# Sage 300
Pre-installation Checklist

**Date:** **Completed by:**

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

## Review Hardware and Software Requirements

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

- For current information about minimum system requirements, see the *Compatibility Guide:*

  https://support.na.sage.com/selfservice/viewdocument.do?externalId=26777
- Confirm that the Sage 300 server meets the minimum system requirements.
- Confirm that each client workstation meets the minimum system requirements.
- Ensure that all your databases are in Microsoft SQL Server format.
- If you have databases in Pervasive or Oracle format, you must convert them to Microsoft SQL Server format. For more information, see the *Database Conversion Checklist.*
- 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 If you try to use a newer version of the software, or use software not listed in the *Compatibility Guide,* you may encounter technical difficulties.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 Programs

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

- Obtain a list of activation codes, as follows:
  - **North American customers should use the Sage Customer Portal.**

    Log in to your account at https://customers.sagenorthamerica.com/irj/portal/anonymous/login.

    If you need assistance, contact customer.portal@sage.com.

- **North American partners should use the Sage Partner Portal.**

  Log in to your account at https://partners.sagenorthamerica.com/irj/portal.

  If you need assistance, contact partners.portal@sage.com.

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

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

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

## 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, install and configure that program as described in the Sage CRM documentation.
- If you plan to use the Sage 300 Portal, install and configure Windows' Internet Information Services as described in the chapter "Configuring the Sage 300 Portal" in the *Installation and Administration Guide.*

## Important Steps before Upgrading to this Version

- Make sure you have this version of all Sage 300 programs.
- Perform the following tasks in your previous version of Sage 300:
  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 Portal with your earlier version, also back up your portal database.

- [ ] Uninstall the previous version of System Manager.