



Installation Guide

QAD Customer Relationship Management

Overview
Installation
Post-Installation Configuration
Upgrade
Compilation with Progress 64 Bit

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What Is in This Guide?

This guide describes how to install QAD Customer Relationship Management (QAD CRM), a program designed to assist sales and marketing personnel in their business-generating efforts.

For information about system administration, see *Administration Guide: QAD Customer Relationship Management*.

For end-user information, see *User Guide: QAD Customer Relationship Management*.

Other QAD Documentation

QAD CRM can be integrated with your QAD ERP application to extend its capabilities. For information on QAD Enterprise Applications, see the following:

- For an overview of new features and software updates, see *Release Bulletin*.
- For software installation instructions, refer to the appropriate installation guide for your system.
- For conversion information, refer to *Conversion Guide*.
- For an overview of system features and instructions on navigating the user interface, see *User Guide: Introduction*.
- For detailed information on using system features, refer to the relevant user guide.
- For technical details, refer to *Entity Diagrams* and *Database Definitions*.

For a complete list of QAD documentation, visit the QAD Online Support Center at:

<http://support.qad.com/>

Online Help

QAD CRM has an extensive online help system. For details, refer to *User Guide: QAD Customer Relationship Management*.

QAD Web Site

QAD's Web site provides a wide variety of information about the company and its products. You can access the Web site at:

<http://www.qad.com>

For users with a QAD Web account, product documentation is available for viewing or downloading from the QAD Online Support Center at:

<http://support.qad.com/>

You can register for a QAD Web account at the QAD Online Support Center. Your customer ID number is required. Access to certain areas is dependent on the type of agreement you have with QAD.

Most user documentation is available in two formats:

- Portable document format (PDF). PDF files can be downloaded from the QAD Web site to your computer. You can view them with the free Adobe Acrobat Reader.
- HTML. You can view user documentation through your Web browser. The documents include search tools for easily locating topics of interest.

Conventions

Keyboard Command Summary

The following table provides a summary of the keyboard commands.

Shortcut Key	Description	Applicable To
F1	Displays Help file	Application-wide
ALT + F2	Displays Session and Container Information dialog	Application-wide
ALT + F3	Displays Translation on Demand dialog	Application-wide
F7	Performs a spell check	Editor
CTRL + F4	Displays lookup	Application-wide
Ctrl + F5	Displays Object Details dialog	Application-wide
Insert	Adds record	Browsers

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Shortcut Key	Description	Applicable To
Delete	Deletes record	Browsers
Enter or double-click	Performs default action	Browsers
Ctrl + F	Search and cancel search	Browsers
Ctrl + K	Records count	Browsers
Ctrl + T	Performs sort	Browsers
F5	Refreshes display	Browsers
F8	Shows column	Browsers
Shift + F10	Displays menu	Browsers
Ctrl + S	Saves record	Viewers
Ctrl + R	Undoes record	Viewers
Ctrl + B	Invokes create and modification details	Viewers
Ctrl + P	Goes to previous record	Browsers and viewers with navigation panels
Ctrl + N	Goes to next record	Browsers and viewers with navigation panels
Ctrl + Home	Goes to first record	Browsers and viewers with navigation panels
Ctrl + End	Goes to last record	Browsers and viewers with navigation panels
Ctrl + Left cursor	Goes to previous page	Wizards
Ctrl + Right cursor	Goes to next page	Wizards

Typographic

This document uses the text or typographic conventions listed in the following table.

If you see:	It means:
monospaced text	A command or file name.
<i>italicized monospaced text</i>	A variable name for a value you enter as part of an operating system command; for example, <i>YourCDROMDir</i> .
indented command line	A long command that you enter as one line, although it appears in the text as two lines.
Note	Alerts the reader to exceptions or special conditions.

If you see:	It means:
Important	Alerts the reader to critical information.
Warning	Used in situations where you can overwrite or corrupt data, unless you follow the instructions.

The background of the page is a grayscale image of several interlocking gears. The gears are of different sizes and are arranged in a way that they appear to be meshing together. The lighting is soft, creating a sense of depth and texture. The overall tone is professional and technical.

Chapter 1

Overview

This chapter provides an overview of QAD Customer Relationship Management (QAD CRM) and its enterprise-wide deployment. It discusses the following topics:

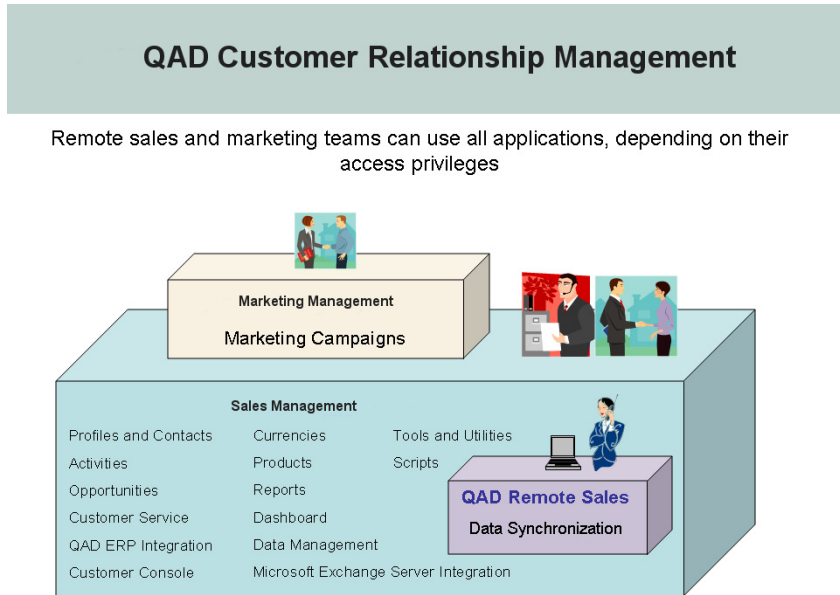
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Overview

QAD CRM is a comprehensive business-generating system that consists of several applications:

- QAD Sales Force Automation (QAD SFA). This is the core of the system that is designed to help you streamline sales efforts by managing your contacts, activities, business opportunities, product details, and so on.
- QAD Remote Sales. This is an optional stand-alone version of QAD CRM that lets remote sales personnel synchronize their data with the host database.
- QAD Marketing Automation. This optional application provides comprehensive campaign management features designed to streamline marketing efforts. All modules available in QAD Sales Force Automation are included in QAD Marketing Automation.

Fig. 1.1
QAD CRM
Functional Areas



QAD CRM applications can communicate with each other to share information. For example, sales and marketing departments can share details of customers, prospects, partners, and suppliers through the application they use. The system ensures organizational and departmental data security by selectively restricting user access to data.

The system can integrate and synchronize data with QAD 2008.1 Standard Edition (SE), as well as Microsoft Exchange Server 2003.

When remote users synchronize data in their personal database with the host databases, they indirectly synchronize data with the integrated system.

You can install QAD CRM across the enterprise network as a client/server application. QAD Remote Sales is installed on remote computers as a stand-alone application.

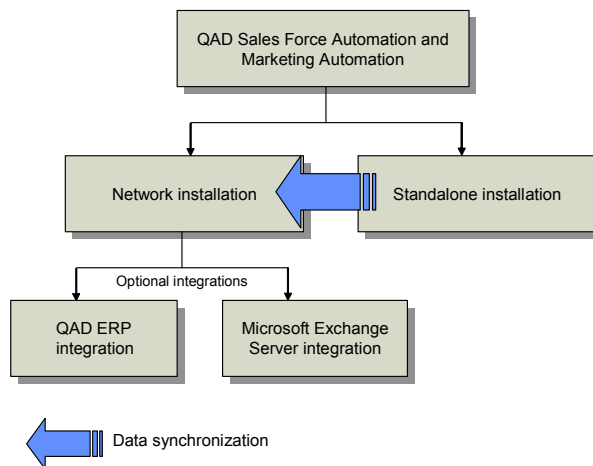


Fig. 1.2
Installation
Overview

The system also integrates with other third-party applications—Microsoft Word 2003, Microsoft Excel 2003, Crystal Report XI, and Phone Dialer—to support various functions. For example, you can create business letters using Microsoft Word templates registered in the system.

The architecture, features, and functionality of the system meet enterprise requirements of reliability, scalability, flexibility, and maintainability.

Installation

You can install QAD CRM across the enterprise network as a client/server application. QAD Remote Sales is installed on remote computers as a stand-alone application.

To install the system you should be familiar with the following technologies and products:

- Progress
- TCP/IP networking
- QAD CRM
- QAD Enterprise Applications 2008.1 SE
- Microsoft Exchange Server 2003
- UNIX or Linux
- Text editors

Installing QAD CRM on a Network

- 1 Ensure that your hardware and software infrastructure meets the minimum requirement criteria for installation.
- 2 Plan the network installation.
- 3 Ensure that all required Progress components are installed.
- 4 Set up the system on the file and database servers:
 - a Install and configure program components on the file server.
 - b Set up the database server.
 - c Configure the servers to communicate with clients.
 - d Set up the system installation environment to integrate with the QAD ERP application.
 - e Prepare the AppServer environment to support Microsoft Exchange Server 2003 integration and e-mail data synchronization.

- 5 Set up the clients:
 - a Edit various files on the server to specify the correct information based on the network architecture.
 - b Install Progress on client computers.
 - c Install the clients.
- 6 Start the database and file servers. Then start the client sessions that connect to them.

Installing QAD Remote Sales

- 1 From QAD CRM:
 - a Create remote or regional nodes.
 - b Enable data synchronization.
 - c Create host database subset.
- 2 On the remote computer(s):
 - a Ensure that the hardware and software configuration of remote computers meet the minimum requirement criteria for installation.
 - b Install Progress Personal Database.
 - c Install QAD Remote Sales.
 - d Load the host node subset onto the Progress Personal Database.
 - e Enable data synchronization.

Configuration

You must configure QAD CRM according to the requirements of your company. Configuration tasks can be categorized as mandatory or functional.

- Mandatory tasks include setting up the system for enterprise-wide use by configuring business unit details, administrator profile, base currency, and so on. When you start the system after installation, you can configure it with mandatory information by using the Configuration Wizard.
- Functional tasks include configuring user profiles, teams, menus, reports, templates, system settings, and so on by using the system setup modules.

Integration

You can integrate the system with your QAD ERP application and Microsoft Exchange Server 2003 to enhance its scope.

Integration with the QAD ERP Application

Various modules of your QAD ERP application can be integrated with QAD CRM through CIM, database, and session triggers to provide efficient and fast online integration.

For integration purposes the databases must run in multi-user mode and must always be available. The file server that holds QAD ERP application programs must include certain QAD CRM programs. Similarly, the file server that holds QAD CRM programs must contain certain QAD ERP application programs.

After configuring the applications you can enable and configure the integration as required. You can then perform the initial data transfer between the integrated systems.

Integration with Microsoft Exchange Server

By integrating the system with Microsoft Exchange Server 2003 you can:

- Send e-mail messages from the system using the Microsoft Outlook client.
- Maintain references to e-mail messages stored in Microsoft Outlook in the system.
- Synchronize activity and contact details between the system and Microsoft Exchange Server 2003.

- Synchronize data sent using e-mail messages between the stand-alone version and network version of the system.

For the integration you must install QAD AdminService, which communicates with Microsoft Exchange Server 2003 and its components for the integration. You must also register various Dynamic Link Libraries (DLLs) and custom forms with Microsoft Exchange Server 2003.

Installation

This chapter describes how to install QAD Customer Relationship Management (QAD CRM). It discusses the following topics:

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Planning an Installation

This section describes topics you should understand before installing QAD CRM.

If you have experience installing QAD CRM from previous versions, numerous changes have occurred to the installation process.

A QAD CRM installation can be one of three types:

- A new installation.
- A Service Pack installation.
- An installation to support a conversion from an earlier QAD CRM version to the current release (upgrade).

This section only describes how to perform a new installation. To perform a new install, you must plan for the following:

- 1 An installation addressing:
 - Test and production databases
 - QAD ERP application integration (optional)
 - Exchange Server integration (optional)
 - QAD Remote Sales (optional)
- 2 QAD CRM database configuration, including any custom and other side databases.
- 3 The resulting network, disk, and client layouts.

Security Plan

A successful QAD CRM installation requires a complete security plan. During installation, full permissions are required for system and application tools that are used to load, edit or delete data. In addition, to install the system on a network, you require administrator privileges as installation programs create registry entries and may update some system files that require administrator rights.

In addition, to integrate Exchange Server, you need to create one user, `qadsfama`, in Active directories with full administrative access.

A security plan typically consists of:

- 1 Operating-system-level security for tools such as:
 - Progress Editor
 - Progress Data Administrator
 - Progress Application Compiler
- 2 Operating-system login security.
- 3 Operating-system permissions and ownership set appropriately for:
 - Database files
 - Log files
 - Application source and compiled source files
 - Application startup and shutdown scripts
 - Registry

Deployment

You can install QAD CRM on UNIX/Linux and Windows servers. QAD CRM has three components:

- Database server
- File server
- QAD CRM clients

Database Server

The database server consists of the QAD CRM databases. You build these databases as part of the installation. You first create empty databases, then use the empty databases as a template to build test, production, training, development and other databases. Clients connect to these databases directly or through a file server. QAD CRM stores information in the `bisgen`, `bisgmenu`, and `dataexch` databases.

File Server

The file server is the location of the QAD CRM encrypted code, compiled specifically for this machine. The resulting .x code is run by the connected clients.

QAD CRM Clients

QAD CRM has two types of clients:

- **Connected client.** A client setup is required for connecting to the database server and Windows file server. Client setup copies system files to the client PC and creates necessary icons. The resulting client runs the source code on the file server and accesses the databases on the database server.
- **QAD Remote Sales.** This is an optional stand-alone version of QAD CRM that lets remote sales personnel use the system in an offline mode and synchronize data with the host database. A client setup is required to install QAD Remote Sales and perform data synchronization.

QAD ERP Application Integration

You can integrate various modules of the QAD ERP application with QAD CRM through database and session triggers (except Sales Order, which uses CIM through Progress AppServer). Integration provides efficient and fast on-line integration.

For the integration, the QAD ERP application and QAD CRM databases must run in multi-user mode and always be available. The file server that holds QAD ERP application programs must include certain QAD CRM programs. Similarly, the file server that holds QAD CRM programs must contain certain QAD ERP application programs.

QAD recommends that you deploy:

- QAD CRM and QAD ERP application databases on the same database server.
- The Progress AppServer on the database server.

Exchange Server Integration

You can integrate various modules of Microsoft Exchange Server 2003 (e-mails, appointments, and tasks) with QAD CRM. For integration you must install QAD AdminService. The QAD AdminService is a Windows service that communicates with Microsoft Exchange Server 2003 and QAD CRM using Progress AppServer. QAD CRM runs QAD AdminService on the file server machine.

QAD recommends deployment of Progress AppServer on the database server.

Network, Disk, and Client Layout

The databases and program files can reside on the same Windows server. Using the same server enhances system performance. However, if there are many clients, you should use separate servers for resource sharing.

The servers must be easily accessible by clients running on workstations across the network. They must have sufficient free hard disk space to accommodate operations performed by system users.

At a machine level, QAD recommends deployment of QAD CRM databases on a database server and software on a file server separate from the database server.

System Requirements

This section describes hardware and software requirements for deploying QAD CRM.

General Requirements

The system administrator must be an experienced Progress database administrator with experience managing Progress client processes. Before installing QAD CRM, Progress must be installed following the instructions in the Progress installation guide. The Progress install for each platform may include UNIX kernel changes and patches.

Database Server

The database server contains QAD CRM and Progress server software, as well as your production data. You should estimate the final size of your production database and the demands placed on different components of the database before starting an installation so that you can lay out your disks appropriately.

Table 2.1
Hardware
Requirements for
Database Server

Hardware Component	Minimum Requirement
Processor	Pentium 4 2.80 GHz, dual processor or above
RAM	2 GB For better performance, use 4 GB RAM or more.
Hard disk	8 GB The hard disk requirement may be more, depending on the number of: <ul style="list-style-type: none"> • Environments you want to create. The environments are compilation, test, and production. • Users that will connect to the server.
Others	SVGA color monitor High-speed 100MB Ethernet card CD-ROM drive

Table 2.2
Software
Requirements for
Database Server

Software Component	License Type	Version
Progress	Enterprise Database Server	10.1 BSP2, 10.1 BSP3, 10.1 CSP1
Progress	AppServer Enterprise	10.1 BSP2, 10.1 BSP3, 10.1 CSP1
Operating System		UNIX/Linux/Windows 2000/Windows 2003

File Server

The file server requirements cover shared client requirements.

Hardware Component	Minimum Requirement
Processor	Pentium 4 2.80 GHz, dual processor or above
RAM	2 GB For better performance, use 4 GB RAM or more.
Hard disk	8 GB The hard disk requirement may be more, depending on the number of: <ul style="list-style-type: none"> • Environments you want to create. The environments are compilation, test, and production. • Users that will connect to the server.
Others	SVGA color monitor High-speed 100MB Ethernet card CD-ROM drive

Table 2.3
Hardware Requirements for File Server

Software Component	License Type	Version
Progress	Client networking	10.1 BSP2, 10.1 BSP3, 10.1 CSP1
Progress	Query Result	10.1 BSP2, 10.1 BSP3, 10.1 CSP1
Operating System		Windows 2000/Windows 2003

Table 2.4
Software Requirements for File Server

QAD CRM Connected Clients

The requirements for connected client PCs assume that all shared files are on a file server and all databases on a database server.

Hardware Component	Minimum Requirement
Processor	Pentium 4 3.00 GHz processor
RAM	1 GB For better performance, use 1 GB RAM or more.

Table 2.5
Hardware Requirements for Client

Hardware Component	Minimum Requirement
Hard disk	2 GB
Others	SVGA color monitor Network card Ethernet connection running TCP/IP protocol

Table 2.6
Software Requirements for Client

Software Component	License Type	Version
Operating System		Windows 2003/2000/XP

QAD ERP Application Integration

Table 2.7
Requirements for QAD ERP Application Integration

Technology Component	Server	Client
QAD ERP application	QAD 2007.1, QAD 2008 SE, QAD 2008.1 SE	QAD 2007.1, QAD 2008 SE, QAD 2008.1 SE

Microsoft Exchange Integration

Table 2.8
Requirements for Microsoft Exchange Server 2003 Integration

Technology Component	Server	Client
Microsoft	Microsoft Exchange Server 2003	Microsoft Outlook 2003, Microsoft Outlook 2007

QAD Remote Sales

Table 2.9
Hardware Requirements for QAD Remote Sales

Hardware Component	Minimum Requirement
Processor	Pentium 4 3.00 GHz processor
RAM	1 GB For better performance, use 1 GB RAM or more.
Hard disk	4 GB
Others	SVGA color monitor Network card Ethernet connection running TCP/IP protocol CD-ROM drive

Technology Component	License Type	Version
Progress	Personal database	10.1 BSP2, 10.1 BSP3, 10.1 CSP1
Operating System		Windows XP

Users can synchronize data in QAD Remote Sales with data in the host database using Progress AppServer. VPN access to office network is required.

Table 2.10
Software
Requirements for
QAD Remote Sales

Method	Technology	Server	QAD Remote Sales Client
Progress AppServer	Progress	QAD CRM	VPN Client

Table 2.11
Progress AppServer
Synchronization
Requirements

Network

Set up your network to support the Progress specifications. The minimum requirement is a 10 Megabit (Mb) Ethernet or faster network. For better maintenance and performance, QAD recommends the following:

- Install Progress Database and AppServer components on the database server.
- Install all Progress client components (Client Networking and Query result) on the file server.
- If you are integrating or planning to integrate with an QAD ERP application, use the same database server and Progress database and AppServer components used by the QAD ERP application.
- 100 Megabit (Mb) Ethernet or faster network.

Installing Progress Components

The system requires various Progress components for deployment. If these components are not already installed, you must install them before system deployment.

Progress Components on the Database Server

The following Progress components must be on the database server:

- Progress Enterprise database server
- Progress AppServer

QAD recommends deployment of Progress AppServer on the database server.

Progress Components on the File Server

The following Progress components must be on the file server:

- Progress Client Networking and Query Result. These licenses are shared by clients from a central location in the network. They can also be installed on individual workstations. Though installation on workstations is not recommended, it may be considered where the network traffic speed is slow. For increased efficiency, QAD recommends that you install the client networking and Query Result components in the QAD CRM file server.
- Progress Query/Result license. This license is required for the GDI module only (importing data from external sources into the system database).

Note For details on installing Progress components, refer to the Progress Software installation guides.

Setting Up the File Server

After planning the deployment and installing all Progress components, you can install the system from the installation CD. You can also download QAD CRM from QAD web site.

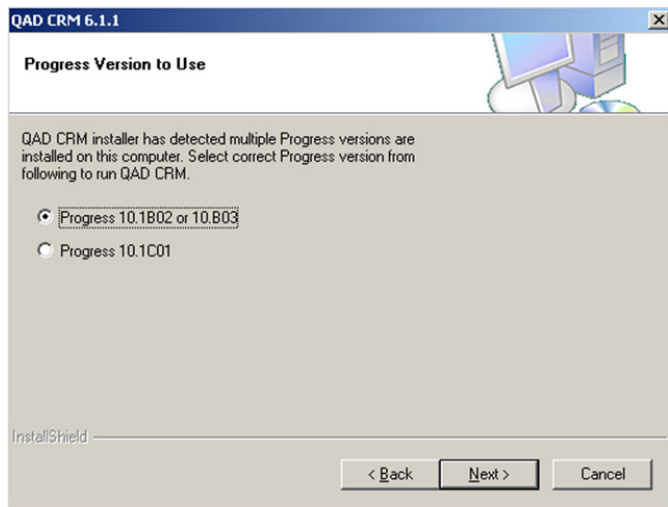
The first step is to set up the file server. The file server:

- Contains all program files
- Manages file sharing
- Manages system security
- Coordinates communication between workstations

Installing QAD CRM Program Files

Use the following steps to install QAD CRM components on the file server:

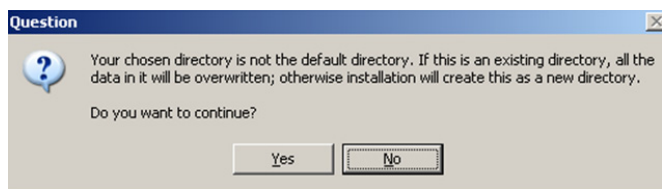
- 1 Insert the installation CD into the CD drive and run the setup program.
- 2 On the QAD CRM Setup Wizard Welcome screen, click Next.
If QAD CRM 6.1 is found on the system, a warning message asks you whether you want to continue with the installation. Click Yes to proceed or No to abort the setup.
Note QAD recommends that you uninstall any previous versions of QAD CRM prior to installing the latest release. However, this warning message only appears when CRM 6.1 is installed on your computer.
- 3 Accept the license agreement and then click Next.
- 4 Setup checks for supported versions of Progress on the computer.
 - If no compatible Progress version (10.1B02, 10.B03, or 10.1C01) is found, Setup displays an error message and aborts the installation.
 - If both Progress 10.1B02/03 and Progress 10.1C01 are installed on the computer, Setup displays the following dialog box.



Select the Progress version you want to use and click Next.

Note Make sure you choose the correct Progress version since Setup will look for the corresponding Progress version directory to copy Progress ADM2 files to during the installation.

- 5 Setup checks for Microsoft .NET Framework 1.1 on the system.
 - If Microsoft .NET Framework 1.1 is already installed, skip to the next step.
 - If Microsoft .NET Framework 1.1 is not found, Setup prompts you to install the component. Click Yes and run the Microsoft .NET Framework 1.1 Setup Wizard to install the component.
- 6 The Destination Location screen appears. Accept the default installation directory and click Next. If you specify another directory other than the default location, you will see the following message:



Note If QAD CRM 6.1 is installed on the computer, the installation directory defaults to `c:\qadcrm611`; otherwise, it defaults to `c:\qadcrm61`. QAD recommends you use the default destination directory.

- 7 In the Program Folder Name screen, specify the program folder name for QAD CRM and click Next.
- 8 In the QAD CRM Setup Confirmation screen, review the selected setup options. To change the options, click Back; click Install to start the installation process.
- 9 Setup may prompt you to copy some files to the Progress ADM2 directory and overwrite existing Progress files. Click Yes to continue. If you click No, a messages warns you that QAD CRM program files may not be successfully compiled later.

- 10 If the Crystal Distribution package is not installed on the computer, the Crystal Distribution Setup Wizard screen appears. Follow the on-screen instructions to complete the installation of this component.
 - a On the Crystal Distribution Setup Wizard Welcome screen, click Next.
 - b On the Select Installation Folder screen, click Next.
 - c On the Confirm Installation screen, click Next.
 - d When installation is complete, click OK.
- 11 If QAD AdminService is not installed, the AdminService Setup Wizard screen appears. Follow the on-screen instructions to complete the installation of this component.
 - a On the QAD AdminService Setup Wizard Welcome screen, click Next.
 - b On the Select Installation Folder screen, click Next.
 - c On the Confirm Installation screen, click Next.
 - d Select English (United States) from the language list and then click OK. The Installation Log screen appears.
 - e Select the I would like to view the Installation Log file check box and then click Finish. The log file is opened in Microsoft Windows Notepad.
 - f Check the log file for errors. Errors begin with two asterisks (**) in the log file. Contact QAD Support if errors are found.
- 12 When QAD CRM installation is complete, Setup creates the following QAD CRM shortcut icons in the QAD CRM program folder.
 - QAD CRM Application Compiler: Compiles encrypted system programs.
 - QAD CRM Help: Launches QAD CRM online help.
 - QAD CRM Demo: Launches the QAD CRM demo environment. To log in to the demo environment, use the username demo and leave the password blank.

- QAD CRM Release Notes: Opens the CRM release notes.
- QAD CRM Upgrade Utility: Upgrades CRM to the most current build.

The installation process creates the following environments:

- `QADCRMInstallDir\compile`: the compilation environment for storing encrypted program files.
- `QADCRMInstallDir\test`: the testing environment for testing QAD CRM.
- `QADCRMInstallDir\prod`: the production environment for storing compiled program files used for enterprise-wide deployment.

Note It is useful to understand how files are organized in the installation directory for administration tasks, such as the system to integrate with the QAD ERP application.

Testing the System

To test the installation on the file server:

- 1 Choose Start|All Programs|QAD CRM 6.1.1|QAD CRM Demo.
- 2 In the User ID field, type `demo`. Leave the Password field blank.
- 3 Test the system functionality.

If you encounter any errors, contact QAD Global Support Services.

Compiling Encrypted Files

Note If you are using Progress 10.1 BSP3, see “Setting Up the Database Server” on page 31.

A full compile of the server code is required after installation. You are not required to compile if you are using Progress 10.1 BSP3. Compiled programs (`.r` code) are shipped with the product. Setup copies the files to the installation folder as part of installation.

Compiling a source file creates an object file with the same name and a `.r` extension.

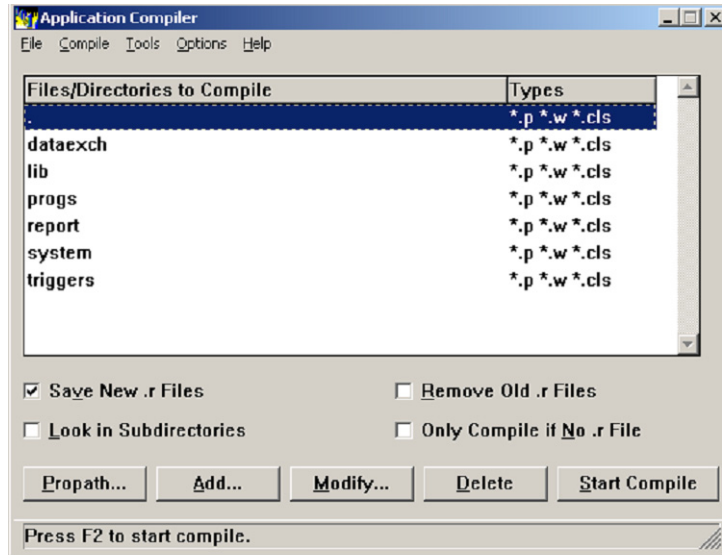
Depending on your system, the Application Compiler can take as much as two hours. You must compile encrypted files in the following directories under QAD CRM installation directory:

- `compile\dataexch`
- `compile\lib`
- `compile\progs`
- `compile\report`
- `compile\triggers`
- `compile\system`

To compile encrypted program files:

- 1 If Progress OE Studio/ProVision Plus license is installed instead of Progress Client Networking, do the following:
 - a Right-click the Application Compiler shortcut icon and choose Properties.
 - b Click the Shortcut tab.
 - c In the Target field, remove `-rx` and click OK.
- 2 Choose Start|All Programs|QAD CRM 6.1.1|QAD CRM Application Compiler. The Application Compiler appears.

Fig. 2.1
Application
Compiler



- 3 If the following directories do not appear, add them by clicking Add:
 - dataexch
 - lib
 - progs
 - report
 - system
 - triggers
- 4 Clear the Look in Subdirectories check box.
- 5 Click Compile to start the compilation.
- 6 The application compiler generates a log file during compilation. Check the log file to ensure that there are no errors. Errors begin with two asterisk characters (**). Contact QAD support in case of any errors.

Note If you are unsure about the location of the log file, check Options\Compiler.
- 7 Once compilation completes, copy the .r programs from the compile directory to the corresponding directories in *QADCRMInstallDir\prod*.

Errors encountered during compilation display in an editor. Note any errors and contact QAD Support.

Setting Up the Database Server

QAD CRM is a multi-database application that requires a minimum of three databases connected concurrently to a single session. Each QAD CRM client session connects to, at minimum, a main database (`bisgen`), an administration database (`bisgmenu`) and a data synchronization database (`dataexch`). If you plan to integrate with a QAD ERP application, you need to connect to other databases.

Working QAD CRM databases are created in two stages. You first create empty databases, then use them as a template to build test, production, training, development and other databases.

To set up databases in a UNIX/Linux server, you must have experience creating databases and loading data definition files in Progress. You must also know how to modify system files such as service and startup scripts for databases.

Before creating the database, determine the following:

- 1 The directory where you want to create the QAD CRM databases, referred to as `QADCRMInstallDirDatabaseServer/db`
- 2 The Progress directory
- 3 The host name of the database server

Set the Progress `DLC` variable correctly and ensure that the `$DLC\bin` directory is included in the `PATH` environment variable. `DLC` is the directory where Progress is installed, and `bin` is a subdirectory of `DLC` where the most often used Progress executables reside.

Setting Up Databases in a UNIX/Linux Server

To create empty databases in a UNIX/Linux server:

- 1 Go to `QADCRMInstallDirDatabaseServer/db`.
- 2 Transfer all the data definition (.df) and structure (.st) files from `QADCRMInstallDir\compile\db\df` to `QADCRMInstallDirDatabaseServer/db` using an FTP or WinSCP program.
- 3 Type the following:

```
prostrct create bisgen bisgen.st -blocksize 8192
prostrct create bisgmenu bisgmenu.st -blocksize 8192
prostrct create dataexch dataexch.st -blocksize 8192
procopy $DLC/empty8 bisgen
procopy $DLC/empty8 bisgmenu
procopy $DLC/empty8 dataexch
```
- 4 Start the Progress data dictionary using the command:

```
_progres -p _admin.p
```
- 5 Connect `bisgen`, `bisgmenu`, and `dataexch` databases and load data definitions into it that define each table, field, and index in the database.
- 6 The database schema (.df file) consists of the sequences, tables, fields and indexes in the database. In this task, you load the schema into the empty `bisgen`, `bisgmenu`, and `dataexch` databases using data definition files `bisgen.df`, `bisgmenu.df` and `dataexch.df`. Load the data definition files using the Progress data dictionary tool.
- 7 The resulting empty databases are used to build all your main and support databases such as `bisgenprod`, `bisgentest`, and `bisgentrain`. Create copies of the databases for backup and testing purposes.

Setting Up Databases in a Windows Server

The QAD CRM installation uses or creates several directories. If you use the default directories and they do not exist at the time of installation, they are created automatically. This applies the ownership and appropriate permissions. However if you create or use the other directories outside installation, make sure that permissions are set properly.

Installation creates the following environments:

- `QADCRMInstallDir\compile`: the compilation environment for storing encrypted program files.
- `QADCRMInstallDir\test`: the test environment for testing QAD CRM.
- `QADCRMInstallDir\prod`: the production environment for storing compiled program files used for enterprise-wide deployment.

The above environments have a `db` folder. QAD recommends that you keep the databases on these folders. For example you can keep test databases on the `QADCRMInstallDir\test\db` folder.

Before creating the database, determine the following:

- 1 The directory where you want to create the QAD CRM databases
- 2 The Progress directory
- 3 The host name of the database server

Set the Progress `DLC` variable correctly and ensure that the `%DLC%\bin` directory is included in the `PATH` environment variable. `DLC` is the directory where Progress is installed, and `bin` is a subdirectory of `DLC` where the most often used Progress executables reside.

To add `DLC` and `PATH` to user environment variables:

- 1 From the Desktop, choose Start|Settings|Control Panel.
- 2 Double-click the System icon and select the Advanced tab.
- 3 Click the Environment Variable button.
- 4 Click New under the User variables for `<user name>` listbox. The New User Variable dialog box appears.

- 5 In the Variable name field, type `DLC`.
- 6 In the Variable value field, type the Progress installation path. Then click OK.
- 7 Repeat Step 4 to create a `PATH` environment variable. In the Variable value field, type the following:

```
%DLC%\bin;%PATH%
```

When you've added the `DLC` and `PATH` environment variables, use the DOS command prompt to run all the Progress commands.

To create databases:

- 1 Using Windows Explorer, copy all the database structure (`.st`) and data definition (`.df`) files from
`QADCRMInstallDir\compile\db\df` to
`QADCRMInstallDir\test\db`

- 2 From the Desktop, choose Start|Run. The Run dialog box appears. Type `cmd` in the Open field. Then click OK.

- 3 Change to the `QADCRMInstallDir\test\db` folder.

- 4 Type the following:

```
prostrct create bisgen bisgen.st -blocksize 8192
prostrct create bisgmenu bisgmenu.st -blocksize 8192
prostrct create dataexch dataexch.st -blocksize 8192
procopy %DLC%/empty8 bisgen
procopy %DLC%/empty8 bisgmenu
procopy %DLC%/empty8 dataexch
```

- 5 Start the Progress data dictionary using the command:

```
_progres -p _admin.p
```

- 6 Connect the `bisgen`, `bisgmenu`, and `dataexch` databases and load data definitions that define each table, field, and index in the database.

- 7 The database schema (.df file) consists of the sequences, tables, fields, and indexes in the database. You load the schema into the empty `bisgen`, `bisgmenu`, and `dataexch` databases using the data definition files `bisgen.df`, `bisgmenu.df` and `dataexch.df`. Load the data definition files using Progress data dictionary tool.

The resulting empty databases are used to build all your main and support databases such as `bisgenprod` and `bisgentrain`. Create copies of the databases for backup and testing purposes.

- 8 Copy all three empty databases from `QADCRMInstallDir\test\db\` to `QADCRMInstallDir\prod\db\` using the command:

```
_procopy bisgen QADCRMInstallDir\prod\db\bisgen
_procopy bisgmenu QADCRMInstallDir\prod\db\bisgmenu
_procopy dataexch QADCRMInstallDir\prod\db\dataexch
```

- 9 Create copies of the databases for backup purposes.

Starting Databases in Multi-User Mode

To enable clients to communicate with the databases, you need to start databases in multi-user mode.

- 1 On the database server machine, tailor your services file. All services names, host names, and port numbers must match in the services files of each client and each database server on the network. The location of the UNIX/Linux services file on the server is typically the `/etc` directory. On Windows, it is located in `C:\windows\system32\drivers\etc`.

Note The more users you expect to have, the more numbers you should leave open between port numbers.

- 2 Add the names of your database services to your services file. Add one for each main database and any other databases you plan to connect to. Limit the service name to 16 characters. You can use any unused port numbers.
- 3 The database service names and suggested port numbers are described below. If these port numbers conflict with your existing setup, you must specify appropriate numbers.

Service Name	Port #/Protocol	Comment
bisgentest	2030/tcp	# test bisgen
bisgmenutest	2040/tcp	# test bisgmenu
dataexchtest	2050/tcp	# test dataexch
bisgenprod	2060/tcp	# Production bisgen
bisgmenuprod	2070/tcp	# Production bisgmenu
dataexchprod	2080/tcp	# Production dataexch

- 4 Start the databases in multi-user mode using one of the following:
 - Progress Explorer (Windows only)
 - Batch files

The installation technician is responsible for supplying and customizing the batch files.

If you plan to integrate with a QAD ERP application, QAD recommends that you use QAD ERP application startup and shutdown scripts.

- 5 Make sure that the databases are running properly. In case of errors, check Progress help and database startup parameters.

Configuring the File Server

To enable clients to communicate with the file and database server, you must configure various files in the file server. All services names, host names, and port numbers must match in the services files of each client and each database server on the network.

You do not have to modify the files in the workstations—the QAD Shared network installation program does this. However, you must configure various files on the file server.

Configuring the `services.txt` File

The `services.txt` file in the QAD CRM file server contains a list of database service names and their port number. The QAD CRM Shared network installation program uses this file to update the services file of client computers to start a multi-user session.

You must ensure that the database service names and port numbers in the `services.txt` file match the services file of the database server that you have defined in the start databases in the multi-user mode section.

To update the `services.txt` file:

- 1 Open the following file in an editor:

```
QADCRMInstallDir\test\netsetup\services.txt
```

- 2 Specify the correct service names and their port numbers.

- 3 Save and close the file.

- 4 Open the following file:

```
QADCRMInstallDir\prod\netsetup\services.txt
```

- 5 Repeat Steps 2 and 3.

Configuring the Initialization File

The system uses an initialization file to run QAD CRM from the server.

To configure the initialization file:

- 1 Open the `.ini` file, typically `qadsfamaclient.ini`, in an editor such as Notepad. This file is located here:

```
QADCRMInstallDir\test\netsetup
```

- 2 Ensure that the DLC environment variable is set to NULL:

```
DLC=
```

- 3 Save the file.

- 4 Open the `.ini` file in the following location:

```
QADCRMInstallDir\prod\netsetup
```

- 5 Repeat Steps 2–4.

Mapping Network Drive and Permissions

You typically use the Progress and QAD CRM shared network installation to install Progress and QAD CRM on client computers from a central location on the network. This utility updates client computers with the system files, icons, and registry entries required to launch Progress and QAD CRM.

To launch Progress and QAD CRM shared network installation utilities, you need to map two network drives to all client computers: one for Progress and one for QAD CRM.

For example if you have installed:

- Progress on `C:\progress\d1c101b`, you need to map `C:\progress` to a logical drive. For example `S:\`.
- QAD CRM on `C:\qadsfama`, you need to map `C:\qadsfama` to a logical drive. For example `R:\`.

QAD recommends you map the drive by using the net logon script on the file server.

All QAD CRM users should have write permissions to the following folders:

- `QADCRMInstallDir\test`
- `QADCRMInstallDir\test\document`
- `QADCRMInstallDir\test\document\template`
- `QADCRMInstallDir\test\log`
- `QADCRMInstallDir\test\datain`
- `QADCRMInstallDir\test\datain\save`
- `QADCRMInstallDir\test\dataout\`
- `QADCRMInstallDir\test\dataout\save`
- `QADCRMInstallDir\prod`
- `QADCRMInstallDir\prod\document`
- `QADCRMInstallDir\prod\document\template`
- `QADCRMInstallDir\prod\datain`
- `QADCRMInstallDir\prod\datain\save`
- `QADCRMInstallDir\prod\dataout\`
- `QADCRMInstallDir\prod\dataout\save`

Configuring Parameters

The servers and clients connect using scripts, which you must customize appropriately.

In the startup and shutdown scripts of any network environments, you must assign a name to the broker process using the service name startup parameter `-s`. Remote clients communicate with the broker using the same `-s` value as the startup or database parameter. The syntax is:

```
-S servicename port-number
```

Depending on your network type, you might have to specify additional addressing criteria in the scripts for remote clients.

Note The multi-user Progress database server process coordinates database requests from all clients using a single database. For the UNIX or Windows 2000/2003 database server that shares the Progress memory version, the broker process is the main database server. It manages shared resources and starts the server for remote clients.

The TCP protocol requires remote clients to explicitly address the database server computer. You must use the host name startup parameter `-H` to specify the host address. The host address is the name assigned to the database server machine in the TCP/IP host file. The syntax is:

```
-H host-name
```

You must also ensure that the `-s` and `-H` values are correctly defined in the parameter file of QAD CRM. This file is used to connect clients to the database server.

To configure the parameter file:

- 1 For test databases, open the following file in an editor:

```
QADCRMInstallDir\test\netsetup\qadsfamatest.pf
```

- 2 Ensure that the file has correct entries. You must appropriately edit the bold text in the following example of the file contents:

```
# qadsfamatest.pf
#
# Use this parameter file when you are running QAD SFA and MA in
# test mode.
# Refer to Progress Admin Manual for an explanation of these
# parameters.
#
```

```

-db bisgentest -ld bisgen -H <IP address of database server> -S
<test bisgen service name> -N TCP -trig triggers
-db bisgmenutest -ld bisgmenu -H <IP address of database server>
-S <test bisgmenu service name> -N TCP -trig triggers
-db dataexchtest -ld dataexch -H <IP address of database server>
-S <test dataexch service name> -N TCP -trig triggers
-Bt 10000
-mmax 65534
-L 50000
-yy 1950
-cpinternal iso8859-1 -cpstream ibm850
-inp 32000
-tok 4096
-T c:\temp
-zn
-tmpbsize 8
-s 128
-noincrwarn
-h 8
-p progs\plog2000.r

```

- 3 Save the file.
- 4 For production databases, modify the `qadsfamaprod.pf` file located in `QADCRMInstallDir\prod\netsetup`.

Integrating the System with a QAD ERP Application

The system uses a switch-based approach to integrate with a QAD ERP application. It lets you specify the QAD ERP application modules you want to integrate with QAD CRM. The following modules can be integrated:

- Product
- Address
- Sales Quote
- Sales Order
- Installed base
- Call
- Contract
- Contract Quote
- Multiple Currency
- Users

QAD CRM uses database and session triggers to connect and update the databases of both systems, eliminating the need for manual intervention when transferring data between the two systems.

For integration, the databases of both systems:

- Must always be available.
- Must run in multi-user mode.
- Can share the same database server.

For integration you must configure the file servers of the QAD CRM and your QAD ERP application.

Prerequisites

Before integrating with the QAD ERP application, verify that you have met the following prerequisites:

- System requirements for QAD ERP application integration. See “System Requirements” on page 19.
- Configured QAD CRM databases to use client/server connections.
- Your QAD ERP application is functioning properly.
- Your network is operating.
- QAD ERP application databases are in multi-user mode.
- You have access to QAD ERP application compiled programs (.r) and the `xrc` folder.

Configuring QAD CRM for Integration

To configure the system file server for integration:

- 1 Check the primary language used in the QAD ERP application, such as US for US-English or DU for Dutch.
- 2 Create a new directory called `mfgsrv` in the `test` and `prod` directories and then create a language folder under `mfgsrv`. For example in the case of US, create `mfgsrv\us`.

The name of the directory must match the primary language of your QAD ERP application.

As an example, us is assumed to be the detected language. In this case, the new directories are:

QADCRMInstallDir\test\mfgsrv\us

QADCRMInstallDir\prod\mfgsrv\us

3 Under the new directory, create the following directories:

- mfgsrv\triggers
- mfgsrv\us\gp
- mfgsrv\us\sq
- mfgsrv\us\fs
- mfgsrv\us\mc
- mfgsrv\us\px
- mfgsrv\us\tx
- mfgsrv\us\lg
- mfgsrv\us\qq

4 Copy the files as described below.

Copy all files from this directory in the installation directory	...to this directory in the test and prod directories of the QAD CRM installation directory
<i>QADERPInstallDir</i>	mfgsrv (copy only .r files)
/triggers	mfgsrv\triggers
/us	mfgsrv\us (copy only the .r files)
/us/fs	mfgsrv\us\fs
/us/gp	mfgsrv\us\gp
/us/lg	mfgsrv\us\lg
/us/mc	mfgsrv\us\mc
/us/px	mfgsrv\us\px
/us/qq	mfgsrv\us\qq
/us/sq	mfgsrv\us\sq
/us/tx	mfgsrv\us\tx

5 Rename the file:

QADCRMInstallDir\compile\system\psys0101.i

For example, you can rename the file to psys0101.i.org.

- 6 Copy `psys0101.i` from `QADCRMInstallDir\compile\integration\eb21` to the following folder:
`QADCRMInstallDir\compile\system`
- 7 Open the system parameter file `.pf` located at:
`QADCRMInstallDir\prod\netsetup`
`QADCRMInstallDir\test\netsetup`
- 8 Modify the parameter file to connect to all QAD ERP application test and prod databases.
For QAD ERP application test databases, modify:
`QADCRMInstallDir\test\netsetup\qadsfamatest.pf`
For QAD ERP application prod databases, modify:
`QADCRMInstallDir\prod\netsetup\qadsfamaprod.pf`
Use the trigger option and specify the trigger location for QAD ERP application databases:
`-trig mfgsrv\triggers`
- 9 Create a folder called `xrc` under `QADCRMInstallDir\compile` and then copy all programs from `QADERPInstallDir/xrc` to:
`QADCRMInstallDir\compile\xrc`
- 10 Modify `QADCRMInstallDir\compile\qadsfamacompile.pf` to connect all the QAD ERP application compilation databases.
- 11 If Progress OE Studio/ProVision Plus license is installed instead of Progress Client Networking, do the following:
 - a Right-click the Application Compiler shortcut icon and choose Properties.
 - b Click the Shortcut tab.
 - c In the Target field, remove `-rx` and click OK.
- 12 Choose Start|All Programs|QAD CRM 6.1.1|QAD CRM Application Compiler and compile all the programs in the following directories:
 - `QADCRMInstallDir\compile\integration\mfgpro`
 - `QADCRMInstallDir\compile\triggers`

- `QADCRMInstallDir\compile\system`
- `QADCRMInstallDir\compile\dataexch`
- `QADCRMInstallDir\compile\progs`
- `QADCRMInstallDir\compile\report`
- `QADCRMInstallDir\compile\xrc\mfdpers.p`

Note View the compiler log file to check for errors.

- 13 Copy the `.r` files from the directories listed in Step 12 to their corresponding directories in the `QADCRMInstallDir\prod` directories.
- 14 Copy `QADCRMInstallDir\compile\xrc\mfdpers.r` to the following folders:
 - `QADCRMInstallDir\test\mfgsrv\us`
 - `QADCRMInstallDir\prod\mfgsrv\us`
- 15 Create the following directories in the QAD ERP application installation environment:
 - `QADERPInstallDir/integration/test`
 - `QADERPInstallDir/integration/prod`
- 16 Copy the `.r` files you copied in the `prod` directory in Step 12—except `mfdpers.r`—to their corresponding directories in this location:
 - `QADERPInstallDir/integration/prod`

Configuring the QAD ERP Application for Integration

To configure the QAD ERP application file server:

- 1 Modify the QAD ERP application parameter file (`.pf`) for connecting to the QAD CRM databases.

The following is an example of how you can modify the `.pf` file.

```
-db testdb -ld qaddb -N TCP -H progsol_sni -S mfgdemo-srv -trig
triggers
-db testcu -ld custom -N TCP -H progsol_sni -S custtest-srv -trig
triggers
-db helptest -ld qadhelp -N TCP -H progsol_sni -S hlpdemo-srv -
trig triggers
-db admintest -ld qadadm -N TCP -H progsol_sni -S admdemo-srv
-db bisgen -N TCP -H progsol_sni -S testbisgen -trig
QADERPInstallDir/integration/prod/triggers
-db bisgmenu -N TCP -H progsol_sni -S testbisgmenu -trig
```

```

QADERPInstallDir/integration/prod/triggers
-db dataexch -N TCP -H progsol_sni -S testdataexch -trig
QADERPInstallDir/integration/prod/triggers
-h 8
-yy 1950

```

In the above example, `progsol_sni` is the name of the QAD CRM database server.

Normally, the QAD ERP application uses the same `.pf` file for telnet, `connmgr`, AppServer broker, and WebSpeed broker. If this is not the case, you must modify all `.pf` files.

- 2 Modify the QAD ERP application configuration settings (`.ini`) file, telnet, `connmgr`, AppServer broker, and WebSpeed broker for the test environment to add the following directory locations in the `PROPATH`:

```

QADERPInstallDir/integration/test
QADERPInstallDir/integration/test/system
QADERPInstallDir/integration/test/dataexch
QADERPInstallDir/integration/test/progs
QADERPInstallDir/integration/test/report
QADERPInstallDir/integration/test/triggers
QADERPInstallDir/integration/test/integration/mfgpro
QADERPInstallDir/integration/prod
QADERPInstallDir/integration/prod/system
QADERPInstallDir/integration/prod/dataexch
QADERPInstallDir/integration/prod/progs
QADERPInstallDir/integration/prod/report
QADERPInstallDir/integration/prod/triggers
QADERPInstallDir/integration/prod/integration/mfgpro

```

- 3 Modify the QAD ERP application configuration settings (`.ini`) file, telnet, `connmgr`, AppServer broker, and WebSpeed broker for the production environment to add the following directory locations in the `PROPATH`:

```

QADERPInstallDir/integration/prod
QADERPInstallDir/integration/prod/system
QADERPInstallDir/integration/prod/dataexch
QADERPInstallDir/integration/prod/progs
QADERPInstallDir/integration/prod/report
QADERPInstallDir/integration/prod/triggers
QADERPInstallDir/integration/prod/integration/mfgpro

```

- 4 Create a printer record for Sales Order Integration in QAD ERP using the following steps:
 - a Run QAD ERP.
 - b Go to Printer Setup Maintenance (36.13.2) and create a printer record with the following details:
 - Output To: sfama.so
 - Destination Type: Default
 - Description: sfama
 - Lines / Page: 66
 - Scroll Output: No
 - Spooler: No

Leave the rest of the fields blank.

Note Skip Steps 5–11 if you are integrating CRM with QAD 2008 SE or later releases.

- 5 Back up the following programs from the *QADERPInstallDir/xrc* directory:

<i>cmw.t</i>	Write trigger for the QAD ERP application <i>cm_mstr</i> table
<i>ptw.t</i>	Write trigger for the QAD ERP application <i>pt_mstr</i> table
<i>adw.t</i>	Write trigger for the QAD ERP application <i>ad_mstr</i> table
<i>mfwb01a.p</i>	Program for the integration

- 6 Transfer the programs in Step 5 from *QADCRMInstallDir\compile\integration\eb21* to *QADERPInstallDir/xrc* using an FTP or WinSCP program.
- 7 Compile the programs you copied in Step 6 using *Mfg/util*.

Note If the programs are customized, contact your QAD ERP application supplier.
- 8 Copy the compiled files *cmw.r*, *ptw.r*, and *adw.r* from *QADERPInstallDir\xrc* to the directory *QADERPInstallDir/triggers*.

- 9 Copy `mfwb01a.r` from `QADERPInstallDir\xrc` to the directory `QADERPInstallDir`.
- 10 Copy the three triggers `cmw.r`, `ptw.r`, and `adw.r` from `QADERPInstallDir\xrc` to the directory `QADCRMInstallDir\prod\mfgsrv\triggers` using an FTP or WinSCP program.
- 11 Modify the script file used by the QAD ERP application Character Client to connect to the `bisgen`, `bisgmenu`, and `dataexch` databases and startup program:

```
exec $DLC/bin/_progres -rq
$MFGDB -ld qaddb -znotrim -trig triggers
-db $ADMDB -ld qadadm
-db $HLPDB -ld qadhlp
-db $QADSAMDB -ld bisgen -trig triggers
-db $EDATADB -ld dataexch -trig triggers
-db $EBMENUDB -ld bisgmenu -trig triggers
-cpstream iso8859-1 -cpinternal iso8859-1 -cpcoll basic
-Bt 350 -c 30 -D 100 -mmax 3000 -nb 200 -s 63
-E -d dmy -yy 1970 -T /ext1/mfgeB/mfgwork -h 8
-p mfbg.p
```

Setting Up the AppServer Environment

QAD AdminService, QAD ERP application, Sales Order Integration, and QAD Remote Sales data synchronization use Progress AppServer. You must prepare the AppServer environment to support these features.

Note If AppServer and your QAD ERP application are installed on the same computer, skip Steps 1–8.

To prepare the AppServer environment:

- 1 Create the following directories on the QAD CRM AppServer machine:
 - QADCRMAuto/test
 - QADCRMAuto/prod
- 2 Create the following subdirectories under `QADCRMAuto/test` and `QADCRMAuto/prod`:
 - system
 - dataexch
 - progs

- report
 - triggers
 - integration\mfgpro
- 3** Copy all programs from the following locations on the file server to the corresponding directories in the QADCRMAuto\prod directory on the AppServer machine:
- QADCRMInstallDir\prod\system
 - QADCRMInstallDir\prod\integration\mfgpro
 - QADCRMInstallDir\prod\dataexch
 - QADCRMInstallDir\prod\progs
 - QADCRMInstallDir\prod\report
 - QADCRMInstallDir\prod\triggers

If the Appserver is installed on UNIX/Linux, use FTP or WinSCP to copy the programs.

- 4** Define AppServer test and production brokers in the ubroker.properties file.
- 5** Create the AppServer broker .pf file to connect to the QAD CRM and databases.
- 6** Modify the PROPATH parameters of the AppServer brokers. Put QAD CRM folders in the PROPATH.

For test AppServer broker, put the following folders in the PROPATH:

```
QADCRMAuto\test\system
QADCRMAuto\test\integration\mfgpro
QADCRMAuto\test\dataexch
QADCRMAuto\test\progs
QADCRMAuto\test\report
QADCRMAuto\test\triggers
QADCRMAuto\prod\system
QADCRMAuto\prod\integration\mfgpro
QADCRMAuto\prod\dataexch
QADCRMAuto\prod\progs
QADCRMAuto\prod\report
QADCRMAuto\prod\triggers
```

For production AppServer broker, put the following folders in the PROPATH:

```
QADCRMAuto\prod\system
QADCRMAuto\prod\integration\mfgpro
QADCRMAuto\prod\dataexch
QADCRMAuto\prod\progs
QADCRMAuto\prod\report
QADCRMAuto\prod\triggers
```

- 7 Start the AppServer broker using the following command:

```
<Progress Installation Directory>/bin/asbman -name
<broker name> -start
```

- 8 To start the AppServer automatically, modify the QAD-supplied startup batch files.

Configuring the QAD ERP Application Environment for Sales Order Integration

QAD CRM uses CIM to create Sales Order in the QAD ERP application. If you plan to use this feature, use the AppServer from the QAD ERP application machine.

You must also perform the following configuration in your test and production environments.

Test Environment

- 1 Do either of the following:

- If the QAD ERP application is installed on a Linux\UNIX system, copy `QADCRMInstallDir\compile\bin\client_cim_linux.sh` to `QADERPInstallDir/script` (where all the QAD ERP application batch files are available).
- If the QAD ERP application is installed on Windows, copy `QADCRMInstallDir\compile\bin\client_cim_win.bat` to `QADERPInstallDir/script` (where all the QAD ERP application batch files are available).

- 2 Open the copied `client_cim_linux.sh/client_cim_win.bat` file in an editor and make sure the `DLC` and `PROPATH` entries have valid values.

For example in case of Linux/Unix, it should look like this:

```
&DLC = /home/progress/dlc101b
&PROPATH =
QADERPInstallDir,QADERPInstallDir/bbi,QADERPInstallDir/integration/test,QADERPInstallDir/integration/test/system,QADERPInstallDir/integration/test/dataexch,QADERPInstallDir/integration/test/progs,QADERPInstallDir/integration/test/report,QADERPInstallDir/integration/test/triggers,QADERPInstallDir/integration/test/integration/mfgpro,QADERPInstallDir/integration/prod,QADERPInstallDir/integration/prod/system,QADERPInstallDir/integration/prod/dataexch,QADERPInstallDir/integration/prod/prog,QADERPInstallDir/integration/prod/report,QADERPInstallDir/integration/prod/triggers,QADERPInstallDir/integration/prod/integration/mfgpro
```

- 3 Modify the paths of the following files in the `client_cim_linux.sh/client_cim_win.bat` file:
 - `Production.pf`. This parameter file should connect the QAD CRM and QAD ERP application `test` databases. You need to create one if you cannot use any existing `.pf` file.
 - `pintord02.r` file located in the `QADERPInstallDir/integration/prod/integration/mfgpro` directory

Production Environment

- 1 Do either of the following:
 - If your QAD ERP application is installed on a Linux\UNIX system, copy `QADCRMInstallDir\compile\bin\client_cim_linux.sh` as `client_cim_prod_linux.sh` to `QADERPInstallDir/script` (where all the QAD ERP application batch files are available).

- If your QAD ERP application is installed on Windows, copy `QADCRMInstallDir\compile\bin\client_cim_win.bat` as `client_cim_prod_win.bat` to `QADERPInstallDir/script` (where all the QAD ERP application batch files are available).

2 Open the copied

`client_cim_prod_linux.sh/client_cim_prod_win.bat` file in an editor and make sure the `DLC` and `PROPATH` entries have valid values.

For example in case of Linux/UNIX, it should look like this:

```
&DLC = /home/progress/dlc101b
&PROPATH =
QADERPInstallDir,QADERPInstallDir/bbi,QADERPInstallDir/integration/prod,QADERPInstallDir/integration/prod/system,QADERPInstallDir/integration/prod/dataexch,QADERPInstallDir/integration/prod/progs,QADERPInstallDir/integration/prod/report,QADERPInstallDir/integration/prod/triggers,QADERPInstallDir/integration/prod/integration/mfgpro
```

3 Modify the paths of the following files in the

`client_cim_prod_linux.sh/client_cim_prod_win.bat` file:

- `Production.pf`. This parameter file should connect the QAD CRM and QAD ERP application `prod` databases. You need to create one if you cannot use any existing `.pf` file.
- `pintord02.r` file located in the `QADERPInstallDir/integration/prod/integration/mfgpro` directory.

Setting Up Clients

Users can access QAD CRM through the client software installed on their computers.

Before setting up clients, configure the system with mandatory information. You should create user profiles, assign users necessary permissions, and set up the database. For details, see Chapter 3, “Post-Installation Configuration,” on page 69.

Prerequisites

Before setting up QAD CRM clients, verify that you have met the following prerequisites:

- System requirements for QAD CRM. See “System Requirements” on page 19.
- Configured QAD CRM databases to use client/server connections.
- QAD ERP application is functioning properly and databases are configured to use client/server connections (if you plan to integrate to QAD CRM).
- Mapped network drives on each client for Progress and QAD CRM components installed on the file server.
- Your network is operating.

Installing and Configuring Progress on Client Computers

You typically use the Progress shared network installation utility to install Progress Client Networking on client computers from a central location on the network. This utility updates client computers with system files, icons, and registry entries that are necessary for launching Progress locally. Each client shares the network copy of Progress.

To install Progress on a client computer:

- 1 Select the logical network drive you mapped for Progress. For example `S:\`.
- 2 Run `S:\ProgressInstallDir\netsetup\setup.exe` where `S:` is the mapped drive.
This starts the Progress shared network installation utility for installing Progress on client computers.
- 3 In the Group Name field, select the default group name or type a different name.
If the group name does not already exist, the installation utility adds it to the Program menu of your computer.
- 4 Choose a working directory. For example, `C:\temp`.
- 5 Click Finish to complete the installation.

To configure the Progress client:

- 1 Open this file in an editor:
`S:\ProgressInstallDir\dlc\bin\progress.ini`
- 2 In the startup section, add this line, if it is not already present:
`UseSourceEditor=no`
- 3 Save and close the file.

Installing Clients

Client computers connect to the QAD CRM database and file servers through an Ethernet connection running the TCP/IP protocol.

You install the client program on a server that is accessible by workstations. Users can access this program and install the client program. This installation is done using the QAD CRM shared network installation utility.

The shared network installation utility updates each client computer with all system files, icons, and registry entries required to launch the system locally. All clients share the network copy of the system.

The client installation program also initiates the installation program of the Crystal Distribution package. The system requires this software to generate various reports using Crystal Reports.

See “Configuring the File Server” on page 36.

The client installation program uses the `services.txt` and `client.pf` files on the file server to configure the clients.

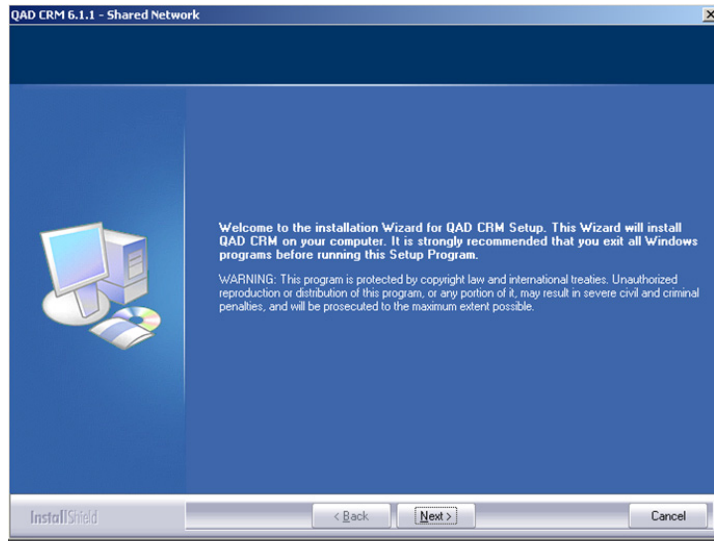
To install the QAD CRM client software on a client computer:

- 1 Select the logical network drive you mapped for QAD CRM. For example `R:\`.
- 2 For the test environment, run:
`R:\test\netsetup\setup.exe`
For the prod environment, run:
`R:\prod\netsetup\setup.exe`

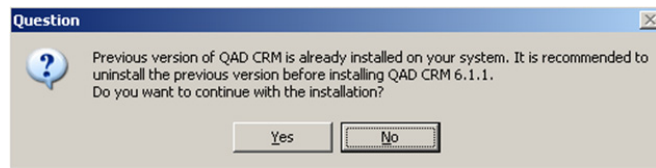
where R: is the mapped drive.

The shared network installation utility starts.

Fig. 2.2
Welcome Screen



- 3 Click Next. If QAD CRM 6.1 is found on the system, Setup displays a warning message. Click Yes to continue with the installation or No to abort the setup.



Note Although it is recommended that you uninstall any previous version of QAD CRM prior to installing the latest release, the warning message only appears when CRM 6.1 is installed on your system.

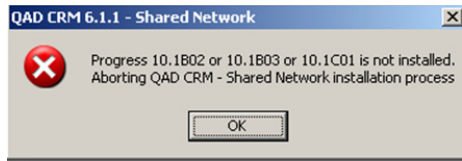
- 4 Setup checks for the following required files in the installation directory in order to proceed. If any one of the following files is not found, an error message appears and the installation is aborted.
 - At least one parameter file (.pf)
 - At least one .ini file

- A `Services.txt` file with services defined in it

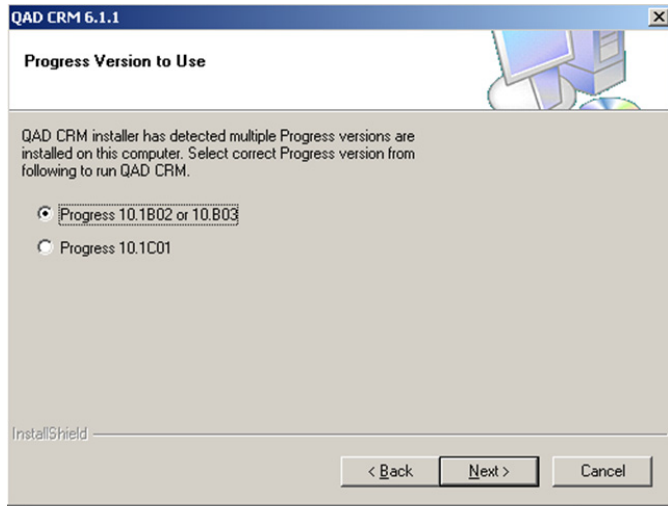
Note Normally, these files are located in the installation directory and you can continue with the installation in most circumstances.

5 Setup checks for the Progress database version installed on the computer.

- If no compatible Progress version (10.1B02, 10.1B03, or 10.1C01) is found, Setup displays an error message and aborts the installation.



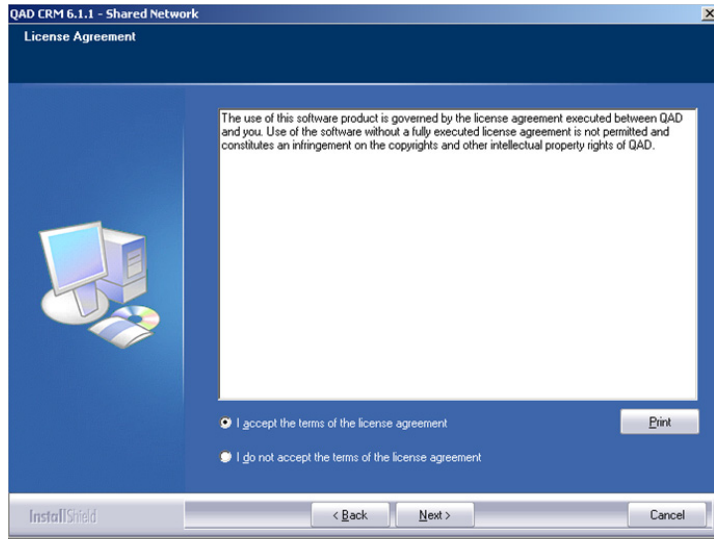
- If both Progress 10.1B02/03 and Progress 10.1C01 are installed on the computer, Setup displays the following dialog box.



Select the Progress version you want to use and click Next.

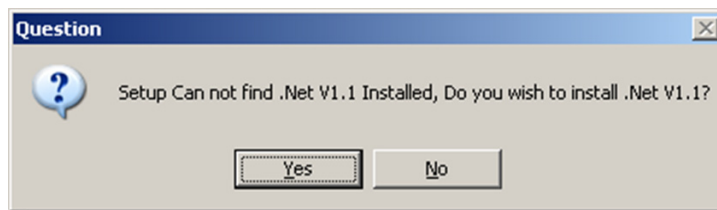
6 Read and accept the license terms and conditions and then click Next.

Fig. 2.3
License Agreement
Screen



- 7 Setup checks if Microsoft .NET 1.1 runtime version is installed. If the runtime version cannot be found, the following message appears. If Setup finds Microsoft .NET 1.1 runtime license, it skips the steps for installing Microsoft .NET 1.1 Framework.

Fig. 2.4
Question



Click Yes. The License Agreement screen appears.

- 8 Read and accept the license terms and conditions and then click Install.

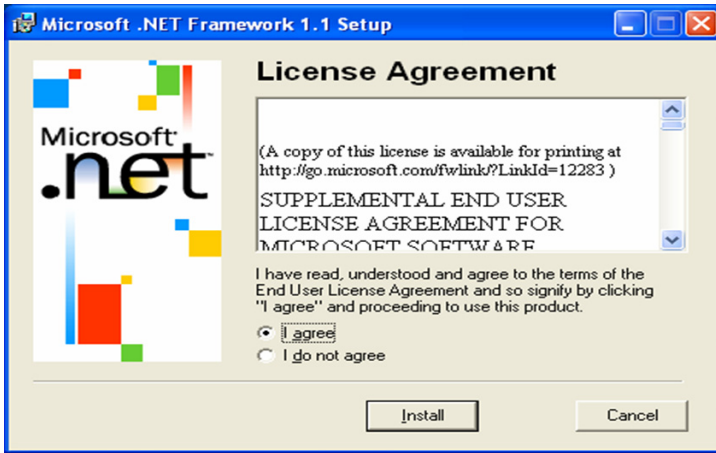


Fig. 2.5
License Agreement

A setup complete message appears when installation has finished.

- 9 Click OK. The Destination Location screen appears.

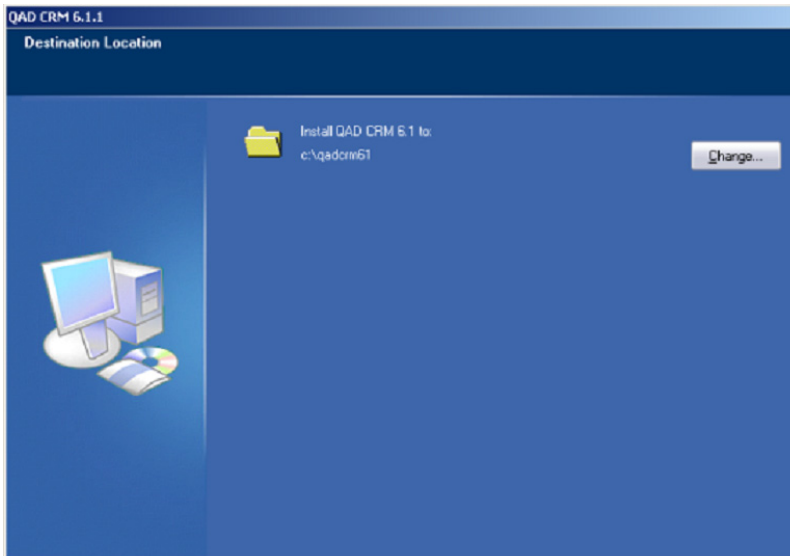
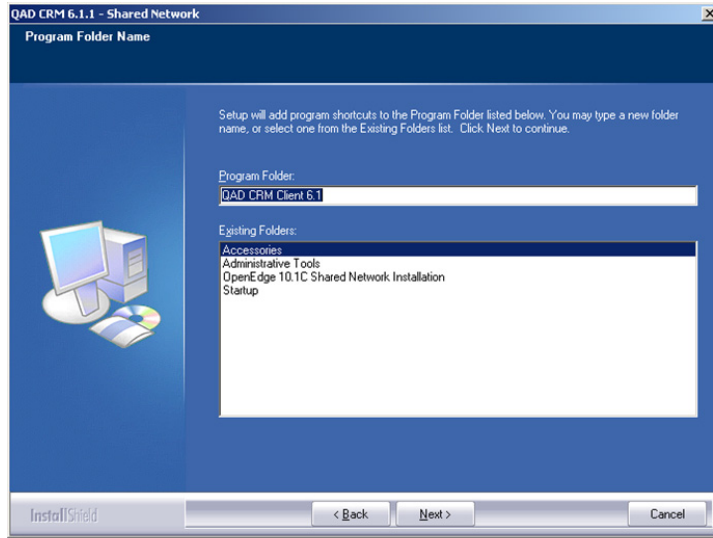


Fig. 2.6
Destination Location

- 10 To change the default installation folder, click Change. Browse and select the folder. Then click OK and then click Next.

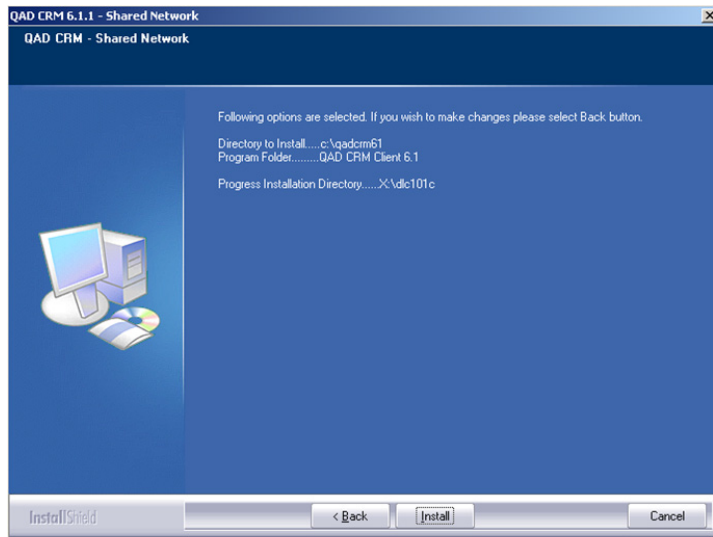
The Program Folder screen appears.

Fig. 2.7
Program Folder
Name



- 11 To change the default program folder for storing shortcuts, specify the desired folder in the Program folder field. Click Next. The Confirmation screen appears.

Fig. 2.8
Confirmation
Screen



- 12 Click Install. Setup starts installing the system components in the designated directory.
- 13 Setup initiates the Crystal Distribution package installation or repair. If this software is already installed, you must select the Repair option. Selecting the Remove option will remove the Crystal Distribution package from the client computer.
- 14 To install the Crystal Distribution package, click Next. The Select Installation Folder screen appears.
- 15 To change the default installation directory, click Browse. Specify the installation directory. Click Next. The Confirm Installation screen appears.

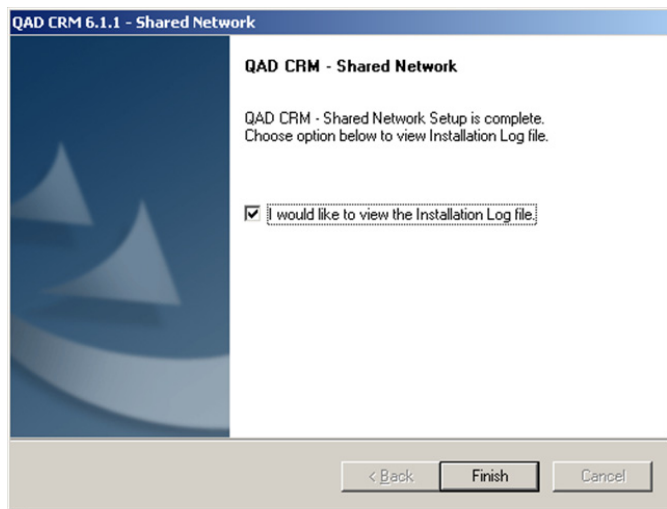


Fig. 2.9
Confirm
Installation Screen

- 16 Click Next to start installation.
- 17 Click Finish.

If you encounter errors during the QAD CRM client installation, contact QAD Support.

Setup creates the following QAD CRM shortcut icons on the Desktop:

- QAD CRM 6.1.1 client
- QAD CRM help

- QAD CRM release notes

Installing QAD Remote Sales

To install QAD Remote Sales on a remote computer:

- 1 Install the Progress and Progress Personal Database. For details, refer to the Progress documentation.
- 2 Install QAD Remote Sales on your remote computers.
- 3 Prepare an appropriate data subset from the host database and load it in QAD Remote Sales.

You must configure the system on the network and QAD Remote Sales on the remote computer to synchronize data.

Installing QAD Remote Sales

To install QAD Remote Sales on a remote computer:

- 1 Install the Progress Personal Database license at:
`C:\Progress\openedge`
- 2 Create a directory on the remote computer to store QAD Remote Sales program files. The assumed directory is:
`C:\QADRemoteSales`
- 3 From the QAD CRM file server, copy the directories and their content from the following location to the new directory you created:
`QADSaleMarkInstallDir\prod`
- 4 Run the following program:
`C:\QADRemoteSales\netsetup\remote\setup.exe`
This program starts the QAD Remote Sales installation.

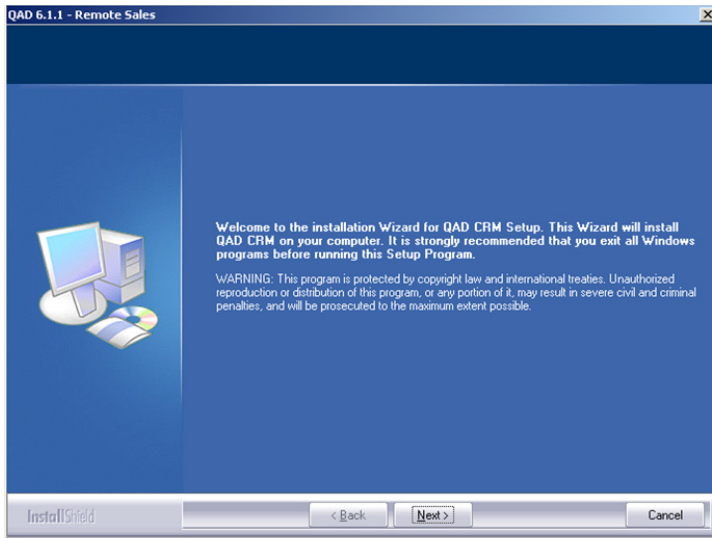
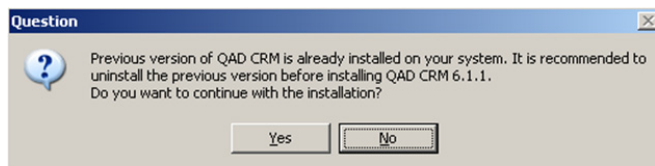


Fig. 2.10
QAD Remote Sales
- Welcome Screen

5 Click Next.

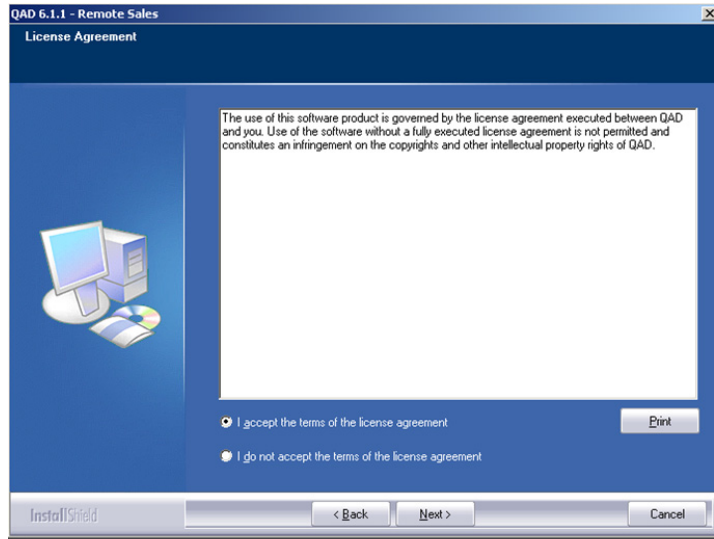
If QAD CRM 6.1 is found on the system, Setup displays a warning message. Click Yes to continue with the installation or No to abort the setup.



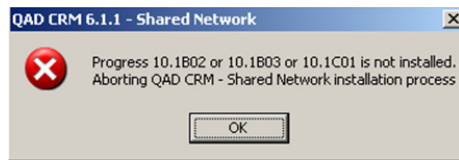
Although it is recommended that you uninstall any previous version of QAD CRM prior to installing the latest release, the warning message only appears when CRM 6.1 is installed on your system.

6 Read and accept the license terms and conditions and then click Next.

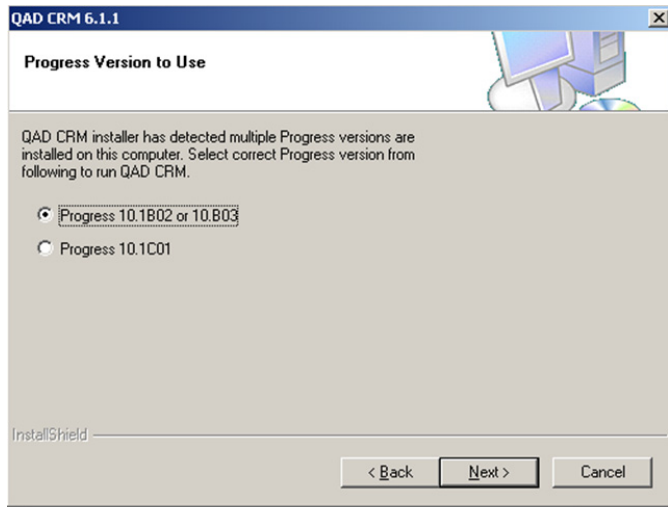
Fig. 2.11
License Agreement
Screen



- 7 Setup checks for the Progress database version installed on the computer.
 - If no compatible Progress version (10.1B02, 101.B03 or 10.1C01) is found, Setup displays an error message and aborts the installation.



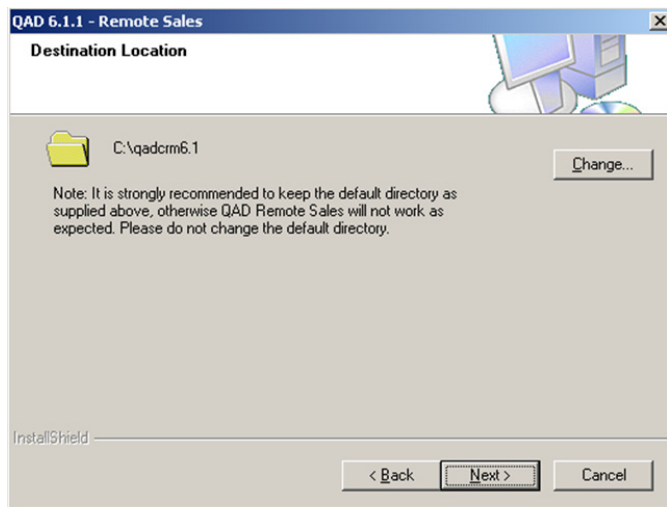
- If both Progress 10.1B02/03 and Progress 10.1C01 are installed on the computer, Setup displays the following dialog box.



Select the Progress version you want to use and click Next.

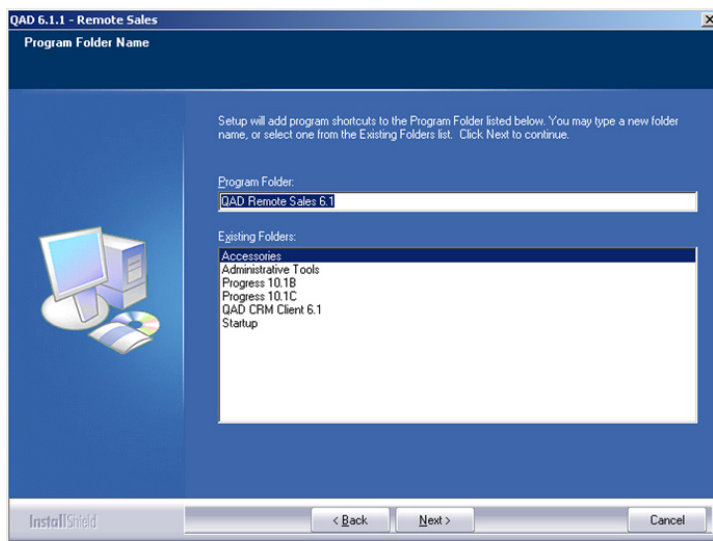
- 8 Setup checks if Microsoft .NET 1.1 runtime version is installed. If the runtime version cannot be found, a message appears.
- 9 Click Yes. The License Agreement screen appears.
- 10 Read the license terms and conditions. To accept all terms, select the I agree option and then click Install. The Microsoft .NET Framework 1.1 setup complete alert appears.
- 11 Click OK. The Destination Location screen appears.

Fig. 2.12
Remote Sales
Destination
Location



- 12 To change the default installation folder, click Change. Browse and select the folder. Then click OK and then click Next. The Program Folder screen appears.

Fig. 2.13
Program Folder



- 13 To change the default program folder for storing shortcuts, specify the folder you want in the Program folder field. Click Next. The Options Selected screen appears.

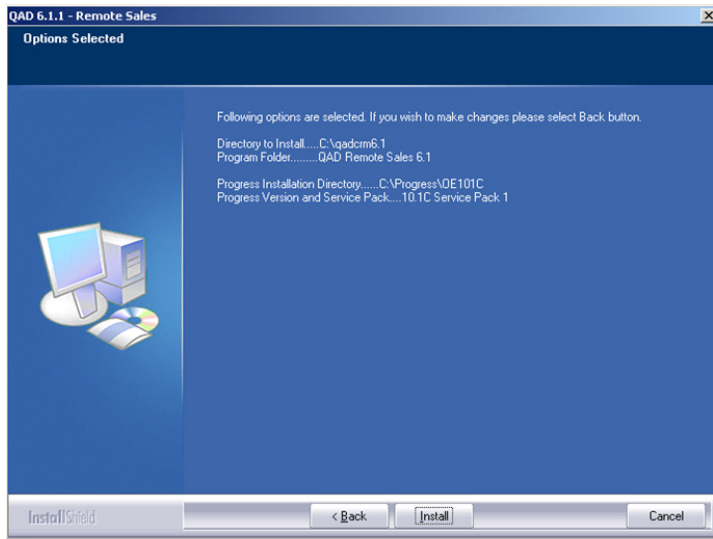


Fig. 2.14
Options Selected

- 14 Click Install. Setup starts installing the system components in the designated directory.
- 15 During install, Setup checks some Progress files. If the files cannot be found, Setup prompts you to copy Progress files. It is recommended to choose Yes to copy the Progress files required.
- 16 The installation program now initiates the Crystal Distribution package installation or repair. If this software is already installed, select the Repair option.
- Note** Choosing the Remove option removes the Crystal Distribution package from the client computer.
- 17 To install the Crystal Distribution package, click Next. The Select Installation Folder screen appears.
- 18 To change the default installation directory, click Browse. Specify the installation directory.

- 19 Click Next. The Confirm Installation screen appears. Click Next to start the installation.
- 20 Click Finish.

The QAD Remote Sales installer creates icons to start the system and access the help system.

After installation you can start QAD Remote Sales with demo data. You should restart the computer for your changes to take effect.

Preparing QAD Remote Sales

Before preparing QAD Remote Sales, you must register the QAD Remote Sales database—called the remote node—with the host system on the network. This is required for data synchronization and data subset creation.

From the database on the network—also called the host node—you must create the data subset file for the remote node. This file is loaded onto the QAD Remote Sales.

To load the host node data subset onto the personal database:

- 1 Extract the appropriate data subset from the host node and save it in the `.res` file format.
- 2 Copy the data subset file of the node in `.res` format from:


```
QADCRMInstallDir\prod\dataout
```

 to this directory on the computer where QAD Remote Sales is installed:


```
QADRemoteSaleInstallDir\datain
```
- 3 Log in as the demo in QAD Remote Sales.
- 4 Choose Main Menu|Remote Sales Data Synchronization|Receive Data to Recreate Current Node. The Node Requiring Re-creation dialog box appears.
- 5 From the Load data from list, choose File.
- 6 In the File Name field, specify the full path and name of the `.res` file.

- 7 Click OK. The system starts loading the data into the personal database.
- 8 Restart the system.

To enable data synchronization:

- 1 Choose Main Menu|Remote Sales Data Synchronization|Node Management Control|Synchronization settings.
- 2 Select the Enable Data Synchronization check box.
- 3 In the No of Days Modified Records must be kept field, type 30.
- 4 Restart QAD Remote Sales.

When needed, synchronize the data with the host node. You must ensure that the data synchronization feature is configured in QAD CRM. QAD Remote Sales users should periodically synchronize data with the host node to keep information current.



Chapter 3

Post-Installation Configuration

This section describes post-installation configuration of QAD Customer Relationship Management (QAD CRM). It discusses the following topics:

Overview **70**

Configuring Mandatory Information **72**

Configuring Function Information **75**

Overview

After installing QAD CRM, you must configure it according to the requirements of your company. Most system features are based on these configurations. For example, users access the system through their user profile and permissions as configured in the system.

You must configure the system before using it in your company's production environment.

Custom settings of the system are categorized as mandatory configurations or function settings.

Mandatory Configuration Tasks

Mandatory configuration tasks provide the minimum information required to operate QAD CRM. These are typically one-time settings and must be completed before the system is used in the production environment. The system provides a Configuration Wizard to set up mandatory information.

Mandatory information includes:

- Details of the headquarters of your business unit
- Administrator profile
- Base currency
- Business year
- Data synchronization
- Look-up data

Function Settings

Function settings are useful for customizing and operating the system. They can be set up at any time during system deployment and include:

- User profiles
- Teams
- System parameters
- Menus

- Programs
- Wizards
- System messages
- User-defined frames
- Export options
- Templates
- Currency and foreign exchange rates
- VAT details
- Product details
- Territory details

You can customize the system with mandatory and function information through the System Setup module.

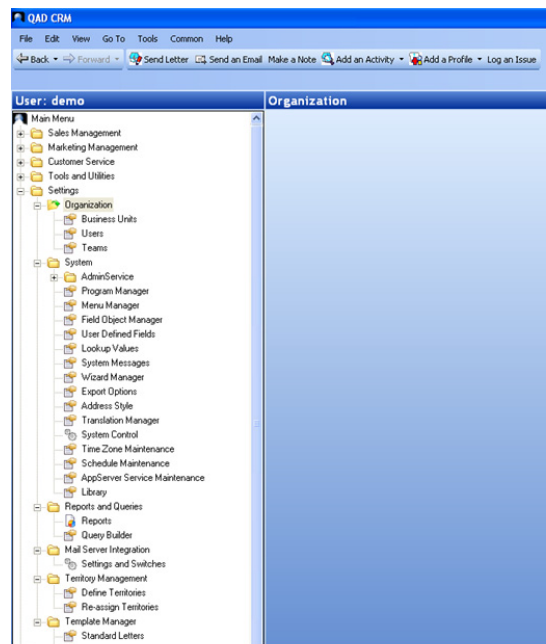


Fig. 3.1
System Setup
Module

To integrate the system with your QAD ERP application, you must appropriately configure QAD CRM for integration. You must then transfer information from your QAD ERP application to the system.

Configuring Mandatory Information

You can configure the system with mandatory information using the Configuration Wizard, which is available when you first start the QAD CRM after installation. The Configuration Wizard leads you step by step through entering the mandatory data.

After configuring the system with mandatory information, log in using the admin user name and password. Then configure the system with function information.

To configure the system using the Configuration Wizard:

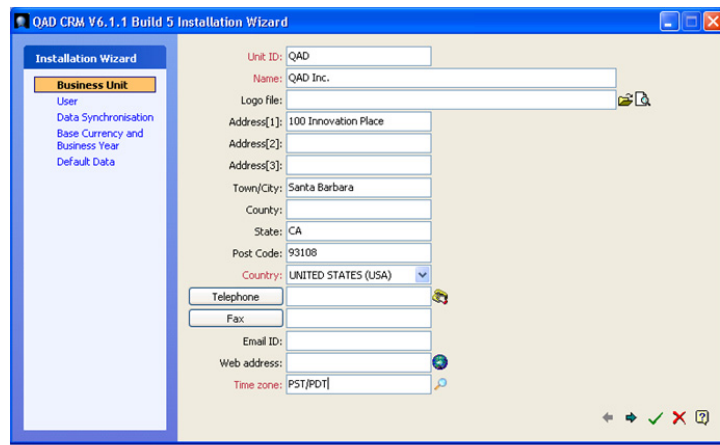
- 1 Start QAD CRM.

Fig. 3.2
Starting the Wizard



- 2 Click Setup. The Configuration Wizard screen appears.

Fig. 3.3
Installation Wizard
- Business Unit



- 3 Enter your business unit details.
- 4 Click Next.
- 5 Enter details for the system administrator user profile.

The screenshot shows the 'Administrator Details' screen in the QAD CRM V6.1.1 Build 5 Installation Wizard. The left sidebar has 'User' selected under the 'Business Unit' section. The main form area is titled 'Details' and contains the following fields:

- User ID: Admin
- Name & Initials: Admin A
- Position: Administrator
- Language: English
- Time zone: [dropdown]
- Phone numbers and Email: Direct, Mobile, Fax, Home (each with a phone icon)
- Business email ID: [text box]
- Private email ID: [text box]
- Address: Address[1], Address[2], Address[3] (each with a house icon)
- Town/City: [text box]
- County: [text box]
- State: [text box]
- Post Code: [text box]
- Country: [dropdown]
- Security: Password, Confirm Password (each with a text box)

Fig. 3.4
Administrator
Details

- 6 Click Next.

The screenshot shows the 'Node Details' screen in the QAD CRM V6.1.1 Build 5 Installation Wizard. The left sidebar has 'Data Synchronisation' selected under the 'Business Unit' section. The main form area is titled 'Node details' and contains the following fields:

- Node ID: QAD
- Description: [text box]
- Time zone: PST/PDT
- Email ID: info@qad.com
- Enable Data Synchronisation
- No. of days modified records to be kept: 0

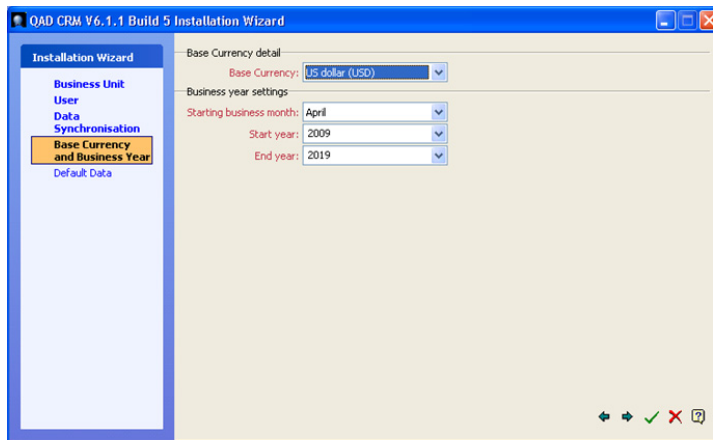
Fig. 3.5
Node Details

- 7 Enter host node details.

Note A node is a database that the system uses. The host node is the main central database to which QAD CRM connects.

8 Click Next.

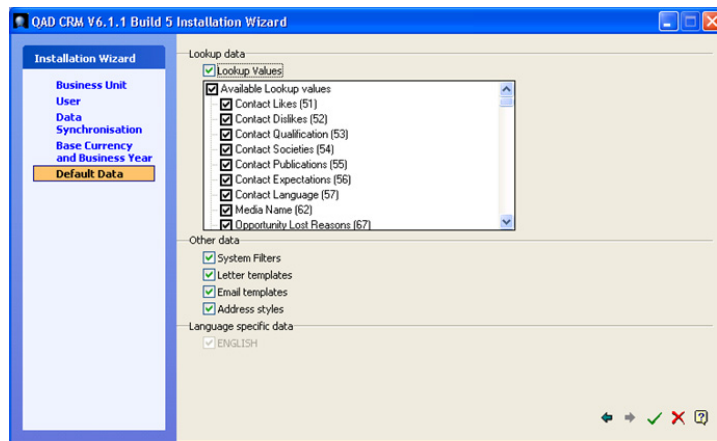
Fig. 3.6
Selecting Base
Currency



9 From the Base Currency drop-down list, select the base currency that your company uses for business.

10 Click Next.

Fig. 3.7
Setting Lookup
Values



11 Select the required options to configure look-up values and select the languages that the system must support.

12 Click Save.

If you leave any mandatory input fields empty, the Configuration Wizard does not let you save the information. In this case use the Back and Next buttons to complete the information, then click Save.

The system is now configured with mandatory information.

- 13 Click OK. The message below appears.

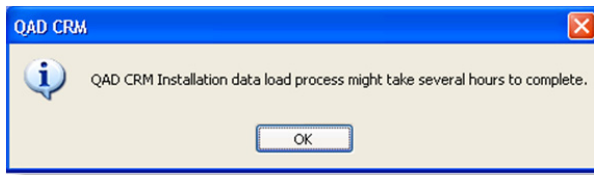


Fig. 3.8
Data Load Process

If necessary, you can modify the configuration from the System Setup module. See *Administration Guide: QAD Customer Relationship Management* for details.

Warning Before modifying any mandatory information, analyze the results. For example, changing the base currency can adversely affect product pricing and exchange rates.

Configuring Function Information

Function information is supplied using various system setup features after the application has been configured with mandatory information. For details, see *Administration Guide: QAD Customer Relationship Management*.

The background of the page is a grayscale image of several interlocking gears. The gears are of different sizes and are arranged in a way that they appear to be meshing together. The lighting is soft, creating a sense of depth and texture. The overall tone is professional and technical.

Chapter 4

Upgrade

This chapter describes conversion tasks required to upgrade your QAD Customer Relationship Management (QAD CRM) version 5.8.2/5.8.3 installation to version 6.1.1 as well as from QAD CRM version 6.1 to 6.1.1.

Upgrading QAD CRM 5.8.2/5.8.3 to QAD CRM 6.1.1 **78**

Upgrading QAD CRM 6.1 to QAD CRM 6.1.1 **83**

Upgrading QAD CRM 5.8.2/5.8.3 to QAD CRM 6.1.1

Use the instructions in this section to convert QAD CRM versions 5.8.2 or 5.8.3 to the 6.1.1 release. This guide covers Windows conversions for Progress databases.

You must perform a full installation of QAD CRM before running the conversion process. You must also perform mandatory setup tasks described in Chapter 3, “Post-Installation Configuration,” on page 69.

The conversion process consists of several steps:

- 1 Connecting to your databases and starting the conversion program
- 2 Mapping country and region values
- 3 Converting table data into version 6.1.1 format

In addition, prior to performing the conversion, ensure that:

- 1 All remote nodes are synchronized and up to date. If you are unsure if your remote nodes are up to date, run the Data Synchronization Report.
- 2 No user is using the version 5.8.2/5.8.3 database during conversion.
- 3 Conversion programs are available in PROPATH.
- 4 The `bisgmsg_v582.d` file is available in the start-in—that is, either test or production—directory.

Follow the instructions in this chapter to complete a successful conversion.

Conversion

- 1 Connect to your version 5.8.2/5.8.3 databases using a Progress 10.1B02/10.1B03 client. Use following logical database names:
 - For `bisgmenu`, use `oldbisgmenu`
 - For `bisgen`, use `oldbisgen`
 - For `dataexch`, use `olddataexch`

Note If you are converting a version 5.8.2 database, ensure that the version 5.8.2 database is started in multi-user mode. If converting a version 5.8.3 database, you can use single-user or multi-user mode.

- 2 Remaining connected to your version 5.8.2 databases, connect to your empty version 6.1.1 databases:
 - bisgmenu
 - bisgen
 - dataexch

Note If your 5.8.2/5.8.3 database is integrated with an ERP application, connect to the ERP application database also.

- 3 Run the `pconvmain.w` program from the Procedure Editor. The Data Conversion Utility window appears.

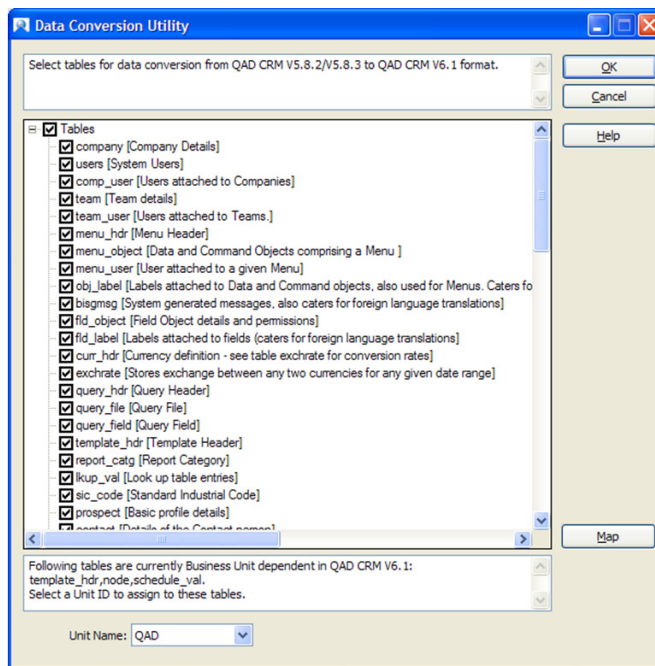


Fig. 4.1
Data Conversion
Utility

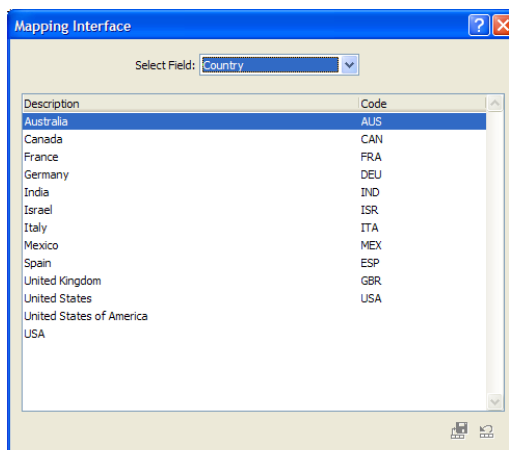
The Data Conversion Utility window lists all the version 5.8.2/5.8.3 database tables you can convert using the conversion routine.

Mapping County and Region

Before converting the database tables, you must use the Mapping Interface box to map the Country and Region fields in the database to the country descriptions. In version 5.8.2/5.8.3, these values are stored as descriptions; in version 6.1.1 they are stored as code.

- 1 On the Data Conversion Utility box, click Map. The Mapping Interface box appears.

Fig. 4.2
Mapping Interface
Box



- 2 From the Select Field dropdown, select Country.
- 3 Double-click the row you want to assign the country code. The dropdown containing the country codes appears.

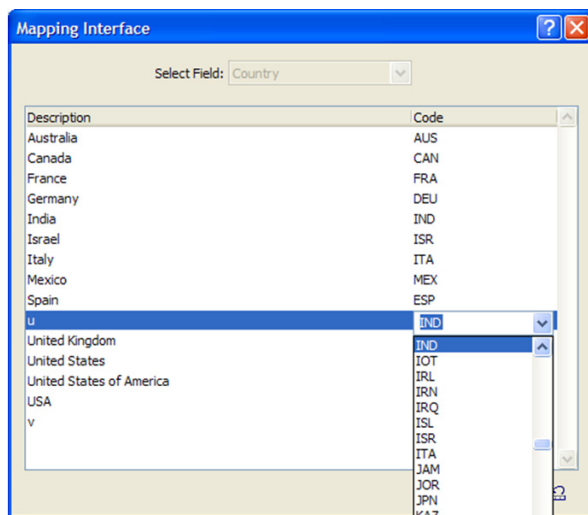


Fig. 4.3
Country Codes
Dropdown

- 4 Select the code you want to map.
- 5 Repeat Steps 3 and 4 for the rows you want to map.
- 6 Click Save.
- 7 Select Region from Select Field dropdown and repeat Steps 3–6.

Converting Table Data

Select the check box for the tables for which you want to convert data, and then click OK.

A conversion log named `conv_qadfama_v582_v6<seq>.log` is generated in the log directory. The value of `<seq>` is incremented each time the conversion routine is run.

You can run the routine as many times as required. If you get conversion errors, review the log file, and then modify and resubmit any affected records for processing. For details, see “Resolving Conversion Errors” on page 82.

Note Tables should be converted in the same order in which they appear in the interface.

Post-Conversion Tasks

After conversion is complete, you may need to perform some or all of the tasks below.

- Correct the time zone value in your business unit records.
- If Microsoft Exchange Server integration is enabled in your version 5.8.2/5.8.3 database, you must enable integration in your version 6.1.1 database. For details on enabling Exchange Server integration, see Chapter 14, “Microsoft Exchange Server Integration,” in *Administration Guide: QAD CRM*.
- If QAD ERP application integration is enabled in your version 5.8.2 database, integration must also be enabled in your version 6.1.1 database. For details on enabling QAD ERP application integration, see Chapter 11, “QAD ERP Integration,” in *Administration Guide: QAD CRM*.
- If QAD ERP application integration is enabled in your version 5.8.2/5.8.3 database, integration must also be enabled in your version 6.1.1 database.
- Rebuild all remote nodes.

Resolving Conversion Errors

Details of the records that are processed or not processed by the conversion routine are listed in the log file with a description of the error. View the log file in a text editor if conversion errors arise.

The log file is created in the log directory in the start-in folder. For example, in a production environment, the start-in folder will be <QADCRM Install>\prod\log; in a test environment this will be <QADCRM Install>\test\log.

```
[contlink]
Number of records expected: 4
HOST-6100-59229-0x0000a9d3: Record does not exist. Record created
20/06/08 11:43:33
Host-6743-67525-0x000000000000ba47: Record does not exist. Record
created 20/06/08 11:43:33
Host-6743-67504-0x000000000000ba46: Record does not exist. Record
created 20/06/08 11:43:33
Host-6744-43981-0x000000000000ba4c: Record already exists. Record
not created 20/06/08 11:43:33
Number of records created: 3
```

After reviewing any errors, modify the record as required in version 5.8.2/5.8.3, and then restart the conversion routine. The routine will scan all records in the version 5.8.2/5.8.3 database and only reload those records not previously processed—no duplicate records will be created in the target database.

The log file display various kinds of messages. For example:

Message	Meaning
Record does not exist. Record created.	Record has been converted successfully.
Record already exists. Record not created.	Record is already available in the version 6.1.1 database. Typically this message only appears when reconverting the same table.
Parent <module name> record does not exist. Record not created.	The parent of the current record is not available in the version 6.1.1 database. This can happen if you are trying to convert the child table first before converting the parent record, or if the version 5.8.2/5.8.3 database contains some junk records.

Upgrading QAD CRM 6.1 to QAD CRM 6.1.1

Use the following instructions to upgrade QAD CRM from version 6.1 to 6.1.1.

Prior to Upgrade

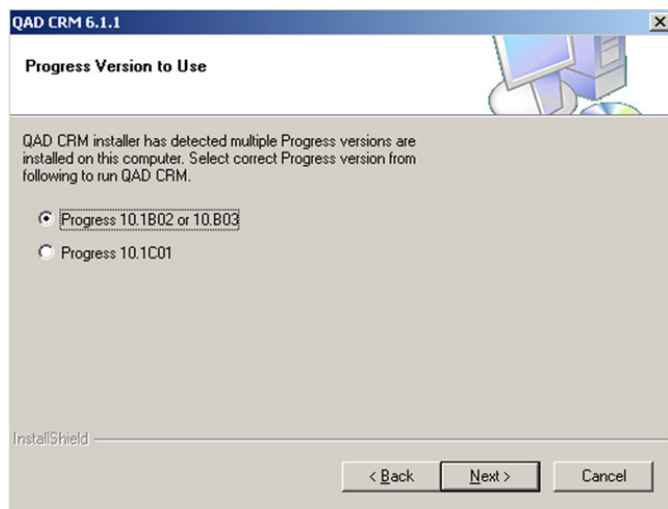
Perform the following steps before upgrading QAD CRM 6.1 to version 6.1.1:

- 1 Make sure the following prerequisite components are installed.
 - The Client Networking and Query Result components of Progress 10.1B02/10.B03 or 10.1C01
 - QAD CRM 6.1 (CRM 6.1build21)
 - The appropriate version of QAD ERP (if you want to integrate QAD CRM with QAD ERP applications)
- 2 If you want to upgrade Progress—for example, from OpenEdge 10.1B02 to 10.1C01—do it prior to upgrading QAD CRM.

- 3 Perform QAD CRM 6.1 data synchronization and back up any CRM 6.1 databases you want to upgrade.

Installing the Upgrade

- 1 Insert the QAD CRM Upgrade installation CD into the CD-ROM drive.
- 2 Execute `setup.exe` from the CD.
- 3 On the QAD CRM Upgrade Wizard Welcome screen, click Next.
- 4 Setup checks if QAD CRM 6.1 is installed. If QAD CRM is not found, a warning message appears. If you see this message, click No to abort the upgrade.
- 5 Accept the license agreement and click Next.
- 6 Setup checks for supported versions of Progress on the computer.
 - If no compatible Progress version (10.1B02, 10.B03, or 10.1C01) is found, Setup displays an error message and aborts the installation.
 - If both Progress 10.1B02/03 and Progress 10.1C01 are installed on the computer, Setup displays the following dialog box.



Select the Progress version you want to use and click Next.

Make sure you choose the correct Progress version since Setup will look for the corresponding Progress version directory to copy Progress ADM2 files to during the installation.

- 7 On the Select a Destination Folder for Backup screen, accept the default location and click Next.
Note QAD CRM 6.1 files are backed up to the `compile` directory under the QAD CRM 6.1 installation directory
- 8 On the Program Folder Name screen, accept the default program folder for QAD CRM and click Next.
- 9 Click Install to start copying files.
- 10 Setup may prompt you to copy some files to the Progress ADM2 directory and overwrite existing Progress files. Click Yes to continue.
Note If Progress 10.1B02 is installed, Setup assumes that Progress 10.1B02 ADM2 files were copied during the CRM 6.1 installation and does not display the message. The message is only displayed if Progress 10.1B03 or 10.1C01 is installed and specified as the version to be used by CRM 6.1.1.
If you click No, a messages warns you that QAD CRM program files may not be successfully compiled later.
- 11 On the QAD CRM Upgrade Complete screen, click Finish.
- 12 When QAD CRM upgrade is complete, Setup creates the QAD CRM 6.1.1 shortcut icons in the QAD CRM program folder.
Setup also creates registry entries under the Windows Registry section named `HKEY_LOCAL_MACHINE\SOFTWARE\QAD Inc.\QADSFAMA\6.1`.

Name	Type	Data
(Default)	REG_SZ	(value not set)
Current Version	REG_SZ	6.1.1
Installationdate	REG_SZ	12-22-2008
Installationfolder	REG_SZ	c:\qadcrm6
InstalledProgFolderDeskT	REG_SZ	C:\Documents and Settings\All Users\Desktop\QAD CRM 6.1
InstalledProgFolderStartM	REG_SZ	C:\Documents and Settings\All Users\Start Menu\Programs\QAD CRM 6.1
InstalledProgressVersion	REG_SZ	10.1C Service Pack 1
QADCRM 6.1 ProgramBackup Dir	REG_SZ	c:\qadcrm6\compile\qadcrm-bakup61
Upgrade Date	REG_SZ	12-22-2008
Upgrade Type	REG_SZ	QADCRM 6.1 to 6.1.1

Setting Up the QAD CRM Environments

After completing the upgrade, you need to change the following system settings:

- File server settings
- Client settings
- Remote Sales settings
- QAD ERP integration settings

Changing File Server Settings

Note Only perform steps 1 and 2 below if you have upgraded the Progress version to be used for CRM from Progress 10.1B02 (or 10.1B03) to Progress 10.1C01 prior to your CRM 6.1.1 upgrade. If no Progress upgrade has been performed, or if Progress version has been upgraded from 10.1B02 to 10.1B03, then steps 1 and 2 are not required.

- 1 If the file server Progress version is the same and the Progress version has not been upgraded, you do not need to change `.ini` files. However, if you change the file server Progress version—for

example, from Progress 10.1B03 to Progress 10.1C01—you will need to modify the `.ini` files to reflect the correct path to the upgraded version of Progress.

Example If the initial Progress version was 10.1B03 and was upgraded to Progress 10.1C01, change the Progress reference from Progress10.1B to the installed directory of Progress 10.1C01. Modify the following files, in addition to any new `.ini` files that may have been created:

- `QADCRMInstallDir\compile\qadsfamacompile.ini`
- `QADCRMInstallDir\prod\qadsfamaproduct.ini`
- `QADCRMInstallDir\test\qadsfamatest.ini`

For the above files, modify all entries for Progress 10.1B in `qadsfamacompile.ini` to point to Progress 10.1C01. See the examples below for reference:

Example `DLC=C:\dlc101b` (Assuming that `C:\dlc101b` refers to the previous Progress 10.1B03 installation directory.) Change it to the correct Progress 10.1C01 reference; for example, `DLC=Progress10.1CInstallDir`.

`PROBUILD=C:\dlc101b\PROBUILD` (Assuming that `C:\dlc101b` refers to the previous Progress 10.1B03 installation directory.) Change it to the correct Progress 10.1C01 reference; for example, `DLC=Progress10.1CInstallDir\PROBUILD`.

- 2 Change the properties of the shortcuts that launch QAD CRM 6.1 Application Compiler and QAD CRM 6.1 Demo. To make the changes, do the following:
 - a Right-click the shortcut on your machine and choose Properties. The Properties window appears.
 - b In the Properties window, open the Shortcut tab.
Change the directory path defined in the Target field to point to the correct versions.

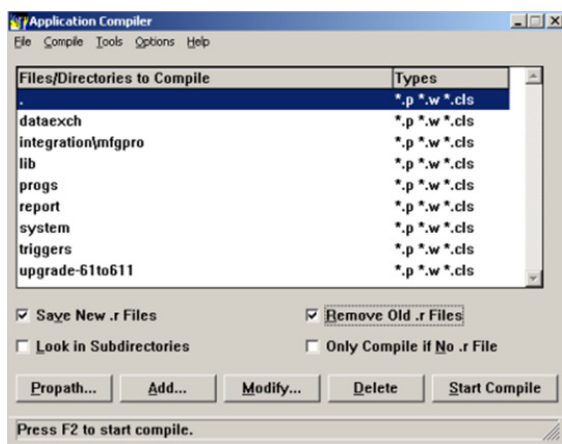


- c Click OK and close the Properties window.

This will ensure that the shortcuts for the QAD CRM 6.1 Application Compiler and QAD CRM 6.1 Demo work correctly. In the same way change the properties of the QAD CRM Demo icon.

Note Subsequent steps are required regardless of whether or not you have upgraded the Progress version to be used for CRM.

- 3 Run QAD CRM 6.1 Application Compiler to compile all the programs. The application compiler should compile the following directories. Make sure to include one new directory.
 - upgrade-61to611
 - dataexch
 - integration\mfgpro
 - lib
 - progs
 - report
 - triggers
 - upgrade-61to611



If you have upgraded the Progress version you plan to use with CRM from Progress 10.1B02 (or 10.1B03) to Progress 10.1C01, then you will also need to use the Application compiler to compile the program called `QADCRMInstallDir\compile\xrc\mfdpers.p`.

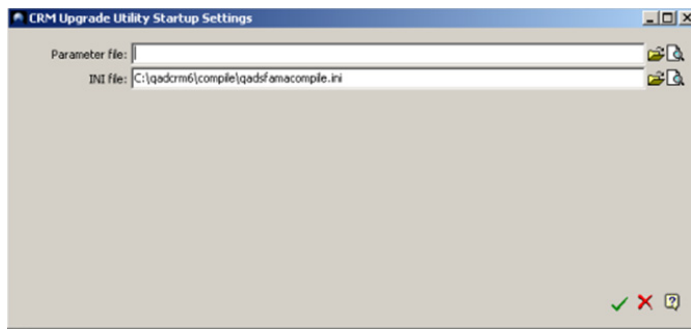
Once all the programs are compiled using Application Compiler and there are no error messages in the log file, proceed to the next step.

- 4 Load the QAD CRM 6.1.1 data using the QAD CRM Upgrade Utility icon for all existing CRM 6.1 systems, such as compile, test, production, and demo.

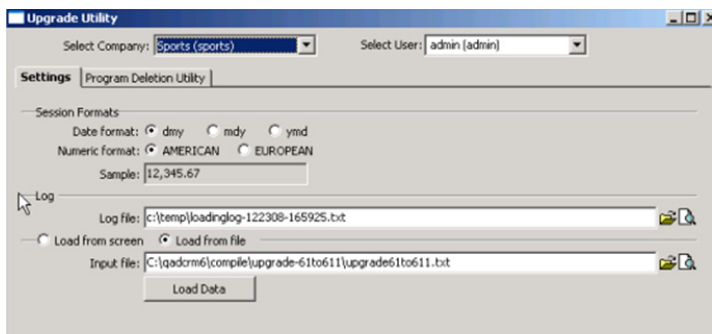
Note Before running the QAD CRM Upgrade Utility on a specific CRM 6.1 system (such as compile or test), make sure that the corresponding CRM databases are running in multi-user mode.

The following interface lets you load QAD CRM 6.1.1 data. Select the appropriate parameter file (`.pf`) using the lookup button.

For example, you can upload the CRM 6.1.1 data into the CRM compile system first. Confirm that the compile database is running in multi-user mode, then select its corresponding `.pf` file in the Parameter File field on the Upgrade Utility initial screen.

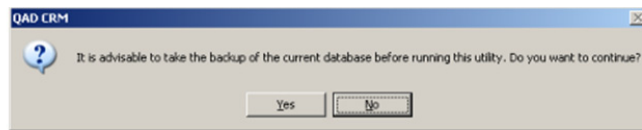


Press the green check button to continue to the next screen.



On the above screen, ensure that you select the correct values for Date and Numeric format.

Select the option Load from File, and then enter the value `QADCRMInstallDir\compile\upgrade-61to611\upgrade61to611.txt` in the field named Input file. Click Load Data to begin loading the QAD CRM 6.1 upgrade data. The following message reminds you to back up your CRM databases before uploading the upgrade data to them.



Once the upgrade routine is run successfully, you are prompted to view the log file. Select Yes. If there are errors, contact QAD Support. Once the data load is complete, you can close the interface.

Note QAD CRM Upgrade Utility can be run multiple times to upgrade different databases—Production, Test, Demo.

- 5 Copy the required `.r`, `.wrx` and `.rpt` files from `QADCRMInstallDir\compile\<sub directories>` to the respective `QADCRMInstallDir\test\<sub directories>` directories. You need to copy the following directories:
 - `QADCRMInstallDir\compile\dataexch`
 - `QADCRMInstallDir\compile\integration\mfgpro`
 - `QADCRMInstallDir\compile\progs`
 - `QADCRMInstallDir\compile\report`
 - `QADCRMInstallDir\compile\system`
 - `QADCRMInstallDir\compile\triggers`
 - `QADCRMInstallDir\compile\lib`
- 6 Test the new environment. If the upgrade is working properly, copy programs from `QADCRMInstallDir\test\` to `QADCRMInstallDir\prod\` folder.
- 7 If QAD ERP integration is enabled, copy the compiled programs (`.r`) into the QAD ERP prod and test environments according to the instructions given in “Changing QAD ERP Integration Settings” on page 94.

Changing Client Settings

Note Only perform steps 1 through 3 below if you have upgraded the Progress version to be used for CRM from Progress 10.1B02 (or 10.1B03) to Progress 10.1C01 prior to your CRM 6.1.1 upgrade. If no Progress upgrade has been performed, or if the Progress version has been upgraded from Progress 10.1B02 to Progress 10.1B03, these steps are not required.

- 1 On the client computer, map a network-accessible drive to the server where Progress 10.C01 is installed.
- 2 Run the file
`S:\Progress10.1C01InstallDir\netsetup\setup.exe`.
 (Assuming that here S:\ is the mapped drive.) This program starts the Progress shared network installation utility for installing Progress 10.1C01 on client computers.

- 3 On each client, modify the `qadsfamaclient.ini` file to reflect correct version of Progress. The file is located in `QADCRMInstallDir`. Modify all entries for Progress 10.1B in `qadsfamaclient.ini` to point to Progress 10.1C01. See the examples below for reference:

Example `DLC=C:\dlc101b` (Assuming that `C:\dlc101b` refers to the previous Progress 10.1B03 installation directory.) Change it to the the correct Progress 10.1C01 reference; for example, `DLC=Progress10.1CInstallDir`.

`PROBUILD=C:\dlc101b\PROBUILD` (Assuming that `C:\dlc101b` refers to the previous Progress 10.1C installation directory.) Change it to the correct Progress 10.1C01 reference; for example, `DLC=Progress10.1CInstallDir\PROBUILD`.

Changing Remote Sales Settings

- 1 Install the Personal Database license for Progress 10.1C01.

Note Only perform this step if you have upgraded the Progress version to be used for CRM from Progress 10.1B02 (or 10.1B03) to Progress 10.1C01 prior to your CRM 6.1.1 upgrade. If no Progress upgrade has been performed, or if the Progress version has been upgraded from Progress 10.1B02 to Progress 10.1B03, this step is not required.
- 2 This step is required regardless of whether or not you have upgraded the version of Progress to be used for CRM.

Copy all `.r`, `.wrx` and `.rpt` files from the file server `\prod` directory. Files from the following directories need to be copied to the remote machine for data synchronization to work:

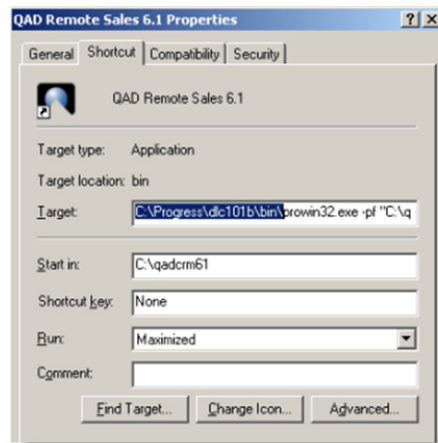
- dataexch
- integration\mfgpro
- lib
- progs
- report
- system
- triggers

- 3 Change the properties of the shortcuts that launch QAD CRM 6.1 Application Compiler and QAD CRM 6.1 Demo. To make the changes, do the following:

Note Only perform this step if you have upgraded the Progress version to be used for CRM from Progress 10.1B02 (or 10.1B03) to Progress 10.1C01 prior to your CRM 6.1.1 upgrade. If no Progress update has been performed, or if the Progress version has been upgraded from Progress 10.1B02 to Progress 10.1B03, this step is not required.

- a Right-click the shortcut on your machine and choose Properties. The Properties window appears.
- b In the Properties window, open the Shortcut tab.

Change the directory path defined in the Target field to point to the correct versions.



- 4 On the remote machine, modify the `qadsfama.ini` file to reflect the correct version of Progress. The file is located in `QADCRMInstallDir`. Modify all entries for Progress 10.1B in `qadsfama.ini` to point to Progress 10.1C01. See the examples below for reference:

Note Only perform this step if you have upgraded the Progress version to be used for CRM from Progress 10.1B02 (or 10.1B03) to Progress 10.1C01 prior to your CRM 6.1.1 upgrade. If no Progress upgrade has been performed, or if the Progress version has been upgraded from Progress 10.1B02 to Progress 10.1B03 then this step is not required.

Example `DLC=C:\dlc101b` (Assuming that `C:\dlc101b` refers to the previous Progress 10.1B03 installation directory.) Change it to the correct Progress 10.1C01 reference; for example, `DLC=Progress10.1CInstallDir`.

`PROBUILD=C:\dlc101b\PROBUILD` (Assuming that `C:\dlc101b` refers to the previous Progress 10.1B03 installation directory.) Change it to the correct Progress 10.1C01 reference; for example, `DLC=Progress10.1CInstallDir\PROBUILD`.

Changing QAD ERP Integration Settings

If QAD ERP integration is enabled, update the following environments.

Updating the Test Environment

Copy the `.r` files from QAD CRM folders listed below to the corresponding directories of

`MFGPROInstallDir/Integration/test`:

- `QADCRMInstallDir\compile\integration\mfgpro`
- `QADCRMInstallDir\compile\triggers`
- `QADCRMInstallDir\compile\system`
- `QADCRMInstallDir\compile\dataexch`
- `QADCRMInstallDir\compile\progs`
- `QADCRMInstallDir\compile\report`
- `QADCRMInstallDir\compile\lib`

Copy the following directories from `MFGPROInstallationDir\US` to `QADCRMInstallDir\test\us`:

- `fs`
- `gp`
- `lg`

- mc
- px
- qq
- sq
- tx

Note If you have recompiled

`QADCRMInstallDir\compile\xrc\mfdpers.p` in one of the steps under the section called Changing File Server Settings (because you have upgraded your Progress version prior to the CRM 6.1.1 Upgrade), then you will also need to copy the rcode file named `QADCRMInstallDir\compile\xrc\mfdpers.r` into the following folder:

`QADCRMInstallDir\test\mfgsrv\us`

Updating the Production Environment

Copy the .r files from QAD CRM environment to the corresponding directories of `MFGPROInstallDir/Integration/prod` listed below:

- `QADCRMInstallDir\compile\integration\mfgpro`
- `QADCRMInstallDir\compile\triggers`
- `QADCRMInstallDir\compile\system`
- `QADCRMInstallDir\compile\dataexch`
- `QADCRMInstallDir\compile\progs`
- `QADCRMInstallDir\compile\report`
- `QADCRMInstallDir\compile\lib`

Note If you have recompiled

`QADCRMInstallDir\compile\xrc\mfdpers.p` in one of the steps under the section called Changing File Server Settings (because you have upgraded your Progress version prior to CRM 6.1.1 Upgrade), then you will also need to copy the rcode file named `QADCRMInstallDir\compile\xrc\mfdpers.r` into the following folder:

`QADCRMInstallDir\prod\mfgsrv\us`



Chapter 5

Compilation with Progress 64 Bit

In a scenario where the Progress version installed on Windows is 32 bit and the Progress version installed on Linux is 64 bit, you must recompile some QAD ERP programs on Windows and some CRM programs on Linux.

Compiling QAD ERP on the File Server **98**

Compiling QAD CRM on the Database Server **102**

Compiling QAD ERP on the File Server

- 1 Access the QAD Support Knowledge base and locate the kbase ID of qad64455, then download the attached `compilelist.txt` file. This file contains a list of standard QAD ERP application programs that need to be recompiled. If your QAD ERP configuration includes any customized programs or triggers, you should add their program names to the end of the `compilelist.txt` file. This allows them to be recompiled if they impact the CRM/QAD ERP integration.
- 2 To compile QAD ERP programs, MFGUTIL must be installed on the Windows file server. This utility is installed with the QAD ERP data server. Follow the instructions in the “Install Database Server Files” section of your QAD ERP application installation guide.

Once MFGUTIL is installed:

- 1 Right-click on MFGUTIL (GUI) to open its properties.
- 2 Modify the properties to include the `-rx` parameter. If Progress OE Studio/ProVision Plus license is installed instead of Progress Client Networking, this parameter is not required.

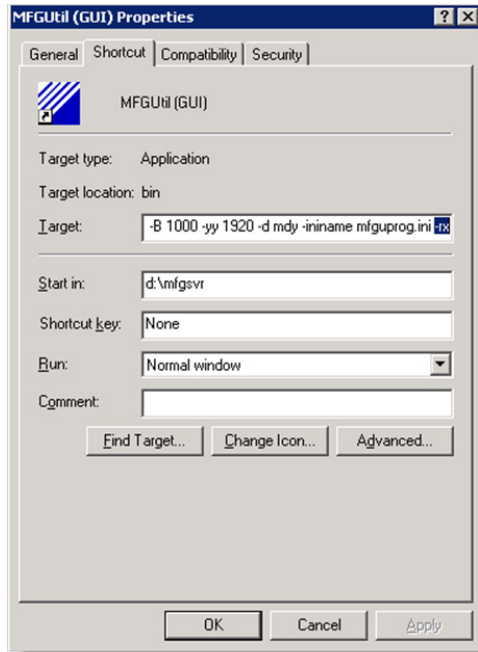
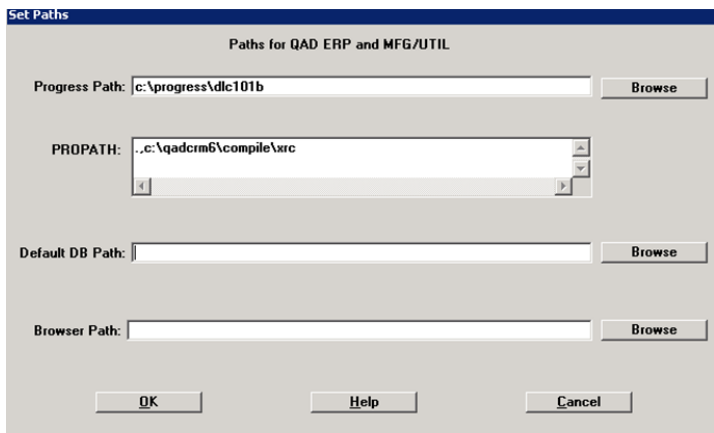


Fig. 5.1
MFG/UTIL
Properties Dialog
Box

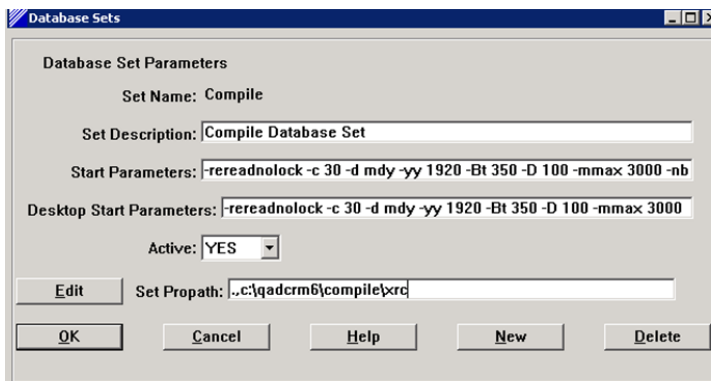
- 3 Launch MFG/UTIL (GUI).
- 4 On the Configure menu, click Set Paths for QAD ERP and MFG/UTIL.
- 5 In the Set Paths dialog box, modify the Propath to *QADCRMInstallDir\compile\xrc* and leave the Default DB Path blank. Also, confirm that the Progress Path field is pointing to the correct version of Progress being used for CRM 6.1.1. After you set the correct paths, click OK.

Fig. 5.2
Set Paths Dialog
Box



- 6 On the Configure menu, click Database Set Maintenance.
- 7 In the Database set Configuration dialog box, select the Compile database set and then click Edit Set.
- 8 Set Active to Yes and enter the value of Set Propath as *QADCRMInstallDir\compile\xrc*; then click OK.

Fig. 5.3
Database Sets
Dialog Box



- 9 Edit the parameters of the mfgempty, hplempty, and admempty databases.

To edit database parameters:

- a Select the database and click Edit DB.
- b In the Database Parameters dialog box, set connection type to ClientServer, and enter correct values for the other fields to connect to the database.

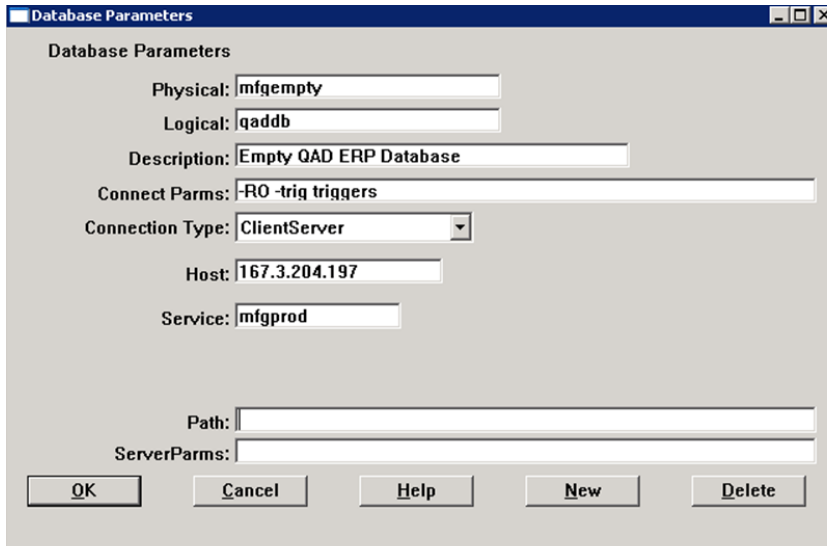
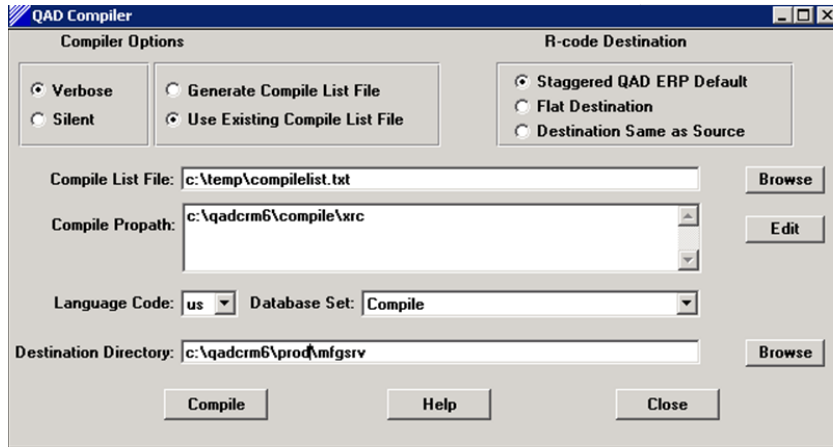


Fig. 5.4
Database
Parameters Dialog
Box

- c Click OK.
- 10 If you have not implemented the Enhanced Controls module in QAD ERP, you can select the audempty database in the Database Set Configuration dialog box and click Delete DB to remove it.
 - 11 Click OK.
 - 12 On the Programs menu, click Compile Procedures.
 - 13 In the QAD Compiler dialog box, do the following:
 - In the Compile List File field, specify the path to the compilelist.txt file.
 - Set the Compile Propath to `QADCRMInstallDir\compile\xrc`.

- In the Destination Directory, specify `QADCRMInstallDir\prod\mfgsrv`.

Fig. 5.5
QAD Compiler



- 14 Click Compile. When compilation is complete, check the log file to make sure all the programs are compiled correctly.
- 15 If no errors are found, copy the mfgsrv folder from the prod directory to the test directory.

Compiling QAD CRM on the Database Server

- 1 Copy all the .p and .i programs from the following directories on the Windows File Server into their corresponding directories in `QADCRMInstallDir/integration/prod` on the Linux Server:
 - `QADCRMInstallDir\compile\integration\mfgspro`
 - `QADCRMInstallDir\compile\triggers`
 - `QADCRMInstallDir\compile\system`
 - `QADCRMInstallDir\compile\dataexch`
 - `QADCRMInstallDir\compile\progs`
 - `QADCRMInstallDir\compile\report`

2 Do the following using a Progress client session on the Linux server:

- a** Connect to the QAD CRM compile database.
- b** Connect to the QAD ERP compile database.
- c** Use the following parameters along with the connection parameters:

```
-Bt 10000
-mmax 65534
-L 50000
-yy 1950
-cpinternal iso8859-1 -cpstream iso8859-1
-inp 32000
-tok 4096
-T c:\temp
-zn
-tmpbsize 8
-s 128
-noincrwarn
-h 8
-q
```

- d** Include the following in the propath:

```
QADERPInstallDir/xrc
QADERPInstallDir/integration/prod
QADERPInstallDir/integration/prod/system
QADERPInstallDir/integration/prod/dataexch
QADERPInstallDir/integration/prod/progs
QADERPInstallDir/integration/prod/report
QADERPInstallDir/integration/prod/triggers
QADERPInstallDir/integration/prod/integration/mfgpro
```

3 On the Tools menu, choose Application Compiler.

4 Select the following directories to compile:

- *QADERPInstallDir/integration/prod/system*
- *QADERPInstallDir/integration/prod/dataexch*
- *QADERPInstallDir/integration/prod/progs*
- *QADERPInstallDir/integration/prod/report*
- *QADERPInstallDir/integration/prod/triggers*
- *QADERPInstallDir/integration/prod/integration/mfgpro*

5 Choose the Start Compile option. When compilation is complete, check the log file to make sure all the programs are compiled correctly.

- 6 If no errors are found, copy the compiled programs (rcode) from the following directories to corresponding directories in *QADERPInstallDir/integration/test*.
 - *QADERPInstallDir/integration/prod/system*
 - *QADERPInstallDir/integration/prod/dataexch*
 - *QADERPInstallDir/integration/prod/progs*
 - *QADERPInstallDir/integration/prod/report*
 - *QADERPInstallDir/integration/prod/triggers*
 - *QADERPInstallDir/integration/prod/integration/mfgpro*

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