



## INSTALLING AND UPDATING RHWFEEngine

This article will walk you thru the process of installing the RHWFEEngine: the RedHorse CRM Workflow Engine. It will also walk you thru the process of updating an existing installation.

### Prerequisites

RHWFEEngine is compatible with the Standard and Real Estate version of RedHorse CRM version 3.2 and higher only. If you are using the Express version of RedHorse CRM, you must upgrade before you may use RHWFEEngine.

### Choosing an Installation Location

RHWFEEngine is a Windows Service. It can be run on any Windows workstation (XP Pro or higher) or server operating system (Server 2003 or higher) given the correct permissions to run.

It is not necessary to have RedHorse CRM running on the machine where RHWFEEngine is installed. It is only necessary to have access to the path (local physical drive or network) where RedHorse CRM is installed.

RHWFEEngine can be installed on the server where RedHorse CRM is installed, but if high volume is expected, better performance might be achieved by installing on a dedicated machine.

### Step 1: Run the Installer

Run the file wfsetup.exe file that is located in the RedHorse CRM folder. When running on a workstation operating system, it may be necessary to log into the machine as Administrator or select "Run as Administrator" to have proper permissions for installing a service.

During the installation, you must select the path to the network installation of RedHorse CRM. Do not specify a mapped drive, and do not select a new empty path to install RHWFEEngine.

### Step 2: Set Service Permissions

RHWFEEngine is initially set to log on as the Local System Account. If this account does not have sufficient permissions to start services, this must be changed before you can start the service. In Windows, go to Start, Administrative Tools, Services. Locate RHWFEEngine and double click to open the Properties window. Use the Logon tab to set the proper logon for the service.

### **Step 3: Start WFManager**

When RHWFEEngine is installed, a shortcut to WFManager.exe is put into the Startup folder in Windows. When logging into Windows, this tray application will start automatically. To run this application manually, it can be launched from the Start menu. It may be necessary to select to "Run as Administrator" when starting WFManager. This application must have sufficient permissions to start and stop services.

### **Step 4: Start the RHWFEEngine Service**

To start the RHWFEEngine service, choose Start when editing the service in Windows Services, or right click the tray application WFManager and choose Start.

### **Updating to a New Version of RHWFEEngine**

New versions of RHWFEEngine are distributed with updates to RedHorse CRM, though all updates to RedHorse CRM might not include a new version of wfsetup.exe. After installing an update to RedHorse CRM, a new version of wfsetup.exe may be found in the folder where RedHorse CRM is installed. Updating to a new version of RHWFEEngine follows the same process outlined above, where you will run the same wfsetup.exe that is used for a new installation. You will be reminded by the installer to exit the WFManager tray application prior to installing. You may restart this again manually after the installation completes.

Please contact support if you experience any issues during the installation process.

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