



INSTALLING REDHORSE CRM

This article will walk you thru the process of installing the Core, Essential and Complete editions of 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.

Please see our website for a full list of system requirements.

Step 1: Download the Latest Version

The latest version of RedHorse CRM is available on the Downloads page of the www.redhorsesystems.com website. This page requires login. If you do not yet have a login, you may use the Register button at the top of the website to create one. Once logged in, go to Support, Downloads and click the link to the Current Version of RedHorse CRM to get the latest version.

Select RedHorse CRM as the product to download, enter the RedHorse CRM License number that was provided to you after purchasing, and click Submit. Save the file to your computer.

Step 2: Run the Installer

Run the setup.exe file that you downloaded.

In the Optional Features window, choose RedHorse CRM and Standard RedHorse SQL Reports.

In the Installation Folder window, browse to the location where you would like to install RedHorse CRM. The recommended path is C:\RedHorse Systems\RedHorse CRM. If you are going to be running RedHorse CRM on workstations connecting to a network, you should change the installation path to a location on your server that will then be shared across the network. It is not recommended to install to a mapped drive, as the installer will not be able to register dll components for use with the QuickBooks integration.

Click Install.

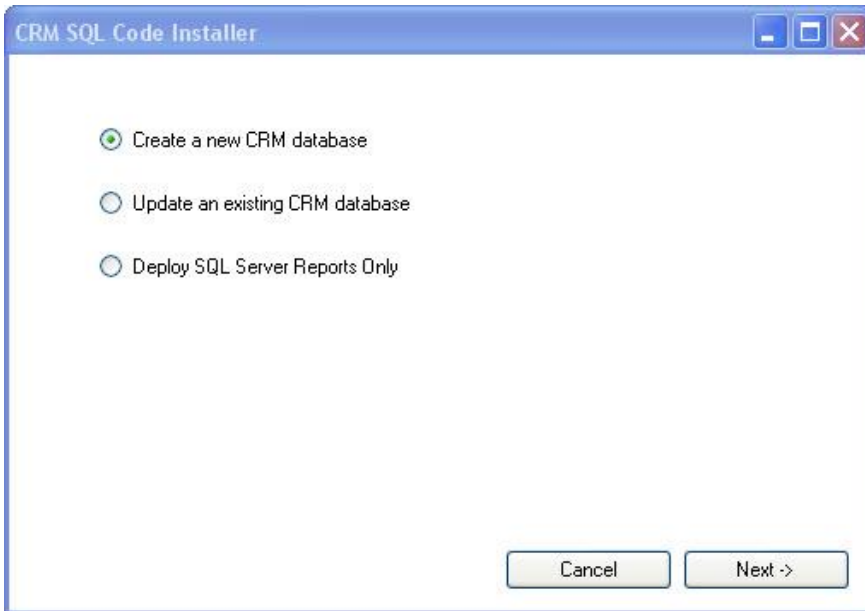
When the application has completed installing, the installer will automatically launch the CRM SQL Code Installer.

Follow the steps below to run the SQL Code Installer. When the process finishes, click Finish to close the 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" if appropriate for your installation. 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.

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

Create New CRM Database

Please enter your SQL Server logon information:

Authentication:

Username:

Password:

SQL Server:

Database:

Quickbooks Integration:

Enter the path where CRM is installed: (UNC path)


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< - Back Next ->

You will see the progress as the install runs.

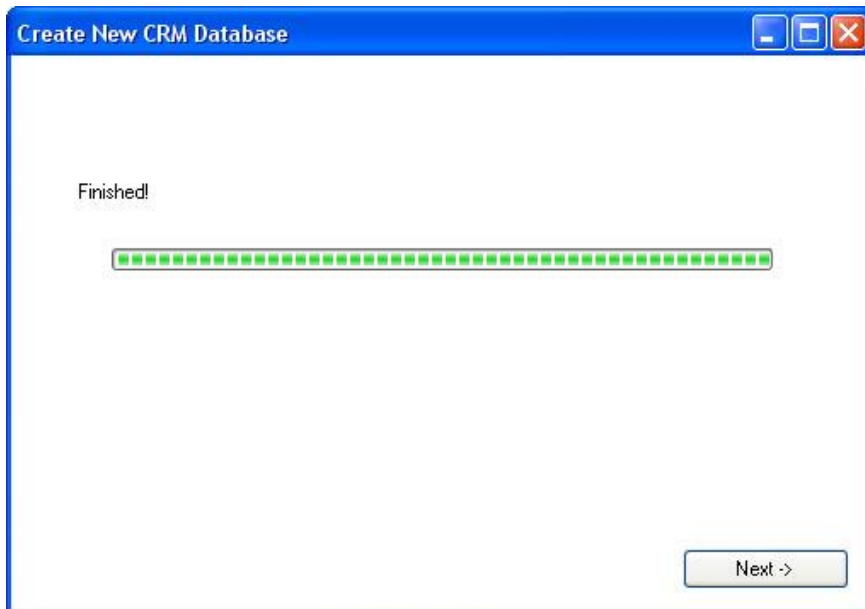
Create New CRM Database

Creating Stored Procedures



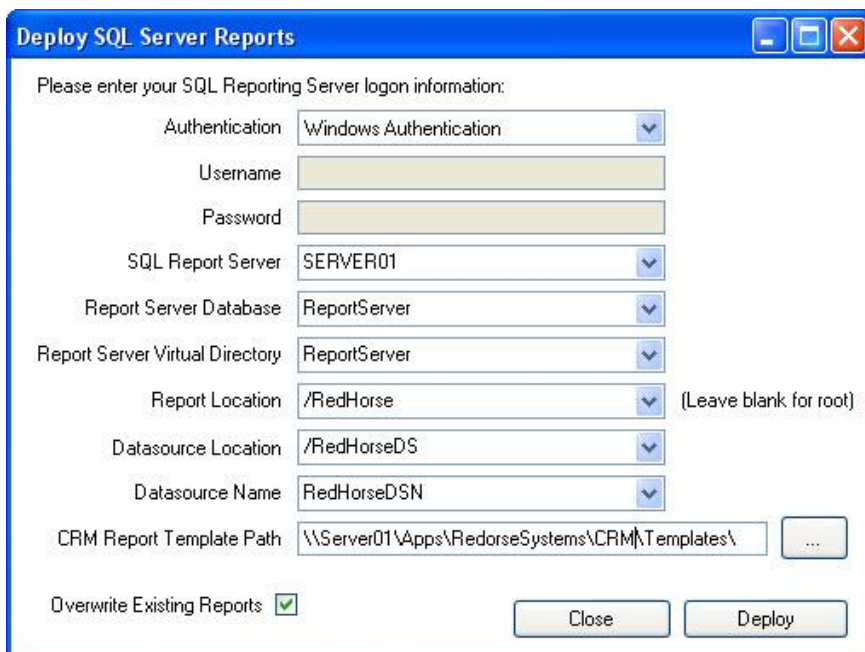
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When the code installation completes, click Next.



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.



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 and 2012, 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 and 2012, 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.

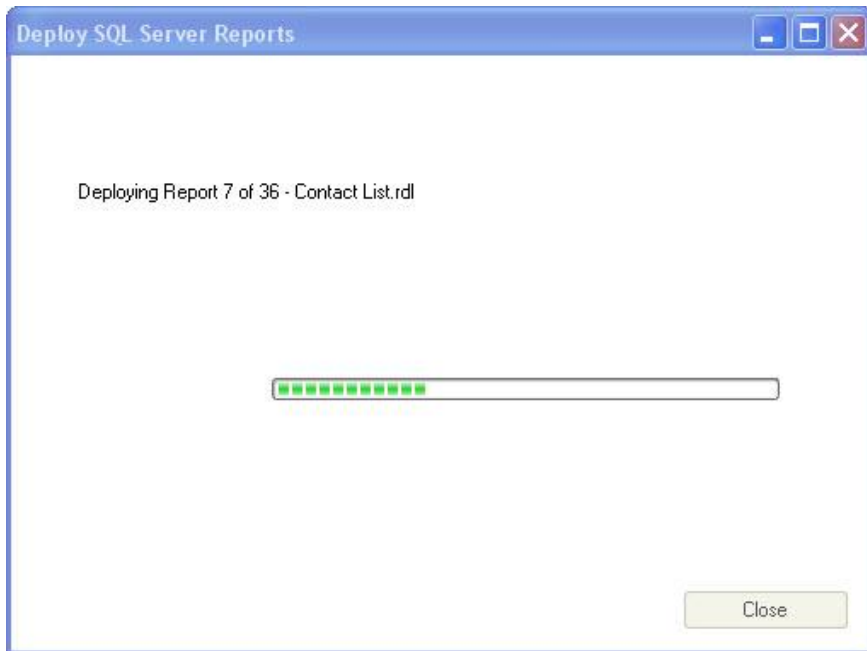
The following parameters are defined by you to help organize CRM reports in the Report Server.

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.

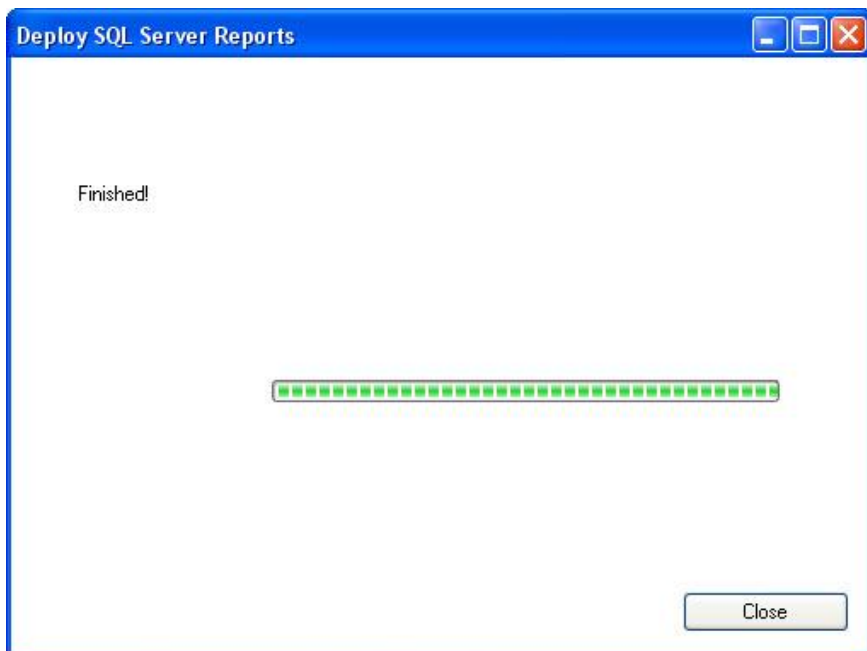
Datasource Location – the virtual directory that will be added to the Report Server Virtual Directory for storing the Datasource name and definition. You can specify the name and the installer will create it for you. Example: /RedHorseDS.

Datasource Name – the name of the datasource that will be used for CRM reports. You can specify the name and the installer will create it for you. Example: RedHorseDSN.

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



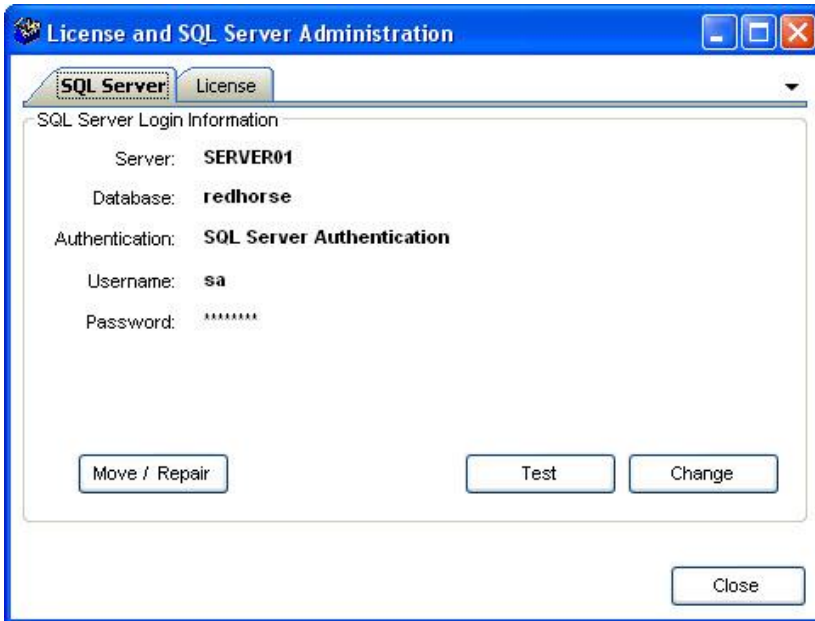
Click Close when the installer finishes.



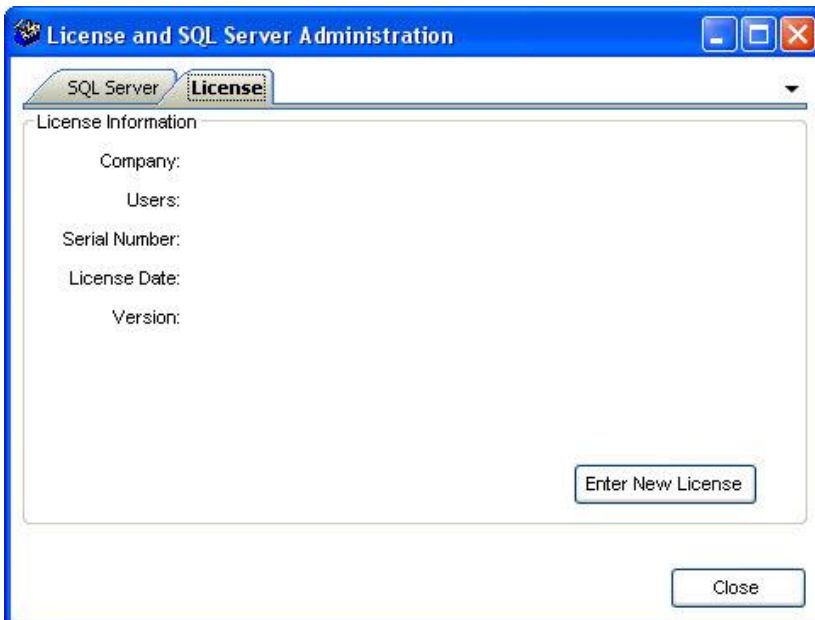
Your installation is now ready to be licensed.

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 may use the Workstation setup on each workstation using the wksetup.exe file located in the RedHorse CRM directory. When running the Workstation setup, you may choose to set up a shortcut on the desktop to run RedHorse CRM and also choose to install the files necessary on the workstation to run the QuickBooks link. To run wksetup.exe, you must first browse to the shared folder where RedHorse is installed and run wksetup.exe from that location. When the installer runs, select a local path to install the workstation files.

If you are not using the QuickBooks integration, you may create a simple shortcut to the CRM.exe file in the shared folder where RedHorse is installed. Workstation setup is only required when running the QuickBooks integration on the workstation.

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: 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.