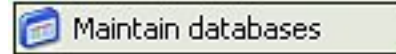




Add New Database

The **Maintain Databases** feature allows add or delete Riata™ CRM Databases. To access the **Maintain Databases** feature, from the pull-down menus, select **Tools | Maintain Databases**.



PERFORM A COMPLETE BACKUP BEFORE PROCEEDING. ONLY YOU ARE RESPONSIBLE FOR YOUR DATA. DO NOT TURN OFF THE COMPUTER DURING THIS PROCESS OR YOU RISK LOSING ALL OF YOUR CONTACT RECORDS!

An example of the **Maintain Databases** screen is shown below.



You can have up to 99 databases defined, and each database can contain up to 1 billion records. You can have some databases linked to VP/Pro Series/Sage Pro, and some that are not linked. For example, you may have a leads database not linked to your accounting system, and an actual customer database linked to VP/Pro Series/Sage Pro.

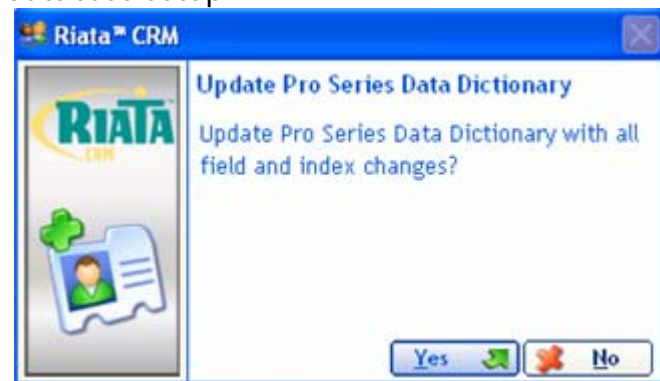
To create a new database, press the Add button, and enter in a database number, a description, and a valid path for the databases. **To link to VP/Pro Series/Sage Pro, enter in the location of that systems SYSDATA.DBF file.**

Important Note: *If you are linking to Vision Point or Sage Pro, the company number you create MUST be the same as your company number in Vision Point or Sage Pro.*

When adding a new database, make sure all users are exited from both Riata™ CRM and the VP/Pro Series/Sage Pro accounting systems.

Steps for Adding a New Database

- 1) Type in the Database number you are adding. Remember if you are linking to Vision Point/Pro Series/Sage Pro, *the database number must be the same as your company number in the accounting system*
- 2) Type in a name for the database
- 3) After you've typed in the database number, the **Data Location** will default to the Riata installation directory and then a subdirectory under that for "data" + database number. This is where all the notes and additional contact information is stored. It is best to leave the default if possible.
- 4) **Accounting Link**
 - a. If linking to Vision Point/Pro Series/Sage Pro, change the Accounting Link to Y
 - i. Either use the Locate button to browse to the **system directory** of your accounting system installation or type in the path. You need to type in the path where they system files exist, such as SYSDATA.DBF. If you did not point to a valid location, Riata will notify you of such and you will need to try again.
 - ii. Move to the Options Tab and the click on the Save Button when you have completed the database setup.
 - iii. If linking to SBT/Pro Series/Sage Pro (not Vision Point), you will be prompted to Update the Data Dictionary with the field and index changes. *You will want to choose yes to this option if you want the Reindex in the accounting system to include all the new indexes for Riata. If you do not choose Yes to this option then when you reindex in your accounting system you will immediately need to go into Riata and reindex there as well before letting users back into either system.* See Appendix F for a list of fields and indexes that will be added to the SBT/Pro Series/Sage Pro data dictionary.
 - b. If not linking to an accounting system leave Accounting Link as N and move on to the Options Tab (see Below)
- 5) **Templates Folder** is the location where your letter, email, and label templates will be stored for this database. If you will have multiple



databases, it is beneficial to separate the templates for each database if the letterhead is different or you would not want to see the same letter templates in all the databases.

Database Options Tab

The maintain databases screen also allows you to set other various options for each of your database companies.



Automatically assign customer numbers - This option determines whether or not the system will automatically assign customer numbers to new contact records or if you will type them in. If you choose to create them, the system will check for duplicates.

Automatically assign salesperson - This option is used in conjunction with Zip Code Assignments found later in this chapter. When adding contacts if this option is enabled, the salesperson will be assigned to the contact based on zip code look up table.

Audit Report - This option determines whether or not the system will automatically track each report printed by users. This log can be useful for sales managers and security purposes.

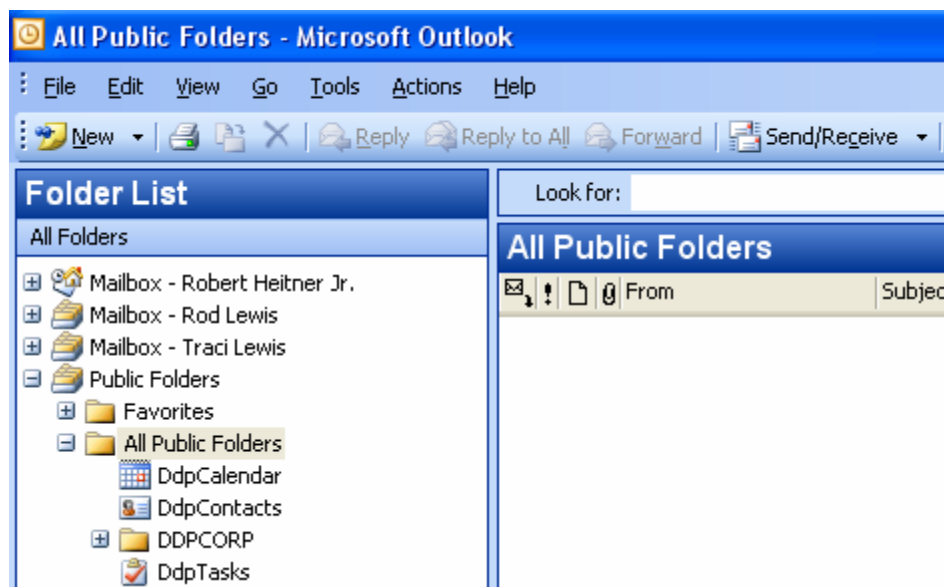
Save Outlook Email contents to Contact Notes - This option will save the contents of the email to the Riata Notes/History table. If this option is not on

and you are synchronizing, then just a link to the email is stored. This option is very useful to turn on if you are using remote synchronizers.

Sage Pro Series Customer Note as the Priority Memo - This option is available if you are linked to VP/Pro Series/Sage Pro. This will allow users in the accounting system to also see and edit the memo from within VP/Pro Series/Sage Pro because it will be using the ARCUSTxx.CSTMemo field versus the Riata note field in the custom Riata tables.

Use Pro Series Lookup Tables for Field Pop-ups - With this option checked, the pop-up lists in Riata will utilize the pick lists that are set up in the accounting system. The fields affected are Salesperson, Territory, Terms, Price Code, Sales Category and Statement Type.

Exchange Server Public Folder Setup - If your company uses Exchange Server, you can create a calendar type public folder so when users create calendar activities, instead of writing the activity to their local calendar, it will write the activity to the public folder calendar. The same is true for tasks. If you create and contacts type public folder and choose to use it, whenever you add a new contact, or edit an existing contact, the contact information is added or edited in the public contacts folder. **In order to set this up, you *must* create the folder(s) in the "All Public Folders" folder as shown here.**



Once you create the folder(s) in the all public folders, check the box next to the respective choice and type in the name of the folder and then **press the verify button**. The verify button will verify the name you typed in the screen exists in the all public folders.