

FPM-CRM Connector

Installation and Upgrade Guide

New Installation Steps

Follow these steps to install the FPM-CRM Connector for the first time. If you are upgrading from an existing version, please refer to the Upgrade Steps section.

1. Run the following script from the Scripts-Preload folder against the BBCRM database:
 - CreateAttributes.sql
2. Deploy the contents of the bin\custom folder to the bbappfx\root\bin\custom folder of the BBCRM instance.
3. In BBCRM, go to Administration > Application > Catalog browser. Filter on Package and then load the following package:
 - FPM Package
4. Run the following script from the Scripts-Postload folder against the BBCRM database:
 - 01.FPM_setup.sql
5. In BBCRM, go to Administration > Configuration Data > Configuration import. Load the following configuration files from the Scripts-Postload folder in order:
 - 02.FPM_BatchTemplate_Configuration.xml
 - 03.FPM_Imports_Configuration.xml
 - 04.FPM_Query_Configuration.xml
 - 05.FPM_Exports_and_Definitions_Configuration.xml
 - 06.FPM_AFD_Configuration.xml*
 - 07.FPM_FTP_Configuration.xml*
 - 08.FPM_Queues_Configuration.xml*

***Note:** to load these 3 files successfully, a non-custom version of Auto File Download and File Transfer must already be installed. For custom versions, the AFD, FTP, and queue processes must be created manually.
6. Run the following scripts from the Scripts-Postload folder against the BBCRM database:
 - 09.FPM_post_configs.sql
 - 10.FPM_page_configs.sql

Upgrade Steps

Follow these steps to upgrade the FPM-CRM Connector.

1. Deploy the contents of the bin\custom folder to the bbappfx\root\bin\custom folder of the BBCRM instance.
2. In BBCRM, go to Administration > Application > Catalog browser. Filter on Package and then load the following package:
 - FPM Package