PRE-INSTALLATION CHECKLIST FOR
GUMU™ Salesforce Integration to Sage 300

Today's Date: _____

Company Name: _____

Note that there are <u>3 sections</u> within this checklist, which may require information 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 of 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 300 Salesperson codes to Salesforce users. In the absence of a corresponding Salesforce user to a Sage 300 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) 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: _____

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:
   a. Login to Production/Sandbox Salesforce Org.
   b. Go to Setup →Administration Setup → Security Controls → Network Access.

    c.   Click on the 'New' button.

    d.   Enter our IP address **(49.248.14.234)** in both the 'Start' and 'End' IP address fields.

    e.   Save the record.

*Here is a <u>60-second video covering the steps above</u>. Please confirm #3 has been completed:

4)   Customer Salesforce Contact: _____

      Email Address: _____ Phone: _____

Section 2 - REQUIRED INFORMATION FROM IT TEAM

We require remote access with Admin rights to the Sage 300 server that Sage 300 has been installed on (must be the server and not just a Sage 300 workstation). This can be via remote access, VPN, Team Viewer, Or LogMeIn.

We will be installing the integration component within IIS on the Sage 300 server. After we have done this, the IT team must provide a domain name mapped externally for the integration. This usually requires a valid SSL Certificate acquired from a third-party developer (GoDaddy or otherwise). The company providing the certificate must be a registered certificate authority.

1)   Please identify the access provided (credentials) in the box below.

      _____

2)   Sage 300 Windows server name: _____

3)   We require the MS SQL sa pw (or sa equivalent): _____

4)   IIS must be installed on this server. Has IIS been installed?

5)   The IT team needs to have an internet domain (or sub-domain) name that will point to the specific port (443) on the system for constructing the below URL, where the highlighted sections reflect your domain and one of the Sage 300 databases.

      Example: https:<mark>//<<Domainname>></mark>/Sage300WebApi/v1.0/-/<mark>SAMLTD</mark>/AR/ARCustomers

6)   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 <u>https://help.salesforce.com/s/articleView?id=000321501%26type=1</u>

    b.   Greytrix's IP 49.248.14.234

7)   IT Contact: _____

      Email Address: _____ Phone: _____

Section 3 - REQUIRED INFORMATION FROM SAGE 300 PARTNER

1) Sage 300 version number: _____

2) Sage 300 Home Directory Path (should be accessible from Sage CRM server):

   _____

3) Sage 300 Application login credentials (**with admin rights**) to be used for the integration:

4) Username: _____ Password: _____

5) Has the Sage 300 Web-API user been created? Yes   No

   a.   If none has been created, do you want us to create this? Yes   No

   b.   If yes, provide the Web-API user: _____ Web-API user/pw: _____

6) Sage 300 Company Code(s) to integrate with Salesforce:

   _____

7) Sage 300 Contact: _____

   Email Address: _____ Phone: _____

Please email completed form to your My CRM Manager Project Manager