Sage Accpac ERP
Pre-installation Checklist

	Date
Completed by	

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

Review Hardware and Software Requirements

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

❑ For current information about minimum system requirements, download the *Compatibility Guide* from the Sage Accpac Web site at: http://www.sageaccpac.com/products/systemrequirements.

❑ Confirm that the Sage Accpac ERP 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 Accpac Programs

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

❑ Obtain a list of activation codes from the Sage Accpac ERP Client and Partner Support Center.
  1. Log in to your account at http://support.accpac.com.
  2. On the Clients menu, click My Products And Services.
  3. Click Further Product Detail.
  4. To print the list of activation codes that appears, click Print Me.

Review Documentation

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

❑ *Readme*

❑ *Sage Accpac ERP Installation Guide* (for new installations)

❑ *Sage Accpac ERP Update Notice* (when upgrading existing installations)

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

❑ *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 Accpac ERP, install and configure that program as described in the SageCRM documentation.

Important Steps before Upgrading to this Version

❑ Make sure you have this version of all Sage Accpac ERP programs.

❑ Perform the following tasks in your earlier version of Sage Accpac:
  1. Post transactions in Project and Job Costing (if you are upgrading from version 5.3 or 5.4).
  2. Invoice any partially invoiced P/O receipts that included serialized or lotted items.
  3. Run Day End Processing (if you use Inventory Control).
  4. Post any open batches in Accounts Receivable and Accounts Payable.
  5. Post bank reconciliations, create a G/L batch in Bank Services, and clear the Bank Reconciliation Posting Journal. (The *Update Notice* contains additional important information about this task.)
  6. Post any open G/L batches in General Ledger.
  7. Deactivate any Sage Accpac Options (UniDevCo) products you used with the previous version.
  8. Back up your company data.
  9. Perform Database Dumps of IBM DB2 Data (if you used DB2 in the previous version).

❑ Uninstall the previous version of System Manager.