

sfCRM Installation Guide for Mac OSX

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Table of contents

1.0 Overview	3
Installation on a Mac OSX system.....	3
2.1. Prerequisites.....	3
2.1.1 Suggested Mac Configuration:.....	3
2.1.2 Software requirements:.....	3
2.1.3 Installation.....	4
3.0 Configuring server parameters.....	5
4.0 General Notes on sfCRM installation:	6

1.0 Overview

This guide describes the procedure for installing and upgrading sfaFinity's sfCRM and related products. If you are a system administrator, a fairly experienced user or are evaluating any of sfaFinity's products, this guide is for you. After you have installed the product, you can configure it using its built-in administration tools.

Installation on a Mac OSX system

2.1. Prerequisites

2.1.1 Suggested Mac Configuration:

The minimum configuration that is required to run sfCRM is the following:

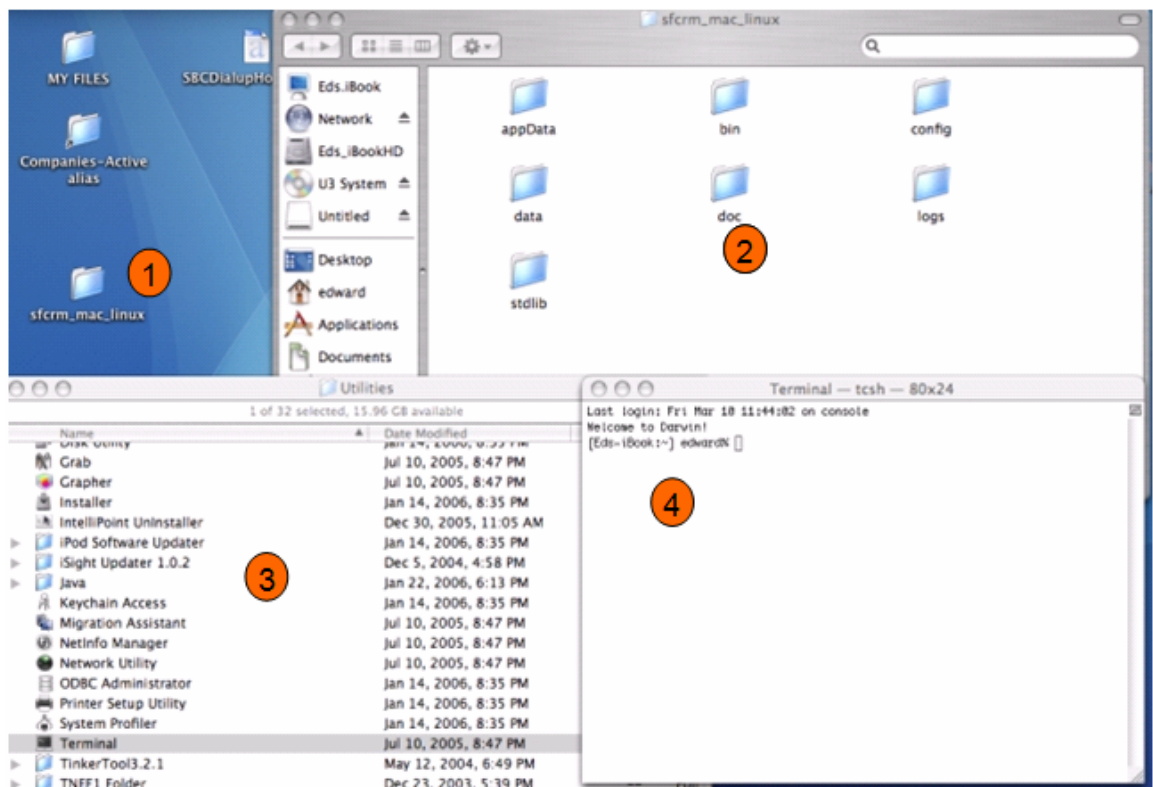
1. Power PC 1.5 GHz CPU or higher speed
2. 512MB RAM (1024 MB recommended)
3. 15MB disk space for sfCRM server program. Additional disk space is required based on the amount of data records, attachments and emails that are stored in the system.

2.1.2 Software requirements:

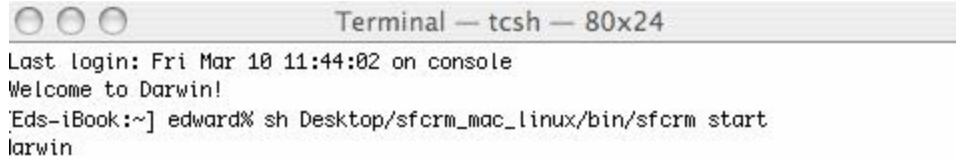
1. Operating Systems supported: Mac OSX (Darwin)
2. Make sure that you have the application installation file. The installation file is a Windows executable file, and usually carries a name like `sfcrm_mac_linux.zip`
3. Install Java runtime environment on your computer. The application requires Java version 1.4.1 or higher. You can use the Sun Java system, available from: <http://www.info.apple.com/kbnum/n301073> Please copy the above URL and paste it in your browser. Click on the download button – the name of the file to download is: `Java15Release1.dmg` . After downloading this file, install it to complete the installation of Java on your local Mac where you plan to install sfCRM.

2.1.3 Installation

- Copy the installation file `sfcrm_mac_linux.zip` to your Mac desktop.
- Double-click on the file. The contents will be extracted to a folder named `sfcrm_mac_linux` on your desktop (refer #1 on the image below)). If you explore the contents of the folder, you will see the subfolders (refer # 2)
- Click on your desktop so that the Finder menu appears
- Click on Go and locate the Utilities option and select the "Terminal" utility. (refer # 3)
- The Terminal window appears (refer # 4)




- f. In the Terminal window, type the command:
sh Desktop/sfcrm_mac_linux/bin/sfcrm start to start the sfCRM application server on the Mac system.



```
Terminal — tcsh — 80x24
Last login: Fri Mar 10 11:44:02 on console
Welcome to Darwin!
Eds-iBook:~] edward% sh Desktop/sfcrm_mac_linux/bin/sfcrm start
larwin
```

- g. Open up FireFox (not certified on Safari – but works for most screens) and type in the following URL: <http://localhost:8000>
- h. To stop sfCRM on the Mac, open up the Terminal Window and type the command :

```
sh Desktop/sfcrm_mac_linux/bin/sfcrm stop
```



```
Terminal — tcsh — 80x24
Last login: Fri Mar 10 11:44:02 on console
Welcome to Darwin!
Eds-iBook:~] edward% sh Desktop/sfcrm_mac_linux/bin/sfcrm stop
arwin
Eds-iBook:~] edward% █
```

You can now access the application via any standard Internet browser (IE, FireFox, Mozilla). Access the URL <http://localhost:8000> or <http://my-machine:8000> (where my-machine is the name of your computer) to use the application

For evaluation versions of the application, you can use the login name: "Admin" and the password is "admin". Note that logins and passwords are case-sensitive and without the quotes.

3.0 Configuring server parameters

Some of the application's server parameters can be configured via editing the parameter file `serverParams.txt`, which is located in the application's `bin` folder (typically the folder `Desktop\sfcrm_mac_linux\bin\`)

- By default, the application is configured to use port 8000, so as not to conflict with other Windows services that you might be running. If you wish to use the default port 80, you can edit this file and change the parameter `server.portNumber` from 8000 to 80.

- You can ensure a clean restart of the server every night by setting the parameter `server.restartTime` to a suitable time, e.g., 02:30 to mean 2:30 am.
- You can set the maximum memory used by the application via the parameter `server.maxMemory`.
- You can make the server use SSL (secure sockets layer) using a default certificate by setting the parameter `server.useSSL` to 1. (Not recommended for evaluation installations – usually reserved for production)

Note that if you change any of these parameters, you must shut down and restart the application for the changes to take effect.

4.0 General Notes on sfCRM installation:

1. sfCRM is a server class application and can support any number of users starting from 5 to 5000 upwards.
2. sfCRM is web based and installs on a PC/Server which can be accessed by other user PC's using a standard Internet browser such as IE, Mozilla and FireFox.
3. sfCRM is by default installed on the Desktop. If you wish to install this on any other folder of choice, you can do so. However, you need to make the following changes to sfCRM's application start and stop functions.
To start sfCRM:

```
sh {My Folder of Choice}/sfcrm_mac_linux/bin/sfcrm  
start .
```

My folder of Choice is the full path name where you have installed sfCRM (without parentheses).
To stop sfCRM:

```
sh {My Folder of Choice}/sfcrm_mac_linux/bin/sfcrm  
stop
```
4. sfCRM will have a GUI installer and an app start/stop utility in the April/May production release of sfCRM.
5. When using sfCRM for the first time after boot, the first time an entity or object is clicked, it will appear marginally slower. This is because sfCRM caches this entry. The next time the same entity or object is accessed, the access time will be normal. Normal access times for most end user access times (does not apply to reports) is 3 secs or less.
6. To install it in multi-user mode, you will need a multi-user license. Please contact SFAFINITY for a multi-user (5) license.
7. The only access to sfCRM is by using an Internet browser for end user access, administration or configuration.

8. sfCRM start/stop instructions have been provided above. Please do not shutdown the Mac without shutting down sfCRM as this may corrupt the database.
9. If you wish to backup your database for safekeeping, shutdown the server, locate the \data\McKoi\Data folder and backup all the files into a zip file that can be stored on another Mac or a backup USB drive.
10. In case you have a problem with your Mac (disk crash, OS corruption or other catastrophic event), it is very simple to restore your data. Install sfCRM as shown above, copy all the files from the backup (\data\McKoi\data files that you have backed up and stored elsewhere) into the corresponding location of your new installation.