

Sage 100 Contractor 2017 v20.5

Quick Start Checklist

Review this checklist before you install Sage 100 Contractor 2017 and set up your company or migrate your company from version 19.8.

1. Review hardware and software requirements

Verify that the computer on which you plan to install Sage 100 Contractor 2017, and each workstation that requires access to Sage 100 Contractor 2017, meets the minimum system requirements.

For current requirements, see the Knowledgebase article *System Requirements: Sage 100 Contractor 2017 version 20.5* at:

<https://support.na.sage.com/selfservice/viewdocument.do?externalId=79790>.

Important! Software not listed in the System Requirements article have not been tested by Sage Software, and are not supported. If you try to use a newer version of the software, or use software not listed, you may encounter technical difficulties.

- Confirm that the Sage 100 Contractor 2017 server meets the minimum *system* requirements.
- Confirm that each client workstation meets the minimum *system* requirements.
- Confirm that the server and each workstation meet the minimum *software* requirements (database, operating system, Microsoft programs, and so on).

2. Review the Sage 100 Contractor 2017 documentation

Read and understand the following documentation before you proceed with installation:

- Sage 100 Contractor 2017 Release Notes* ([U.S.](#); [Canada](#))
- Sage 100 Contractor 2017 Installation and Administration Guide* ([U.S.](#); [Canada](#))
- Sage 100 Contractor 2017 Database and Company Administration Guide* ([U.S.](#); [Canada](#))

3. Install and set up Sage 100 Contractor 2017

- 1. Install Sage 100 Contractor 2017 on the machine you will use as the license server, choosing the options to install the License Server and Database Administration.

Important! This machine should be the server where your version 19.8 license server is located. Sage 100 Contractor 2017 was designed to co-exist with version 19.8 and share the same license entitlements.

- 2. Use the Database Administration tool to connect your company database to Microsoft SQL Server.

Tip: If you do not have an instance of Microsoft SQL Server, click the link to install and configure SQL Server Express.

- 3. Use the Database Administration tool to deploy the Sample Company data.

4. Migrate your company from version 19.8

Use Database Administration for Sage 100 Contractor to migrate your company to version 20.5. If you have multiple companies, migrate your principal company and complete the remaining tasks on this checklist for that company. Do the same for other companies, later.

- Use the Database Administration tool to migrate your Sage 100 Contractor company folder from version 19.8.
- Use the Database Administration tool to migrate your custom reports.
- Migrate archive companies, as needed. (You can leave your archive companies in version 19.8 if you prefer.)

5. Ensure that company administrators and sysadmin users have administrator rights on the server

- Make sure that users who will have company administrator or sysadmin rights in Sage 100 Contractor 2017 also have Windows administrator rights on the server that is hosting your SQL Server database.

Note: You may need to work with your IT department to accomplish this task.

6. Assign permissions to sysadmin users

- Use the Database Administration tool to assign sysadmin rights to at least one other user.

7. Assign permissions to company administrators

- In Sage 100 Contractor 2017, use the **7-2-2 User List** to designate former supervisor users as company administrators.

Tip: See the User List help for tips on copying Supervisor defaults from version 19.8 to company administrators in version 20.5.

8. When you and your users are ready, use Sage 100 Contractor 2017 in a production (“live”) environment.

- Before using Sage 100 Contractor to process current transactions in a production environment, follow the steps in the [“Going Live” Checklist](#) to move your company data to your production environment, migrate scheduled reports and alerts, make sure third-party applications that read and write to Sage 100 Contractor are connected properly to your new company database, and stop using version 19.8.