

Customer emails can be deployed from the Riata™ CRM customer record through Simple Mail Transfer Protocol (SMTP). This methodology is useful as an alternative to Microsoft Outlook®.

Open the Tools Menu: Maintain Users. Select the proper user name in the “Settings For” menu field. Click the Email tab, click Edit in the upper left corner. Turn on the SMTP option. Do not select any other options.

Select how user will send and receive e-mail using Riata CRM

None

Outlook

Smtp

Synchronize inbound email with contacts

Synchronize outbound email with contacts

Prompt for Email template when sending email

Update Last Contact Date when Email Sent

Open the SMTP Settings tab. Enter data in the four settings fields exactly as entered in the user’s regular email program.

SMTP Settings - For Non-Outlook Use Only

Email Address: ads@rbsolution.com

Smtp Host: smtp.rbsolution.com

User Id: ads@rbsolution.com

Password: *****

E-mail Accounts

Internet E-mail Settings (POP3)

Each of these settings are required to get your e-mail account working.

User Information

Your Name: ads@rbsolution.com

Email Address: ads@rbsolution.com

Server Information

Incoming mail server (POP3): mail.rbsolution.com

Outgoing mail server (SMTP): smtp.rbsolution.com

Logon Information

User Name: ads@rbsolution.com

Password: *****

Remember password

Test Settings

After filling out the information on this screen, we recommend you test your account by clicking the button below. (Requires network connection)

Test Account Settings ...

Option: open the SMTP Signature tab to enter a default name and information that will appear in emails sent from Riata CRM.

Note: a customer email must be deployed from the Riata CRM record to have the contents entered and stored in the customer’s notepad.

An email screen will appear as shown on the next page.

Fill in Subject, cc if needed, then enter email message copy. 1) An attachment can be added by clicking the browse button to the right of the attachment field. 2) Verify that the “Add Message contents to the notes” option is turned on. Click the “Next” button to send the email.

Send an e-mail message to Al Slivinski (RET002)
 Recipient: ads@rbsolution.com

Subject: SMTP Test

Cc:

Message:
 This is a test of the Riata CRM SMTP email system. |
 User Name

Attachment:

Add Message contents to the notes

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The screen below will appear when the email is successfully deployed. The customer notepad is updated with the message contents as highlighted in yellow. Click the “OK” button to close the email utility and return to the Riata CRM customer record screen.

Customer Frontline

Send Mail
 Mail has been sent to Al Slivinski
 <ads@rbsolution.com>

Date / Time	User	Description
11/5/2010 11:14:52 AM	GTEP	E-mail sent - SMTP Test This is a test of the Riata CRM SMTP email system. User Name

Emails received from the customer can be added to this record through the copy (Ctrl-C) and paste (Ctrl-V) routine: highlight and copy the text of an email, then open a notepad entry screen to paste in the copy.