



Installation Procedure

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Riata™ CRM installation consists of two parts:

- A “**Core**” installation that contains the programs and databases.
The Core installation is installed on the network file server.
- A “**Workstation**” installation that contains runtime files needed to run Riata™ CRM.
The Workstation installation must be run on every workstation that will be connecting to Riata CRM including the terminal server if users will be running Riata CRM via Remote Desktop Connection or Citrix.

Core Installation

Install the “**Core**” installation on to the file server. Make sure that you are using a drive letter that is mapped that is the same as all workstations that will be running Riata CRM (for example F:\APPS\RIATA92).

Do not use the local drive letter of the server.

Note: *If you are upgrading from an earlier version of Riata™, make sure to install the “Core” installation into the same path as your earlier version.*

Workstation - XP

Install the “**Workstation**” installation onto all stations that will be using Riata CRM. When prompted: *choose the path where the Riata Core is installed on the server.* Complete the installation procedure.

Workstation - Vista & Windows 7

- A. Install the “**Workstation**” file onto the workstation that is networked to the Riata CRM file server. When prompted to Browse for the Riata CRM core installation: *choose the local c: drive of the workstation.* Complete the installation procedure.
- B. Double click the Riata shortcut icon on the desktop of the workstation and point the shortcut to the Riata.exe file in the Riata92 folder on the server. Save this path in desktop shortcut.

See page two if installing a Vista or Windows 7 Workstation to Sage Pro Series 7.5 / 7.6.

Workstation - Vista & Windows 7; Sage Pro Series 7.5 / 7.6

- A. Install the “**Workstation**” file onto the workstation that is networked to the Riata CRM file server. When prompted to Browse for the Riata CRM core installation: *choose the local c: drive of the workstation*. Complete the installation procedure.
 - B. Open your local c: drive through Windows explorer, go to the System 32 folder in the Windows folder...C: | Windows | System 32.
 - C. In the System 32 folder you should see a folder named VFP. Open that folder and locate these three files: 9 RT.dll, 9 RENU.dll, 9 T.dll
 - D. Export and save these three files to a temp folder (in case you need to restore them).
 - E. Double click the Riata shortcut icon on the desktop of the workstation and point the shortcut to Riata.exe in the Riata92 folder on the server. Save this path in your new shortcut.
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Microsoft Office®

Riata CRM requires Microsoft Outlook, Word and Excel to be properly installed on a local workstation (LAN) for email and letter-label merge utilities to function properly. An Exchange server is required for full functionality of Riata and Outlook in a wide area network environment. See page 185 in the Riata CRM User Guide located on the server: Riata92\crm\Help\Manual; or, while logged into Riata, press the F1 hotkey on your keyboard and type Exchange in the “Find” field in the upper left area of the display page.

Note: Riata CRM requires connection to an ftp site to download software programming updates. The update procedure begins in the Help menu located in the top right hand corner of the customer record: Help | Check for Updates. Riata CRM communicates through port 21.

Riata CRM User Guide: Riata\CRM\Help\Manual