**(Drop in Teams Collaboration Space when complete)**

**Server and Environment Connection Information**

To help your Sage CRM project kick-off smoothly we require environment and connection details. The information listed below will need to be provided to the Azamba consultants for us to start your project. **Please have the person in charge of your server or IT professional fill out this form.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |   |   |  |   | **Details** *\*May be Yes/No.* |
|  |   |   |   |   |  |
|   | Sage Client ID |   |  |   |   |
| **SQL Server** |   |   |   |   |  |
|   | Name or IP Address |   |  |   |   |
|   | Operating System and SP |   |  |   |   |
|   | RAM |   |  |   |   |
|  | Mgmt Studio Installed on CRM Server? |  |  |  |  |
|   | Hard Disk Space Available |   |  |   |   |
|   | Version and SP of SQL Server |   |  |   |   |
|   | SA Password |   |  |   |   |
|   | Other Databases In Use |   |  |   |   |
|  | Other Applications on this Server |   |  |   |   |
| **CRM Server** |   |   |   |   |   |
|   | Name or IP Address |   |  |   |   |
|   | Operating System and SP |   |  |   |   |
|   | RAM |   |  |   |   |
|   | Hard Disk Space Available |   |  |   |   |
|   | IIS is Installed |   |  |   |   |
|   | Other Websites Hosted in IIS |   |  |   |   |
|   | Other Applications on this Server |   |  |   |   |
| **Security** |   |   |   |   |   |
|   | Domain Admin Rights for Azamba |   |  |   |   |
|   | External IP Address to Network |   |  |   |  |
|   | Windows Credentials for Azamba |   |  |   |  azamba / @z2200-4 |
|   | Domain Name |   |  |   |   |
|   | VPN Client Required |   |  |   |   |
|   | VPN Username and Password |   |  |   |  azamba / @z2200-4 |
|   | VPN Client Path for Download |   |  |   |   |
|   | RDP Access to SQL Server |   |  |   |   |
|   | RDP Access to CRM Server |   |  |   |   |
|   | Local Admin on SQL Server |   |  |   |   |
|   | Local Admin on CRM Server |   |  |   |   |
|   | Able to access FTP://azamba.com |   |  |   |   |
|   | Port 80 is Available (Yes/No) |   |  |   |   |
| **Setup** |   |   |   |   |
|   | Version of Microsoft Office |   |  |   |   |
|   | E-Mail Client |   |  |   |   |
|   | Outbound SMTP Server |   |  |   |   |
|  | SMTP Server Credentials |  |  |  |  |
| **Sage 100 ERP Integration** |   |
|   | Server Name |   |  |   |   |
|   | Install Directory |   |  |   |   |
|   | ProvideX or SQL |   |  |   |   |
|   | Admin Level User ID & Password |   |  |   |   |
|   | Company ID for Integration with CRM |   |  |   |   |
|   | Is Sage 100 Workstation Installed on CRM Server? (Required) |   |  |   |   |
|   | Reseller and/or Consultant |   |  |   |   |