



Procedure: Add Contacts to a Company Record

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Additional Contacts in Riata CRM

The Riata Company Tab shows the information for the primary contact of a customer record. Each of these primary contact records can have an unlimited number of additional contacts added to them. For example, if General Motors was one of your client companies you would have the primary contact for General Motors listed on the Riata Company tab. Other people within the company that you might need to contact can be added to this customer record. These added records will document names, emails, telephone numbers, etc. for each individual person without changing this same data in the primary record on the Riata Company Tab. Additional contacts are only contained in the Riata CRM system. These contact records are not added into the accounting system records, but will share the same customer number as the primary record as displayed on the Riata Company Tab. If you are linked to an accounting system, only the primary contact is stored in your accounting data files.

Adding an Additional Contact Record

Additional Contacts

There are no Additional Contacts defined.
Do you want to Add one?

Notice the word "None" to the right of the primary contact name field on the sample record below. This customer record does not have any added contact records. Click the "Contacts" tab and the dialog box on the left will appear. Click "Yes" and a new record will appear with some key data fields of the primary record populated, see bottom example. Note that the data in any of these fields can be changed at will when completing a new added contact record, or when editing an added contact record.

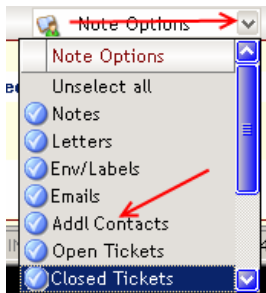


The semi-blank added record below is ready for data entry such as the contact person name, email, etc. The phone and fax numbers can be changed along with any other data fields. These changes will not affect the data on the Company Tab.

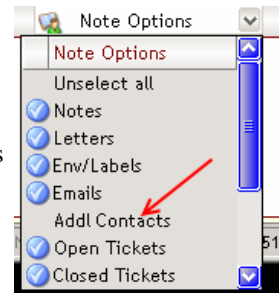
| | | | | | | | | | | |
|-----------------------|--|-------------|------------|-----------------|--------|--------|--------------|---------|-----------|-------------|
| Company | | Contacts | Sales | Notes | Custom | More | Activities | History | Email | |
| Cory Mallen | | None | 06/29/2005 | Customer Number | | KEY001 | | | | |
| KEY'S ADVENTURE TOURS | | Salesperson | | JAN | | | | | | |
| 55 Dolphin Lane | | County | | Dealer # | | | | | | |
| | | Country | | Last Contact | | | | | | |
| Fort Lauderdale | | ST | FL | Zip | 33315 | | Next Contact | | | |
| | | | | Customer Number | | KEY001 | | | | |
| KEY'S ADVENTURE TOURS | | Salesperson | | JAN | | | | | | |
| 55 Dolphin Lane | | County | | Dealer # | | | | | | |
| | | Country | | Last Contact | | | | | | |
| Fort Lauderdale | | ST | FL | Zip | 33315 | | Next Contact | | | |
| | | Lead Type | TOUR | Industry | 88 | | Territory | SE | | |
| | | Lead Source | | Status | | | | | | |
| 954/525-4441 | | Email | | | | | | | Freq | 0 |
| 954/974-1565 | | Website | | | | | | | Interests | 0 Documents |

Click “Save” in the upper right hand corner of the new added contact record. Notice that this new record has the same customer number as the primary record and “1” appears to the right of the contact name. Once this new record is saved you can click on the Custom and More tabs, if needed, to populate data fields that will be specific to this added contact record. Notes can also be entered for added contact records and can be viewed in either the primary contact notepad screen or in the individual contact notepad screen, as determined by the “Notes” settings in your Riata system. See explanation below. Future follow up contact dates can be assigned through the Notepad and Activities utilities for each added contact record.

Notepad Display Options

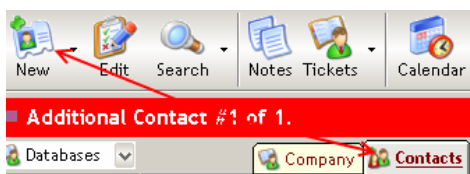


Notepad entries for customer records with multiple added contacts can rapidly grow and become difficult to navigate and audit. Riata tracks notes that are entered on a specific record, primary or added, and can then organize all notepad entries by each individual record. Notice the drop down menus to the left and right. This Notes Options menu is accessed by clicking the down arrow to the right of “Notes Options” in the upper right hand corner of the Notepad area.



“Additional Contacts” is turned on by default in Riata (left). With this option turned on all notepad entries for all records that have been added to a primary customer record will be displayed in the notepad area for all of the records. This option can be turned off, as shown in the sample list on the right. With this option turned off only those notepad entries that are made in a specific record (primary or added) will be displayed on the record in which the note was entered.

Other Notes



Once the first added contact is saved the procedure to add more contacts is started from an added contact record, not the primary contact record. Simply click to display an added contact record, then click the “New” icon to open another semi-populated added contact record. Populate the fields as needed and save. You will notice that the number to the right of the contact name will increase, based on the number of contacts added to the primary record. A down arrow will appear to the right of this number after a second contact is added. Click this arrow to see a menu of added contacts, highlight and click a contact name to access that specific contact record.

Additional contacts can be included in screen searches as shown below. Verify that these settings are correct, based on the customers to be included in a search. Either Primary Contacts or Additional Contacts must be turned on to launch a screen search. Both can also be selected.

Interactive Search Primary contacts Additional contacts