



## Installing QuinataCRM

QuinataCRM can be installed either as a stand-alone program for a single user or on a network capable of supporting many users. How many people can use the system at any one time will depend on the type of licence that you have purchased.

### Installing a single user system

#### Requirements

A single user QuinataCRM system can be installed on a Windows desktop or lap top PC with the following minimum requirements:

*Windows 7*  
*Windows 7 - 64 bit*  
*Windows 8*  
*Windows 8.1*  
*Windows 8.1 – 64 bit*  
*Windows 10*  
*Windows 10 – 64 bit*

QuinataCRM cannot be installed in a compressed folder.

Some features require that Microsoft Office is installed. Compatible versions of Office are:

*Office 2003*  
*Office 2007*  
*Office 2010 – 32 bit or 64 bit*  
*Office 2013 – 32 bit or 64 bit*  
*Office 2016 – 32 bit or 64 bit*

Note that if the system is to be installed on a 64 bit version of Windows with a 64 bit version of Office 2010, Office 2013 or Office 2016 then Office **must** be installed **before** QuinataCRM is installed. If you install Office after QuinataCRM you should re-install the Workstation portion of QuinataCRM, following the instructions in the Workstation section for the multi-user version (DO NOT REINSTALL THE COMPLETE SYSTEM – THIS WILL DELETE ALL YOUR DATA).

The scanning function is not available if QuinataCRM is installed on a PC with a 64 bit version of Office.

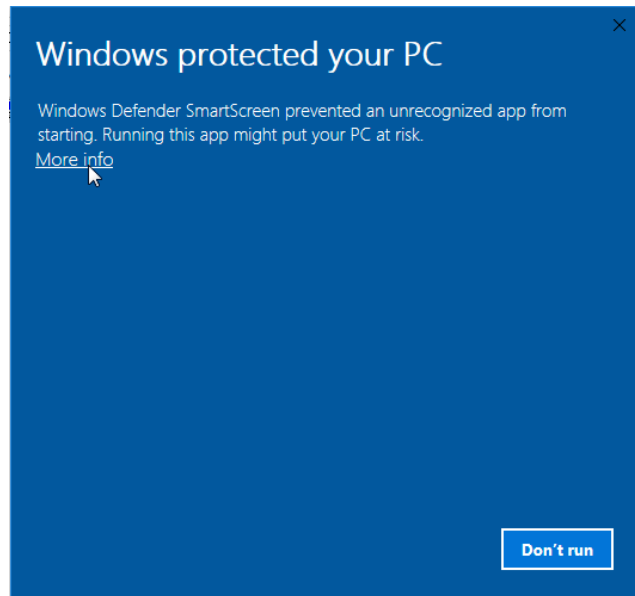
#### Installation

Log in to your PC using a user name which gives you administration rights.

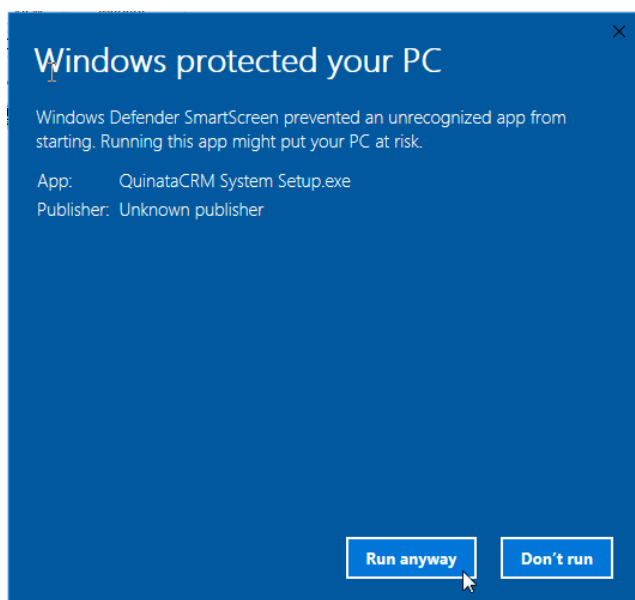
If the computer is joined to a domain the domain controller must be accessible to the server whilst the installation is performed.

Place the installation file **QuinataCRM Setup** in a folder on your PC and double click the installation icon or run the installation program from the website or installation CD.

If you have downloaded the installation file then if you are installing on Windows 10 you may see a warning message:

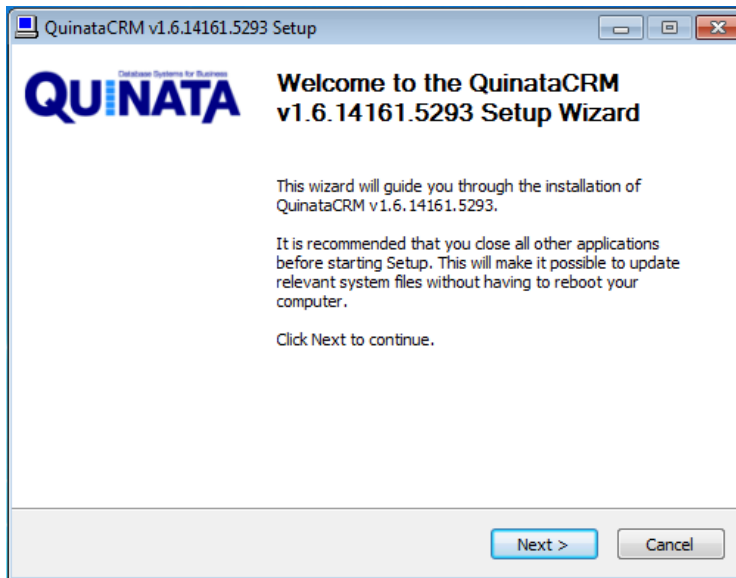


Click on More Info and another message will open:

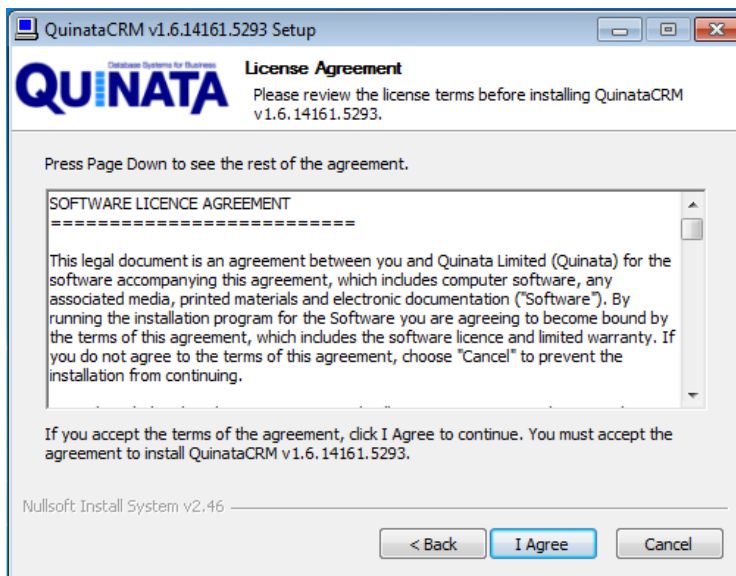


Click "Run anyway".

The installation program will then open. If you are installing on a Windows 7, Windows 8, Windows 8.1 or Windows 10 system and User Account Control is enabled you will be asked to confirm that you wish to run Quinata CRM Setup. Click OK to continue and then click Next to start the installation.



Check that you agree with the licence terms displayed.

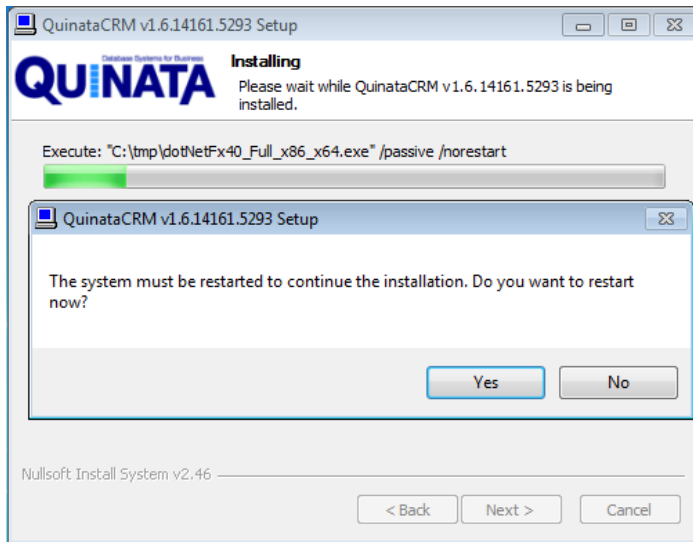


If you agree click I Agree.

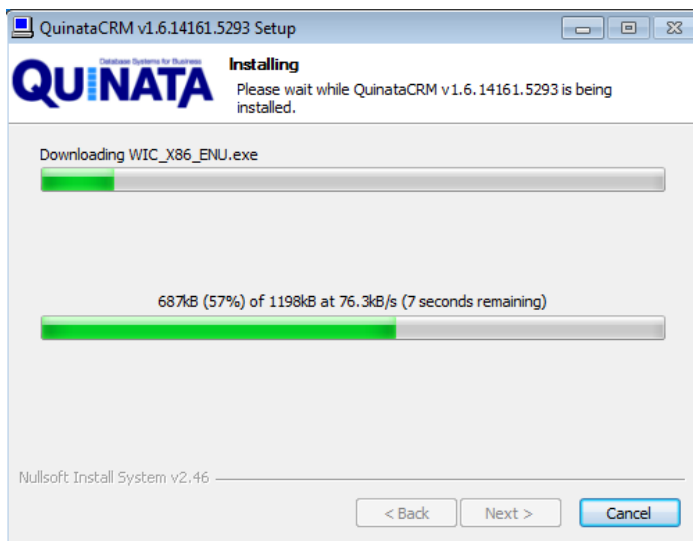
The installation will then proceed. It may be necessary to install a number of Microsoft packages. This is done automatically if required, but can take up to 45 minutes. You can continue to use the computer for other tasks during this time, although other programs may run more slowly than normal.

Depending on the configuration of Windows on your computer it may be necessary to restart the system before the installation can be completed. If this is the case the installer will ask whether you want to restart straightaway.

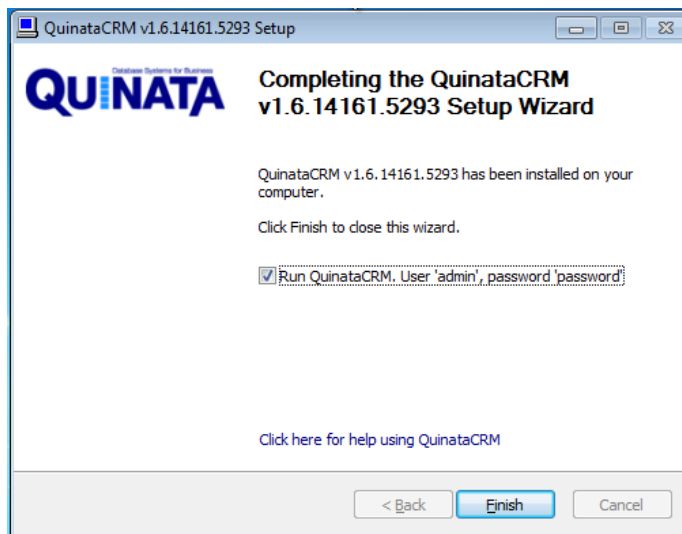
If you answer Yes the system will restart and the installation will then be completed.



If you choose No the installation will continue after you restart the system.



When the installation completes click Finish. If the box Run QuinataCRM is checked QuinataCRM Express will start automatically when the installation finishes.

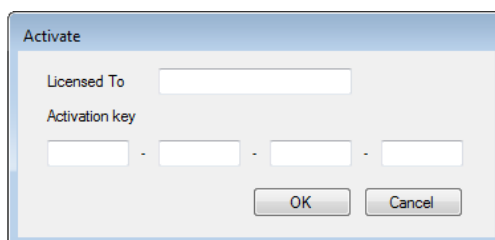


QuinataCRM is now ready to use. If you have not chosen to start the system automatically at the end of the installation start it using the icon on the desk top or the start menu.



The first time you run QuinatCRM you may be asked to enter the name to which the system should be licensed and an activation key. The key will be found on the CD case or will have been emailed to you.

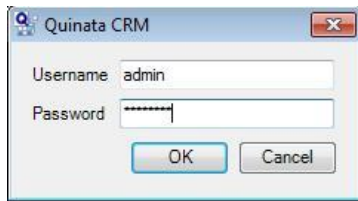
You will not be asked to enter an activation key if you are installing a trial version of the system.



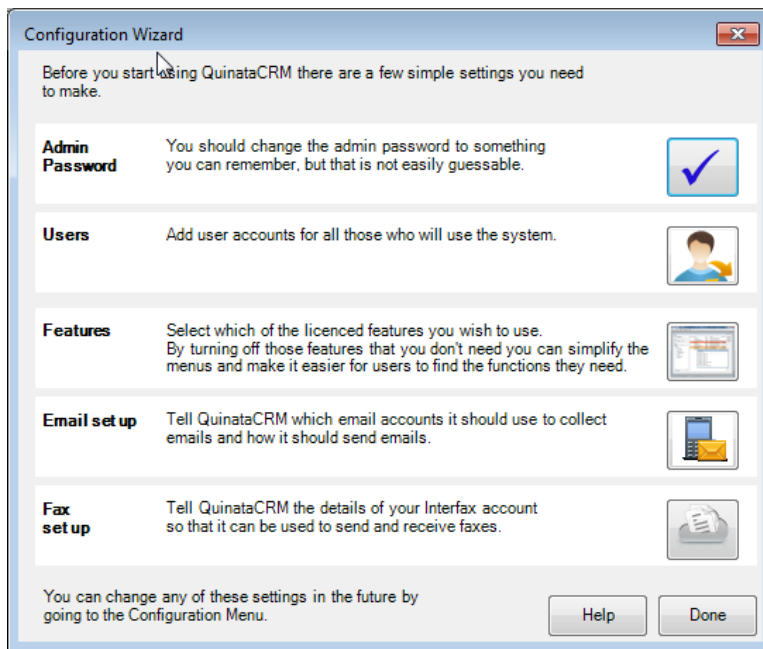
Enter the licensed to name and the activation key and click OK to activate your licence. The computer must be connected to the internet to activate the licence. If you are unable to activate the licence immediately you can click cancel and use the system for up to five days after which you must activate the licence.

If you are unable to activate the licence please contact Quinata Limited with your activation key and the IDS value display on the About form.

You can log in using the user name *admin* and the password *password*.



The first time you log in you need to enter some information to set up the system. The configuration wizard will help you do this.



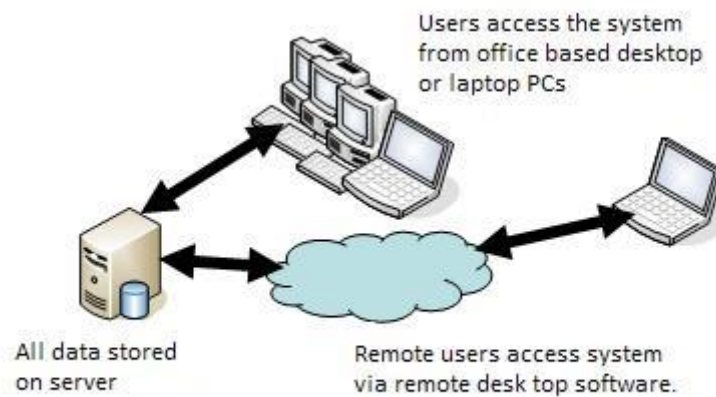
The Configuration Wizard will allow you to:

- Select which features you want to use.
- Add one or more user names of your choice that you will use on a day to day basis.
- Configure the system to allow emails to be sent and collected.
- Configure the system to allow faxes to be sent and collected.
- Change the admin password to something you can remember, but that is not easily guessable.

See Getting Started in the on screen help for details of how to do this.

## Installing a multi-user system

When a multi-user system is required the QuinataCRM database is installed on one computer and this is then accessed from as many other computers as required (provided that the number of users at any one time does not exceed the number of users your licence is for).



If you have a server the database should be installed on your server. If you do not have a server the database can be installed on another PC, but this PC must always be on when the QuinataCRM system is in use.

### Requirements

The system can be installed on computers that are part of a Workgroup or part of a Domain.

#### a) Server

QuinataCRM is supported on the following server operating systems:

- Windows 7*
- Windows 7 - 64 bit*
- Windows 8*
- Windows 8.1*
- Windows 8.1 – 64 bit*
- Windows 10*
- Windows 10 – 64 bit*
- Windows 2003 Server*
- Windows 2003 Small Business Server*
- Windows 2008 Server*
- Windows 2008 Release 2 Server*
- Windows 2008 Small Business Server*
- Windows 2008 Release 2 Small Business Server*
- Windows 2012 Server*
- Windows 2012 Release 2 Server*

The server needs to be accessible to users on all the workstations that will be used to access the QuinataCRM system. The QuinataCRM database cannot be installed in a compressed folder.

**b) User workstation PCs**

The workstation operating system must be one of:

*Windows 7*  
*Windows 7 - 64 bit*  
*Windows 8*  
*Windows 8.1*  
*Windows 8.1 – 64 bit*  
*Windows 10*  
*Windows 10 – 64 bit*

Some features require that Microsoft Office is installed. Compatible versions of Office are:

*Office 2003*  
*Office 2007*  
*Office 2010 – 32 bit or 64 bit*  
*Office 2013 – 32 bit or 64 bit*  
*Office 2016 – 32 bit or 64 bit*

Note that if the system is to be installed on a 64 bit version of Windows with a 64 bit version of Office 2010, Office 2013 or Office 2016 then Office **must** be installed **before** QuinataCRM is installed. If you install Office after QuinataCRM you should re-install the Workstation portion of QuinataCRM for the workstation(s) affected, following the instructions in the Workstation installation section.

The scanning function is not available on a workstation PC with a 64 bit version of Office 2010 or Office 2013.

**Server Installation**

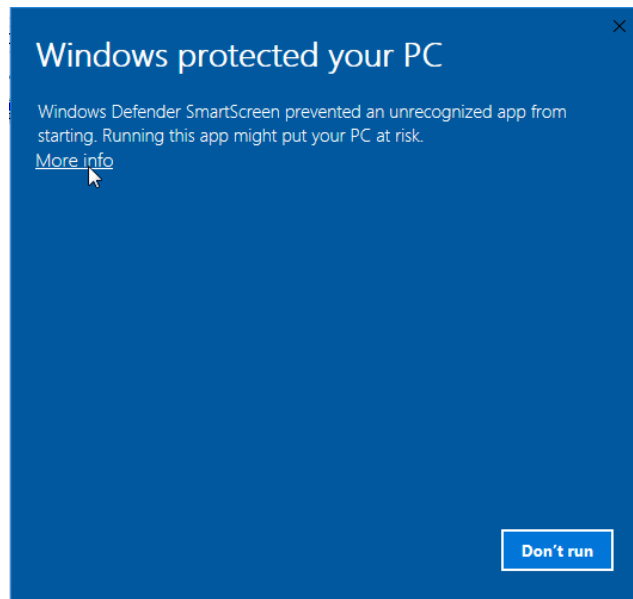
Log in to your PC or server where the database is to be installed using a user name which gives you administration rights on that PC or server. If the server is part of a domain the domain controller must be accessible to the server whilst the installation is performed.

Note that, depending on the Windows configuration, it may be necessary to restart the server during the installation.

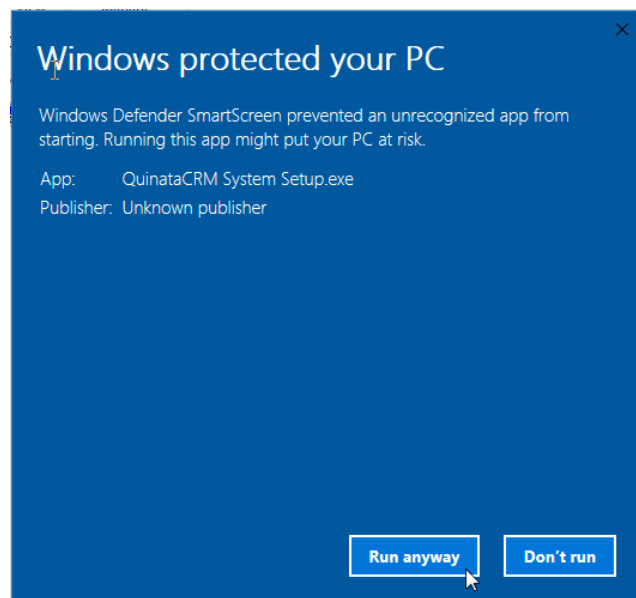
Place the installation file **QuinataCRM Setup** in a folder on your server and double click the installation icon or run the installation program from the website or installation CD.

If you have downloaded the installation file then if you are installing on Windows 10 you may see a warning message:



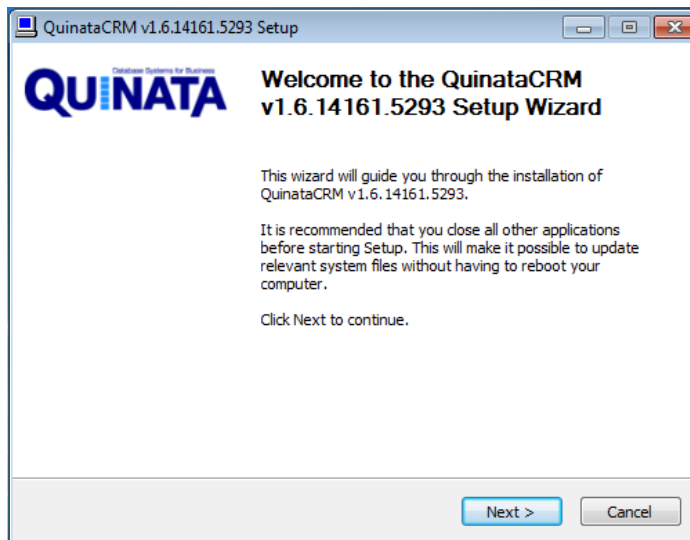


Click on More Info and another message will open:



Click "Run anyway".

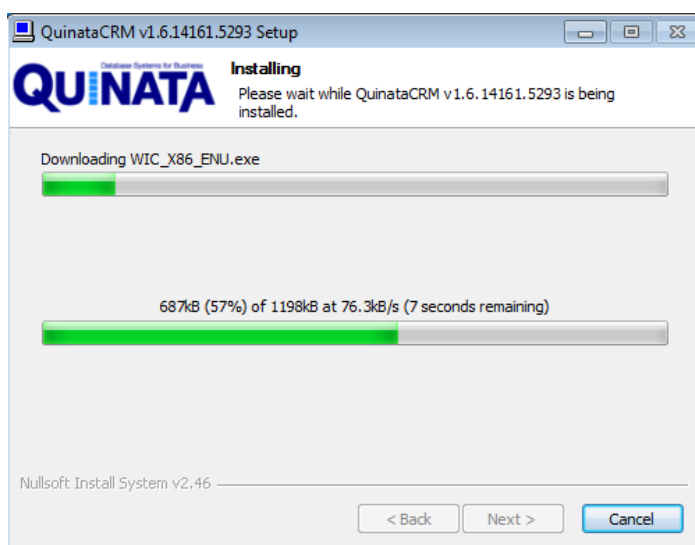
The installation program will then open. If you are installing on a Windows 7, Windows 8, Windows 8.1, Windows 10, Windows 2008 Server or Windows 2012 Server system and User Account Control is enabled you will be asked to confirm that you wish to run QuinataCRM Setup. Click OK to continue and then click Next to start the installation.



Check that you agree with the licence terms displayed.

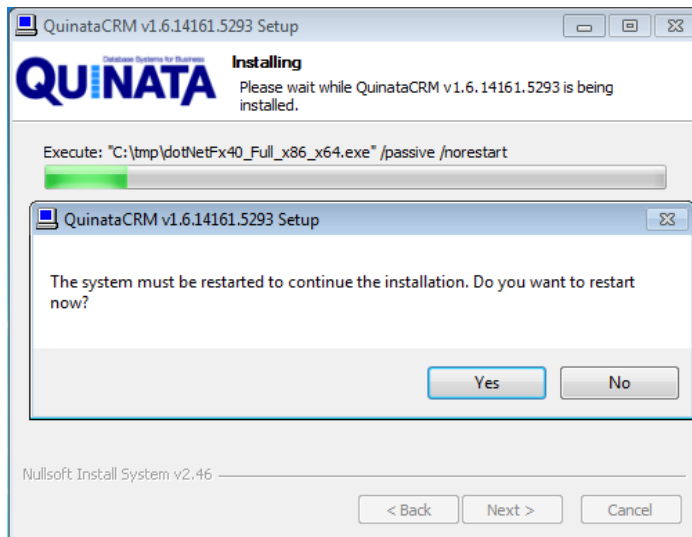


If you agree, click I Agree and the installation will then proceed automatically.



Depending on the status of your server it may be necessary to install a number of Microsoft packages. This is done automatically if required, but can take up to 45 minutes.

Depending on the configuration of Windows on your server it may be necessary to restart the server before the installation can be completed. If this is the case the installer will ask whether you want to restart straightaway.



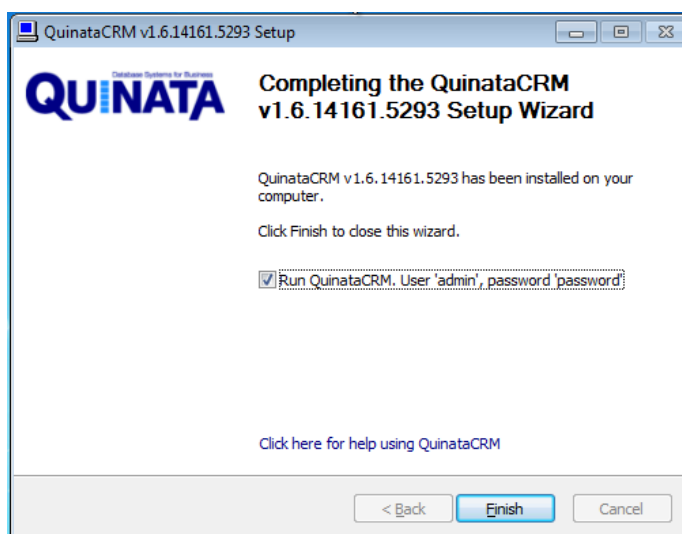
If you answer Yes the server will restart and the installation will then be completed.

If you choose No the installation will continue after you restart the server.

When the installation completes click Finish.

If you are installing on Windows 7, 8 or 10 the workstation software will be installed automatically. In this case if the box Run QuinataCRM is checked QuinataCRM will start automatically when the installation finishes.

If you are installing on a Windows Server computer you will need to install the workstation software manually on at least one workstation used with QuinataCRM.



The installation creates a shared folder on the server called QuinataCRM, to which all users of the system must have access.

For details of how to do this with different network configurations see **Configuring Shared Folders** below.

## Workstation Installation

The software will need to be installed on each of the workstation computers that will be used to access the QuinataCRM system.

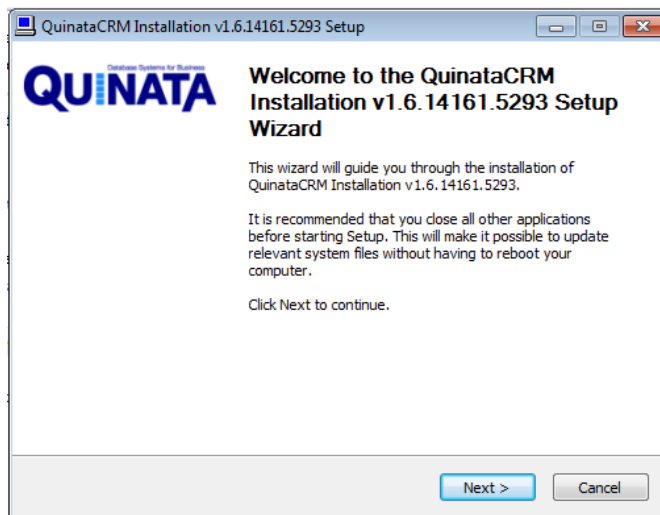
Perform the following operations on each workstation:

Log in to the PC using a user name which gives you administration rights on that PC.

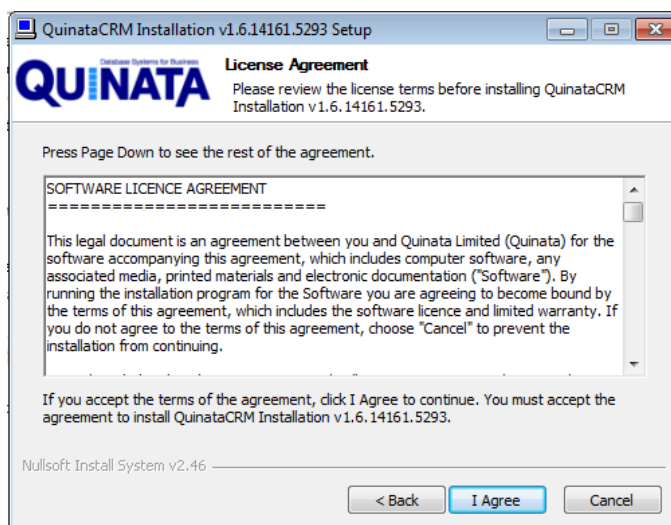
Locate the folder QuinataCRM on the server .

Run the program QuinataCRM Workstation Setup from this folder.

The workstation installation program will then open. If you are installing on a Windows 7, Windows 8, Windows 8.1 or Windows 10 system and User Account Control is enabled you will be asked to confirm that you wish to run Quinata CRM Setup. Click OK to continue and then click Next to start the installation.

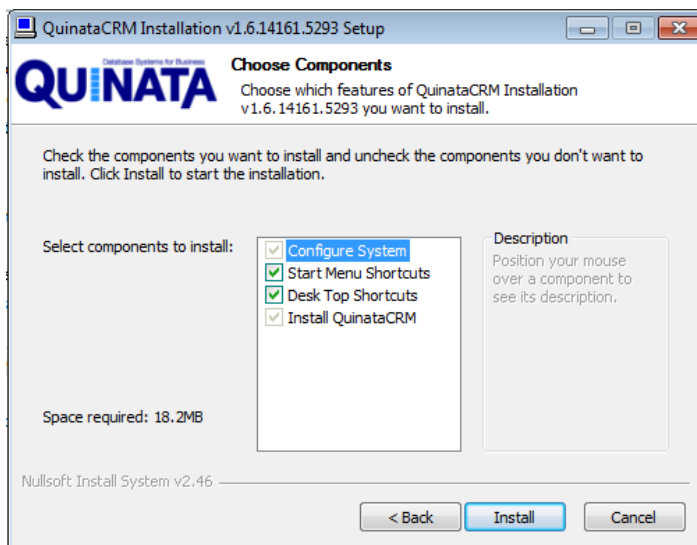


Check that you agree with the licence terms displayed.

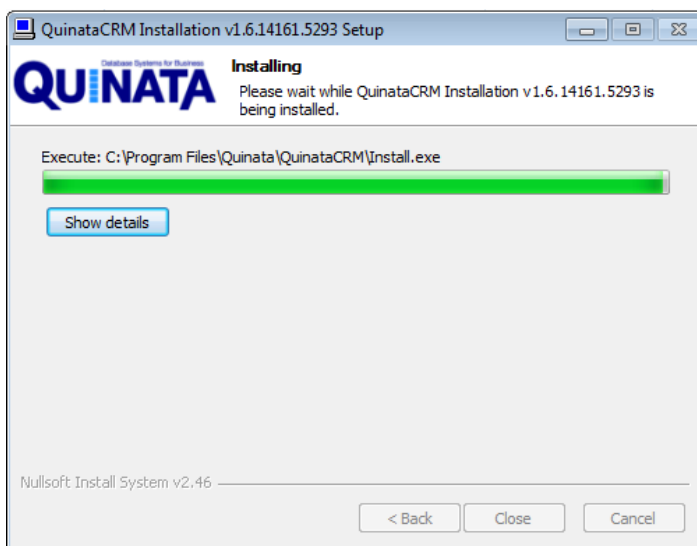


If you agree click I Agree .

Click Install to start the installation.



The installation will then proceed automatically.

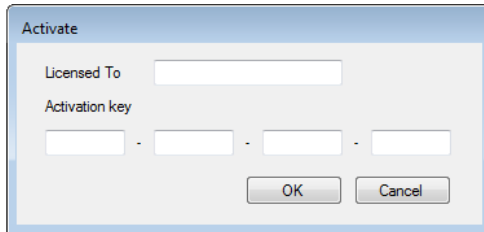


QuinataCRM is now ready to use. Start it using the icon on the desk top or the start menu.



The first time you run the QuinatCRM workstation on you may be asked to enter the name to which the system should be licensed and an activation key. The key will be found on the CD case or will have been emailed to you.

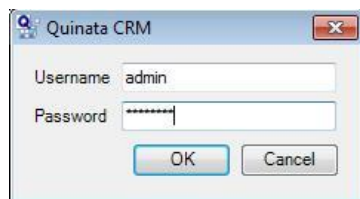
You will not be asked to enter an activation key if you are installing a trial version of the system.



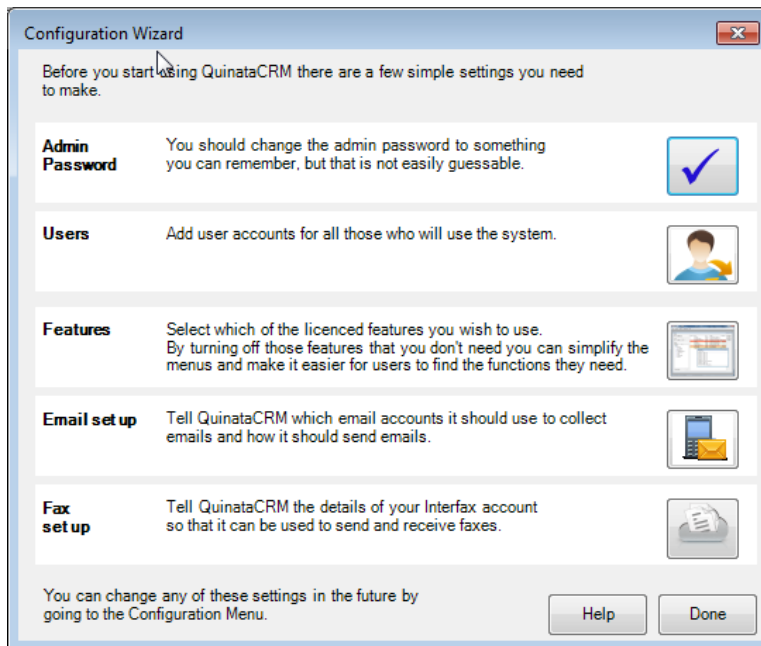
Enter the licensed to name and the activation key and click OK to activate your licence. The computer must be connected to the internet to activate the licence. If you are unable to activate the licence immediately you can click cancel and use the system for up to five days after which you must activate the licence.

If you are unable to activate the licence please contact Quinata Limited with your activate key and the IDS value display on the About form.

You can log in using the user name *admin* and the password *password*.



The first time you log in you need to enter some information to set up the system. The configuration wizard will help you do this.



The Configuration Wizard will allow you to:

- Select which features you want to use.
- Add one or more user names of your choice that you will use on a day to day basis.
- Configure the system to allow emails to be sent and collected.
- Configure the system to allow faxes to be sent and collected.
- Change the admin password to something you can remember, but that is not easily guessable.

See Getting Started in the on screen help for details of how to do this.



## Shared Folders

If you are installing a multi-user system QuinataCRM requires a shared folder on the server that is accessible by all users from their workstations. In some cases this can be set up automatically when QuinataCRM is installed but some configurations of Windows do not allow this and manual set up is required.

## Domains

If the server and all the workstations are part of a domain the shared folder set up should be complete when the installation completes. If QuinataCRM reports that it is unable to open the document folder when opening a contact's data you will need to create a *QuinataCRMUsers* group, give this group full access to the QuinataCRM folder and add all QuinataCRM users to this group.

Normally the QuinataCRM folder will be in *C:\Users\Public\Public Documents*.

## Workgroups

If the computers that will be used to access QuinataCRM are part of a Workgroup (rather than a Domain) you may need to take some further steps. These will depend on the version of Windows that the server is using.

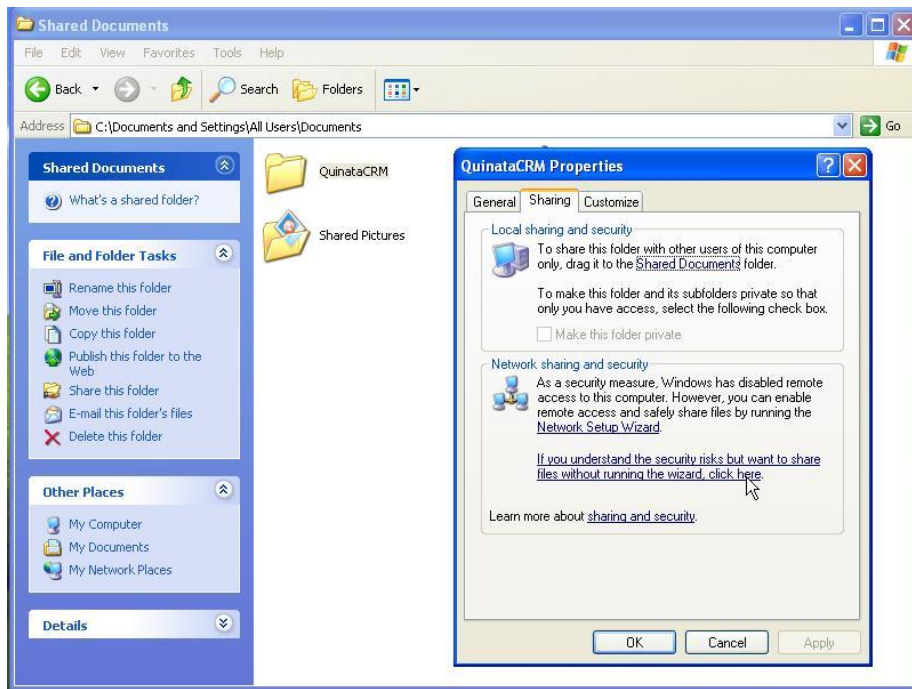
If you have a Windows 2003 Server, Windows 2008 Server, Windows 2008 Release 2 Server, Windows 2012 Server or Windows 2012 Release 2 Server, with workstations that are not part of a domain you will need to provide access to the QuinataCRM shared folders by defining users on your server with the same user names and passwords as exist on your user workstations.

If you are using a Windows XP, Windows 7, Windows 8, Windows 8.1 or Windows 10 computer as a server you should follow the instructions below.

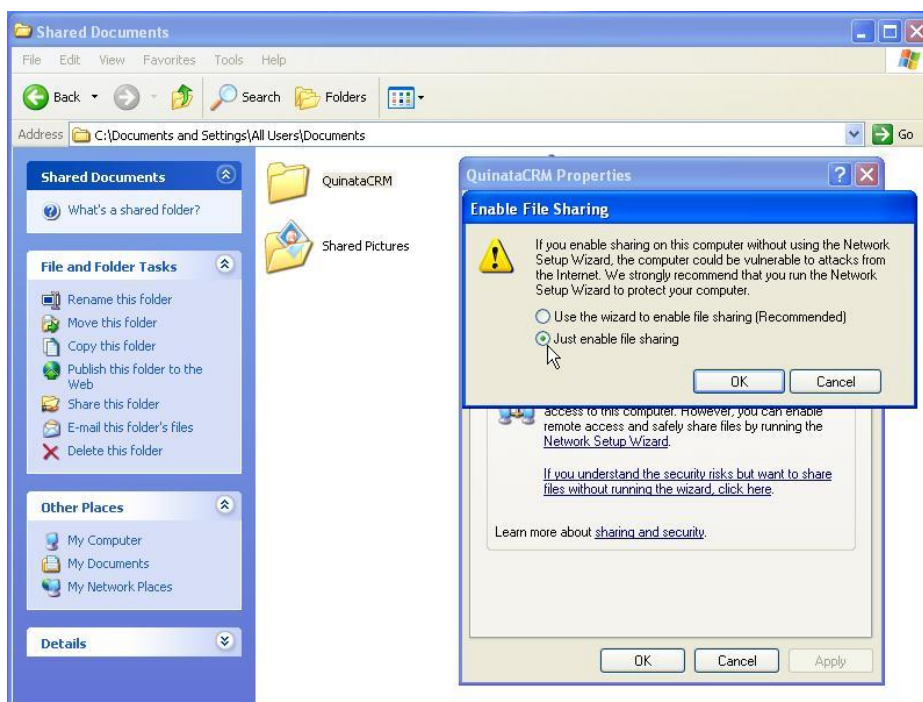
### a) Windows XP

If the server software has been installed on a Windows XP system you should carry out the following steps:

- Go to *c:\Documents and Settings\All Users\Documents*.
- Right click on the folder QuinataCRM and choose Properties
- Select the Sharing Tab
- Click on *If you understand the security risks but want to share files without running the wizard click here*.



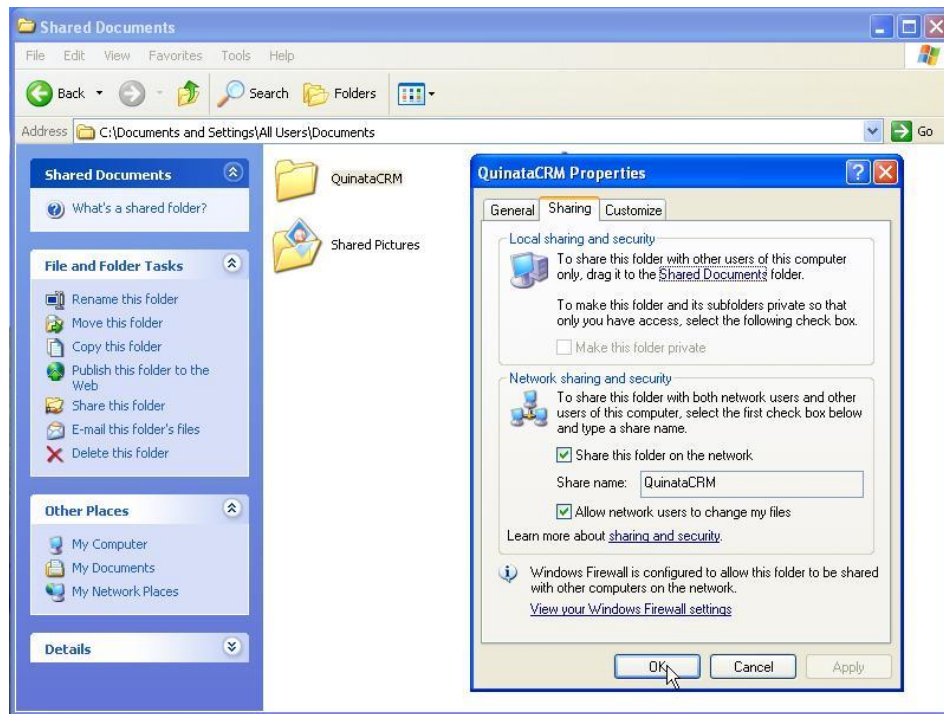
Click on Just enable file sharing and click OK.



Check Allow network users to change my files.

Click OK.

Close the Shared Documents window.



Note that this will provide any user on your network with access to the shared folders on your server. If you are using Windows XP Professional and you do not want this to happen you should not take these steps but create users on the server computer with the same user name and password as on your workstation computers.

For more details go to the Microsoft XP Professional Product Documentation at [http://www.microsoft.com/resources/documentation/windows/xp/all/proddocs/en-us/sharing\\_files\\_overvieww.mspx?mfr=true](http://www.microsoft.com/resources/documentation/windows/xp/all/proddocs/en-us/sharing_files_overvieww.mspx?mfr=true)

**b) Windows 7 Windows 8, Windows 8.1 and Windows 10**

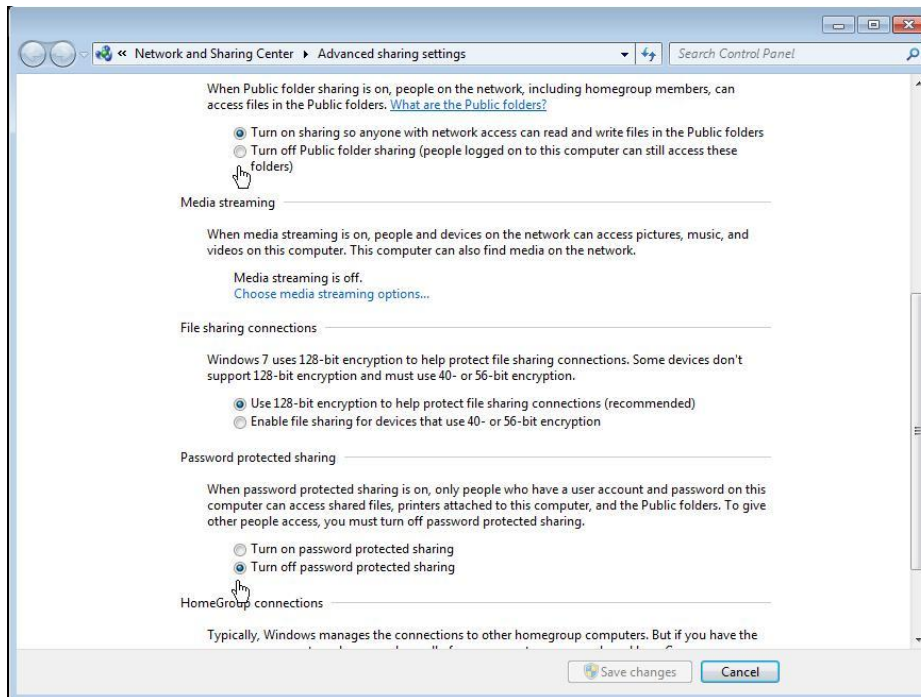
If the server is installed on a Windows 7, Windows 8, Windows 8.1 or Windows 10 system you should:

1. Open the Network and Sharing Centre (open the Control Panel, choose Network and Internet and then Network and Sharing Centre).



Choose Advanced Sharing Settings from the menu on the left and then:

- Open the “All Networks” section
- Under **Public folder sharing** select “Turn on sharing so anyone with network access can read and write files in the Public Folders.”
- Under **Password protected sharing** select “Turn off password protected sharing”
- Click Save changes



Now close the Network and Sharing Centre.

Note that this will provide any user on your network with access to the shared folders on your server. If you do not want this to happen you should not take these steps but create users on the server computer with the same user name and password as on your workstation computers.

For more details see the Microsoft document <http://windows.microsoft.com/en-US/windows7/Share-files-with-someone>.