Sage 100 Contractor v25.3

Migration from v19.8 Checklist

Review this checklist, and then complete each step before you start using version 25.3 to process your current data.

> **Warning!** Do not migrate if you are using integrated products that are incompatible with version 25.3. Before using Sage 100 Contractor v25.3 to process your current data, ensure that all Sage branded and third-party applications that you use with Sage 100 Contractor are compatible with this version and that they can read and write to your version 25.3 database. (See step 8 for additional information.)

1. Pick a "Go Live" Date

☐ With other stakeholders, decide on a "go live" date.

2. Migrate your company from version 19.8

Use Database Administration for Sage 100 Contractor to migrate your company to version 25.3. If you have multiple companies, migrate your principal company first, and then "go live" with your other companies later.

☐ Migrate your Sage 100 Contractor company folder.

☐ Migrate your custom reports.

☐ Migrate archive companies, as needed.

3. 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 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.

4. Assign permissions to sysadmin users

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

5. Assign permissions to company administrators

☐   In Sage 100 Contractor, 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 25.3.

6. Migrate alerts from version 19.8

In Sage 100 Contractor version 25.3, use the **7-6 Alerts Manager** menu to migrate alerts from version 19.8.

> **Important!** Because alerts rely on Windows Task Scheduler, each user must migrate alerts they set up for version 19.8 on each workstation they will use. If alerts are set up to email users, users should make sure they receive the alerts in version 25.3, then delete the alerts from version 19.8 to avoid sending alerts twice.

☐   *User 1*

☐   *User 2*

☐   *User 3*

7. Migrate scheduled reports from version 19.8

In Sage 100 Contractor version 25.3, use the **7-5 Reports** menu to migrate scheduled reports from version 19.8.

> **Important!** Because scheduled reports rely on Windows Task Scheduler, each user must migrate reports they scheduled in version 19.8 on each workstation they use. Make sure that scheduled reports print in version 25.3, and then delete them from version 19.8 to prevent printing them in both versions.

☐   *User 1*

☐   *User 2*

☐   *User 3*

8. Make sure integrated applications point to the v25.3 database

Ensure that all applications that read and write to your Sage 100 Contractor database now read and write to your SQL Server database. You may need to obtain instructions on pointing third-party applications to your version 25.3 database from your business partner.

- ☐ **Sage ACT!** See Knowledgebase article [How to connect Act! with Sage 100 Contractor (SQL) version 20 or later](#)for more information.

- ☐ **Sage Service Operations.** See Knowledgebase article [How to connect Sage Service Operations (SSO) with Sage 100 Contractor (SQL) version 20 or later](#) for more information.

- ☐ **Sage Paperless**. See Knowledgebase article [How to connect Sage Paperless Construction to Sage 100 Contractor (SQL) version 20 or later](#) for more information.

- ☐ **Sage Intelligence Reporting.** We recommend that you install Sage Intelligence version 20 only after your company "goes live" in Sage 100 Contractor version 25.3. See Knowledgebase article [Using Sage 100 Contractor Intelligence Reporting in version 19 and in version 20 or higher](#) for more information.

- ☐ *Other third-party application 1*

- ☐ *Other third-party application 2*

- ☐ *Other third-party application 3*

- ☐ *Other third-party application 4*

9. Stop using version 19.8

- ☐ In version 19.8, remove users from the **7-3-2 User List** to prevent accidental use of the version 19.8 company.

- ☐ Rename the version 19.8 company folder to ensure that it is not accidentally migrated again. Use the format **CompanyNameMigratedMMDDYY** so that users and Customer Support can easily determine that the data was migrated on, say, October 9, 2018.

101. After migration

- ☐ Test ACH reports, if you used them in version 19.8, to ensure that you obtain the same data in version 25.3 as in version 19.8.

- ☐ Test your EFT data, if you used EFT in version 19.8, to ensure that you can create an EFT file with the same data as in version 19.8.