CRM Required Components

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Table of Contents

Part I Introduction 3

Part II Firebird Install : Welcome 5

1 Firebird Install - License Agreement ... 6
2 Firebird Install - Information ... 7
3 Firebird Install - Select Destination ... 8
4 Firebird Install - Components ... 9
5 Firebird Install - Start menu folder ... 10
6 Firebird Install - Addtional Tasks ... 11
7 Firebird Install - Ready to Install ... 12

Part III Firebird ODBC - Welcome 14

1 Firebird ODBC - License ... 15
2 Firebird ODBC - Information ... 16
3 Firebird ODBC - Destination ... 17
4 Firebird ODBC - Components ... 18

Part IV Crystal XI Runtime - Welcome 20

1 Crystal XI Runtime - Select Destination ... 21
2 Crystal XI Runtime - Ready to Install ... 22
3 Crystal XI Runtime - Installing ... 23
4 Crystal XI Runtime - Complete ... 24

Part V CRM Install - Welcome 26

1 CRM Install - License ... 27
2 CRM Install - Location ... 28
3 CRM Install - Components ... 29

Index 30

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Part

I Introduction

PDI CRM Version 4, requires a number of components to be installed and functioning before the application will run correctly.

The install routines are designed to be basically, a next, next, next install process as most of the defaults are set.

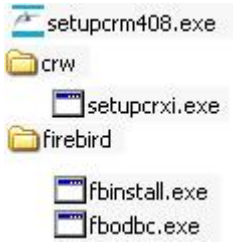
The required components are as follows:

Firebird Server/Client: CRM uses the Firebird RDBMS SQL server to access the data. One machine must have the Firebird server software installed and running, all additional workstations must have the client component installed.

Firebird ODBC: An ODBC DSN is used as the connection for the reports within the CRM application. This is required on all workstations that will use CRM.

Crystal XI Runtime: The reports use the Crystal XI runtime engines to produce the output. Reports can be written in Crystal 8, 9 or Crystal version 10. All the default reports that come with the application have been designed using crystal XI. This is required on all workstations that will use CRM.

Automatic call of the setup routines: the CRM setup routine is designed to look for the component install routines in certain folder structure as indicated below. The current CRM install may be named different, but the Crystal and Firebird components should be as shown below.



If the files are named correctly and in the indicated folders then they will be executed during the main installation. You can also run these installs separately before running the main install routine.

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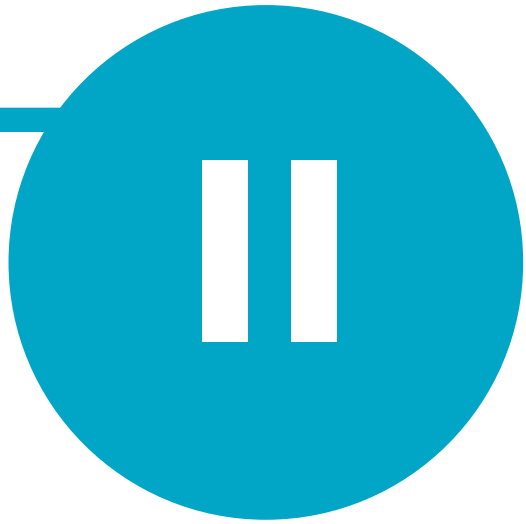
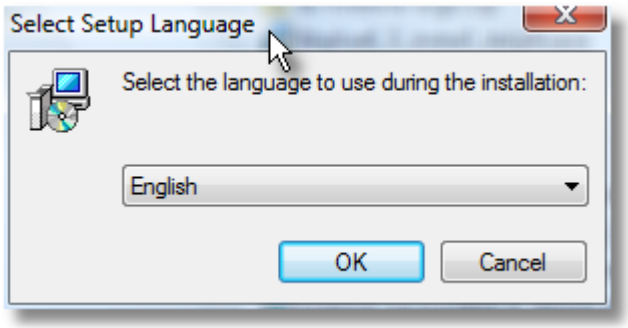


2 Firebird Install : Welcome

Select the Setup Language to run the install routine in.



When you start the Firebird server install, a welcome screen will displayed. The Firebird version to install may be slightly different.
Press [Next] to start wizard driven install

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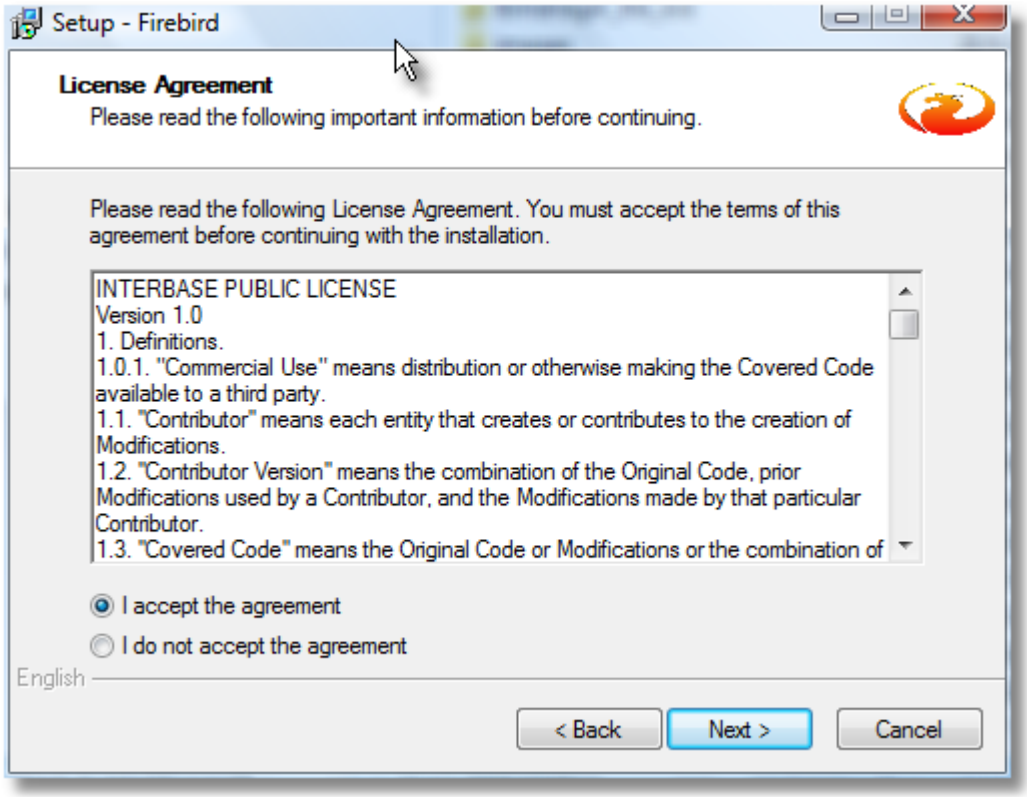
2.1 Firebird Install - License Agreement

Accept the license agreement, and press [Next]



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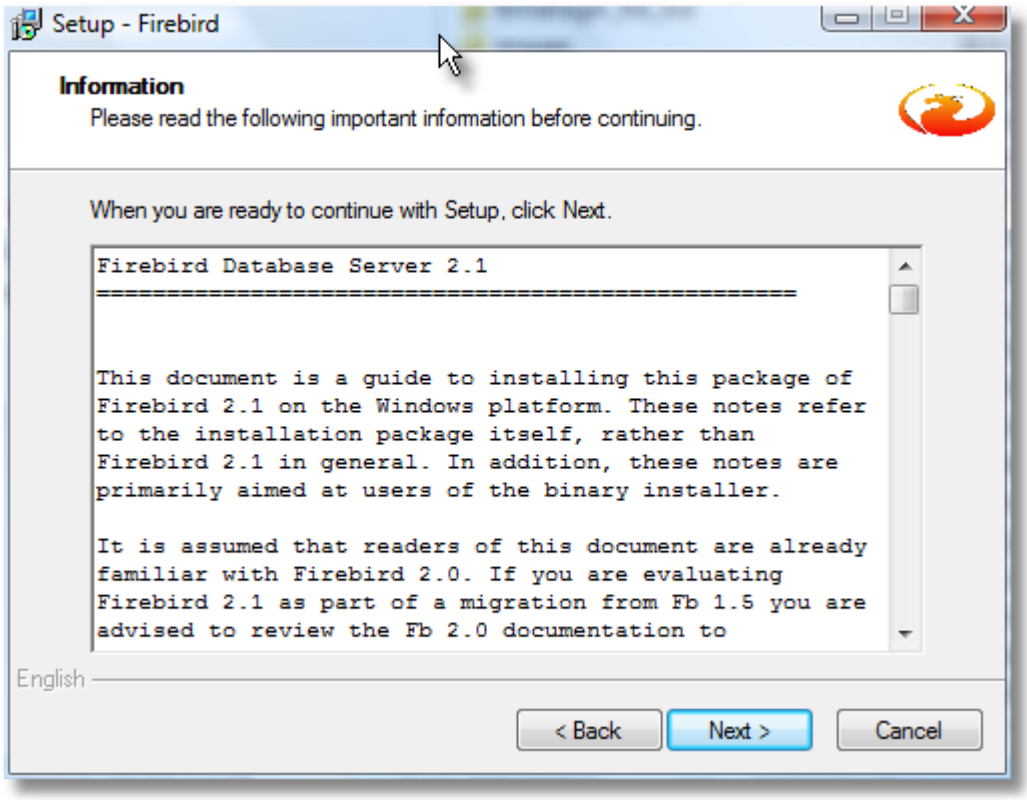
2.2 Firebird Install - Information

This screen has current details and notes on the Firebird Database Server install. Read the contents and press [Next] when you are ready to move on.



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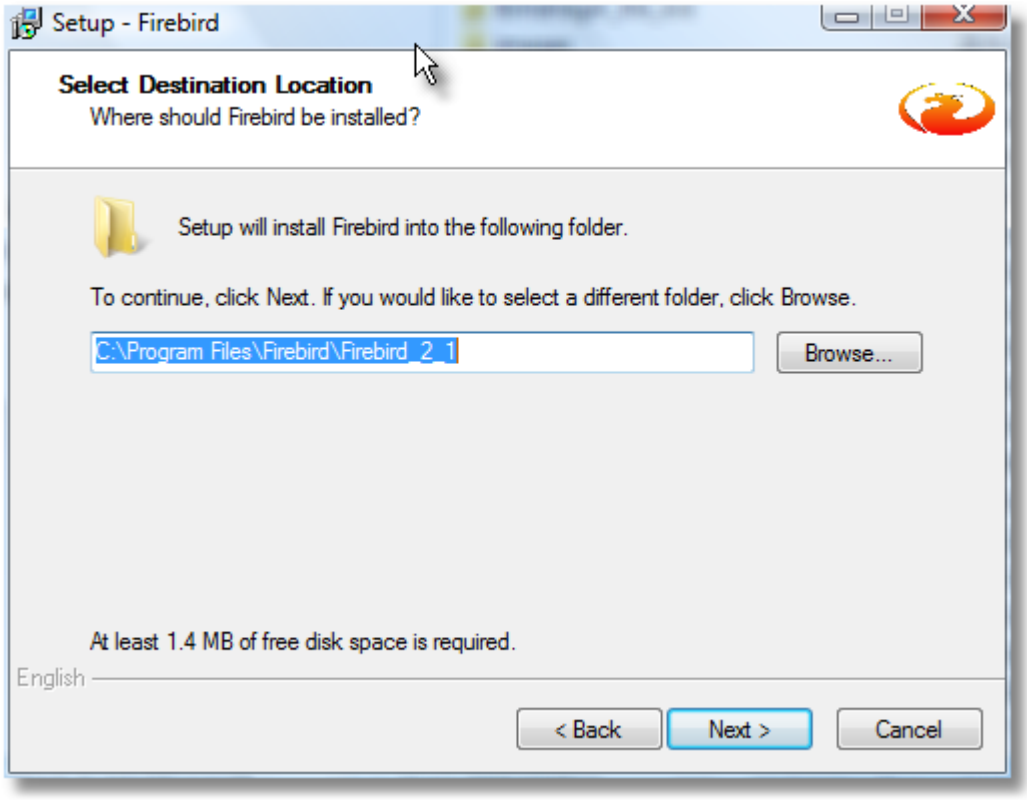
2.3 Firebird Install - Select Destination

Select the destination location where you want to install the Firebird components to.



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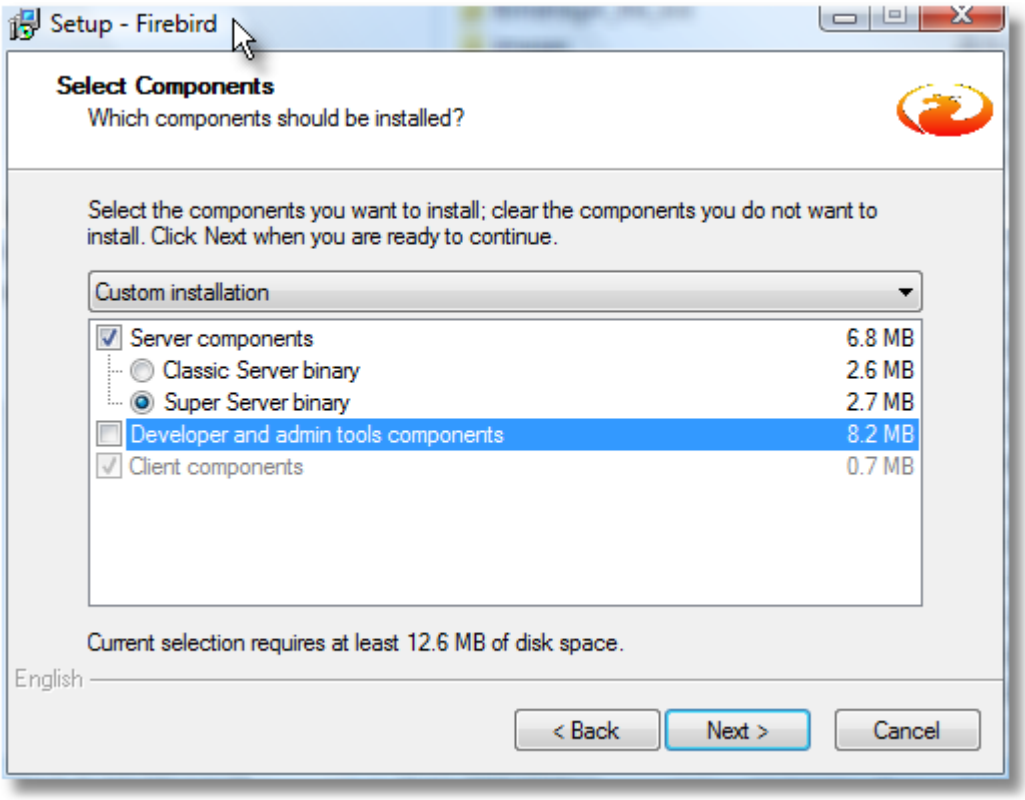
2.4 Firebird Install - Components

Select the components that you want to Install:

Firebird Server - If you are installing the server component, tick the **Server components** option and set the radio button to **Super Server Binary**.

The 'Developer and admin tools components' can be unticked.

Firebird Client - Remove the tick from the **Server components** and the default **'Client components'** will be installed.



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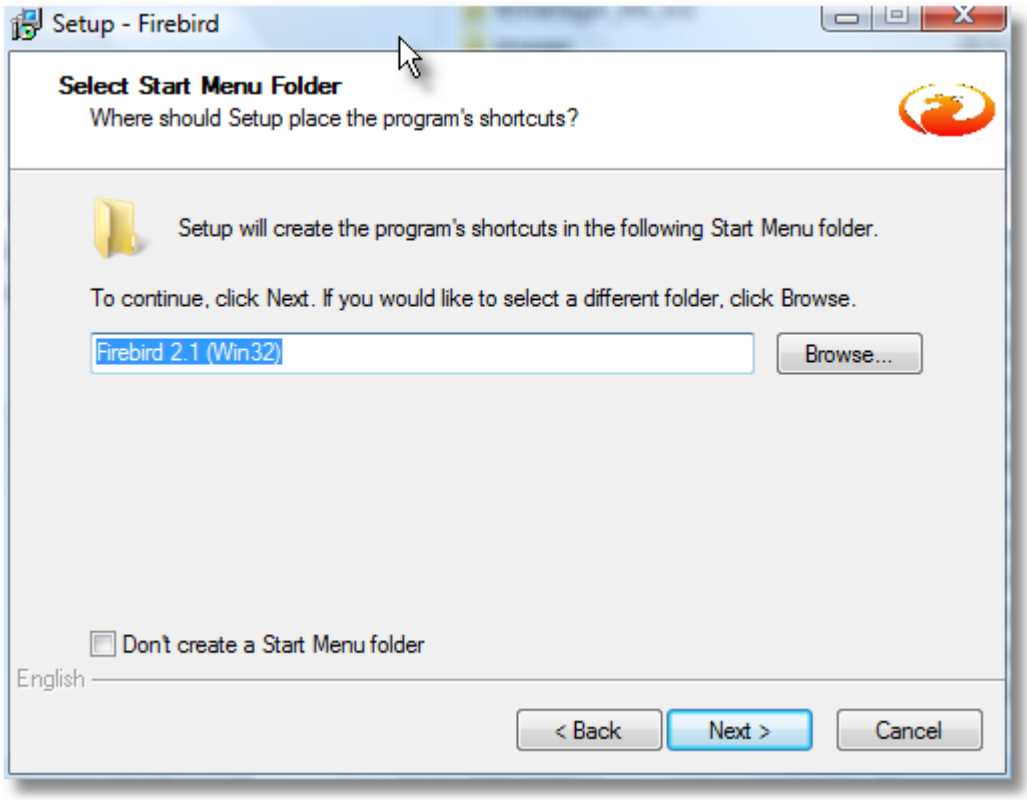
2.5 Firebird Install - Start menu folder

Enter the start menu folder that will be created during the installed with the required program's shortcuts.



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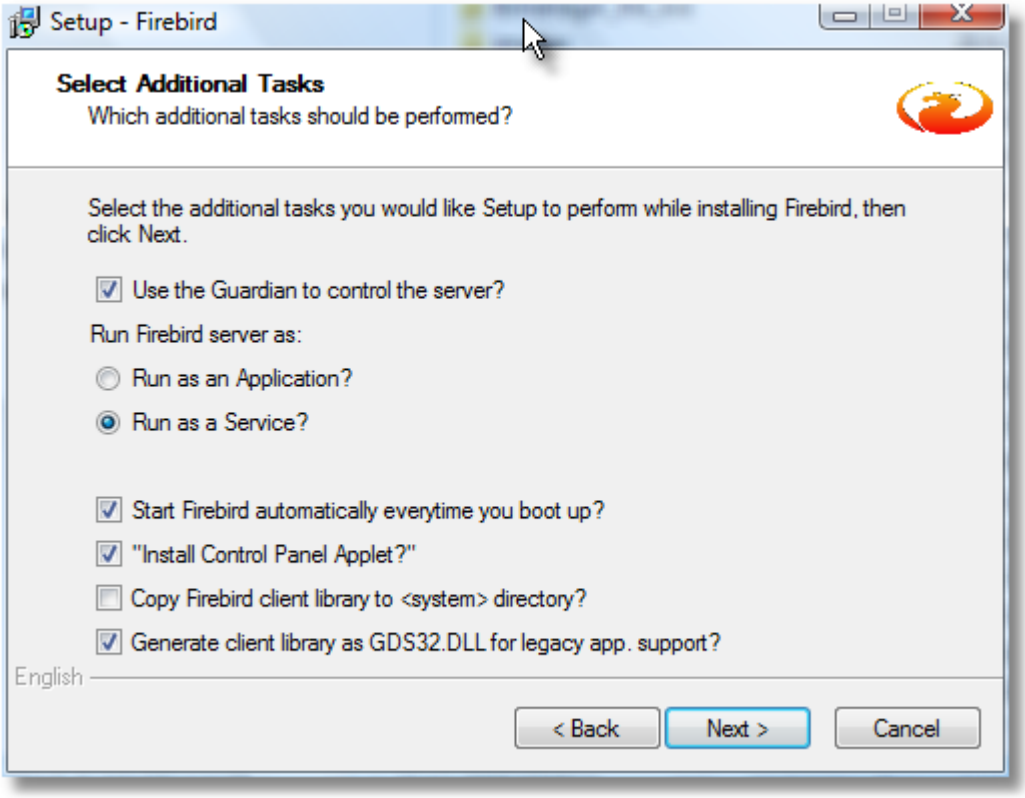
2.6 Firebird Install - Addtional Tasks

Select the '**Additional Tasks'** that you want to install, the screen below shows the default options that are recommended. If you already have Interbase applications then you should not **Generate client library as GDS32.DLL for legacy app.support?** The other options should be set as shown, unless you have good reason not to.



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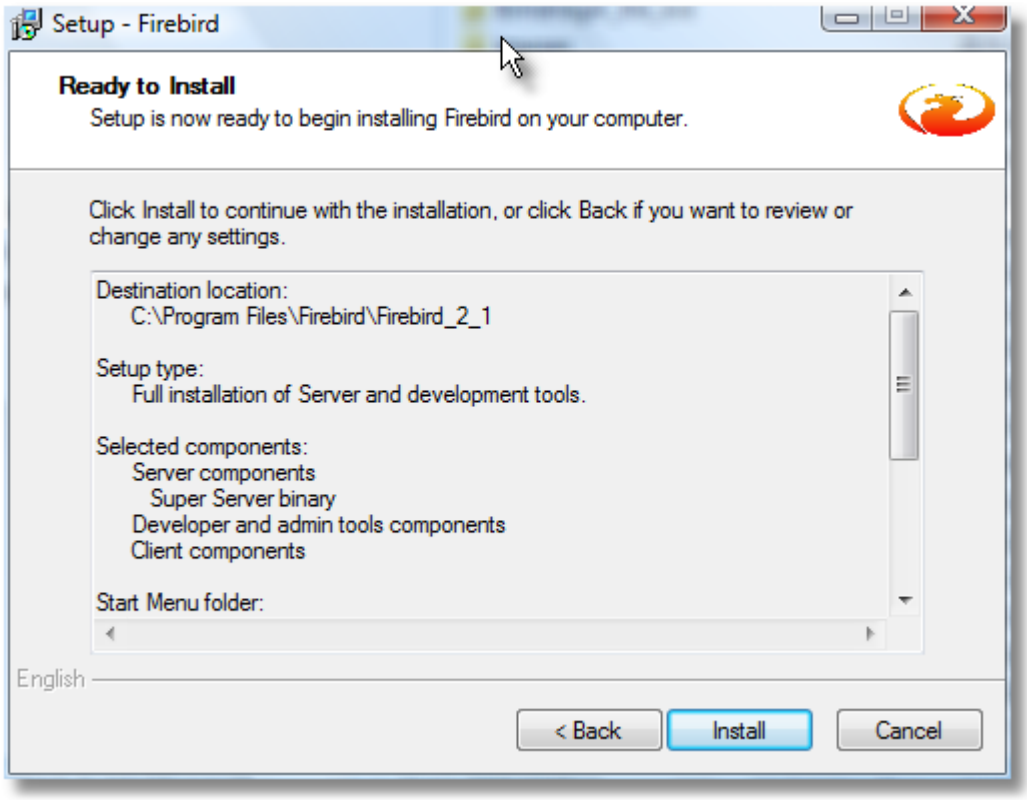
2.7 Firebird Install - Ready to Install

Once you have made your selections, review the settings and press the [Install] button to continue. The selected Firebird components will be installed.



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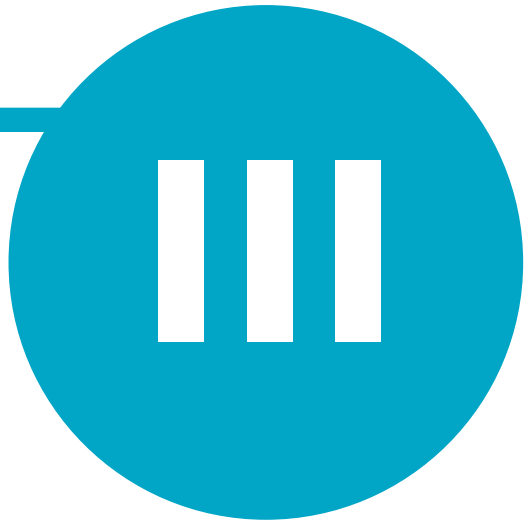

3 Firebird ODBC - Welcome

The welcome screen gives you the current install version of the ODBC driver, this may be different if you a newer install is available.

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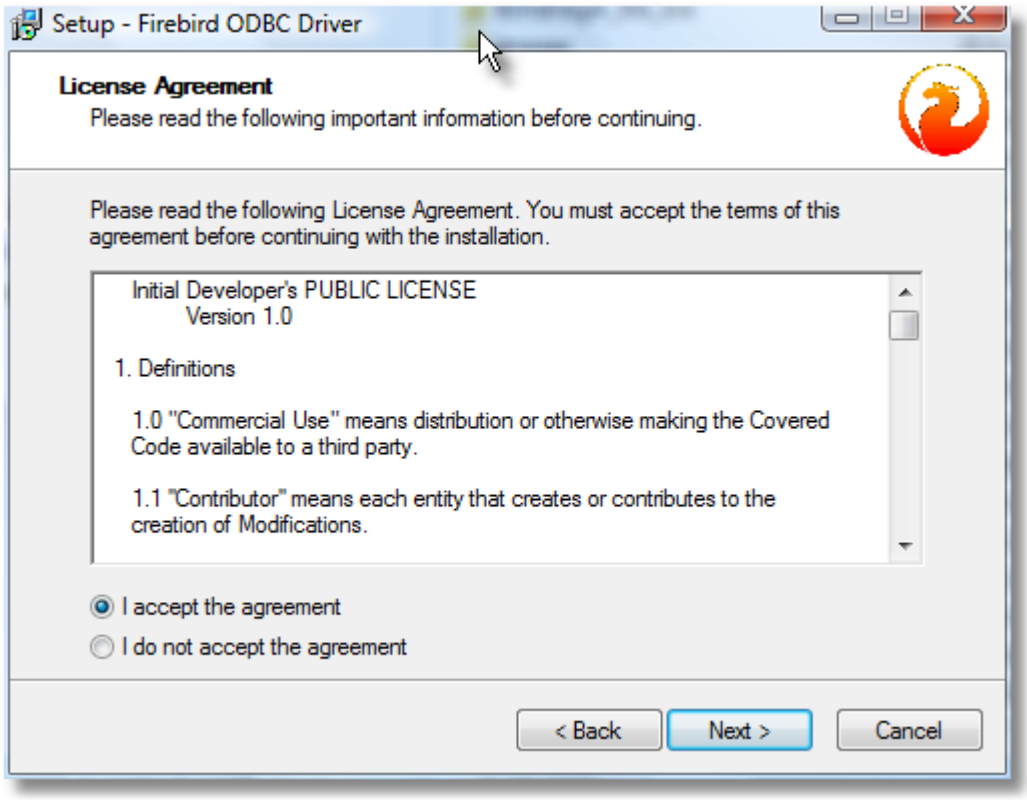
3.1 Firebird ODBC - License

Confirm agreement to the **License Agreement** and press the **[Next]** button.



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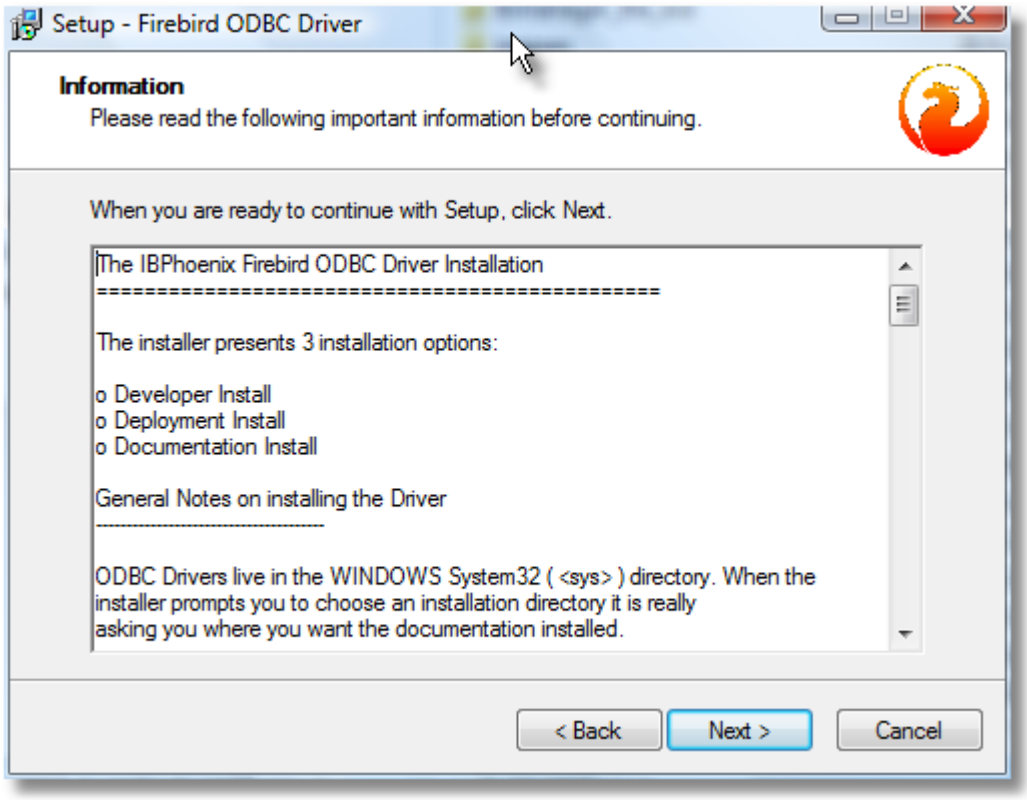
3.2 Firebird ODBC - Information

This screen shows the latest information regarding the installation of the Firebird ODBC. Read this before continuing and when you are ready press the [Next] button.



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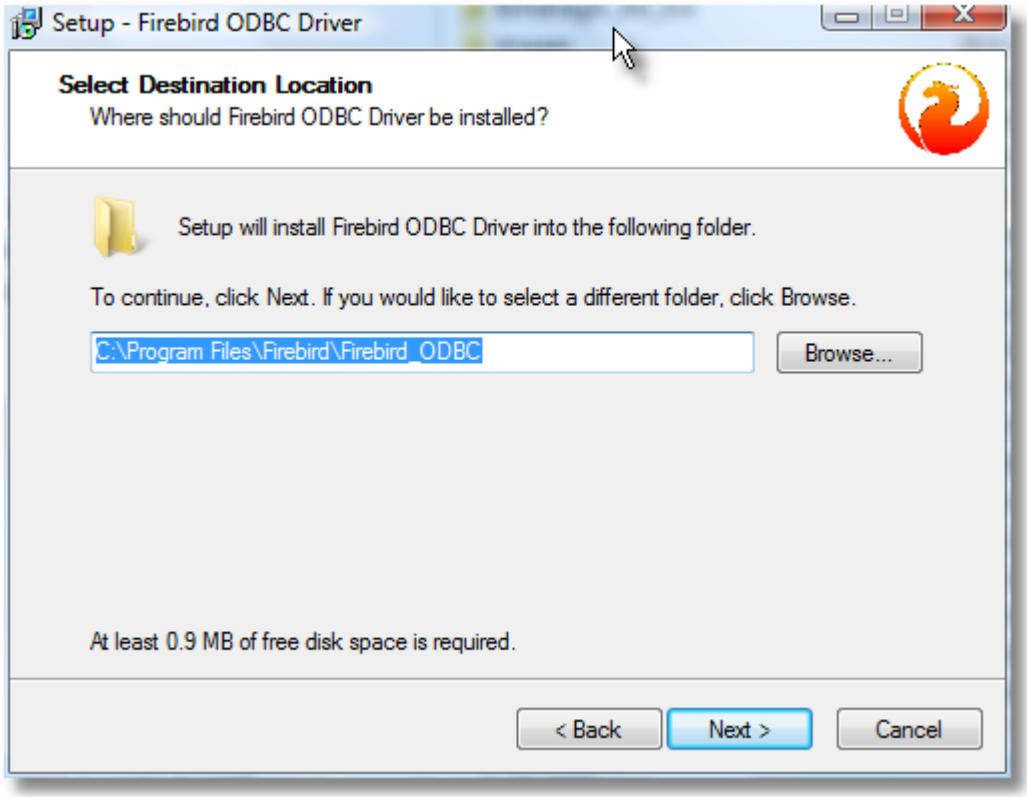
3.3 Firebird ODBC - Destination

Select the destination location that you wish to install the required files to.



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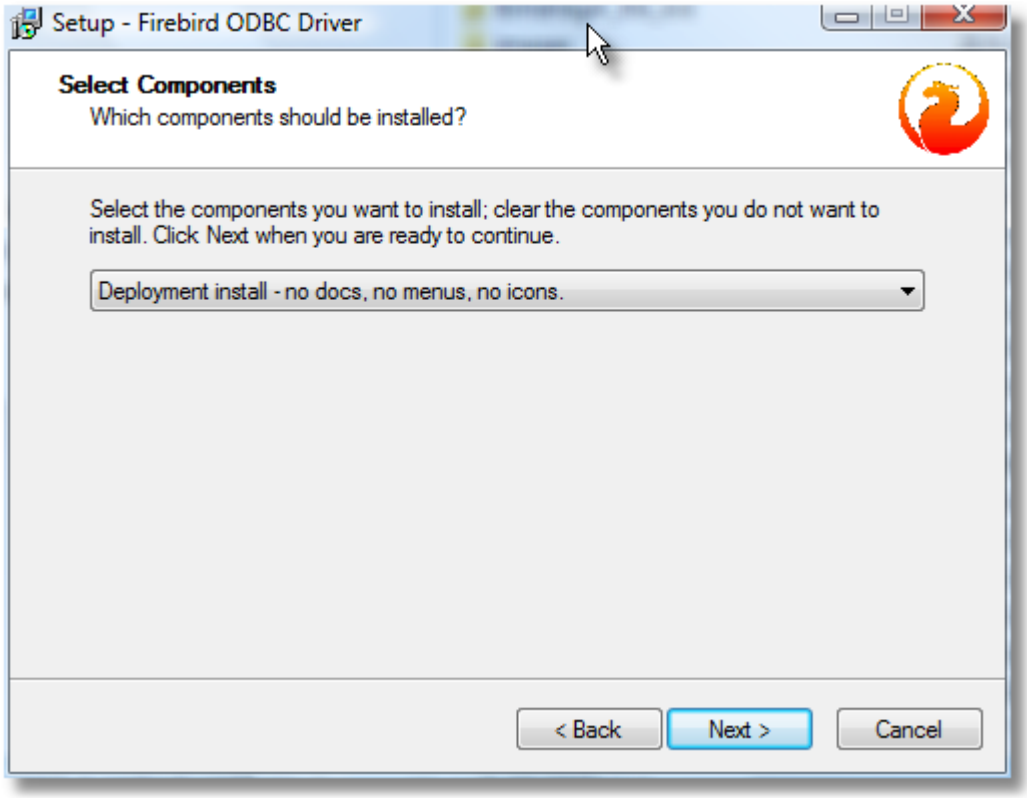
3.4 Firebird ODBC - Components

Select the components that you wish to install - we recommend that you select the **Deployment install - no docs, no menus, no icons**.



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Part

4 Crystal XI Runtime - Welcome

The crystal XI runtime setup is made up of Install merge Modules supplied by Business Objects/SAP. This install routine will ensure that these merge modules are installed to the correct location. Press the [Next] button to start the install process.

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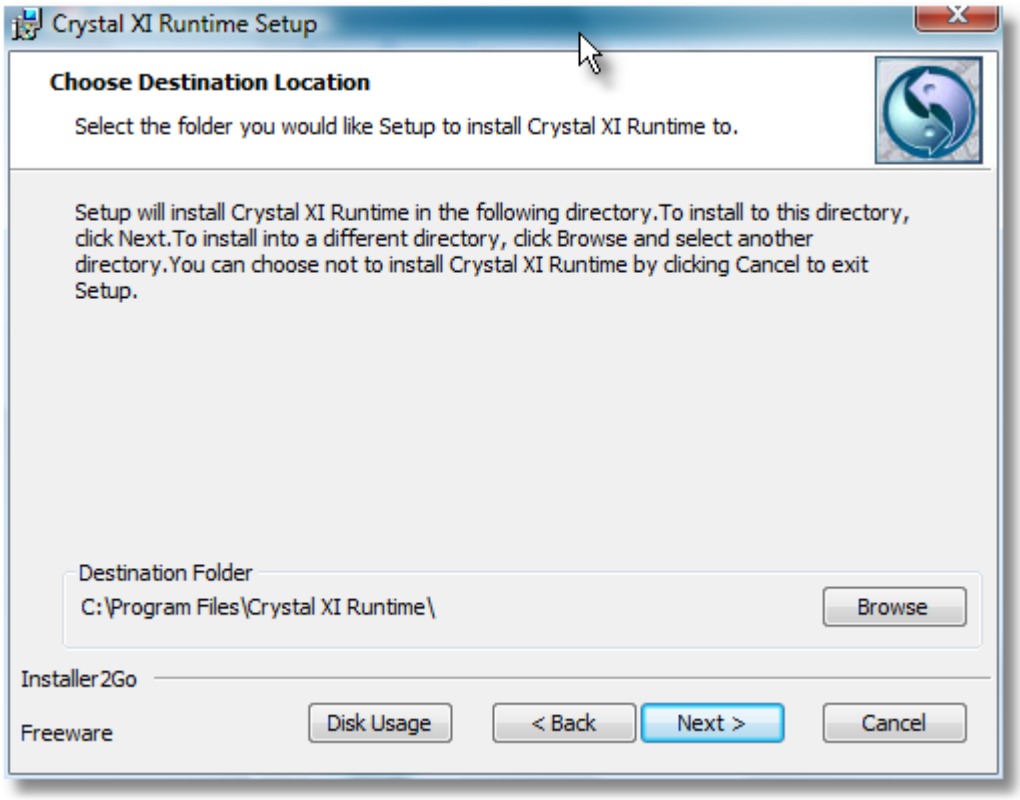
4.1 Crystal XI Runtime - Select Destination

Select the install directory to install non-merge module files to. The Merge modules will install their files to the expected folder required by Crystal XI. Press [Next] to continue.



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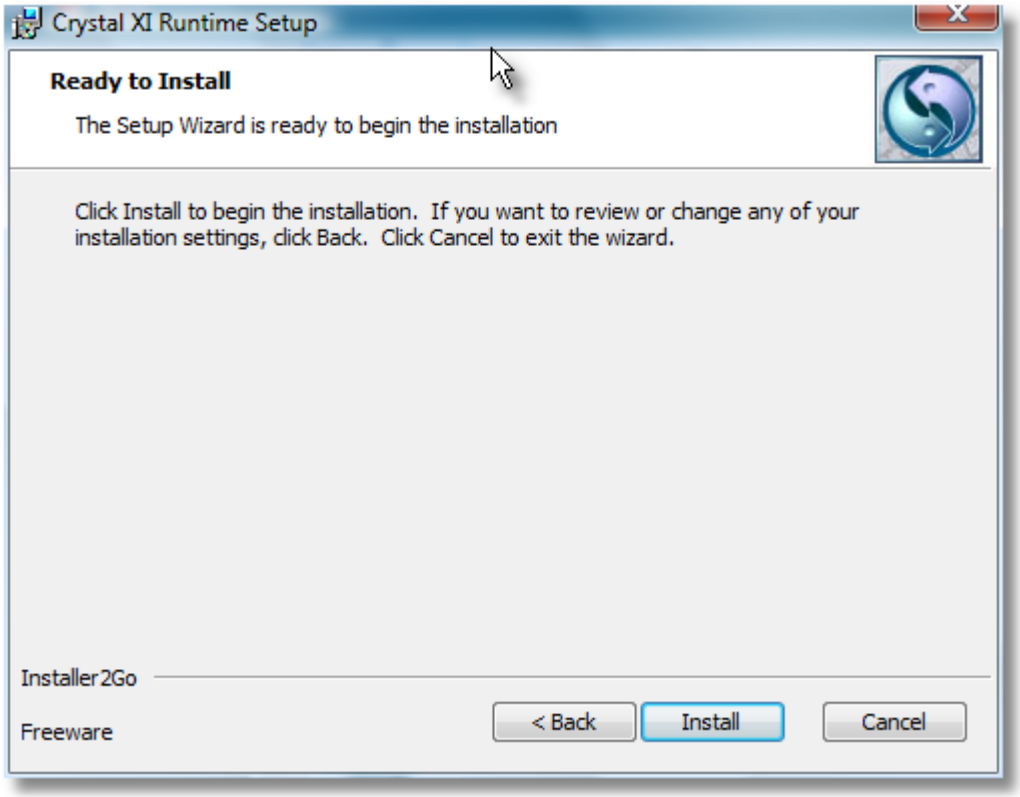
4.2 Crystal XI Runtime - Ready to Install

Press the [Install] button to start the installation process.



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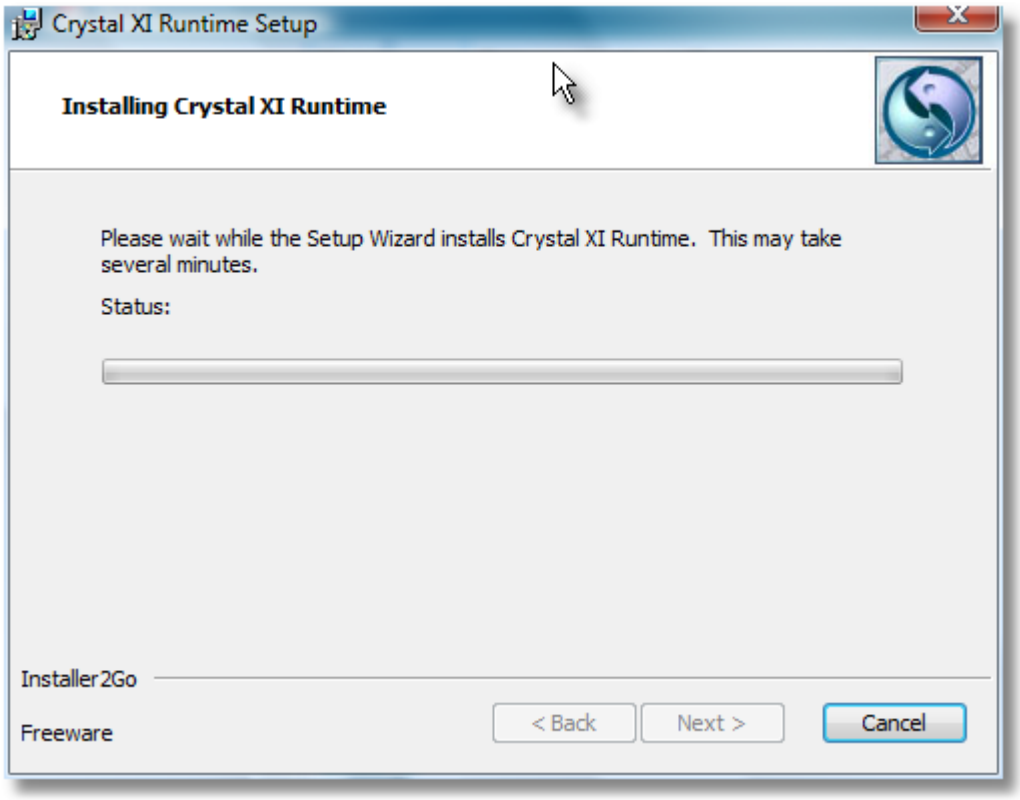
4.3 Crystal XI Runtime - Installing

This screen will give you the current status of the install routine, the installation is complete press the [Next] button.



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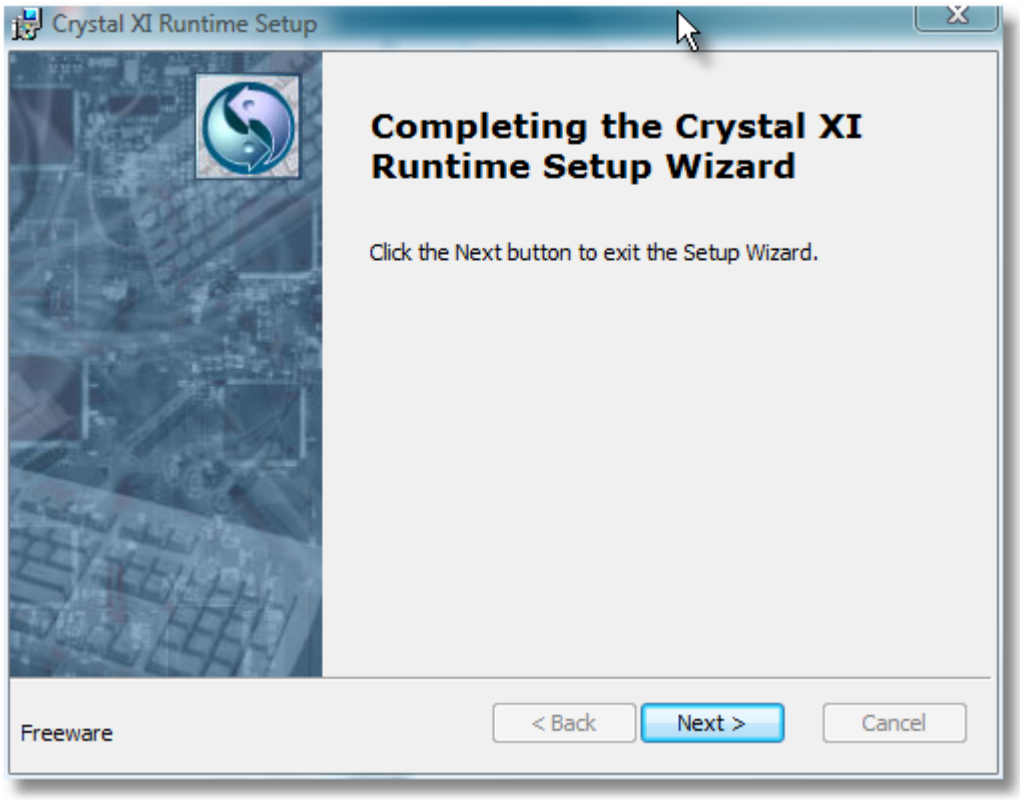
4.4 Crystal XI Runtime - Complete

Once this screen is reached your install has been completed successfully and the required Crystal XI runtime files will have been installed.



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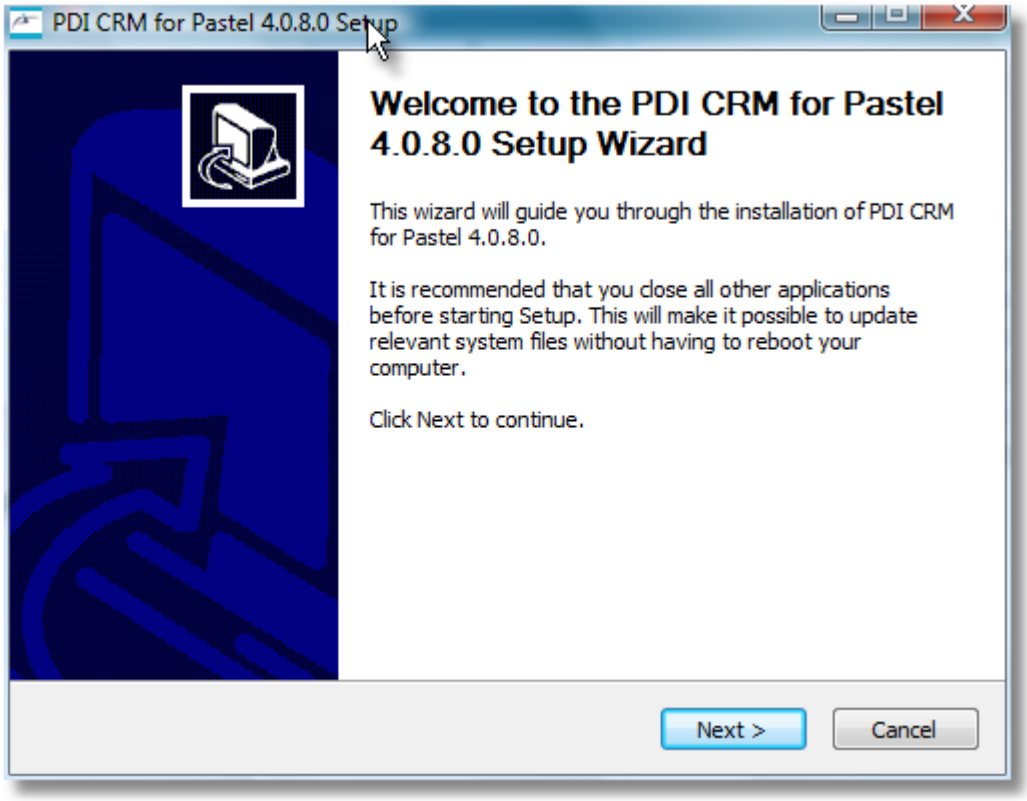
Part

5 CRM Install - Welcome

The welcome screen will indicate the version of PDI CRM for Pastel that you are installing. The version you see may be different from the screen shown below. Press the [Next] button to continue.



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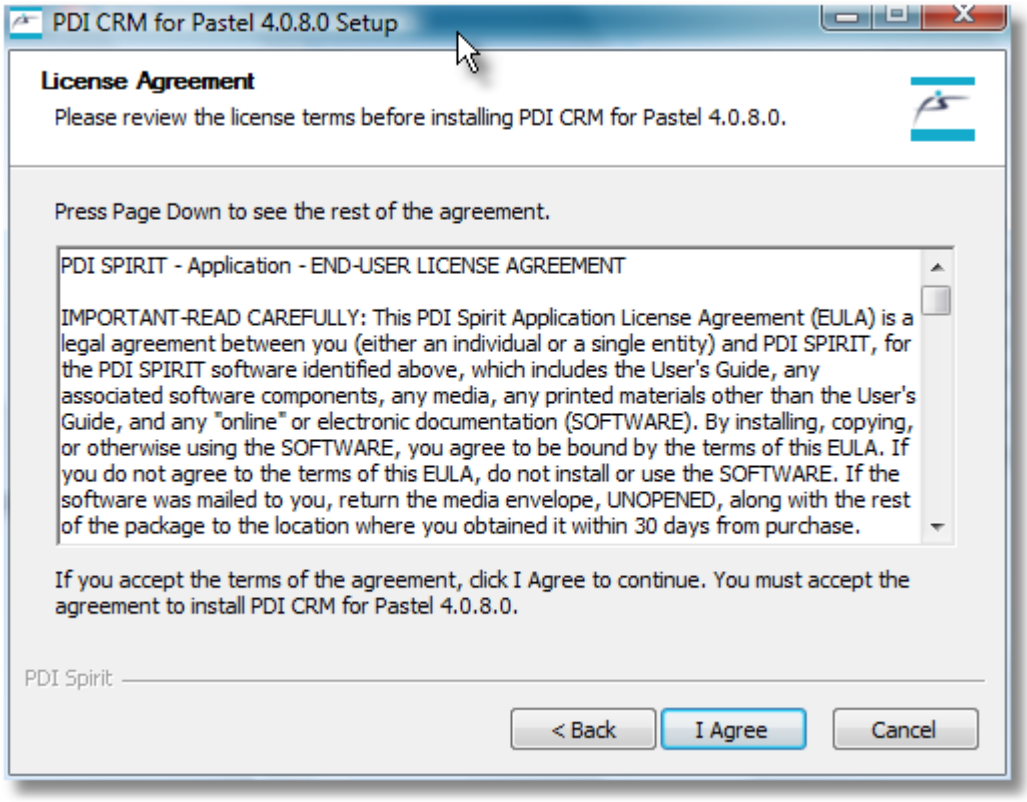
5.1 CRM Install - License

Press [I Agree] to continue the installation process.



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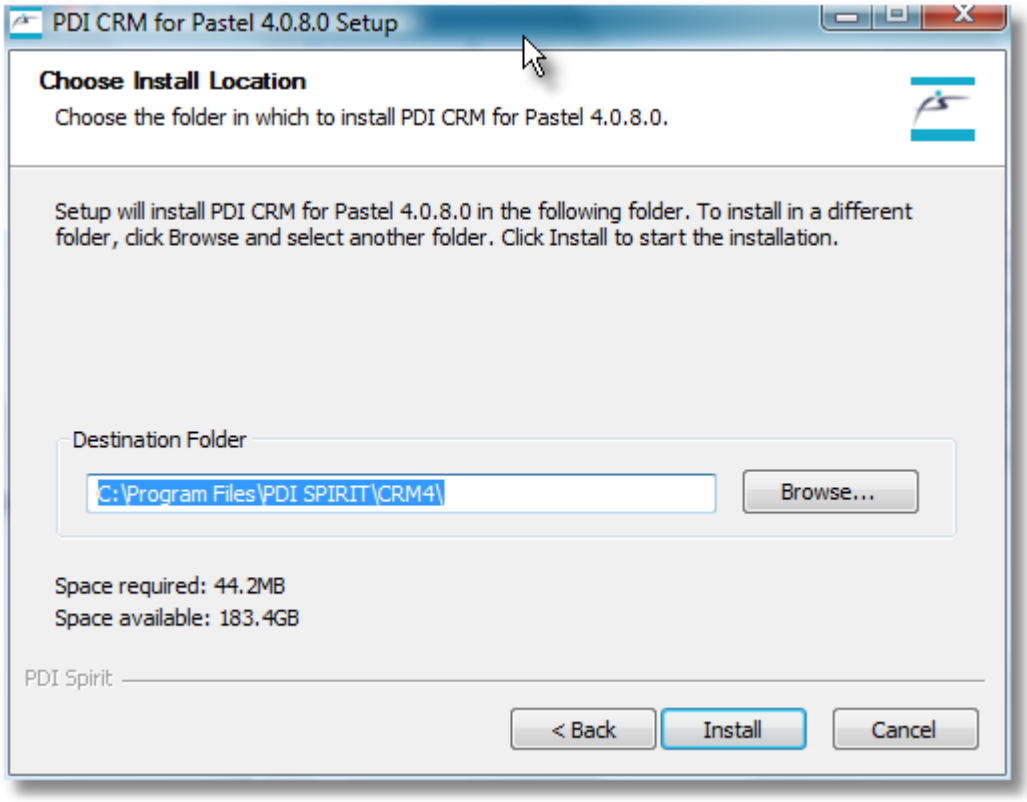
5.2 CRM Install - Location

Select the destination folder that you wish to install CRM files to.



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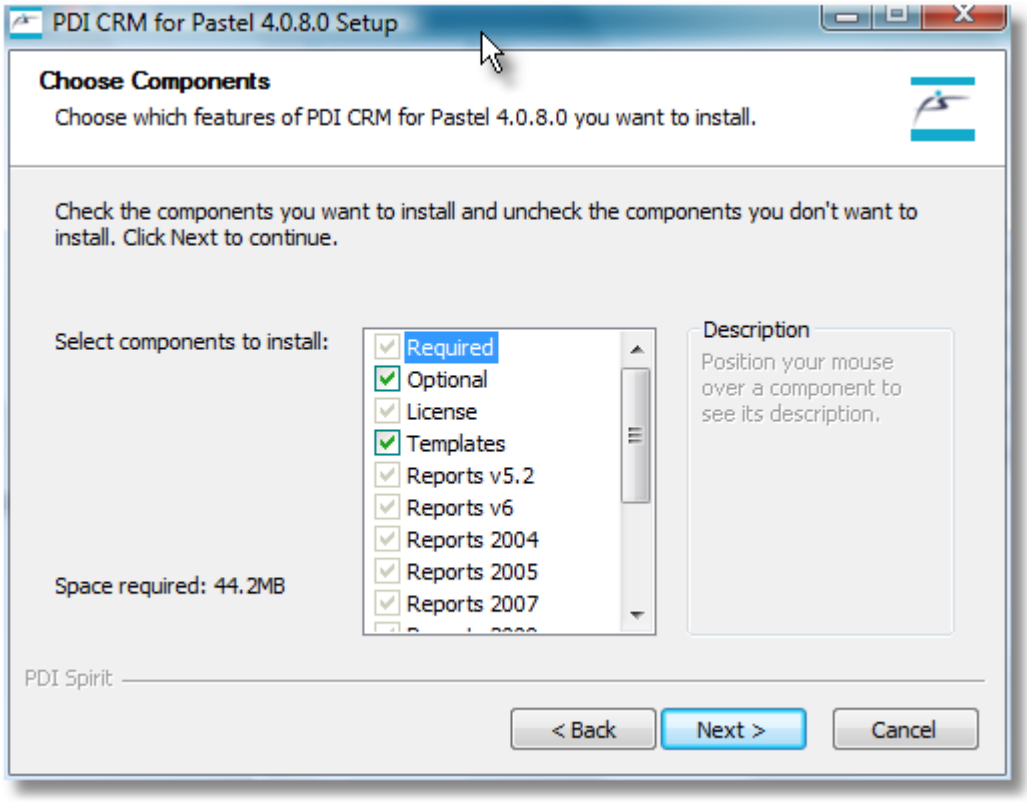
5.3 CRM Install - Components

Select the components that you wish to install and press [Next] to start the process.



Some of the components are mandatory, but some can be selected.

Optional - This includes the applications that will enable the user to create a new CRM database and convert data from the prior version of CRM.

Templates - This will install example mail merge and task word documents that can be used as the basis to create your own templates.

Firebird Server - If the firebird install is present and in the expected folder then you can have the install routine execute it during the install.

Firebird ODBC - If the firebird ODBC install is present and in the expected folder then you can have the install routine execute it during the install.

Crystal XI - If the Crystal XI install is present and in the expected folder then you can have the install routine execute it during the install.

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Index

- C -

CRM Install Components 29
CRM Install License 27
CRM Install location 28
CRM Install Welcome 26
Crystal XI Complete 24
Crystal XI runtime Installation 23
Crystal XI Runtime Welcome 20
Crystal XI Runtine - Ready to 22
Crystal XI Selection destination 21

- F -

Firebird 3
Firebird Additional Tasks 11
Firebird Client 3
Firebird components 9
Firebird Information 7
Firebird License Agreement 6
Firebird ODBC 3
Firebird ODBC - License 15
Firebird ODBC - Welcome 14
Firebird ODBC Components 18
Firebird ODBC Destination 17
Firebird ODBC Information 16
Firebird Ready to Install 12
Firebird Select Destination 8
Firebird Server 3
Firebird Start menu folder 10
Firebird Welcome 5
Folder structure 3

- I -

Install structure 3

- R -

Required components 3

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