



Procedure: Program Updates Download and Installation Guide

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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, proceed with the update procedure below.

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.

Downloading Updates

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

- A progress dialog box will be displayed during the download process.

CAUTION: it is recommended that all users are logged out of Riata CRM and all linked accounting systems before downloading updates, see pg. 2.

Installing Updates

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

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

Verify that all users are logged out of Riata CRM and linked accounting systems and that a backup of Riata CRM and the accounting system has been done. Initiate your login to Riata CRM, a prompt will appear for you to install the updates.

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

Select "yes" at the beginning of the installation procedure as another precaution to back up of your current Riata™ CRM System files into a temporary folder. This process 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.

Reminders

Have a complete backup of all of your Riata CRM and accounting system data before initiating the update procedure.

All users MUST be logged out of Riata CRM and any linked accounting system.

If selected, a secondary backup of some Riata CRM system files will occur at the beginning of the installation process and may take several minutes.

Users cannot be allowed to log in to Riata CRM or the accounting system until all updates have been installed and system operations verified.

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