



INSTALLATION GUIDE

Sales Follow-up Automation

Install the web app, its SQL Server database and the reminder service on a Windows server in about ten minutes.

Version **1.0.0**

Setup file **SalesFollowUp-Setup-1.0.0.exe**

Windows 10/11 · Server 2016+ (64-bit)

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1 At a glance

One setup file installs everything the app needs. The target PC doesn't need .NET, IIS or any other runtime.



Web application

Runs as the **SalesFollowUp** Windows service on the port you choose, e.g. `http://server:5000`.



SQL Server database

Created (or upgraded) automatically, default name `SFADB`. Existing data is always kept.



Reminder engine

Checks every minute and emails salespeople before each follow-up, plus an optional daily digest.

System requirements

COMPONENT	REQUIREMENT
Operating system	Windows 10 / 11 or Windows Server 2016 and later, 64-bit
Database	SQL Server 2016 or later (Express edition is fine), on this PC or another server on the network
Permissions	Local administrator to run setup. A SQL login that can create a database (e.g. <code>sysadmin</code> or <code>dbcreator</code>)
Disk / memory	About 120 MB disk space · 512 MB free RAM
Network	One free TCP port for the web site (default 5000). An SMTP server for reminder emails (optional)
Browser (users)	Any current Edge, Chrome or Firefox, on desktop or mobile

2 Before you begin

Have these details ready. Setup asks for them in this order.



SQL Server name: for example `SERVER01` or `SERVER01\SQLEXPRESS`. Make sure the SQL Server service is running.



A SQL login and password that may create databases. Or use Windows authentication if you are installing on the same machine as SQL Server.



A free port for the web site (5000 unless something else already uses it).



Administrator email and password for the first account (8+ characters with upper-case, lower-case and a digit).



SMTP details (optional): host, port, username, password and the "From" address for reminder emails. You can add them later.



Tip: use a dedicated SQL login (for example `salesfollowup`) rather than `sa`. Give it `dbcreator` for the install; afterwards it only needs `db_owner` on the new database.

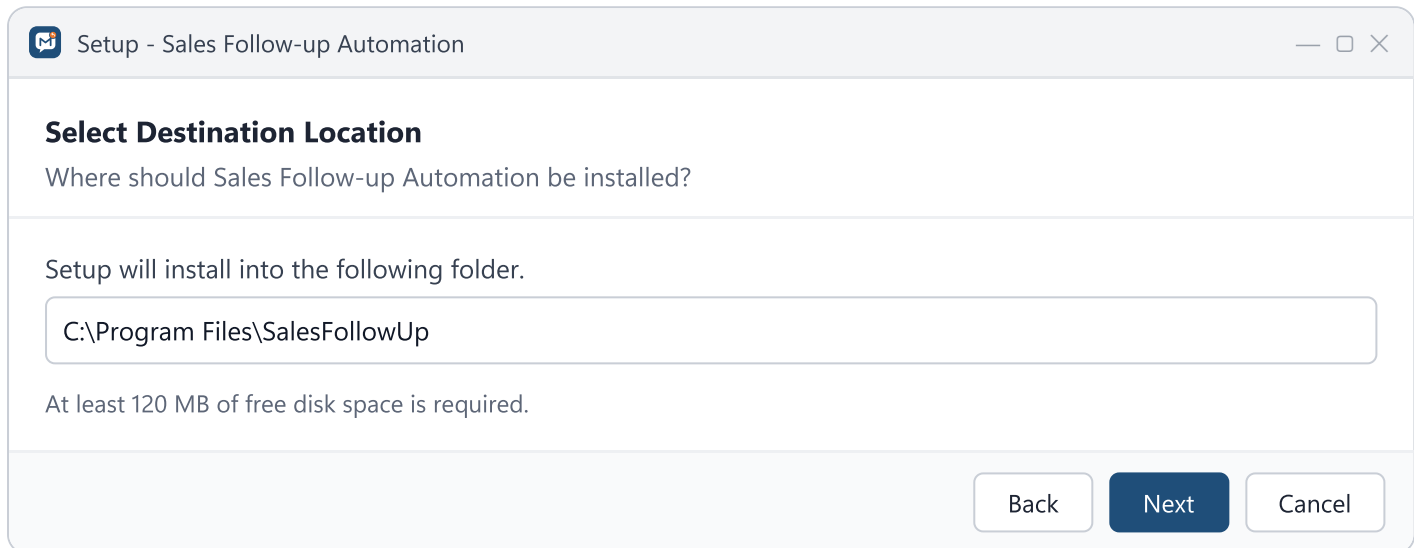
3 Run the setup wizard

Double-click `SalesFollowUp-Setup-1.0.0.exe` and accept the Windows administrator prompt. Then work through the screens below.

STEP 1

Choose the install folder

The default `C:\Program Files\SalesFollowUp` is right for most servers. Click **Next**.



The screenshot shows a Windows installer window titled "Setup - Sales Follow-up Automation". The window has a standard Windows title bar with minimize, maximize, and close buttons. The main content area is titled "Select Destination Location" and asks "Where should Sales Follow-up Automation be installed?". Below this, it states "Setup will install into the following folder." and shows a text box containing the default path "C:\Program Files\SalesFollowUp". At the bottom, it notes "At least 120 MB of free disk space is required." and provides three buttons: "Back", "Next" (highlighted in dark blue), and "Cancel".

Setup - Sales Follow-up Automation

Select Destination Location

Where should Sales Follow-up Automation be installed?

Setup will install into the following folder.

C:\Program Files\SalesFollowUp

At least 120 MB of free disk space is required.

Back Next Cancel

STEP 2

Database connection

Choose how the app signs in to SQL Server:

- **SQL Server authentication** (recommended): uses a login and password. Works for local and remote servers.
- **Windows authentication**: no password is stored. Setup grants the service account access automatically.

 Setup - Sales Follow-up Automation

Database connection

How should Sales Follow-up sign in to SQL Server?

Setup creates the database if it does not exist, or upgrades it if it does. Existing data is kept.

☒ SQL Server authentication (login and password) - recommended

☐ Windows authentication (the service account is granted access automatically)

BackNextCancel

STEP 3

Database server

Enter the server, the database name and the login. When you click **Next**, setup **tests the connection** and tells you straight away if something is wrong.

 If **SFADB** already exists, setup upgrades it and keeps all leads and history.

Setup - Sales Follow-up Automation

Database server

Where is SQL Server, and what should the database be called?

SQL Server name:

SERVER01\SQLEXPRESS

Database name:

SFADB

SQL login:

salesfollowup

Password:

.....

Back

Next

Cancel

STEP 4

Web site and administrator

Pick the **port** users will open in their browser, and create the **first administrator**. That account can then add salespeople under *Users*.

The administrator is only created on a brand-new database. Re-installing over an existing database never changes existing accounts.

Setup - Sales Follow-up Automation

Web site and administrator

Choose the port for the web site and the first administrator account.

Web site port (http://this-computer:PORT):

5000

Administrator email:

admin@yourcompany.com

Administrator password:

.....

Confirm password:

.....

Back

Next

Cancel

STEP 5 · OPTIONAL

Email reminders

Enter your SMTP server so salespeople get reminder emails. Leave **SMTP host** empty to skip this step. Reminders still appear on the dashboard.

PROVIDER	HOST	PORT
Microsoft 365	smtp.office365.com	587
Gmail / Workspace	smtp.gmail.com	587
Zoho Mail	smtp.zoho.com	465

Port 587 uses STARTTLS and 465 uses SSL. Setup picks the right one from the port. Gmail needs an *app password*.

Setup - Sales Follow-up Automation

Email reminders (optional)
SMTP server used to email follow-up reminders.

SMTP host:
smtp.office365.com

SMTP port (587 = STARTTLS, 465 = SSL):
587

SMTP username:
reminders@yourcompany.com

SMTP password:
.....

From email address:
reminders@yourcompany.com

BackNextCancel

STEP 6

Additional tasks

- **Create a desktop shortcut:** opens the site in the browser.
- **Allow other computers on the network:** adds a Windows Firewall rule for the chosen port. Tick this if salespeople will use their own PCs or phones.

 Setup - Sales Follow-up Automation — □ ×

Select Additional Tasks

Which additional tasks should be performed?

☒

 Create a desktop shortcut

☒

 Allow other computers on the network to open the site (adds a Windows Firewall rule)

Back

Next

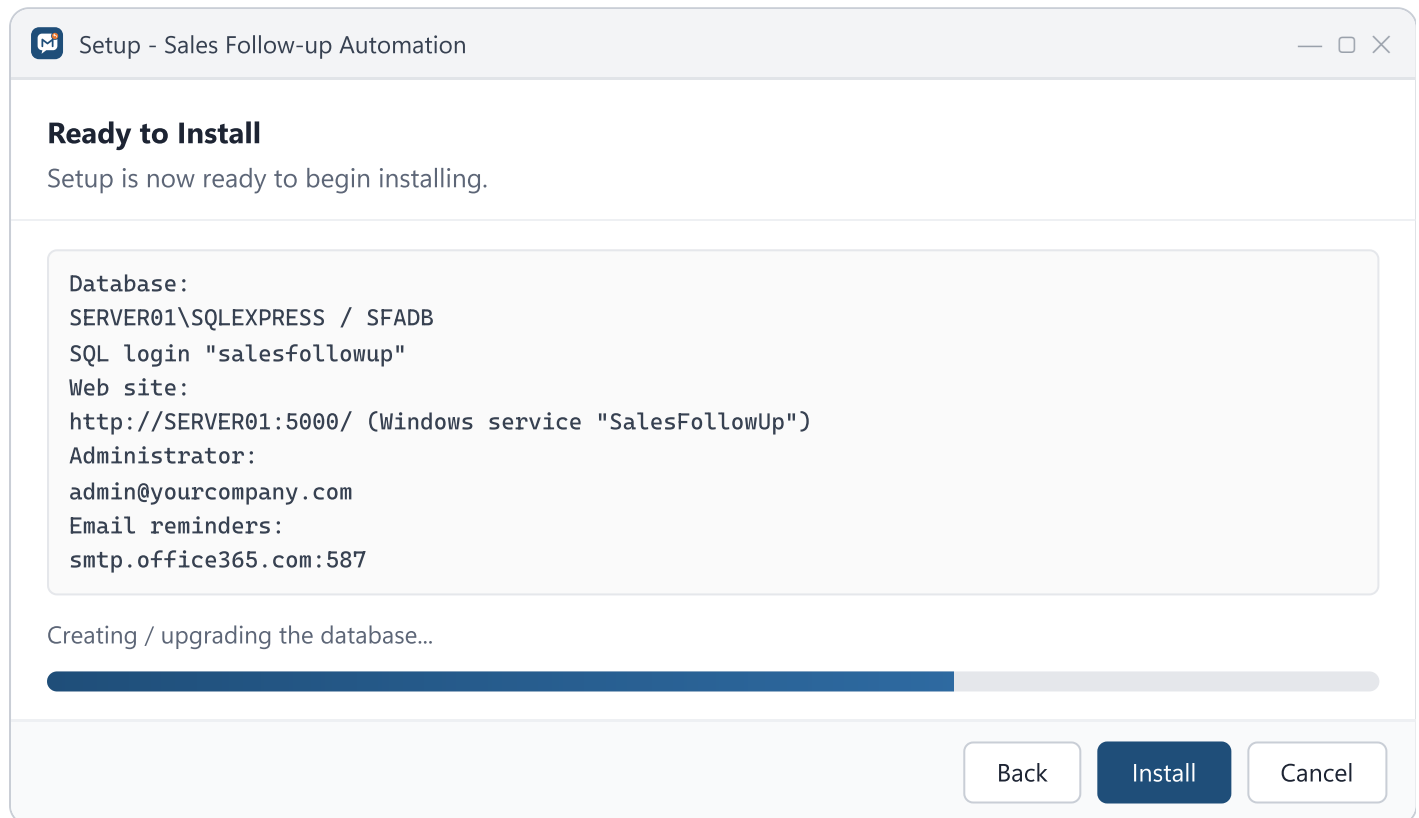
Cancel

STEP 7

Review and install

Check the summary and click **Install**. Setup copies the files, creates the database, starts the service and waits until the site responds. This usually takes under a minute.

On the last screen, leave **Open Sales Follow-up now** ticked and click **Finish**.



4 What setup changes

Everything setup does to the computer, in order. Nothing else on the server is changed.

1

Copy files

Program Files

2

Save settings

admins only

3

Database

create / upgrade

4

Windows service

auto start

5

Site ready

open browser

ITEM	DETAILS
Program files	C:\Program Files\SalesFollowUp
Settings file	appsettings.Production.json in the program folder. It holds the connection string and SMTP password, so it can only be read by Administrators and SYSTEM .
Database	12 tables (Leads , FollowUpActivities , FollowUpHistory , NotificationLogs , Users , plus sign-in tables). The log is in logs\setup-database.log .
Windows service	SalesFollowUp ("Sales Follow-up Automation"). Starts automatically (delayed), runs as LocalSystem and restarts itself if it stops unexpectedly.
Firewall	Inbound TCP rule Sales Follow-up for the chosen port, only if you ticked the task.
Start menu	Sales Follow-up · Settings · Repair database · Installation Guide · User Manual · Uninstall

5 First sign-in

1. Open `http://localhost:5000` on the server, or `http://SERVER-NAME:5000` from another PC.
2. Sign in with the administrator email and password you chose in step 4.
3. Go to **Users** → **Add user** and create an account for each salesperson.
4. Each salesperson can set their own reminder preferences under **Reminder Settings**, then click **Send me a test email** to check delivery.
5. Share the **User Manual** (Start menu, or `SalesFollowUp-User-Manual-1.0.0.pdf` next to the setup file) with your team.



Bookmark the address or pin it to the taskbar. On phones, use the browser's "Add to Home Screen" option. The app uses the Sales Follow-up logo as its icon.

6 Turn on email reminders later

If you skipped the SMTP step, or your mail settings change:

1. Start menu → **Sales Follow-up Automation** → **Settings**. Notepad opens; run it as administrator if Windows asks.
2. Fill in the `Smtp` section and save:

```
"Smtp": {  
  "Host": "smtp.office365.com",  
  "Port": 587,  
  "Security": "StartTls",           // SslOnConnect for port 465  
  "UserName": "reminders@yourcompany.com",  
  "Password": "your-password",  
  "FromEmail": "reminders@yourcompany.com",  
  "FromName": "Sales Follow-up"  
}
```

3. Restart the service: in an administrator PowerShell window run

```
Restart-Service SalesFollowUp
```

Then open **Reminder Settings** → **Send me a test email**. The *Delivery log* on that page shows the result of every email, including any error message from the mail server.

7 Upgrade & uninstall



Upgrade to a new version

Run the newer setup file over the existing installation. Setup stops the service, replaces the program files, **upgrades the database schema** and starts the service again. It skips the settings screens and keeps your settings.



Uninstall

Settings → **Apps** → **Sales Follow-up Automation** → **Uninstall**. This removes the service, program files, settings file and firewall rule. **The database is not deleted**, so you won't lose data by accident.



To remove all data permanently after uninstalling, drop the **SFADB** database in SQL Server Management Studio. Take a backup first.

8 Troubleshooting

– "Could not connect to SQL Server" during setup

- Check the server name. For a named instance include it: `SERVER\SQLEXPRESS`.
- Make sure the **SQL Server** service (and **SQL Server Browser** for named instances) is running.
- For a remote server, enable **TCP/IP** in SQL Server Configuration Manager and allow port 1433 in its firewall.
- For SQL logins, the server must be in **SQL Server and Windows Authentication mode** (Server Properties → Security).

– "The database could not be created or upgraded"

Open `C:\Program Files\SalesFollowUp\logs\setup-database.log`. The first lines give the reason, most often a missing *CREATE DATABASE* permission. Correct the connection string via **Settings**, then run **Repair database** from the Start menu.

– The site does not open in the browser

- Check the service: open `services.msc` and confirm **Sales Follow-up Automation** is *Running*.
- If it keeps stopping, see **Event Viewer** → **Windows Logs** → **Application** for errors from `SalesFollowUp`. A port already in use is the usual cause: change `"Urls": "http://*:5000"` in Settings and restart the service.
- From other PCs, make sure the firewall rule exists (re-run setup and tick the firewall task, or add an inbound rule for the port).

– Reminder emails show "Failed" in the delivery log

Hover over the error in **Reminder Settings** → **Delivery log**. Common causes: wrong password or an app password needed (Gmail/Microsoft 365 with MFA), port and security mismatch (587 = `StartTls`, 465 = `SslOnConnect`), or the From address isn't allowed to send for that mailbox. Each follow-up is retried up to 3 times.

- Windows authentication works for setup, but the site can't reach the database

The service runs as **LocalSystem**. Setup grants it access, but on a **remote** SQL Server that requires both machines to be in the same domain. Outside a domain, choose **SQL Server authentication** instead.

9 Manual database setup (for DBAs)

Only needed if your policy doesn't let applications create their own databases.

The script `database\SFADB_schema.sql` is installed with the app. It is **idempotent**: it only applies changes that are missing, so the same script also upgrades an existing database.

```
-- 1. Create the database
CREATE DATABASE SFADB;

-- 2. Apply the schema (from a command prompt)
sqlcmd -S SERVER01\SQLEXPRESS -d SFADB -E -I -i "C:\Program Files\SalesFollowUp\database\SFADB_sc

-- 3. Give the application's login access
USE SFADB;
CREATE USER salesfollowup FOR LOGIN salesfollowup;
ALTER ROLE db_owner ADD MEMBER salesfollowup;
```

Then run setup and point it at the existing database. It detects that the schema is up to date and only creates the administrator account.

10 Files & commands reference

PATH / COMMAND	PURPOSE
<code>SalesFollowUp.Web.exe</code>	The application (run by the service)
<code>appsettings.Production.json</code>	Your settings: database, port, SMTP, reminders
<code>logs\setup-database.log</code>	Output of the last database setup / repair
<code>database\SFADB_schema.sql</code>	Schema script for manual installs
<code>docs\Installation-Guide.pdf</code>	This guide
<code>Restart-Service SalesFollowUp</code>	Apply changed settings
<code>SalesFollowUp.Web.exe --setup-database</code>	Create or upgrade the database (same as Repair database)
<code>SalesFollowUp-Setup-x.y.z.exe /SILENT</code>	Unattended upgrade of an existing installation

