Sage 300 ERP
Pre-installation Checklist

Completed by		Date

Review this checklist, and then complete each step before you install Sage 300 ERP.

Review Hardware and Software Requirements

Verify that the computer on which you plan to install Sage 300 ERP, and each workstation that requires access to Sage 300 ERP, meets the system requirements described in the *Compatibility Guide*.

- ❑ For current information about minimum system requirements, download the *Compatibility Guide* from the Sage Customer Portal.
- ❑ Confirm that the Sage 300 ERP 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).

  Important: Versions of the software not listed in the system requirements 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 If you try to use a newer version of the software, or use software not listed in the *Compatibility Guide,* you may encounter technical difficulties.

Obtain Activation Codes for Sage 300 ERP Programs

You can run Sage 300 ERP with a temporary license for up to 30 days, but you must enter valid activation codes in the License Manager to use Sage 300 ERP products, including upgrades, after the grace period.

- ❑ Obtain a list of activation codes.

  North American customers should use the Sage Customer Portal to obtain activation codes:

  1. Log in to your account at https://customers.sagenorthamerica.com/irj/portal/anonymous/login.
  2. On the Support menu, click Self Service.
  3. Click the My Products tab.
  4. Follow the instructions on the My Products tab to display and print the Details Sheet.

  North American partners should use the Sage Partner Portal:

  1. Log in to your account at https://partners.sagenorthamerica.com/irj/portal.
  2. Click Customers > Details Sheet.
  3. Click Show Advanced Search.
  4. Enter an account ID, and then click Go.
  5. On the Details Sheet, click the Products Details tab to view the customer's activation codes.

  Internationally, except in Africa, obtain activation codes from your regional Sage Office.

  In Africa, you should obtain activation codes from your regional Softline ACCPAC Office.

Review Documentation

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

- ❑ *Sage 300 ERP Release Notes*
- ❑ *Sage 300 ERP Installation and Administration Guide* (for new installations)
- ❑ *Sage 300 ERP Upgrade Guide* (when upgrading existing installations)

If you plan to use Sage CRM with Sage 300 ERP, read and understand the following documentation:

- ❑ *Sage CRM Release Notes*
- ❑ *Sage CRM Integration Guide*
- ❑ *Sage CRM Integration Upgrade Guide*

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Install and Configure Supporting Programs

- ❑ If you plan to customize reports and forms, install Crystal Reports on the computer that you will use to modify the reports and forms.
- ❑ If you plan to use Sage CRM with Sage 300 ERP, install and configure that program as described in the Sage CRM documentation.
- ❑ If you plan to use the Sage 300 ERP Portal, install and configure Windows' Internet Information Services as described in the chapter "*Configuring the Sage 300 ERP Portal"* in the *Installation and Administration Guide*.

Important Steps before Upgrading to this Version

- ❑ Make sure you have this version of all Sage 300 ERP programs.
- ❑ Perform the following tasks in your previous version of Sage 300 ERP:
  1. Run Day End Processing (if you use Inventory Control).
  2. Post any open batches in Accounts Receivable and Accounts Payable.
  3. Post any open G/L batches in General Ledger.
  4. Save customized reports, macros, and other customizations.
  5. Back up your company data. If you were using the Sage 300 ERP Portal with your earlier version, also back up your portal database.
- ❑ Uninstall the previous version of System Manager.