

## PRE-INSTALLATION CHECKLIST FOR GUMU™ Salesforce Integration to Sage 100

Today's Date: \_\_\_\_\_

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

**\*Note: there are 3 sections within this checklist, which may require info from 3 different contacts.**

### SECTION 1 – REQUIRED INFORMATION FROM YOUR SALESFORCE ADMINISTRATOR

Ultimately, we will need user access to your Salesforce instance. However, in advance of creating a Salesforce user for us to use when configuring the integration, please be aware of the following:

- Create the username **gumu.#comp\_name#@greyrtix.com** (where #comp\_name# = your company name) with the email address **salesforce@greytrix.com** for the user in Salesforce OR you can provide us with one for an existing user (this user needs to have full Admin and Developer rights).
- Keep in mind whichever user we are assigned to configure the integration, that user will also be configured for scheduled imports. As a result, any new or existing records imported from Sage into Salesforce will display this user as the 'Last Modified By'. For example, if you give us a Salesforce user for 'Bob Smith' (with System Administrator rights), then you will see the 'Last Modified By' as Bob Smith. For this reason, we recommend assigning a user to us who does not actively create or update records.
- This integration does not consume a Salesforce user license.
- In a typical setup, we map Sage 100 Salesperson codes to Salesforce users. In the absence of a corresponding Salesforce user to a Sage 100 Salesperson code, the value that will display in Salesforce will be this Salesforce user that was created for the integration.
- When we install the integration, we will first do this on a Salesforce Sandbox instance. If you have created a sandbox for us already, please provide answers below, but if you have not yet done this and you want us to do this, we can.

1. What edition of Salesforce do you use?

Professional                      Enterprise                      Unlimited

2. Salesforce Access Credentials:

a. Production Username: \_\_\_\_\_

b. Production Password: \_\_\_\_\_

3. Salesforce Sandbox Credentials:

- a. Sandbox Username: \_\_\_\_\_
- b. Sandbox Password: \_\_\_\_\_
- c. Sandbox Security Token: \_\_\_\_\_
- d. No Sandbox, Please Create

4. Disabling MFA for the Greytrix team: To avoid the generation of verification code every time Greytrix logs in, please configure our IP to your Salesforce account by following these steps:

- a. Login to Production/Sandbox Salesforce Org.
- b. Go to Setup → Administration Setup → Security Controls → Network Access.
- c. Click on the 'New' button.
- d. Enter our IP address (**49.248.14.234**) in both the 'Start' and 'End' IP address fields.
- e. Save the record.

\*Here is a [60-second video covering the steps above](#). Please confirm this has been completed.

5. Customer Salesforce Contact: \_\_\_\_\_  
Email Address: \_\_\_\_\_ Phone: \_\_\_\_\_

## SECTION 2 - REQUIRED INFORMATION FROM SAGE 100 PARTNER

1. Sage 100 version number: \_\_\_\_\_ Product update date: \_\_\_\_\_

2. Sage 100 Edition: Standard      Advanced (SQL)      Advanced (ProvideX)      Premium

3. Sage 100 Home Directory Path:  
\_\_\_\_\_

4. Sage 100 Application login credentials to be used for the integration (**\*with admin rights**):

Username: \_\_\_\_\_ Password: \_\_\_\_\_

5. Sage 100 Company Code names to integrate with Salesforce:  
\_\_\_\_\_

6. Sage 100 TEST Company Code names to integrate with Salesforce Sandbox (if applicable):  
\_\_\_\_\_

7. Sage 100 Contact: \_\_\_\_\_

Email Address: \_\_\_\_\_ Phone: \_\_\_\_\_

### SECTION 3 - REQUIRED INFORMATION FROM IT TEAM

We require unattended remote access with Admin rights to the Sage 100 server that Sage 100 has been installed on. This can be via remote access, VPN, Team Viewer, Or LogMeIn.

**\*This is mandatory until installation is completed and client has gone live.**

1. Please provide the following credentials for remote access (RDP) and Admin level rights to the server(s) that Sage CRM will be installed on:

a. URL of VPN server if a VPN connection is required:

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b. VPN client type (preferably Cisco, SonicWall, Windows VPN/ L2TP/IPsec):

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c. VPN details:

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d. VPN Username: \_\_\_\_\_ VPN Password: \_\_\_\_\_

e. URL(s) or IP Address(es) of RDP server(s):

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f. RDP Username: \_\_\_\_\_ RDP Password: \_\_\_\_\_

2. Sage 100 Windows server name: \_\_\_\_\_

3. Install IIS on this server. Please confirm this has been completed.

4. We require a secure external URL for the accounting data.

a. To accomplish this, the IT team must set up an internet domain (or sub-domain) that directs to the specific port (443) on IIS to construct the WEBAPI URL for external access.

b. This external URL must be secured using a valid SSL Certificate obtained from a registered CA (such as Verisign or GoDaddy). **Note: Salesforce only supports secure external URLs that are provided and verified by a public Certificate Authority (CA).**

c. Please ensure that you acquire, download and apply both the SSL and CA certificate.

- d. Once Greytrix installs the WEBAPI module on IIS, the new URL will be constructed per this example:  
[https://www.yourdomainurl.com/Sage100WebAPI/api/v1/sage100/SAMLTD/AR\\_Customer](https://www.yourdomainurl.com/Sage100WebAPI/api/v1/sage100/SAMLTD/AR_Customer)
- e. We acknowledge that working with SSL certificates may be new territory for you. If you are unfamiliar with this task, please source an appropriate resource to assist you.

Please confirm this has been completed.

Please define your URL below:

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5. Configure SQL **\*This is not required if you do not use the Premium version of Sage 100.** N/A

- a. Create a SQL user with the same name as Sage 100 user (ensure same case)
- b. Bind the SQL user to the required MAS\_xxx company databases
- c. Assign the SQL user DB\_Reader rights (and DB Writer to write data to Sage 100 Premium) to the company databases

Example SQL script (assumes the MAS\_XXX database is selected):

```
EXEC sp_addrolemember N'db_datareader', N'WebApiUser'
```

6. In the network firewall, we require you to whitelist IP addresses for both Salesforce and Greytrix.

Here's a short video tutorial on how to do that: [IP Whitelisting Demo](#)

- a. [Salesforce IP Addresses and Domains to Allow](#)
- b. Greytrix's IP 49.248.14.234 Please confirm this has been completed.

7. IT Contact: \_\_\_\_\_

Email Address: \_\_\_\_\_ Phone: \_\_\_\_\_

**Please email these 3 completed sections to your My CRM Manager Project Manager**