# INSTALLING AND UPDATING RHGSEngine

This article will walk you thru the process of installing the RHGSEngine: the RedHorse CRM Gmail Sync Engine. It will also walk you thru the process of updating an existing installation.

## Prerequisites

RHGSEngine is compatible with the Standard edition of RedHorse CRM version 4.2 through 6.0. It is also compatible with Complete Edition and Essential Edition version 6.2 and higher.

## Choosing an Installation Location

RHGSEngine is a Windows Service. It can be run on any Windows workstation (XP Pro or higher) or server operating system (Server 2003 or higher) given the correct permissions to run.

It is not necessary to have RHGSEngine installed on the machine where RedHorse CRM is running. It is only necessary to have access to the path (local physical drive or network) where RedHorse CRM is installed.

RHGSEngine can be installed on the server where RedHorse CRM is installed, but if high volume is expected, better performance might be achieved by installing on a dedicated machine.

## Step 1: Run the Installer

Browse to the folder on the server where RedHorse CRM is installed. Do not attempt to run from a mapped drive, as the installer will not be able to start a service in windows to a mapped drive.

Run the file gssetup.exe file that is located in the RedHorse CRM folder. When running on a workstation operating system, it may be necessary to log into the machine as Administrator or select "Run as Administrator" to have proper permissions for installing a service.

## Step 2: Set Service Permissions

RHGSEngine is initially set to log on as the Local System Account. If this account does not have sufficient permissions to start services, this must be changed before you can start the service. In Windows, go to Start, Administrative Tools, Services. Locate RHGSEngine and double click to open the Properties window. Use the Logon tab to set the proper logon for the service.

## Step 3: Start GSManager

When RHGSEngine is installed, a shortcut to GSManager.exe is put into the Startup folder in Windows. When logging into Windows, this tray application will start automatically. To run this application manually, it can be launched from the Start menu. It may be necessary to select to "Run as Administrator" when starting GSManager. This application must have sufficient permissions to start and stop services.

## Step 4: Start the RHGSEngine Service

To start the RHGSEngine service, choose Start when editing the service in Windows Services, or right click the tray application GSManager and choose Start.

## Document Management Path Settings

If you are syncing emails from Gmail to RedHorse, you must configure the RedHorse Document Management Path as a local drive (single user system) or a UNC path (network installation). The login used by the GSEngine service will not have access to the mapped drive and email sync will fail. See this Microsoft Knowledgebase article for more information about services and mapped drives. http://support.microsoft.com/kb/180362

## Updating to a New Version of RHGSEngine

New versions of RHGSEngine are distributed with updates to RedHorse CRM, though all updates to RedHorse CRM might not include a new version of gssetup.exe. After installing an update to RedHorse CRM, a new version of gssetup.exe may be found in the folder where RedHorse CRM is installed. Updating to a new version of RHGSEngine follows the same process outlined above, where you will run the same gssetup.exe that is used for a new installation. You will be reminded by the installer to exit the GSManager tray application prior to installing. You may restart this again manually after the installation completes.

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

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