



Network User Settings

To Link With Microsoft Office Applications

February 2009
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Network System Requirements:

Minimum - Windows 2003 Server; Terminal Services for WAN environment; XP Professional operating system for LAN clients; Office 2003 - Word, Excel, Outlook.

Network settings for form letter and mailing label merge utilities

All Riata™ CRM users need read/write/delete access to:

C:\

C:\documents & settings\their userid\crm\

C:\documents & settings\their userid\my documents\

C:\documents & settings\their userid\my documents\local settings\temp\

c:\wordcust.xls

Terminal Services users must have Write access to the wordcust file in the root of the c: drive for data (letter) merges in form letters and mailing labels and Outlook emails.

The user environment variables for TEMP and TMP (right click my computer/properties/advanced/environment variables), require read/write/delete access.

Riata CRM needs the ability to create temporary files, make changes to the temporary files and delete the temporary files. Without this ability, the program will error out.

Riata CRM has an update feature that downloads patches and then applies the patches to the software application. Consequently, all users also need read/write/delete access to the Riata folder on the network.

Microsoft Office Settings

Set Macro Security level to “Low” for Word and Excel:

Tools | Macro | Security

Outlook

See Guide: “RCRM_Email_Outlook.pdf” for more details about synchronizing Outlook email with Riata CRM.

Technical support: support@ddpcorp.com