**#1: ERP Sync Tool Pre-Install Checklist (Sage 100)** v.2022-10-24i

Company Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# I. Purpose

The purpose of this document is to provide a list of the most critical items needed by CIMcloud to keep your project on track. It is a list of 1) the steps you need to take, and 2) the key information you need to provide CIMcloud to allow us to complete the installation of the ERP Sync tool (which moves data back and forth between your CIMcloud platform and your ERP system). Please complete all of these items within five (5) days of placing your order to avoid delays in your project schedule. Please fill in your answers below and highlight them in yellow.

# II. Summary of Steps To Take (To Allow CIMcloud to Install Our ERP Sync Tool)

This section provides a summary of the steps you need to take to allow CIMcloud to complete the install of our ERP Sync Tool (which moves data between CIMcloud and your ERP system).

1. Provide general information about your ERP System
2. Verify minimum system requirements are met (for the server your ERP is installed on)
3. Unblock the CIMcloud IP address (if outbound traffic Is being blocked)
4. Set up remote access to the server that is running the ERP system (so we can install the ERP Sync Tool)
5. Create a Sage 100 user logon that the CIMcloud ERP Sync Tool will use
6. [Sage 100 Premium Only] Create a local SQL Server login that the CIMcloud ERP Sync Tool will use

# III. Details of Steps To Take (To Allow CIMcloud to Install Our ERP Sync Tool)

## 1. Provide general information about your ERP System

* What version of Sage 100 is being used?
  + 2013 | 2014 | 2015 |2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022
* What Sage 100 database type is being used:
  + ProvideX
  + Microsoft SQL Server (Sage 100 Premium only)
* What is the Sage 100 company file(s) / code(s)?
  + \_\_\_\_\_\_\_\_\_\_\_\_ (primary)
  + \_\_\_\_\_\_\_\_\_\_\_\_ (alternates)
  + Note: The base CIMcloud package includes support for 1 ERP company file only. Syncing 2 or more ERP company files requires optional add-on bundles and additional services.

## 2. Verify minimum system requirements are met (for the server your ERP is installed on)

Are the below minimum requirements met? **( YES | NO )**

If no, please indicate which requirements are not met: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Minimum System Requirements:

* Windows 2012 R2 SP1 or greater
* Two Dual-core processors
* 2GB of RAM memory
* 5GB of hard disk space on the drive that holds Windows
  + Note: this is required for the Microsoft .NET 4.0 framework and swap space for XML files
* The CIMcloud ERP Sync Tool must be installed on the same server that is running the ERP system
* Microsoft SQL Server 2005 or greater
  + This only applies if you are using Sage 100 Premium
* Your ERP vendor may require a newer version of Windows or SQL Server than the versions above.
  + Sage’s Supported Platform Matrices, which includes Windows and SQL Server versions, can be found here: <https://support.na.sage.com/selfservice/viewdocument.do?externalId=47649>

## 3. Unblock the CIMcloud IP address (if outbound traffic is being blocked)

* The CIMcloud ERP Sync tool makes a secure outbound internet connected to the CIMcloud services to send and receive data being synced with your ERP system.
* Companies with firewalls, anti-virus software monitoring, or any other network configuration that blocks outside network connections will need to unblock any outbound traffic to **67.23.168.0/24** and make it take precedence over any URL filtering.

## 4. Set up remote access to the server that is running the ERP system (so we can install the ERP Sync Tool)

In order for CIMcloud to install the ERP Sync tool, we must have access to the server that is running your ERP system. Please choose one of the following options (and take the applicable actions).

**Option #1: Install the free CIMcloud remote support utility (powered by Go To Assist).**

* You must have administrator privileges on the server to install this utility.
* Companies with a firewall need to open TCP outbound connections on ports 80 and 443 for the ERP server.
* This utility will do the following two things:
  + #1 - It sets up a Windows user (with Username = “./wspremote”) so a CIMcloud deployment specialist can access the server to install the ERP Driver sync tool.
  + #2 - It installs the Go To Assist client which is the tool the CIMcloud deployment specialist will use to reach your server (and then login with the Windows user above).
  + **Security Note:** You will be notified when the install / deployment process is completed. At that time, to reduce your security risk, you should disable or remove both 1) the above Windows user, and 2) the Go To Assist client from your server.
* Step #1: Download and Install the Utility
  + Download the [utility executable file](https://download.erpdriver.com/Remote/wsp_remote_support.exe) from CIMcloud.
    - If you prefer, you may [download a .zip file](https://download.erpdriver.com/Remote/wsp_remote_support.zip) with the utility.
  + Open the *wsp\_remote\_support.exe* utility
  + Make sure both checkboxes are checked and click *install*
* Step #2: Collect & Enter your Computer Name
  + Note: Our deployment specialist will need your computer name to identify your device inside Go To Assist.
  + You will see a pop-up window with your computer name on completion.
    - Computer Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Step #3: Change the password for the Windows user that was created in Step #1 above (the username is .\wspremote)
  + Change the password to a strong, unique password and store it in a safe place
    - **Do NOT email the password to CIMcloud (in the body of the email or an attachment).**
    - A CIMcloud Customer Success Manager will collect this password from you on your kickoff call.
    - The CIMcloud deployment team may change this password from time to time.

**Option #2: Provide CIMcloud with your preferred method of remote access if you do not wish to use our tool.**

* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Do NOT email passwords of any kind to CIMcloud (in the body of the email or an attachment).**
* A CIMcloud Customer Success Manager will collect this password from you on your kickoff call.
* The CIMcloud deployment team may change this password from time to time.

## 5. Create a Sage 100 user logon that the CIMcloud ERP Sync Tool will use

* Username: *wsp*
* Password: *Set a strong, unique password and store it in a safe place*
  + **Do NOT email the password to CIMcloud (in the body of the email or an attachment).**
  + A CIMcloud Customer Success Manager will collect this password from you on your kickoff call.
  + The CIMcloud deployment team may change this password from time to time.
* Administrator role for the production company
* Administrator role for *all* companies (this is only applicable if you are running multiple company files and used just during the ERP Integration setup).

## 6. [Sage 100 Premium Only] Create a local SQL Server login that the CIMcloud ERP Sync Tool will use

**Sage 100 Premium Only**

Note: This section only applies if you are running Sage 100 Premium (which runs on a Microsoft SQL Server database instead of the ProvideX file system database). This creates a SQL user that CIMcloud’s ERP Driver Sync Tool will use to move data from your ERP system to the CIMcloud platform.

* Username: *WSPDataSync*
* Password: *Set a strong, unique password and store it in a safe place*
  + **Do NOT email the password to CIMcloud (in the body of the email or an attachment).**
  + A CIMcloud Customer Success Manager will collect this password from you on your kickoff call.
  + The CIMcloud deployment team may change this password from time to time.
* Set the following Login Properties on this (WSPDataSync) SQL server user:
  + Typically, you will set these properties by
    - Editing the user,
    - Then clicking on “User Mappings”,
    - Then checking “Map to Credential”,
    - Then clicking on “Add” to map this user to
      * i) the database file(s) it needs to access (see below), and
      * ii) database role memberships it will need (see below) on each database file
    - i) Map this user to these database files:
      * MAS\_System
      * MAS\_<production\_company\_db>
    - ii) Map this user to this database role membership:
      * db\_datareader
* Note: CIMcloud does not directly write data to or delete data from the Sage 100 SQL Server database (when syncing in orders, invoice payments, etc), which is why you do not need to provide it write or delete access.