

PRE-INSTALLATION CHECKLIST FOR SAGE 300 INTEGRATION

Today's Date:

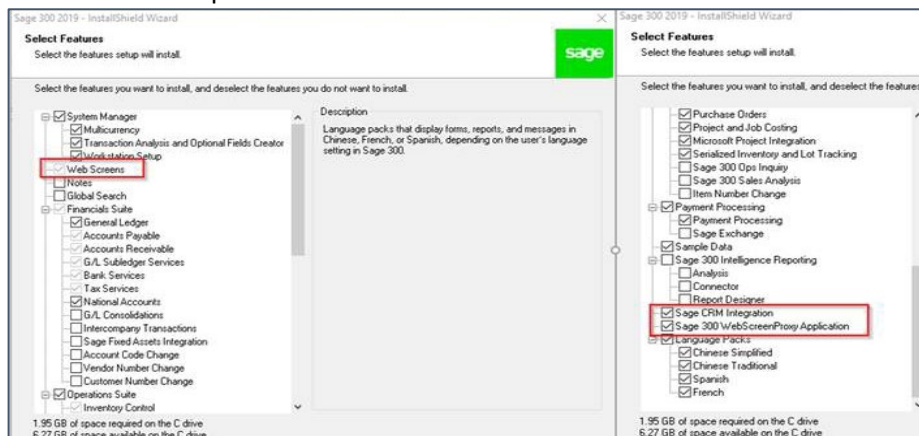
Company Name: _____

REQUIRED INFORMATION

1. Will Sage CRM be installed on the same server as Sage 300? Yes No
 - a. If No, the Sage CRM server must have a full installation of Sage 300 v2019 or later and the Sage 300 Web Screens must be configured on the Sage 300 instance of the Sage CRM server
 - b. The installation on the Sage CRM server must be a full install of all the Sage 300 modules that are on the other Sage servers (Workstation Setup is not sufficient)
 - c. The Sage 300 instance/version on the Sage CRM server must match the primary Sage 300 installation

2. If upgrading and using the same servers, remove the existing Sage CRM Synchronization Component from all machines, and previous Sage 300 ERP version modules from all servers, including:
 - a. Sage 300 .NET remoting
 - b. Web deployment
 - c. Sage 300 Portal
 - d. Sage CRM integration (EW module)

3. The following Sage CRM Integration Components must be installed by the client or ERP partner on the CRM server. The Sage CRM module should be installed on all servers and workstations that have the ERP thick client installed.
 - a. Web Screens
 - b. Sage CRM Integration
 - c. Sage 300 WebScreenProxy Application
 - d. The Sage CRM Integration module must be activated, in all databases desired to integrate, by the client or ERP partner



4. Install the Sage CRM Integration Component, using the Sage 300 Admin user account, on all Sage 300 ERP servers and all workstations that have Sage installed (either workstation setup or full client install)
[Refer to this link for the latest Sage 300 CRM integration compatibility chart](#)
 5. Ensure you install the latest Product Update related to the Sage 300 version you are using
 6. ALL companies, across ALL servers, must have 32 bit ODBC DSNs created for each Sage SQL db
 7. Configure Portal Database
 8. Names/IPs of other servers where Sage 300 is installed:

 9. Name/IP of Domain Controller server (we need access to all servers where Sage 300 ERP is installed):

 10. Sage 300 Admin account Password: _____
 11. What Sage 300 databases are to be connected to Sage CRM?

 12. Allow access to the Web API for the Sage 300 Admin user (KB 92825) by following the instructions in this 6-minute video or the below steps: [Sage 300 CRM integration corrections to Web Security](#)
- Steps to allow access to the Web API (install path for Sage 300 may differ):
- a. Edit each of these web.config files by following the same steps:
 - i. C:\Sage\Sage300\Online\Web
 - ii. C:\Sage\Sage300\Online\WebApi
 - b. Open the first file in Notepad or similar editing app
 - i. Search for this line: <add key="AllowWebApiAccessForAdmin" value="false" />
 - ii. Change "false" to "true" leaving the rest of the file exactly the same
 - iii. Save the file
 - iv. Repeat for the second file
 - v. Open Command Prompt via Run as Admin
 - vi. Run command IISRESET to restart IIS
 - vii. Click around in Sage 300 Web Screens to make sure they work (http://INSERT SERVER NAME/sage300)
 - viii. Make sure the Web API is working (http://INSERT SERVER NAME/sage300webapi)
 - ix. Note: The Sage 300 Web Screens must be working correctly before the integration work can begin.
13. 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



TASKS WE WILL COMPLETE

1. Configure IIS
2. Configure CRM-side integration

Note: During Sage CRM installation/integration, a CRM user will be auto created to allow the system to access Sage 300; the username will be "CRM" and should not be changed.

3. Configure ERP-side integration
4. Synchronize the data from ERP to CRM including importing Customer, Ship-To, National Account, Vendor, and Remit-To records
5. Ensure bi-directional synchronization is working and that data is flowing and visible between applications

SAGE 300 CONTACT INFORMATION

Sage 300 Contact: _____

Sage 300 Email: _____ Sage 300 #: _____

Preferred Method of Communication:

Note: 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: _____ Emergency #: _____

ADDITIONAL INFO/COMMENTS

Please email completed form to Dan Cousins and your Project Manager, April Braun or Sheila Campolieto
dan.cousins@mycrmmanager.com | april.braun@mycrmmanager.com | sheila.campolieto@mycrmmanager.com