# UPDATING REDHORSE CRM

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

## Step 1: Download the Latest Version

Updates are posted frequently to www.redhorsesystems.com. You should have received a logon for the website that gives you access to the Updates page. You may check the website any time for the latest version.

Visit www.redhorsesystems.com and log into the website with the username and password provided to you by support. Use the main website navigation bar to go to the Updates page. Click the download link and save the update file to your computer.

## Step 2: Run the Installer

Run the setup.exe file that you downloaded.

In the installer, browse to the path where you installed RedHorse CRM. The default path is c:\Program Files\RedHorse Systems\CRM.

Select the Update setup type.

Click Install.

When the installation completes, click Finish. This will launch the SQL Code 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.
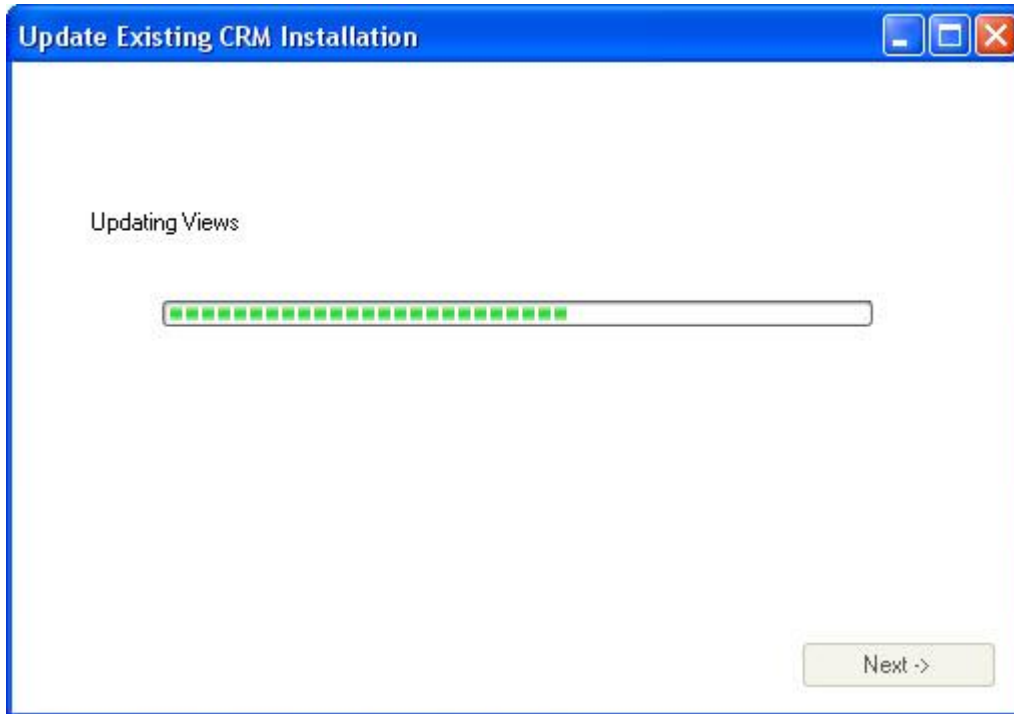
Select Update an Existing CRM database and click Next.

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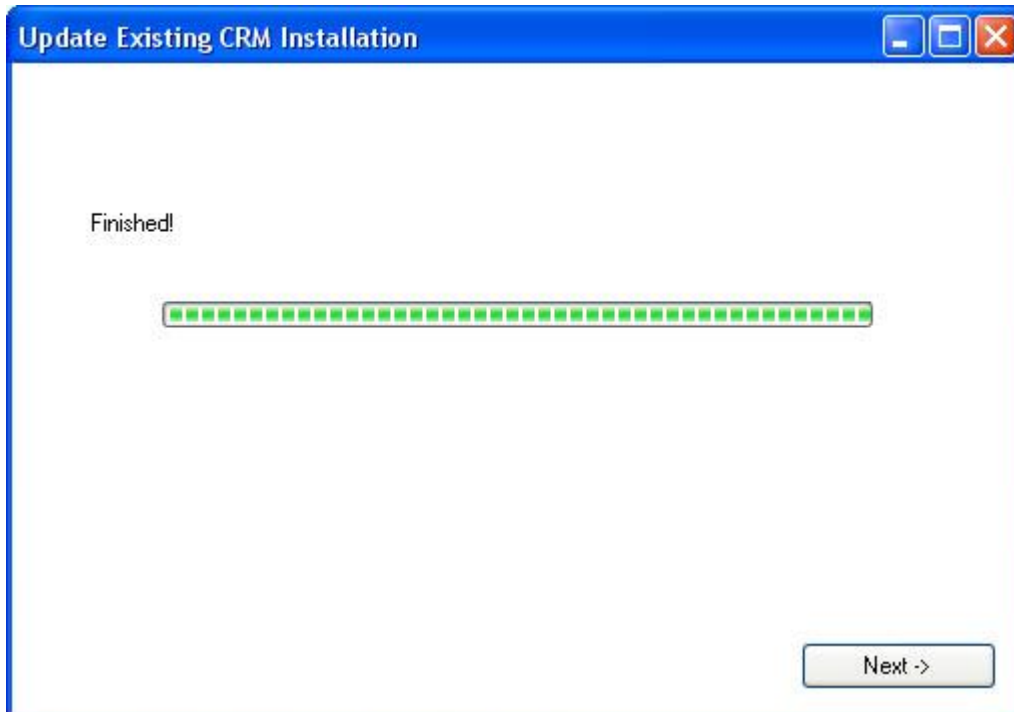support@redhorsesystems.com
www.redhorsesystems.com
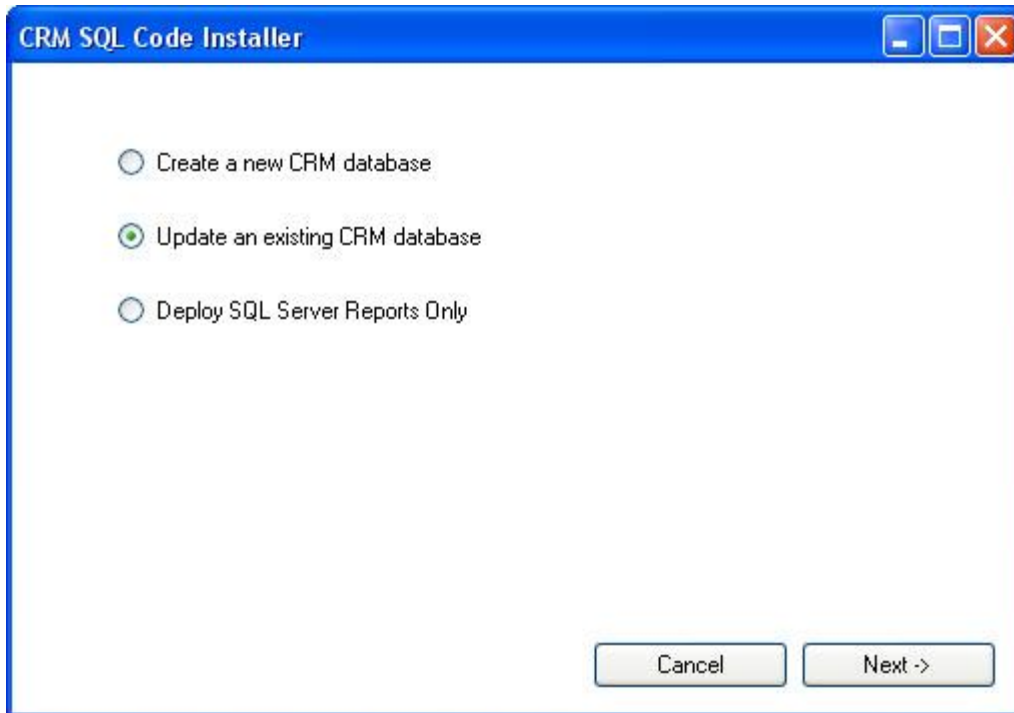
Check the path to the CRM installation. Check "QuickBooks Integration" if appropriate for your installation. These options are not available together. Click Next.
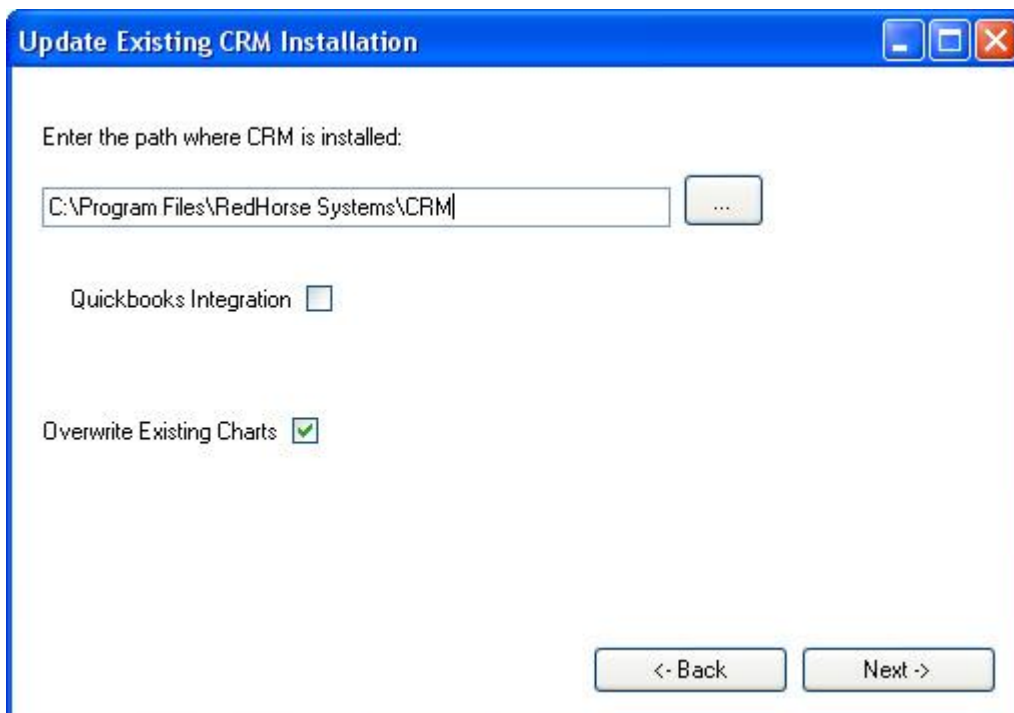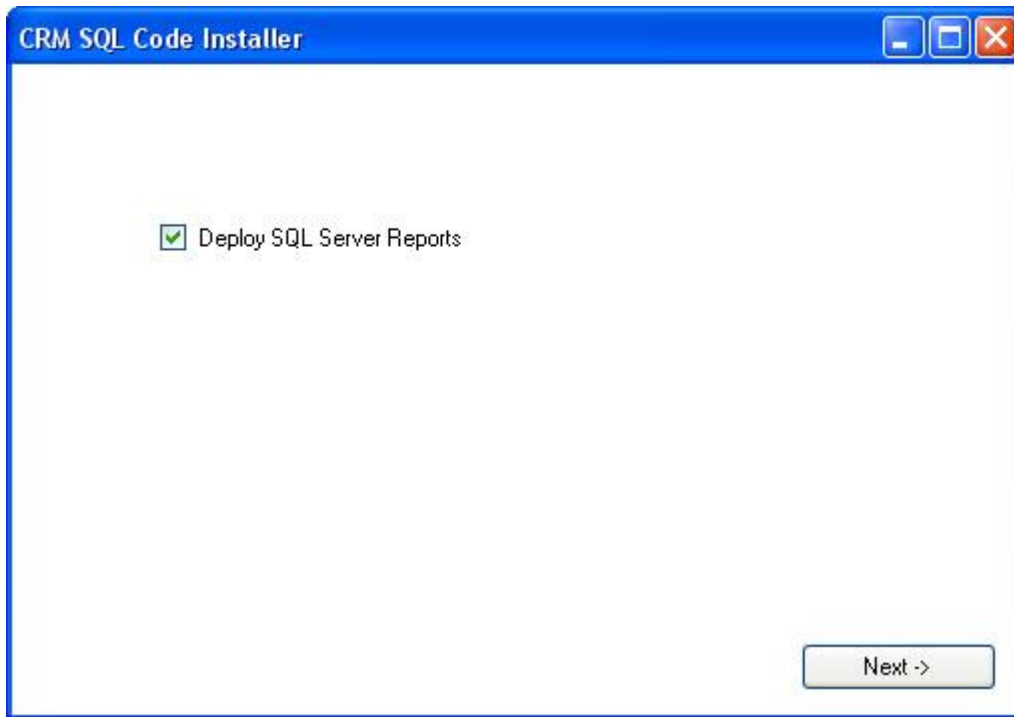
You will see the progress as the install runs.



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. The installer will then finish.



If you are deploying reports, enter 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 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.

Click Close when the installer finishes.
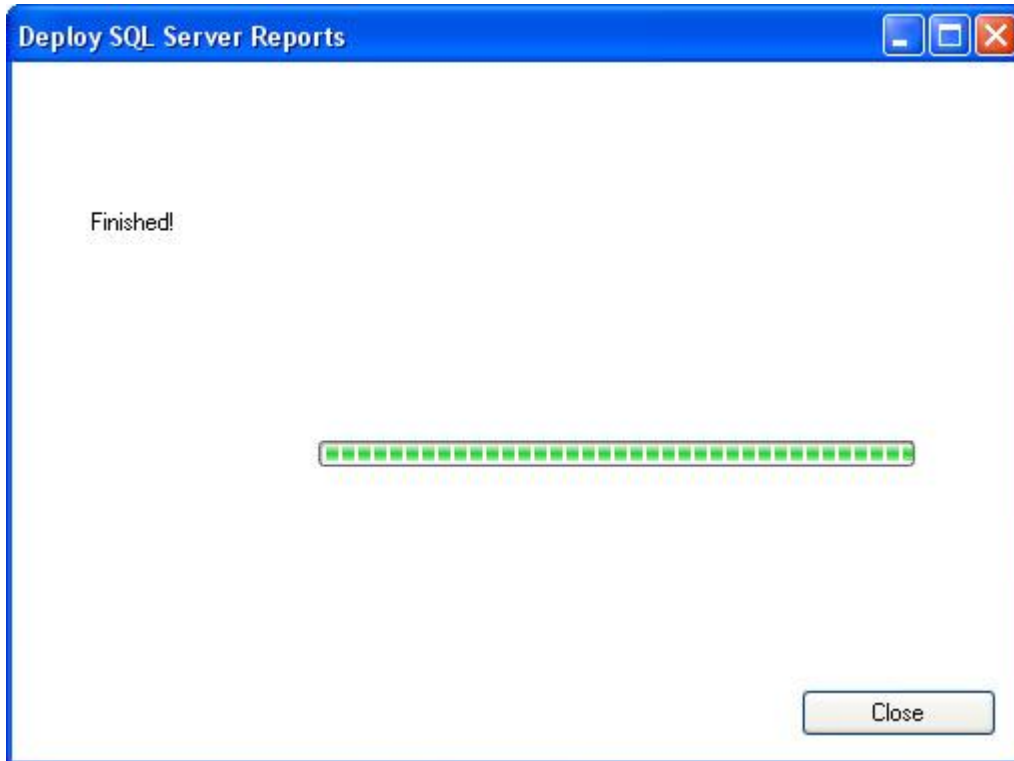


Your installation will now be up to date with the latest version. Please contact support if you experience any issues during the update process.

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www.redhorsesystems.com