Centric CRM 3.0

Installation and Setup

CENTRICCRM

Introduction

Welcome to the Group Edition of Centric CRM!

The installation, configuration, and upgrade of Centric CRM is intended to be as simple as possible. However, this document assumes that you have a working knowledge of the required applications. Please read the complete instructions for a successful installation and upgrade.

This information is provided to those that have read and agreed to the Centric CRM license agreement.

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Requirements

Pick your software requirements

Centric CRM works on a number of platforms. This means that you can choose what works best for your organization.

Operating System
Linux
Mac OSX
Microsoft Windows
Sun OS

Database Server
PostgreSQL 8.0
PostgreSQL 7.4
Microsoft SQL Server 2000

Application Server + Sun Java VM
Apache Tomcat 5.5 + Java 5.0 JRE
Apache Tomcat 5.0 + Java 1.4 J2SE
Apache Tomcat 4.0 + Java 1.4 J2SE

Pick your hardware requirements

Centric CRM is lightweight. Any server you can buy today is generally more than you'll need. However, configure it based on the needs of your organization. If 100% uptime is required, a second spare server is recommended. If your organization plans to save lots of documents, increase the drive space. The single server can be used for the web server, database server, and mail server.

1-25 Users	26-100	101-250	250 +
733 MHz	1.2 GHz	1.2 GHz (x2)	2.4 GHz (x2)
512 MB	1 GB	1 GB	2 GB
18 GB	36 GB	36 GB	72 GB
RAID	RAID	RAID	RAID

Suggested steps for a successful Linux Installation

Install Java and Tomcat

1. Download and install the Java JRE 5.0 from http://www.java.com

2. Download and install Tomcat 5.5 stable archive from http://jakarta.apache.org/site/downloads/downloads_tomcat-5.cgi

3. Depending on the total memory of your system, typically set Tomcat's memory to half of the server by setting the following environment variable:

   ```
   JAVA_OPTS="-Xms256m -Xmx256m"
   ```

4. Enable software graphics rending, or else Centric CRM will fail, by setting the following environment variable:

   ```
   CATALINA_OPTS=-Djava.awt.headless=true
   ```

5. Download and copy the Centric CRM binary (centric.war) file from http://www.centriccrm.com into Tomcat's "webapps" directory

6. Setup a service to automatically have Tomcat start and stop during startup and shutdown

If you are using PostgreSQL then perform the following additional steps:

1. Verify if PostgreSQL is installed with "psql --version"

2. If your installation does not already have PostgreSQL 7.4 or 8.0, then download and install PostgreSQL 8.0 from http://www.postgresql.org

3. Make sure TCP/IP connections are enabled for localhost in pg_hba.conf

4. Create a "centric_crm" user using "createuser"

5. Create a "centric_crm" database using "createdb -E UNICODE centric_crm"

If you are using Microsoft SQL Server then perform the following additional steps:

1. Install MSSQL, make sure TCP/IP connections are enabled

2. Using Enterprise Manager, create a user named "centric_crm" and remember the password used

3. Using Enterprise Manager, create a database called "centric_crm"

4. Under the database "centric_crm" add the user "centric_crm" with "dbo" permissions

Now that the necessary software and servers are installed, proceed with setting up Centric CRM as follows:

1. Start the Apache Tomcat service

2. Log in to the Centric CRM setup process by using a browser and going to "http://127.0.0.1:8080/centric" (assuming the file installed was centric.war and you are connecting to 127.0.0.1)

3. Follow the on-screen directions and provide the database information when prompted

Additional advanced steps to consider:

1. Change Tomcat port to 80 (must either integrate with Apache Web Server or turn off Apache Web server)

2. Setup database and file library backups

Suggested steps for a successful Mac OSX Installation

Install Tomcat

1. Download and install Tomcat 5.0 stable (not 5.5) archive from http://jakarta.apache.org/site/downloads/downloads_tomcat-5.cgi

2. Depending on the total memory of your system, typically set Tomcat's memory to half of the server by setting the following environment variable:

   ```
   JAVA_OPTS="-Xms256m -Xmx256m"
   ```

3. Download and copy the Centric CRM binary (centric.war) file from http://www.centriccrm.com into Tomcat's "webapps" directory

4. Setup a service to automatically have Tomcat start and stop during startup and shutdown

If you are using PostgreSQL then perform the following additional steps:

1. Either download the PostgreSQL 8.0 Unified Installer from http://www.druware.com/products/postgresql.html or download and install PostgreSQL 8.0 using source code from http://www.postgresql.org

2. Make sure TCP/IP connections are enabled for localhost in pg_hba.conf

3. Create a "centric_crm" user using "createuser"

4. Create a "centric_crm" database using "createdb -E UNICODE centric_crm"

If you are using Microsoft SQL Server then perform the following additional steps:

1. Install MSSQL, make sure TCP/IP connections are enabled

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3. Follow the on-screen directions and provide the database information when prompted

Additional advanced steps to consider:

1. Change Tomcat port to 80 (must either integrate with Apache Web Server or turn off Apache Web server)

2. Setup database and file library backups

Suggested steps for a successful Windows Installation

Install Java and Tomcat

1. Download and install the Java JRE 5.0 from http://www.java.com

2. Download and install Tomcat 5.5 stable binary (exe) from http://jakarta.apache.org/site/downloads/downloads_tomcat-5.cgi, depending on the total memory of your system, typically set Tomcat's memory to half of the server using Tomcat's configuration editor

3. Using the Windows Services Control Panel, stop the "Apache Tomcat" service

4. Download and copy the Centric CRM binary (centric.war) file from http://www.centriccrm.com into Tomcat's "webapps" directory -- usually located in "C:\Program Files\Apache Software\Tomcat\webapps"

If you are using PostgreSQL then perform the following additional steps:

1. Create a Windows user on the system named "postgres" (normal user, non-administrator) and remember the password used

2. Download and install PostgreSQL 8.0 Windows binary (.exe) from http://www.postgresql.org

3. During the installation, make sure to create a postgres database user named "centric_crm" and remember the password used

4. Using the Application "PgAdmin III," which was installed with PostgreSQL, login to the database server and create a new database called "centric_crm" with UNICODE setting

If you are using Microsoft SQL Server then perform the following additional steps:

1. Install MSSQL, make sure TCP/IP connections are enabled

2. Using Enterprise Manager, create a user named "centric_crm" and remember the password used

3. Using Enterprise Manager, create a database called "centric_crm"

4. Under the database "centric_crm" add the user "centric_crm" with "dbo" permissions

Now that the necessary software and servers are installed, proceed with setting up Centric CRM as follows:

1. Start the Apache Tomcat service

2. Log in to the Centric CRM setup process by using a browser and going to "http://127.0.0.1:8080/centric" (assuming the file installed was centric.war and you are connecting to 127.0.0.1)

3. Follow the on-screen directions and provide the database information when prompted

Additional advanced steps to consider:

1. Change Tomcat port to 80 (must either integrate with IIS or turn off IIS web server)

2. Setup database and file library backups

Upgrade Procedure

Currently using Centric CRM 2.9 or 2.8?

Upgrading from a previous version of Centric CRM has been designed to be as simple as possible. All of your previous Centric CRM configuration information is saved in the file library, which, by default, is not in the same path as the webapp, so your information will be preserved.

Please review all upgrade steps to ensure that the upgrade goes as planned. You will most likely want to avoid down-time for your users. The upgrade process can be completed in under 10 minutes if you are prepared and everything goes well.

IMPORTANT: Make sure to backup the Centric CRM database and file library before continuing with the upgrade. The upgrade process will make irreversible changes to your database, unless you have a backup.

1. Backup the centric_crm or darkhorse_crm database -- you can restore this database if a problem occurs during upgrade
2. Backup the file library, specified during application installation
3. Shutdown the Apache Tomcat web application server
4. Backup the existing Apache Tomcat webapps/centric.war or webapps/darkhorsecrm.war file -- you can restore this WAR if a problem occurs during upgrade
5. Delete the existing Apache Tomcat webapps/centric directory (or webapps/darkhorsecrm)
6. Copy the centric.war file into Tomcat's webapps folder, overwriting the existing centric.war file or darkhorsecrm.war file -- replacing the existing file is important
7. Startup the Apache Tomcat web application server
8. Login to Centric CRM to perform additional upgrade steps

Once the Centric CRM application has started, and you are able to connect with a web browser, you will be prompted with a page indicating that the application has detected an out-of-date database. Follow the on-screen instructions to finalize the upgrade.

NOTE: Until an administrator logs into Centric CRM and confirms the upgrade, users will not be able to login.

NOTE: If any problems occur during the upgrade, a detailed report is generated in the Apache Tomcat log file which can be used to further identify the problem. Make sure you have a backup!

PostgreSQL 7.3 no longer supported. No problem.

We do our best to work with older versions of software, but we've moved on from PostgreSQL 7.3. Before following these steps, make sure your installation of PostgreSQL 7.3 is not required for other applications in your organization. These steps are based on a Linux install.

1. Backup your current databases. You can use "pg_dumpall > db_backup.sql"

2. Download and install PostgreSQL 8.0 from http://www.postgresql.org

3. Start PostgreSQL, you should get a warning that your existing 7.3 database is still in place. Move it, then start PostgreSQL again to initialize an empty database.

4. Login as the "postgres" user and restore your database using "psql template1 -f db_backup.sql"

5. Make sure TCP/IP connections are enabled for localhost in pg_hba.conf and restart postgresql

6. Continue with the Centric CRM upgrade

Post-Installation Setup

Once Centric CRM is setup and you are able to login with administrator access, there are several items that should be configured before users generally begin to use the system in a production environment.

NOTE: Even though Centric CRM is preloaded with defaults for every module, integrating Centric CRM into your existing company's workflow means collaboration with Sales, Marketing, and other departments.

Configuration can be completed by accessing the Admin tab of the application, then choosing to configure modules, roles, and users.

Configure Lookup Lists

Lookup lists are the drop-down menu choices that appear when adding data in each module. Review each drop-down to understand its use. Values can be added, renamed, and removed at any time.

Configure Custom Folders and Fields

This editor allows you to create custom forms that can be attached to Contacts, Accounts, Employees and Tickets using arbitrary fields.

Configure Roles and Permissions

Centric CRM is preloaded with roles that can be renamed and modified depending on the size and shape of your company. Roles allow you to quickly categorize users with access permissions. Review the existing roles and determine if that user group will need Access/View/Add/Edit/Delete permissions for the specified feature.

NOTE: After an upgrade be sure to modify your roles to include new features.

Add Users

Each user must be a contact in the system, typically listed in the Employees module. You can easily create a new employee when adding new users by choosing the [Create Contact] on the Add User page.

Questions

For additional information, support, or training, visit http://www.centriccrm.com for details. You will also find product FAQs and announcements.

Known Issues

While Centric CRM is written in pure Java, it may not be compatible with other application servers. The following issues are known:

1. JBoss should work if the .war is extracted first into a directory, then deployed

2. Weblogic will not work