



Procedure: Program Updates Download and Installation Guide

September 2009
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Before proceeding with this procedure it is recommended that certain INI settings are first verified. Open the root directory of Riata™ CRM, open the file: riata (this is a text file list of Riata CRM configuration settings). Look for the line: PassiveFtp=Yes. Verify that “yes” is entered. Enter “yes” if this is blank or if “no” is in the field. Also check: Disable check for updates; “no” must be in the field. Save and exit the file. Some firewall settings may require adjustment to enable the download routine. Re-set the firewall after the download is completed.

Checking for and Applying Updates to Riata CRM

This guide will cover the sequence to check for program updates for your version of Riata CRM and how to install the updates if there are any available. There are two steps for updating Riata CRM: 1) download the update files; 2) install the updates.

Riata CRM requires a high speed internet connection for this procedure. Network firewall settings may require temporary changes to allow Riata CRM update files to download into your system.

How To Download Updates

The Check for Updates routine causes Riata CRM to connect to its website and compare system file dates, attributes, etc. To initiate the update process go to the top Riata CRM menu bar and select **Help | Check for Updates**. The dialog box will advise if updates are available for your Riata CRM.

Note: A current Riata CRM annual software maintenance agreement (SMA) is required to download updates. *You will receive a message in this first step of the procedure if your SMA has expired. The download routine will not proceed. Contact your Riata CRM reseller or Data Developers Plus to renew the SMA for your Riata CRM system.*

- Click yes in the dialog box if updates are available for your Riata CRM system.

The Download Process

CAUTION: all users must be logged out of Riata CRM and all linked accounting systems before downloading updates.

Downloaded update files are stored into a temporary folder and are installed as described in the next step of this procedure.

- A progress dialog box will be displayed during the download process, do not interrupt this sequence.

Installing The Downloaded Updates

All users must be logged out of Riata CRM and linked accounting systems before proceeding to install the downloaded updates.

Users must **not** attempt to log in to Riata CRM or the linked accounting system until the update process is completed.

You must have a complete system backup before applying any new updates.

Log in to Riata and select yes to install the updates. Select yes at the beginning of the installation when Riata prompts you to back up files. Riata will create a copy of the CRM folder in the folder: crmback. This backup procedure may take several minutes and cannot be interrupted.

After the backup process has completed, the downloaded updates will automatically be installed. When all updates have been installed Riata CRM will close - you will be returned to your workstation desktop view. Log in to Riata CRM as a test, verify that all functions are normal. Repeat this verification for your linked accounting system. Users can be allowed to log in to Riata CRM and the accounting system upon verification of system operations.

Restoring From the Backup

This procedure should be followed if it is necessary to restore Riata to its pre-update version.

Prior to applying a downloaded patch the Riata routine will prompt if a backup should be made. When "yes" is selected Riata makes a backup file in the crmback folder before applying the new patches that were downloaded. The crmback folder contains a copy of all folders, files, etc. that were in the CRM folder prior to installing the updates.

To restore the backup after the update procedure is completed: 1. rename the CRM folder to xCRM. 2. Rename the crmback folder to CRM. Riata will then operate as it did prior to the update.

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