

PRE-INSTALLATION CHECKLIST FOR SAGE CRM

Sage CRM is a web-based application that sits on an MS SQL database and is published by IIS. If possible, we would like to install Sage CRM on its own application server. Here is a link to the hardware/software requirements for Sage CRM, published by Sage: [System Requirements](#). Below is our installation checklist.

Today's Date:

Company Name: _____

PREREQUISITES

- SQL Server Management Studio installation and accessibility on the CRM application server
- Current versions of Sage CRM (v2022) have dependencies on the latest versions of Microsoft.Net, so the CRM application server must have ASP and ASP.NET installed and enabled within IIS
- Requirements for Accelerator (the Outlook integration)

 - Microsoft.Net v4.7.2 must be installed on the CRM application server
 - 32bit version of ASP.NET must be installed and enabled on the CRM application server

REQUIRED INFORMATION

1. High-level summary of the environment:

2. 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: _____

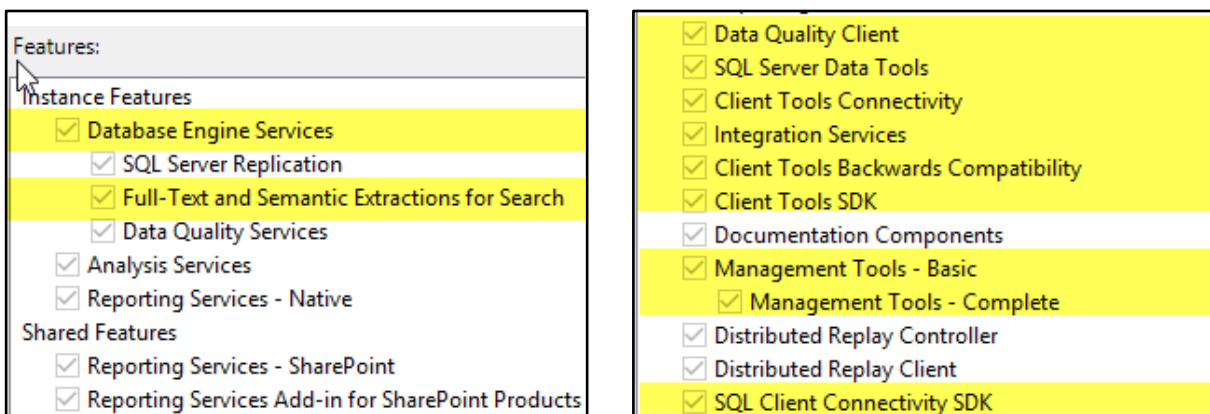
g. List the version(s) of Microsoft .Net framework installed on the server allocated to Sage CRM:

3. Name of Domain: _____

4. Allow Administrator level rights on the server(s) to allow us to do the following:
 - a. Copy and move files
 - b. Reset IIS
 - c. Install any software
 - d. Back up the SQL database
 - e. Ability to reboot the server
 - f. The credentials we need on the network must allow us to add roles & features on the server using server manager

Note: Sometimes we require the server to be rebooted, make sure there is no USB, or any other device, connected to the server that might affect the boot sequence.

5. Install SQL Standard Edition version 2017 or 2019 (*not Express*). The CRM Team at My CRM Manager does not install MS SQL, this is the responsibility of the client's IT Team. When installing SQL, ensure you have selected all the checkboxes in the image below.



Note: While our team specializes in the Sage CRM application, we are not equipped to assume responsibility for managing MS SQL patches and upgrades or troubleshooting any issues related to SQL and the server operating environment. The client's IT team will be responsible for installing MS SQL as outlined in the agreed upon proposal.

Additionally, the CRM Team at My CRM Manager cannot be responsible for applying any updates to SQL as this can have an adverse effect to other applications connecting to the same SQL server (beyond Sage CRM).

6. Version of MS SQL being used:

7. Name of the server MS SQL has been installed on:

8. MS SQL sa password: _____

9. MS SQL Management Studio must be installed on the CRM application server (link below).

- a) If Sage CRM and the database are the same box, then install SQL Server and the SQL Management Studio.

- b) If Sage CRM and the database are on different boxes, then:
 - a. Install SQL Server and SQL Management Studio on the database server
 - b. Install SQL Client on the CRM application server along with SQL Management Studio
 - c. Make sure that the sa credentials provided connects successfully

[Download SQL Server Management Studio](#)

- 10. Server OS Version: _____
- 11. Set network security settings to enable us to download software from [Sage Partner Portal](#)
- 12. In addition to the default browser on the CRM application server, ensure Chrome is installed
- 13. If Sage CRM will not be available via an external URL, please ensure that MS Word, MS Excel, and Adobe Reader are installed on the CRM application server
- 14. Ensure that Notepad ++ is installed on the CRM application server
- 15. Ensure that IIS is installed on the CRM application server (to prevent disruption of the other programs that use IIS, Sage CRM should not share IIS with any other applications that use IIS; let us know if you have other applications running on IIS)

Aside from installing IIS, we require you to configure IIS Web-Server Roles & Features

Other applications running on IIS, if applicable:

- 16. Define the drive you would like Sage CRM installed on:

Note: This installation drive is by default where Sage CRM stores log and library files. We recommend you provide us with a secondary drive (if possible) which we can use for the largest log and library files. It is common that these files can grow to several hundred GB over time. Even if we do move the paths for the two sets of files, we will still need a minimum of 25GB of available space on the drive where Sage CRM has been installed.

- 17. Provide us with hard drive space somewhere on the network (Somewhere between 250GB and 1TB) and label the folder MCM (we will use this folder for all media related to Sage CRM including back-ups, downloads, data related to Sage CRM upgrades, etc.)
- 18. We will provide you with a PDF document defining the CRM files to be backed up and the frequency. Beyond the external backups that your IT department might take, we will need backups applied to the new MCM drive. The Sage CRM team is not responsible for backing up the Sage CRM system.

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.



POST-INSTALLATION RESPONSIBILITIES OF IT TEAM

Once Sage CRM is up and running, the client’s IT team will be required to complete the following tasks and be aware of certain key points:

1. IT will need to create an external URL to Sage CRM (Sage CRM is published to your corporate Intranet via IIS, we recommend you create an external URL by mapping Sage CRM to a static public IP and then pointing a valid domain name to this IP that could look like <https://crm.<yourcompany>.com/>; you can apply a security certificate at this time; use the following link for [How to Set Up SSL on IIS 7](#))
 - a. The SSL certificate should be acquired from a Certificate Authority (CA)
 - b. Make sure the external URL works both inside the LAN as well as on the CRM application server
 - c. Ensure the internal URL for Sage CRM still works after applying the certificate
 - d. We acknowledge that working with SSL certificates may be new territory for you. If you need assistance with this task, we can provide a third-party contact (our hosting provider) who is very familiar with the process and can assist you. Please let us know if you would like the contact info.
2. IT will need to configure Sage CRM to send outbound emails. We will send you a separate document.
3. Do not install Java updates on the server. Sage CRM manages its own Java Runtime shipped by Sage Installer and if disrupted, various components will fail (i.e. Dashboards, Reports, Exports, Tomcat, etc.). CRM only works with certain, already tested, versions of Java. **PLEASE DO NOT INSTALL ANY NEW VERSIONS OF JAVA.**
4. 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

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.

CONTACT INFORMATION

IT Contact: _____

Email Address: _____ Phone: _____

Preferred Method of Communication: Phone Email

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

Please email completed form to your Sage CRM Project Manager