Prospect 365 CRM
Installation Requirements
Prospect 365 Software

Prospect 365 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 LAN-based accounting and ERP solutions, the Windows Desktop App, installation is required.

This document sets out the current hardware and software requirements for running local server based Prospect 365 automation and integration services and the Desktop Prospect 365 CRM application, for the latest Prospect 365 CRM Software (currently 7.0 Preview).

ProspectSoft always recommends customers keep their CRM system up to date and deploy the latest version, but this document also sets out the support lifecycle for older 365 CRM versions.
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Core OS and Microsoft Software

ProspectSoft is a Gold Microsoft Application Development 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.

Microsoft Partner
Gold Application Development
Gold Cloud Platform

Server OS

Prospect 365 CRM Accounts-integration components will run on Microsoft Server 2008 R2 – running 64 bit. However, Microsoft ended Mainstream Support for Server 2008 R2 on 13th January 2015.

ProspectSoft is therefore only able to provide full support for our solutions on the following 64-bit Server Operating Systems:

- Microsoft Server 2016
- Microsoft Server 2012 R2 (Recommended Platform)
- Microsoft Server 2012

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

Exchange Server

Prospect 365 CRM mainly integrates with the client-side email solution (Outlook Desktop) and most features will work with any mail server, but future versions will increasingly integrate with Exchange Server. ProspectSoft suggests:
• Office 365 Hosted Exchange (Recommended)
• Exchange Server 2013

Desktop/Laptop OS

ProspectSoft requires a full version of Windows (not RT or embedded) for the Prospect 365 CRM Desktop App.

Prospect 365 CRM Desktop App will run on 64-bit Windows 7, however Microsoft ended Mainstream support for Windows 7 on January 13, 2015.

ProspectSoft is therefore only able to provide full support for the CRM Desktop App running on the following 64-bit Client Operating Systems:

• Microsoft Windows 10 (Recommended)
• Microsoft Windows 8.1

Microsoft Office

Many Prospect CRM Desktop App features require a local installation of Microsoft Office (Desktop version), including Word, Excel and Outlook.

Prospect 365 CRM Desktop App will generally run with Microsoft Office 2010 (with some limitations), however Microsoft ended Mainstream support for Office 2010 on 13th October 2015.

ProspectSoft is therefore only able to provide full support for our solutions running alongside the following 32-bit* Microsoft Office products:

• Microsoft Office 365 with local installation of Office 2016 (Recommended)
• Microsoft Office 365 with local installation of Office 2013
• Microsoft Office Professional 2016
• Microsoft Office Professional 2013

*Microsoft recommends 32-bit Office installation even on 64-bit Operating Systems – mainly due to compatibility with their own and third-party integrated components. Prospect 365 CRM Desktop App only integrates with 32-bit Office.

Web browsers and Internet Explorer

Many older versions of Internet Explorer are tied to Operating Systems that are no longer supported by Microsoft. ProspectSoft provides support for our solutions running alongside the browsers:

• Edge Browser
• Internet Explorer 11
• Chrome (Recommended)

Microsoft themselves will only support Office 365 with the latest version of Internet Explorer.
Non-Microsoft browsers are generally compatible with Web-based ProspectSoft Solutions but cross-browser compatibility is an ongoing challenge across the internet and ProspectSoft recommends one of the above be installed as a minimum. ProspectSoft endeavours to provide general support for the latest version of other mainstream browsers (such as Chrome and Firefox).

ProspectSoft also endeavours to provide general support for the latest version of other mainstream browsers on non-Microsoft devices (such as iOS and Android), however compatibility may vary - especially with older OS versions and devices.
Hardware Requirements

General Advice

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

In particular, the hardware required is dependent upon not just the needs of running your ProspectSoft 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.

Server Hardware

Prospect 365 is hosted in Microsoft Azure. As the solution hosted, the following recommendations are based on a dedicated virtual server for Prospect 365 Automation and Integration Services. 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 365 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:

<table>
<thead>
<tr>
<th>GUIDELINE ONLY</th>
<th>eCommerce Integration Gateway / up to 5,000 invoice lines per week.</th>
<th>Up to 10,000 invoice lines per week</th>
<th>Up to 50,000 invoice lines per week</th>
<th>Larger</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPU Cores</td>
<td>1</td>
<td>2</td>
<td>4</td>
<td>4+</td>
</tr>
<tr>
<td>Installation disk space</td>
<td>1Gb</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data disk space</td>
<td>1Gb</td>
<td>2Gb</td>
<td>10Gb</td>
<td>50Gb+</td>
</tr>
<tr>
<td>Available RAM*</td>
<td>1Gb</td>
<td>2Gb</td>
<td>4Gb</td>
<td>8Gb+</td>
</tr>
<tr>
<td>Network</td>
<td>100MB</td>
<td>100Mb/Gigabit</td>
<td>Gigabit</td>
<td>Gigabit</td>
</tr>
</tbody>
</table>
* 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.

CRM Desktop App Hardware

The following recommendations are based on using the Prospect 365 CRM Desktop App alongside Microsoft Office. Further allowances should be made for other applications or services running on the same machine (such as Accounting System clients, Anti-Virus products, etc).

<table>
<thead>
<tr>
<th>GUIDELINE ONLY</th>
<th>Minimum</th>
<th>Power User</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Suggested Processor</strong></td>
<td>Core Duo/i3 or equivalent</td>
<td>i5 or equivalent</td>
</tr>
<tr>
<td><strong>CPU Cores</strong></td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td><strong>Disk Drives</strong></td>
<td>SATA</td>
<td>SSD</td>
</tr>
<tr>
<td><strong>Installation disk space</strong></td>
<td>1Gb</td>
<td>1Gb</td>
</tr>
<tr>
<td><strong>Data disk space</strong></td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>RAM</strong></td>
<td>2Gb</td>
<td>4Gb</td>
</tr>
<tr>
<td><strong>Network</strong></td>
<td>100Mb Ethernet</td>
<td>100Mb/Gigabit</td>
</tr>
<tr>
<td><strong>Internet Access</strong></td>
<td>Outbound HTTPS traffic is required</td>
<td></td>
</tr>
</tbody>
</table>

Desktop Telephony

Any CRM Desktop App that requires telephony integration will require suitable TAPI drivers provided and configured by your telephone system vendor. Drivers must be TAPI 1.4 compliant. Exact functionality and features may vary between phone systems and drivers.

Accounting System Requirements

Prospect 365 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 365 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 365 solution or your Accounting system.

More specific advice of known scenarios is given below.

Exchequer

Prospect 365 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 (Recommended)
- Exchequer 2015 R1 (or later) on SQL Server

In all cases, ProspectSoft 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 365 requires Access Dimensions 2.50.g as a minimum. ProspectSoft Recommends:

- Access Dimensions 2.50.g

Access dimensions runs on Microsoft SQL Server. ProspectSoft requires SQL Server 2008 R2 as a minimum. ProspectSoft Recommends:

- Microsoft SQL Server 2012
- Microsoft SQL Server 2008 R2

Pegasus Opera

Prospect 365 requires Opera II or Opera 3. For full sales integration capabilities, ProspectSoft requires:

- Pegasus Opera 3 with Cashbook, Stock and SOP modules (Recommended)
- 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 Sage50 release but only after full ProspectSoft testing. Customers must check with us before applying the very latest Sage 50 version. ProspectSoft are fully accredited Sage50 developers, so we know that each Sage50 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 Recommends:

- Sage 50 Accounts Professional 2016 *
- "New" Sage 50 Accounts Professional (Sage 50 2015) *


Prospect 365 Versions

ProspectSoft only provides full support on fully patched mainstream versions. Support resolutions may well require you to upgrade to the latest patch on the latest version.

Mainstream versions currently include:

- Prospect 365 7.00 Preview

End of Support for prior versions

ProspectSoft CRM Version 6, prior to 6.52 ended support on 1st January 2016.

Additional Notes

Task Centre Installation Requirements

Task Centre is a product used in many ProspectSoft installations but developed by Orbis Software Ltd. Details of the installation requirements for Task Centre can be found at:

http://www.orbis-software.com/products/requirements.php

Please note however that ProspectSoft only supports Orbis Task Centre running against a full MS SQL Server database. ProspectSoft does not recommend or support Task Centre deployed with the traditional proprietary back-end database.
Server Virtualisation

ProspectSoft recommends Microsoft Hyper-V (which we use ourselves). Prospect 365 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 365 and you should therefore consider this document alongside the supported and recommended environments for your Accounting Solution and other products.

Exchange and 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 365 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 you IT Service provider does install combinations of Prospect 365, 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).

Various advice is available online with regard to limiting the resources used by Exchange Server, e.g.


