INSTALLING AND UPDATING RHMGEngine

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

Prerequisites

RHMGEngine is compatible with the Business Manager edition of RedHorse CRM version 7.8 and higher.

You must have a domain for which you can create email addresses and manage the DNS records.

An account must be set up with Mailgun with proper configuration of email DNS records in order to track email opens and clicks.

Creating an Account at Mailgun

Go to www.mailgun.com and sign up for a new account. Enter the required information for a new account. It is recommended that you add payment information when you create the account. Your first 10,000 emails are free every month and unless you go over that amount you will not be billed. But if you do not add a credit card, your logs will only be stored at Mailgun for 2 days. Logs are retained for 30 days only if there is a credit card on account with Mailgun.

Check for an activation email to begin using your account.

You will be taken to a startup page with instructions first to "Try Sending an Email from Your Sandbox Server Now". You can skip this step. Begin with the second step to "Now Add Your Own Domain". You must follow the steps given on the "Verify Your Domain" page. In order to collect click results, you must add DNS records for sending and add DNS records for tracking. Adding DNS records for receiving is optional, however if you have created a subdomain and are not receiving email on this domain, it is recommended that you add this entry in order to achieve better success sending email through Mailgun. Some servers will reject a mail that is sent from a server that does not have corresponding DNS records for receiving mail. RedHorse does not provide further instruction for the DNS entries because they are fully documented and supported by Mailgun.

Once you have created a custom domain, go to your Mailgun dashboard. The message delivery section at the top will be empty because nothing has been sent yet. You should see your custom domain in the next section. At the bottom right of the dashboard overview page, you will see a box titled "API Keys". Use the "Show" link to show the Secret API Key. You will enter that key and your custom domain name into the Admin, Settings, Integrations, Mailgun tab in RedHorse.

RedHorse Systems, Inc.
support@redhorsesystems.com
www.redhorsesystems.com

Configure the remaining settings in the Integrations Admin in RedHorse and then proceed to install the RHMGEngine. For help with these settings, see the RedHorse Admin help file.

Choosing an Installation Location

RHMGEngine 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 RHMGEngine 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.

RHMGEngine 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 mgsetup.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

RHMGEngine 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 RHMGEngine and double click to open the Properties window. Use the Logon tab to set the proper logon for the service.

Step 3: Start MGManager

When RHMGEngine is installed, a shortcut to MGManager.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 MGManager. This application must have sufficient permissions to start and stop services.

Step 4: Start the RHMGEngine Service

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

Updating to a New Version of RHMGEngine

New versions of RHMGEngine are distributed with updates to RedHorse CRM, though all updates to RedHorse CRM might not include a new version of mgsetup.exe. After installing an update to RedHorse CRM, a new version of mgsetup.exe may be found in the folder where RedHorse CRM is installed. Updating to a new version of RHMGEngine follows the same process outlined above, where you will run the same mgsetup.exe that is used for a new installation. You will be reminded by the installer to exit the MGManager 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.

support@redhorsesystems.com

www.redhorsesystems.com