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Support Document #111

Installing a Riata™ CRM Remote Synchronizer

1. Install the Riata™ CRM core (setup.exe) to the local hard drive of the remote computer (home or notebook)
2. Install the Riata™ CRM workstation (workstationsetup.exe) to the local hard drive of the remote computer (home or notebook c:\Riata). When it asks where the core is installed, make sure to point it to the same folder on the hard drive that you installed the core (setup.exe – should be c:\Riata).
3. In order to use the remote synchronization feature, you must have the correct license file installed in the root folder of the installation. After you install Riata CRM on to the local C drive of the notebook/home computer, the program will have placed a file, Riata.lic into the folder. This is the 30 day trial license. Using Windows explorer, delete the Riata.lic file. If you haven't already, copy the remote synchronizer license you were issued into the root folder of the install. The file should be named XXXXXX_remoteN.lic where XXXXXX is your customer number and N is the number of remote sync license. An example filename is DDP001_remote1.lic. Once you have that file in the root folder of the install, use Windows explorer to Copy it as Riata.lic Start Riata CRM and above the userid/pw of the login screen, it should say "Remote – 01 Single User". If you are unsure, please contact your Riata™ CRM VAR.
4. Log in as TEST/TEST and immediately go to the help menu, then "Check for Updates". Download the patch if there is one available. Then exit Riata™ CRM and restart the program. If any patches were downloaded, it will prompt you to apply it, say yes to apply it. The program will exit automatically.
5. Restart Riata CRM and log back in as TEST/TEST, select the sample company 00 and go to Tools/Maintain Users. Create your new user by setting up a user id that is identical to your user id on the network server. Ie if you login to Riata CRM on the network as RHJ, create a userid RHJ. Go to the security tab and check the top box "Supervisor Access". Don't worry, the security setting for the user will be reset according to the network when you complete a synchronization.
6. Exit Riata™ CRM, then restart the program and log into the sample company 00 as that new userid. Go to Maintain/Databases and click "Add" to create a new database. Enter the same company number as the network company. If the network installation is linked to an accounting package, it will be the same company number.
7. The system will exit after creating the new company. Log back in using your userid (ie RHJ) and choose the newly created company, which should be same as your network company.
8. Go to Wizards/Remote Synchronization and read each screen carefully. When it asks for the folder path, choose the folder on your company network where Riata™ CRM is located, ie S:\Riata. Do **NOT** choose the folder where the accounting package is located!!!



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During the first synchronization it is recommended you set both dates to 01/01/1980 so it downloads all data from your network. The date fields should be set to your choice on all subsequent synchronizations. A good idea is 30 days prior to the current date.

9. During the synchronization process, the screen may turn white and appear to be not responding. This is NORMAL behavior as Microsoft Visual Foxpro is busy working and is not letting Microsoft Windows know what it's doing. When it gets to a point where it's moving onto the next step in it's process, the screen will refresh. It is advised, though not mandatory, that once you start the remote synchronization process, you do not touch the computer and let it run. Depending on the size of your company data, number of customers, and financial transactions, it may take anywhere from a few minutes to an hour or more to complete the process. It is also recommended that the first time you perform a synchronization, you do so while connected to the company network vs. doing so remotely with a VPN connection. Again, this is not mandatory, rather a recommendation.