Sage 200 CRM Upgrade Guide

Table of Contents

Introduction

About this guide

This is an upgrade guide for people who are upgrading from an earlier version of Sage CRM. This applies to both standalone and integrated versions of Sage CRM.

The instructions guide you through upgrading your existing installation of Sage CRM to Sage 200 CRM version 6.2a.

For installation instructions about installing a new copy of Sage 200 CRM, please refer to the Sage 200 CRM documentation.

Once you have followed this guide and upgraded your Sage 200 CRM you can then set up the link between Sage 200 CRM and your Sage 200 Accounts application.

- Users who previously had a standalone version:

  Read the *Sage 200 CRM Integration Configuration Guide* for instructions how to set up the integration between your Sage CRM and Sage 200 Accounts applications.

- Users upgrading from a previously integrated version of Sage 200 CRM

  Read the *Sage 200 Integration Upgrade Guide* for instructions on how to update the links between Sage 200 CRM and Sage 200 Accounts.

Required knowledge

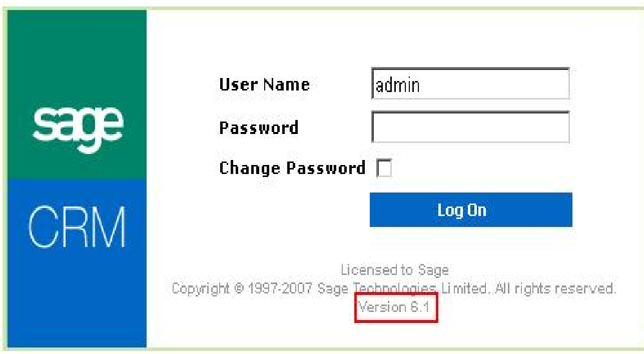
The Sage 200 CRM installation routine.

Pre-requisites

Sage 200 CRM 6.2 requires a new license key. Please ensure you have the new Sage 200 6.2 license key before proceeding.

Ensure that all of the updates and patches have been installed for your version of Sage CRM.

To check your version, load Sage 200 CRM or Sage CRM and note the version that you are using. This is displayed on the login screen. For example:



The upgrade process

It is not possible to upgrade directly to the Sage 200 CRM version 6.2 from all previous CRM versions. This guide explains which versions you will be required to upgrade to from any given starting version of CRM 5.8 or higher.

The route for upgrading is:

V5.8 > V6.0 > V6.0 service pack 1 > V6.2 > Service Pack 1

So, for example, if you have version 6.1 installed, you must install service pack 1, then version 6.2 and finally install the 6.2 service pack.

In order to upgrade you will require the installation CDs. Check the list below to see what installation CDs you will need to upgrade from your current version of Sage 200 CRM.

Note: You must use Sage 200 CRM CDs. You cannot use the Sage CRM CDs.

If you are using Sage 200 CRM 5.8

You need the following installation CDs:

Sage 200 CRM 6.0 SP1 CD

Sage 200 CRM 6.1 CD

Sage 200 CRM 6.2 CD

If you are using the Sage 200 CRM 6.0 without SP1

You need the following installation CDs:

Sage CRM 6.0 SP1 Patch

Sage 200 CRM 6.1 CD

Sage 200 CRM 6.2 CD

Note: You cannot use the Sage CRM CDs, except for the patch data. This patch data is located on the standard Sage CRM CD.

If you are using the Sage 200 CRM 6.0 with service pack 1 installed

You need the following installation CDs:

Sage 200 CRM 6.1 CD

Sage 200 CRM 6.2 CD

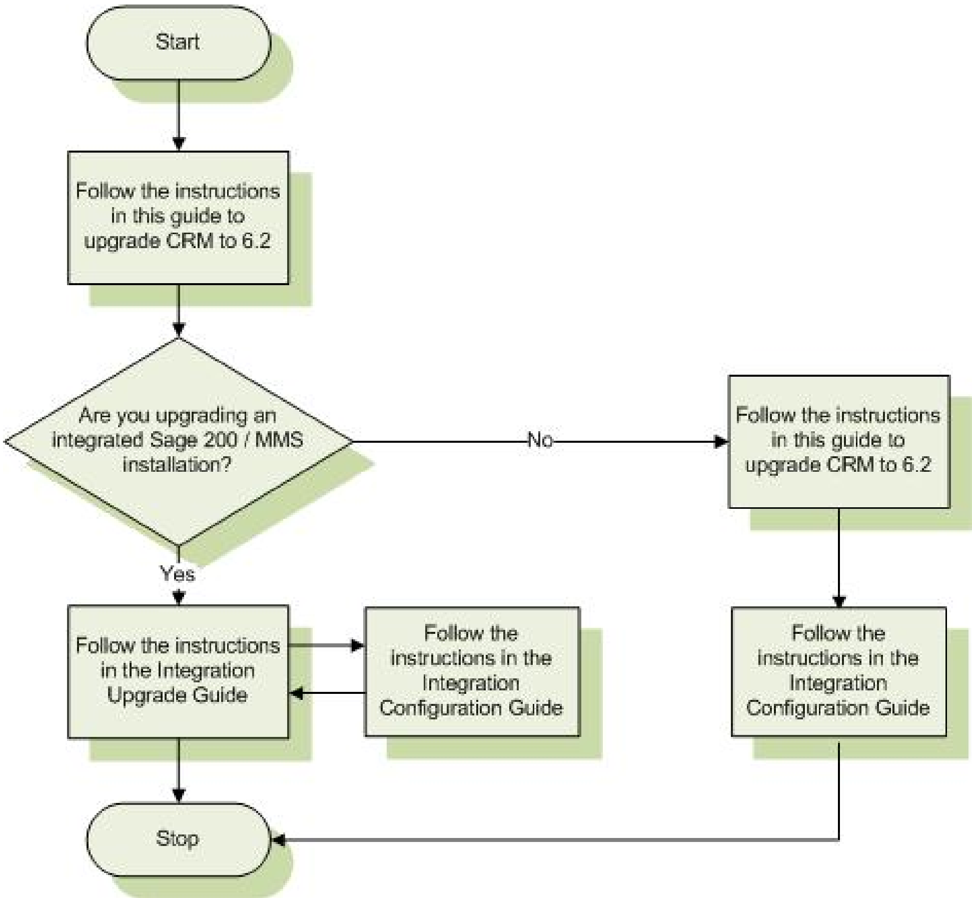
If you are currently running Sage 200 CRM 6.1

You need the following installation CDs:

Sage 200 CRM 6.2 CD

Upgrade flowchart

Use this flowchart to help you to decide what instructions you need to follow.



Backup your company databases

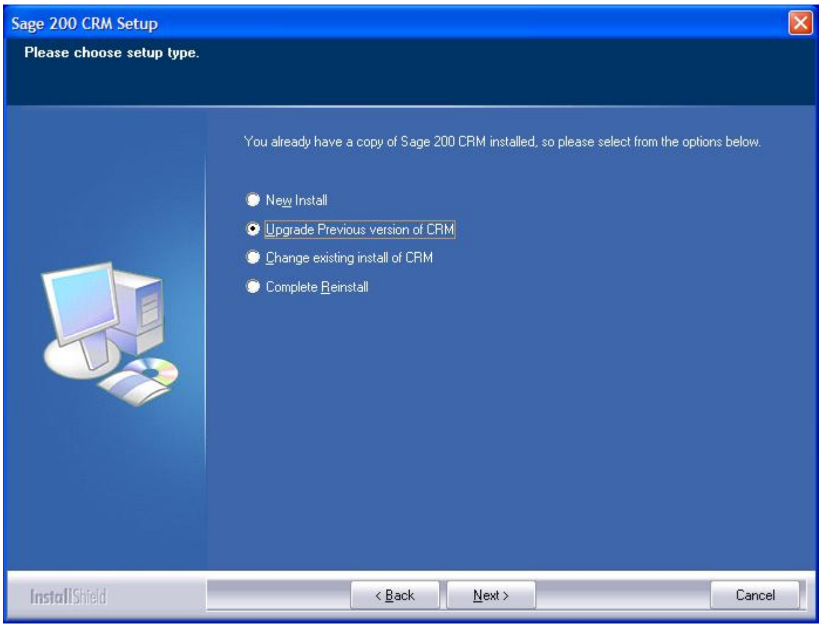
Before you upgrade you must ensure that you have a backup of both your Sage 200 accounts and Sage 200 CRM databases.
For information on how to backup databases please refer to your SQL server documentation.

Upgrading

Ensure that you have stopped AIS before upgrading. If you have to restart your PC during the upgrade process, AIS will also restart. If this happens you must stop AIS before continuing with the CRM upgrade.

Upgrading Sage 200 CRM from 5.8 to 6.0

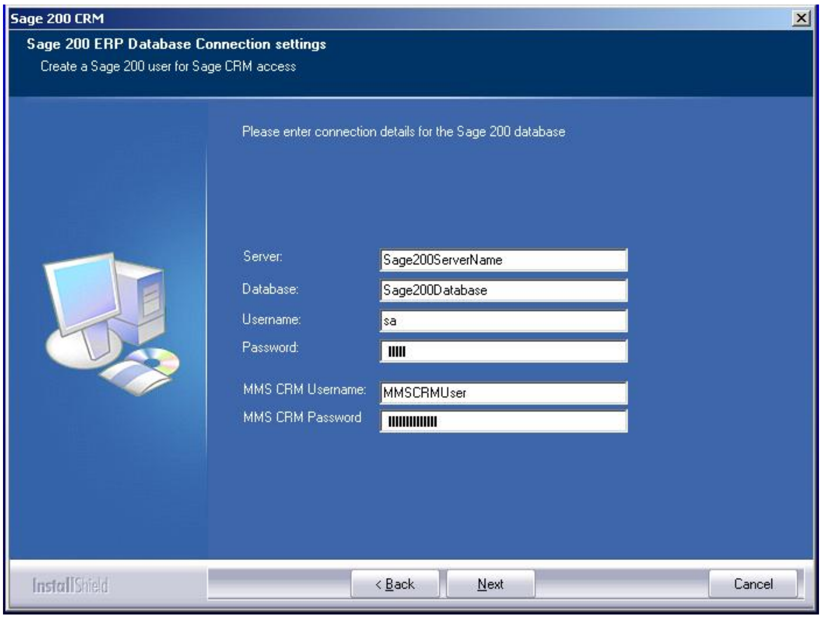
1. Stop AIS.
2. Install Sage 200 CRM 6.0 on the CRM Web Server.
3. When prompted to choose the setup type, select 'Upgrade Previous version of CRM'.



4. Follow the onscreen instructions.

   Note: Sage CRM accesses the Sage 200 company database using a specific SQL Server account. It is these details that are required here. When prompted to enter the connection details for the Sage 200 database, ensure that the details match those for the Sage 200 database for which integration is required.

   During the installation process the ERP Database Connection settings window appears.



In this window:

a. Enter the name of the SQL Server running Sage 200.

b. Enter the Database name of the Sage 200 Database.

c. Enter the Username and Password for the SQL Server accounts database user for CRM.
See *Create a Sage 200 Accounts database user for CRM in SQL Server* in the Creating Database Users guide towards the end of this document.

d. Enter the Username and Password of the Integration Services user that you set up in System Administrator.
See *Create an Integration Services user for Sage 200 Accounts* in the Creating Database Users Guide towards the end of this document.

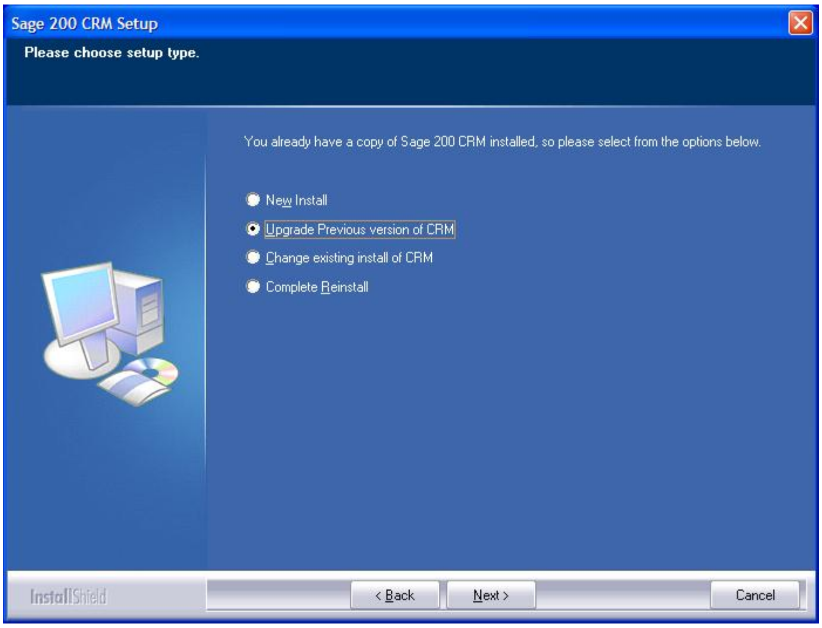
5. Follow the remaining onscreen instructions.
6. On the final screen, click the Finish button to close the installation routine.
7. Check the upgrade has been applied correctly by starting Sage 200 CRM and checking the version number on the login screen.

   When the installation is complete your CRM installation will be version 6.0 SP1.

Next you must upgrade from Sage 200 CRM 6.0 to Sage 200 CRM 6.1 SP1.

Upgrading Sage 200 CRM from 6.0 to Sage 200 CRM 6.1 SP1

1. Stop AIS.
2. Install Sage 200 CRM 6.1 SP1 on your CRM Web Server.
3. When prompted to choose the setup type, select ‘Upgrade Previous version of CRM’.

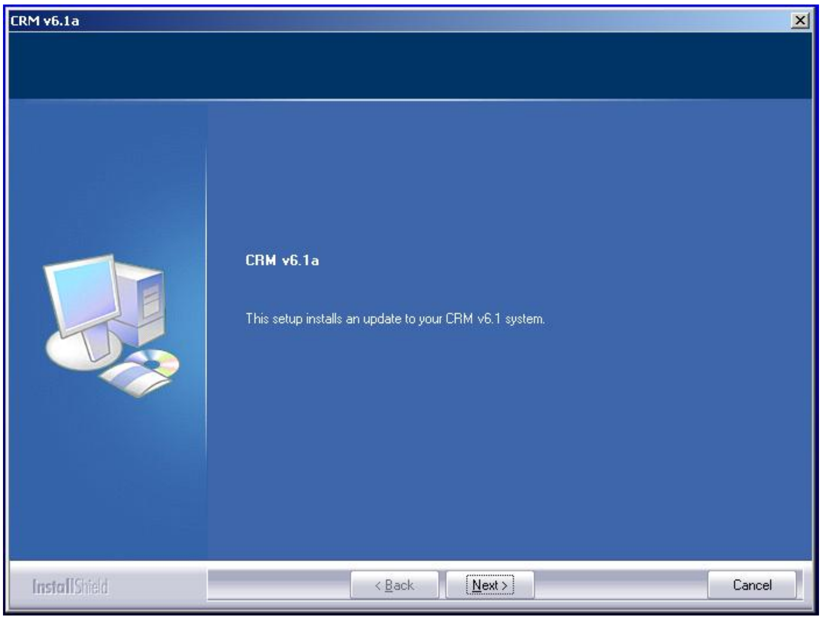


When the installation is complete your CRM installation will be version 6.1 SP1.

Next, follow the procedure ‘Upgrading Sage 200 CRM 6.1 SP1 to Sage 200 CRM 6.2’. This will give you instructions on how to upgrade to Sage 200 CRM.

Upgrading Sage 200 from CRM 6.1 (without SP1) to Sage 200 CRM 6.1 SP1

1. Stop AIS
2. On the CRM Web Server, install Sage 200 CRM 6.1 SP1.
3. Follow the onscreen instructions.

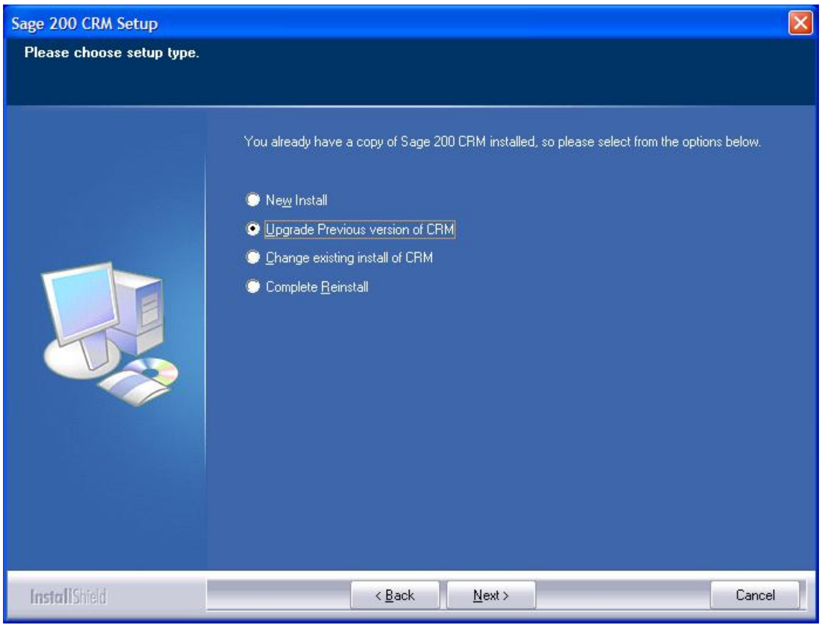


When the installation is complete your CRM installation will be version 6.1 SP1.

You can now follow the procedure 'Upgrading Sage 200 CRM 6.1 SP1 to Sage 200 CRM 6.2'. This will give you instructions on how to upgrade to Sage 200 CRM.

Upgrading from Sage 200 CRM 6.1 SP1 to Sage 200 CRM 6.2

1. Stop AIS.
2. On the CRM Web Server install Sage 200 CRM 6.2.
3. Click on the Setup.exe file on your CD.
4. Follow the onscreen instructions.
5. When prompted to choose the setup type, select 'Upgrade Previous version of CRM'.



6. When prompted, enter your Sage CRM details and click Next.
   When the installation is complete your CRM installation will be version 6.2.

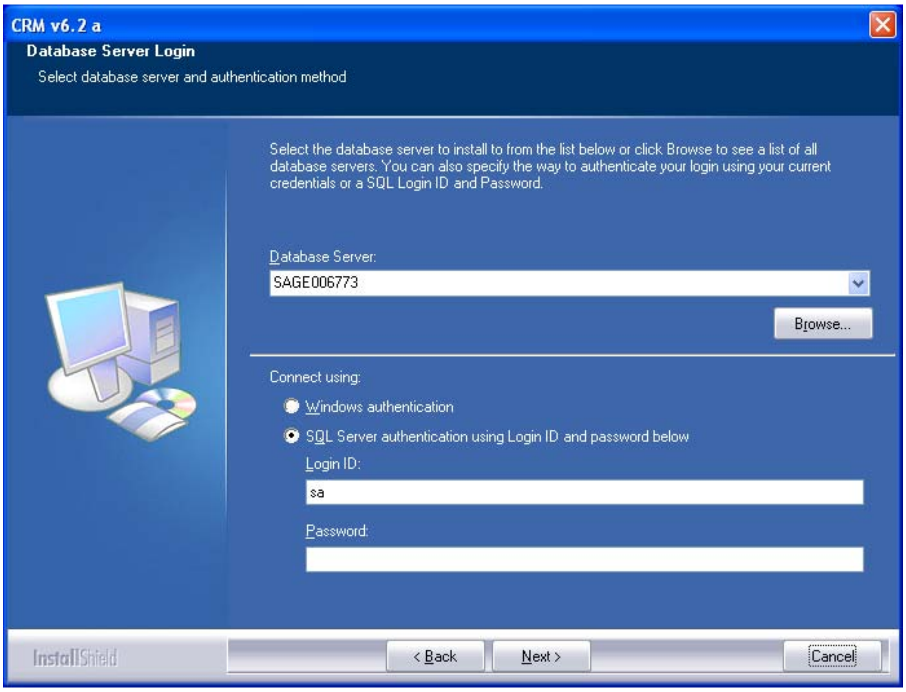
Next, you must install the service pack.

Installing Sage 200 CRM Service Pack A

Installing the service pack ensures that you are using the latest version of Sage 200 CRM.

Double-click on the CRMv62a.exe file on the CD to start the installation.

Follow the onscreen instructions, entering any relevant information and then clicking Next to move to the next page.



When the Database Server Login screen is displayed, enter your database information. This allows you to connect to SQL Server.

When you have entered all of the information, click Finish to save the details.

Once the installation is complete, the Sage 200 CRM version will show 6.2a on the logon screen.

If you are upgrading from a previously integrated version of Sage 200 CRM you must now run the Sage 200 System Administrator migration tool. This updates all of the user and role information that was set up previously.

For more information about Sage 200 System Administrator, please see the System Administrator help system.

Preparing Sage 200 CRM 6.2 for integration (first time integration only)

Important Note: This procedure should only be carried out by users who are integrating Sage CRM and Sage 200 Accounts for the first time.

If you have upgraded from a previously integrated version of Sage 200 CRM, you do not need to complete this step. Please read the *Sage 200 CRM Integration Upgrade Guide* for instructions on how to update the link between Sage 200 CRM and Sage 200 Accounts.

By this point, you should have an upgraded version of Sage 200 CRM (version 6.2a), and have an upgraded version of Sage 200 Accounts (v2009).

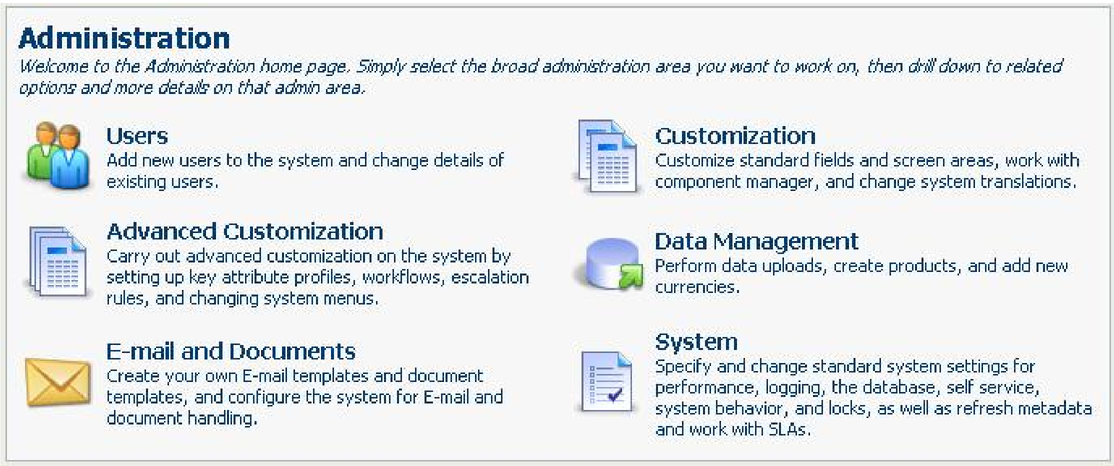
You must now set up a new integration in Sage CRM

An existing Sage CRM 6.2 installation does not have all the files and settings required to setup and enable the integration. The required files and settings have been packaged as a ‘customization’. You must import this information now.

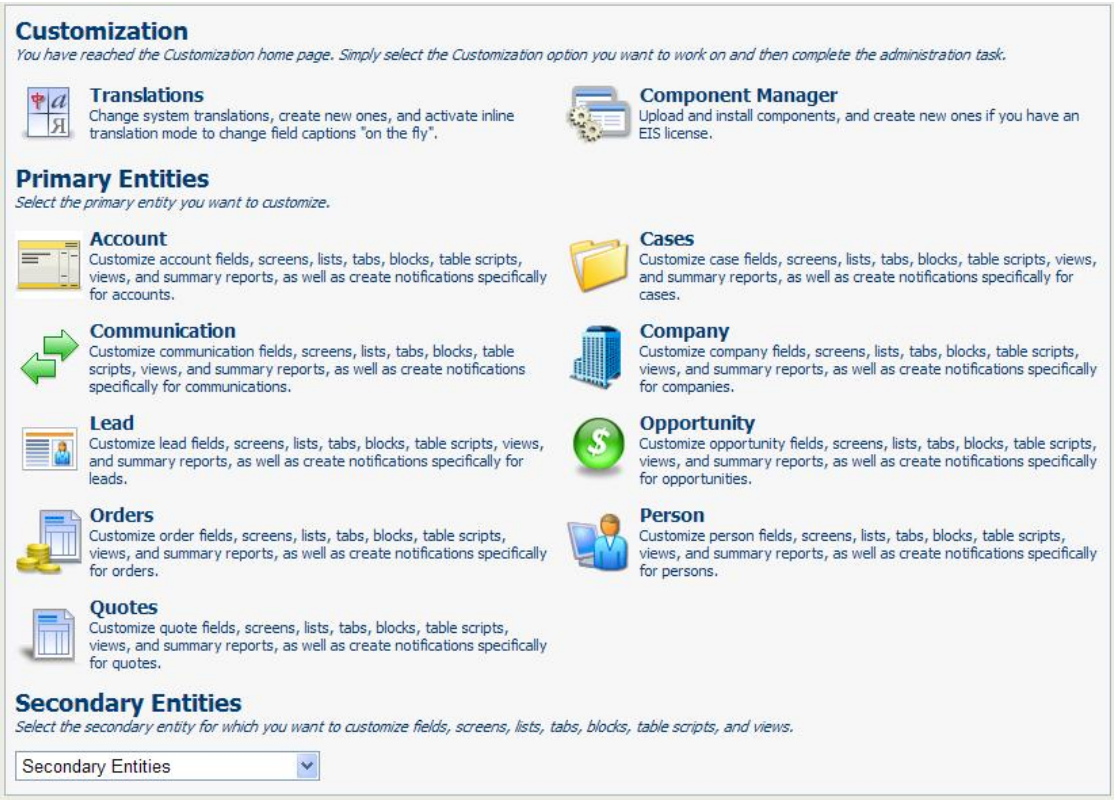
Import integration component

1. Open and logon to Sage 200 CRM as the system administrator.
2. Select 

and the Administration screen is displayed:

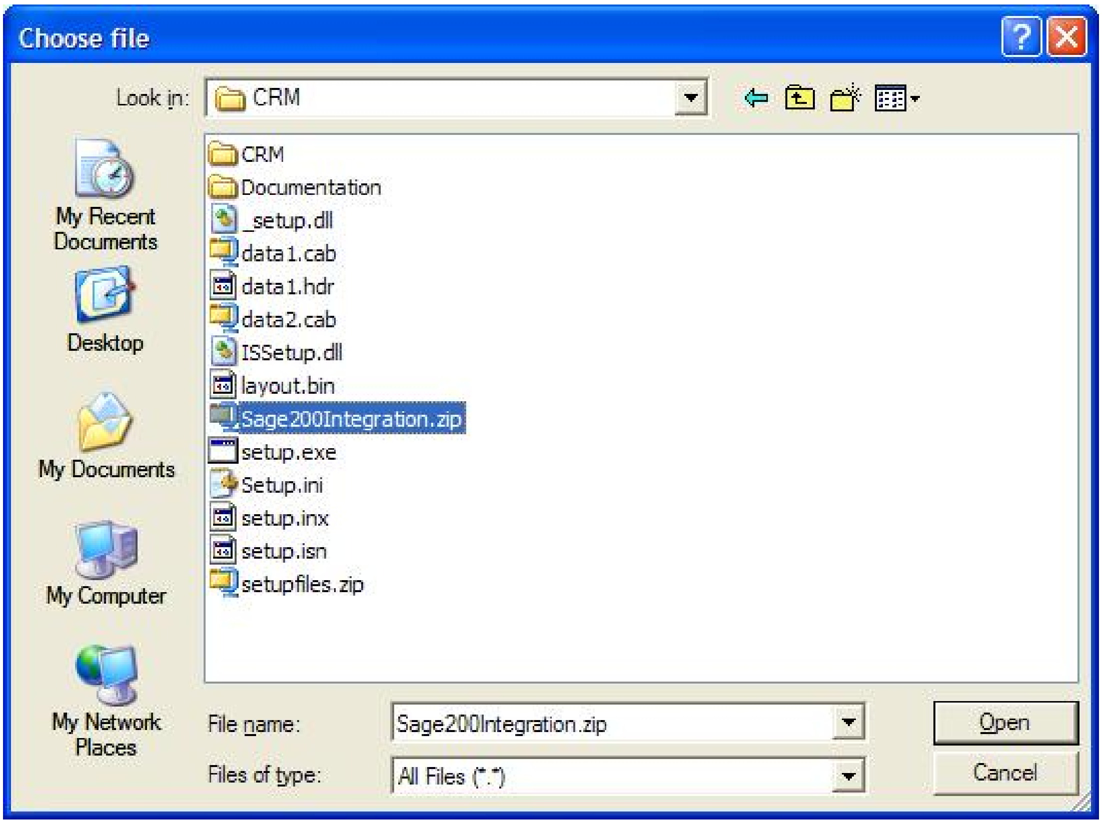


3. Select the Customization option and the customisation screen is displayed:



4. Select Component Manager and a screen is displayed showing any components installed:

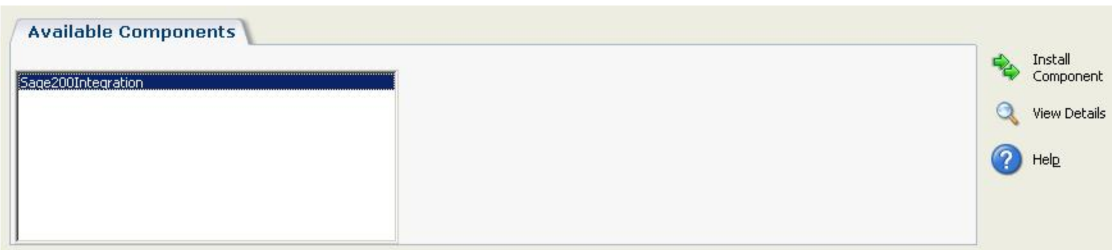
5. Ensure the Sage 200 CRM 6.2 CD is in your CD drive.
6. Select the Browse button and browse to the CRM folder.



7. Select the file called Sage200Integration.zip and click Open. The filename and path are now displayed in the 'Add Component' screen:

8. Select 

   After the component has been uploaded it will appear in the list of components available for installation:



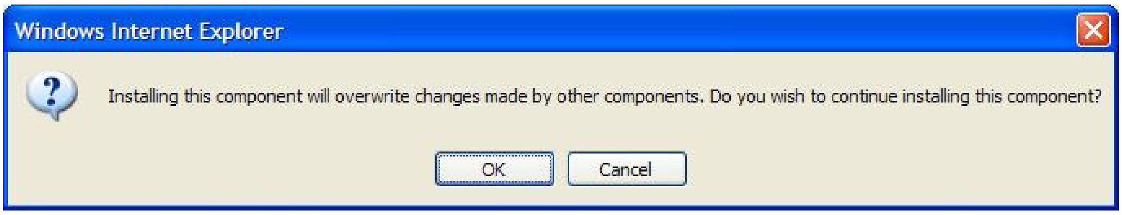
9. Select the Sage 200Integration component. It becomes highlighted and then click the 

 button.

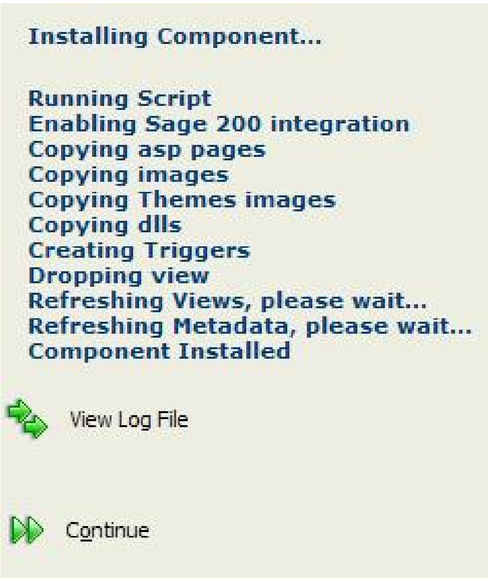
   The Component Parameters screen appears:

10. Ensure the 'Apply all changes' setting is Yes and click the Install Component button.

    The following warning appears:



11. Click 'OK' to continue to install the components. Once complete the following confirmation screen is displayed:



12. Click the Continue button. The integration installation is now complete.

    The Integration button is then displayed in the Administrator toolbar.

Enabling the integration

Enabling integration in standalone systems

Please refer to the Sage 200 CRM Upgrade Guide for existing stand alone CRM installations.

Enabling integration in previously integrated systems

Please refer to the Sage 200 CRM Integration Upgrade Guide.

Creating Database Users

Create a Sage 200 Accounts database user for CRM in SQL Server

Sage 200 CRM accesses the Sage 200 Accounts database using a specified database user and password.

If no suitable user exists, one must be created in advance using MS SQL Server Enterprise Manager.

The new user must have the option 'User must change password at next login' unchecked. If this option is checked, you will be unable to access SQL Server from Sage CRM.

The user must have at least DATA_READER permissions for the Sage 200 Accounts database.

This user information is stored as part of the database.

Note: After creating the user details, we recommend that you take a backup of the updated database.

Create an Integration Services user for Sage 200 Accounts

The Sage 200 Integration Services accesses Sage 200 Accounts using a specified Sage 200 Accounts username and password. If no suitable user details exist, they must be created using the Sage 200 System Administrator module.

To create a new user

1. Click Start > Programs > Sage Tools > Sage 200 > System Administration.
2. Right click Users and select ‘Add New User’ and the Add new user form is displayed.
3. Enter a unique 'Username'.
4. Enter a password.
5. Confirm the password by retyping it.
6. Click the OK button and the ‘Added User Properties’ form is displayed.
7. Ensure that ‘User Enabled’ is ticked.
8. Select the ‘Member of’ tab and select the roles available to this user.
9. Select the ‘Company Access’ tab and select the companies this user can access.
10. Click the OK button to save your changes.
11. For more information on Users, company access and roles, please refer to the Sage 200 System Administrator guide.
12. For more information on roles and setting up remote users please refer to the Integration Configuration guide.

Upgrading Sage 200 CRM Checklist

Here is a checklist for upgrading an existing standalone CRM integration.

- ☐ Upgrade Sage 200 CRM to version 6.2 applying any intermediate versions as required. Use the flowchart in this guide to decide which versions to install.
- ☐ Import the Sage200Integration component using Component Manager.
- ☐ If the existing system used the Sage 200 Integration Server then please refer to the Sage 200 CRM Integration Upgrade Guide for details of what to do next.
- ☐ If the existing CRM system was standalone, refer to the Sage 200 CRM Upgrade Guide for details of what to do next.