INSTALLING AND UPDATING REDHORSE MOBILE

This article will walk you thru the process of installing RHMobile: the RedHorse CRM Mobile application. It will also walk you thru the process of updating an existing installation.

Prerequisites

RHMobile is compatible with the Essential and Complete Editions of RedHorse CRM version 6.6 and higher.

RHMobile is a web application. It can be hosted on any Windows workstation (XP Pro or higher) or server operating system (Server 2003 or higher) that is capable of running IIS (Internet Information Services).

To run RHMobile, you must have a license for the windows version of RedHorse CRM and a license for RHMobile.

RedHorse CRM must be configured to connect to Microsoft SQL using SQL Authentication. If you try using Windows Authentication, the login used by IIS will be prevented from logging into SQL Server. It is not recommended to add the IIS user as a user in SQL as this will open security holes into your database. SQL Authentication is required.

The server or machine where RHMobile is installed must be able to access FTP at ftp://redhorsesystems.com on port 21 and MySQL on port 3306. The user that IIS uses to run must have file permissions to the path where RHMobile is installed and the path where RedHorse CRM is installed.

Choosing an Installation Location

RHMobile is a web application that is installed in IIS (Internet Information Services).

It is not necessary to have RedHorse CRM running on the machine where RHMobile is installed.

RHMobile 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: Install IIS

IIS must be installed prior to installing RHMobile. Microsoft .NET Framework 4.5 and ASP.NET 4.5 must also be installed on the IIS server.

RHMobile will run in a standard setup of IIS v7. It is an ASP.NET application and can run with standard IIS settings. This document does not include instructions for installing IIS, the .NET Framework or ASP.NET. Please contact your network or IT consultant for instructions on installing these components.

To determine if .NET Framework 4.5 is installed you can check Control Panel, Programs and Features. You can also use this Microsoft article to check the registry for the .NET versions installed.

http://msdn.microsoft.com/en-us/library/hh925568%28v=vs.110%29.aspx

An example screen shot of Sever Roles showing IIS 7 installed in a Windows 2012 R2 Server is below. Your screens may appear different. This is provided as an example only.
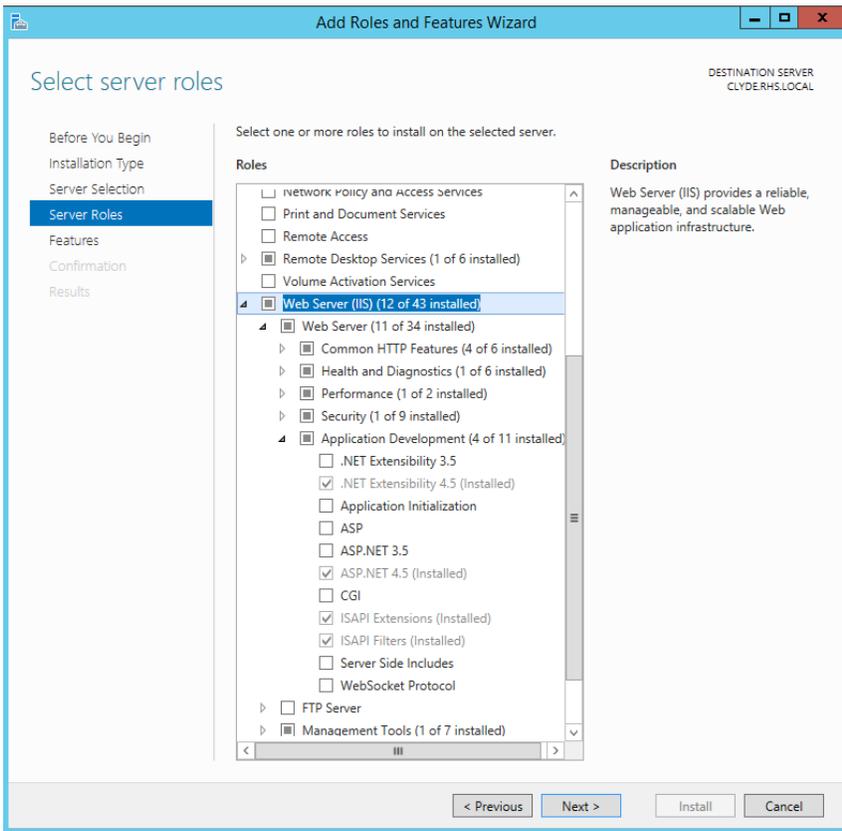
An example screen shot of Server Features showing the .NET Framework 4.5 and ASP.NET 4.5 features installed in a Windows 2012 R2 Server is below. Your screens may appear different. This is provided as an example only.
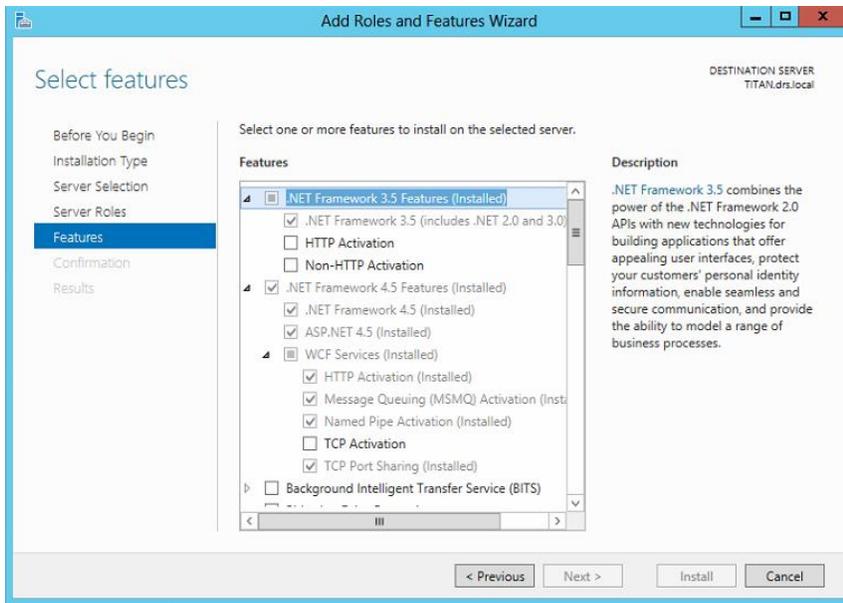
Step 2: Run the Installer

Find the file mobilesetup.exe that is located in the RedHorse CRM folder and run it on the server where IIS is installed. 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 applications in IIS.

In the Installation Folder window, browse to the location where you would like to install RHMobile. The default path is C:\inetpub\wwwroot\RedHorse Mobile. This folder may be changed and this will not affect the application.

During the installation, a dialog will open where you may select the port to be use in IIS to run RHMobile. The default port 8088 but this may be changed if it conflicts with an existing website already set up in IIS.

During the installation, a dialog will open where you must select the path to the network installation of RedHorse CRM. This is used to copy the SQL login credentials that are used by the main RedHorse CRM installation to RHMobile so that mobile users may access the RedHorse CRM database. During a first-time installation, this is required. Skipping this step or failing to provide correct paths will prevent RHMobile from accessing the database. You must do this manually if you do skip this step.

On some workstation operating systems, Windows Installer will not have permission to create the folder and copy the files. In this case it must be done manually. To create the folder, browse to the folder where RHMobile is installed. Create a subfolder called App_Data. This is case sensitive and must match exactly. Then go to the folder where RedHorse CRM is installed. Copy the files setup.cfg and setup.pwd into the App_data folder.

The installer will create a new website application in IIS. Additional IIS setting may be configured directly in IIS after the installation completes.

Step 3: Configure Access

You will need to adjust your firewall rules to allow access on the port where the web application is listening.

This document does not include instructions for configuring routers or firewalls. Please contact your network or IT consultant for instructions on configuring routers or firewalls.

Step 4: Configure Users

You must configure the users that will have access to RHMobile in the main windows application of RedHorse CRM. See the Administration Help file for more information.

Users must be given a URL that points to the port selected in IIS. In order to log into RHMobile on their device, they will use the same username and password to log into RHMobile that they use to log into the main windows application of RedHorse CRM. Mobile users must have a strong password in RedHorse CRM. The requirement for a strong password is a combination of all of these items:

- Uppercase letter

- Lowercase letter

- Number

- Minimum 8 characters

Updating to a New Version of RHMobile

New versions of RHMobile are distributed with updates to RedHorse CRM, though all updates to RedHorse CRM might not include a new version of mobilesetup.exe. After installing an update to RedHorse CRM, a new version of mobilesetup.exe may be found in the folder where RedHorse CRM is installed. Updating to a new version of RHMobile follows the same process outlined above, where you will run the same mobilesetup.exe that is used for a new installation. When updating, it is not necessary to copy the SQL login credential files from the main installation folder. You may skip this step when updating. When updating RHMobile, it is not necessary to restart the application in IIS. This is handled by the installer and IIS automatically when using IIS v7.

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

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