

# Pivotal CRM

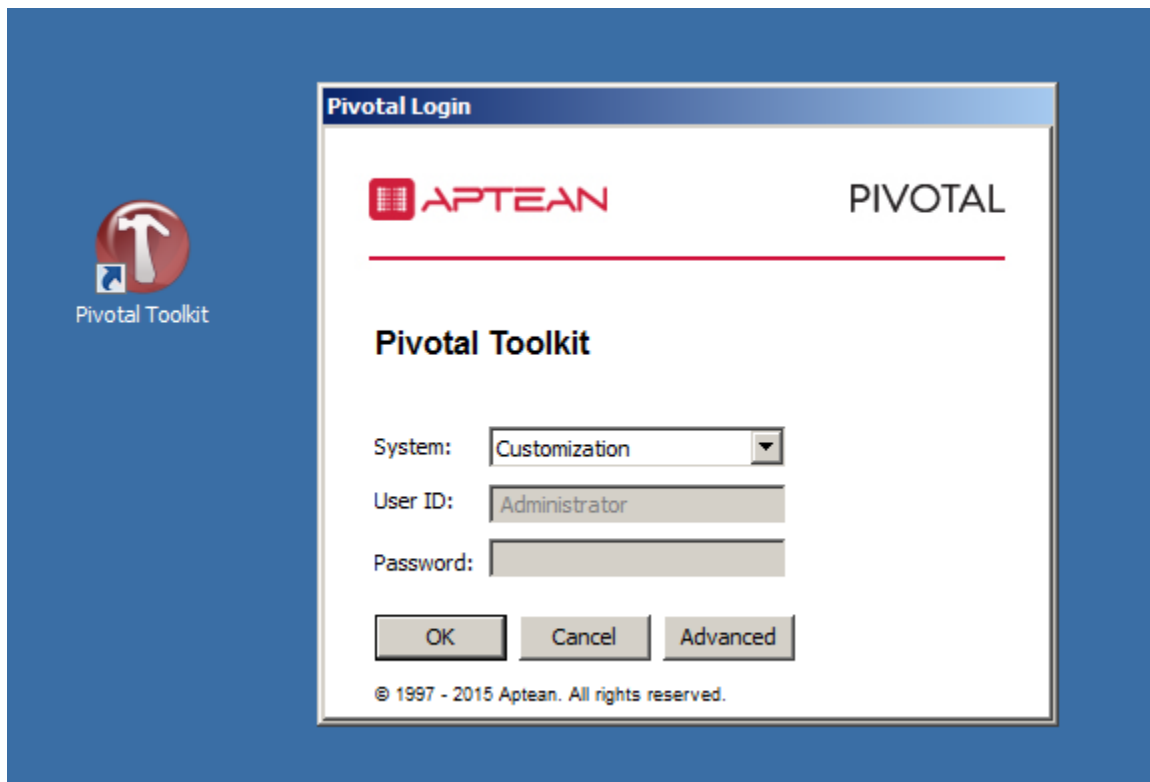
## AvaTax Connector Installation

---

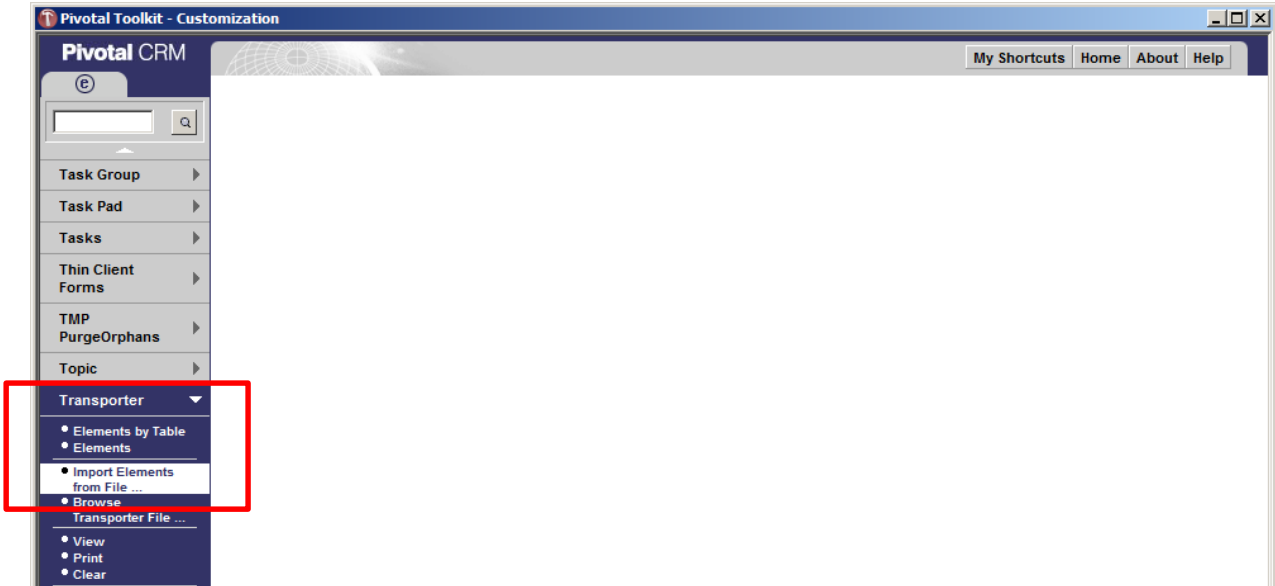
### Pivotal Toolkit

#### Step 1. Transporter

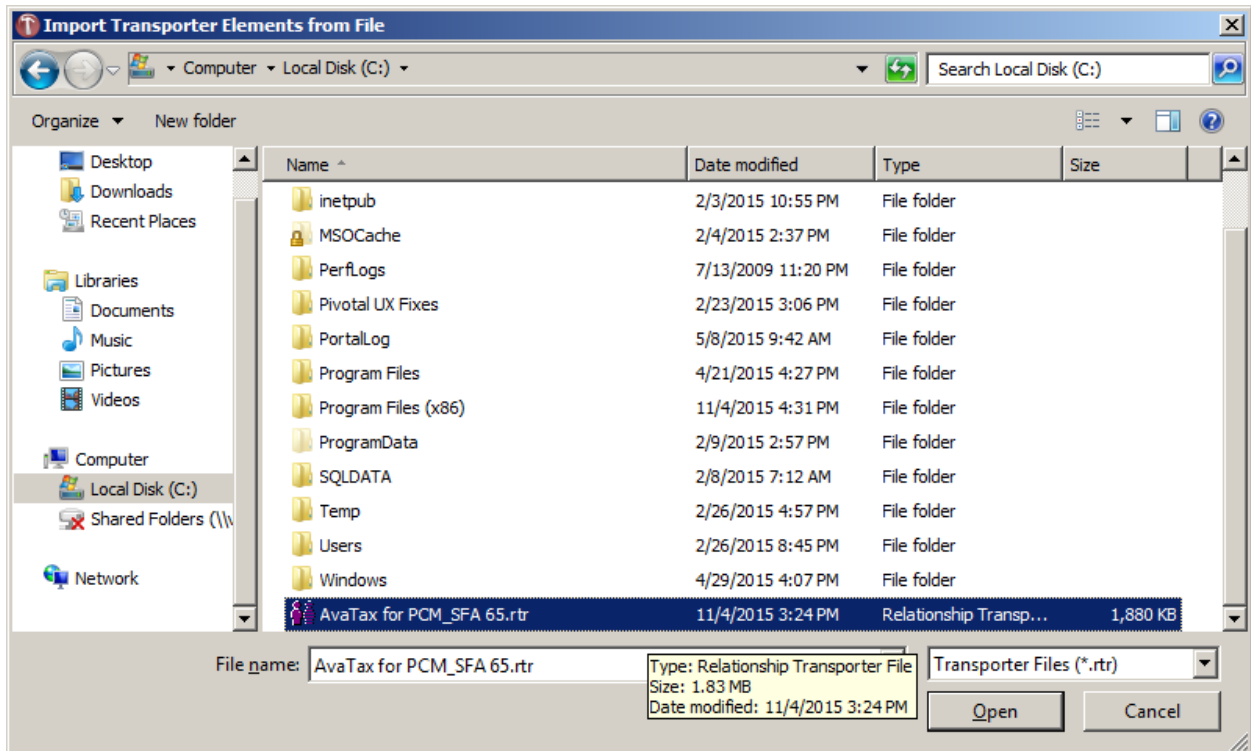
Launch your Pivotal Toolkit selecting your Customization system.



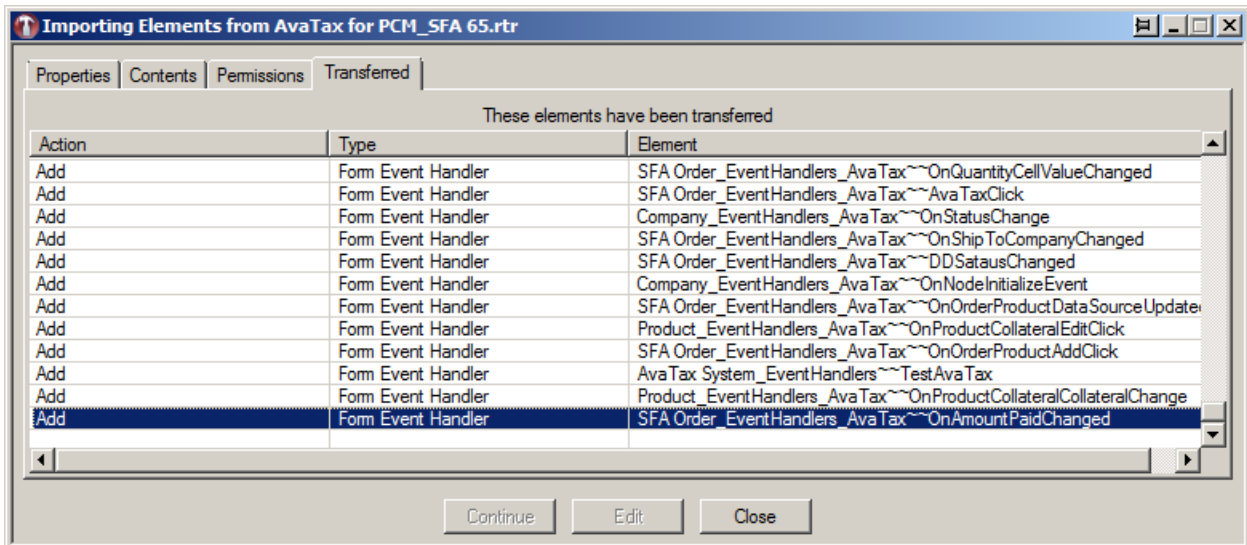
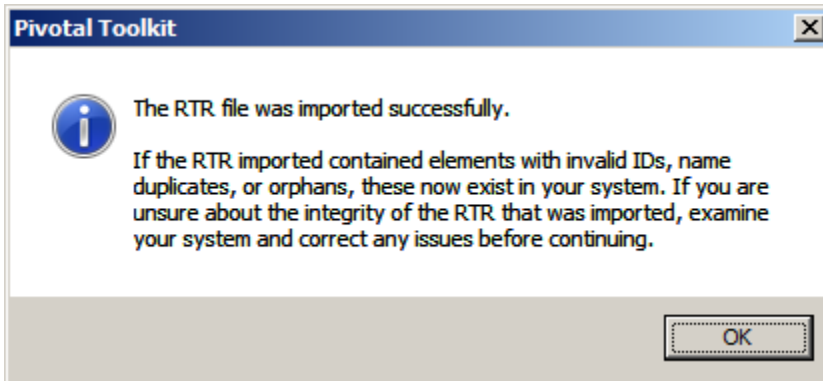
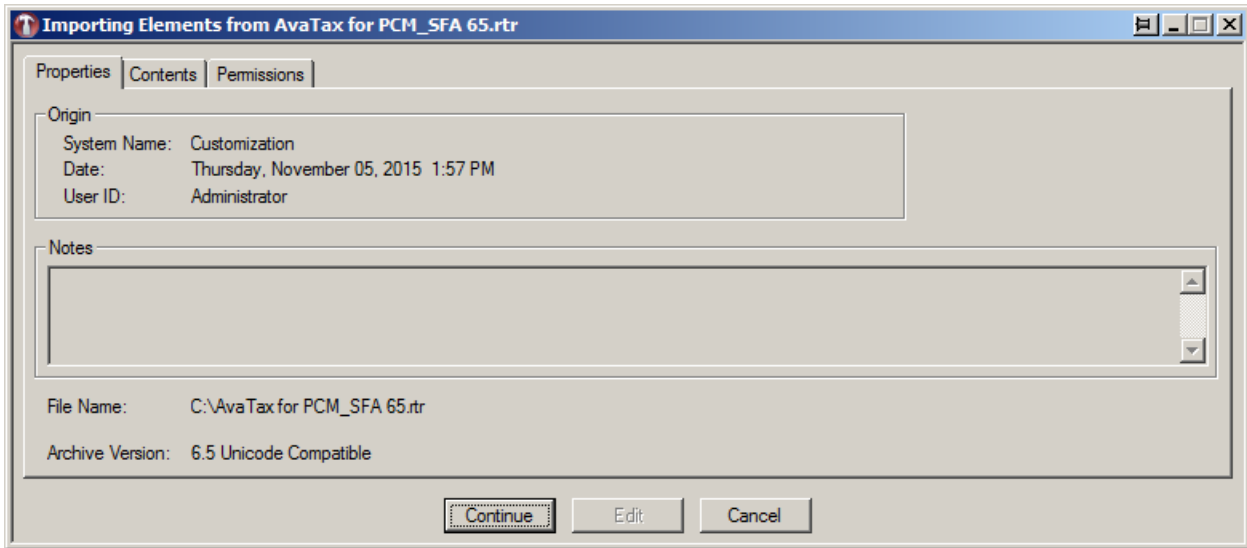
From the Toolkit screen, scroll down to the Transporter menu and select the “Import Elements from File” option.



Using the file browser locate the AvaTax .RTR transporter file that was provided for your system version.



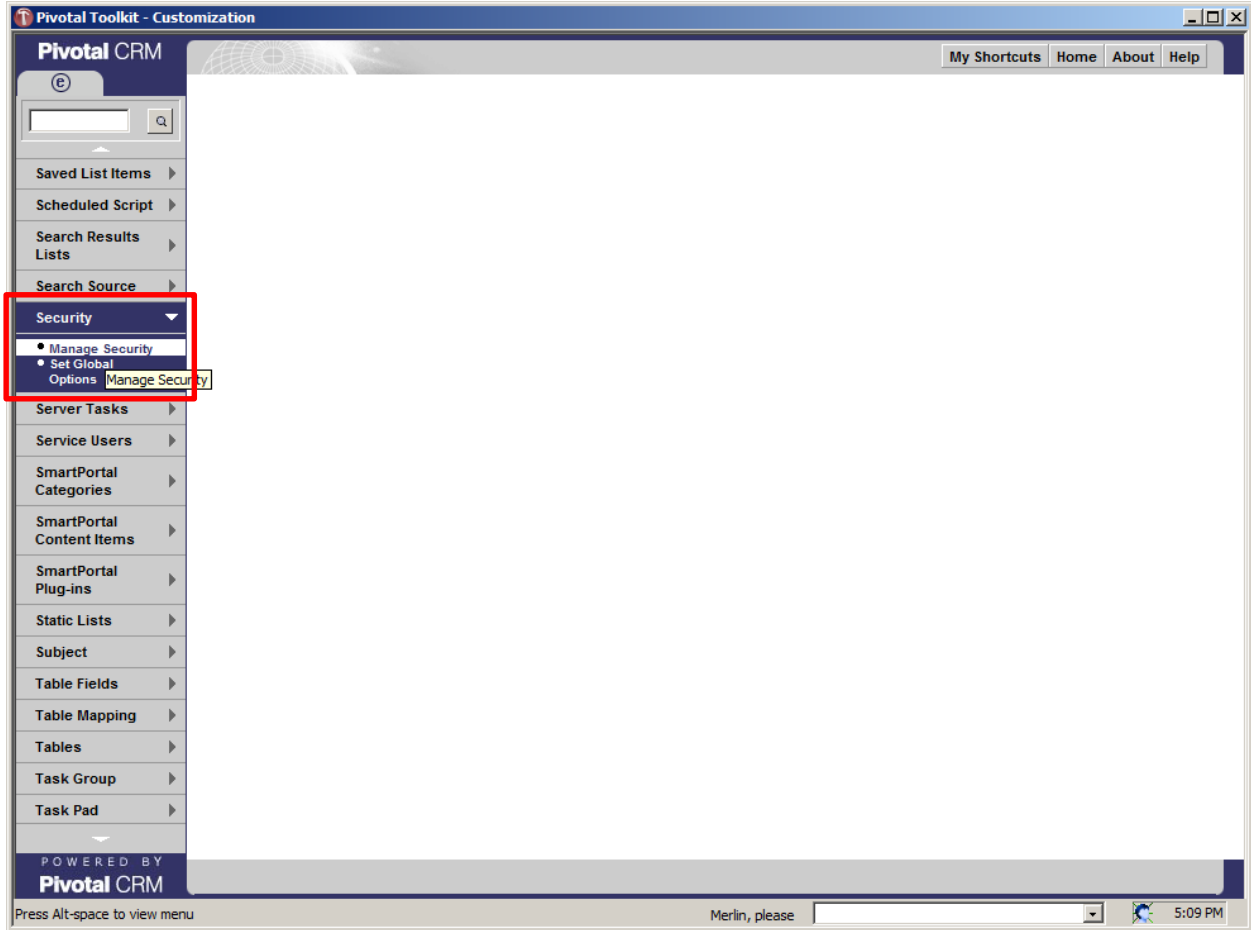
The following are the screens will see when importing the AvaTax transport file.



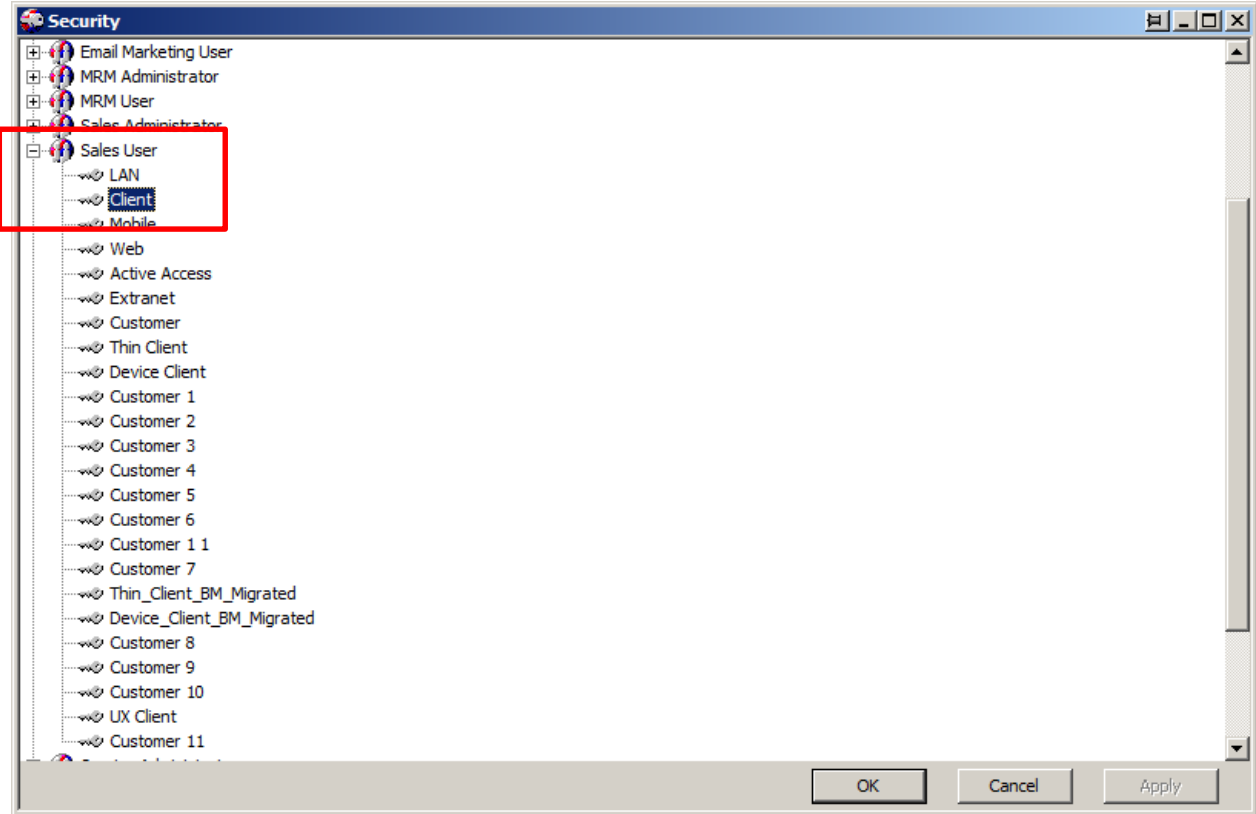
## Step 2. Security

After you have successfully imported the new elements into your Pivotal Business Module you will need to set the security access. This can vary from each Pivotal system as the security configuration is controlled by customer needs. The following screens show setting the security on a standard Pivotal 6.5 demo system running PCM and SFA.

From the Toolkit screen, scroll down to the Security menu and select the “Manage Security”



For this example we are going to set the security under the “Sales User” security group. The AvaTax Connector currently only works under the Pivotal Smart Client, so we will only set the security on the “Client” setting.



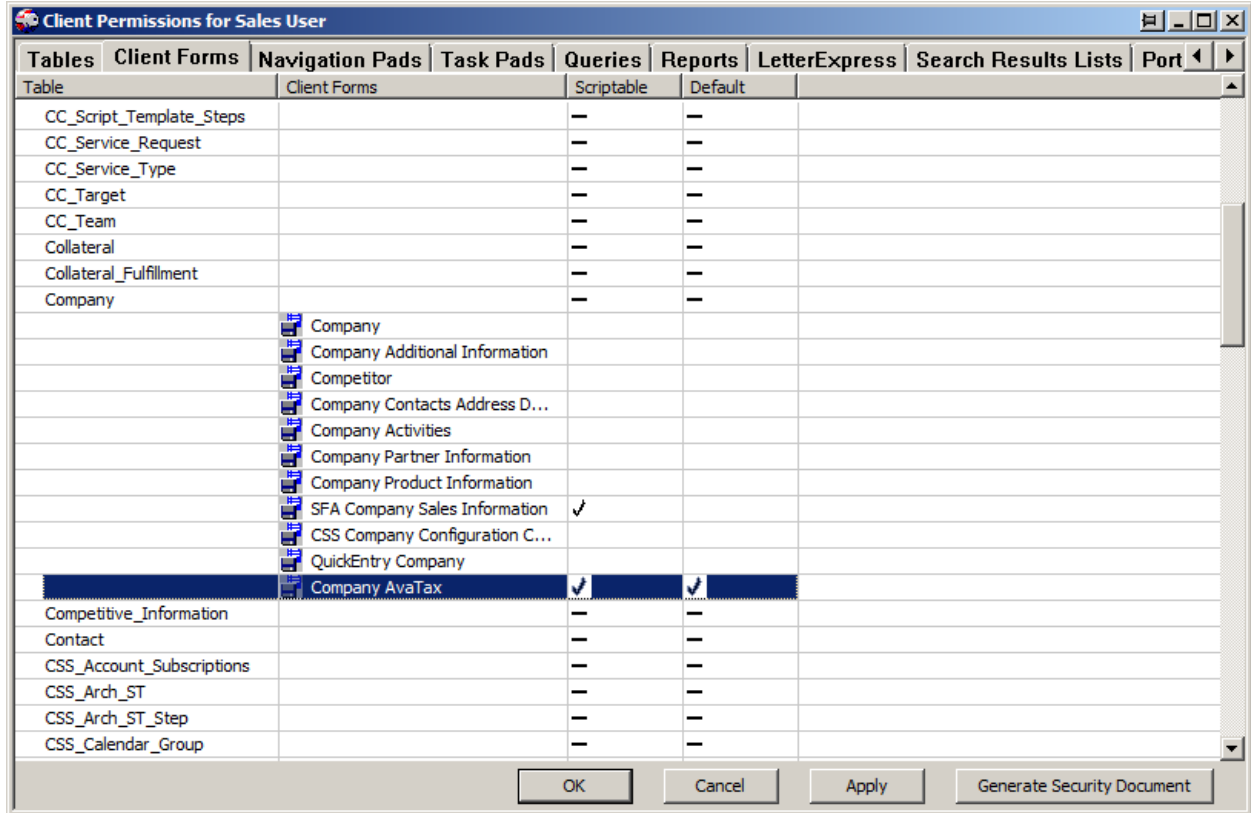
Under the “Tables” tab you will need to set security to the 3 new AvaTax tables.

Table	Create	Read	Modify	Delete	View Filter	Sync Filter	Quick Search	Global Search
Action_Object_Permissi...							✓	
Alert							✓	
Alt_Address							✓	
Alt_Email							✓	
Alt_Phone							✓	
Attachment_	✓	✓	✓	✓				
Audit_Tables							✓	
<b>AvaTax_Product_Code</b>	✓	✓	✓	✓			✓	✓
<b>AvaTax_System</b>	✓	✓	✓	✓			✓	✓
<b>AvaTax_System_Nexus</b>	✓	✓	✓	✓			✓	✓
AWM_Entity_Config							✓	
AWM_External_URL							✓	
AWM_Template_Step_I...							✓	
AWM_Workflow							✓	
AWM_Workflow_Map							✓	
AWM_Workflow_Step							✓	
AWM_Workflow_Step_I...							✓	
AWM_Workflow_Template							✓	
AWM_Workflow_Templa...							✓	
AWM_Workflow_Templa...							✓	
Call_							✓	
Call_Plan							✓	
Call_Plan_Schedule							✓	
Call_Plan_Template							✓	

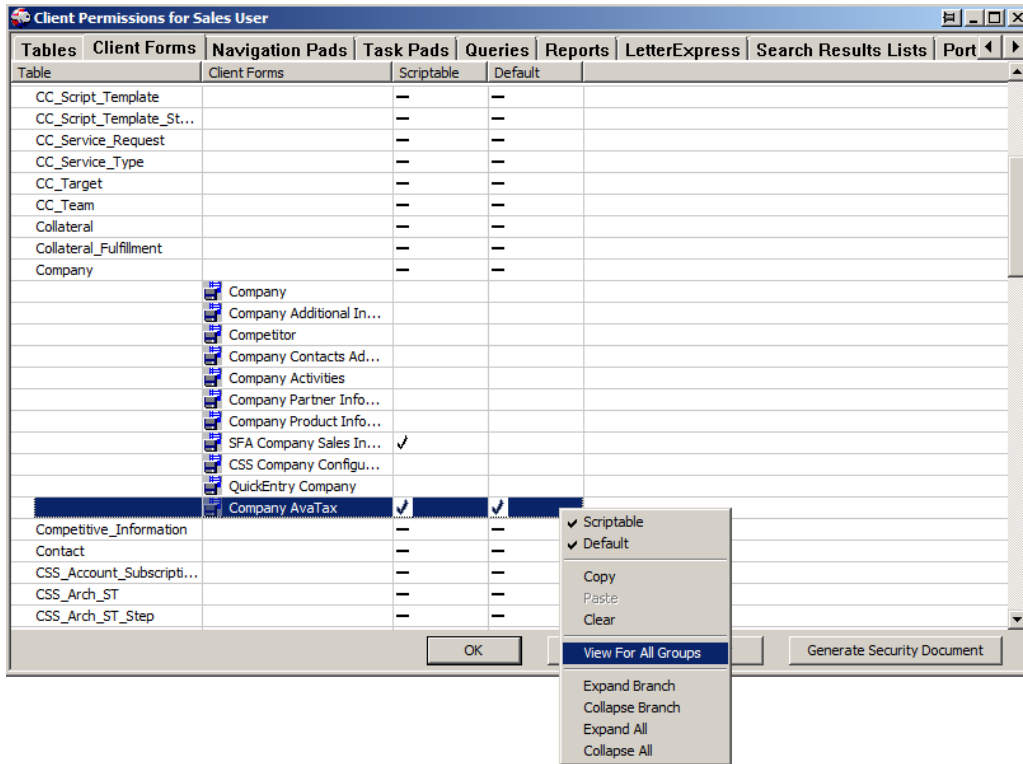
Under the “Client Forms” tab you will need to set security to the 2 new AvaTax client forms that support the new tables.

Table	Client Forms	Scriptable	Default
Alert		--	--
AvaTax_Product_Code		--	--
<b>AvaTax_Product_Code</b>	✓	✓	✓
AvaTax_System		--	--
<b>AvaTax System</b>	✓	✓	✓
AWM_External_URL		--	--
AWM_Workflow		--	--
AWM_Workflow_Step		--	--
AWM_Workflow_Template		--	--
AWM_Workflow_Templa...		--	--
Call_		--	--
Call_Plan		--	--
Call_Plan_Schedule		--	--
Call_Plan_Template		--	--
Call_Plan_Template_Step		--	--
CC_Proxy		--	--
CC_Scheduled_Calls		--	--
CC_Script_Template		--	--
CC_Script_Template_St...		--	--
CC_Service_Request		--	--
CC_Service_Type		--	--
CC_Target		--	--
CC_Team		--	--
Collateral		--	--
Collateral_Fulfillment		--	--

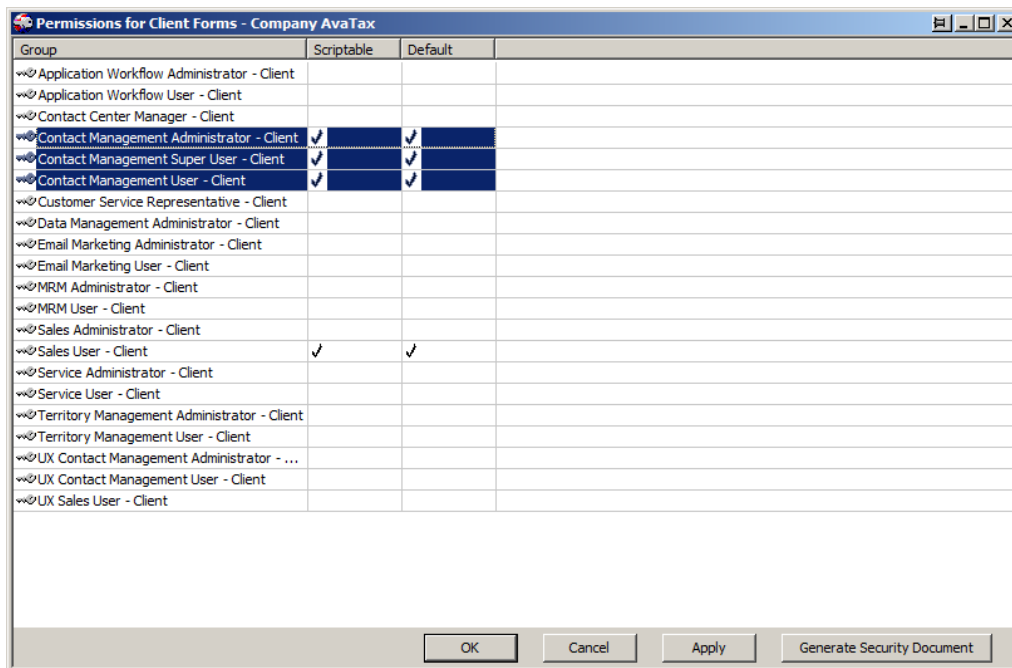
Also under the “Client Forms” you will need either use the new “Company AvaTax” client form, making it your default form when accessing the company screen. Or will need to add the 2 new AvaTax fields that was added to the company table to your customized form. There is no client or server tasks coding for this client form so just adding the fields to your custom form is all you need to do.



After setting security for the Sales User group, check the security for the other groups by right clicking and selecting the “View For All Groups”.



On this example I am going to change the Default company form for all 3 contact management security groups to ensure the new “Company AvaTax” client form is used.





Like with the Customer client form there is a new Product client form as well. Here to you will need either use the new “Product AvaTax” client form, making it your default form when accessing the product screen. Or will need to add the 1 new AvaTax fields that was added to the product table to your customized form. There is no client or server tasks coding for this client form so just adding the fields to your custom form is all you need to do. You will also want to check the other security groups making this client form the default.

Table	Client Forms	Scriptable	Default
MRM_Expense_Detail		--	--
MRM_Expense_Period		--	--
MRM_Project		--	--
Note_		--	--
Office		--	--
Product		--	--
	Product		
	SFA Product	✓	
	Product Customer		
	SFA Product Package		
	<b>Product AvaTax</b>	<b>✓</b>	<b>✓</b>
Relationship		--	--
Relationship_Role		--	--
Relationship_Set		--	--
Relationship_Type		--	--
Rn_Int_MailMerge		--	--
Rn_Interactions		--	--
Rn_Interactions_Proxy		--	--
SFA_Currency		--	--
SFA_Forecast_Period		--	--
SFA_Lead		--	--
SFA_Milestone_Template		--	--
SFA_Milestone_Template_Step		--	--
SFA_Opportunity		--	--
SFA_Opportunity_Milestone		--	--

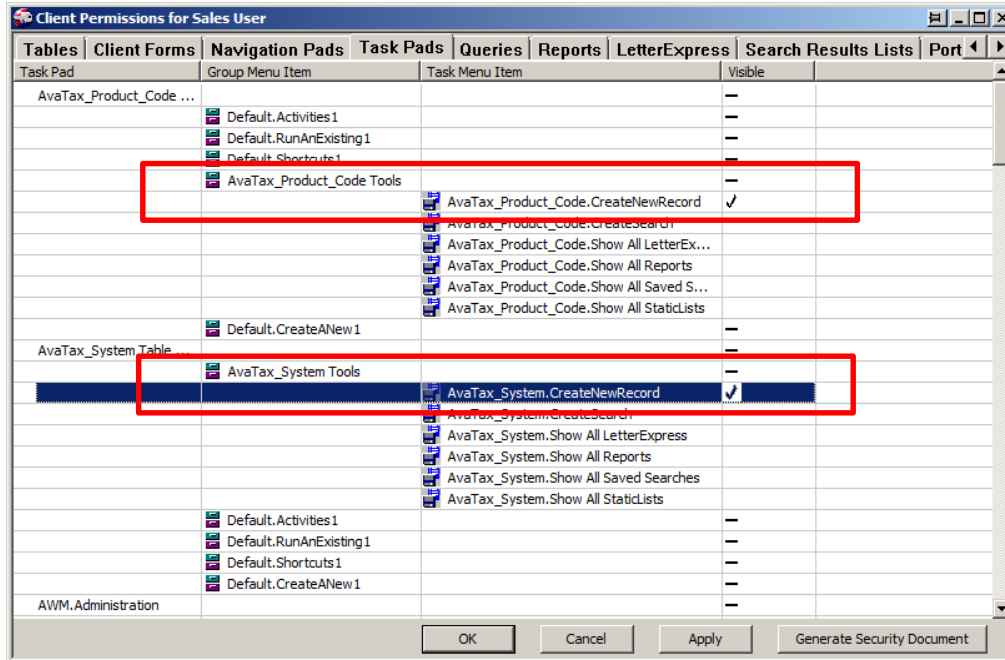
Buttons: OK, Cancel, Apply, Generate Security Document

A new version of SFA Order client form also has been added. Unlike the company and product this client form does reference new client and server tasks. So if you are using a customized SFA Order form you will need to consult with us on getting your client form updated. For this example we will set the security to the new SFA Order AvaTax form as well as checking the order security groups.

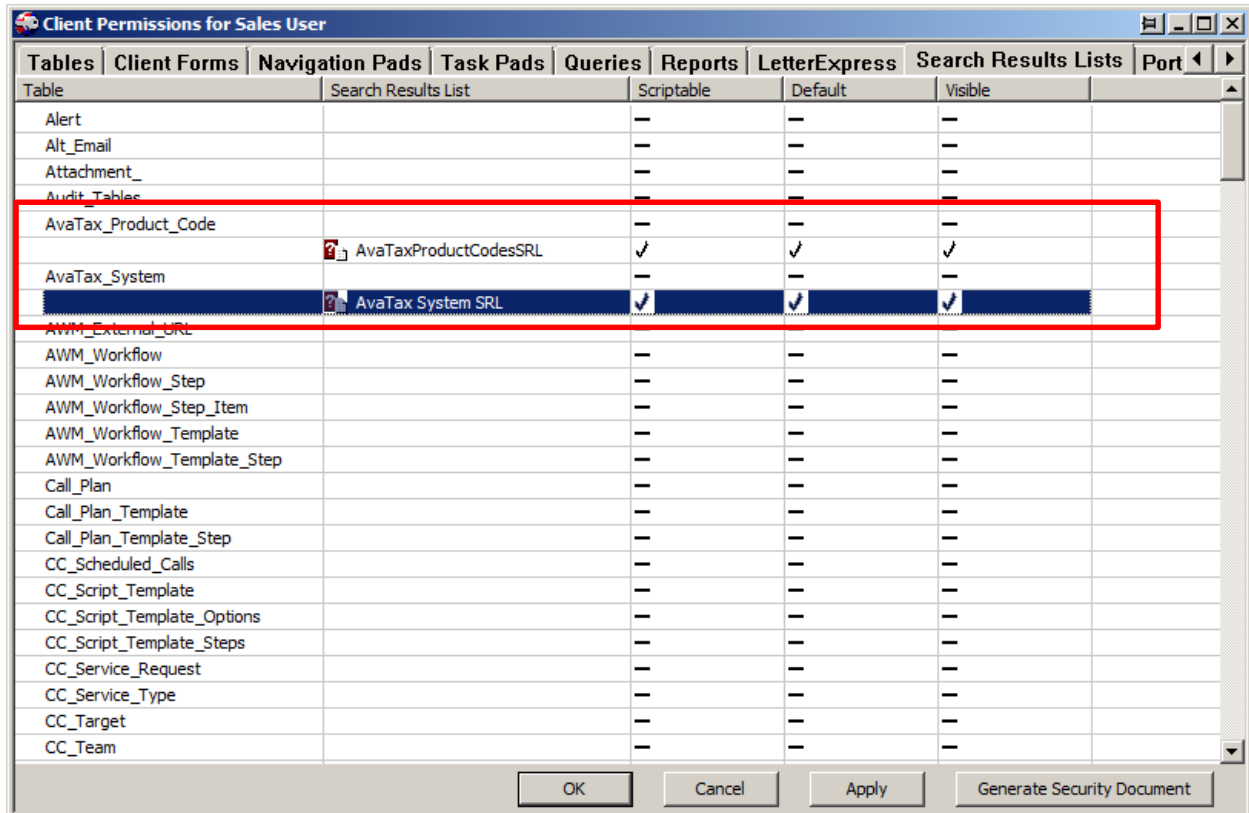
Table	Client Forms	Scriptable	Default
Relationship		—	—
Relationship_Role		—	—
Relationship_Set		—	—
Relationship_Type		—	—
Rn_Int_MailMerge		—	—
Rn_Interactions		—	—
Rn_Interactions_Proxy		—	—
SFA_Currency		—	—
SFA_Forecast_Period		—	—
SFA_Lead		—	—
SFA_Milestone_Template		—	—
SFA_Milestone_Template_Step		—	—
SFA_Opportunity		—	—
SFA_Opportunity_Milestone		—	—
SFA_Order		—	—
SFA Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
SFA Order AvaTax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SFA_Quote		—	—
SFA_Sales_Business_Logic		—	—
System		—	—
Team_Member_Role		—	—
TM_Assignment_Job		—	—
TM_Template_Parent		—	—
TM_Territory		—	—
TM_Territory_Criterion		—	—

Buttons: OK, Cancel, Apply, Generate Security Document

Under the “Task Pads” tab you will need to set security to the 2 new AvaTax task pads. On this example we are only granting the visible security to the “CreateNewRecord” menu items.



Under the “Search Results Lists” you will need to set security to the 2 new SRL’s.



Finally under the "Server Tasks" you will need to set security to the 2 new Server Tasks.

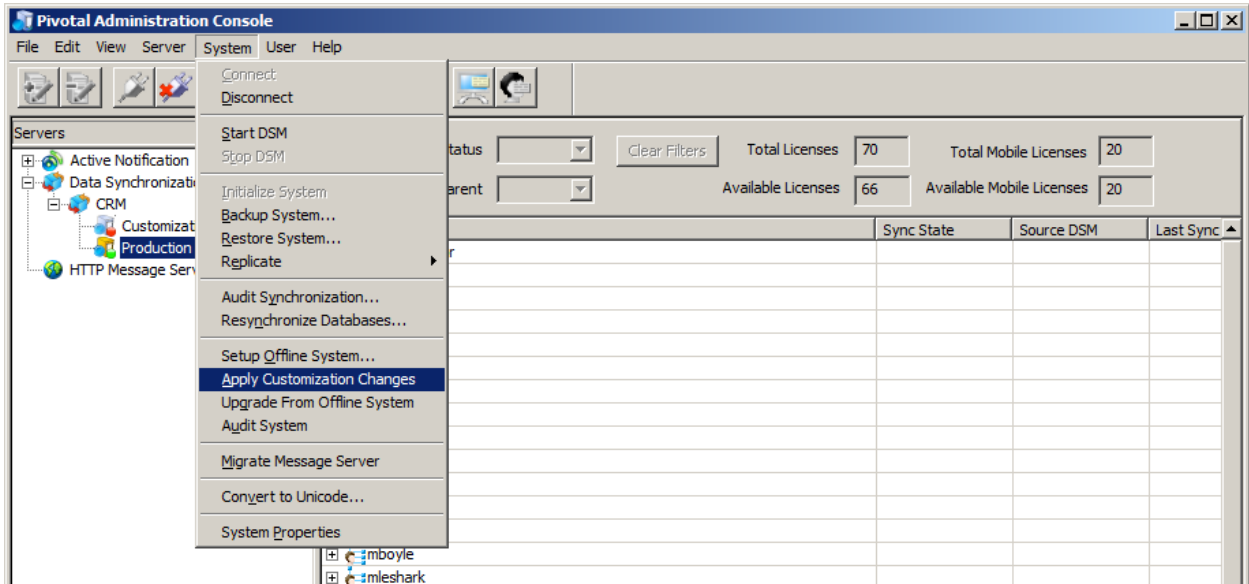
The screenshot shows a dialog box titled "Client Permissions for Sales User". It has several tabs: "Search Results Lists", "Portals", "Graphs", "Portal Items", "Active Search Pages", "Server Tasks", "Command Handlers", and "Ap". The "Server Tasks" tab is selected. Below the tabs is a table with three columns: "Server Task", "Can View Methods", and "Can Execute Methods". The table lists various server tasks, with "RCS.AvaTax.System" and "RCS.AvaTax.Tax" highlighted in blue and enclosed in a red box. The "Can View Methods" and "Can Execute Methods" columns for these two tasks contain checkmarks. At the bottom of the dialog are buttons for "OK", "Cancel", "Apply", and "Generate Security Document".

Server Task	Can View Methods	Can Execute Methods
Organization Chart		
Purge Tickle Records		
QuickEntry Company		
RCS.AvaTax.System	✓	✓
RCS.AvaTax.Tax	✓	✓
Reassign Account		
Relationship Set		
Relationship Type		
Relationships		
SFA Alert		
SFA Call Plan		
SFA Currency		
SFA Forecast Period		
SFA Forecast Screen		
SFA Lead		
SFA Opportunity		
SFA Order		
SFA Product Package		
SFA Quick Lead		
SFA Quote		
SFA Reassign Sales Account		
SFA Sales Business Logic		
SFA System		
System		
System Maintenance		

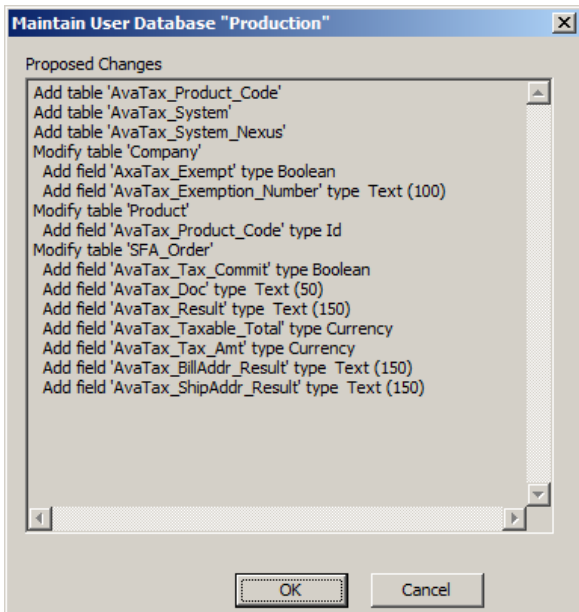
# Pivotal Administration Console

## Step 1. Apply Customization Changes

Open the Pivotal Administration Console, connect to the Pivotal system where you installed the AvaTax Connector, and from the System menu “Apply Customization Changes”.



The following screen will appear showing the new database changes. Click ok and wait for the Finish message to appear.



# Pivotal Business Server

## Step 1. Shutdown and Re-start the Pivotal Business Server.

From the Windows “Component Services” screen select the Pivotal Business Server and from the Action menu select the Shutdown option and wait until the ball stops rotating on the icon. Close the “Component Services” screen and launch the Pivotal CRM client which will automatically re-start the Pivotal Business Server.

