



### PRE-INSTALLATION CHECKLIST FOR SAGE CRM

Sage CRM is a web-based application that uses an MS SQL database and publishes via IIS. Here is a link to the hardware/software requirements for Sage CRM v2024, published by Sage: [Sage CRM Help Center](#).

Today's Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

### As you are planning this environment...

- The SQL server and the Sage CRM application can be on the same machine, however if they are on the same machine, remote users should not be logging onto the server hosting SQL as this creates memory issues.
- Sage CRM has 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: \_\_\_\_\_

\*If using Cisco AnyConnect - The VPN connection provided to the CRM team must accommodate our technicians installing the VPN on 1-machine but remoting to that machine from another machine on our network. Some VPNs (Cisco AnyConnect) do not allow VPNs to work from secondary machines by default, but this is a security policy within the VPN that you can adjust.

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

- 49.248.14.234

- 114.143.249.38
- 36.255.85.172
- 14.99.133.190
- 106.51.36.30
- 106.51.77.168

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

\_\_\_\_\_

g. RDP Username: \_\_\_\_\_ RDP Password: \_\_\_\_\_

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

\_\_\_\_\_

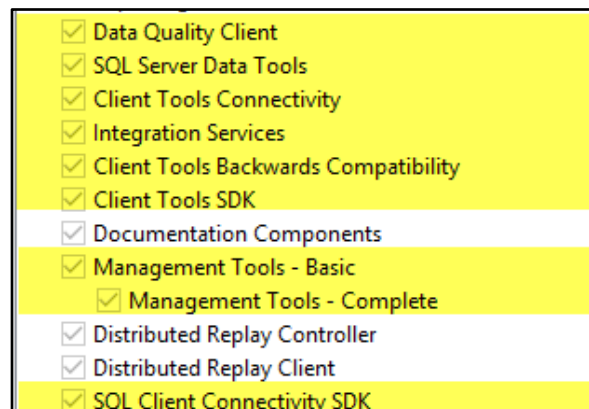
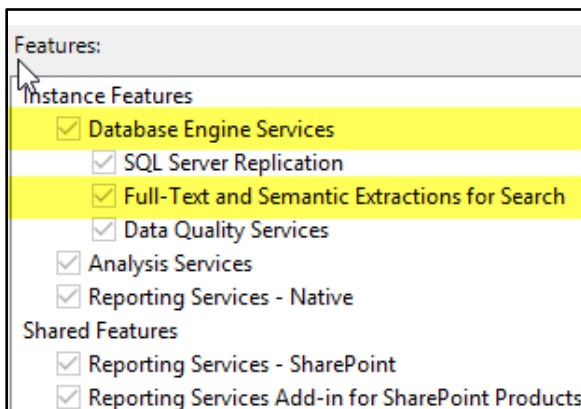
i. Name of Domain: \_\_\_\_\_

3. 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.

4. Install SQL Standard Edition version 2019 or 2022 (*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 highlighted in the image below.



5. Version of MS SQL being used:

\_\_\_\_\_

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

\_\_\_\_\_

7. MS SQL sa password (sa or sa equivalent): \_\_\_\_\_

8. 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](#)

9. Server OS Version: \_\_\_\_\_

10. Set network security settings to enable us to download software from [Sage Partner Portal](#) .....

11. Ensure both Chrome and Edge are installed .....

12. 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 .....

13. Ensure that Notepad ++ is installed on the CRM application server .....

14. 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) .....

- a. Aside from installing IIS, we require you to configure IIS Web-Server Roles & Features .....
- b. Let us know what other applications are running on IIS, if applicable:

\_\_\_\_\_

15. 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.

16. 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.) .....

17. 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.



## 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. 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.
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

### CONTACT INFORMATION

IT Contact: \_\_\_\_\_

Email Address: \_\_\_\_\_ Phone: \_\_\_\_\_

### ADDITIONAL INFO/COMMENTS

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