

# Custom Connect Solutions / ConnectWise™

## Reporting

### Customer Site Survey

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<b>Company Information</b>	
Company name	
Company address	
Company address 2	
Company City	
Company State	
Company Postal Code	
<b>Contact Information</b>	
ConnectWise administrator name	
ConnectWise administrator telephone	
ConnectWise administrator email	
Reporting contact name	
Reporting contact telephone	
Reporting contact email	
<b>SQL Server Information</b>	
SQL Server computer name	
SQL Server IP address	
Host operating system version	
Host operating system edition (standard, enterprise, ...)	
Host OS architecture ( x86, x64, IA64 )	
SQL Server instance name	
SQL Server version	
SQL Server edition (standard, enterprise, ...)	
SQL Server architecture ( x86, x64, IA64 )	
SQL Server service pack level	
SQL Server remote desktop connection information	
SQL Server login account (to be used to create db objects) See note 1.	
SQL Server password (to be used to create db objects)	
<b>SQL Server Reporting Services Information</b>	
SSRS Server computer name	
SSRS Server IP address	
Host operating system version	
Host operating system edition (standard, enterprise, ...)	
Host OS architecture ( x86, x64, IA64 )	
SSRS version	
SSRS edition	
SSRS architecture ( x86, x64, IA64 )	
SSRS service pack level	

Is SSRS configured on your server?	
SSRS Report Manager URL	
SSRS Report Server URL – Internal access	
SSRS Report Server URL – External access	
<b>Windows Domain Credentials</b>	
Windows domain name	
Windows domain login name This account must be a content manager in SSRS	
Windows domain password	
<b>ConnectWise Information</b>	
Current ConnectWise version	
List your ConnectWise database names (production, training)	
What accounting system do you use?	
ConnectWise login account (to be used to test reports)	
ConnectWise password (to be used to test reports) See note 1.	

Note 1.

- Password information can be provided after we have a signed agreement to develop the report

Note 2.

Options for SQL Server account security:

- This account could be setup with the sysadmin server role. (Least secure)
- This account could be setup with the db\_owner database role in each ConnectWise database.
- This account could be granted create procedure and create function database permissions and also the db\_datareader database role. (Most secure)

Questions regarding this form should be directed to Alex Czaplicki: 412-677-1420 or  
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