



## INSTALLING REDHORSE CRM

This article will walk you thru the process of installing RedHorse CRM.

### System Requirements

RedHorse CRM uses a Microsoft SQL Server database backend. If you do not have Microsoft SQL Server installed on your server or workstation, please install it before installing RedHorse CRM. Please see our website for instructions on installing Microsoft SQL Server.

RedHorse CRM System Requirements include:

- **Server Requirements**
  - Microsoft® Windows Server 2003 or 2008
  - Microsoft® SQL Server™ 2005 or 2008, Express or higher
  - 2.0 GHz or faster CPU
  - 1 GB RAM or more recommended
  - 500 MB or more storage recommended depending upon size of database
- **Workstation Requirements**
  - Microsoft® Windows XP or Vista, 32Bit or 64Bit
  - 1 GB RAM or more recommended
  - 1.5 GHz or faster CPU
- **Other Requirements**
  - Microsoft SQL Server 2005 or 2008 Reporting Services (Only if using integrated reports -Included with Microsoft SQL Server 2005 and 2008, Express and higher)
  - Microsoft Word 2003 or 2007 (Only if using merged documents with Word)
  - Microsoft Outlook 2003 or 2007 (Only if using email integration with Outlook)
  - QuickBooks Professional 2007 or higher (Only if linking RedHorse CRM to QuickBooks)

## Step 1: Download the Latest Version

You should have received a logon for the website that gives you access to the Downloads page. If you did not, please contact [support@redhorsesystems.com](mailto:support@redhorsesystems.com).

Visit [www.redhorsesystems.com](http://www.redhorsesystems.com) and log into the website with the username and password provided to you by support. Use the main website navigation bar to go to the Updates page. Click the download link and save the file to your computer.

## Step 2: Run the Installer

Run the setup.exe file that you downloaded.

In the installer, browse to the location where you would like to install RedHorse CRM. The default path is c:\Program Files\RedHorse Systems\CRM. If you are going to be running RedHorse CRM on workstations connecting to a network, you should change the installation path to a shared network location on your server.

Select the Full Install setup type.

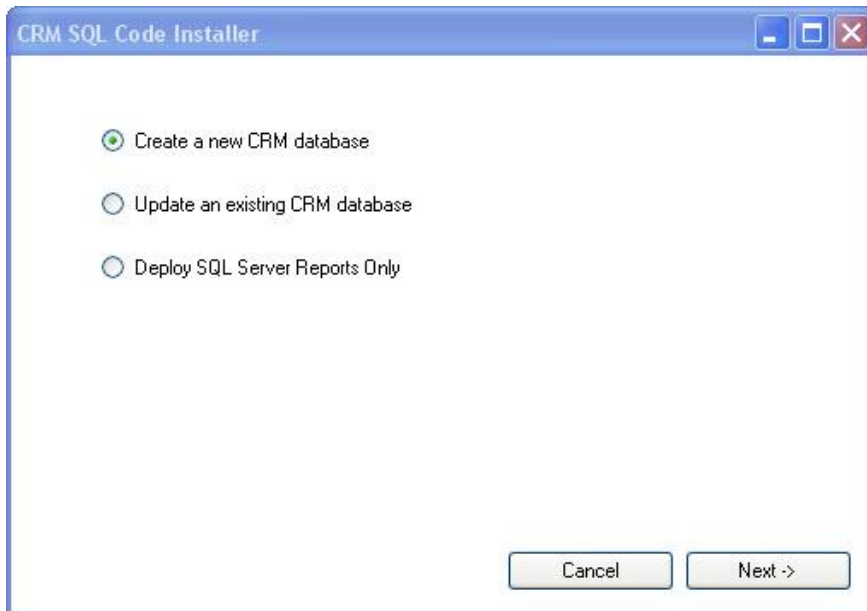
Click Install.

When the installation completes, click Finish. This will launch the SQL Code Installer.

## Step 3: Run the SQL Code Installer

When the main installer finishes, the SQL Code Installer will automatically launch. This installer may also be launched manually from the path where RedHorse CRM is installed. The file is called SQL.exe.

Select Create a New CRM database and click Next.

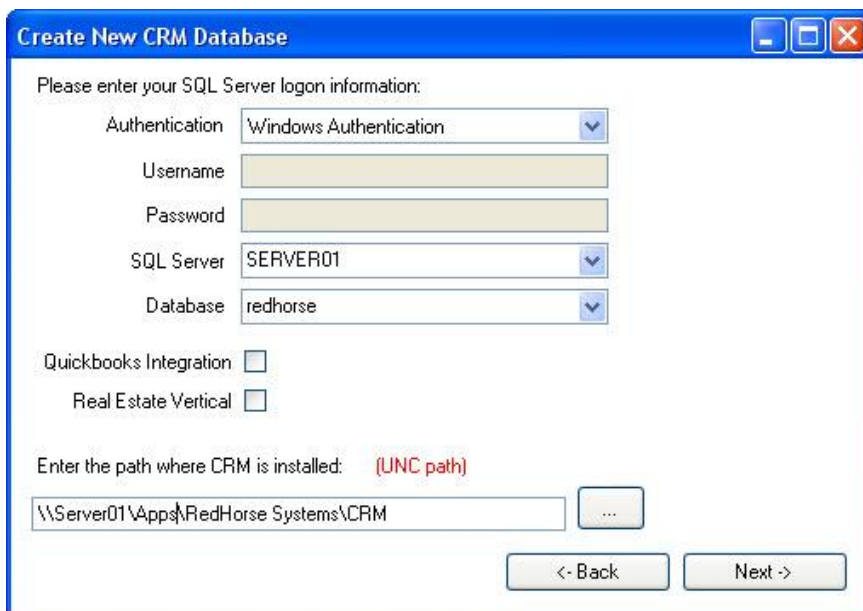


Enter the logon information for your SQL Server.

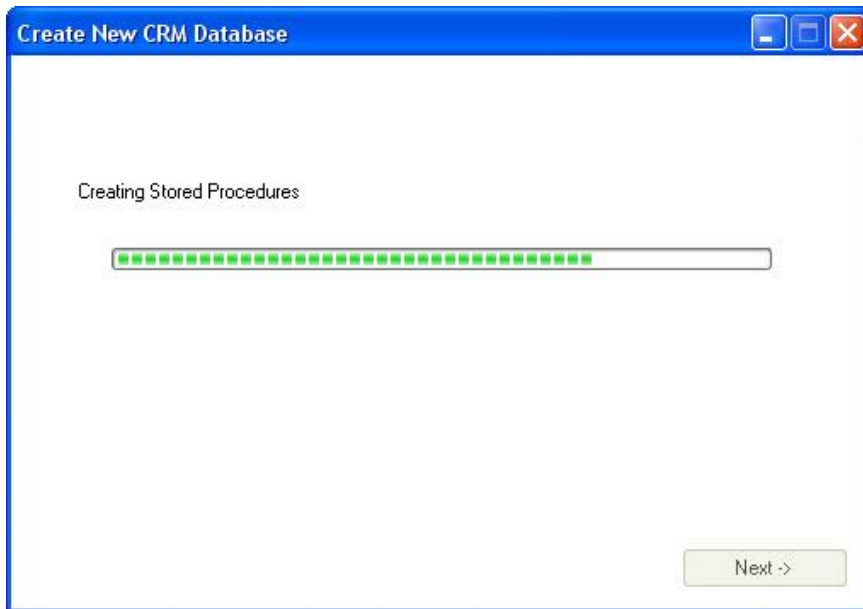
Enter a name for your new RedHorse CRM database.

Check “QuickBooks Integration” or “Real Estate Vertical”, if appropriate for your installation. These options are not available together. When installing the QuickBooks integration, enter a name for your new RedHorse QuickBooks SQL database. This is not the location of your QuickBooks company file.

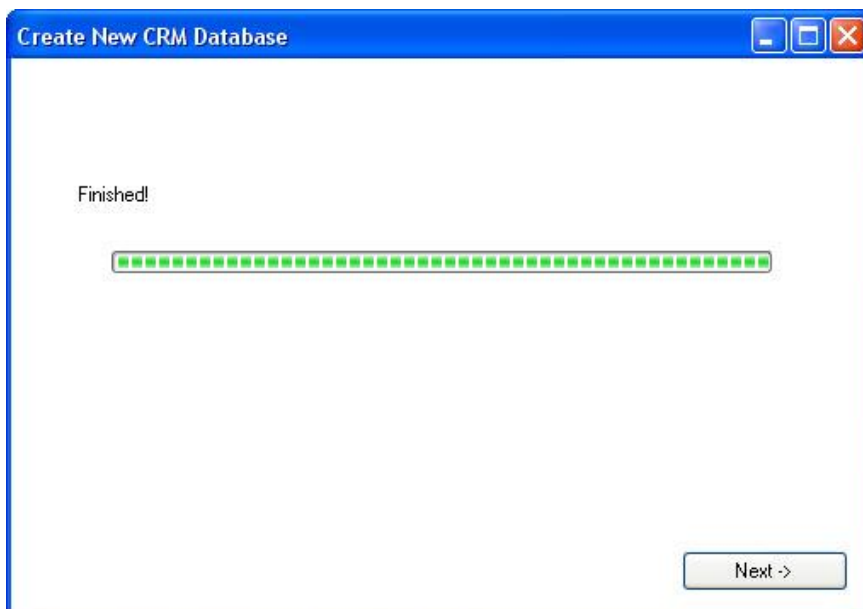
You must use a UNC path to the location where CRM is located for this portion of the installation process. Click Next.



You will see the progress as the install runs.



When the code installation completes, click Next.



If you are using SQL Reporting Services and would like to install the standard system SQL reports, enter SQL Reporting Services logon information.

It is not necessary to complete this step if you will not be using SQL Reports with CRM. It can also be skipped at this time and run during a later update to CRM. If you are not using SQL Reporting Services or want to install at a later time, click Close. Otherwise, complete the information requested.

Deploy SQL Server Reports

Please enter your SQL Reporting Server logon information:

Authentication: Windows Authentication

Username: [Empty]

Password: [Empty]

SQL Report Server: SERVER01

Report Server Database: ReportServer

Report Server Virtual Directory: ReportServer

Report Location: /RedHorse (Leave blank for root)

Datasource Location: /RedHorseDS

Datasource Name: RedHorseDSN

CRM Report Template Path: \\Server01\Apps\RedorseSystems\CRM\Templates\

Overwrite Existing Reports:

Buttons: Close, Deploy

**Login information** – the authentication type, username and password for logging into the SQL Server where Reporting Services is installed.

**SQL Report Server** – the name of the SQL Server, including instance if applicable, where Reporting Services is installed.

The following parameters are found in the Reporting Services Configuration Manager.

**Report Server Database** – the name of the SQL Server database where Report Server content and data are installed. In SQL 2005, this may be found by selecting the Database Setup section of the Reporting Services Configuration Manager. In SQL 2008, this may be found by selecting the Database section of the Reporting Services Configuration Manager.

**Report Server Virtual Directory** – the URL used by SQL Server to access the Report Server. In SQL 2005, this may be found by selecting the Report Server Virtual Directory section of the Reporting Services Configuration Manager. In SQL 2008, this is called the SQL Server Web Service Virtual Directory and may be found by selecting the Web Service URL section of the Reporting Services Configuration Manager.

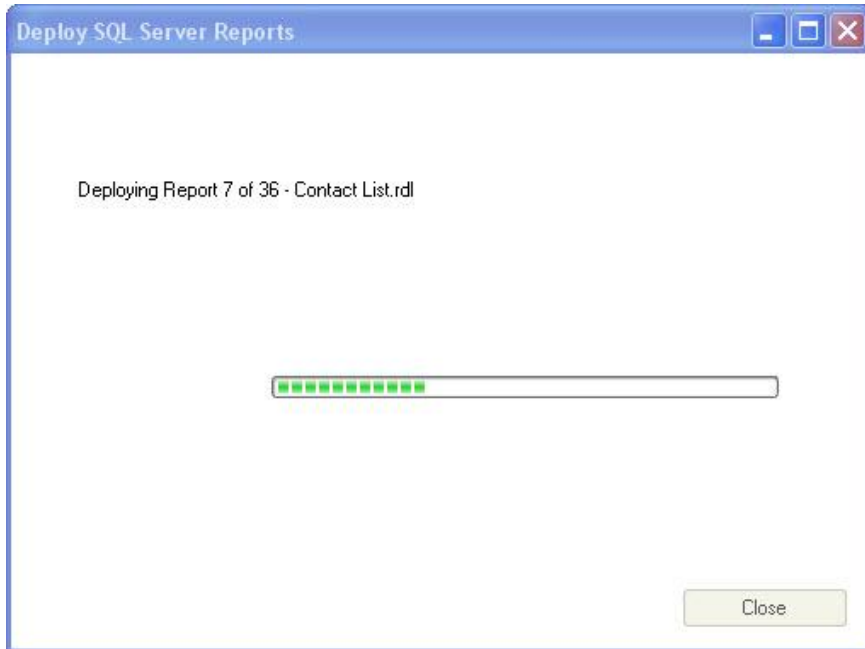
The following parameters are defined by you to help organize CRM reports in the Report Server.

**Report Location** – the virtual directory that will be added to the Report Server Virtual Directory where CRM reports will be installed. Example: /RedHorse. If this is left blank, reports will be installed to the root directory.

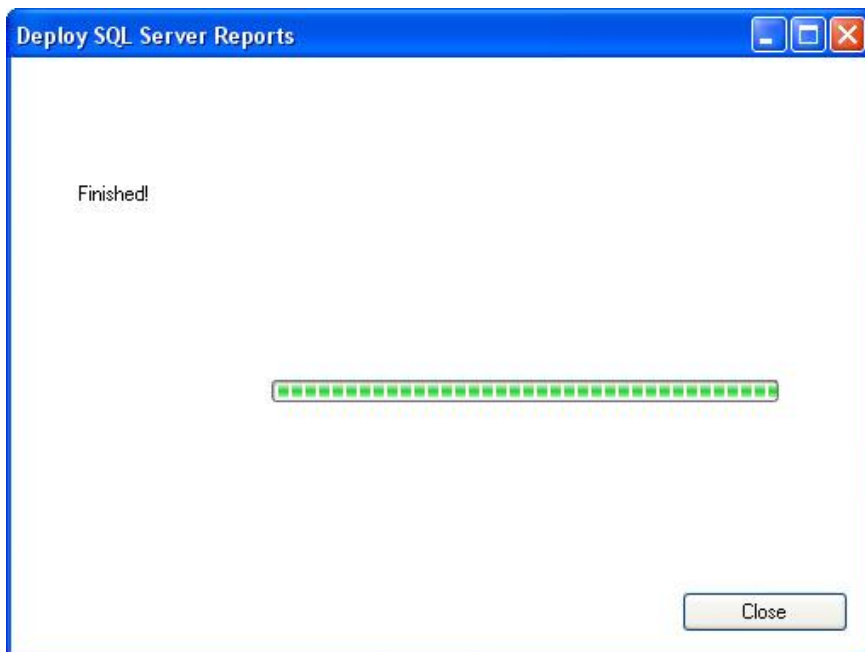
**Datasource Location** – the virtual directory that will be added to the Report Server Virtual Directory for storing the Datasource name and definition.

**Datasource Name** – the name of the datasource that will be used for CRM reports.

Click Deploy to begin. You will see progress as reports are deployed.



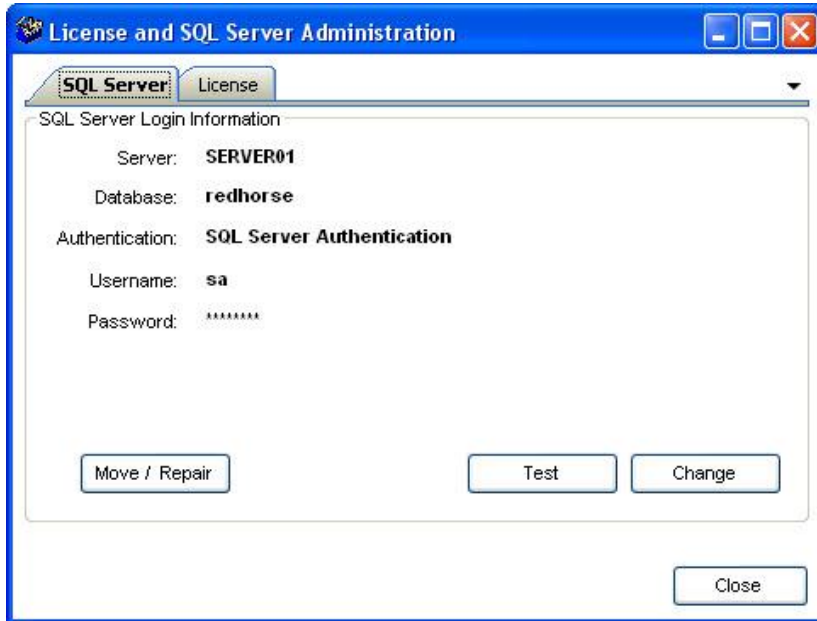
Click Close when the installer finishes.



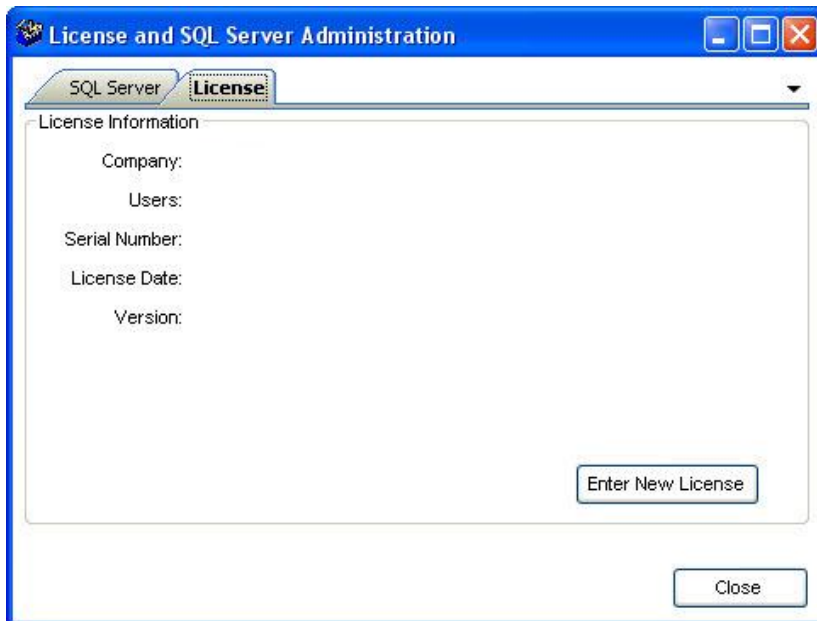
Your installation is now ready to be licensed.

## Step 4: Licensing CRM

When the SQL Code installer finishes, the License Manager will automatically launch. This installer may also be launched manually from the path where RedHorse CRM is installed. The file is called LicenseManager.exe. Your SQL Server login information will already be entered for you based on your entries in the SQL Code installer.



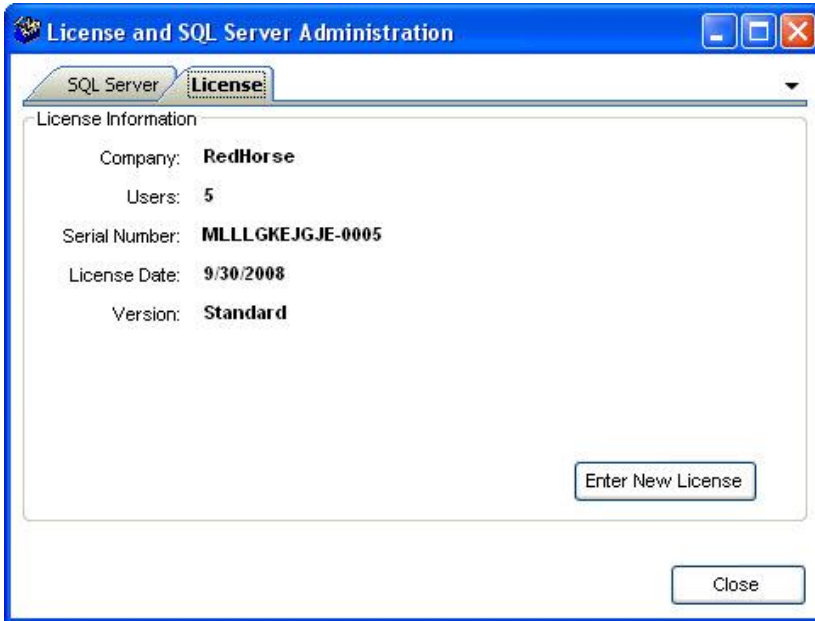
Click the License tab.



Click Enter New License and enter your CRM license number.



Click OK to save and your new license will be installed.



## Step 5: Setting up workstations

If you will be running RedHorse CRM on workstations connecting to a network, you should proceed to each workstation and run the Workstation setup using the wksetup.exe file located in the RedHorse CRM directory. Be sure to select the shared path to the network installation of RedHorse CRM when running the workstation installer. See separate instructions for running CRM across a network.

## Step 6: Logging in for the first time

To log into CRM, use the new shortcut that was added to your desktop, or run the file CRM.exe found in the folder where you installed CRM. In a new RedHorse CRM installation, there is one default user and it is MASTER. It does not have a password by default. The first time any new user logs in, you can enter a new password for that user. CRM will confirm the password and then set it for you. You can leave the password blank if you like. Passwords can also be changed later in Admin.

Please contact support if you experience any issues during the installation process.