UPDATING REDHORSE CRM

This article will walk you through the process of updating your installation of RedHorse CRM to the latest version.

Step 1: Download the Latest Version

There are two ways to download the latest version of RedHorse:

- **The RedHorse Website**

  The latest version of RedHorse CRM is available on the Downloads page of the www.redhorsesystems.com website. This page requires login. If you do not yet have a login, you may use the Register button at the top of the website to create one. Once logged in, go to Support, Downloads and click the link to the Current Version of RedHorse CRM to get the latest version.

  Select RedHorse CRM as the product to download, enter the RedHorse CRM License number that was provided to you after purchasing, and click Submit. Save the file to your computer.

- **Within RedHorse**

  You can download the update (setup.exe) from within Redhorse. Go to Help >> Check for Updates. If a newer version is available a Download button will be there. Click the download link and save the update file to your computer.

Step 2: Verify all users are logged out

When updating RedHorse, all users must be logged out of RedHorse. You can verify users are logged out by going to Admin >> Users and viewing the grid of users. A checkbox will appear in the Logged In column for anyone using RedHorse. If necessary, it is possible to force users to log out.

There are two methods to Log Out Users:

- Select Logout Users from the Users menu
- Right click on a User's row in the grid and select Logout Users

This will open the Logout Users Dialog. This dialog allows you to select one or more CRM users and forcibly log them out. You may also prevent their login to CRM. These options may be used separately or together to both log out and prevent login. Opening this dialog will also automatically clean dead logins in the system.

Force Logout

To force users to log out of CRM, follow these steps:

1. Selected one or more users from the grid
2. Check the Force Logout checkbox
3. Set the number of minutes for when the users will be logged out, between 1 and 10
4. Click Go

The selected users will be notified that the Administrator has scheduled maintenance. The notification will be updated every minute until the time of logout. If the user has not logged out by the designated time, their CRM will close. If Prevent Login is also checked, they will not be able to log back into CRM until allowed by the Administrator. You may not force logout for the user MASTER.

Step 3: Run the Installer

Run the setup.exe file that you downloaded on the system where RedHorse was first installed. Click Next to continue.

Choose the optional features to be installed. The prior choices will be shown and you can add Standard RedHorse SQL Reports at any time if they were not selected before.

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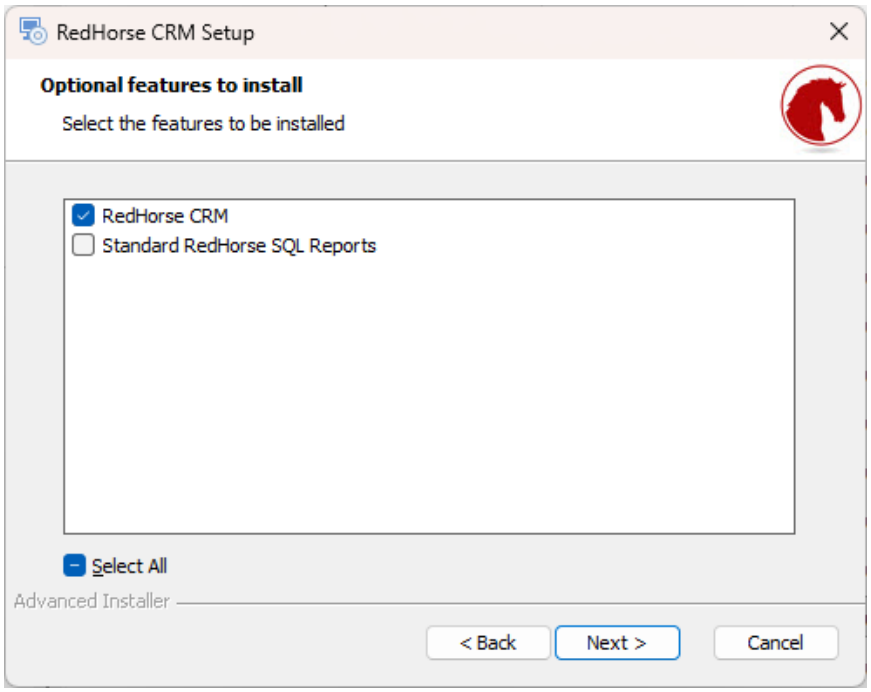
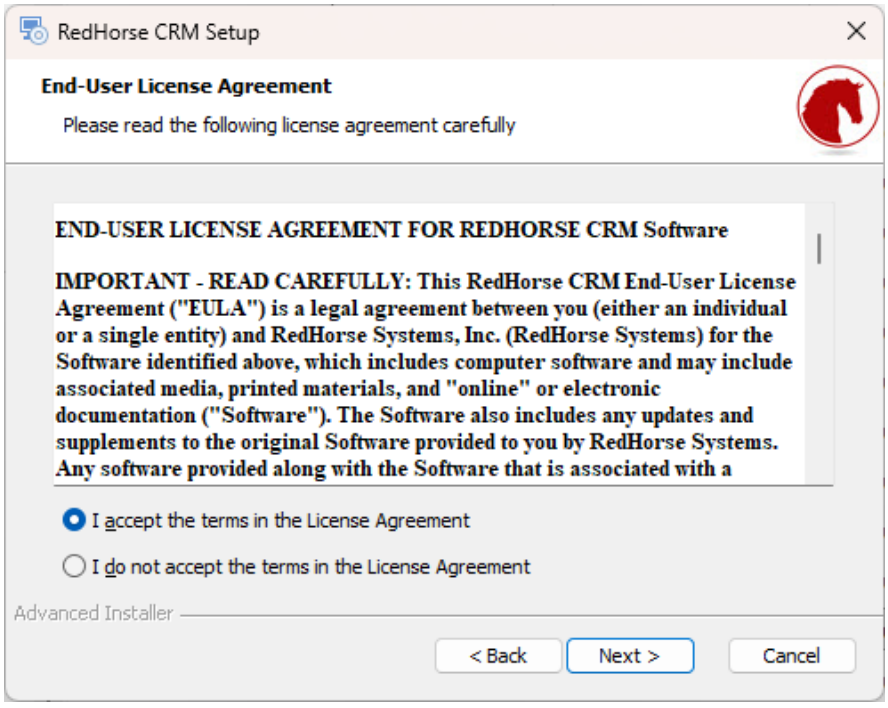


Select “I accept the terms in the License Agreement” and click Next.



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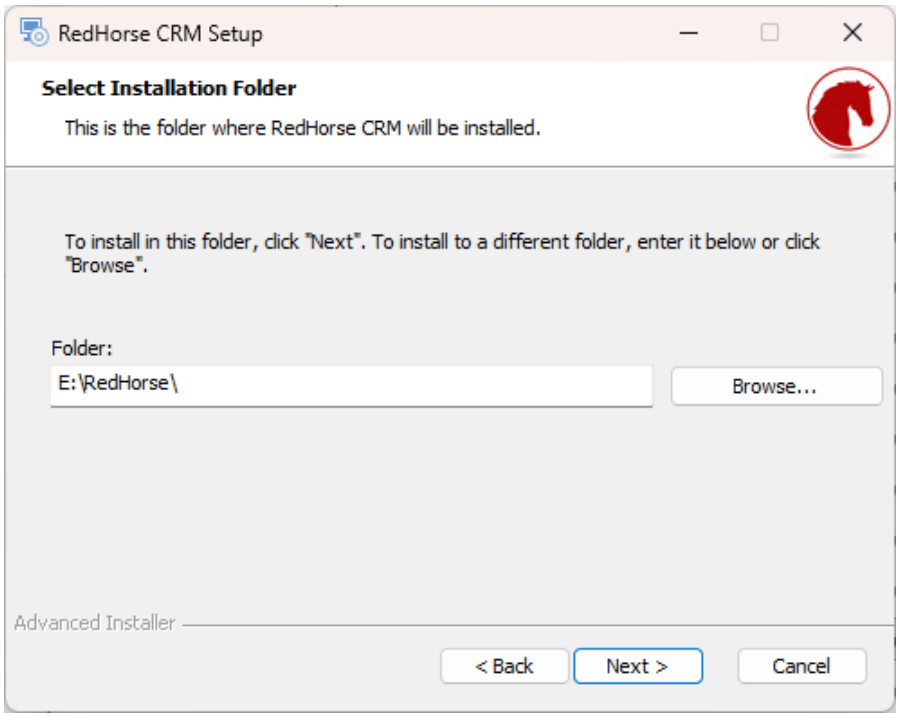
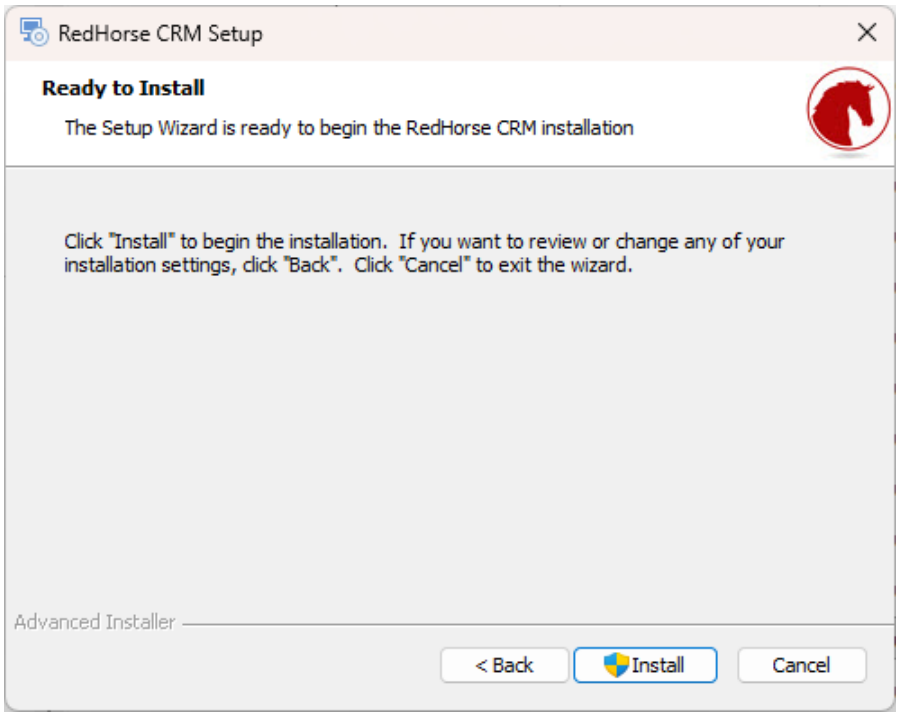
The installer will show the path where Redhorse is installed. If you ran the installer on the same machine where the original install was done, the installation folder will be correct. Verify the folder to be sure you have the right location. Click Next.



The installation is now ready to begin. Click Install.



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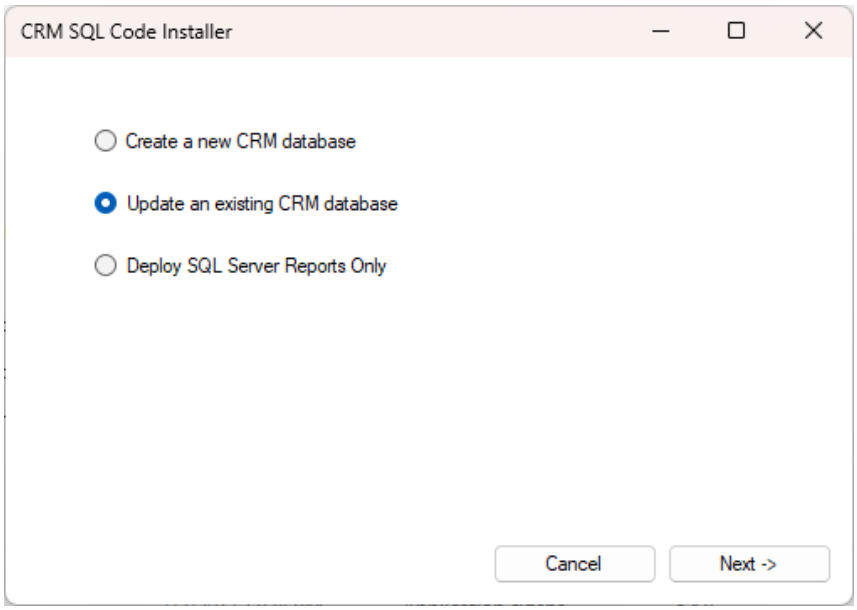
When the application has completed installing, the installer will automatically launch the CRM SQL Code Installer.

Follow the steps below to run the SQL Code Installer. When the process finishes, click Finish to close the installer.

Step 3: Run the SQL Code Installer

When the main installer finishes, the SQL Code Installer will automatically launch. This installer may also be launched manually from the path where RedHorse CRM is installed. The file is called SQL.exe.

Select Update an Existing CRM database and click Next.



Verify that the path to the CRM installation is correct. Click Next.

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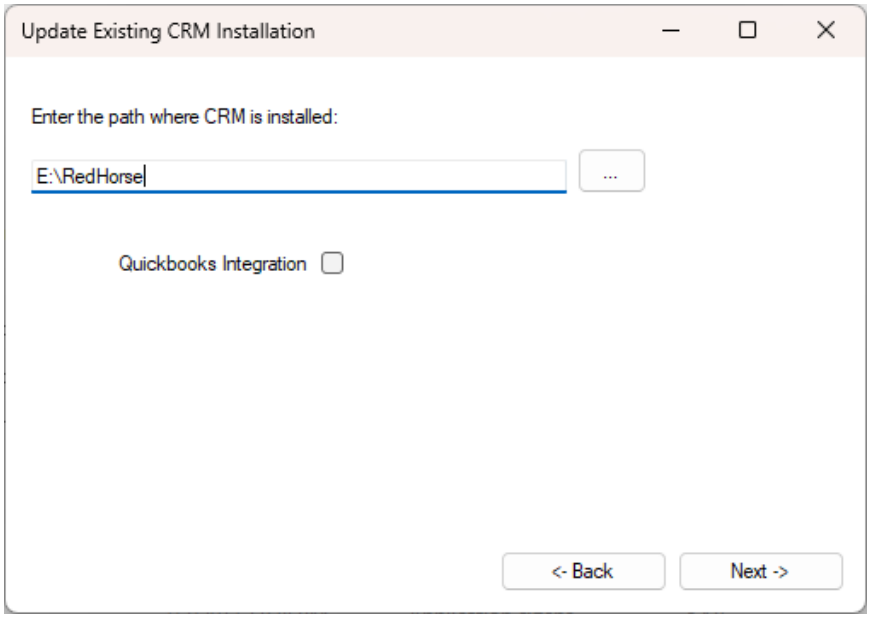
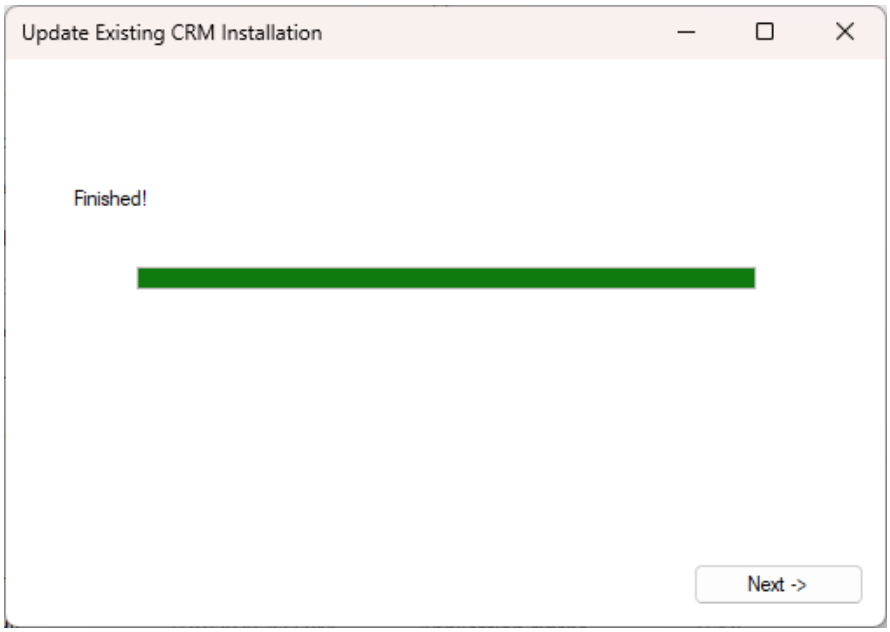


You will see the progress as the install runs. When the code update completes, click Next.



If you are using SQL Reporting Services, check “Deploy SQL Server Reports” to update the standard system SQL reports. Click Next. If you are not using SQL Reporting Services, leave the box unchecked and click Next.

If you are deploying reports, enter your SQL Reporting Services logon information. Check Overwrite Existing Reports if you want the installer to overwrite any standard reports that have been installed on the system with updated versions of the reports. It is recommended that you do not modify system standard reports. It is

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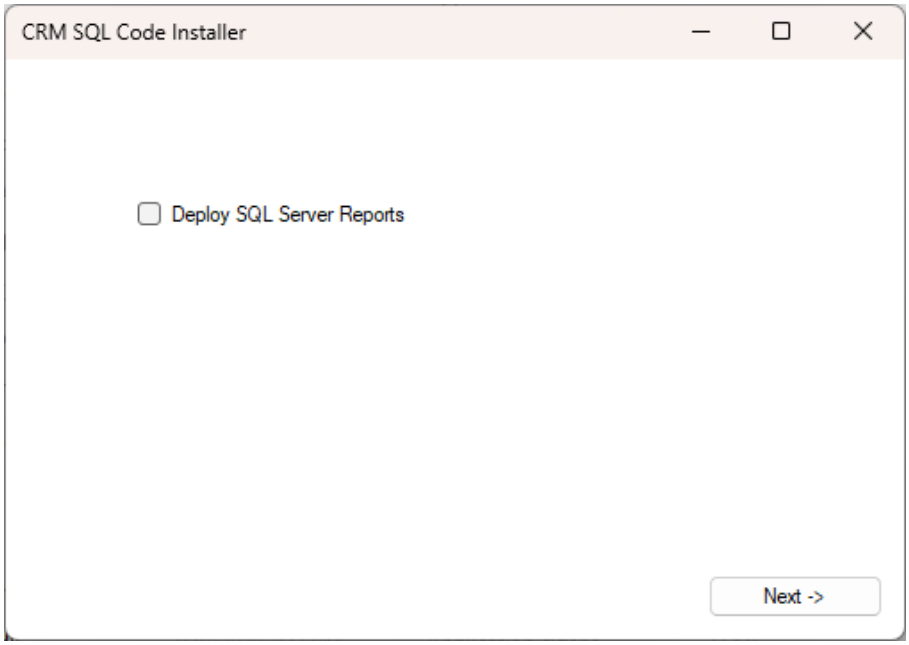
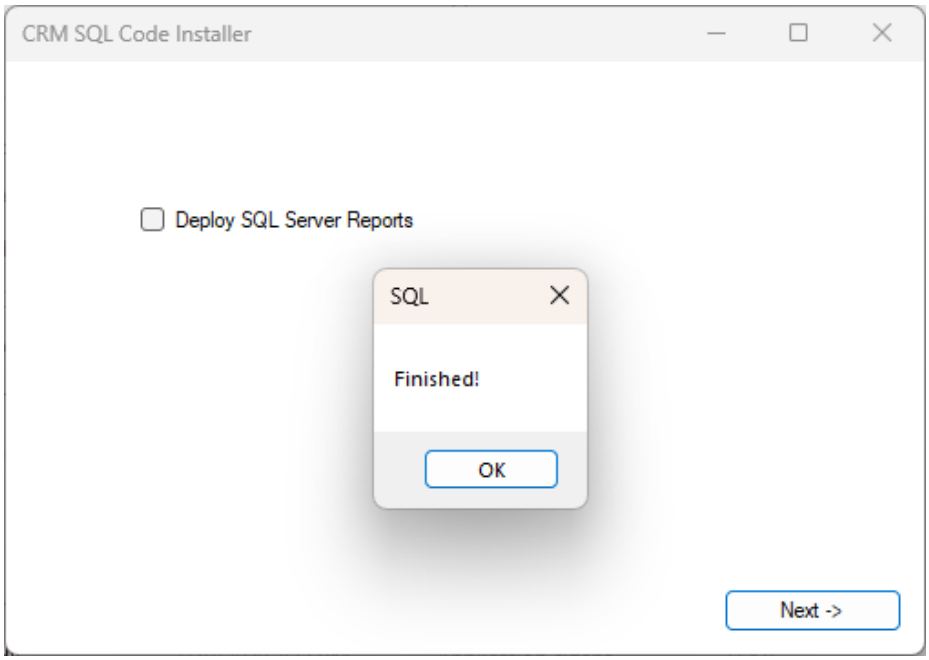
recommended to copy system reports before modifying so that new versions may be installed using this Override function. Click Deploy to begin. When you choose to deploy, you will see progress as reports are deployed.



The installer will then finish. Click OK.



After the code installer finishes, Click Close on the main installer to complete the update.

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Your installation will now be up to date with the latest version.

After updating Redhorse if any of the Service Engines are running you will also need to run rhenginesetup.exe. Rhenginesetup.exe is located in the folder where Redhorse is installed. A new rhenginesetup.exe is included with each update to Redhorse CRM. Click here for information on installing or updating RedHorse Service Engines.

Please contact support if you experience any issues during the update process. support@redhorsesystems.com www.redhorsesystems.com

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