



PDI CRM Setup

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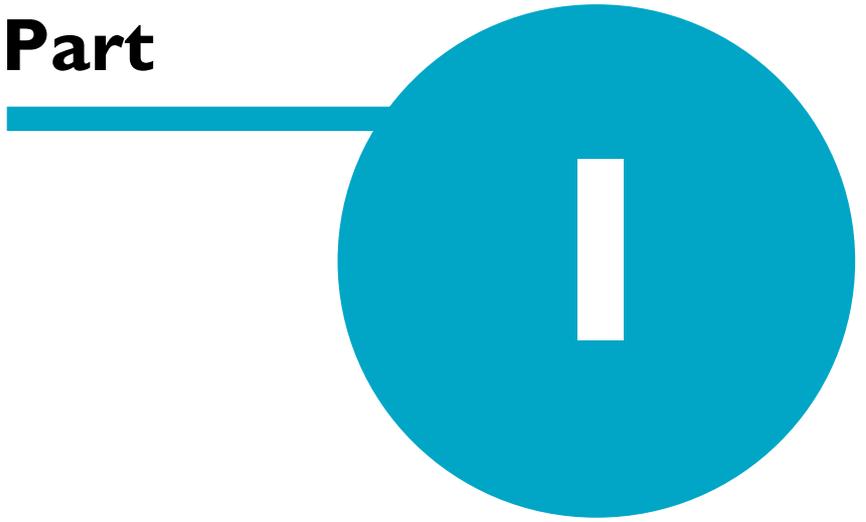
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Part



I Firebird

PDI CRM for Pastel Accounting uses the Firebird SQL server database software. This is developed and maintained under the 'Public License' agreement. Firebird was started after the release of the source code of Interbase by Inprise Corp (now know as Borland Software Corp) on 25 July, 2000.

The Firebird RDBMS can be run as a stand alone server on one machine or across a Windows network platform. The Firebird has a small foot print and is easy to configure and maintain.

This documentation is based on the fact that you have a Firebird server (either locally or remotely) installed and running.

I.1 CRM Connection

The CRM Connection application and settings can be found in the **CRMConnect.exe** application. When you launch this application a screen similar to the following is displayed. This information must be completed before you can create your CRM Database and start CRM.

The screenshot shows a Windows-style dialog box titled "Firebird Client DLL". It contains the following fields and controls:

- Firebird Client DLL:** A text box containing the path "C:\Program Files\Firebird\Firebird_2_1\bin\fbclient.dll".
- Firebird server (leave blank or enter localhost for local server):** A text box containing "PDISPIRIT" followed by a masked password "XXXX".
- Connection Protocol:** A dropdown menu currently set to "TCP".
- System User ID:** A text box containing "SYSDBA".
- System Password:** A text box containing a masked password "XXXXXXXXXX".
- Buttons:** "OK" and "Cancel" buttons at the bottom.

Firebird Client DLL: This is the client DLL located on the users machine, normally this is found in the c:\program files\firebird\Firebird_X\bin folder.

Firebird server: This should be the machine name running the Firebird server software. If you wish to run as a standalone system then this can be left blank or enter **localhost**

Connection Protocol: This should be set to the protocol used for connecting and passing data between the client and the server. Normally, this would be the **TCP/IP** protocol, only change this if you have reason to and understand the Firebird server settings.

System User ID: Default Firebird System administrator user is **SYSDBA**

System Password: Default Firebird System password for the user SYSDBA is **masterkey**

The settings are saved in to the systems settings folder e.g. **C:\Documents and Settings\All Users\Application Data\PDICRM\PDICRM.ini** this may be different depending on your Windows operating system.

I.2 Data Location

The data location you enter for the path to the data either within the Aliases file on the Firebird server or from within the CRM user application is always relative to the Firebird server. The firebird also requires that the data is on a physical drive attached to the server machine, i.e. you can not have the data mapped to another machine from the remote server.

So, if we wish to store the data in a directory on the **C:** drive where the Firebird server is installed, we would enter the path as **c:\pdicrm\pdicrmdata.fdb**.

When you set up the remote user machine you simply enter the path as **c:\pdicrm\pdicrmdata.fdb** as the Firebird server will look to it's own drive structure to connect to the database. Even if you have a mapped drive from the users machine to the Firebird server you would NOT enter **p:\pdicrm\pdicrmdata.fdb**, as the Firebird server would be looking for a mapped drive from the server machine. The same is true if you try and enter a UNC path name i.e. `\\SERVER01\Share\pdicrm\pdicrmdata.fdb`

I.3 CRM Data Creation

The application **CRMNewdb.exe** will allow you to create the new CRM firebird database. Even if you are converting from a prior data version you will need to create the Firebird database.

When you start this application a screen similar to the following will be loaded. The **[Firebird connection settings]** will display and allow the connection settings to be altered as with the [CRM Connection](#) application.

NB: We recommend that you run this from the Firebird server, and make sure that the folder you wish to create the new database in already exists.

PDI CRM Database creation tool

Enter new CRM Database to create (include required path relative to Firebird server)
 on PDISPIRITXX

Please select Pastel data to link with (directory must be available to all users)

ODBC Report DSN (if default PDICRMPASTEL is used it will be updated with pastel company)
 ▼

If you are using the default ODBC (PDICRMPASTEL) please supply the pervasive server, username and password used to connect. The pervasive entry will be updated with these details.

Pervasive Server name	User name	Password
<input type="text" value="PDISPIRITXX"/>	<input type="text"/>	<input type="text"/>

Data location relative to Pervasive server: Show characters

If new CRM data and not being updated then transfer customer notes to CRM

Enter CRM Database: The path and database name relative to the Firebird server that you wish to create.

NB: The folder must already exist on the Firebird Server

Pastel directory : Enter the Pastel directory that you wish to link CRM data with.

ODBC Report DSN: By default the system will create and maintain an ODBC DSN named **PDICRMPASTEL**. If you are running a Pervasive SQL Server version of the software we recommend that you create your own DSN and set the name here. CRM will then not attempt to make any changes to the DSN used for the reporting.

Pervasive server name: Enter the Pervasive machine name that is used to connect to the Pastel data. This would normally be the local workgroup on your machine. If you are using the Pervasive SQL Server we recommend that you set up your own DSN using the correct Pervasive ODBC Driver.

Username / Password: If your Pervasive connection requires a user name and password then enter the details here.

Pastel data location: Enter the Pastel data path relative to the Pervasive Server name enter aboth. So if you have specified the local machine name and your Pastel data is on the **P:** drive then this would be similar to **P:\pastel_folder\your_company**. If you specified a remote machine name that has the data locally then this would be similar to **c:\pastel_folder\your_company**

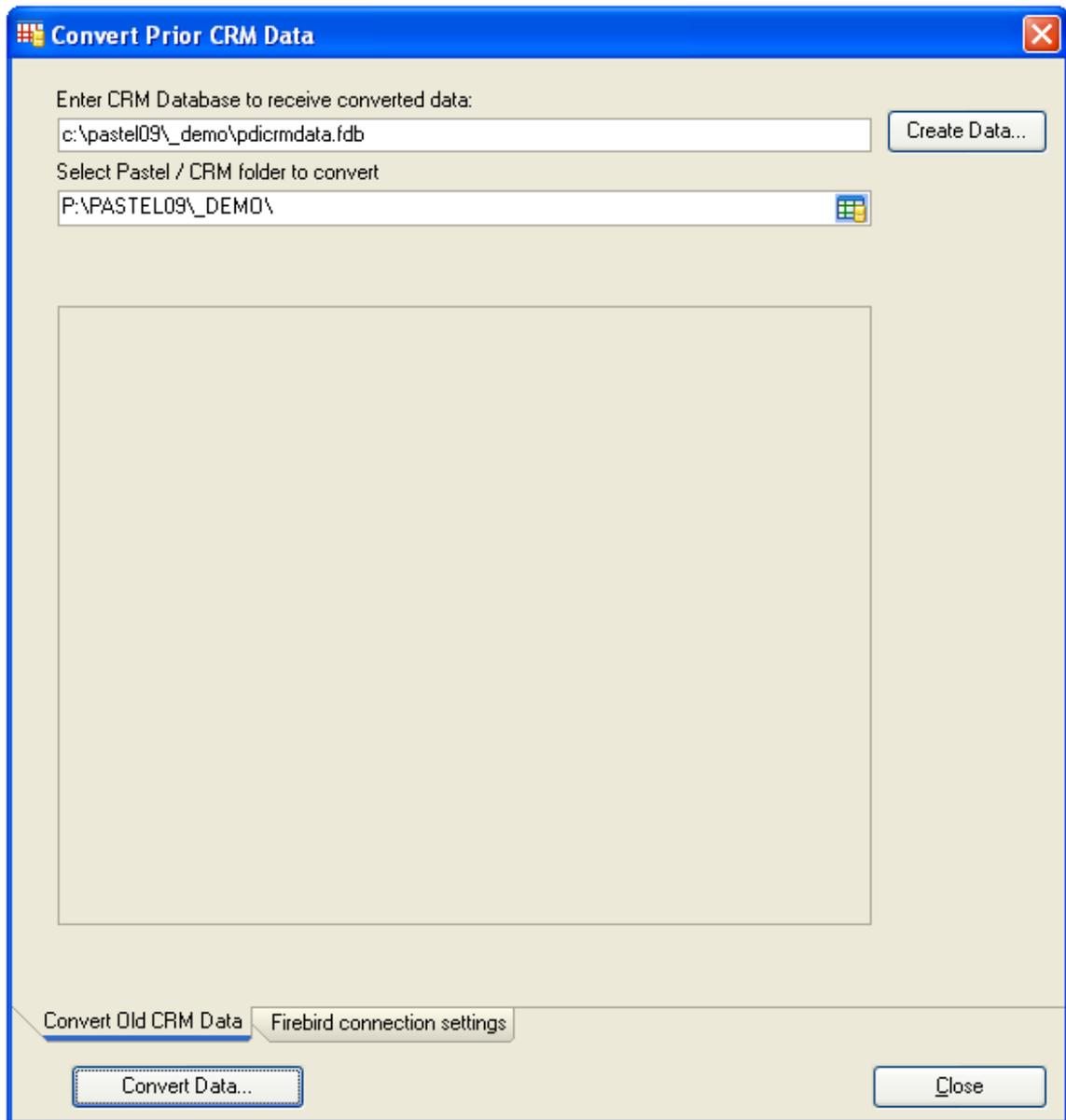
If you are setting up a new CRM database and will not be converting a prior version of CRM data then you can have the conversion process transfer the notes from the Pastel data to the new CRM database. Tick the box if you wish this to happen.

Once you have made the settings press the **Create CRM Database** button to start the process.

Pervasive ODBC settings: this settings are used for the reports run within CRM, if they are incorrect you will still be able to connect and run the application and view the data, only the reports may not function.

I.4 CRM Convert data

If you are have a prior version of PDI CRM then you can convert the existing data to the new Firebird database using the application **CRMConvert.exe** When you start the application a screen similar to the one below will be started.



The **[Firebird connection settings]** will display and allow the connection settings to be altered as with the [CRM Connection](#) application.

CRM Database: Enter the path or Alias name of the new CRM data created with the [CRM Data creation](#) utility. This path is relative to the Firebird server.

Select Pastel / CRM folder: Enter the path to the Pastel folder holding the CRM data, this path is relative to the machine you are using to run the application.

Once the settings have been made press the **[Convert Data]** button to start the conversion process.

I.5 Firebird Alias

Firebird allows an alias name to be set-up which handles the location of the data. Using an alias name makes it easier if you wish to move the data as you only need to alter the firebird alias configuration file and therefore do not need to alter the users local individual settings.

Location of Alias Configuration File: The Firebird alias configuration file `aliases.conf` is located on the main Fire bird install directory (if you have installed to the default then this will be `c:\program files\Firebird\Firebird_2_x\`).

This file can be opened with any standard text editor, such as the Windows NotePad.

When you open the file, the file header will give you information on how to setup the alias which is simply

Alias Name = Data location on firebird server

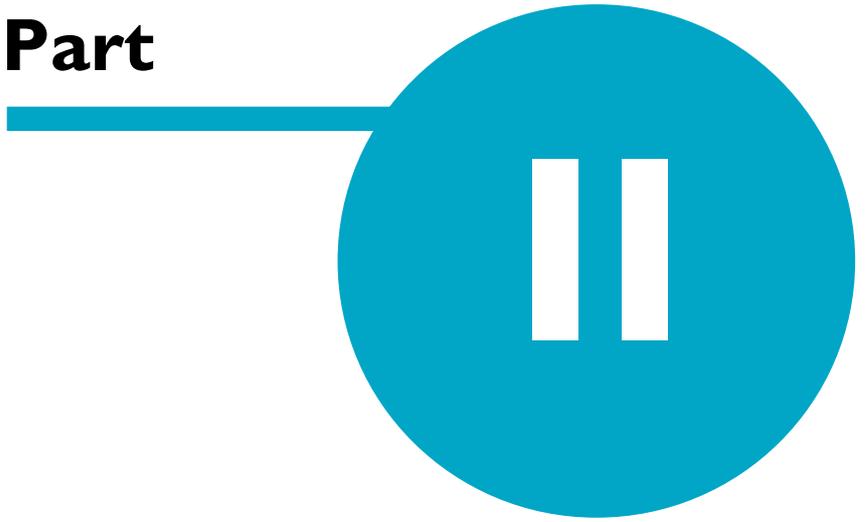
So for example we may set up the following as our Alias to the CRM2008 data.

```
#
# List of known database aliases
# -----
#
# Examples:
#
# dummy = c:\data\dummy.fdb
#
CRM2008 = c:\pastel09\_demo\pdicrmdata.fdb
```

When you make a connection on a user machine, you simply enter **CRM2008** (in this example) as the location of the firebird database. The firebird server will then make the mapping from the alias name to the actual data using the `aliases.conf` file.

NB: Please note you must create the CRM Firebird database first using the 'CRM Data Creation' utility before setting an alias information

Part



2 CRM Start up

The application **CRMLite.exe** is the main Windows application file that user requires to get access to the CRM desktop and functionality.

When you start a splash screen similar to the following will be displayed, giving you details on the current status of the start up.



A log in screen will then be displayed giving you access to the Data source name and connection settings.

2.1 CRM Login

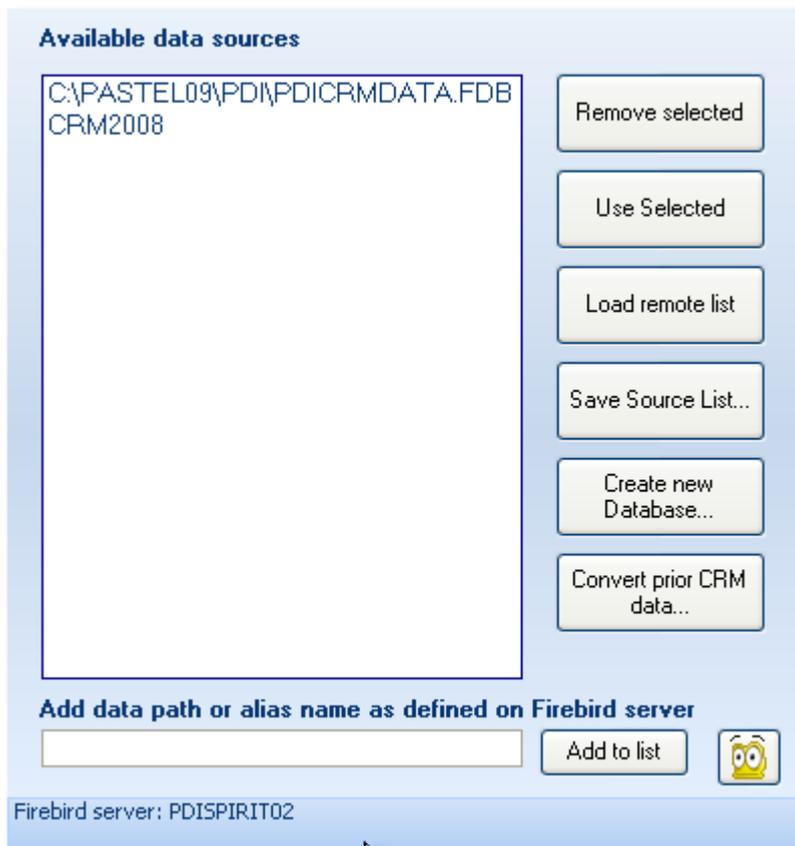
The CRM log-in screen gives you access to the CRM datasource, the Connection settings and the log-in details. The Login uses Firebird security to control access to the CRM database. Initially only the Firebird System DBA user (**SYSDBA**) will have access to the database. The initial password for the Firebird server is **masterkey**, Firebird users and passwords are case sensitive.



Connect to data source: You can either enter the path (relative to the firebird server) or the alias name as defined on the firebird server.



You can also use the  icon to get access to the machine(s) data source list. When you click this button a screen similar to the following will be loaded. This screen allows you to control a list of CRM datasources that the machine has access to. This screen also gives you access to the applications required to Create new database and Convert prior CRM data.



2.2 CRM Desktop

Once you have successfully logged in, the CRM Desktop will be loaded and you will have access to the Pastel Customers, CRM prospects, Task, Sales Opportunities and the other CRM functionality.

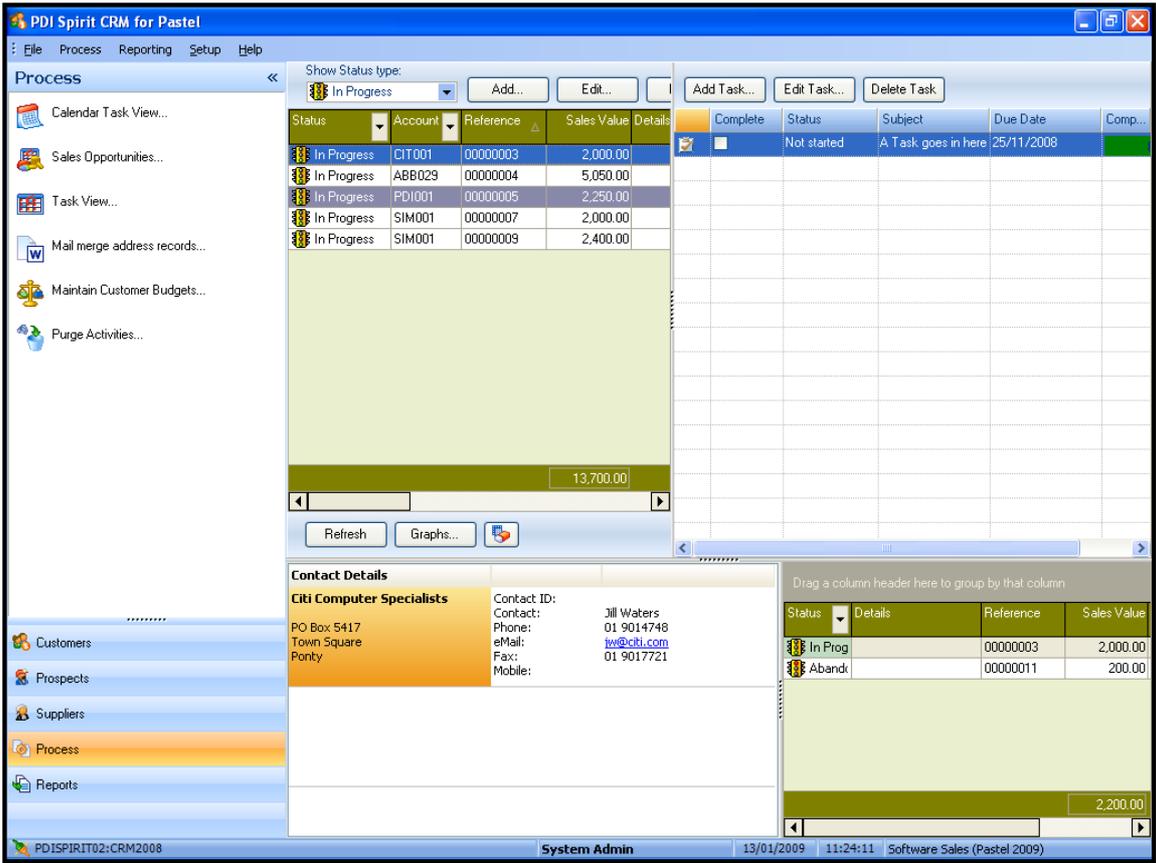
If you fail to gain access, check the error message that will be displayed, review your connection settings, database connecting to, username and password

CRM Customer Link

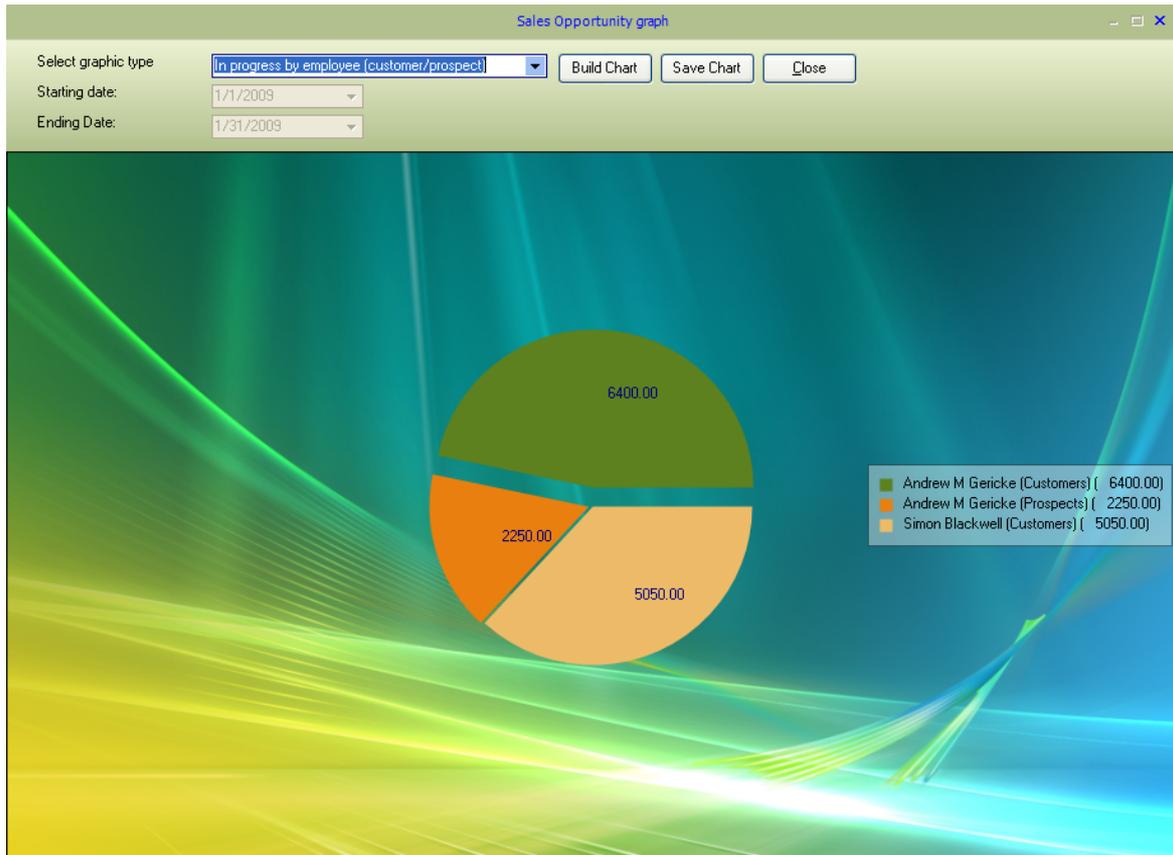
The screenshot displays the 'PDI Spirit CRM for Pastel' application window. The title bar shows the application name and standard window controls. The menu bar includes 'File', 'Process', 'Reporting', 'Setup', and 'Help'. The main interface is divided into several sections:

- Customers List:** A table on the left side of the main area listing various customer accounts with columns for Code, Name, and a count. The list includes entries like 'Albott Limited', 'Ackerman Mr R', 'A & G Consultants', etc.
- Customer Details Form:** A form on the right side for editing the selected customer, 'Albott Limited'. It contains fields for:
 - Customer account nr: ABB029
 - Customer account name: Albott Limited
 - Street: P O Box 30498586
 - Area: Germiston
 - Town: 2340
 - County: South Africa
 - Postal code: (empty)
 - Customer category: No Category
- Pastel user defined fields:** A section on the right with input fields for Website FTP, FTP Password, Product, and Lead Source.
- Home (R) Table:** A table below the form with columns: Code, Sales person, Contact, Telephone, Cell Phone, Fax No., and Email. It shows two rows of data for contact details.
- Navigation and Tools:** A bottom toolbar with buttons for 'Contact Details...', 'New Contact for Account...', and 'New Note / Activity / Task...'. A status bar at the very bottom shows 'System Admin', the date '13/01/2009', and time '11:23:44'.

CRM Sales opporunities



CRM Sales Pipe line Graphs



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