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

Today's Date: _____

Company Name: _____

**\*Note: there are <u>3 sections</u> 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:

- Create the username **gumu.#comp_name#@greyrtix.com** (where #comp_name# = your company name) with the email address **salesforce@greytrix.com** for the user in Salesforce OR you can provide us with one for an existing user (this user needs to have 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.

- 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.

- 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: _____

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:

   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 [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

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.

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

   *We will be installing the integration component (module name is GUMU) within the Sage 300 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:

   _____

6) In the network firewall, we require you to whitelist:

   a. Salesforce IP's address based on your [instance type](#) so that the URL is accessible within Salesforce.

      i. Salesforce non-Hyperforce IP:

         https://help.salesforce.com/s/articleView?id=000321501%26type=1

      ii. Salesforce Hyperforce IP:

         https://help.salesforce.com/s/articleView?id=000394078&type=1

   b. Greytrix's IP 49.248.14.234        Please confirm #6 has been completed

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

   _____

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

   a. Username: _____ Password: _____

4) Sage 300 Web-API login credentials:

   a. Username: _____Password: _____

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

   a. Test company code: _____

   b. Live company code: _____

6) Sage 300 Contact: _____

   Email Address: _____ Phone: _____

Please email completed form to your My CRM Manager Project Manager