



Sage Accpac ERP – Sage Accpac Online

On Premise to Sage Accpac Online Switchover Checklist

(Updated: June 24, 2010)

Important

The process should be completed by a Sage Accpac Certified Consultant or a Sage Accpac Solution Provider.

Prepare for On Premise to Sage Accpac Online Switchover

After reading this entire document, please ensure all of the following steps are taken to prepare your data for the switch from On Premise to Sage Accpac Online:

- Make a backup copy of the databases for your own reference. You can use the Database Dump utility to do this.
- If you are doing an upgrade we recommend doing the upgrade offsite prior to the Switchover.
- Run the Data Integrity Check on all databases. If the report contains errors, you will need to correct the problems before proceeding with the Switchover.
- If you are using any custom reports such as checks or invoices, test them with the version you are planning to use in our Sage Accpac Online environment to confirm they will work as you require.
- If you are using any custom macros or applications, we will need to test them before we can consider them to be used in our Sage Accpac Online environment.
- If you are using any options modules or third-party applications, please confirm they are offered in our Sage Accpac Online for that version. Some of the Sage Accpac Options modules and Third-Party applications available for On Premise may not be offered in our Sage Accpac Online environment.

Ready for the Switchover

The Sage Accpac Online team will setup the new account, once the Sage Accpac Online Application has been processed. The account will be setup based on the information on the online application. The Sage Accpac Online application is available through the following link:

<https://www.accpaonline.com/ssl/subscribe/>

For billing or administration related questions email admin.accpaonline@sage.com.

Once the Certified Consultant has completed all items in the above “On Premise to Sage Accpac Online Switchover” checklist and they are ready for the Switchover, they should contact the Sage Accpac Online team through one of the methods listed below to schedule a date and time to perform the switch.

- Sage Accpac Online Support: 1-877-223-4828
- Email: support.accpaonline@sage.com

On the scheduled date and time the Sage Accpac Online team will send out a Welcome Email to the client’s main contact on file and to their partner. The Welcome Email will include all the information about the account including products, databases subscribed to and Login IDs and passwords.

Switchover Process

Once the certified consultant is ready for the switchover they will need to dump the databases in the On Premise environment and transfer the databases and any custom reports and macros to the customer’s I:\ drive in the Sage Accpac Online Environment. Once the database dump files, custom reports and macros have been transferred, the Certified Consultant can use the Database Load Tool to load the databases and then create Customization Directories to setup the custom reports in the Sage Accpac Online environment.

Important

Do not perform the database dump and database load functions directly to the mapped local drives. Do not load the databases directly from the mapped local drives. Transfer the database dump files to the I:\ Drive first then load the databases from the I:\ Drive.

Switchover Completed

The certified consultant will verify everything is working properly before advising the client to start any processing and they will also inform the Sage Accpac Online team that the Switchover has been completed.