Installation Checklist

Sage 300 Construction and Real Estate version 20

Notes about compatible versions:

- If you use third-party products that integrate with Sage 300 Construction and Real Estate, check with your software vendor prior to upgrading to ensure their product is fully compatible with this release. We do not support rolling Sage 300 Construction and Real Estate back to a previous version and do not recommend it.
- There is no version of Sage Estimating (Pervasive) that is compatible with Sage 300 Construction and Real Estate version 20. However, you can use a compatible version of Sage Estimating (SQL) with Sage 300 Construction and Real Estate version 20.
- There is no Sage Document Management version 20. Document Management was retired on December 31, 2019; see Knowledgebase article 91616 for more information about the retirement. You can still run Document Management in a standalone environment; see Knowledgebase article 91608 for more information. DO NOT install Sage 300 Construction and Real Estate Accounting version 20 on the same machine as Document Management.

Step	Description	Done
1	Read the *Important* document, *Release Notes*, and the *User's Guide* for important information regarding this version of Sage 300 Construction and Real Estate (including new requirements) and detailed installation instructions. **Note:** If you plan to use a new server for Sage 300 Construction and Real Estate, migrate your programs and data (using the instructions in Chapter 3 of the *User's Guide)* before upgrading to version 20.	☐
2	Have your **Registration Name** and **Sage Client ID** (Account ID) handy. The ID is a 10-digit number that starts with 4. Also review the number of uses your company has purchased for each application by logging onto the Sage Customer Portal; see Knowledgebase article 87017 for more information. If you need to purchase additional uses, contact your authorized Sage business partner or your Sage customer account manager at 1-800-858-7095 (or email CREsales@sage.com).	☐
3	If you are upgrading from an earlier version: • Create a complete backup of all data and program files for Sage 300 Construction and Real Estate and Document Management. • Run File Doctor on all files. Even if you do not receive a corrupt file message, there may be issues File Doctor finds that it will not be able to fix after upgrading to version 20.	☐
4	Make sure that your server and workstations meet all other hardware and software requirements, including sufficient hard disk space for program and data files. If needed, install the appropriate operating system and service pack before you install Sage 300 Construction and Real Estate. See the System Requirements article in the Sage Knowledgebase for more information.	☐
5	Make sure that you have full control of the required folders, files, and registry keys on your file server, terminal server, and workstations that will have Sage 300 Construction and Real Estate installed. For a list of these for your operating system, see "Privilege settings required for installation and use" in Chapter 1 of the *User's Guide*.	☐

Step	Description	Done
6	Quit all programs and services for the duration of the installation. This includes programs that may be running in the background, such as antivirus, email, and backup programs.	☐
7	If needed, elevate your permissions. See "Privilege settings required for installation and use" in Chapter 1 of the *User's Guide* for more information.	☐
8	Verify the upgrade path; see "Supported upgrade paths" in Chapter 1 of the *User's Guide*. If you are upgrading from an older version, you may need to upgrade more than once to become current.	☐
9	Install Sage 300 Construction and Real Estate version 20 on the server. See Chapter 2 of the *User's Guide* for instructions. Be aware that the installation process may restart your server several times.	☐
10	After you install Sage 300 Construction and Real Estate version 20, restart the server, and log in as the same user that installed the software. Open the software and wait until the configuration process is completed.	☐
11	If you use Purchasing, Inventory, or Service Management and your company data folder is inside the **Programs Files** folder, move your data to a shared location.	☐
12	Install Sage 300 Construction and Real Estate version 20 on the workstations. Be aware that the installation process may restart the workstations several times. See Chapter 2 of the *User's Guide* for instructions. **Tip:** If you have a large number of workstations, you can use a script to silently install the software on client workstations. For more information, see Knowledgebase article KB 83952.	☐
13	If you upgraded from a version prior to 18.4, open and upgrade your **company** data folders.	☐
14	If you plan to run Sage SQL Replicator, use the Sage Universal SQL Installer to install an instance of the SQL database to hold your data. Also install SQL Replicator 2.0 by downloading the **SageSQLReplicator.exe** file and running the installation on your Sage 300 Construction and Real Estate Accounting server. See the *Sage SQL Replicator Setup Guide* for instructions.	☐
15	Restart all programs and services that you shut down for the installation.	☐