

Emails can be sent directly from the Riata™ CRM customer record if Microsoft Outlook® is installed or if there is access to an Internet (SMTP) Mail Server. Email settings are specific for each user and are maintained in the User Settings utility. The email client needs to be turned on (Outlook or SMTP) for each user in the user settings procedure (see page 4). The Outlook interface guide starts at the bottom of this page, after the first section below that explains the SMTP set up.

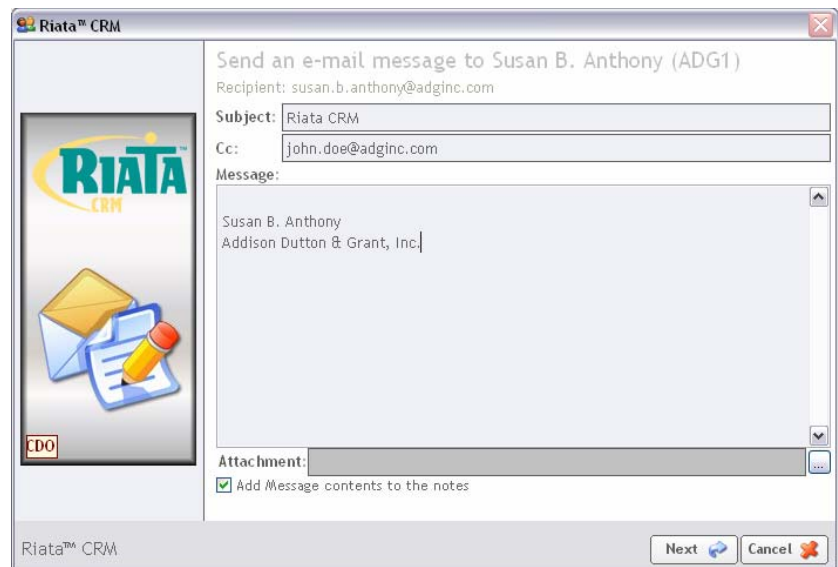
General: Riata CRM has an Email field that can be filled in on every Primary and Additional customer record. If linked to an accounting system, this is the email address already entered into that system. To the right of this field is the Email icon. By clicking this e-mail button, Riata will display a blank email screen with the mail address stored in the Email field already in place.



If using SMTP: an email form similar to this will be displayed. To send the Email, fill in a subject and a message. Attachment can be sent through the SMTP email.

If you would like a copy of the email text saved into your contact notes, make sure that the "Add Message contents" box is checked. Click on Next to send the email.

A dialog will be displayed after an email has been sent indicating whether or not your email was successfully deployed.



Outlook 2000 or Higher is Required

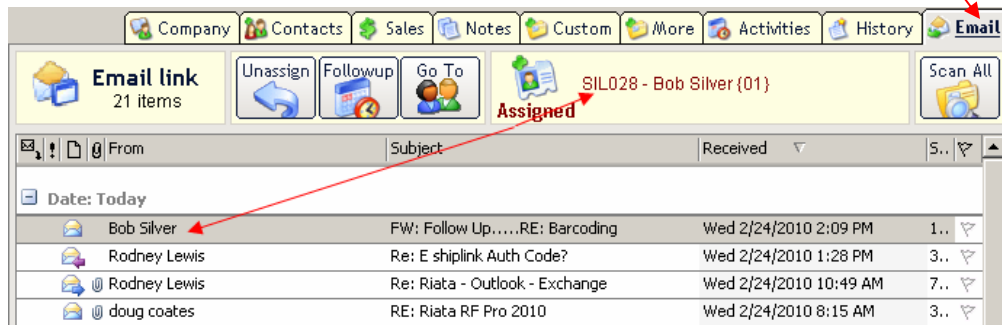
The Riata CRM - Outlook interface requires a full Outlook system installation on a client workstation, if a LAN network, or an Exchange server installation for a WAN network environment.

NOTE: Outlook must be running prior to logging in to Riata and closed after logging out of Riata to assure accurate email synchronization with customer records.

The standard Outlook email screen will be displayed when the icon to the right of the email address field is clicked. The "To": field in Outlook will be populated with the contact's email address. Because Riata uses Outlook, all of the normal email editing tools are available when creating an email, including the ability to CC and BCC different email addresses. The email will be saved in your Outlook Sent Folder as well as a note in the Riata customer record if your email user setting is turned on to "Synchronize Outbound Emails". The CC and BCC email addresses will also be included in Riata notes provided those copied email addresses are registered in a Riata customer record. Conversely, if the "Synchronize Inbound Emails" is turned on in your Riata CRM user profile, then emails that pass into your Outlook In Box will be copied as a note to the corresponding contact in Riata, provided the email address is correctly entered in the contact record. Emails can be deployed from either Riata or Outlook. The contents will eventually synchronize and flow to the notepad area of the Riata customer record. Set the Sensitivity option in an email to Personal, Private or Confidential if you do not want the contents to flow into the Riata customer record.

The Outlook Email Tab in Riata

Your Outlook Inbox can be accessed via the Email tab located on the right of the home screen. See example of the Email tab is shown below. The first email is assigned to a customer record in Riata.



Emails in the list can be accessed following the same procedures as in Outlook. Right clicking on an item will display an options menu to Reply, Delete, Forward, Print, etc. Because this is your Outlook Inbox, any changes made to the items via the Email tab in Riata will be automatically reflected in your Microsoft Outlook file. For example, if you delete an email from here it is deleted from your Outlook Inbox.

With "Synchronize Inbound Emails" turned on (see page 3), the emails that have or will arrive in your Outlook Inbox will be scanned by Riata when first logging in and during the course of working in Riata. If the email address of the sender is matched to a contact record email field in Riata, then the contents of the email will be entered in the notepad of the matched customer record.

The Riata Email Tab above shows who the email is assigned to. In the sample screen display above, the highlighted email from Bob Silver shows as assigned and to customer record SIL028 in database 01. If the email address were not found in Riata, it would show as Unassigned and the Unassign button on the left side of the toolbar would say "Assign". A browse window appears when the "Assign" button is clicked showing a list of primary and additional contacts in Riata. By selecting a contact Riata will prompt you to add that email address to the contact record. If you choose yes, the email address will be added as an additional email address for that contact and future emails that come in from that address will be entered as notes for that contact. If an email address is incorrectly assigned, choose the Unassign icon. After the email is unassigned you have the option to Assign it to the correct contact for this and future emails.

If an email address is assigned, the Go To Button will take you to the company tab for the contact record associated with that email address. Also, if it's assigned, you can create a Follow-up Activity (call/meeting/task) for the selected email by clicking on the Follow up Button.

The Scan All Button will scan your entire Inbox looking for matching email addresses in Riata. Be very careful when choosing this function if you have a large number of emails in your Inbox. Use this option when first turning on the link to Outlook or if there are missing customer notepad entries for various emails. This procedure should only be used periodically to update email assignments.

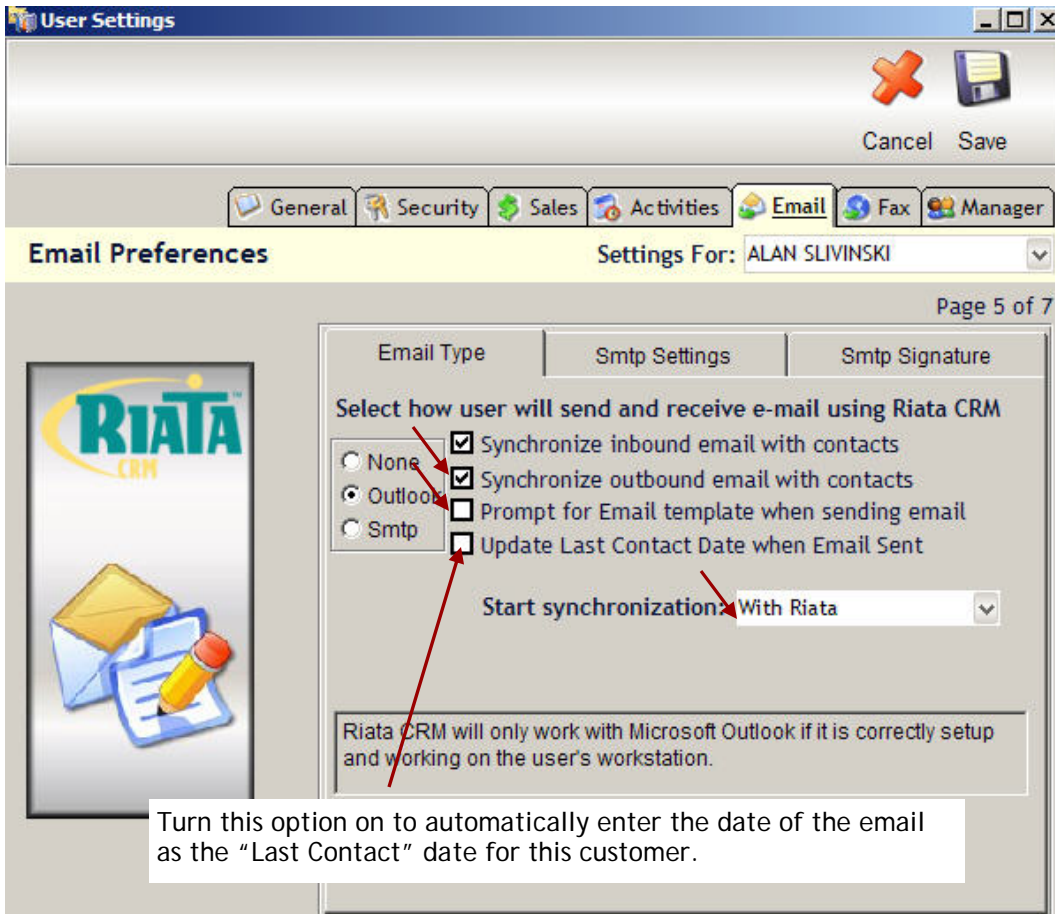
Note: *If you are synchronizing inbound and/or outbound emails with Outlook: to prevent the contents of the email from being displayed in the Customer notepad set the Sensitivity to Personal, Private or Confidential in the "Options" tab of the email.*

Riata and Outlook With Multiple Profiles

Outlook ties a specific profile to a given workstation user. Therefore, the profile Outlook will use is dependent upon who logs on to a workstation or into a Terminal Server or Citrix environment, assuming a default profile is defined. Outlook will prompt to select the correct profile to use as it attempts to load from within Riata in cases when a user has Outlook set up with multiple profiles on the server without a "default" profile. The Riata email synchronizations and email assignments require a properly defined user default profile to work correctly.

Riata CRM - Outlook User Settings

See the Riata user settings screen below. Outlook is the selected email client. Either or both synchronize inbound and outbound email toggles can be turned on. Note that the *Start Synchronization "With Riata"* must be turned on for the synchronization utilities to work properly.



Advanced Users / Settings - Do NOT change or attempt to change the registry settings unless you are proficient with the Windows Registry and have a complete backup. These settings are for IT professionals only. Below is an example of the Riata Outlook synchronization settings in the user's registry.

