



Installation Guide

Getting Started

1. Download the Project
2. Deploy WAR file through Tomcat
 - a) Change name of war file from “salesportal-tomcat5-geronimo-1.2.0.war” to “salesportal.war”
 - b) Upload war file into tomcat folder
 - c) restart tomcat or start the application.

* If this is your first install, browse to <http://youripaddress:8080/salesportal/home> (Redhat) or <http://youripaddress:8180/salesportal/home> (Ubuntu) and follow through the Automated Installation Wizard to properly set up your Sales Portal database, email settings and Company Information. You can skip step 3 and 4 of this Installation Manual and continue on Step 5, Setting up the Sales Portal Configurations.

Updating Your Sales Portal Application

3. If you are updating your Sales Portal, you are going to need to do a couple things to make sure your application is updated properly.
 - After deploying the application, open the appConfig.xml under the salesportal/xml_config directory.
 - Paste :

```
<INITIAL_STARTUP_PERFORMED>YES</INITIAL_STARTUP_PERFORMED>
```

at the bottom of the appConfig.xml. Resave the file. Restart Tomcat or the Sales Portal application.

Updating your Sales Portal database to fit your current Sales Portal Application.

4. To fit your current version of Sales Portal, you will need to update your database. To update your database, go into the db_scripts directory in this download package. Run the appropriate db_correction script for your current version. For example:

Example:

You are currently running Sales Portal 1.1.1 and would like to upgrade to Sales Portal 1.2.0, you will need to run -

- db_corrections1.1.2
- db_corrections1.1.3
- db_corrections1.1.4
- db_corrections1.2.0

* Running these scripts will update your database with the appropriate changes needed for Sales Portal 1.2.0

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** If you have gone through the Automated Installation Wizard or successfully done steps 3 and 4, you are now ready to configure your Sales Portal Application

Setting up the Sales Portal Configurations

5. Start setting up the Sales Portal configurations:
 - a) The application will be located at :
 - <http://youripaddress:8080/salesportal/home> (Redhat install)
 - <http://youripaddress:8180/salesportal/home> (Ubuntu install)
 - b) The initial sign on user is **admin** the initial password is **admin**
 - c) User admin has the menu options for for administration and admin/config.
 - Please refer to the Administration Manual for details on each option.
 - Company – change the default company name to your company.
 - Salesman – create salesman
 - Territory – territories are used to group prospects and customers. A Territory must be linked to a salesman
 - User defined codes – these allows you to classify, sort and select customers and prospects:
 - Line of Business
 - Status Code
 - System Type
 - Software Type

Admin Configuration

6. Setup Admin Configuration
 - a) This contains application setup parameters including email server for sending Next Sales Actions emails. - see the Administration Documentation for details.

Updating Sales Portal with your Company Logo

7. Change the Logo to your own logo.
 - a) The logo is located in the graphics folders and is called logo.gif
 - b) This can be replaced with your own logo.
 - c) 104 pixels height, 144 pixels length fits well

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Data Conversion

8. Data Conversion – the Sales Portal database of prospects and customers can be loaded from a CSV file.
 - a) Create a CSV file of the data
 - Open Office Calc and Excel allow you to save data into CSV format.
 - b) The CSV file can be updated from the administration menu, Import Data Option– see the Administration Documentation for details.
 - The layout of the CSV file is listed on the Import Data Option. Make sure commas are removed from inside fields such as name and address:
 - CSV File Layout: 1(A) - Company, 2(B) - Contact, 3(C) - Address 1, 4(D) - Address 2, 5(E) - City, 6(F) - State, 7(G) - Zip, 8(H) - ID, 9(I) - Phone, 10(J) - Fax, 11(K) – Title, 12(L) - System, 13(M) - SIC, 14(N) - Size, 15(O) - Verified, 16(P) - Software, 17(Q) -LOB, 18(R) - Website, 19(S) - Email, 20(T) - County, 21(U) – Territory
 - Note, since this is a comma separated file, make sure you scan your data and replace all commas with a blank or other character before uploading. Upload size limited is about 10,000 records per upload.*
 - c) Review your data thru the application
 - d) Removing the imported data. If there is a problem with your upload. You can use the Delete Imported Data option to remove all data imported on a specific date.

Information Page

9. Information Page – the Information page allows you to create a page with information for your sales force and system users. It can also contain web links.
 - a) The Information page is located in webpages and is called info.html. This can be replaced with your own custom page, but needs to have info.html as the name.

Requirements

1. Postgres 7.3 or greater
2. Application Server:
 1. Tomcat 4 – Sales Portal Tomcat4 version
 2. Tomcat 5/Geronimo – Sales Portal Tomcat 5-Geronimo version
3. Web browser: Mozilla Firefox / IE



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Troubleshooting FAQ

- Q.** The application seems to be running fine, however the email content returns an error, what do I need to do to fix?
- A.** You will need to open up the appConfig.xml located in the salesportal/xml_config directory and change the LOCAL_COMPLETE_URL to the correct address and port number. Most commonly, this will be changing from port 8080 to 8180, or vice versa 8180 to 8080.