



What You Need to Know

- **Important information regarding your Sage CRM Onboarding and Installation from our OnTrack team**

BACKUPS and PROTECTION

Although Azamba sets up your CRM and configures it, it is your organization's responsibility to conduct backups. You should let your IT person know that CRM is a web-based application – the following two main areas need to be backed up:

1. SQL Database to a .bak file
2. A complete copy of the Windows CRM directory

Please contact Azamba if your IT person is unsure of the location of these two items. We also recommend that the backups are spun off local on the current machine, and then that local backup is copied to your cloud or tape storage. This provides redundancy and easy access.

EXPOSING CRM TO THE WWW

Most organizations using Sage CRM choose to expose their CRM instance to the world wide web. Azamba does not perform this action as it involves server security and network configuration. We recommend making sure that your password policy in CRM is enabled prior to exposing CRM to the web. Contact your CRM account manager with any questions.

An example scenario of exposing CRM to the WWW is: Setting up an A record in DNS to point to `crm.yourcompany.com`. Going into your existing firewall and creating a one-to-one NAT rule to point to the CRM server on the HTTP/HTTPS port. You can test the configuration by going to `crm.yourcompany.com/crm`

*If any changes are being made to IIS, make an IIS explicit backup prior to doing so. Any problems with the CRM site caused by internal IIS changes may result in a Change Order and can cause serious down time.

*Contact Azamba if you choose to use HTTPS.



UPGRADES and UPDATES TO SAGE 100/300/SAGE PRO ERP/X3

Please contact Azamba as soon as you start to plan any ERP upgrade. CRM works in lock step w the ERP and is version dependent. Performing any upgrade without contacting Azamba can result in a non-functioning CRM, data loss (permanent), and data integrity issues. It can also be costlier to try and resolve the issues after the fact, than with pre-planning. We are happy to work closely w your ERP partners during planning so that everyone is on the same page.

SETTING UP YOUR SERVER

It is best to have the Sage CRM application on its own server and not the ERP server or a server with other internal files and software for your organization. Having CRM independent of other applications will ensure better performance and safer execution when exposing CRM to the world wide web. It will also be a benefit when a restart is necessary, or when work is being done – as not to disturb your organization. The SQL database for Sage CRM can reside on a local instance of SQL (on the same server as the CRM application) OR it may exist on an entirely different server. Please keep in mind that Sage CRM relies heavily on SQL and it is very important to have ample memory and as few databases as possible sharing that memory. Any questions? Ask our team.