

Sage ERP Accpac Pre-installation Checklist

Completed by		Date
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Review this checklist, and then complete each step before you install Sage ERP Accpac.

Review Hardware and Software Requirements

Verify that the computer on which you plan to install Sage ERP Accpac, and each workstation that requires access to Sage ERP Accpac meets or exceeds the minimum system requirements.

- For current information about minimum system requirements, download the *Compatibility Guide* from the [Sage Customer Portal](#).
- Confirm that the Sage ERP Accpac server meets or exceeds the minimum system requirements.
- Confirm that each client workstation meets or exceeds the minimum system requirements.

Obtain Activation Codes for Sage ERP Accpac Programs

You can run Sage ERP Accpac with a temporary license for up to 30 days, but you must enter valid activation codes in the License Manager to use Sage ERP Accpac 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 ERP Accpac Readme*
- Sage ERP Accpac Installation Guide* (for new installations)
- Sage ERP Accpac Update Notice* (when upgrading existing installations)

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

- SageCRM Readme*
- SageCRM Integration Guide*
- SageCRM Integration Update Notice*

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 SageCRM with Sage ERP Accpac, install and configure that program as described in the SageCRM documentation.
- Install and configure Windows' Internet Information Services, as described in the Sage ERP Accpac *Update Notice*.

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Important Steps before Upgrading to this Version

- Make sure you have this version of all Sage ERP Accpac programs.
 - Perform the following tasks in your previous version of Sage ERP Accpac:
 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.
 - Uninstall the previous version of System Manager.
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