PRE-INSTALLATION CHECKLIST FOR
GUMU™ Salesforce Integration to Sage X3

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:

- 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™.

- This integration does not consume a Salesforce user license.

- The GUMU™ Integration uses Sage X3 Web-Services URL to fetch records from Sage X3 and synchronize them to Salesforce. These Web-Services can be found in the administration tab under the Web-Service module in the list of SOAP Generic Web-Services.

- 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.

1) Salesforce Access Credentials:

    a) Production URL: _____

    b) Production username: _____

    c) Production password: _____

2) Salesforce Sandbox Credentials:

    a) Sandbox URL: _____

    b) Sandbox username: _____

    c) Sandbox password: _____

    d) Sandbox Security Token: _____

    e) 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 that #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 X3 server that Sage X3 has been installed on. This can be via remote access, VPN, Team Viewer, Or LogMeIn.

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

   _____

2) Sage X3 Pool – Kindly create a separate Sage X3 pool for each Folder (Test and Live). Please confirm this has this been completed

3) Sage X3 Web-service URL should be mapped to a domain or sub-domain pointed to a secured Network. Salesforce supports the port in the range from 7000 to 10000.
   Once the bindings are done with the port, the URL should be mapped to a domain or a sub-domain to be accessible over the web. The domain or sub-domain would be connected/mapped using SSL (for secured connection) to the port of a system that connects to the Sage X3 Web services. The Web-service URL should be like the below:

   https://<<Domain Name>>:portnumber/adxwsvc/services/CAdxWebServiceXmlCC?wsdl

   *We will be installing the integration component (module name is GUMU) within the Sage X3 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:

   _____

4) 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 and Backup IP: 114.143.249.38 (optional).
   c. Please confirm #4 has been completed

5) IT Contact: _____
   Email Address: _____ Phone: _____

Section 3 - REQUIRED INFORMATION FROM SAGE X3 PARTNER

1) Sage X3 version number: _____ Product update date: _____

2) Sage X3 Home Directory Path:

   _____

4) Sage X3 Windows server name: _____

5) Sage X3 Windows login details (Admin Level):
   a. Username: _____
   b. Password: _____

6) Sage X3 Web URL (format for reference: http://<<DomainName>>:8124/index.html):

   _____

7) Sage X3 Application login details (Admin Level):
   a. Username: _____
   b. Password: _____

8) Sage X3 folder name to integrate (Test): _____

9) Sage X3 folder name to integrate (Live): _____

10) Sage X3 Web-service Pool Name which can be used to configure GUMU:
   a. Pool username: _____
   b. Pool password: _____

11) SQL Server Name: _____
   a. SQL username: _____
   b. SQL password: _____

12) Sage X3 does not include the necessary webservices required for the GUMU™ Connector for Sage X3. This link Sage X3 Patch includes the necessary files along with installation instructions for the webservices used by GUMU™ Connector in Sage X3.

- Greytrix will install and publish separate Integration patches over the Sage X3 Folder to which the Integration must be connected. These custom patches are essential to fetch records from Sage X3 and have them synchronized to the corresponding objects in Salesforce. Along with this, these patches were developed as per the Sage standards, and data is flown through an encrypted channel to Salesforce objects.

- Please note that all the data is exchanged using the GUMU™ link and it does not have its database for storing or processing the data. The data will either get stored securely in the Salesforce cloud environment or Sage database based on the direction the data is routed to.

- Please confirm that #12 has been completed

13) Sage X3 Contact:_____

Email Address: _____ Phone: _____

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