PRE-INSTALLATION CHECKLIST FOR SAGE 100 GUMU™ INTEGRATION

All sections of this pre-installation checklist must be completed prior to the installation of Sage CRM.

Today's Date: _____   Company Name: _____

SECTION 1

REQUIRED INFORMATION FROM SAGE PARTNER

1. Sage 100 version number: _____ Product update date: _____

2. Sage 100 Edition: Standard   Advanced   Premium

3. Sage 100 Home Directory Path (should be accessible from Sage CRM server):

    _____

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 Sage CRM:

    _____

6. Sage 100 TEST Company Code names to integrate with Sage CRM (if applicable):

    _____

7. List of third-party add-ons (modules) and/or automated processes within Sage 100:

    _____

8. 1-2 DAYS BEFORE THE INSTALLATION: take a complete backup of Sage 100.

9. Note: We will email you when the installation is scheduled.

10. The Sage 100 workstation setup MUST be installed on the Sage CRM server if Sage CRM is on a different server than Sage 100.

11. The Sage 100 ODBC 64-bit driver MUST be installed on the Sage CRM server AND the Sage 100 server if they are on different servers, or the Sage CRM/Sage 100 server if they are on the same server.

Sage 100 CONTACT INFO

Sage 100 Contact: _____

Email Address: _____ Phone: _____

ADDITIONAL INFO/COMMENTS

_____

SECTION 2

PREREQUISITES FOR IT TEAM

1. If Sage 100 and Sage CRM are on different servers, both should be in the same domain …

2. Microsoft .Net framework v2.0, 3.5, 4.0 and 4.5 must be installed on Sage 100 and Sage CRM servers …

3. Domain Admin user should be able to log in to both the Sage 100 and Sage CRM servers …

4. Sage 100 application dedicated user should have Admin level rights …

5. When installing new Sage CRM related software on the CRM server, sometimes a server restart is required. May we reboot the CRM server before 7am local time? Yes   No

6. You must understand that the Sage CRM integration (published by Greytrix) is configured in part by the Greytrix technicians in India (Mumbai). I understand…

7. Your firewall's geo-settings must allow for access from India OR at least the following IP addresses: …

    1. 49.248.14.234

    2. 114.143.249.38

    3. 36.255.85.172

    4. 14.99.133.190

    5. 106.51.36.30

    6. 106.51.77.168

8. Initially installing the integration can take up to 8-hours. This will happen outside of regular business hours and requires all Sage 100 users to be out of the Sage 100 system and all Sage 100 processes to be stopped. I understand…

REQUIRED INFORMATION FROM IT TEAM

1. We require the following credentials for remote access (RDP) and Admin level rights to the server(s) that Sage CRM will be installed on:

    a. URL of VPN server if a VPN connection is required:

    _____

    b. VPN client type (preferably Cisco, SonicWall, Windows VPN / L2TP/IPsec):

    _____

    c. VPN details: _____

    d. VPN Username: _____ VPN Password: _____

    e. URL(s) or IP Address(es) of RDP server(s): _____

    f. RDP Username: _____ RDP Password: _____

    g. Windows Service Account Username: _____ Account password: _____

    *The Windows service Account is used to configure the integration with Sage 100; therefore, the password associated with this account must be set to never expire.

2. Sage 100 Windows server name: _____

   a. Sage 100 Windows server credentials (**with admin rights**):

   Username: _____ Password: _____

3. Are Sage 100 and Sage CRM on the same server?

   a. Yes   IF YES (**same server**), the Windows user must be the local Administrator user

   b. No   IF NO (**2 distinct servers**), the Sage 100 workstation setup MUST be installed on the Sage CRM server *AND* we require a domain user, which is part of the Administrator and Power User group

4. If Sage 100 Premium is used, we will require access to the SQL server hosting the Sage 100 database as well as the sa password for that SQL database

   a. Server for SQL (if Premium is used) _____

   b. SQL sa password (or equivalent user/pw) _____

ADDITIONAL INFO/COMMENTS FROM IT TEAM

_____

NOTE – before applying any upgrades or patches to Sage accounting, please ensure you have taken a copy of the Sage CRM folder and Sage CRM database.

SECTION 3

REQUIRED INFORMATION FROM CLIENT

1. Do you have Vendors in Sage 100 that will be imported to Sage CRM? Yes   No

2. Do you have Products in Sage 100 that will be imported to Sage CRM? Yes   No

3. Will you be creating Quotes in Sage CRM that will convert to Orders? Yes   No

4. Will you be creating Orders in Sage CRM that will promote to Sage 100? Yes   No

5. Do you want to be able to edit Orders in Sage CRM after being promoted to Sage 100? Yes   No

6. Do you want to be able to create A/R Invoices from Sage CRM? Yes   No

7. Will each Sage CRM User be mapped to a single Sage 100 Salesperson or multiple Sage 100 Salespersons?

   - *One to One*: Sage CRM Account Manager "John Doe" mapped to Sage 100 Salesperson "01-John Doe" …

   - *One to Many*: Sage CRM Account Manager "John Doe" mapped to Sage 100 Salesperson "01-John Doe" **AND** Sage 100 Salesperson "02-Jonathon Doe" …..

8. Phone number will be a single field. Which phone number format do you prefer?

   - (123) 456-7890 …   123-456-7890 …..

9. Do you require Sage 100 products to sync with Sage CRM in real time? Yes   No

   a. How many Products do you currently have in Sage 100? _____

   b. How often do you add new Products (i.e. daily, weekly, monthly, rarely)? _____

   Please note that the synchronizing of data (inventory, customers, etc.) between CRM and Sage 100 does not automatically recognize changes applied to Sage 100 that are not made from the Sage 100 application itself. For example, if data were updated in Sage 100 via Visual Integrator (or any mass update utility), then your administrator may be required to re-sync data with Sage CRM. This also applies to all data updates (not just products) such as customer updates where, for example, the salesperson code is mass updated.

10. Do you use Sage 100's Kitting features? Yes   No

    a. Do you want this enabled in Sage CRM? Yes   No

11. Do you use Lot Numbers or Serialized Inventory? Yes   No

12. What is your fiscal year? _____

13. Select the Customers you want imported from Sage 100 to Sage CRM

    Active   Inactive   Temporary   All

PRIOR TO THE INSTALLATION OF THE INTEGRATION

1. All Sage 100 users should be out of system during GUMU™ installation.

2. All Sage 100 processes should be stopped during GUMU™ installation.

EMERGENCY CONTACT INFO

While CRM emergencies are rare, we will need an emergency contact in the unlikely event that there is an urgent need to reach someone at your company outside of business hours.

Emergency Contact: _____ Phone: _____

ADDITIONAL INFO/COMMENTS

_____

INTERNAL USE FOR MY CRM MANAGER

1. Path of Sage CRM setup files from the Sage CRM server which can be used to install Sage CRM:

   _____

2. Sage CRM version number: _____ Product update date: _____

3. URL for Sage CRM: _____

4. Sage CRM Application credentials (Admin level):

   Username: _____ Password: _____

5. MS SQL sa password: _____

6. SQL server Instance Name: _____

7. SQL server Login Details (Admin Level):

   Username: _____ Password: _____

8. Set 'Use area code' to **No** under System Behavior …