

Riata uses an INI file, **RIATA.INI**, to customize its behavior and to set certain program options. These options should be changed only by a system administrator who is familiar with maintaining INI files.

The INI file settings are in separate groups for **General** settings, **Accounting** related settings, Microsoft **Office** related settings, Remote **Synchronizer** settings, and **Custom** settings.

Make sure to have a complete backup of your system before changing any settings. Also, as a backup, there is a standard RIATA.INI file located in the .\CRM\DATA\DEFAULT folder.

General Settings

[General]

; Installation Settings

CheckProgramLocation=Yes

- Riata uses system databases to store installation information. If this option is set to Yes, Riata will verify the installation information. If the installation Drive or Folder has changed, the user will be prompted for the change.

; Use sounds for system events

UseSounds=Yes

- If set to yes, Riata will play sound events for certain actions such as a button click, completion of a save event, etc.

; Look up City, State, and County based on Zip Code

ZipCodeLookup=Yes

- When set to Yes, during data entry for a contact's address, when a Zip Code is entered in, Riata will look up the City, State, and County for that Zip Code and update the contacts address.

; Use internet connection to look up Zip+4 information

ZipPlus4=No

- This option requires that all users have a fast and reliable direct connection to the internet. When set to Yes, during data entry for a contact's address, when a Zip Code is entered in, Riata will connect to the internet and try to determine the correct Zip+4 code. Enabling this option may slow down data entry speeds.

; Force city to uppercase on zip code lookup

ZipUpperCity=No

- When this option is set to Yes, Riata will change the City portion of the Address to Upper Case.

; Automatically fill in Opening field

FillOpening=Yes

- When this option is set to Yes, Riata will automatically fill in the Opening field with "Dear " and the contact's first name if the Opening field is currently blank.



; Automatic customer numbering

AutoNumbering=Company

- If the current database options are set for automatic numbering of new contact records, a setting of "Company" will base the number on the company field, if this setting is set to "State", the number will be based upon the state field.

; Update Last Contact Dates for mail merges

MergesUpdateContactDates=Yes

- When this option is set to Yes, the last and next contact dates will be updated for those contacts included in mail merges.

; Contact Note Security

OverrideNoteSecuritySettings=No

- When this option is set to "Yes", all users will be able to access all contact notes regardless of their security settings.

; Prompt for Activity Follow-ups

PromptForFollowUps=Yes

- When this option is set to "Yes", after marking a task as completed, Riata will display a prompt allowing you to easily set another follow-up task.

; Return to Login Screen on Exit

ReturnToLogin=No

- If this option is set to "Yes", Riata will return you to the login screen after exiting a database rather than returning you directly to Windows.

Accounting Settings

[Accounting]

; Settings for Receivables Inquiry

OpenReceivables=No

- Currently this option is not implemented.

; Use Advanced Item Pricing Options

AdvancedPricing=Yes

- When this option is set to "Yes", Riata will support some advanced pricing features such as discount levels.

; Allow internal item notes during order entry

OrderNotes=No

- When this option is set to "Yes", Riata will enable an additional item notes field in the order entry screen. It is not recommended to change this setting without intimate knowledge of the order entry process.

; Use Riata CRM forms for orders and invoices

UseCMForms=No

- When this option is set to "Yes", Riata will use its own forms for items such as Invoices, Orders, and Bids. The default setting of No instructs Riata to use the forms from the accounting system directly if possible.



; Use Riata CRM Packing Slips

UseCMPackingSlips=No

- When this option is set to “Yes”, Riata will use its own forms for packing slips and picking tickets.

; Custom search for item on purchase orders

PurchaseOrderSearch=No

- When set to “Yes”, this option enables a custom feature to allow finding a customer by entering in one of their purchase order numbers. This is a custom feature and it is not recommended to change this setting without advanced knowledge of both Riata and your accounting system.

; Automatically Create Additional contacts for ship to addresses

ShippingContacts=No

- When this option is set to “Yes”, Riata will automatically create an additional contact record for each “Ship To” location in your accounting system. This is a custom feature and it is not recommended to change this setting without advanced knowledge of both Riata and your accounting system.

; Copy item notes from order to contact notes

CopyItemNotes=No

- When this option is set to “Yes”, Riata will copy custom item notes from the order entry screen into the main contact notes. This is a custom feature and it is not recommended to change this setting without advanced knowledge of both Riata and your accounting system.

; Support for Currency being blank

AllowBlankCurrency=No

- When this option is set to “Yes”, Riata will allow contact records to have a blank currency field. It is not recommended that you change this setting.

Office Settings

[Office]

; Use wildcard for viewing word letters

WordUseWildCards=Yes

- When this option is set to “Yes”, Riata will use wildcards in locating contact letters. This option should not be changed unless directed to by technical support.

Synchronizer Settings

[Synchronizer]

; Synchronization file groups

SynchronizeFileGroups=Yes

- When this option is set to “Yes”, Riata will synchronize files in related groups. For example, if you are synchronizing bids, inventory items will be included as well. This option should not be changed unless directed to by technical support.



Custom Settings

[Custom]

; Synchronization file groups

Developer=No

- When this option is set to “Yes”, Riata will enable some debugging features. This feature is for advanced developers with source code only.

; Synchronization file groups

DisplayFormNames=No

- When this option is set to “Yes”, Riata will display a wait window with the name of the form currently being printed. This feature is for advanced developers with source code only.

; Synchronization file groups

CustomizedVersion=No

- If you have purchased customizations, you may be instructed to set the value of this field. This feature is for advanced developers with source code only.

Customized Program Options

Customer Number Generation

If a file named “**NEXTCNUM.FXP**” exists, Riata will call this program to generate the next customer number instead of its internal routines.

Post Contact Add routine

If a file named “**POSTADD.FXP**” exists, Riata will call this program after a new contact record has been saved. This routine can be used to customize the newly added contact record.

Pre Order Entry Setup

If a file named “**CMSBTPOST.FXP**” exists, Riata will call this program just prior to executing the order entry routines. This can be used by advanced programmers to set up variables, paths, procedures, etc for custom order entry routines.