

# SplendidCRM

## Deployment Guide



**Version 5.x**

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**Category: Deployment**

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# SplendidCRM Deployment Guide

## Introduction

This document guides you through the deployment of SplendidCRM. It contains the following sections:

- **Overview of SplendidCRM**, which explains how the Open-Source Edition varies from the Professional Edition.
- **Infrastructure Requirements** explains the necessary prerequisites for installing SplendidCRM.
- **Overview of the Deployment Process** guides you through the high-level deployment steps.
- **Deploying SplendidCRM** guides you through the process of deploying a SplendidCRM.
- **Configuring SplendidCRM** explains how to configure your SplendidCRM by using the SplendidCRM administrative interfaces.
- **Removing SplendidCRM** describes deactivating and removing the SplendidCRM from your IT infrastructure.
- **Appendix A: Attaching to SQL Server 2005 or SQL Server 2008** explains how to attach the SplendidCRM database to an existing SQL Server installation.
- **Appendix B: Manually installing IIS** explains how to manually install Internet Information Services (IIS).
- **Appendix C: Additional Resources** contains links to additional supporting documentation.



## Overview of SplendidCRM

SplendidCRM offers an Open-Source Edition and a Professional Edition.

- **SplendidCRM Community Edition** is designed for use in small- or medium-sized organizations to support a maximum of 100 users. This server is a standalone server with a local SQL Server Express database that stores user data. The SplendidCRM Open-Source Edition includes the C# and ASP.NET source code, but it does not include the source code for the SQL Functions, Procedures or Views.
- **SplendidCRM Professional Edition** is designed for use in midsized organizations that intend to integrate SplendidCRM into their existing applications. It is intended for medium deployments supporting up to 500 users. In a Professional deployment, one or more installations can be load balanced and share a central Microsoft SQL Server™ database that stores data. The SplendidCRM Professional Edition includes the C# and ASP.NET source code as well as the source code for the SQL Functions, Procedures or Views.
- **SplendidCRM Enterprise Edition** is designed for use in larger organizations that intend to integrate SplendidCRM into their existing applications. It is intended for large-scale deployments supporting up to 1,000 users. In a Enterprise deployment, one or more installations can be load balanced and share a central Microsoft SQL Server™ database that stores data. The SplendidCRM Enterprise Edition includes the C# and ASP.NET source code as well as the source code for the SQL Functions, Procedures or Views.



## Infrastructure Requirements

Before you install SplendidCRM, ensure that your environment meets the following prerequisites:

All of the following servers are supported by SplendidCRM:

- Windows Server 2003, Web / Standard / Enterprise Edition 32-bit & 64-bit
- Windows Server 2008, Web / Standard / Enterprise Edition 32-bit & 64-bit
- Windows Server 2008 R2, Web / Standard / Enterprise Edition 32-bit & 64-bit

Desktop operating systems are supported, but we recommend that you use them only to evaluate SplendidCRM and not to use a desktop operating system in a production environment unless you are only supporting a handful of users.

- Windows 7, Home / Professional / Enterprise / Ultimate Edition 32-bit & 64-bit
- Windows Vista, Home / Professional / Enterprise / Ultimate Edition 32-bit & 64-bit
- Windows XP SP2, Home / Professional / Enterprise Edition 32-bit & 64-bit

SplendidCRM requires Internet Information Server (IIS). IIS is included in all Microsoft's operating systems, but you may need your original disk to make certain that it gets installed during the SplendidCRM installation process.

SplendidCRM supports most versions of the SQL Server database, including the following:

- SQL Server 2005 Express / Standard / Enterprise 32-bit & 64-bit
- SQL Server 2008 Express / Standard / Enterprise 32-bit & 64-bit
- SQL Server 2008 R2 Express / Standard / Enterprise 32-bit & 64-bit

A SQL Server Express instance is installed by Setup on the server that will host SplendidCRM. Alternatively, a SQL Server administrator can skip the SQL Server Express installation and manually attach the provided database files to their preferred SQL Server instance.



## Deploying SplendidCRM

### Overview of Procedures for Deployment

This section provides step-by-step instructions for deploying SplendidCRM by using Setup.exe. To ease the process, Setup explains tasks, provides tips about permissions and prerequisites, includes warnings, and uses task wizards to lead you through each step.

Table 1 lists the procedures involved in the deployment of SplendidCRM.

Table 1 Deploying SplendidCRM

Task	Required	Description	Administrative Credentials
Install .NET Framework 3.5 SP1.	Yes	Installs .NET 3.5 SP1 if not already installed. <i>Note:</i> .NET is not included in the Setup application, but will be download as needed. Therefore, the computer must have Internet access. .NET is included in Windows Server 2003.	Local Administrator
Install the SQL Server Express instance.	Yes. Setup automatically creates the SQL Server Express instance.	Installs the SQL Server Express database instance on (local)\SplendidCRM.	Local Administrator
Install files for SplendidCRM.	Yes	Installs files and register SplendidCRM application with the IIS web server.	Local Administrator
Launch SplendidCRM.	No	Launches the homepage of SplendidCRM. <i>Note:</i> By default, SplendidCRM uses Windows Authentication. Users are automatically added the first time they navigate to the SplendidCRM server. Users that are part of the Windows Domain Admins group or part of the local Administrators group are added as SplendidCRM administrators.	Local Administrator
Precompile the site	No	To help increase performance, the Setup can precompile core pages. These pages are normally compiled on-demand, but this can lead to a few second delay.	Local Administrator

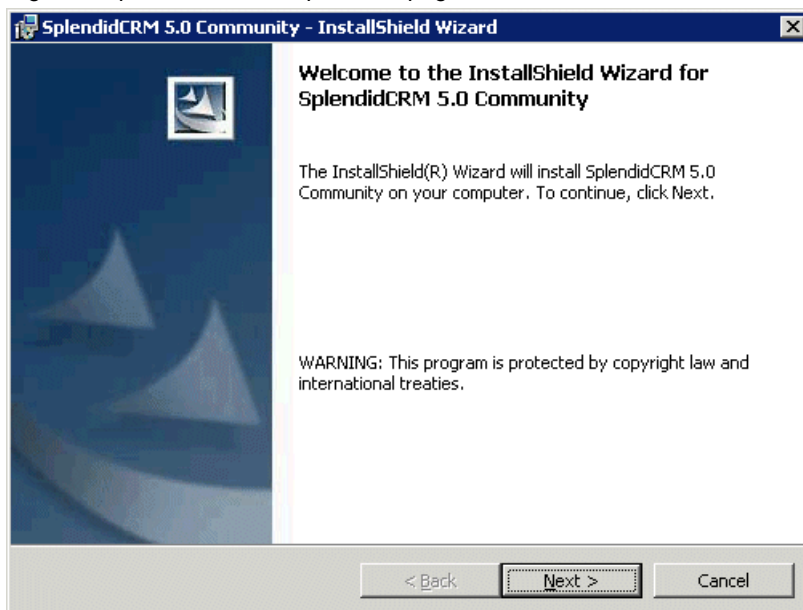


## Installing SplendidCRM

### Installing Files for SplendidCRM

1. Log on to the computer where you want to deploy your SplendidCRM by using local administrator or equivalent permissions.
2. On the SplendidCRM install folder or CD, run Setup.exe to open the Deployment Tool.

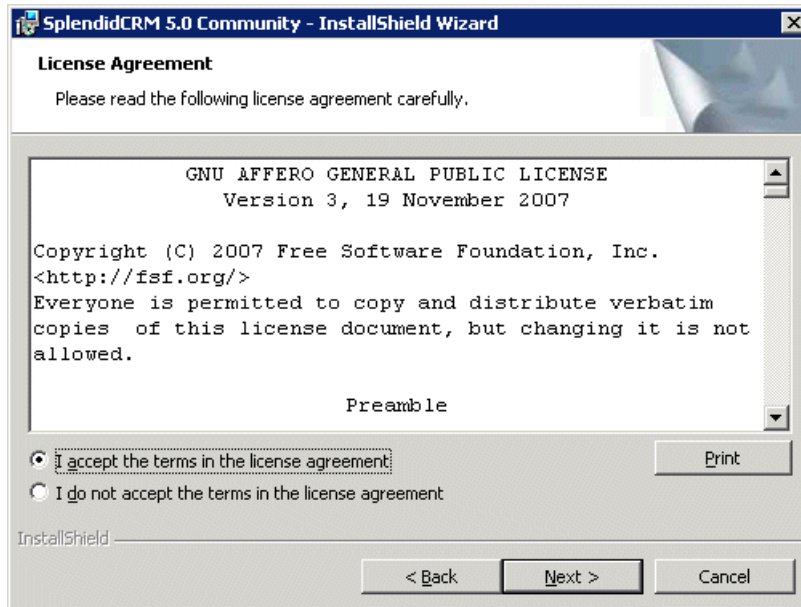
Figure 1 SplendidCRM Setup Wizard page





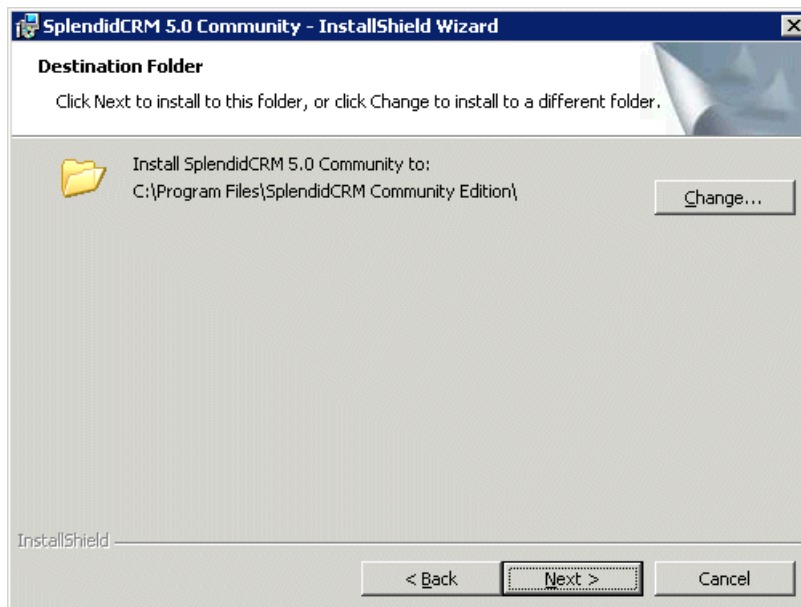
3. On the **License Agreement** page, read the license agreement, and if you agree, click the **I accept the terms in the license agreement** option, and click **Next**.

Figure 2 License Agreement page



4. You may install SplendidCRM in any folder, but the recommended location is C:\Program Files\SplendidCRM Software.

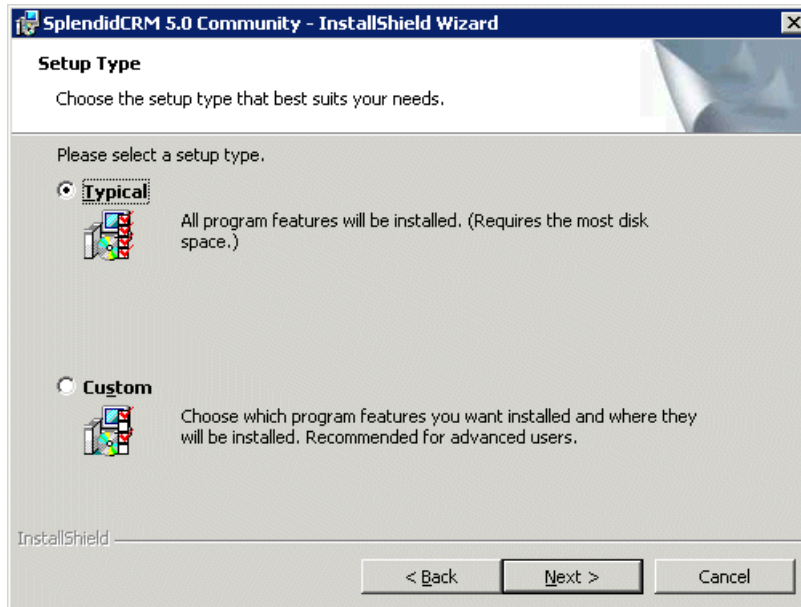
Figure 3 Destination Folder page





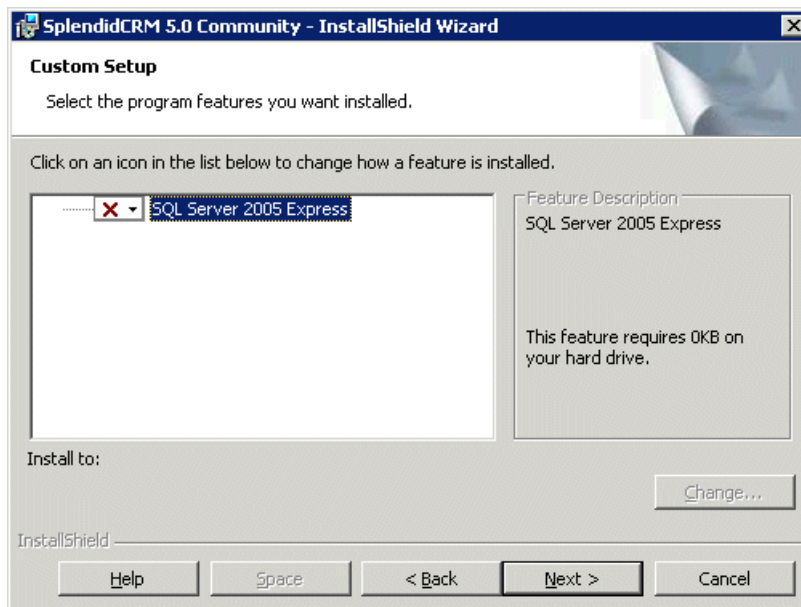
5. On the **Setup Type** page you can choose a **Typical** install or a **Custom** install. The Custom install allows you to disable the SQL Server Express installation.

Figure 4 Setup Type



6. On the **Custom Setup** page, you may opt to disable the install of **SQL Server Express**, and click **Next**. Please refer to **Appendix A** for instructions on how to connect to an alternative database.

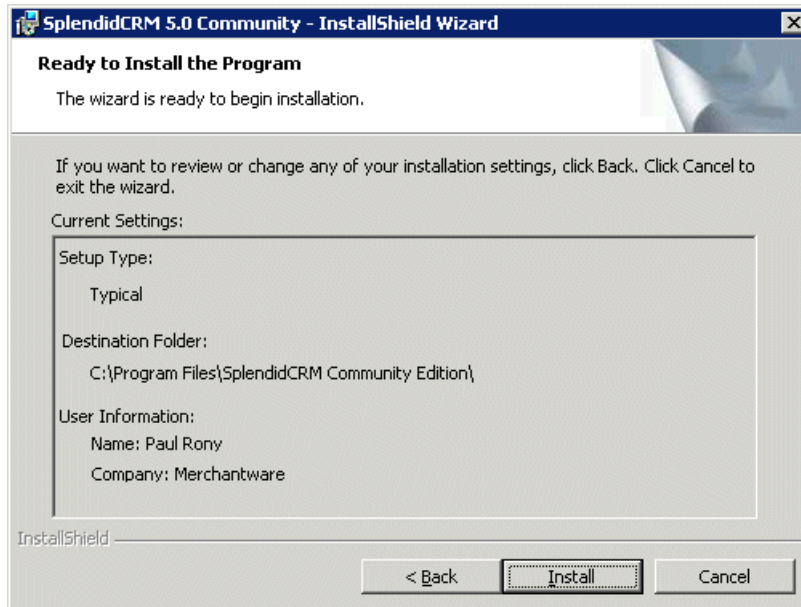
Figure 5 Choose to disable SQL Server Express





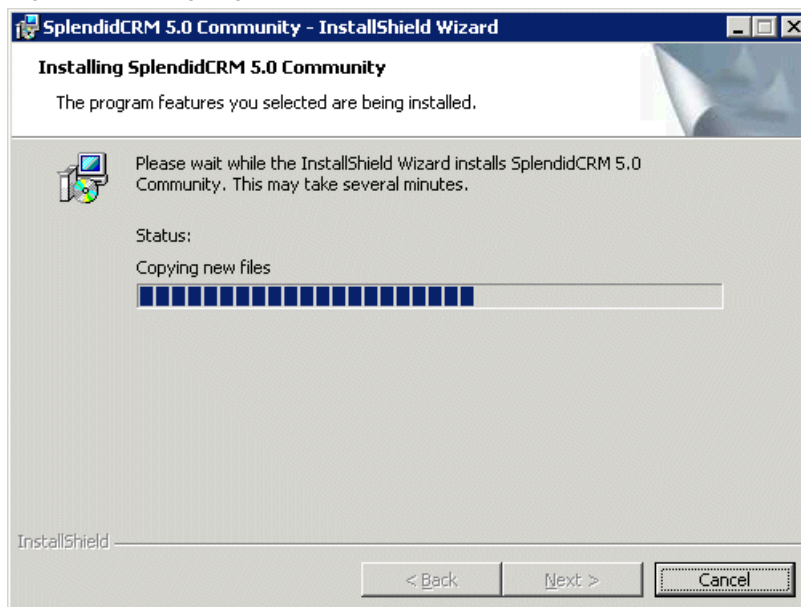
7. On the **Ready to Install the Program** page, review the settings and click **Install** to proceed. Click **Back** to make changes to the settings.

Figure 6 Ready to Install the Program page



8. Setup will provide a progress indicator.

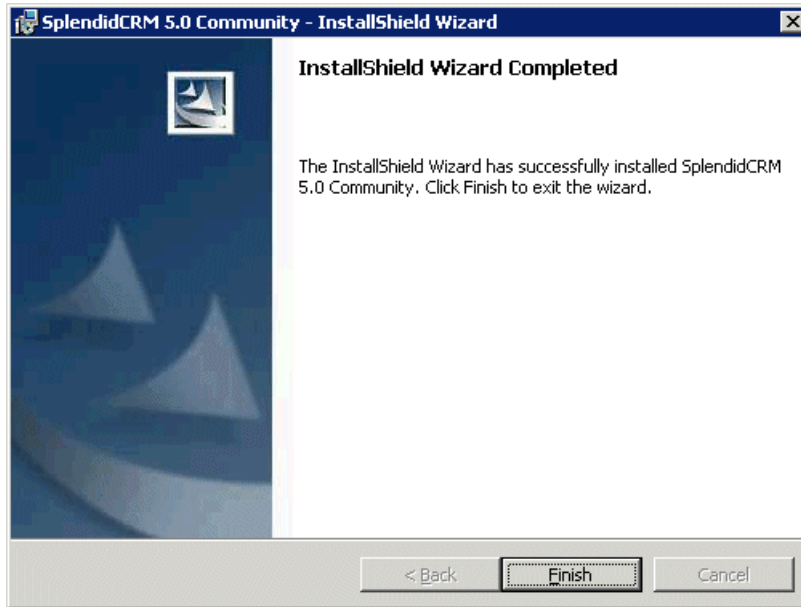
Figure 7 Installing page





9. On the **Setup Wizard Completed** page, click **Finish**. At this stage, the installation is not complete. All of the files have been installed, but you must run the SplendidCRM Configuration Wizard to configure IIS and install SQL Server Express.

Figure 8 Completed page

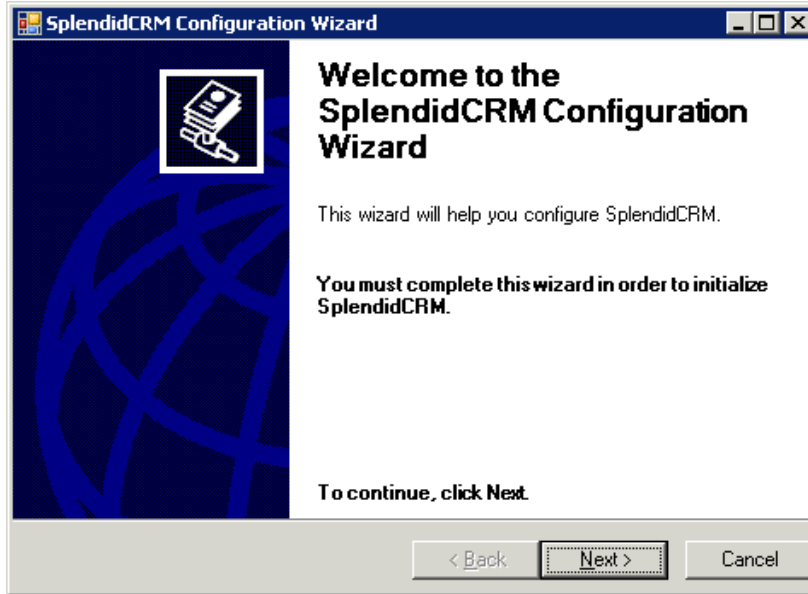




### Installing Services and Configuring SplendidCRM

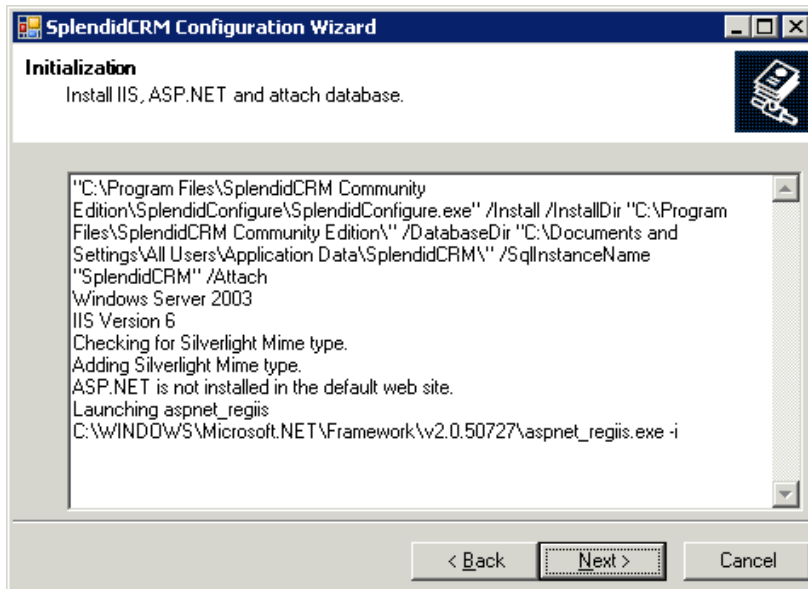
1. The SplendidCRM Configuration Wizard will install IIS, install SQL Server Express, attach the database, update the database and precompile the web site.

Figure 9 SplendidCRM Configuration Wizard



2. SplendidCRM requires Internet Information Services (IIS). Please refer to Appendix B for instructions on installing IIS manually. If IIS is not installed, you will need your operating system installation disk.

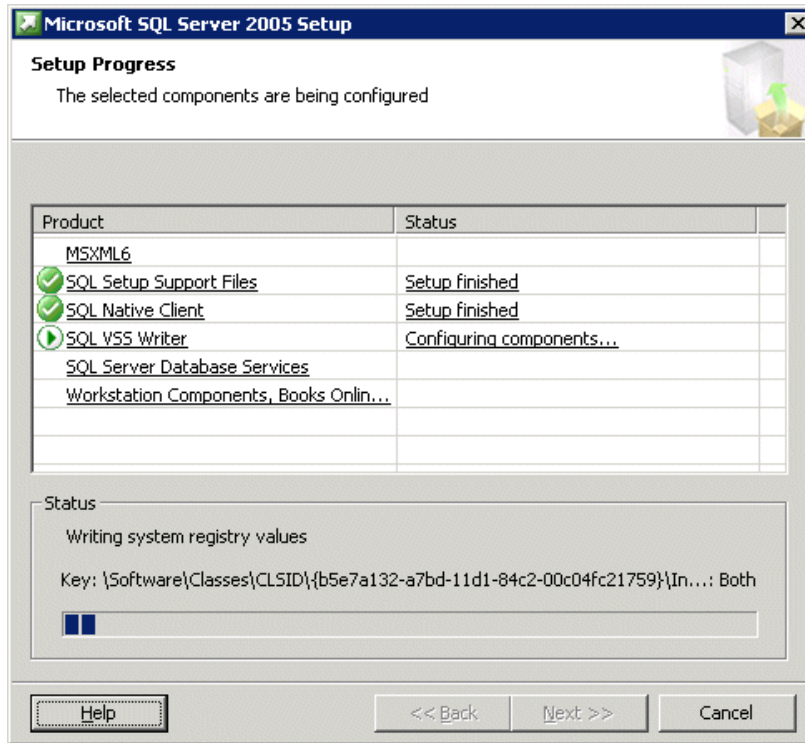
Figure 10 Installation of IIS





3. The SQL Server Express setup will provide a separate progress dialog. (If you have selected a Custom install or you are installing an update, then the SQL Server setup will be skipped.)

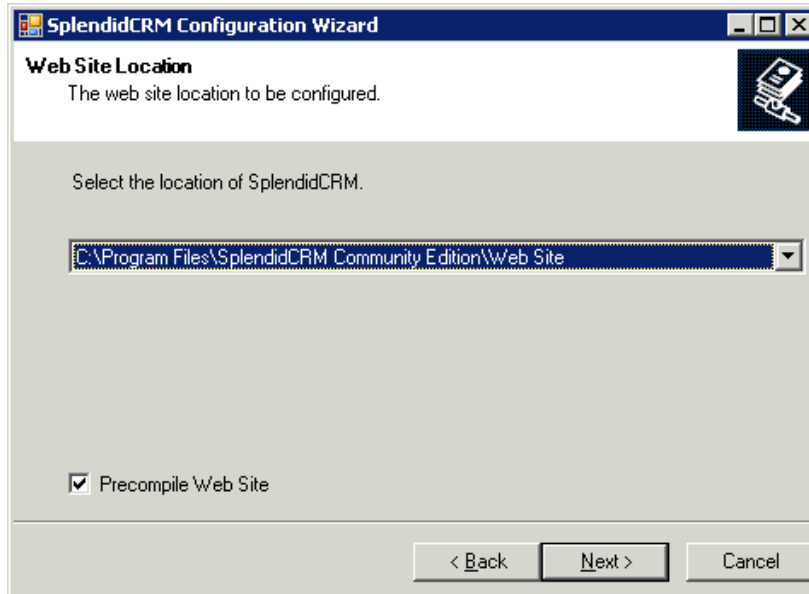
Figure 11 Installation of SQL Server Express





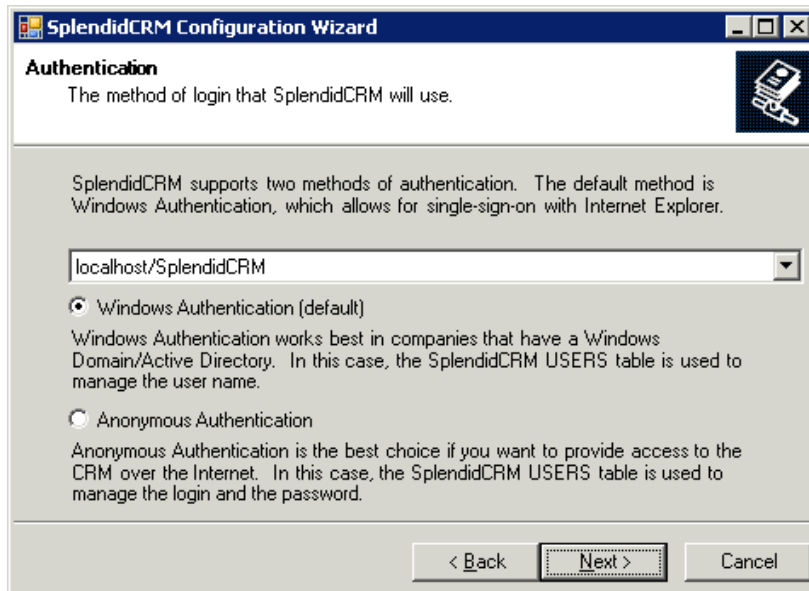
4. If you have multiple SplendidCRM installations, you can select the specific installation that you want to configure. You can also decide if you want to precompile the web site. Precompiling the site will make the site fast, but it is optional because .NET will automatically compile the site as needed.

Figure 12 Web Site Location



5. We generally recommend that you use Windows Authentication so that SplendidCRM can automatically login the users. However, you may want to select Anonymous Authentication if you want to have SplendidCRM maintain users and passwords. If you select Anonymous Authentication, the default login will be "admin" and the default password will also be "admin".

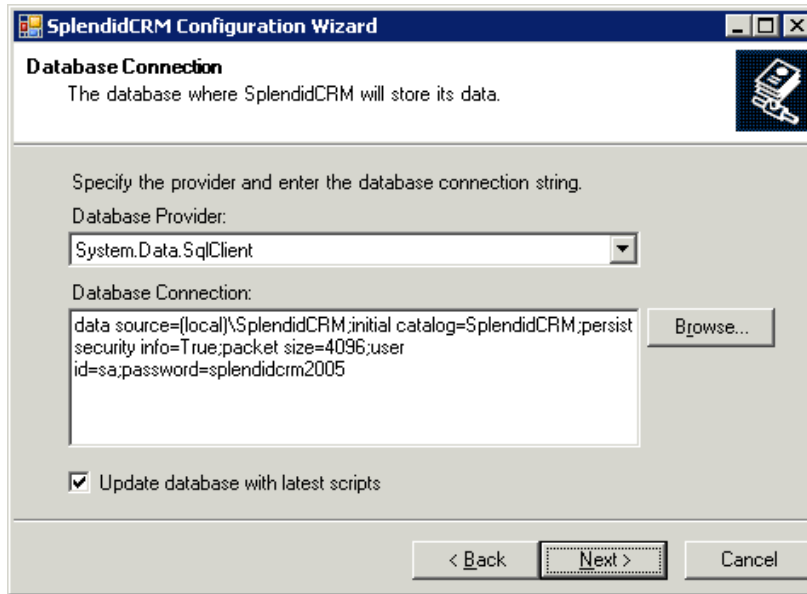
Figure 13 Authentication





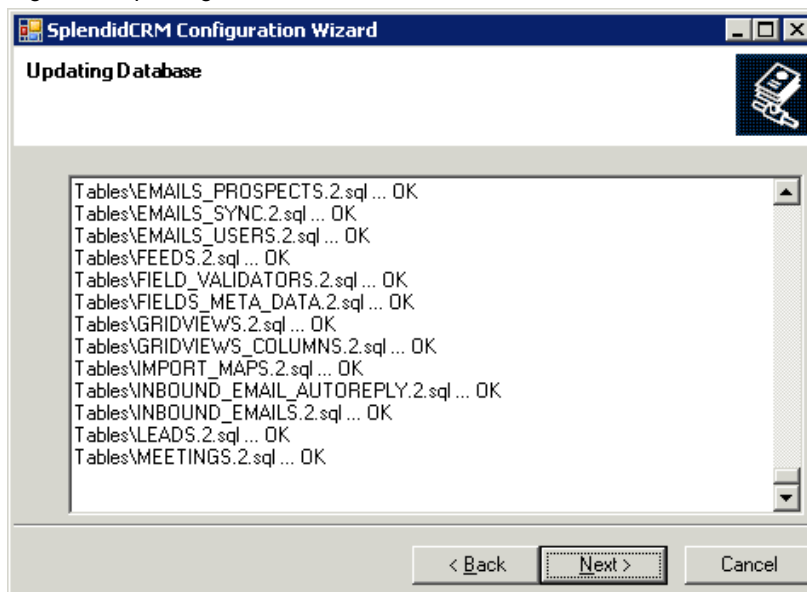
- The database connection dialog is where you would specify an alternate database location if you chose not to install SQL Server Express. Please keep in mind that if you select an alternate database server, that you will have to manually create the SplendidCRM database on that server and you will have to provide a login with ownership rights.

Figure 14 Database Connection



- Updating the database is a critical step in the installation process. If you encounter any errors on this page, please report them to SplendidCRM Software.

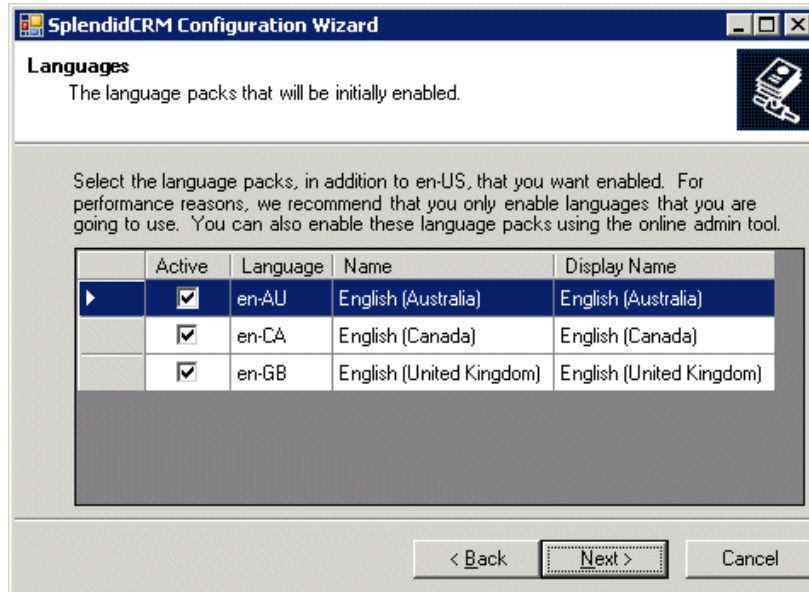
Figure 15 Updating the database





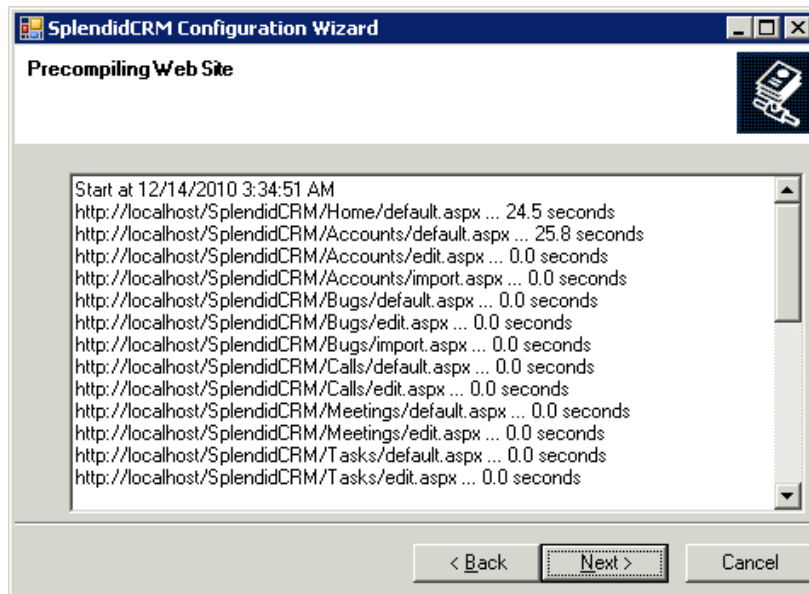
8. Select the languages that you would like to support. Please keep in mind that additional memory is required for each supported language. Additional language packs can be added in the SplendidCRM Admin area.

Figure 16 Languages



9. The precompile process can take a couple of minutes, but it is useful to ensure the best customer experience.

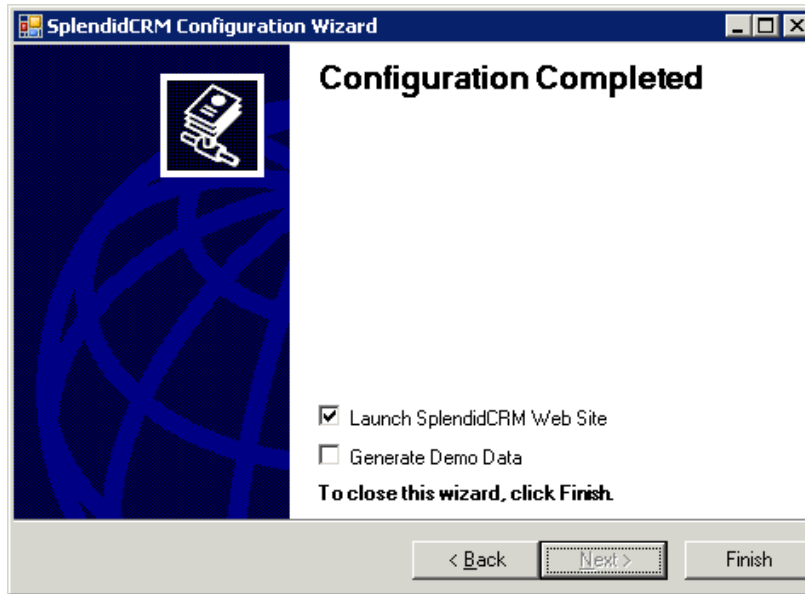
Figure 17 Precompiling the Web Site





10. If the installation completes without any errors, you will be given the opportunity to launch the web site. If there were errors, the errors will be summarized here. If you would like to have the CRM pre-populated with demo data, please click the Generate Demo Data checkbox. The demo data can be completely deleted using an Admin operation.

Figure 18 Installation Complete



11. page: <http://localhost/SplendidCRM>. The first time an administrator logs in, he/she will be presented with a System Title page. If you select Anonymous Authentication, the default login will be “admin” and the default password will also be “admin”.

Figure 19 SplendidCRM System Title

**SYSTEM TITLE**

*Please specify the title and upload a logo (optional).*


Company Name:

Header Image:

Header Image Width:

Header Image Height:

Header Image Style:





- Following the System Title page is the System Locale page, which allows the administrator to set default values for the Language, Currency, Date Format, Time Format and Time zone.

Figure 20 SplendidCRM System Locale

**SYSTEM LOCALE**

*Please specify the default language, date format and currency format.*

Language	<input type="text" value="English (United States)"/>	Currency	<input type="text" value="U.S. Dollar: \$"/>
Date Format	<input type="text" value="MM/dd/yyyy 12/14/2010"/>	Time Format	<input type="text" value="h:mm tt 3:41 AM"/>
Timezone	<input type="text" value="(GMT-05:00) Eastern Time (US &amp; Canada)"/>		

- The Mail Settings page provides the administrator with the ability to specify the mail settings used by the email manager and the campaign manager.

Figure 21 SplendidCRM Mail Settings

**MAIL SETTINGS**

*Please specify the SMTP settings used to send emails.*

From Name:	<input type="text"/>	From Address:	<input type="text"/>
SMTP Server:	<input type="text"/>	SMTP Port:	<input type="text"/>
Use SMTP Authentication?	<input type="checkbox"/>	Enable SMTP over SSL:	<input type="checkbox"/>
SMTP Username:	<input type="text"/>	SMTP Password:	<input type="text"/>



14. The first time a user logs in, he/she will be presented with a Your Profile page. At a minimum, the user should specify a name and an email address.

Figure 22 SplendidCRM Your Profile

**YOUR PROFILE**

*Please specify your profile information.*

First Name:	<input type="text" value="Will"/>	Last Name: *	<input type="text" value="Wonka"/> Required Field.
Email address *	<input type="text" value="will@wonka.com"/> Required Field.		
Office Phone	<input type="text"/>	Mobile Phone	<input type="text"/>
Primary Address	<input type="text"/>		
City	<input type="text"/>	State	<input type="text"/>
Postal Code	<input type="text"/>	Country	<input type="text"/>

15. The user should also specify his/her preferred Language, Currency, Date Format, Time Format and Time zone.

Figure 23 SplendidCRM Your Locale

**YOUR LOCALE**

*Please specify your language, date format and currency format.*

Language	<input type="text" value="English (United States)"/>	Currency	<input type="text" value="U.S. Dollar: \$"/>
Date Format	<input type="text" value="MM/dd/yyyy 12/14/2010"/>	Time Format	<input type="text" value="h:mm tt 3:50 AM"/>
Timezone	<input type="text" value="(GMT-05:00) Eastern Time (US &amp; Canada)"/>		



16. The user should provide email settings so that email can be sent on his/her behalf. The SMTP Server must be provided by the administrator.

Figure 24 SplendidCRM Your Email Settings

**YOUR EMAIL SETTINGS**

*Please specify your email account information.*

SMTP Server: \_\_\_\_\_

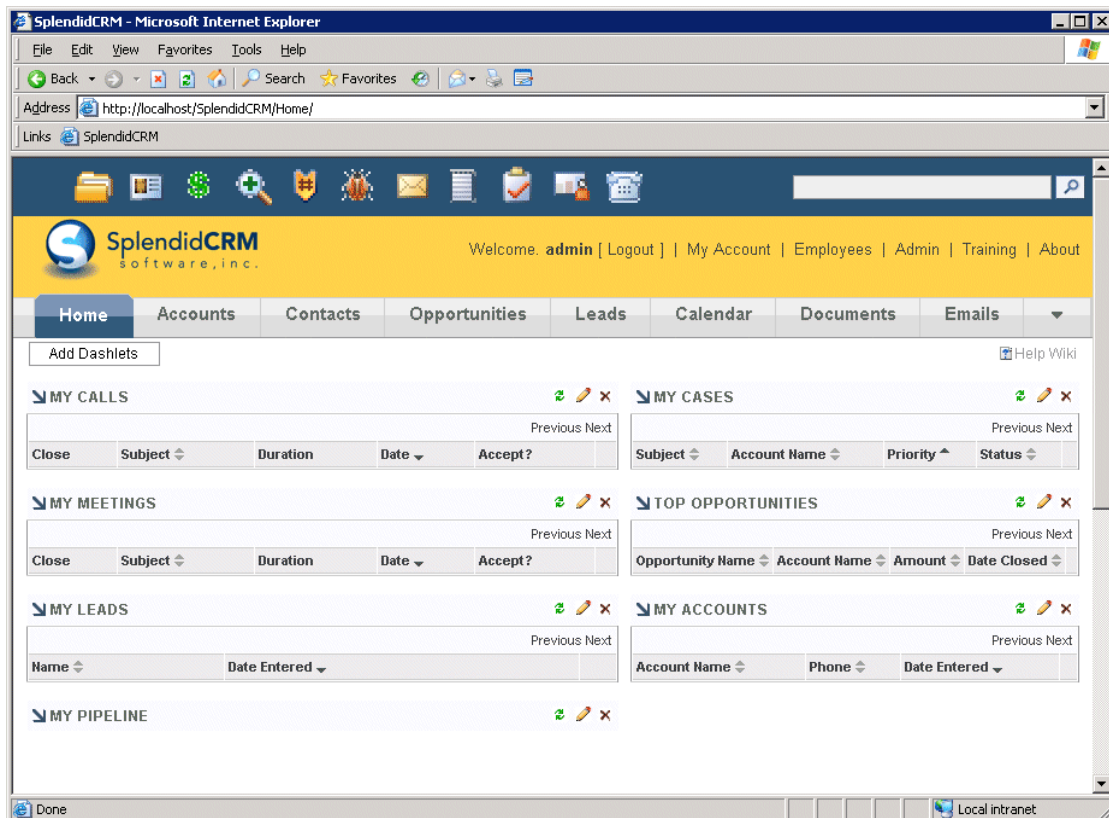
SMTP Username:

SMTP Password:



17. page: <http://localhost/SplendidCRM>. If you select Anonymous Authentication, the default login will be “admin” and the default password will also be “admin”.

Figure 25 SplendidCRM home page



You now have SplendidCRM successfully installed on the computer.

### Confirming Successful SQL Server Express Installation

Use the following procedure to confirm that the installation of SQL Server Express was successful.

1. Right-click **My Computer** and click **Manage**.
2. Double-click **Services and Applications**.
3. Double-click **Services**.
4. Confirm that **MSSQL\$SPLendidCRM** is in the list of services. Other instances may exist; if they do they will be listed as **MSSQL\$\*\*\*\*** (where asterisks indicate the name of the instance).

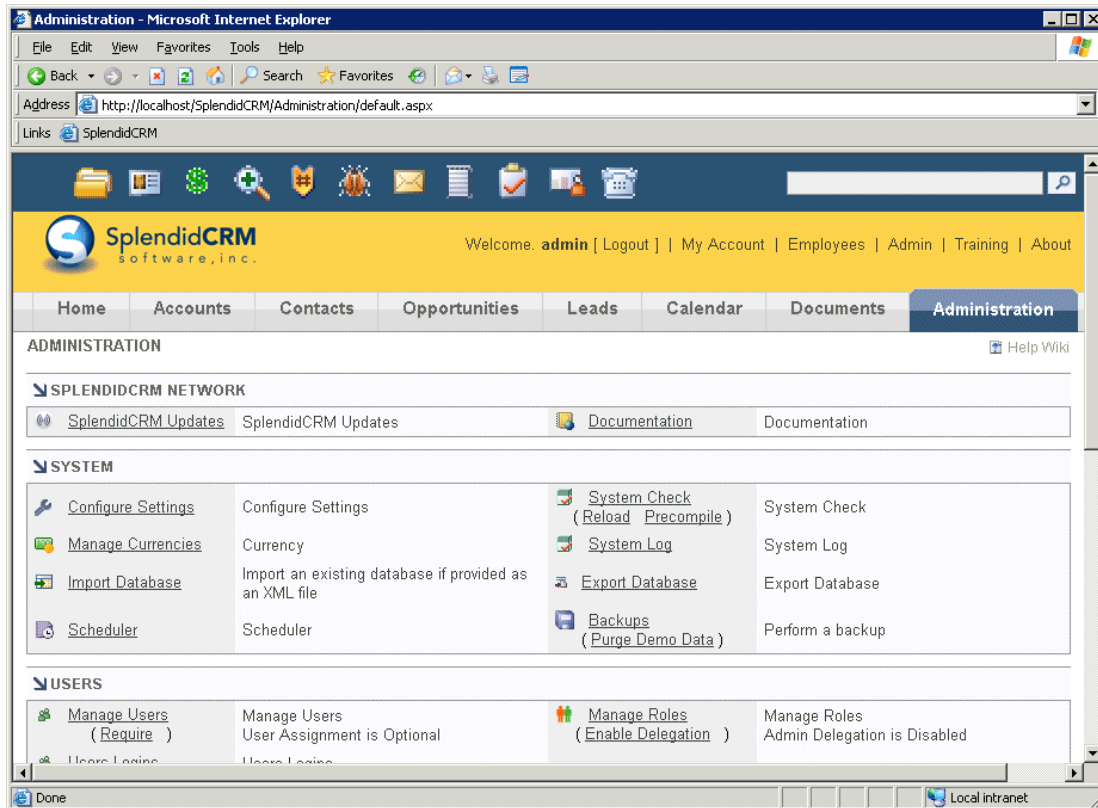


### Configuring SplendidCRM

After you have installed SplendidCRM, you can use the SplendidCRM admin page to configure your server.

A link to the admin page is typically located in the upper right corner of the page. Alternatively, you can navigate manually to the admin page: <http://localhost/SplendidCRM/Administration>.

Figure 26 SplendidCRM Admin page





### Backup and Restore Operations

Should a data-loss situation occur, backing up your SQL Server Express database and SplendidCRM configurations can help minimize the amount of time and work required to restore your environment.

SplendidCRM has a built-in scheduler that has been configured by default to backup the database once a week. You can also backup the database manually using SplendidCRM Administration Page.

### Backing Up SplendidCRM Manually

Use the **osql** command to back up the SplendidCRM database. Or, you may use SQL Query Analyzer if you have SQL Server 2005 installed somewhere in your organization.

1. Log on to the server as an administrator if not already logged on.
2. Create a folder: C:\Backup.
3. Open a command window. Click **Start**, click **Run**, type **cmd**, and then click **OK**.
4. At the command prompt, go to the “C:\Program Files\Microsoft SQL Server\80\Tools\Binn” folder.
5. Login to the SplendidCRM instance using **osql**. The **-S** switch is used to specify the server and the **-E** switch is used to enable a trusted connection.

```
osql -S (local)\SplendidCRM -E
```

Alternatively, you can login using SQL Server authentication by specifying the **sa** user and password.

*Note:* The default **sa** password is **splendidcrm2005**.

```
osql -S (local)\SplendidCRM -U sa -P splendidcrm2005
```

6. Backup the SplendidCRM database with the following command:

```
1>backup database SplendidCRM to disk = 'c:\Backup\splendidcrm.bak'  
2>GO
```

7. Quit **osql**.

```
3>quit
```

The backup should be copied to a secure, remote directory that will be available in the event of a data loss situation.

#### Note

Microsoft has released SQL Server Management Studio Express as a free tool to manage an SQL Server Express database or a MSDE database. You can find this tool at: <http://www.microsoft.com/express/Database/>



## Restoring SplendidCRM Manually

In the event of an SQL Server Express database corruption, use the following procedure to restore the SQL Server Express database to the point at which it was last backed up.

1. Log on to the server as an administrator.
2. Create a folder C:\Backup.
3. Copy the backup file to the C:\Backup directory.
4. Open a Command window. Click **Start**, click **Run**, type **cmd**, and then click **OK**.
5. At the command prompt, go to the "C:\Program Files\Microsoft SQL Server\80\Tools\Binn" folder.
6. Login to the SplendidCRM instance using **osql**. The **-S** switch is used to specify the server and the **-E** switch is used to enable a trusted connection.

```
osql -S (local)\SplendidCRM -E
```

Alternatively, you can login using SQL Server authentication by specifying the **sa** user and password.

*Note:* The default **sa** password is **splendidcrm2005**.

```
osql -S (local)\SplendidCRM -U sa -P splendidcrm2005
```

7. Restore the SplendidCRM database by using the command:

```
1>restore database SplendidCRM from disk = 'c:\Backup\splendidcrm.bak'  
2>GO
```

8. Quit **osql**.

```
3>quit
```



## Removing SplendidCRM

When you uninstall a SplendidCRM, the default is to detach the SplendidCRM databases. Detach means to keep all data files.

### Uninstalling SplendidCRM

Use the following procedure to uninstall the SplendidCRM.

1. Log on to the SplendidCRM server using local administrator credentials.
2. Click **Start**, point to **Settings**, click **Control Panel**, and then double-click **Add or Remove Programs**.
3. In **Add or Remove Programs**, click **SplendidCRM**, and then click **Change**.
4. On the **Setup Wizard** page, click **Next**.
5. On the **Program Maintenance** page, select **Remove**, then click **Next**.
6. Click **Remove**.

If the SQL Server Express was installed during Setup, it will need to be removed separately.



## Appendix A: Attaching to SQL Server 2005/2008

Attaching to either SQL Server 2005 or SQL Server 2008 is straight forward for those familiar with administering SQL Server. If you are not familiar with administrating SQL Server, then we recommend that use allow the setup application to install SQL Server Express.

1. Copy the SplendidCRM database files from the installation folder to the database server. The database files are SplendidCRM\_Data.MDF and SplendidCRM\_Log.LDF.
2. Attach the SplendidCRM database to the desired SQL Server instance.
3. Select an existing user or create a new user with ownership rights to the SplendidCRM database.
4. Update the web.config file with SQL Server location and the user credentials. The connection string is stored with the SplendidSQLServer key.

```
<configuration>
  <appSettings>
    <add key="SplendidProvider" value="System.Data.SqlClient" />
    <add key="SplendidSQLServer" value="data
source=(local)\SplendidCRM;initial catalog=SplendidCRM;persist security
info=True;packet size=4096;user id=sa;password=splendidcrm2005" />
  </appSettings>
  . . .
```

5. Enable TCP/IP protocol.

### Note

The TCP/IP protocol is not enabled by default in a SQL Server installation. You may need to use the SQL Server Configuration Manager to enable the protocol.

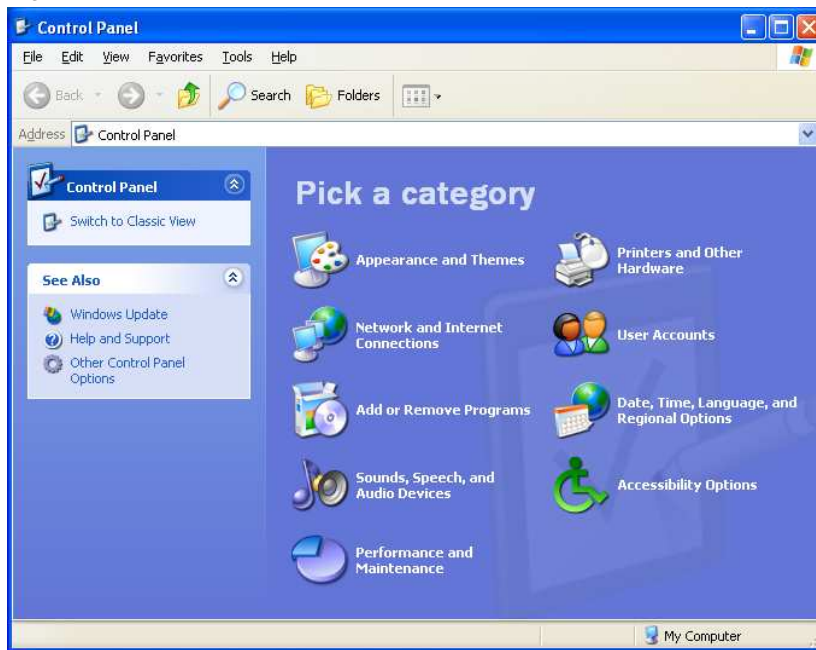


## Appendix B Manually installing IIS

SplendidCRM requires IIS and will install it if it is not already installed. However, we recommend that you install manually.

1. Launch the Windows **Control Panel**.

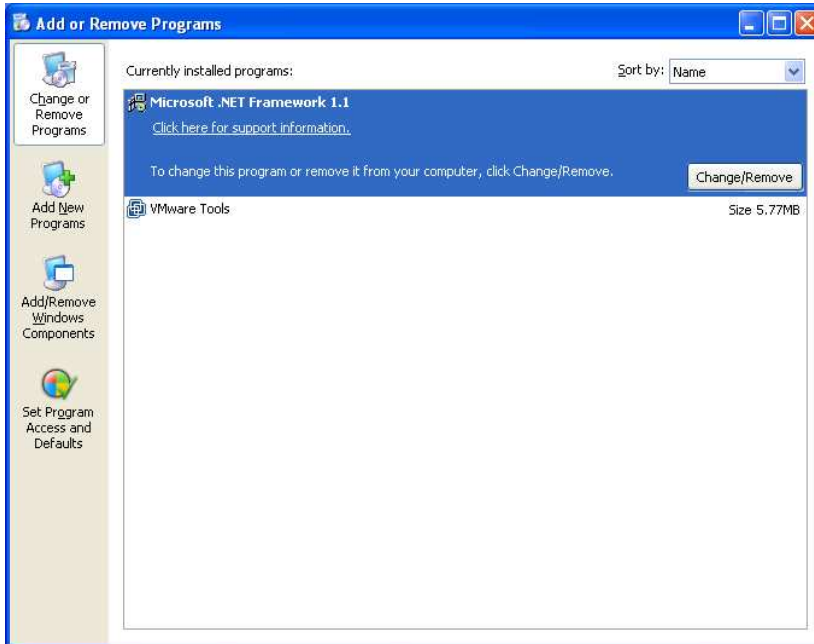
Figure B1 Control Panel





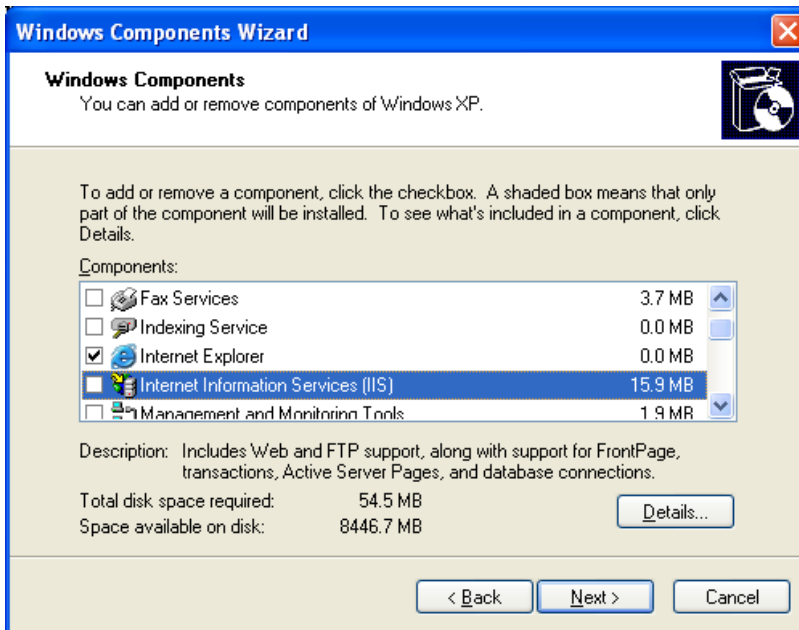
2. Select Add or Remove Programs.

Figure B2 Add or Remove Programs



3. Select Add/Remove Windows Components.

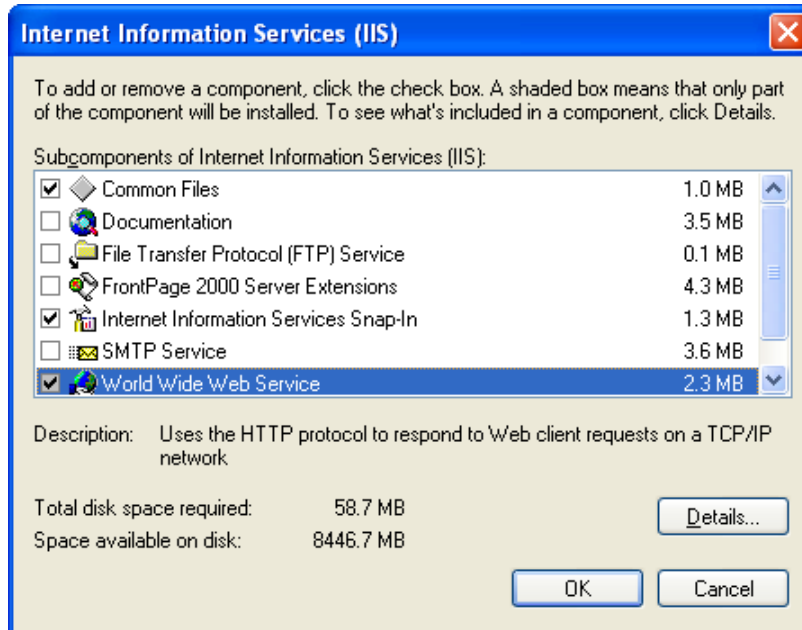
Figure B3 Windows Components Wizard





4. Highlight, but do not select **Internet Information Services (IIS)**, then click **Details**. We do not want to select IIS at this time because it will add services that are not necessary or desired.

Figure B4 Internet Information Services (IIS)





5. Check **World Wide Web Services**. Doing so will cause **Common Files** and **Internet Information Services Snap-In** to also be checked. This is normal behavior.
6. Select **OK**, then **Next**. IIS will be installed.

Figure B5 Internet Information Services (IIS)



**Note**

After installing IIS, we recommend that you use the Windows Update service to ensure that all security patches are applied to IIS.



## Appendix C Additional Resources

For more information about deploying SplendidCRM, see the following resources.

- SQL Server 2008 Home page at <http://www.microsoft.com/sqlserver/2008/en/us/>.
- SQL Server Management Studio Express at: <http://www.microsoft.com/express/Database/>
- How to manage the SQL Server Desktop Engine (MSDE 2000) or SQL Server 2005 Express Edition by using the osql utility <http://support.microsoft.com/kb/325003>.
- Backing Up and Restoring Microsoft Desktop Engine Databases at <http://office.microsoft.com/en-us/assistance/HA011382541033.aspx>