



## Install Riata™ CRM Database Companies

Linked to ALERE® Accounting Companies

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Multiple databases can be added in the Riata CRM system with the option to link a new Riata CRM database to an ALERE Accounting company. Creating the accounting link during the installation of a Riata CRM database joins the new database to the selected customer database in ALERE.

(More details: see pg. 141 in the Riata CRM User Manual: Riata\CRM\Help\Manual).

**Select ALERE Company (Press Enter to Select)**

Coid	Version	Name	Path
TIW	6.5	ALERE Inc.	Memo
05	6.5	Al Misc	Memo

**Welcome to Riata™ CRM 9.6.5**

Round up customer data - how you want it, when you want it. Riata™ CRM's powerful Sales and Marketing tools put you in charge.

Please select a database to open:

- 00 | Riata™ CRM Sample
- 01 | Al Misc
- 12 | ALERE Inc.
- 92 | Outlook Import

**Maintain Databases**

Settings For: Al Misc

Database #: 01

Description: Al Misc

Data Location: C:\RIATA -1\RIATA65\DATA01\

Accounting Link: Y

System Location: C:\RIATA ALERE\AC65\ [Locate]

Alere Database: AL MISC [Select]

Database Path: C:\RIATA ALERE\AC65\AL MISC\

My Company COID: 05

Templates Folder: C:\RIATA\_-1\RIATA65\MAILDA [Locate]

Linking a new Riata CRM database to ALERE Accounting is a simple procedure as shown in the General Settings screen above:

- 1) The location of the ALERE installation is identified through a browse list.
- 2) The destination ALERE database is selected from a list, the path automatically populates.
- 3) The COID of the destination ALERE database is filled in.

Notice in the diagrams above that Database 01 is installed in Riata CRM and labeled as "Al Misc". During installation this Riata CRM database was linked to COID 05 in the ALERE Accounting system, database path: C:\RIATA ALERE\AC65\AL MISC\

Multiple Riata CRM databases can be linked to one ALERE Accounting database by selecting the same ALERE database during the installations. This option is used by companies organized into different departments such as Sales, Accounts Receivable, Customer Support, etc.. The customer record attributes in a Riata CRM database can be customized according to the specific workflow requirements of each department.

Stand alone databases, without an accounting link, can also be created in a Riata CRM system. Many companies use a stand alone database for prospects and other customer categories. Riata CRM provides a database transfer utility to move the customer information from a stand alone database to an ALERE linked database. With this utility all customer information, notes, data field entries, etc. are ported to the destination database. An ALERE Accounting customer record is created during the transfer process.

**For more Information or to schedule a Riata CRM webinar: [ads@ddpcorp.com](mailto:ads@ddpcorp.com)**

Product specifications, availability and price are subject to change without notice.