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

Today's Date: ____________________

Company Name: ____

***Note: there are <u>2 sections</u> within this checklist, which may require info from 2 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 Intacct Salesperson codes to Salesforce users. In the absence of a corresponding Salesforce user to a Sage Intacct 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#@greyrtix.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:
   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 SAGE INTACCT PARTNER

1) We will use this Sage Intacct Web service URL: https://api.intacct.com/ia/xml/xmlgw.phtml
2) Sage Intacct user (normal user): ________________ password: ________________

   This user is used for testing purposes only when the integration team is configuring the GUMU. This user account can be disabled once we have completed testing.

3) Sage Intacct Sender ID: ________________ Sender ID password: ________________

   - For #3 the Sage Intacct Sender ID and Sender password, an Intacct web-developer license is required, and the client must use their own Sender ID. This Sender ID is what is used for API calls. This web-developer license must be purchased as part of the client's Intacct subscription.
   - Additionally, you will need to authorize this Sender ID and Sender Password within Sage Intacct. Sender ID Web service authorization - GREYTRIX Has this been completed?

4) Intacct Web Service User ID: ________________ Web Service Password: ________________

   - For #4, The Sage Intacct User ID is the web services user defined in Sage Intacct. So, a web services user must be created in Intacct and shared with us. For the web services user, please set up the User ID / Username as **GUMU / GUMUuser** Create Web service user - GREYTRIX

5) Sage Intacct company code: ________________
6) Sage Intacct Contact: ____________________________________

   Email Address: __________________________ Phone: __________________

Please email the completed form to your My CRM Manager Project Manager