


Installation Checklist

Sage Residential Management Version 14.1

Step	Description	Done
1	Read the Release Notes and the Installation Guide for important information regarding this version of Sage Residential Management and detailed installation instructions.	<input type="checkbox"/>
2	If you are upgrading, create a complete backup of all data and program files for Sage 300 Construction and Real Estate and Sage Residential Management. See “General Information” in Chapter 6 of the Sage 300 Construction and Real Estate User's Guide .	<input type="checkbox"/>
3	Make sure that you install the appropriate operating system service pack before you install. See “Supported Operating Systems” in Section 6 of the Sage Residential Management Installation Guide for more information. Note that Residential Management is not supported on the Windows 8, Windows 8.1, Windows Server 2012, or Windows Server 2012 R2 operating systems.	<input type="checkbox"/>
4	Make sure that your server and workstations meet all other hardware and software requirements, including sufficient hard disk space for program and data files. See “Section 6: System Requirements” in the Sage Residential Management Installation Guide for more information. If you have other applications that use Microsoft Database Engine or Structured Query Language (SQL) database engines, make sure that the database engines are compatible.	<input type="checkbox"/>
5	Quit all programs and services for the duration of the installation. This includes programs that may be running in the background, such as antivirus, email, and backup programs.	<input type="checkbox"/>
6	Install Sage 300 Construction and Real Estate Accounting and Management products Version 14.1 to the server and every computer that will have Residential Management. See Chapter 2 of the Sage 300 Construction and Real Estate User's Guide for detailed instructions as well as the Installation Checklist for that product.	<input type="checkbox"/>
7	Install Microsoft SQL Server 2005 Express to the server and create a SAGERM instance. See “Install SQL Server Express to the Server” in Section 1 of the Sage Residential Management Installation Guide for more information.	<input type="checkbox"/>
8	Install Sage Residential Management Version 14.1.	<input type="checkbox"/>
9	Update the shortcut properties. See “Update Shortcut Properties” in Section 1 of the Sage Residential Management Installation Guide for more information.	<input type="checkbox"/>
10	Create a new database file. See “Create a New Residential Management Database File” in Section 1 of the Sage Residential Management Installation Guide for more information.	<input type="checkbox"/>
11	Restart all programs and services that you shut down for the installation.	<input type="checkbox"/>
12	Start Sage Residential Management.	<input type="checkbox"/>
13	If you have custom Crystal Reports designs, you must upgrade them before they can be used in Sage Residential Management. You can run the new Upgrade Crystal Reports Tool, which is on the programs menu; click [Start], select All Programs > Sage > Sage 300 Construction and Real Estate > Reporting and Other Tools , right-click Upgrade Crystal Reports , and then select Run as administrator . For more information, click  (the help button) in the tool's window.	<input type="checkbox"/>