vtiger CRM 4.2

Installation Guide for Linux OS

(Revision: 4.2)

Contents

1. System Requirements

- **Hardware:** x486 and above with 256 MB RAM or higher with minimum 100 MB disk space.

- **Operating System:** RedHat Linux 7.2/8.0/9.0, SuSe 9.0, Debian 3.0, Mandrake 10.0, and Fedora Core 3.

- **Web Server:** Apache 2.0.40 and above.

- **Database:** MySQL 4.0.X and above.

- **PHP:**   4.2.X through 4.3.X versions.

- **Web Browser:** Netscape 7.0 and above, Mozilla 1.4 and above, or Opera 7.21 and above.

2. Linux Dependency Packages

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Red Hat 7.2/8.0/9.0	Debian 3.0(woody)	SuSe 9.0	Mandrake 10.0	Fedora Core 3.0	Mac OS X 10.3
libpng	xlibs	bison-1.35.tar.gz	libxfree86-dev	libpng	freetype2
libpng-devel	xlibs-dev	flex-2.5.4a.tar.gz	libjpeg	libpng-devel	expat
libjpeg	libgd2	libpng-1.2.5.tar.gz	freetype	libjpeg	jpegsrc
libjpeg-devel	libfreetype6	zlib-1.2.1.tar.gz	libfreetype	libjpeg-devel	libpng
freetype	libfreetype6-dev	xpm-3.4g.tar.gz	libpng	freetype	zlib
freetype-devel		jpegsrc.v6b.tar.gz	zlib	freetype-devel	
zlib	zlib-1.2.1	freetype2-devel-2.1.7-53.i586.rpm	Xfree86	zlib-devel	
Xfree86-dev	libpng-1.2.5	XFree86-devel-4.3.99.902-40.i586.rpm	libxfree86	xorg-x11	
	jpeg-6b			xorg-x11-dev	
	/usr/lib/libjpeg.so.62.0.0 or /usr/lib/libjpeg.so				
	/usr/lib/libjpeg.so.62.0.0 or /usr/lib/libjpeg.so.62				

Red Hat 7.2/8.0/9.0	Debian 3.0(woody)	SuSe 9.0	Mandrake 10.0	Fedora Core 3.0	Mac OS X 10.3
	/usr/local/lib/libpng12.so.0 or /usr/local/lib/libpng12.so				
	/usr/local/lib/libpng12.so.0				

3. Installation Prerequisites

- Please ensure that you have **administrator privileges** on the system. If you are installing with any other user privileges, the vtiger CRM software will not be installed properly.

- Before installing the vtiger CRM software, stop the Apache and MySQL services (If running in your system).

- The vtiger CRM software is compatible with Apache 2.0.40 and above and MySQL 4.0.X. If these software are already installed in your machine, you can use the same. Otherwise use the Apache and MySQL bundled with the vtiger CRM software.

4. Installing vtiger CRM

To work with vtiger CRM, you must have Apache, MySQL, and PHP installed in you machine. You can install vtiger CRM according to your software requirements:

- Install complete package of vtiger CRM - **vtiger_CRM_4_2.bin**.

  Note: Use this package if you have not installed Apache, MySQL, and PHP packages in your machine.

- Install vtiger CRM without Apache and MySQL - **vtiger_CRM_4_2.bin**

  Note: This package is same as above except that you may not install Apache and MySQL. But PHP package will be installed even though it is available in your machine. Use this package if you have already installed Apache and MySQL, packages in your machine.

- Install only vtiger CRM source - **vtiger_CRM_4_2_Source.zip**.

  Note: Use this package if you have already installed Apache, MySQL, and PHP in your machine.

Installing Combined vtiger CRM, Apache, and MySQL

For the convenience of first time users, vtiger CRM is bundled with compatible versions of Apache, MySQL, and PHP.

Follow the procedure given below to install the complete package of vtiger CRM:

1. Download **vtiger_CRM_4_2.bin** from the following URL:

   http://www.sourceforge.net/projects/vtigercrm/

2. Log in as a `root` user.

3. Grant execute permission to run the **vtiger_CRM_4_2.bin** file:

   ```
   #chmod 777 vtiger_CRM_4_2.bin
   ```

4. Run the **vtiger_CRM_4_2.bin** file as given below:

   ```
   #./vtiger_CRM_4_2.bin
   ```
   Please read the license agreement and enter **Y** to start the installation process or **N** to abort the installation.

5. To install the Apache follow the procedure given below:

I. Press **Y** key to install the Apache when the following message is displayed:

```
Do you want to install Apache 2.0.50 that is bundled with
vtiger CRM.
```

II. Specify the absolute path for installing the Apache when the following message is displayed:

```
Specify the absolute path for installing vtiger CRM (For
example /home/vtiger) and then press ENTER
```

III. Press **Y** key to create a new directory if it does not exist, when the following message is displayed:

```
Please type yes (y) or no (n): /home/<vtiger CRM directory
> directory does not exist. Create it now?
```

IV. Specify the Apache port number when the following message is displayed:

```
Specify the port where you wish to start Apache: Port
Number
```

6. To install the MySQL follow the procedure given below:

I. Press **Y** key to install the MySQL when the following message is displayed:

```
Do you want to install the MySQL 4.0.20 that is bundled
with vtiger CRM?
```

II. Specify the MySQL port number, user name, and password. If the port you have specified is free, installation process will continue otherwise specify a different port.

7. Installation details, such as Apache, MySQL, PHP, and GD library are displayed. Press **C** to continue or **Q** to abort the installation. Installation process takes approximately 5 minutes.

8. Press **Y** to start the vtiger CRM server immediately when the following message is displayed:

```
Do you want to start the vtigerCRM server?
```

Otherwise, you can start the server by running the startvTiger.sh file present under the <vtiger CRM Home>/bin directory.

Installing vtiger CRM without Apache and MySQL

If you have already installed Apache (version 2.0.44 through 2.0.50) and MySQL 4.0.X and above in your machine, follow the steps given below:

1. Download **vtiger_CRM_4_2.bin** from the following URL:

    http://www.sourceforge.net/projects/vtigercrm/.

2. Log in as a **root** user into the system.

3. Grant execute permission to run the **vtiger_CRM_4_2.bin** file:

    ```
    #chmod 777 vtiger_CRM_4_2.bin
    ```

4. Run the **vtiger_CRM_4_2.bin** file as given below:

    ```
    #./vtiger_CRM_4_2.bin
    ```

    Please read the license agreement and enter Y to start the installation process or N to abort the installation.

5. Follow the steps given below to use the existing Apache:

    i. Type "n" to use the existing Apache, when you get the following message:

        ```
        Do you want to install Apache, 2.0.50 that is bundled
        with vtiger CRM ? Yes(y)/No(n):
        ```

    ii. Type "y" to continue to use the existing Apache when you get the following message:

        Do you want to continue Yes(Y)/No(N): <**Enter y if you are sure>**

    iii. Enter the location of the Apache directory:

        Specify the location of Apache in your system (For example /etc/httpd):

        If you are not providing the correct path, following message is displayed:

        Kindly provide the location for httpd file in your system (example: /usr/sbin):

        Note: If the specified path or Apache version is not compatible, system prompts to install the bundled Apache.

iv.   Enter the port where you wish to start the Apache, when the following message is displayed:

Specify the port where you wish to start the Apache:

Note: If some other application is running in the specified port, you can chose a different port by typing **N** or close the application by typing **C**.

6. Follow the steps given below to use the existing MySQL:

i.   Type "n" to use the existing Apache, when you get the following message:

Do you want to Install the MySQL 4_0_20 that is bundled with vtigerCRM ? Yes(Y)/No(N):

ii.   Enter the MySQL directory, when the following message is displayed:

Enter the absolute path of MySQL installed in your system:

iii.   Enter the MySQL connection parameters, such as Port number, User name, Password, and MySQL socket file location.

Note: If you enter wrong details, following message is displayed:

```
Either some other application is running on the port
specified or there might be some errors in the
connection parameters. Kindly start the specified mysql
server and press C to continue with installation, press
Y to re-enter the connection parameters, N to install
the bundled MySQL or Q to quit: y
Kindly re-enter the mysql connection parameters
```

7. If you have provided correct details in Step 1 through 6, all your input details are displayed. Read the details and type **C** to continue or **Q** to abort the installation.

8. Installation process takes approximately 5 minutes. Please ignore the messages displayed in console during installation.

9. Once installation is successfully completed, the following message is displayed:

```
*********************** INFO ***************************
Product Successfully installed
Kindly use the link http://<hostname>/vtiger/install.php
through your browser to start using the product
*******************************************************
```

Copy the URL displayed in the console to the Web browser and configure the vtiger CRM server.

10. Start your existing Apache and complete the vtiger CRM configuration.

Installing only vtiger CRM

If you have already installed Apache, MySQL, PHP, and all other necessary dependency packages, follow the procedure given below:

1. Download **vtiger_CRM_4_2_Source.zip** from the following URL:

   http://www.sourceforge.net/projects/vtigercrm/.

2. Extract the **vtiger_CRM_4_2_Source.zip** file into Apache root directory.

3. Start the MySQL database and create a database for vtige CRM. The default database name is vtigercrm4_2. If you want to use different database then modify the 2setConfig.php file present under the *<vtiger CRM Home>/install/* directory as given below in all the places.
   ```
   $db_name = 'vtigercrm4_2'; to
   $db_name = '<your database name>';
   ```

   In the **connection.php** file present under the *<vtiger CRM Home>* directory, populate the values for the following variables:

   ```
   $mysql_username
   $mysql_password
   $mysql_port
   $apache_port
   ```

   Example:
   ```
   $mysql_username = 'root';
   $mysql_password = 'public';
   $mysql_port = '3306';
   $apache_port = '0.0.0.0:80';
   ```

4. Start Web Browser and follow the procedure given in the "Configuring vtiger CRM Server" section for completing the vtiger CRM installation.

Note: You must increase the value for **max_execution_time** in **php.ini** file as it takes about 300 seconds to execute the vtiger CRM installation script. By default the value is set as 30 seconds.

5. Starting and Stopping vtiger CRM

- To start the vtiger CRM server, run the following command from the *<vtiger Home>/bin* directory:

  #sh startvtiger.sh

- To stop the vtiger CRM server, run the following command from the *<vtiger Home>/bin* directory:

  #sh stopvtiger.sh

Note: The start and stop scripts are not bundled with **vtiger_CRM_4_O_Source.zip**. Hence you have to start MySQL and Apache manually and then configure the vtiger CRM server.

6. Configuring vtiger CRM Server

1. Start the Web Browser and enter *<localhost>/vtigerCRM/index.php* in location bar.

2. In the *Registration* page, complete the product registration (optional). Click the **Next** button.

3. In the *System Check* page, PHP, MySQL database, config.php, directories that have read/write permissions, and GD graphics library version status are displayed. Click the **Next** button.

   Note: Please ensure that all the directories have the read/write permission; otherwise, you cannot work with features that require file upload and download.

4. In the *Database Configuration* page, enter the appropriate values for Database and Site Configuration sections.

   Database Configuration

   - **Host Name** *(mandatory)* – By default, Host Name is set as **<Machine Name>:<port number>**. Please do not change the port number as it is added during installation.

   - **User Name** *(mandatory)*– vtiger (Non-editable).

   - **Password (optional)**– currently Non-editable.

   - **Database Name** *(mandatory)*– vtiger (Non-editable).

   Site Configuration

   - **URL** *(mandatory)* – Enter the host name. By default, it is http://<machine name>.

   - **path** *(mandatory)* – By default, this is the path where vtiger CRM is installed.

   - **Path to Cache Directory (must be writable)** - By default, this is cache/. This folder is used to store the files, such as attachments, and import/export- related files temporarily.

   Admin Configuration

   - **username** – By default, the user name is set as "admin".

- **admin password** *(mandatory)* – By default, the password is set as "admin". You can change password after logging in to the vtiger CRM.

- **email address** – Enter the administrator's E-mail address.

5. In the *Confirm System Configuration* page, review the configuration information. If you want to change the details, click the **Change** button. If you want to populate some data, select the **Also populate demo data?** check box. Now click the **Create** button.

6. In the *Create Config File* page, click the **Next** button.

7. In the *Create Database* Tables page, the created database tables are displayed. Click the **Finish** button to complete the installation process.

8. In the *Login* page, by default the **User Name** field is set as "admin". In **Password** field, enter the **admin password** you have set during installation process. Once you logged in successfully, your vtiger CRM launches as given below:

---

9. Configuring Notification Scheduler

You can schedule the notifications, such Big deals, pending tasks, event reminder, support start/end, and others by changing your Apache Web server port in **sendreminder.sh** file present under <vtiger CRM Home>cron/ directory as given below:

```
wget http://localhost:APACHEPORT/SendReminder.php -O intimatelog.tx
```

10. Fetching E-mail Messages as RSS Feeds

You can fetch incoming E-mail messages as RSS feed in RSS module by specifying appropriate values in **mailfeed.php** file present under *<vtiger CRM Home>/modules/squirrelmail-1.4.4* directory as given below:

Line 33 through 61

POP3/IMAP/NNTP server to connect to, with optional port.

$server = "test.com:143";

 Protocol specification (optional)

$protocol = "/notls";

Name of the mailbox to open

$mailbox = "INBOX";

Your username

$username = "user-name";

Your password

$password = "password";

11. Troubleshooting Tips

1. The "Forbidden" message is displayed in Web browser while starting vtiger CRM through Web browser:

Edit the **httpd.conf** file present in the *<vtiger_CRM _home>/installs/apache/conf* directory and make the following changes:

```
old <Directory /> new <Directory /home/<user>
```

Grant permission to execute the **httpd.conf** file: `#chmod -R 777 /home/<user>`

Restart the Apache server from the Apache installation directory:

```
#./bin/httpd -d . -f ./conf/httpd.conf -k stop
#./bin/httpd -d . -f ./conf/httpd.conf -k start
```

2. By default, the value for **log4php.rootLogger** is set as "debug" in **log4php.properties** file present under *<vtiger CRM Home>* directory. If you experience any problems, change the logging level to "fatal" or "warning"

Line: 10

```
log4php.rootLogger=debug, A2
```

12. Known Issues

- During vtiger CRM installation if you aborted the installation process, a temporary directory called vtigerCRM_linux is created under installation directory. This directory is not deleted automatically and you have to delete it manually.

- If you create a new role with space (for example, Sales User) in the name, then you will have issues allocating permissions.

- You cannot change the user's role once specific role is assigned to the user.

- If you are migrating from older version (v3.0, v3.2, v4.0, or v4.0.1) to vtiger CRM 4.2, immediately after logging as "admin" user, assign roles to all the other users. Otherwise, users cannot log in and the "**UserInfoUtil at line 10"** error message is displayed in browser.

13. Related Documents

You can refer to the following documents to use the vtiger Outlook Plug-in software with vtiger CRM:

- vtiger Outlook Plug-in User Manual: (Refer to: http://vtiger.com/products/crm/help/vtiger_Outlook_Plugin_User_Guide.pdf).

- vtiger Office Plug-in User Manual: (Refer to: http://vtiger.com/products/crm/help/vtiger_Office_Plugin_User_Guide.pdf).

- vtiger Thunderbird Extension User Manual: (Refer to: http://vtiger.com/products/crm/help/vtiger_Thunderbird_Extension_User_Guide.pdf)

- vtiger Customer Portal User Manual: (Refer to: http://vtiger.com/products/crm/help/vtiger_Customer_Portal_User_Guide.pdf)

Note: The vtiger Outlook Plug-in, vtiger Office Plug-in, and vtiger Thunderbird Extension are browser-side software works only with Microsoft Outlook, Microsoft Office, and Thunderbird/Mozilla E-mail clients respectively.

14. Customer Support

Please post your valuable comments, feature requests, and issues in **vtiger Discussions** (http://www.vtiger.com/discussions/) so that we can provide technical support for you.