Sage 100 Contractor v23.1
Quick Start Checklist

Review this checklist before you install Sage 100 Contractor 2021 and set up your company.

1. Review hardware and software requirements

Verify that the computer on which you plan to install Sage 100 Contractor 2021, and each workstation that requires access to Sage 100 Contractor 2021, meet the minimum system requirements.

For current requirements, see the Knowledgebase article *System Requirements: Sage 100 Contractor 2021* at:

https://support.na.sage.com/selfservice/viewdocument.do?externalId=111361

> **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 If you try to use a newer version of the software, or use software not listed, you may encounter technical difficulties.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 2021 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 2021 documentation

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

☐ *Sage 100 Contractor 2021 Release Notes* (U.S.; Canada)

☐ *Sage 100 Contractor 2021 Installation and Administration Guide* (U.S.; Canada)

☐ *Sage 100 Contractor 2021 Database and Company Administration Guide* (U.S.; Canada)

3. Install and set up Sage 100 Contractor 2021

> **Tip:** If you are upgrading from a version earlier than version 21, you will need to re-enter your Sage client ID and registration name *exactly* as they appear in the License Administration window in the earlier version. To avoid mistyping this information when you re-enter it, we recommend that *before* installing version 23.1, you copy the client ID and registration name from License Administration in the old version to a text document. After installing version 23.1, copy this information from the text document into the new License Administration window.

- [ ] 1. Install Sage 100 Contractor 2021 on the machine you will use as the license server, choosing the options to install the License Server and Database Administration.

- [ ] 2. If you are upgrading from a version earlier than version 21, enter your Sage client ID and registration name *exactly* as they appeared in the License Administration window in the earlier version.

- [ ] 3. 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.

- [ ] 4. Use the Database Administration tool to deploy the Sample Company data.

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

- [ ] Make sure that users who will have company administrator or SQL sysadmin rights in Sage 100 Contractor 2021 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.

5. Assign permissions to sysadmin users

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

6. Assign permissions to company administrators

- [ ] In Sage 100 Contractor 2021, use the **7-2-2 User List** to designate supervisor users as company administrators.

7. When you and your users are ready, use Sage 100 Contractor 2021 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, and make sure third-party applications that read and write to Sage 100 Contractor are connected properly to your new company database.