



vtiger CRM 5.0.2 Installation Manual (For Linux OS)

Document History

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1. System Requirements

- **Hardware:** x486 and above with 512 MB RAM or higher with minimum 250 MB disk space.
- **Operating System:** RedHat Linux 7.2/8.0/9.0, SuSe 9.0, Debian 3.0, Mandrake 10.0, or Fedora Core 3.
- **Web Server:** Apache 2.0.40 and above.
- **Database:** MySQL version 4.1.x through 5.1.x.
- **PHP:** 5.0.x through 5.1.x.
- **Web Browser:** Firefox 1.5.x and above or Opera 7.21 and above.

2. How do I choose right distribution?

vtiger CRM software is available in both executable and source formats. You can choose the right distribution according to your experience with LAMP/WAMP based applications.

Recommended vtiger CRM Distributions

Type of User	Type of Distribution
I am new to Web-based software – Beginners	vtigercrm-5.0.2.bin
I have hands-on experience with Apache and MySQL, but not familiar with PHP – Intermediate Users	vtigercrm-5.0.2.bin
I have hands-on experience with MySQL and PHP based applications – Advanced PHP Users/Developers/Hosting Service Providers	vtigercrm-5.0.2.tar.gz

3. Linux Dependency Packages

Disclaimer: This chapter is for informational purposes only and is provided "AS IS", without any express or implied warranties.

Red Hat	Debian	SuSe	Mandrake	Fedora	Mac OS
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	lib-1.2.1.tar.gz	libfreetype	libjpeg-devel	libpng
freetype	libfreetype6-dev	pm-3.4g.tar.gz	libpng	freetype	zlib
freetype-devel		jpegsrc.v6b.tar.gz	zlib	freetype-devel	imap-2004d
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	
openssl	jpeg-6b	openssl	openssl	xorg-x11-dev	
openssl-devel	/usr/lib/libjpeg.so.62.0.0 or /usr/lib/libjpeg.so	openssl-devel	openssl-devel	openssl-devel	
krb5-devel	/usr/lib/libjpeg.so.62.0.0 or /usr/lib/libjpeg.so.62	heimdal-devel	krb5-devel	krb5-devel	
imap-2004d	/usr/local/lib/libpng12.so.0 or /usr/local/lib/libpng12.so	Imap-2004d	imap-2004d	imap-2004d	

Red Hat	Debian	SuSe	Mandrake	Fedora	Mac OS
	/usr/local/lib/libpng12.so.0				
	Unzip				
	openssl				
	libssl-dev				
	libkrb5-dev				
	imap-2004d				

4. Installation Prerequisites

- Please ensure that you have **administrator privileges** on the system. If you are installing without administrator privilege, vtiger CRM software will not be installed properly.
- Before installing vtiger CRM 5 software, stop the Apache and MySQL services.
- vtiger CRM 5 software is compatible with Apache 2.0.40 and above, MySQL 4.1.x through 5.1.x and PHP 5.0.x through 5.1.x. If these software are already installed in your system, you can use the same. Otherwise use the Apache and MySQL bundled with vtiger CRM software.
- Read/Write permissions for some of the vtiger CRM directories – ***Applicable to vtiger CRM Source Installation***
- PHP settings (php.ini) configuration - ***Applicable to vtiger CRM Source Installation***

5. Installing vtiger CRM

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

- Install vtiger CRM complete package – [vtigercrm-5.0.2.bin](#)

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

- Install vtiger CRM with bundled PHP – [vtigercrm-5.0.2.bin](#)

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

- Install only vtiger CRM source – [vtigercrm-5-0-2.tar.gz](#).

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

5.1 Installing Complete Package

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 [vtigercrm-5.0.2.bin](#) from the Sourceforge.net.
2. Log in as a **root** user.
3. Grant execute permission to run the **vtigercrm-5.0.2.bin** file:

```
#chmod 777 vtigercrm-5.0.2.bin
```

4. Run the **vtigercrm-5.0.2.bin** file as given below:

```
#!/vtigercrm-5.0.2.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 MySQL 5.0.19 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 vtiger CRM server immediately when the following message is displayed:

Do you want to start vtiger CRM server?

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

5.2 Installing without Apache and MySQL

If you have already installed Apache version 2.0.40 and MySQL 4.1.x and above in your system, follow the steps given below:

1. Download [vtigercrm-5.0.2.bin](#) from the Sourceforge.net.
2. Log in as a **root** user into the system.
3. Grant execute permission to run the **vtigercrm-5.0.2.bin** file:

```
#chmod 777 vtigercrm-5.0.2.bin
```

4. Run the **vtigercrm-5.0.2.bin** file as given below:

```
#./vtigercrm-5.0.2.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 5_1_19 that is bundled with vtiger CRM? 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. 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 vtiger CRM server.

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

5.3 Installing vtiger CRM Source

If you are already using WAMP environment for other PHP based applications, you can very well use the same setup for vtiger CRM installation, provided your setup meets the vtiger CRM requirements.

IMPORTANT NOTE

vtiger CRM Source installation is only for the **Advanced Users, Developers, and Hosting Providers**. Beginners and Intermediate Users of PHP based applications are strongly recommended to use the vtiger optimized LAMP setup (**vtigercrm-5.0.0.bin**). If you are using PHP- based application first time, please skip this section and follow the steps in [5.1 Installing Complete Package](#)

How to get LAMP?

LAMP stands for Linux, Apache, MySQL, and PHP. You can download the optimized Apache, MySQL, and PHP package from various sources. The most popular sites that provide LAMP package are [BitRock](#) and [LAMPP](#). There are many other Websites offers LAMP distributions freely.

Before using your own LAMP setup, please ensure that Apache, MySQL, and PHP versions meet the vtiger CRM requirements.

- Apache – 2.0.40 and above
- MySQL – 4.1.x through 5.1.x
- PHP – 5.0.x through 5.1.x (you must configure **php.ini** settings as per [Pre-installation Check List](#). Otherwise some of the features will not work.

To install vtiger CRM source

1. Download [vtigercrm-5.0.2.tar.gz](#) from the Sourceforge.net.
2. Extract the **vtigercrm-5.0.2.tar.gz** file into Apache root directory.

3. Start Web Browser and follow the procedure given in the "[Configuring vtiger CRM Server](#)" chapter for completing vtiger CRM installation.

Pre-installation Check List

1. You must have READ/WRITE permissions on the following vtiger CRM folders:

- PHP Configuration - config.inc.php
- Cache Directory - cache/
- Mail Merge Template Directory -test/wordtemplatedownload/
- Uploads Directory - storage/
- Install Directory - install/
- Installation file -install.php
- Product Image Directory -test/product/
- User Image Directory - test/user/
- Contact Image Directory- test/contact/
- Logo Directory- test/logo/
- Email Templates Directory -modules/Emails/templates/
- User Privileges - user_privileges/
- Smarty Compile Directory - Smarty/templates_c
- Tabdata File Permission - tabdata.php
- ParentTabdata File Permission - parent_tabdata.php
- Smarty Cache Directory - Smarty/cache

In Linux shell use the following command:

```
#chmod 777 <folder/file name>
```

Pre-installation Check List

2. Your php.ini must be configured with the following parameters:

- safe_mode = **Off**
- display_errors = **On**
- file_uploads = **On**
- register_globals = **Off**
- max_execution_time = **600**
- output_buffering = **On**
- memory_limit = **32M**
- error_reporting = **E_WARNING & ~E_NOTICE**
- allow_call_time_reference = **On**
- log_errors = **Off**
- short_open_tag = **On**
- extension = **php_gd2.dll**
- extension = **php_imap.dll**
- extension = **php_mysql.dll**
- extension = **php_mysqli.dll**

6. Starting & Stopping vtiger CRM

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

```
#sh startvtiger.sh
```

- To stop 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 **vtigercrm-5.0.2-source.tar.gz**. Hence you have to start MySQL and Apache in your LAMP environment manually and then configure vtiger CRM server.

7. Upgrading to 5.0.2


We strongly recommend users to migrate from the vtiger CRM previous version to the latest version vtiger CRM 5.0.2. Currently we are providing UI based data migration for the following versions

- V 4.2.x → V 5.0.2
- V 5.0.0 → V 5.0.2
- V 5.0.1 → V 5.0.2

Warning: Please don't forget to take the source code backup before extracting the patch; otherwise all your custom code will be overwritten by the new code.

To upgrade to version 5.0.2

1. Download the [vtiger CRM 5 - Patch 2](#) patch from Sourceforge.net
2. Extract the **vtiger_CRM_5.0.0_Patch_2.zip** to <vtiger CRM Home> directory
3. Now, open the vtiger CRM in Web browser and login as a Admin user
4. Click the **Settings → Other Settings → Migration Wizard** link.
5. In the *Migration Wizard*, follow the steps given the wizard.



Upgrade vtiger CRM Database

(Upgrade database from vtiger CRM 4.2.3 to 5.0.0)

Step 1 : Select Source

To Start database migration, you must specify the format in which the old data is available

- I have access to vtiger CRM live database system**
Note: This option requires you to have the host machine's (where the DB is stored) address and DB access details. Both local and remote systems are supported in this method. Refer documentation for Help.
- I have access to vtiger CRM archived database dump**
Note: This option requires database dump available locally in the same machine in which you are upgrading. You cannot access data dump from a different machine (remote database server). Refer documentation for Help.
- I have a new database with 4.2.3 Data**
Note: This option requires vtiger CRM 4.2.3 database system details, including database server ID, user name, and password. You cannot access data dump from a different machine (remote database server).

8. Configuring vtiger CRM Server

After installing vtiger CRM, you must configure vtiger CRM server further with database, Website, currency, and administration access details. The vtiger CRM database tables and demo data are populated during configuration, which will take about 5 minutes time.

To configure vtiger CRM server

1. Start Web browser and enter `http://<host-name>/vtigerCRM/index.php` in location bar.
2. In the *Registration* page, complete the product registration (optional). Click the **Start** button.
3. In the *System Check* page, PHP, MySQL database, files/directories that have read/write permissions, and GD graphics library version status are displayed. If the all the parameters are OK, 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 *System Configuration* page, enter the appropriate values for Database, Site Configuration, and Administration sections. Afterwards click the **Next** button.

Database Configuration

- **Host Name (mandatory)** – By default, Host Name is set as `<System Name>: <Port No>`. Please do not change the port number as it is added during installation.
- **User Name (mandatory)**– Specify username for accessing the database.
- **Password**– Specify password for the username.
- **Database Name (mandatory)**– By default database name is `vtigercrm5`. You can also create a database as per your requirements.
- **Root User Name (mandatory)**– If you have selected the create data option in Database Name field, specify root user name for creating database.

- **Root Password**– Specify password for the root username.

Site Configuration

- **URL (*mandatory*)** – Enter the host name. By default, it is `http://<system name>`.
- **Path (*mandatory*)** – By default, this is the path where vtiger CRM is installed.
- **Path to Cache Directory (*must have write permission*)** - By default, this is `cache/`. This folder is used to store the files, such as attachments, and import/export- related files temporarily.

Admin Configuration

- **User name** – 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 vtiger CRM.
- **Email ID** – By default email ID is `admin@your-domain.com`. You can also change the administrator’s e-mail ID.

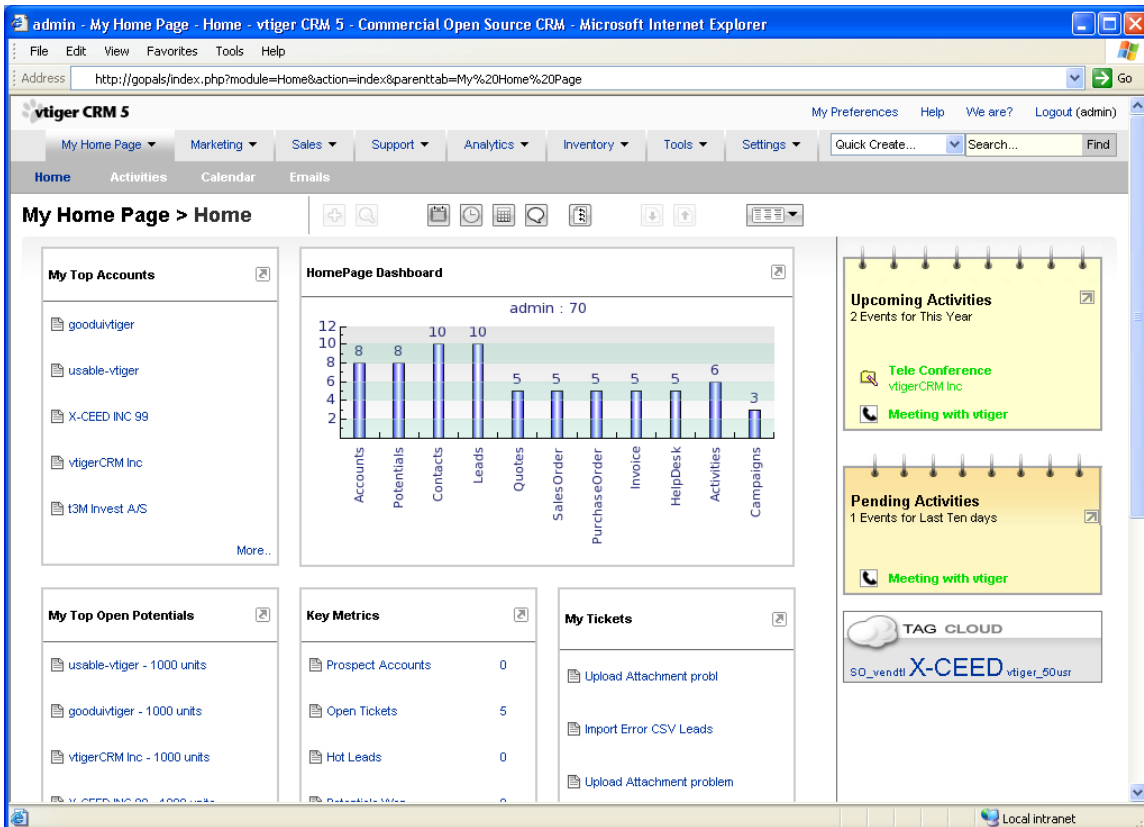
Currency Configuration

- **Name (*mandatory*)** – Specify your fiscal currency name (For example, Dollar).
- **Symbol (*mandatory*)** – Specify your currency symbol (For example, \$).
- **Code (*mandatory*)** – Specify international code of your currency (For example, USD).

5. In the *Confirm Settings* page, review the configuration information. If you want to change some of the details, click the **Change** button and go to previous step. If you want to populate some data, select the **Also populate demo data?** check box. Once you are ready click the **Next** button.
6. In the *Config File Creation* page, click the **Next** button. It will take approximately 4 minutes to complete the configuration.
7. In the *Create Database Tables* page, click the **Finish** button to complete the vtiger CRM configuration.

Once installation is completed successfully, installation directory will be locked to secure your installation against unauthorized access.

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 have logged in successfully, you can view the vtiger CRM Home page as shown below:



9. Configuring Notification Scheduler

You can schedule the notifications, such Big deals, pending tasks, event reminder, support start and end dates, 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. 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
```

Please refer to: [vtiger Knowledge Base](#) for troubleshooting tips. If your problem is not yet solved, please feel free to post in [vtiger Discussions](#).

11. 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.

12. Related Documents

You can refer to the following documents to work with other vtiger CRM Add-ons:

- [vtiger Outlook Plug-in User Manual](#)
- [vtiger Office Plug-in User Manual](#)
- [vtiger Thunderbird Extension User Manual](#)
- [vtiger Customer Portal User Manual](#)
- [vtiger Web Forms User Manual](#)
- [vtiger Firefox Toolbar User Manual](#)

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.

13. 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.

Contact Information:

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Public Support: <http://discussions.vtiger.com>