**(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 |  |  |  |  |