

# *sfCRM Installation Guide for Windows*

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## 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 Windows system

### 2.1. Prerequisites

#### **2.1.1 Suggested PC Configuration:**

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

1. Intel/AMD 2.0Ghz CPU or higher speed
2. 512MB RAM
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: Windows NT, 2000, 2000Pro, XP Home, XP Pro, 2003 Server
2. Make sure that you have the application installation file. The installation file is a Windows executable file, and usually carries a name like `sfcrmInstall-v1.30b051215.exe`.
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://java.sun.com/j2se/1.5.0/download.jsp> - the link to download is the JRE 5.0 Update 6 (file name: `jre-1_5_0_06-windows-i586-p.exe` ). For your convenience, this file has been included in the USB/CD drive provided to you.

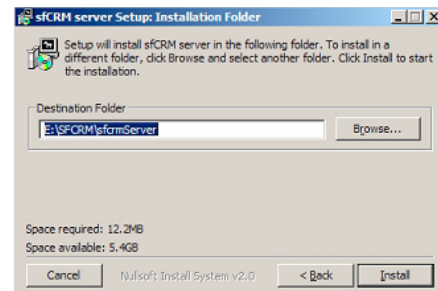
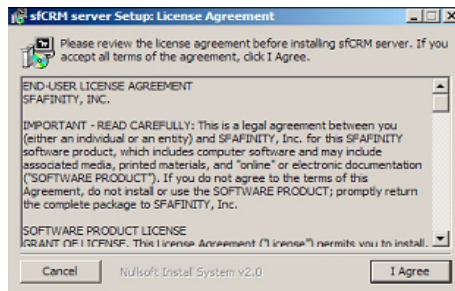
We suggest the use of Sun Java on Windows platform.

Please copy the above URL and paste it in your browser. After downloading the files, double click on the file to complete the installation of Java on your local desktop PC where you plan to install sfCRM.

Alternatively, you can use the BEA JRockit Java system, available from : [http://download2.bea.com/pub/jrockit/50/jrockit-R26.0.0-jre1.5.0\\_04-win-ia32.exe](http://download2.bea.com/pub/jrockit/50/jrockit-R26.0.0-jre1.5.0_04-win-ia32.exe)

### 2.1.3 Installation

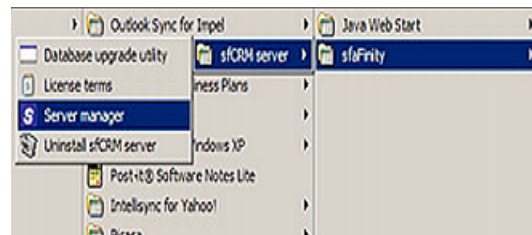
1. Double-click on the installation file. The installation wizard is started, and the end-user license agreement is displayed. Click the “I Agree” button to accept the license.
2. The next screen shows a default choice for the directory on your system where the application will be installed.



3. Click the “Install” button to complete the installation of the application on your computer.

### 2.1.4 Starting and stopping the application

When the application is installed, it creates menu items in your Windows start menu. To start the application, navigate to the menu item (Start -> Program Files -> SFAFINITY) for the application and click the menu item labeled “Server Manager”



The application displays a red icon in your task bar for a few seconds, while it starts up. When the startup is complete, it shows a blue icon to indicate that it is running.



You can now access the application via any standard Internet browser. Access the URL <http://localhost:81> or <http://my-machine:81> (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.

If you wish to stop the application, right-click on the blue S icon in the system tray. When the menu appears, click the “Stop server” menu item.

### 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 `C:\Program Files\sfafinity\sfCRM server\bin`).

- By default, the application is configured to use port 81, 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 81 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 users using a standard Internet browser such as IE, Mozilla and FireFox.
3. 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.
4. To install it in multi-user mode, you will need a multi-user license. Please contact SFAFINITY for a multi-user (5) license.
5. The only access to sfCRM is by using an Internet browser for end user access, administration or configuration.
6. sfCRM start/stop instructions have been provided above. Please do not shutdown the PC without shutting down sfCRM.
7. 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 PC or a backup USB drive.

8. In case you have a problem with your PC (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.