

# Randr, Inc. Salesportal Installation Guide

1. Download the Project
  1. DB Scripts
  2. WAR file
  3. Source File
2. Create Sales Portal DB
  1. Requires Postgres DB named salesportal
  2. To create a Postgres data base:
    1. go into postgres
    2. click on create a database
    3. give it the name salesportal
3. Run the data base creation scripts
  1. DB creation scripts are located inside the project in Web Content/db\_scripts
  2. There are 4 scripts to be run. They are labeled 1\_, 2\_,3\_,4\_ and should be run in that order.
  3. They are:
    1. 1\_table\_script.sql – this creates the tables inside salesportal database
    2. 2\_alter\_script.sql – this adds constraints to the tables.
    3. 3\_index\_script.sql – this adds indexes to the tables.
    4. 4\_initial\_data\_script.sql – this loads up the initial data into the tables.
1. Deploy WAR file through Tomcat
  1. Change name of war file from “salesportal-xyz-1.1.4.war” to “salesportal.war”
  2. Upload war file into tomcat folder
  3. restart tomcat or start the application.
5. Change DB IP address – if the application and data base are NOT on the same server, you will have to change the `<db_system_ip>`
  1. the db IP address is located in the appConfig.xml file
  2. Web Content
    1. xml\_config
      1. appConfig.xml
  3. Change `<db_system_ip>` from localhost to the correct IP address (only necessary if the application and database are NOT deployed on the same server)
6. Start setting up the Sales Portal configurations:
  1. The application will be located at :
    1. <http://youripaddress:8080/salesportal/home>
  2. The initial sign on user is **admin** the initial password is **admin**
  3. User admin has the menu options for for administration and admin/config.  
Please refer to the Administration Manual for details on each option.
    1. Company – change the default company name to your company.
    2. Salesman – create salesman
    3. Territory – territories are used to group prospects and customers. A Territory must be linked to a salesman
    4. User defined codes – these allows you to classify, sort and select customers and

## **Randr, Inc. Salesportal Installation Guide**

prospects:

1. Line of Business
2. Status Code
3. System Type
4. Software Type
7. Setup Admin Configuration
  1. This contains application setup parameters including email server for sending Next Sales Actions emails. - see the Administration Documentation for details.
8. Change the Logo to your own logo.
  1. The logo is located in the graphics folders and is called logo.gif
  2. This can be replaced with your own logo.
  3. 104 pixels height, 144 pixels length fits well
9. Data Conversion – the Salesportal data base of prospects and customers can be loaded from a CSV file.
  1. Create a CSV file of the data
    1. Open Office Calc and Excel allow you to save data into CSV format.
  2. The CSV file can be updated from the administration menu, Import Data Option– see the Administration Documentation for details.
    1. The layout of the CSV file is listed on the Import Data Option. Make sure commas are removed from inside fields such as name and address:
    2. CSV File Layout: 1(A) - Company, 2(B) - Contact, 3(C) - Address 1, 4(D) - Address 2, 5(E) - City, 6(F) - State, 7(G) - Zip, 8(H) - ID, 9(I) - Phone, 10(J) - Fax, 11(K) – Title, 12(L) - System, 13(M) - SIC, 14(N) - Size, 15(O) - Verified, 16(P) - Software, 17(Q) -LOB, 18(R) - Website, 19(S) - Email, 20(T) - County, 21(U) - Territory

*Note, since this is a comma separated file, make sure you scan your data and replace all commas with a blank or other character before uploading. Upload size limited is about 10,000 records per upload.*

  3. Review your data thru the application
  4. Removing the imported data. If there is a problem with your upload. You can use the Delete Imported Data option to remove all data imported on a specific date.
10. Information Page – the Information page allows you to create a page with information for your sales force and system users. It can also contain web links.
  1. The Information page is located in webpages and is called info.html. This can be replaced with your own custom page, but needs to have info.html as the name.
11. Security

### **Requirements**

1. Postgres 7.3 or greater
2. Application Server:
  1. Tomcat 4.1 for the Sales Portal Tomcat4 version
  2. Tomcat5 or Geronimo for Sales Portal Tomcat5 Geronimo version
3. Web browser tested with IE or Firefox