

Installation Checklist

Sage 300 Construction and Real Estate version 23

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 23. However, you can use a compatible version of Sage Estimating (SQL) with Sage 300 Construction and Real Estate version 23.
- There is no Sage Document Management version 23. Document Management was retired on December 31, 2019; see [FAQ Document Management retirement](#). You can still run Document Management in a standalone environment; see [How do I migrate Document Management to a standalone environment for image retrieval?](#). DO NOT install Sage 300 Construction and Real Estate Accounting version 23 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 23.	<input type="checkbox"/>
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 Online product entitlement in Sage 300 Construction and Real Estate 17.1.5 and later . 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).	<input type="checkbox"/>
3	If you are upgrading from an earlier version: <ul style="list-style-type: none">• 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 23.	<input type="checkbox"/>
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.	<input type="checkbox"/>
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 .	<input type="checkbox"/>

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.	<input type="checkbox"/>
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.	<input type="checkbox"/>
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.	<input type="checkbox"/>
9	Install Sage 300 Construction and Real Estate version 23 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.	<input type="checkbox"/>
10	After you install Sage 300 Construction and Real Estate version 23, 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.	<input type="checkbox"/>
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.	<input type="checkbox"/>
12	Install Sage 300 Construction and Real Estate version 23 on the workstations. Be aware that the installation process may restart the workstations. 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 How to install Sage 300 CRE client using a script (Silent Install) .	<input type="checkbox"/>
13	Open and upgrade your company data folders.	<input type="checkbox"/>
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.	<input type="checkbox"/>
15	Restart all programs and services that you shut down for the installation.	<input type="checkbox"/>