



ProspectSoft

On-premise Installation Requirements

Abstract

Prospect CRM is a cloud-based solution and for the browser-based components there is no installation required (just minimum browser requirements).

However, to support the options for automation and integration to on-premise accounting and ERP solutions, an on-premise installation is required.

There are also limitations on which on-premise versions of Exchange and Office are able to support the Prospect Outlook app and Word integration.

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Web Browser Support

Prospect is compatible with the *latest two versions* of the following browsers:

- Chrome
- Firefox

Please note: Microsoft Internet Explorer and Edge are not supported because these have both been deprecated by Microsoft. Their new Edge browser (based on the Chromium engine will likely be suitable when fully available as a mainstream browser).

We endeavour to provide general support for the latest version of other mainstream browsers on various devices (such as iOS and Android), however compatibility may vary - especially with older OS versions and devices.

Office, Outlook & Exchange Integration

Exchange Server

Prospect CRM mainly integrates with the client-side Outlook app (Outlook Desktop or Outlook Web) but also requires an Exchange Server back-end (i.e. other POP3 mail servers will not work). We suggest:

- Office 365 Hosted Exchange (Recommended)
- Exchange Server 2016 and above
- Exchange Server 2013 has limited support and support will end soon

Please note: you will need access to the Office Store in Outlook to install the Save to CRM app.

Microsoft Office

Prospect is compatible with the following Microsoft Office products:

- Microsoft Office 365 with local installation of Office 2019
- Microsoft Office 365 with local installation of Office 2016
- Microsoft Office Professional 2016
- Microsoft Office 365 with local installation of Office 2013
- Microsoft Office Professional 2013

Please note: Microsoft recommends 32-bit Office installation even on 64-bit Operating Systems – mainly due to compatibility with their own and third-party integrated components.

On-premise Accounting System Gateway Requirements

NOTE RE: Xero & Unleashed

Prospect CRM provides integration to Xero or Unleashed via Web API's. There are therefore no hardware or OS requirements for these cloud integrations. This section only refers to traditional on-premise integrations.

General Advice

The information given below is for guidance only. You should seek appropriate professional advice about your hardware and networking requirements.

The hardware required is dependent upon not just the needs of running your Prospect software but also upon the needs of other applications and services running on the same server network. This includes memory, processor, disk and other contentions.

Similarly, the recommendations below should be considered in the context of usage, volume of CRM data, volume of accounting system transactions and other relevant factors.

Core OS & Microsoft Software

ProspectSoft is a Microsoft Gold Cloud Platform and Gold DevOps Partner. We work hard to test and certify our products on the common Microsoft platforms. However, it is virtually impossible to test every combination of OS Version, OS Edition, OS Service pack, 3rd party Virtualisation platforms, 3rd Party Anti-Virus or other solutions, Office Version, Office Edition, Office Service pack, Internet Explorer version, Accounting software products, etc. We therefore strongly recommend using only up-to-date and mainstream versions and editions of Microsoft products.

ProspectSoft cannot provide support for our Solutions running on or alongside Microsoft products and platforms that have ended Extended Support and can only provide limited support alongside products and platforms outside of Mainstream support.



Server OS

Server Operating System	Support Status
Windows Server 2008	Unsupported
Windows Server 2008 R2	Unsupported Prospect CRM accounts integration may run on this OS, but Microsoft ended Mainstream Support for Server 2008 R2 on 13 th January 2015.
Window Small Business Server 2011	Unsupported
Windows Server 2012 Essentials	Unsupported
Windows Server 2012	Unsupported Prospect CRM accounts integration will run on this. Microsoft ended Mainstream Support for Server 2012 R2 on 9 th October 2018.
Windows Server 2012 R2	Unsupported Prospect CRM accounts integration will run on this. Microsoft ended Mainstream Support for Server 2012 R2 on 9 th October 2018.
Windows Server 2012 R2 Essentials	Unsupported
Windows Server 2016	Supported
Windows Server 2016 Essentials	Unsupported
Windows Server 2019	Supported
Windows Server 2019 Essentials	Unsupported

NOTE: The server installation must be a full Windows installation including the Windows UI.

Server Hardware

Prospect CRM is hosted in Microsoft Azure. As the solution is hosted, the following recommendations are based on a dedicated virtual server for Prospect CRM Automation and Integration Services to create a hybrid integration to your on-premise accounting or ERP system. Further allowances should be made for other applications or services running on the same server (such as Exchange, other databases, Accounting System Software and Anti-Virus products).

Ultimately Microsoft recommends running different server applications on separate server machines (either physical or virtual) and while this is not always practical it will reduce the conflicts for memory, handles, and CPU. It is worth noting that without a specific configuration, virtualisation will not reduce disk contention (i.e. where the virtual servers use the same physical disk).

Prospect CRM Automation & Integration Services

The Automation Services will run on a schedule processing your accounting and other data. The requirements below are in addition to the requirements for the OS and other software:

GUIDELINE ONLY	eCommerce Integration Gateway/up to 5,000 invoice lines per week	Up to 10,000 invoice lines per week	Up to 50,000 invoice lines per week	Larger
CPU Cores	1	2	4	4+
Installation disk space	1GB	1GB	1GB	1GB
Data disk space	1GB	2GB	10GB	50GB+
Available RAM*	1GB	2GB	4GB	8GB+
Network	100MB	100MB/Gigabit	Gigabit	Gigabit

Please note: Exchequer integration requires approximately twice this amount of RAM and, due to limitations with UNC paths within the COM Toolkit, must be run on the same server as the Exchequer database.

Accounting System Requirements

Prospect CRM has accounting system integration at its core. We lead the market in integration and are continually developing greater and broader integration features. However, we know that stability is equally important when you are running a business. We therefore recommend that you allow six months for full public testing on any new accounting system version, but don't allow your accounting version to become more than eighteen months out of date.

Ultimately some releases of Prospect CRM will require newer versions of your accounting system and vice versa. If in doubt, please ask for advice and perform your own testing before upgrading your Prospect CRM solution or your accounting system.

Exchequer

Prospect CRM requires Exchequer 7.07 as a minimum. ProspectSoft provides full support for our solutions running alongside the following Exchequer Versions:

- Exchequer 2015 R1 (or later) on Pervasive SQL
- Exchequer 2015 R1 (or later) on SQL Server

In all cases, Prospect CRM requires the Exchequer Toolkit for integration. The Automation Server requires a COM toolkit (and pervasive or SQL) license, as does any client wishing to communicate directly with live Exchequer data.

Access Dimensions

Prospect CRM requires Access Dimensions 2.50.g as a minimum.

Access Dimensions runs on Microsoft SQL Server. Prospect requires SQL Server 2008 R2 as a minimum.

Pegasus Opera

Prospect CRM requires Opera II or Opera 3. For full sales integration capabilities, ProspectSoft requires:

- Pegasus Opera 3 with Cashbook, Stock and SOP modules
- Pegasus Opera II with Cashbook, Stock and SOP modules

Sage 50

Sage usually release a new version of Sage 50 annually. ProspectSoft typically recommends the latest Sage 50 release, yet we may not be able to offer full support immediately after the release of a new version. Customers must check with us before applying the very latest Sage 50 version. ProspectSoft are fully accredited Sage 50 developers, so we know that each Sage 50 release is not intended to be backwards compatible as you might expect. Each release typically requires specific work to make it fully compatible and will often require a parallel CRM upgrade.

ProspectSoft requires a minimum of:

- Sage 50 Accounts Professional 2016 and above*
- Sage 50c

*ProspectSoft integration requires Sage Professional Edition with third-party integration enabled.

Xero & Unleashed

ProspectSoft are App Partners with Xero and Unleashed. Prospect CRM provides straightforward integration to Xero or Unleashed via Web API's. Therefore, there are no hardware or OS requirements for these cloud integrations.

Additional Notes

Server Virtualisation

ProspectSoft recommends Microsoft Hyper-V (which we use ourselves). Prospect CRM is also being successfully deployed by customers using VMWare and other virtualisation platforms. ProspectSoft will support our software running within a mainstream Virtualised Windows deployment but we recommend you take appropriate expert advice on the underlying Virtualisation and Networking infrastructure.

Integration

Integration with other systems is at the heart of Prospect CRM and you should therefore consider this document alongside the supported and recommended environments for your accounting solution and other products.

Exchange & SQL Server

Microsoft recommends hosting your Exchange with Office 365, or for LAN-installation, a dedicated (virtual) server for running Exchange Server, SQL Server and many other Microsoft Services. Although Small Business Server bundled these, that solution has been all-but abandoned by Microsoft and, in general installing multiple database products on a single Microsoft Server is problematic and leads to Exchange grabbing all available resources etc. Installation on shared servers is not recommended. Wherever possible we would recommend dedicated (virtual) servers for Exchange, your accounts system and Prospect CRM Automation and Integration services. Or, alternatively look at hybrid hosting solutions such as Office 365 hosted Exchange to reduce the load on your servers.

If your IT Service provider does install combinations of Prospect CRM, your accounting system and Exchange or Microsoft SQL etc. on the same server, then they must ensure that a cap is put on the resources that these other products can use (especially RAM) – and that there is always enough free RAM and resources for new processes to start or ramp up as and when required (e.g. your ProspectSoft Accounts Import which only runs periodically).