter been installed?
- 7) In the network firewall, we require you to whitelist:
  - a. Salesforce IPs server so that the URL is accessible in Salesforce. You can refer to this link for your reference [Salesforce IP Addresses and Domains to Allow](#)
  - b. Greytrix's IP 49.248.14.234                      Please confirm #7 has been completed
- 8) IT Contact: \_\_\_\_\_  
Email Address: \_\_\_\_\_ Phone: \_\_\_\_\_

**Section 3 - REQUIRED INFORMATION FROM SAGE 100 PARTNER**

- 1. Sage 100 version number: \_\_\_\_\_ Product update date: \_\_\_\_\_
- 2. Sage 100 Edition: Standard                      Advanced                      Premium
- 3. Sage 100 Home Directory Path:  
\_\_\_\_\_
- 4. Sage 100 Application login credentials (**with admin rights**) to be used for the integration:  
Username: \_\_\_\_\_ Password: \_\_\_\_\_
- 5. Sage 100 Company Code names to integrate with Salesforce:  
\_\_\_\_\_
- 6. Sage 100 TEST Company Code names to integrate with Salesforce Sandbox (if applicable):  
\_\_\_\_\_
- 7. SData adapter must be installed on the Sage 100 server. Has this been installed?
- 8. Sage 100 Contact: \_\_\_\_\_  
Email Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Please email completed form to your My CRM Manager Project Manager