vtiger CRM 4.2

Installation Manual for Windows

(Revision 4.2)

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1. System Requirements

- **Hardware:** x486 with 256 MB RAM or higher with a minimum of 100 MB disk space.

- **Operating System:** Windows 2000/NT/XP/2003.

- **Web Server:** Apache version 2.0.40 and higher or Microsoft version IIS 5 and higher.

- **Database:** MySQL version 4.0.X or higher.

- **PHP:** 4.2.X through 4.3.X.

- **Web Browser:** IE 5.5/6.0, Netscape version 7.0 and higher, Mozilla version 1.4 and higher, or Opera version 7.21 and higher.

2. Installation Prerequisites

- You must have "Administrator privileges" on the system. If you are installing with any other privileges, the vtiger CRM software will not be installed properly.

- Before installing the vtiger CRM software, stop the Apache and MySQL services (If running in your system).

- The vtiger CRM software is compatible with Apache 2.0.40 and MySQL 4.0.20 and above. If these software are already installed in your machine, you can use the same. Otherwise use the Apache and MySQL bundled with the vtiger CRM software.

3. Installing vtiger CRM in Apache

To install vtiger CRM, Apache, MySQL, and PHP are very essential. You can install vtiger CRM according to your software requirements:

- Install complete package of vtiger CRM - **vtiger_CRM_4_2.exe**.

  Note: Use this package if you have not installed Apache, MySQL, and PHP packages in your machine.

- Install vtiger CRM without Apache and MySQL - **vtiger_CRM_4_2.exe**.

  Note: This package is same as above except that you may not install Apache and MySQL. But PHP package will be installed even though it is available in your machine. Use this package if you have already installed Apache and MySQL, packages in your machine.

- Install only vtiger CRM source - **vtiger_CRM_4_2_Source.zip**.

  Note: Use this package if you have already installed Apache or Microsoft IIS, MySQL, and PHP in your machine.

Warning: vtiger CRM by default installs PHP even though it is already installed in your machine. If you are already using PHP, as a precautionary measure take a backup of **php.ini** file.

Installing Combined vtiger CRM, Apache, and MySQL

For the convenience of first time users, vtiger CRM is bundled with compatible versions of Apache, MySQL, and PHP.

To install the complete package of vtiger CRM:

1. Download **vtiger_CRM_4_2.exe** from
   http://www.sourceforge.net/projects/vtigercrm/.

2. Run the **vtiger_CRM_4_2.exe**. Installation process starts within a few seconds.

3. In the *Welcome to the InstallShield Wizard for vtiger CRM* dialog, click the **Next** button.

4. In the *vtiger CRM Software License Agreement* dialog, read the license agreement and click the **Yes** button if you accept the license agreement.

5. Follow the steps given below to install **Apache** Web server bundled with vtiger CRM:

i. In the *Install Apache Options* dialog, select the **Install Apache** option and click the **Next** button.

ii. In the *Install Apache Web Server Port Selection* dialog, enter the port number in which Apache Web server must be started and click the **Next** button.

   Note: If you are not sure, you can use the default port number "80".

iii. In the *Apache Service Option* dialog, select the **Start the apache as a service** check box to automatically start the vtiger CRM as a service during startup.

6. Follow the steps given below to install MySQL bundled with vtiger CRM:

   i. In the *Install MySQL Options* dialog, select the **Install MySQL** option and click the **Next** button.

   ii. In the *MySQL Connection Parameters Configuration* dialog, enter the following MySQL connection parameters and click the **Next** button:

      ▪ **Port Number:** The port at which MySQL database server to must be started.

      ▪ **User Name:** The user name to login in to the MySQL database.

      ▪ **Password:** The password for the user.

         Note: If you are not sure, use the default Port as **3306,** and User Name as **root**. Keep the Password field empty.

7. In the *Chose Destination Location* dialog, either use the default directory *C:\Program Files\vtigerCRM4_Beta* or select a new directory. After selecting the destination directory, click the **Next** button.

8. In the *Select Program Folder* dialog, either use the default program folder vtiger CRM 4 Beta or enter a new folder. Now click the **Next** button.

9. In the *Start Copying Files* dialog, review Apache, MySQL, and PHP configuration settings. Click the **Next button** to start the installation or click the **Cancel** button to abort the installation. It will take approximately five minutes to complete the installation.

   Note: During the vtiger CRM software installation, <Apache Home>/conf/httpd.conf and %SystemRoot%/php.ini files will be modified. Also a backup copy of these files will be taken. Please proceed further if you accept these changes.

10. In the *Installation Wizard Complete* dialog, select the **Yes I want to start the server** option if you want to start the vtiger CRM server immediately. Also select the **Yes, I want vtiger CRM icon on desktop** option if you want a desktop shortcut. Click the **Finish** button. It will take a few minutes to start the vtiger CRM server.

Installing vtiger CRM without Apache and MySQL

Use the existing Apache and MySQL if already installed in your machine provided these versions are compatible with vtiger CRM.

Follow the procedure given below to install only vtiger CRM:

1. Download **vtiger_CRM_4_2.exe** from http://www.sourceforge.net/projects/vtigercrm/.

2. Run the **vtiger_CRM_4_2.exe**. Installation process starts within a few seconds.

3. In the *Welcome to the InstallShield Wizard for vtiger CRM* dialog, click the **Next** button.

4. In the *vtiger CRM Software License Agreement* dialog, read the license agreement and click the **Yes** button, if you accept the license agreement.

5. Follow the steps given below to use the existing Apache Web server:

   i. In the *Install Apache Options* dialog, select the **Use Installed Apache** option and click the **Next** button.

   ii. In the *Apache Web Server Home Selection,* browse the directory where the Apache is installed. (**Note:** If you give wrong directory, installation will not proceed further)

   iii. The Apache configuration file **httpd.conf** present under the *<Apache Home>/conf* directory, will be modified during vtiger CRM installation. Click **Yes** if you accept the "This selection will take backup and modify the httpd.conf file of the Apache installed in your machine. Do you want to continue?" message.

   iv. In the *Apache Web Server Home Selection* dialog, click the **Next** button.

6. Follow the steps given below to use the existing MySQL:

   i. In the *Install MySQL Options* dialog, select the **Use Installed MySQL** option and click the **Next** button.

ii. In the *MySQL Path Selection* dialog, browse the directory where MySQL is installed and click the **Next** button.

Note: If you give a wrong directory, installation will not proceed further.

iii. In the *MySQL Connection Parameters Configuration* dialog, enter the following MySQL connection parameters and click the **Next** button:

- **Port Number**: The port at which MySQL database server is running.

- **User Name**: The user name to log in to the MySQL database.

- **Password**: The password for the user.

  Note: If you are not sure, you can use the default Port – **3306,** User Name **– root**. Keep the Password field empty.

7. In the *Choose Destination Location* dialog, either use the default program folder or enter a new folder. Now click the **Next** button.

8. In the *Start Copying Files* dialog, review the Apache, MySQL, and PHP configuration settings. Click the **Next button** to start the installation or click the **Cancel** button to abort the installation. It takes approximately five minutes to complete the installation.

   Note: During the vtiger CRM software installation, the <Apache Home>/conf/httpd.conf and %SystemRoot%/php.ini files will be modified. Also a backup copy of these files will be stored with file extension as **vtigercrm.backup**. Please proceed further if you accept the changes.

9. In the *Installation Wizard Complete* dialog, select the **Yes I want to start the server** check box if you want to start the vtiger CRM server immediately. Also select the **Yes, I want vtiger CRM icon on desktop** check box if you want a desktop shortcut. Click the **Finish** button.

Installing Only vtiger CRM

If you have already installed Apache, MySQL, and PHP, follow the procedure given below:

1. Download **vtiger_CRM_4_2_Source.zip** from http://www.sourceforge.net/projects/vtigercrm/.

2. Extract the **vtiger_CRM_4_2_Source.zip** file into Apache root directory (For example, C:\Program Files\Apache Group\Apache2\htdocs)

3. Set up the vtiger CRM database as given below:

4. Start the MySQL database and create a database for vtiger CRM. The default database name is "vtigercrm4_2". If you want to use different database then modify the 2setConfig.php file present under <vtiger CRM Home>/install/ directory as given below in all the places.

   ```
   $db_name = 'vtigercrm4_2'; to
   $db_name = '<your database name>';
   ```

   In the **connection.php** file present under *<vtiger CRM Home>* directory, enter the values for the following variables:

   ```
   $mysql_username
   $mysql_password
   $mysql_port
   $apache_port
   ```

   Example:
   ```
   $mysql_username = 'root';
   $mysql_password = 'public';
   $mysql_port = '3306';
   $apache_port = '0.0.0.0:80';
   ```

5. Start Web Browser and follow the procedure given in the "Configuring vtiger CRM Server" section for completing the vtiger CRM installation.

Note: You must increase the value for **max_execution_time** in **php.ini** file as it takes about 300 seconds to execute the vtiger CRM installation script. By default the value is set as 30 seconds.

4. Installing vtiger CRM in Microsoft IIS

The vtiger CRM source ZIP can be installed in Microsoft IIS. You must have already installed the Microsoft IIS 5 or above, MySQL, and PHP before installing vtiger CRM.

Configuring Microsoft IIS to work with PHP-based application

Please follow the procedure given below to execute PHP scripts in Microsoft IIS:

1. Configuring the **php.ini** file:

> Download the Windows binary for the latest version of PHP (vtiger CRM supports PHP version 4). Once you've downloaded it, unzip it to a *C:* and rename the folder to "php". Open the PHP.INI-DIST file from the C:\PHP folder and locate the following line:
>
> **;cgi.force_redirect = 1**
>
> Remove comment in the above line and change the setting to 0 as shown below to run PHP under IIS. Make the necessary changes and save the file as php.ini in your Windows folder (C:\WINNT on my computer):
>
> **cgi.force_redirect = 0**

2. Configuring PHP in Microsoft IIS. Please refer to the following sites for more details:

- http://in.php.net/manual/en/install.windows.iis.php

- http://www.phpbuddy.com/category.php?cat_id=INST

Note: All the directories under vtigerCRM should have READ access permission. Otherwise, some of the images/files cannot be executed.

To install vtiger CRM in Microsoft IIS, follow the procedure given below:

1. Download **vtiger_CRM_4_2_Source.zip** from http://www.sourceforge.com/projects/vtigercrm.

2. Extract the **vtiger_CRM_4_2_Source.zip** file into Apache root directory (For example, C:\Inetpub\wwwroot\).

3. Set up vtiger CRM database as given below:

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4. Start the MySQL database and create a database for vtiger CRM. The default database name is "vtigercrm4_2". If you want to use different database then modify the **2setConfig.php** file present under the *<vtiger CRM Home>/install/* directory as given below in all the places.
```
$db_name = 'vtigercrm4_2'; to
$db_name = '<your database name>';
```

   In **connection.php** file present under *<vtiger CRM Home>* directory, enter the values for the following variables:
```
$mysql_username
$mysql_password
$mysql_port
$apache_port
```

   Example:
```
$mysql_username = 'root';
$mysql_password = 'public';
$mysql_port = '3306';
$apache_port = '0.0.0.0:80';
```

5. Start Web Browser and follow the procedure given in the "Configuring vtiger CRM Server" section for completing the vtiger CRM installation.

Note: You must increase the value for **max_execute_time** in **php.ini** file as it takes about 300 seconds to execute the vtiger CRM installation script. By default the value is set as 30 seconds.

5. Starting and Stopping the vtiger CRM Server

The vtiger CRM can be started or stopped according to the type of distribution used.

To start the vtiger CRM Server

- If you installed the Apache and MySQL that are bundled with vtiger CRM, start the vtiger CRM server as given below:

    1. Select **Start →Program Files →vtiger CRM → Start vtiger CRM** or

    2. Click the **vtiger CRM** desktop shortcut.

- If you are using the existing Apache/Microsoft IIS and MySQL, start the Apache/Microsoft IIS manually and connect to the vtiger CRM from *http://<host Name>:<port number>/<vtigerCRM Home>/index.php*.

To stop vtiger CRM Server

- If you installed the Apache and MySQL that are bundled with vtiger CRM, select **Start → Program Files → vtiger CRM → Stop vtiger CRM.**

- If you are using the existing Apache/Microsoft IIS and MySQL, stop the Apache/Microsoft IIS and MySQL manually.

6. Configuring the vtiger CRM Server

After installing the vtiger CRM, you must configure the vtiger CRM server with details such as database, site details and create database.

To configure vtiger CRM server

1. Start the Web Browser and enter *<localhost>/vtiger/index.php* in location bar.

2. In the *Registration* page, complete the product registration (Optional). Click the **Next** button.

3. In the *System Check* page, PHP, MySQL database, config.php, directories that have read/write permissions, and GD graphics library version status are displayed. Click the **Next** button.

   Note: Please ensure that all the directories have the read/write permission, otherwise you cannot work with features that require file upload and download.

4. In the *Database Configuration* page, enter the appropriate values for Database and Site Configuration sections.

   Database Configuration

   - **Host Name** *(mandatory)* – By default, Host Name is set as **<Machine Name>:<port number>**. Please do not change the port number as it is added during installation.

   - **User Name** *(mandatory)*– vtiger (Non-editable).

   - **Password (optional)**– currently Non-editable.

   - **Database Name** *(mandatory)*– vtiger (Non-editable).

   Site Configuration

   - **URL** *(mandatory)* – Enter the host name. By default, it is http://<machine name>.

   - **path** *(mandatory)* – By default, this is the path where vtiger CRM is installed.

   - **Path to Cache Directory (must be writable)** - By default, this is cache/. This folder is used to store the files, such as attachments, and import/export related files temporarily.

   Admin Configuration

- **username** – By default, the user name is set as "admin". If required, you can change the user name after installation.

- **admin password** *(mandatory)* – By default, the password is set as "admin". You can change the password after logging in to the vtiger CRM.

5. In the *Confirm System Configuration* page, review the configuration information. If you want to change the details, click the **Change** button. If you want to populate some data select the **Also populate demo data?** check box. Now click the **Create** button.

6. In the *Create Config File* page, click the **Next** button.

7. In the *Create Database* Tables page, the created database tables are displayed. Click the **Finish** button to complete the installation process.

8. In the *Login* page, by default the **User Name** field is set as "admin". In the **Password** field, enter the **admin password** you have set during installation process. Once you logged in successfully, your vtiger CRM launches as given below:

7. Starting the vtiger CRM in Web Browser

- If you installed the Apache and MySQL that are bundled with vtiger CRM, select **Start → Program Files → vtiger CRM → vtiger CRM Client**

- If you installed without Apache or/and MySQL that are bundled with vtiger CRM, open the *http://<host-name/<vtiger CRM Home>/index.php* in Web browser.

8. Configuring phpSysInfo

To display the vtiger CRM server details in Window OS you have to start phpSysInfo as a Windows service.

To install phpSysInfo as a windows service

<vtiger CRM Home>\modules>**phpsysinfo_service.exe -install**

To uninstall as a windows service

<vtiger CRM Home>\modules>**phpsysinfo_service.exe -uninstall**

To start the service

<vtiger CRM Home>\modules>**net start "phpsysinfo"**

To stop the service

<vtiger CRM Home>\modules>**net stop "phpsysinfo"**

The PHPSysInfo Service V1.2 service is starting.
The PHPSysInfo Service V1.2 service was started successfully.

To test the service

<vtiger CRM Home>\modules>**telnet 127.0.0.1 1337**

Trying 127.0.0.1...
Connected to 127.0.0.1.
Escape character is '^]'.
GET kernel
5.0.2195 Service Pack 4

9. Fetching E-mail Messages as RSS Feeds

You can fetch incoming E-mail messages as RSS feed in RSS module by specifying appropriate values in **mailfeed.php** file present under *<vtiger CRM Home>/modules/squirrelmail-1.4.4* directory as given below:

Line 33 through 61

POP3/IMAP/NNTP server to connect to, with optional port.

$server = "test.com:143";

 Protocol specification (optional)

$protocol = "/notls";

Name of the mailbox to open

$mailbox = "INBOX";

Your username

$username = "user-name";

Your password

$password = "password";

10. Troubleshooting Tips

1. I am unable to complete the initial configuration process and the following error message is displayed in Web browser:

Warning: mysql_connect(): Host <'Server Name'> is not allowed to connect to this MySQL server in C:\Program Files\vtigerCRM\apache\htdocs\vtigerCRM\database\DatabaseConnection.php on line 42

Could not connect to server <Server Name>:<port no> as vtigercrm.Host <'Server Name'> is not allowed to connect to this MySQL server

Solution: This error message is displayed when you have not uninstalled the older version of vtiger CRM fully. Follow the procedure given below to overcome this issue:

1. Stop the vtiger CRM server from Start → Program Files → vtiger CRM → Stop vtiger CRM.

2. Start the Command Prompt and enter the following command:

   :\mysql –u root –port

3. Drop the existing vtigercrm database from MySQL as given below:

   mysql>drop database vtigercrm;

4. Start the vtiger CRM server from Start --> Program Files -->vtiger CRM -->Start vtiger CRM.

2. After completing the installation I am not sure, how to start the vtiger CRM.

- **If you are using bundled Apache and MySQL with the vtiger CRM**

  Start the vtiger CRM server from **Start → Program Files → vtiger CRM → Start vtiger CRM**. After a few seconds, start the vtiger CRM client from **Start → Program Files → vtiger CRM → Start vtiger CRM**.

- **If are using the existing Apache and MySQL**

  Start the Apache Web server manually from the *<Apache Home>/bin* directory then start Web browser and enter the following URL:

  http://<Host-name>/<vtiger Home>index.php

3. By default, the value for **log4php.rootLogger** is set as "debug" in **log4php.properties** file present under *<vtiger CRM Home>* directory. If you experience any problems, change the logging level to "fatal" or "warning"

Line: 10

`log4php.rootLogger=debug, A2`

11. Known Issues

- If you select Start → Program Files → vtiger CRM → start vtiger CRM. First you have to start Apache manually then use Start → Program Files → vtiger CRM --> start vtiger CRM to start the vtiger CRM.

- If you select to use the existing Apache and (or) MySQL options during installation, stopping the vtiger CRM using Start -->Program Files --> vtiger CRM -->stop vtiger CRM will not work. You have to stop Apache and MySQL manually.

  Note: vtiger CRM does not stop the Apache and MySQL as you may be also using Apache and MySQL software for some other applications.

- While uninstalling the vtiger CRM, some of the files are not deleted. You have to delete those files manually.

- If the user-specific Apache is selected and PHP is already associated with the existing Apache (conf/httpd.conf), bundled PHP cannot be associated with the existing Apache. To overcome this issue, you have to install another instance of Apache and associate the bundled PHP with this instance.

- In case of user Apache, if the entry **"ScriptAlias /cgi-bin/ <cgi-bin directory path>"** is not present in *<Apache Home>/conf/httpd.conf* then the **httpd.conf** file will not be updated to associate PHP with Apache. The user has to manually edit the **httpd.conf** file.

- If you create a new role with space in the name (for example, Sales User), then you will have issues allocating permissions.

- You cannot change the user's role once specific role is assigned to the user.

- If you are migrating from older version (v2.1, v3.0, v3.2, v4.0, or v4.0.1) to vtiger CRM 4.2, immediately after logging in as "admin" user, assign roles to all the other users. Otherwise users cannot be able to log in and "**UserInfoUtil at line 10"** error message is displayed in browser.

12. Related Documents

You can refer to the following documents to use the vtiger Outlook Plug-in software with vtiger CRM:

- vtiger Outlook Plug-in User Manual: (Refer to: http://vtiger.com/products/crm/help/vtiger_Outlook_Plugin_User_Guide.pdf).

- vtiger Office Plug-in User Manual: (Refer to: http://vtiger.com/products/crm/help/vtiger_Office_Plugin_User_Guide.pdf).

- vtiger Thunderbird Extension User Manual: (Refer to: http://vtiger.com/products/crm/help/vtiger_Thunderbird_Extension_User_Guide.pdf)

- vtiger Customer Portal User Manual: (Refer to: http://vtiger.com/products/crm/help/vtiger_CRM_Customer_Portal_User_Guide.pdf)

Note: The vtiger Outlook Plug-in, vtiger Office Plug-in, and vtiger Thunderbird/Mozilla Extension are browser-side software and work only with Microsoft Outlook, Microsoft Office, and Thunderbird/Mozilla respectively.

13. Customer Support

Please post your valuable comments, feature requests, and issues in **vtiger CRM Discussions** (http://www.vtiger.com/discussions/) so that we can provide technical support for you.