

# **Installation Guide**

## GUMU<sup>™</sup> FOR SAGE CRM – SAGE INTACCT INTEGRATION







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### **Chapter 1: Pre-requisites**

#### **Pre – Requisites for installing GUMU<sup>™</sup> (New Installation)**

#### 1. Operating System Requirements

GUMU<sup>™</sup> setup should be installed on a Windows system, where Sage CRM can be installed. However following versions of Operating systems are preferred or as supported by Sage CRM.

- Windows Server 2003
- Windows Server 2008
- Windows 8
- Windows 8.1
- Windows Server 2008 (R2)
- Windows Server 2012 (R2)
- **Browser Supports the latest version of Google Chrome and Internet Explorer.**

#### 2. Version Compatibility

GUMU<sup>™</sup> for Sage CRM – Sage Intacct integration is currently compatible and tested with following versions of Sage CRM.

• Sage CRM (Version 2017 R1/R2/R3, 2018 R1/R2/R3)

**Note:** If you have Sage CRM versions other than mentioned above, you can contact us at <a href="mailto:sage@greytrix.com">sage@greytrix.com</a>

#### 3. Pre-requisites

- 1. Please make sure that Sage Intacct URL is accessible from Sage CRM server.
- 2. Backup of Complete Sage CRM:-Take a backup of Sage CRM database and complete Sage CRM installation directory.
- 3. Configure IIS:
  - a. For Configuring IIS versions before 6.0.
  - Select Start | Settings | Control Panel | Administrative Tools | Internet Information Services IIS Manager.
  - Click on Web Services Extensions folder, you will see a list on the left-hand side. When you
    initially install IIS, the services installed are in a highly secure and "locked" mode. By default,
    IIS serves only static content meaning features like ASP, ASP.NET, Server-Side and FrontPage
    Server Extension do not work unless enabled. If you do not enable this functionality after
    installing IIS, IIS returns a 404 error. Refer the below image.







Internet Information Services	📁 Web Service Extensions		
🗄 🃁 Application Pools		✓ Web Service Extension	Status
🕀 🍎 Web Sites		All Unknown CGI Extensions	Prohibited
🗄 🃁 Web Service Extensions	Allow	M Unknown ISAPI Extensions	Allowed
		Notive Server Pages	Allowed
	Pronibit	SP.NET v1.1.4322	Allowed
	Properties	SP.NET v2.0.50727	Allowed
		😼 CRM	Allowed
		🔊 Internet Data Connector	Prohibited
	Tasks	Server Side Includes	Prohibited
		WebDAV	Prohibited
	Add a new Web service extension		

- Select all unknown ISAPI Extensions from the Web Services Column and select the allow button.
- Also, select the Active Server Pages and click the allow button.
  - Enable parent paths
  - Select Start | Control Panel | Administrative Tools | Internet Information Services IIS Manager.
  - In IIS Manager, Go to default Web site properties by simply click the right mouse button and click Properties.
  - In Default Website properties window, click on "Home Directory" tab.
  - In "Home Directory" tab click on "Configuration" button.
  - In Configuration screen, click on Options tab and set the Enable Parent Path option to check. Refer below image.

Mappings Options	Debugging   Cache Options   Process Options	1
Application Confi Enable gessi Session time Enable buffe	figuration ion state eout: 20 minutes ering nit paths	
Default ASP Jang ASP Script timeo	guage: VBScript out: 90 seconds	

- b. Configure IIS version 6 or above
- Select Start | Control Panel | Administrative Tools | Internet Information Services IIS Manager.
- Click on to the Internet Information Service Manager (IIS) Manager | Server (Server\Administrator) | ISAPI and CGI Restrictions.









 Click on ISAPI and CGI Restrictions, allow access to Active Server pages, and Allow unspecified ISAPI modules. When you initially install IIS, the service is installed in a highly secure and "locked" mode. By default, IIS serves only static content meaning features like ASP, ASP.NET, Server-Side and FrontPage Server Extension do not work unless enabled. If you do not enable this functionality after installing IIS, IIS returns a 404 error. Refer the below image.

Internet Information Services (I	IIS) Manager				_ 🗆 🗵
🚱 💿  🎙 🕨 SERVER 🕨					🖸 🖾 🖾 🕐 🔹
File View Help					
Connections		trictions		A	ctions
🔍- 🕞 🖄 😥		unctions			Add
Start Page	Use this feature to specify the ISAPI and	CGI extensions that can	un on the Web server.		Edit Feature Settings
Application Pools	Group by: No Grouping -			16	) Help
FIP Sites	Description A	Restriction	Path		Online Help
H. O. Sites	Active Server Pages	Allowed	%windir%\system32\inetsrv\asp.dll		
	ASP.NET v2.0.50727	Allowed	%windir%\Microsoft.NET\Framework(v2.0.50727\ast		
	Sage CRM	Allowed	C:\Program Files\Sage\CRM\CRM71PRO77\WWWRoc		
	Sage CRM	Allowed	C:\Program Files\Sage\CRM(CRM71\WWWRoot\eWar		
	Edit ISAPI an	d CGI Restrictions Set	ings ? X		
	C Allow uns	pecified CGI modules			
	Allow uns	pecified ISAPI modules			
		OK	Cancel		

- Enable parent path
  - Select Start | Control Panel | Administrative Tools | Internet Information Services IIS Manager. You can even do this by clicking your Windows Start button and entering **"inetmgr"** into the search box. Then press enter.
  - On the Connections pane, expand the server node and select your site from underneath "Sites."
  - On the Features view, double-click "ASP."
  - Change "Enable Parent Paths" to "True."
  - Under the Actions pane, click "Apply."







Internet Information Services (IIS)	lanager		
SERVER ►			🖬 🖂 🚹 I 🕢 🗝
File View Help			
Pie Verw Help Connections Start Page Paper Starts Page Starts Starts Starts Default Web Site	ASP Display: Friendly Names Display: Friendly Names Display: Friendly Names Display: Friendly Names Display: Friendly Names Display: Display:	0 True True True 0 True VESript	Actions Actions Concel Property Acepton Rep Online Help
	Enable Parent Paths Specifies whether an ASP page allows above the current directory.	paths relative to the current directory (using the $\ldots$ notation) or	
	Features View 🛵 Content View		
Configuration: 'localhost' applicationHost.confi	2		۹







## Chapter 2: GUMU<sup>™</sup> Setup Installation

#### Installing GUMU<sup>™</sup> Integration setup on Sage CRM server

- 1. Download the GUMU<sup>™</sup> integration setup from our website.
- 2. This setup has to be installed on the Sage CRM server.
- 3. Please login to Sage CRM server as a Domain Administrator.
- Click on the GUMU<sup>™</sup> Integration setup and run the setup with "Run as Administrator" option on Sage CRM server.

Name		Date modified	Туре	Size
SUMU For Sage CRM -	Sage Intacct.exe	11-04-2018.09:56	Application	77.590.KB
	Open Browse with .	NET Reflector		
	🚱 Run as admin	nistrator		
	Troubleshoot Pin to Start	compatibility		
	Scan with Sys	tem Center Endpoint P	rotection	
	🗎 Add to archiv	'e		
	Add to "GUM	U For Sage CRM - Sage	Intacct.rar"	
	Compress and	d email		
	Compress to	"GUMU For Sage CRM	- Sage Intacct.rar" a	nd email
	Pin to Taskba	r		

5. Setup will be launch. Click on the **NEXT** button to proceed further.









6. Click on 'Next' button to accept the terms in License Agreement.







7. Select the Sage CRM Instance name from the list of available Sage CRM instances. Kindly enter correct system admin level Sage CRM username and password along with Domain Administrator level Windows user and password. Click **NEXT**.

Sage CRM Instance	
Select Sage CRM instance	
Select the Sage CRM instance, to install	GUMU™ Integration on.
Select Sage CRM Instance:	CRM2018R1 ¥
Sage CRM User:	admin
Sage CRM User Password:	
Sage CRM Windows Server Administrate	or User Detail For Impersonation:
Sage CRM Windows Server Administrate Windows Domain Name:	or User Detail For Impersonation: Domain Name
Sage CRM Windows Server Administrate Windows Domain Name: Windows Domain User:	or User Detail For Impersonation: Domain Name Windows User
Sage CRM Windows Server Administrate Windows Domain Name: Windows Domain User: Windows Domain Password:	or User Detail For Impersonation: Domain Name Windows User
Sage CRM Windows Server Administrato Windows Domain Name: Windows Domain User: Windows Domain Password: Greytrix India Pvt Ltd	or User Detail For Impersonation: Domain Name Windows User

8. Enter the Sage CRM SQL Server Instance name, Sage CRM SQL Database Name and Sage CRM SQL Server Credentials. Also, browse the path where you want to keep Sage CRM database backup. This will take the backup of your Sage CRM Database at the specified location.





<mark>⊌</mark> GUMU™	For Sage CRM - Sage Intacct Integration Setup
Sage CRM SQL Se Provide Sage CRM	rver Database 1 SQL Server Database information for Connection
Server Name:	GREY085\SQLEXPRESS
Database Name:	CRM2018R1
SQL Server Login	Details
Username:	sa
Password:	•••••
CRM Database Ba	ickup Path:
C:\SQL Backup\	Browse
Greytrix India Pvt Ltd	< Back Next > Cancel

9. Enter the Sage Intacct ccredentials (Case Sensitive) along with Sage Intacct Company Name. Click 'Next' to proceed further.



## NON ARTIFICIAL INTELLIGENCE



For Sage CRM - Sage Intacct Integration Setup	×
nection Details acct Connection Information	102
https://api.intacct.com/ia/xml/xmlgw.phtml	
ERP User Name	
•••••	
TEST	
	Income
	For Sage CRM - Sage Intacct Integration Setup         nection Details         acct Connection Information         https://api.intacct.com/ia/xml/xmlgw.phtml         ERP User Name         ••••••         TEST

During the installation, IIS needs to restart. Click on '**Next'** button to proceed with IIS reset part and it will start automatically once installation gets finished.





1	GUMU™ For Sage CRM - Sage Intacct Integration Setup
Inte	ernet Information Services (IIS) Restart
	IIS needs be stop on your system. It will start automatically once installation gets finished.
Greytri	ix India Pvt Ltd < Back Next > Cancel







Now, the GUMU<sup>™</sup> Integration is ready to get installed on the Sage CRM Server. Please verify all the details you entered and Click on '**Install'** to start the installation.

Please note that it will also install components in Sage CRM which will create fields and scripts require for GUMU to work.

Ready to Install			1
The Setup Wizard Intacct Integration	d is ready to begin ins on.	stallation of GUMU™ For Sag	ge CRM - Sage
Below is the insta change any of yo	llation Summary. Clic our installation setting	k on "Back" button if you w s. Click "Install" to begin wit	ant to review or th the installation.
Installtion Summa	гу		
CRM Inst Name:	CRM2018R1	CRM SQL Server:	GREY085\SQLEXPRE
CRM DB Name:	CRM2018R1	CRM SQL Username:	sa
Sage Intacct Company:	GreytrixMPP-DEV		
ERP user ID	Guest		
CRM DB Bkup at:	C:\SQL Backup\CRN	12018R1_4_11_2018 11_35	5_48 AM.bak
evtrix India Pvt Ltd			
-,		< Back Ir	nstall Cance





- Sage Intacct Integration	-107
M - Sage Intacct Integration is being ir ninutes.	istalled on
< Back Next >	Cancel
	M - Sage Intacct Integration is being in minutes.











Click on 'Finish' to exit the Setup wizard.



**Note:** - Please note that this setup will install the Trial version of GUMU<sup>™</sup> Sage CRM – Sage Intacct integration. You will have to contact to Greytrix to get the license key for the complete version of integration.

For Configuring GUMU<sup>™</sup> from Sage CRM, kindly refer User Guide.





## **Chapter 3: Webservice User Authorization Setting**

Our GUMU<sup>™</sup> Integration use Webservice User ID for accessing Sage Intacct data which is a pre-requisite for GUMU<sup>™</sup> Integration. For this every Sage Intacct company will have to add Greytrix Webservice User ID i.e. **GreytrixMPP** in Sage Intacct, kindly follow below steps -

1. Go to Company > Company Info > Security tab, then click Edit. Refer below screenshot,

î	Dashboards	Reports	Company	General Ledger	Platform Services	Order Entry	User Defined Dimension	Accounts Payable	Accounts Receivable	Inventory Control	۲	*
С	ompany info	ormation							(	Edit Done N	lore Actio	MS 7
	General informatio	Security	Accounting	Schedules								

2. In the Web Services authorizations section, click the + icon above the top-right corner of the table. Refer below screenshot,

- 1	Web Services au	thorizations			
		DECONTION	CTATIK		•
	SENDER ID	DESCRIPTION	STATUS		
1	ajax	Automatically added based on historical Web Services activity	Active	0	ñ
2	GreytrixMPP	Automatically added based on historical Web Services activity	Active	0	â
3	intacct_tstools	Automatically added based on historical Web Services activity	Active	0	ð
4	sfdc_prod_v2	Automatically added for use by the Advanced CRM Integration subscription	Active	0	Ť
5	silverware	Automatically added based on historical Web Services activity	Active	0	1

#### 3. On the Web Services Sender Information pop-up, enter a Sender ID as GreytrixMPP.

**Note** - Sender IDs are case sensitive and cannot be changed after the authorization is added.

- 4. Optionally, add a Description for the sender.
- 5. Make sure the status is set to Active. Inactive sender IDs aren't able to make Web Services requests to your company.
- 6. Click Save.

Once Webservice User is authorized, the user can now access Sage Intacct Company data which can use for GUMU<sup>™</sup> Integration.

