

INSTALLING REDHORSE CRM

This article will walk you thru the process to install RedHorse CRM.

Step 1: Download the Latest Version

You should have received a logon for the website that gives you access to the Downloads page. If you did not, please contact support@redhorsesystems.com.

Visit www.redhorsesystems.com and log into the website with the username and password provided to you by support. Use the main website navigation bar to go to the Updates page. Click the download link and save the file to your computer.

Step 2: Run the Installer

Run the setup.exe file that you downloaded.

In the installer, browse to the location where you would like to install RedHorse CRM. The default path is c:\Program Files\RedHorse Systems\CRM. If you are going to be running RedHorse CRM on workstations connecting to a network, you should change the installation path to a shared network location on your server.

Select the Full Install setup type.

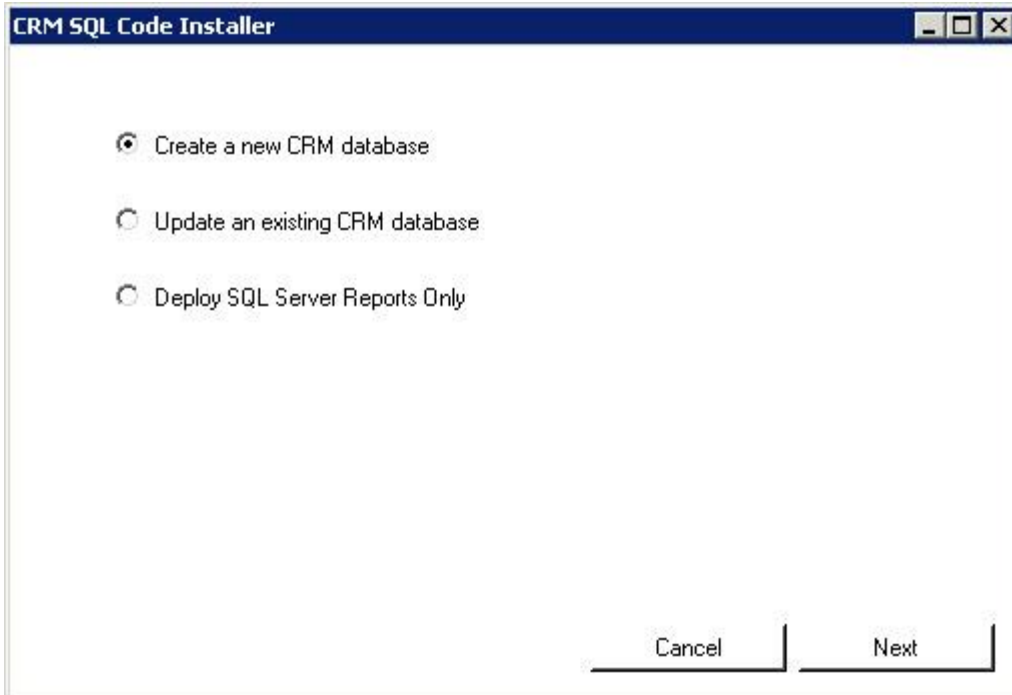
Click Install.

When the installation completes, click Finish. This will launch the SQL Code Installer.

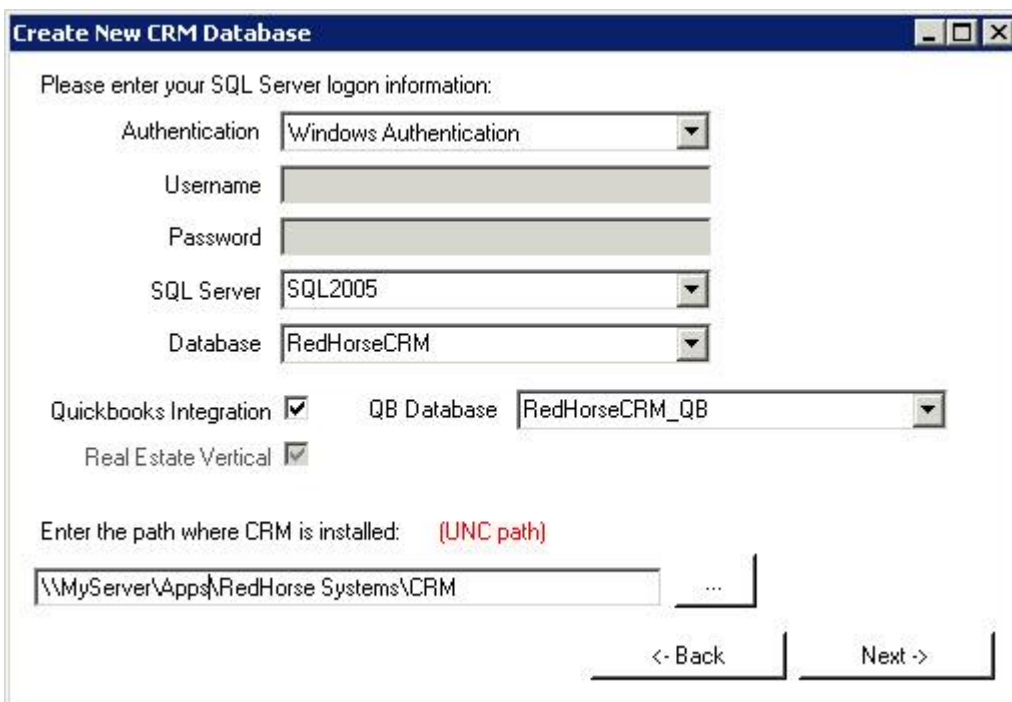
Step 3: Run the SQL Code Installer

When the main installer finishes, the SQL Code Installer will automatically launch. This installer may also be launched manually from the path where RedHorse CRM is installed. The file is called SQL.exe.

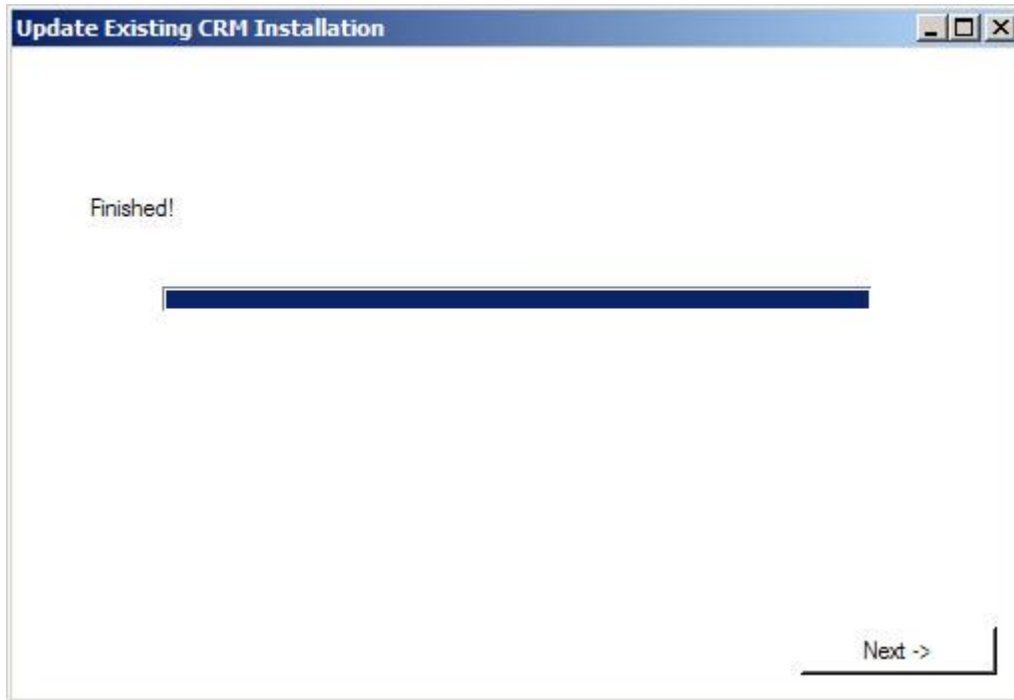
Select Create a New CRM database and click Next.



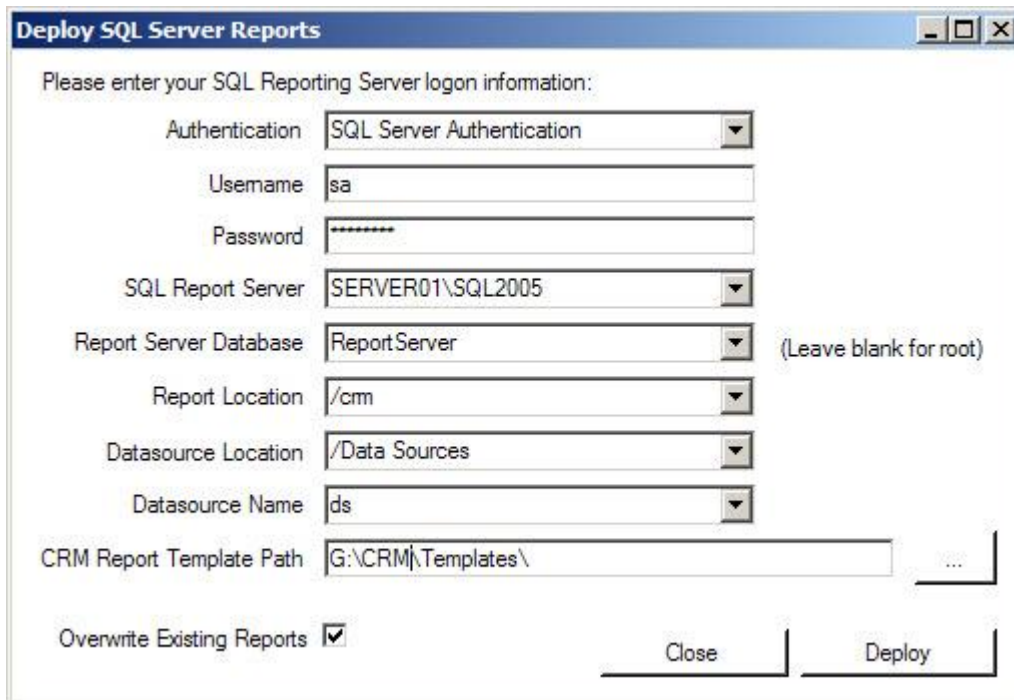
Enter the logon information for your SQL Server. Check “QuickBooks Integration” or “Real Estate Vertical”, if appropriate for your installation. These options are not available together. You must use a UNC path to the location where CRM is located for this portion of the installation process. Click Next.



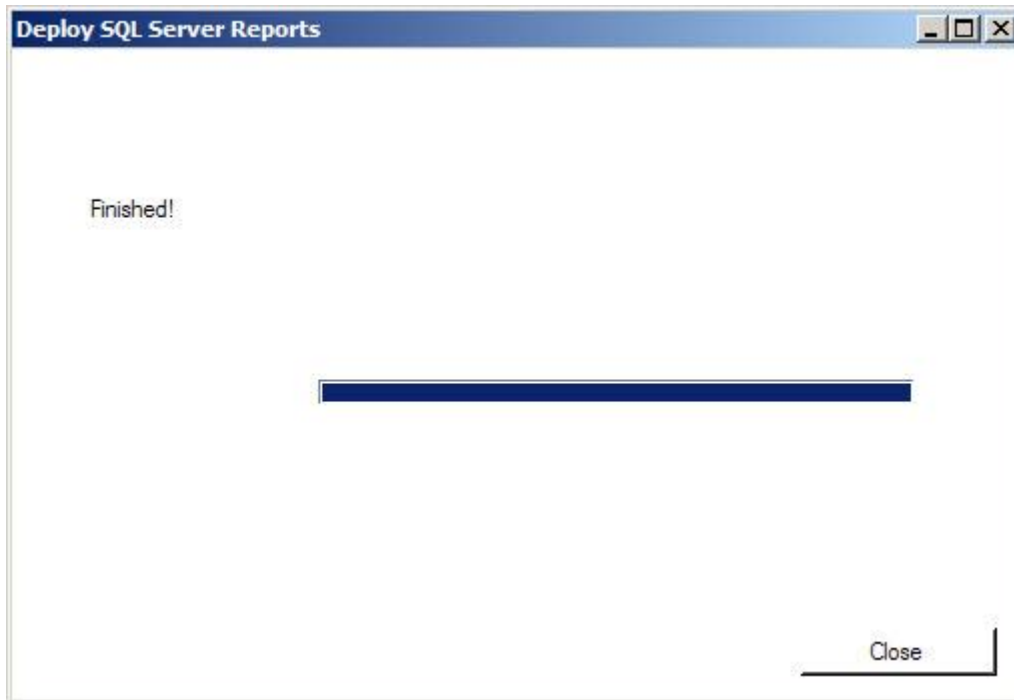
When the code installation completes, click Next.



If you are using SQL Reporting Services and would like to install the standard system SQL reports, enter SQL Reporting Services logon information. Click Deploy to begin.



Click Close when the installer finishes.



Your installation will ready. If you will be running RedHorse CRM on workstations connecting to a network, you should proceed to each workstation and run the Workstation setup using the wksetup.exe file located in the RedHorse CRM directory. See separate instructions.

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

support@redhorsesystems.com

www.redhorsesystems.com