



USING THE SETTINGS TRANSFER TOOL FOR REDHORSE CRM

This article will help you in using the Settings Transfer tool for transferring settings from one RedHorse CRM database to another.

Settings Transfer Tool

It is possible to copy settings from one installation of RedHorse CRM to another by using the Settings Transfer Tool. This tool allows you to export settings from one installation into a zip file and then import those settings into a different installation of RedHorse CRM. This tool is generally used by resellers who have prepared an installation for a particular customer or vertical and want to apply those settings to a different customer.

Settings that may be Transferred

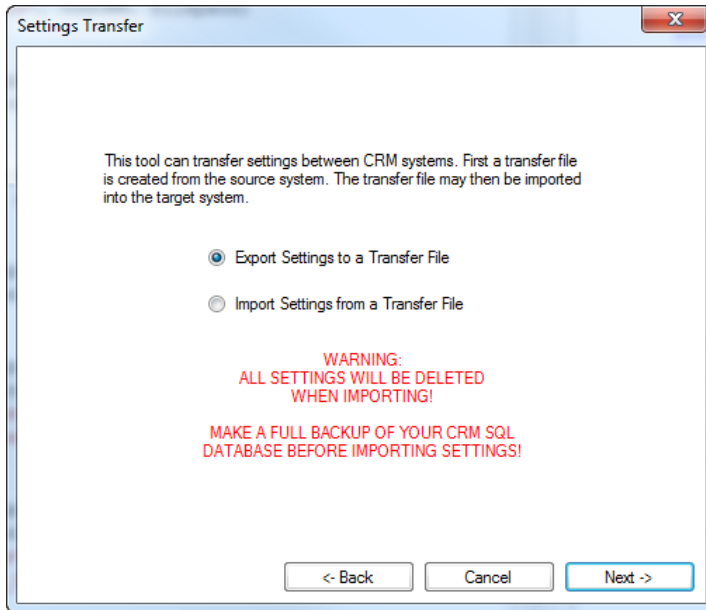
The following settings areas may be included in the transfer file:

Setting	RedHorse Tables
Activity Defaults	Cal_Defaults
Charts	Charts, Chart_Users
Custom Table Structure	Account_Custom, Contact_Custom, Product_Custom, Project_Custom, Quote_Custom, Ticket_Custom
Custom Toolbars	Toolbars, Toolbar_Users, Toolbar_Buttons
Custom Views	CustomViews
External Data Connections	ExternalData, External_Users
Holidays	Holidays
KB	KB
Labels	Labels
Lookups	Lookups, Lookup
Products	Products, Product_Kits, Product_Pricing, Product_Related, Product_Substitute
Publications	Publications

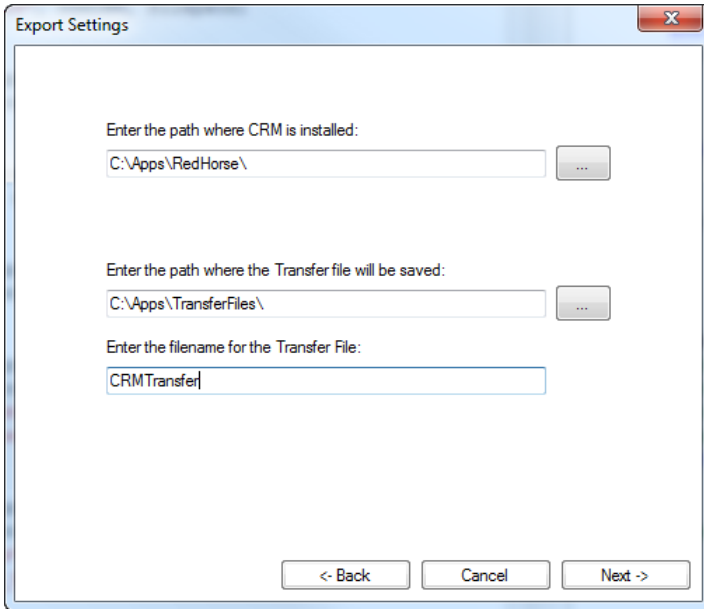
Queries	Queries
Settings	Settings
Setup	Setup
Surveys	Surveys, Survey_Questions, Survey_Answers
Users and Groups	Users, User_Groups, User_Group_Members
Workflow	Workflow, Workflow_Steps

Exporting Settings

Run SettingsTransfer.exe from the folder where RedHorse CRM is installed and select the option to Export Settings. Then click Next.

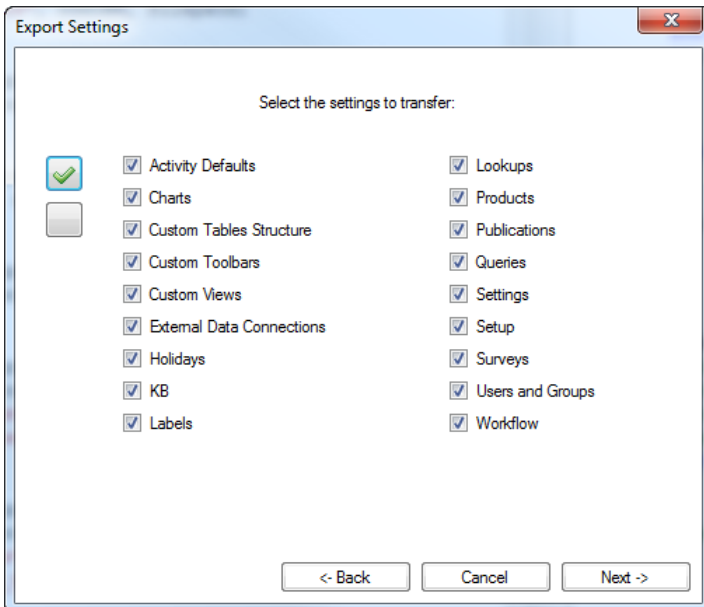


Enter the path of the RedHorse CRM installation from which settings will be exported. Then enter the path where the transfer file will be saved and a name for the file. You may add the suffix .zip or it can be added to the file name for you. Click Next.



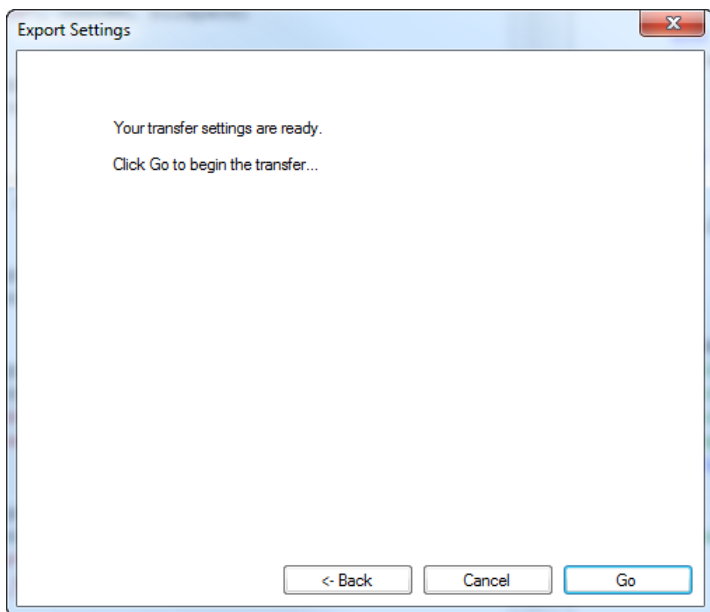
The 'Export Settings' dialog box contains three input fields. The first is labeled 'Enter the path where CRM is installed:' and contains the text 'C:\Apps\RedHorse\'. The second is labeled 'Enter the path where the Transfer file will be saved:' and contains 'C:\Apps\TransferFiles\'. The third is labeled 'Enter the filename for the Transfer File:' and contains 'CRMTransfer'. At the bottom are three buttons: '<- Back', 'Cancel', and 'Next ->'.

Select the settings areas to transfer. Use the Check All button to check all areas. Use the Uncheck All button to uncheck all areas. Click Next.

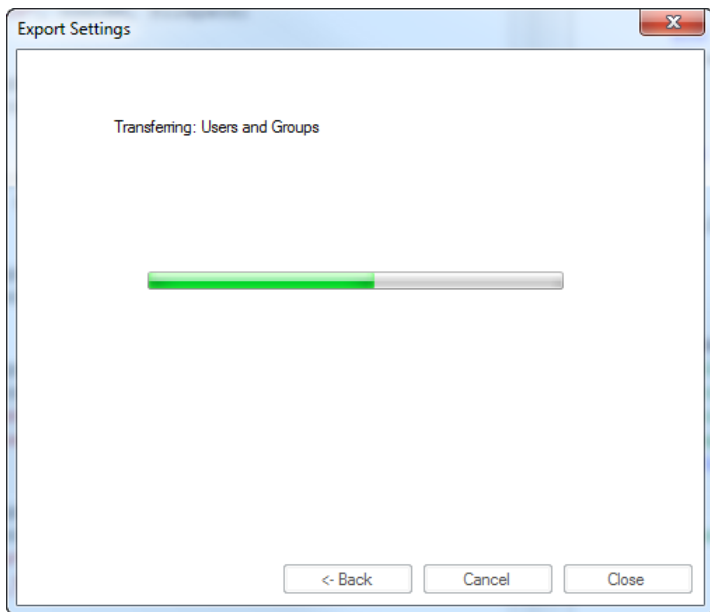


The 'Export Settings' dialog box shows a list of settings to transfer. On the left, there are two buttons: a 'Check All' button (with a green checkmark icon) and an 'Uncheck All' button (with a grey square icon). The list of settings includes: Activity Defaults, Charts, Custom Tables Structure, Custom Toolbars, Custom Views, External Data Connections, Holidays, KB, Labels, Lookups, Products, Publications, Queries, Settings, Setup, Surveys, Users and Groups, and Workflow. All items in the list have a checked checkbox. At the bottom are three buttons: '<- Back', 'Cancel', and 'Next ->'.

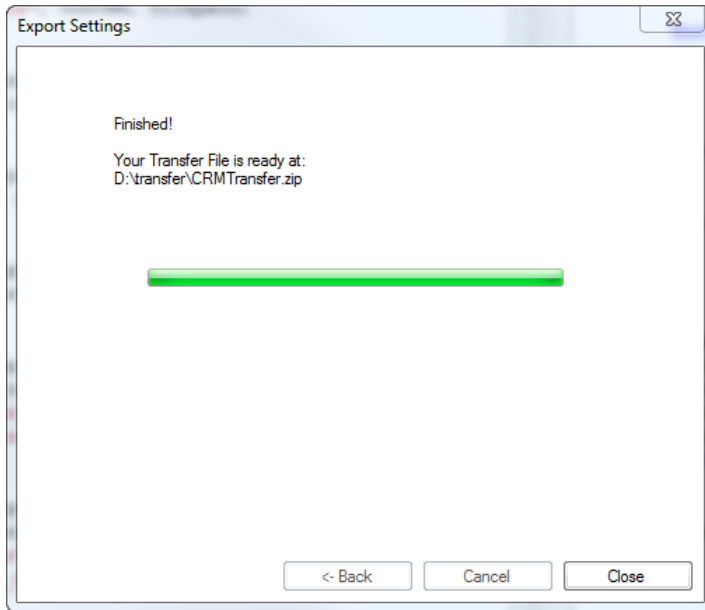
Click Go to begin the export.



You will see the progress update for each setting area included in the export.



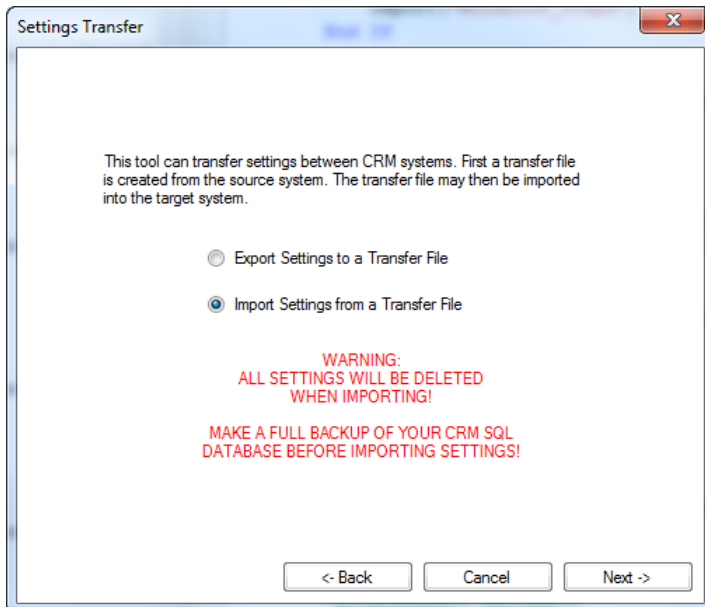
When the export is completed, click Finish.



The transfer zip file will be saved in the location you specified. It may now be taken to the server or location where the settings will be imported.

Importing Settings

Run SettingsTransfer.exe from the folder where RedHorse CRM is installed and select the option to Import Settings. Then click Next.



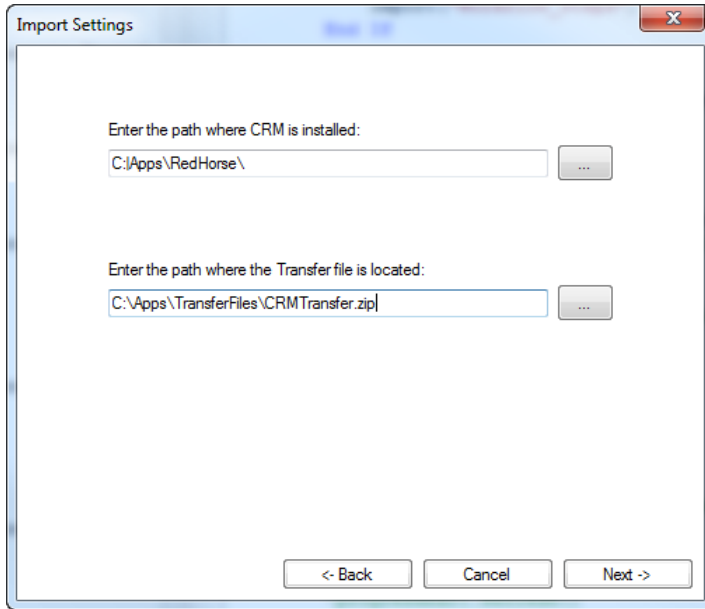
RedHorse Systems, Inc.

support@redhorsesystems.com

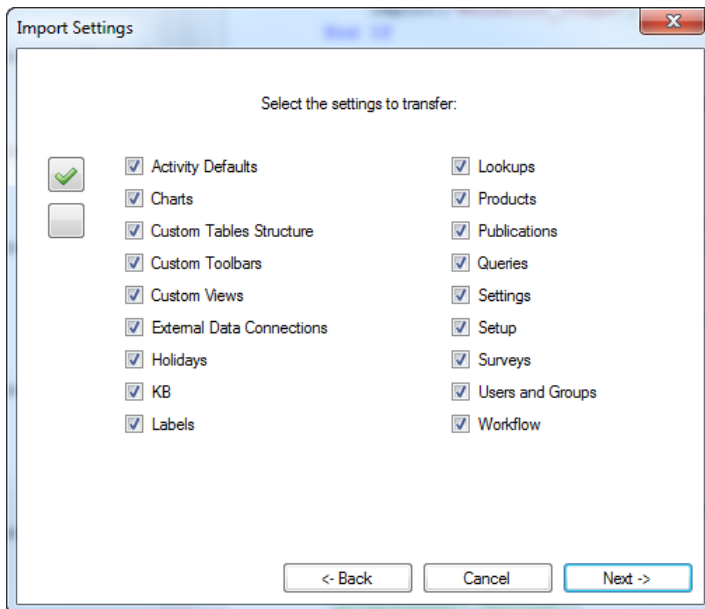
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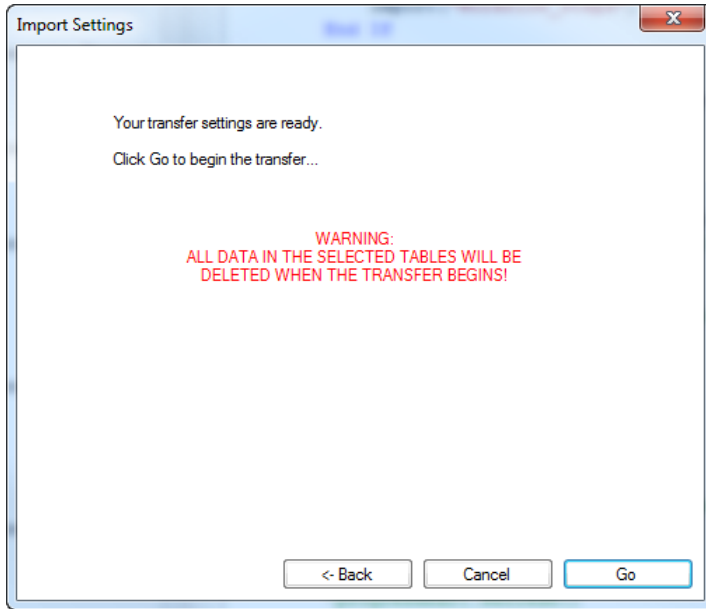
Enter the path to the RedHorse CRM installation where settings will be imported. Then browse to the Settings Transfer file containing the settings to be imported. Click Next.



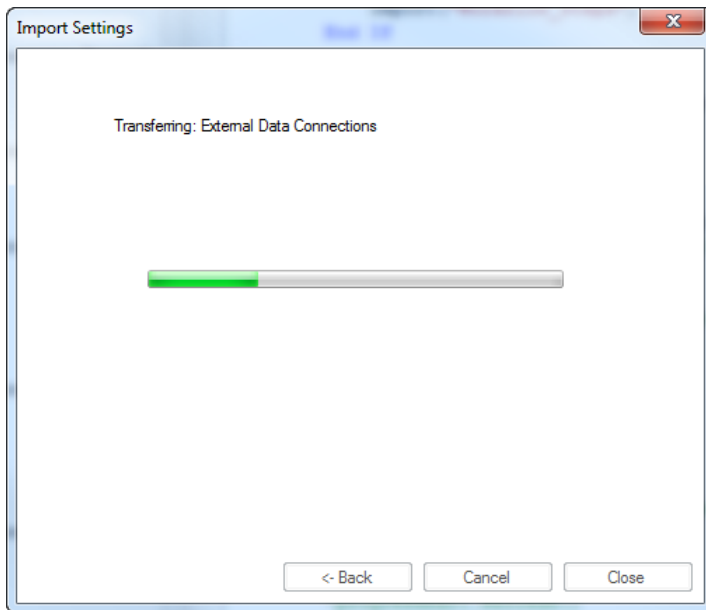
Select the settings areas to transfer. Use the Check All button to check all areas. Use the Uncheck All button to uncheck all areas. Click Next.



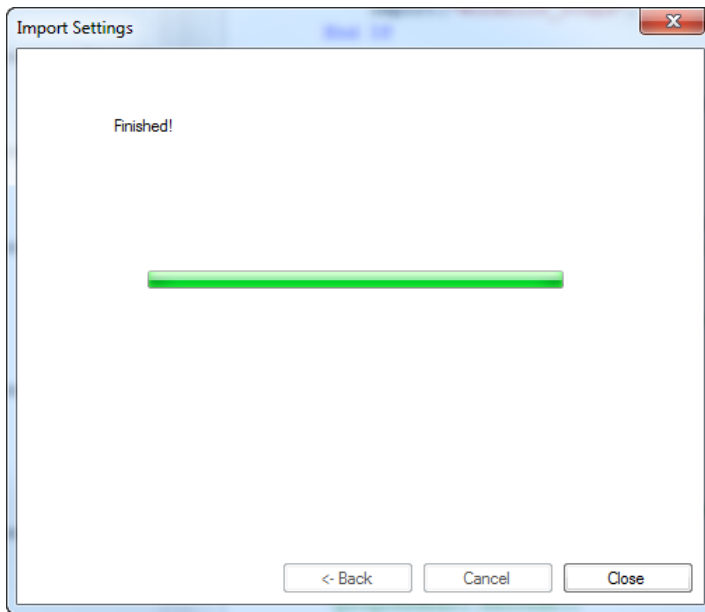
Note the warning that data in the selected tables will be deleted when the transfer begins. Click Go to begin the import.



You will see the progress update for each setting area included in the export.



When the import is completed, click Finish.



The selected settings will now be included in the installation of RedHorse CRM where they have been imported.

Special Considerations When Transferring Settings

Backup - A full backup of the RedHorse SQL database should always be made prior to importing settings.

Existing Settings - **When importing, all data in the tables being imported will be deleted.** For instance, when importing custom views, all existing views will be deleted before importing the views from the transfer file. When importing custom tables, the existing custom tables will be dropped and recreated with the new structure. All data in the custom tables will be lost.

RedHorse License - When importing, the license number RedHorse CRM will not be overwritten. The license number will remain intact during the import process.

MASTER User - When importing users, the MASTER user will not be imported. The existing user and settings for MASTER will remain intact during the import process.

Data Consistency - Take care to consider data consistency when transferring settings. Below are some examples for how inconsistency can be created. This is not an exhaustive list. You must consider your choices carefully before transferring settings.

- Workflow - If you transfer workflow to a new system, but do not import the users that are assigned workflow tasks or do not import the lookups for the stage field on the business modules on which the workflow is based, you will get inconsistent results in the imported system.
- Custom Views - If you import Custom Views that reference data that is not available on the imported system, the views will cause errors when they are used in the new system.
- Activity Defaults - If you import activity defaults that reference custom activity types but do not include the lookups for those activity types, you will get errors when creating new activities using those defaults.

Please contact support if you experience any issues using the Settings Transfer Tool.