



### 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 Management installation and accessibility .....
- Current versions of Sage CRM (v2021) have dependencies on Microsoft .Net; in most cases v2.0, v3.5, v4.0 and v4.5 should be installed on the Sage CRM application server .....
- CRM application server must have ASP and ASP.NET and they should be enabled within IIS .....

#### 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 .....

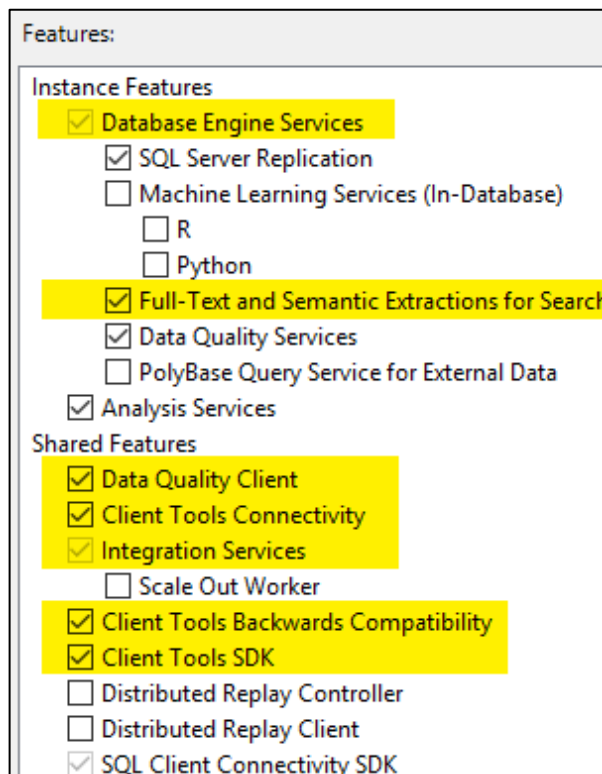
**Note:** Sometimes we require the server to be rebooted, make sure there is no USB, or any other device, connected to the server that might affect the boot sequence.

5. Install SQL Standard Edition (*not Express*). If you do not already have it, the easiest and least expensive way to get SQL Standard Edition is through Sage (their licensing agreement with MS is referred to as Sage SQL Runtime Edition). To download and install the Sage SQL Runtime Edition, follow the steps below:

- a. Install MS SQL – licensing for this will be provided by Sage and the version is MS SQL 2017 or 2019 Standard Edition. Here is the link to download it: [Dropbox](#) .....

**Note:** There is no license key required for this instance of MS SQL. When installing SQL, it must allow for SQL Authentication. When we install Sage CRM, the installer prompts us to enter the sa password. So, SQL Authentication must be enabled, and we will need to know the sa password.

- b. Install each of the items listed below: .....



**Note:** The CRM team does not install MS SQL as part of the project or manage SQL beyond Sage CRM’s relationship with MS SQL. 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.

6. Version of MS SQL being used (if other than Sage MS SQL Runtime Edition):

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

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8. MS SQL sa password: \_\_\_\_\_

9. If MS SQL is on a separate machine, then SQL Management Studio must be installed on the CRM application server .....

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 you have on the CRM application server, ensure Chrome is installed .....

13. 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) .....

Other applications running on IIS, if applicable:

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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.

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17. Provide us with 1TB of hard drive space somewhere on the network (or provide what you can) and label the folder DCAA (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 1TB drive. The Sage CRM team is not responsible for backing up the Sage CRM system.

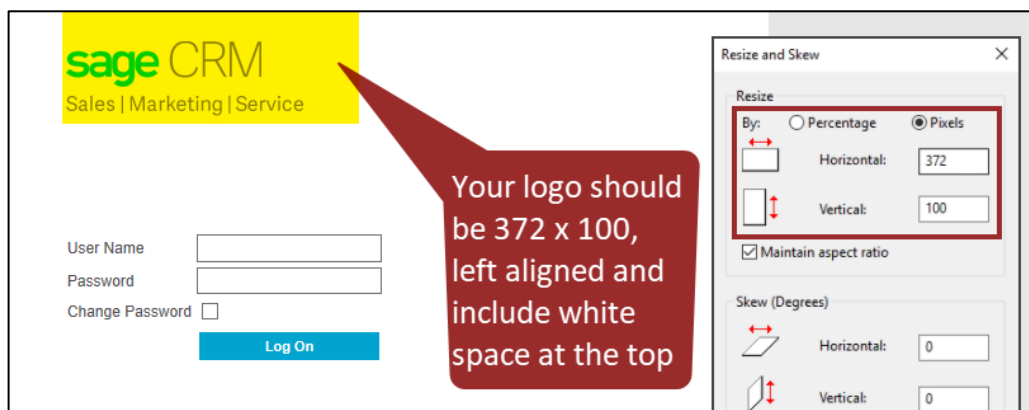
### POST-INSTALLATION RESPONSIBILITIES OF IT TEAM

Once Sage CRM is up and running, the client's IT team will be required to complete the following tasks:

1. Verify that the Sage CRM server is added to all users' workstation browsers as a "Trusted Site" within the browser to ensure no script files are blocked by the browser .....
2. If using IE, verify the following settings are disabled under Internet Options:
  - a. Compatibility Settings: "Display Intranet Sites in Compatibility Mode" is unchecked .....
  - b. Security tab: Turn off "Enable Protected Mode" .....

**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.**

3. Expose Sage CRM to the Internet (Sage CRM is published to your corporate Intranet via IIS, we recommend you expose Sage CRM to the Internet 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/>; companies often acquire and 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 new exposed 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.
4. Provide a corporate logo to add to the Sage CRM login screen; the image should be 372 (w) x 100 (h), left aligned, and include a white border around the logo itself, with more space at the top .....



- Sage CRM has the capacity to send out emails. While CRM is not a good substitute for Outlook, it is practical for automatic messages (i.e. in the workflow, we can create a rule to automatically notify the salesperson when their Quote is ready) and storing commonly used email templates.

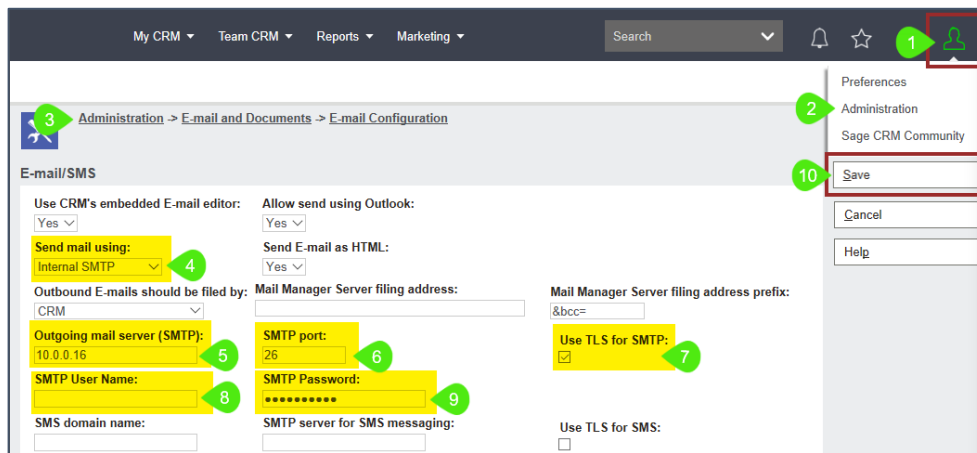
The email configuration screen within Sage CRM (see below image) defines how Sage CRM will pass emails to the network. Often this is just passing emails to the SMTP service on the Sage CRM application server.

For Sage CRM to successfully send out emails, the credentials for the fields highlighted in the image below must be correct. You can provide us with these credentials or populate them yourself and test.

**We also need a valid email address for CRM to send emails 'From'.**

### Administration > Email and Documents > Email Configuration

- (#4) Replace default 'Send mail using' with 'Internal SMTP'
- (#5) Enter 'Outgoing mail server (SMTP)'
- (#6) Enter corresponding 'SMTP port'
- (#7) If applicable, select 'Use TLS for SMTP'
- (#8) If applicable, enter 'SMTP User Name'
- (#9) If applicable, Enter 'SMTP Password'



The screenshot shows the 'E-mail/SMS' configuration page in Sage CRM. The page has a dark header with navigation menus (My CRM, Team CRM, Reports, Marketing) and a search bar. A user profile icon in the top right is highlighted with a green circle '1'. The main content area is titled 'Administration -> E-mail and Documents -> E-mail Configuration' and is highlighted with a green circle '3'. On the right side, there is a sidebar with 'Preferences', 'Administration', and 'Sage CRM Community' links, and a 'Save' button highlighted with a green circle '10'. The main configuration area contains several sections: 'Use CRM's embedded E-mail editor' (Yes), 'Allow send using Outlook' (Yes), 'Send mail using' (Internal SMTP, highlighted with a green circle '4'), 'Send E-mail as HTML' (Yes), 'Outbound E-mails should be filed by' (CRM), 'Mail Manager Server filing address' (empty), 'Mail Manager Server filing address prefix' (&bcc=), 'Outgoing mail server (SMTP)' (10.0.0.16, highlighted with a green circle '5'), 'SMTP port' (26, highlighted with a green circle '6'), 'Use TLS for SMTP' (checked, highlighted with a green circle '7'), 'SMTP User Name' (empty, highlighted with a green circle '8'), 'SMTP Password' (masked with dots, highlighted with a green circle '9'), 'SMS domain name' (empty), and 'SMTP server for SMS messaging' (empty). There are also 'Cancel' and 'Help' buttons at the bottom right.

**Note:** If you are using Office 365, we recommend you use the Sage CRM application server for outbound emails rather than `smtp.office365.com`. With Office 365, you have to give the mailbox used in Sage CRM 'send as' rights on the mailboxes of each Sage CRM user. To avoid confusion and unnecessary maintenance, its best to use the SMTP service on the Sage CRM application server.

To prevent system generated emails from being sent to the recipient's junk folder, you can create an email address to be used in the 'From' field (i.e. [info@company.com](mailto:info@company.com), [yourteam@company.com](mailto:yourteam@company.com)).

Provide an email address you would like to use:

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**Note:** We also recommend adding a note at the end of email templates being sent from the system saying: *This is an automated email and replies will not be received. If you have questions, please email [xxx@company.com](mailto:xxx@company.com).*

- 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: \_\_\_\_\_

Preferred Method of Communication:

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**

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