

## Sage 100 Version 2014 Upgrade Checklist

### **System/Network Information:**

Please provide as much of the following information as possible: *(BCSProsoft can assist with any questions you might have).*

Upgrade to be performed: ☐ On site ☐ Remote

Server Operating System: ☐ Windows 2012 Server ☐ Windows 2008 Server ☐ Windows 2003 Server

Server Processor Speed: \_\_\_\_\_ (2.4 GHz or faster recommended)

Server RAM: \_\_\_\_\_ GB (2GB RAM minimum recommended)

**\*Failure to meet the minimum recommendations could result in slow MAS90/200 Performance.**

Amount of Data for MAS90 Folder: \_\_\_\_\_ GB

**To determine the space currently taken up by MAS90/200 data, launch Windows Explorer and find the drive where MAS 90/200 is currently loaded. Right click on the MAS90 folder and select Properties. Note size in MB or GB.**

Network Speed: ☐ 10MB ☐ 100MB ☐ 1GB (100MB or faster recommended for best performance)

Workstation Operating System: ☐ Windows 8 ☐ Windows 7 ☐ Windows XP Pro ☐ Windows Vista  
(select all that apply)

How many workstations will need to be set up for MAS 90/200? \_\_\_\_\_

Do you have any remote locations? ☐ Yes ☐ No If yes, how are they connected?

\_\_\_\_\_

How many live companies will be converted to v2014? \_\_\_\_\_ How many backup companies? \_\_\_\_\_

Please list the company codes to be converted and the number of Inventory warehouses in each company:

\_\_\_\_\_

How many years of historical data? \_\_\_\_\_

**MAS System Information:**

What version of MAS90/200 are you currently running? \_\_\_\_\_

What modules, if any, are installed but not currently being used?  
\_\_\_\_\_

What modifications, if any, are installed but not currently being used?  
\_\_\_\_\_  
\_\_\_\_\_

Are you using FRx? ☐ Yes ☐ No

Are you using F9? ☐ Yes ☐ No

Do you need to print consolidated financial statements? ☐ Yes ☐ No

Do you currently print Custom Financials? (*General Ledger, Custom Financial Reporting*) ☐ Yes ☐ No

Are you using FAS Asset Accounting Software? ☐ Yes ☐ No If yes, please list version:  
\_\_\_\_\_

Are you using third party software to link (via ODBC) to your current MAS 90/200? ☐ Yes ☐ No

If yes, please describe:  
\_\_\_\_\_

Are you using PC Charge ☐ or Sage Payment Services? ☐

Do you currently use KnowledgeSync ☐ or Business Alerts? ☐

If yes, how many alerts or events? \_\_\_\_\_

If yes, which modules are the alerts or events for?  
\_\_\_\_\_

Do you currently have any User Defined Fields (UDF'S) or customized screens? ☐ Yes ☐ No

If yes, which modules:  
\_\_\_\_\_

Do you currently use Import Master or Visual Integrator for importing data into MAS? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

If yes, which modules do you import into?  
\_\_\_\_\_

Will you want us to setup, train and implement Paperless Office? ☐ Yes ☐ No

If you are currently using Paperless Office, are you using the faxing feature? ☐ Yes ☐ No

Will you want us to setup, train and implement E-Filing for Payroll? ☐ Yes ☐ No

Will you want us to setup, train and implement National Accounts in Account Receivable? ☐ Yes ☐ No

Will you want us to setup, train and implement expanded invoice numbers in Accounts Payable? ☐ Yes ☐ No

Will you want us to setup, train and implement expanded item numbers in Inventory Management? ☐ Yes ☐ No

At level 2014 Sage offers a one user license of CRM at no charge. Are you interested in finding out more about this option? ☐ Yes ☐ No

For customers using ARM, at level 4.50 and above we have the option available to introduce ARA certified utilization reporting. Are you interested in finding out more about this option? ☐ Yes ☐ No

Sage no longer sends out CD's so the software must be downloaded ahead of the scheduled upgrade appointment. Have you already downloaded MAS level 2014 from the Sage website? ☐ Yes ☐ No

**Customized Reporting:**

Do you currently have Report Master reports that will need to be converted? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have custom Crystal Reports that will need to be converted? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have custom Crystal Reports **outside of MAS** that will need to be converted? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have custom Business Insights Explorer views (BIE)? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

**Customized Forms:**

Do you currently have any customized Sales Orders or Sales Order Invoice forms? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have any customized Sales Orders Picking Sheet forms? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have any customized Sales Orders Packing List forms? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have any customized Sales Orders Shipping Label forms? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have any customized ARM Contracts or ARM Invoice forms? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have any customized ARM Picking Sheet forms? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have any customized ARM Packing List forms? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have any customized ARM Shipping Label forms? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have any customized Accounts Receivable Invoice or Statement forms? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have any customized Accounts Payable Check or Direct Deposit forms? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have any customized Payroll Check or Direct Deposit forms? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have any customized Purchase Order or Purchase Order Return forms? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have any customized RMA or RMA Receiver forms? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

Do you currently have any customized Job Cost Invoice forms? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

**Printer Information:**

Do you currently use Dot Matrix printers? ☐ Yes ☐ No

If yes, how many? \_\_\_\_\_

If yes, what make and model?

\_\_\_\_\_

## Important, Please Note:

- Using Dot Matrix Printers has been shown to produce unpredictable and inconsistent results when printing from Windows. Please be prepared to have printing issues if Dot Matrix printers are used.
- If upgrading from a version of MAS 90/200 prior to v4.10, please note that, due to compatibility issues with the ODBC driver, during Phase II of your upgrade, the MAS client will need to be installed on a workstation(s) that do not currently access your live MAS data.
- The server on which MAS90/200 is installed will, at some point during the installation process, have to be rebooted in order to finish the software upgrade and data conversion. If this will be an issue during business hours, the installation will need to be performed after hours.
- Please notify your account manager if you have not downloaded the software from Sage. It is assumed that you have downloaded the software, as this is available to you from SAGE, if you are current on your Annual Maintenance Plan.
- Please review and fill out all pages of this document, sign and date it below, and fax it back to your account manager at BCSProsoft at 210-308-5580. Also include a copy of your installed applications listing. You can find this by selecting Library Master, Reports, Installed Modules Listing for v4.x or by selecting Library Master, Utilities, Installed Applications for version prior to 4.x.

Verified by: \_\_\_\_\_ Signed: \_\_\_\_\_  
Please print name

Company: \_\_\_\_\_ Date: \_\_\_\_\_