POTA SOFTWARE | PACKAGES & CUSTOMER DESIGN

System Manual for CR7E

POTA Customer Relationship Management System(CR7E)

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Chapter

1

1. Introduction

POTA Technologies Ltd. has been established in 1992, and we have more than 20 years experience in producing software packages and customer design.

Our Team

The designers have been trained their skills and knowledge in the U.S., UK, and Mainland China with related degrees such as Computer Science, Marketing, Publishing etc. Every designer has more than 10 years experience.

Our aim is to provide you - wherever you are and in whatever kind of division- with the sort of friendly products and personal support that you need.

Understanding the Trial Period

The free trial Period for CR7E is up to 9 months. After the free trial, you can continue your service by buying the full version at POTA Software's website (http://en.potasoft.com/). Your free trial countdown will begin after the software being installed and launched. You are able to check your free trial count down at the

Menu > Help >About the POTA Customer Relationship Management System

Get Helped

To view this manual, click
Menu > Help > Manual Download

Or visit our website (http://en.potasoft.com/) and contact us.

The Product - CR7E

Pota Customer Relationship Management System (CR7E) is a conventional, traditional, so-called on-premise/in house CRM desktop application. It is a not web-based CRM or Apple Mac CRM solution.

It can run on a single desktop or on a Client/Server network architecture. This is where you typically have a more powerful, dedicated PC acting as a Server, with the Clients, or Workstations attached or networked to it.

It is a concise and informative Customer Relationship Management System, you can view/add/edit/ the customer's detailed information in one screen, including the customer's name, address, photo, contact event records, and attached files. The CR7E is a feature-rich CRM, you can customize your own contact events, brief note, contact person, handler (in house service person) .

The best feature of the system is the **Powerful Search**: you may input your query in any field (Name, Phone, Category, Associations…) and then click “Begin to Search.” The system will return the best result which matches your query.

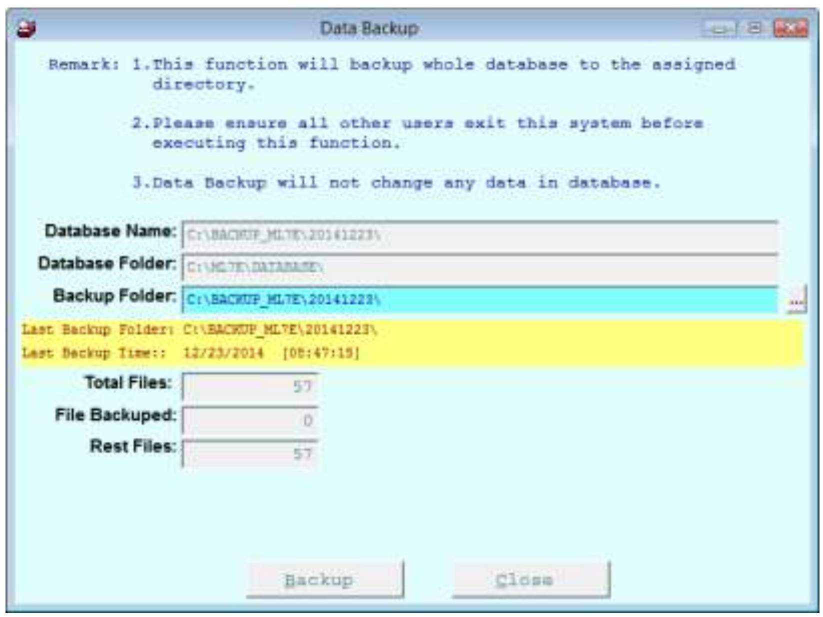
Chapter
2

2. Data administration

This chapter will demonstrate how to backup, restore, and re-index your database in the POTA Customer Relationship Management System.

Back Up Your Data

Where to:
Tools > Data backup

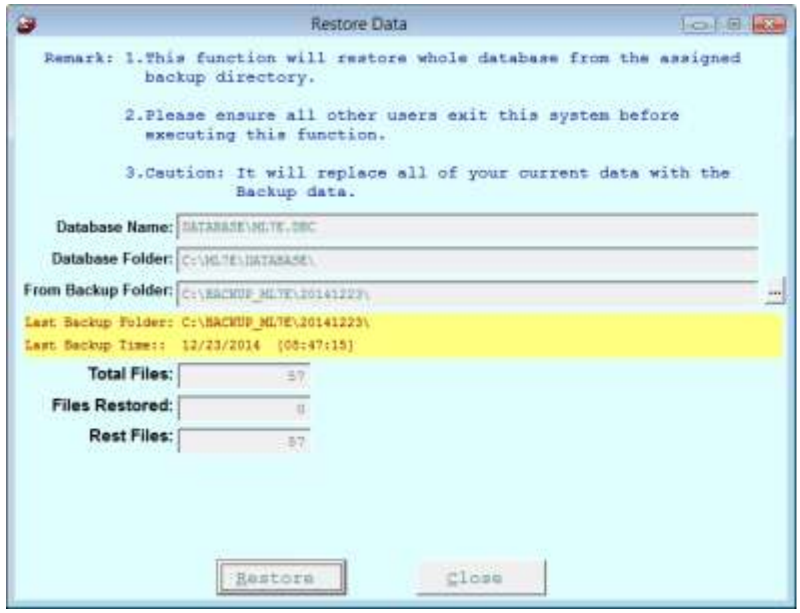


We suggest you backup your database regularly. Before executing the backup process, please ensure all users exit this system. Simply assign a directory or use default directory (C:\BACKUP_CR7E\20150428) in the Data Backup window. Click on the "Backup" button and start to back up your database.

Restore Your Data

Where to:

Tools > Restore Data



This function will restore your whole database from the assigned backup directory. Before executing restore your database, please ensure all users exit this system. Please be cautious when you decide to restore your database. **It will replace and cover ALL your current data with the backup data.** Select the directory where you store your backup data. Click on the “Restore” button and start to restore your database.

Rebuild or Re-index Your Data

Where to:

Tools > Validate and Re-index database

This function will check the database and rebuild all the indexes of the database to have optimal performance. Before executing this function, please ensure all users exit this system. To validate and re-index your database will not change the content of any existing data. Click on the “Start” button and start to validate and re-index your database.

Chapter 3

3. Customer Maintenance

CR7E is a concise and informative Customer Relationship Management System, you can have the customer's information in one screen, including the customer's detail, photo, contact event records, and attached files.

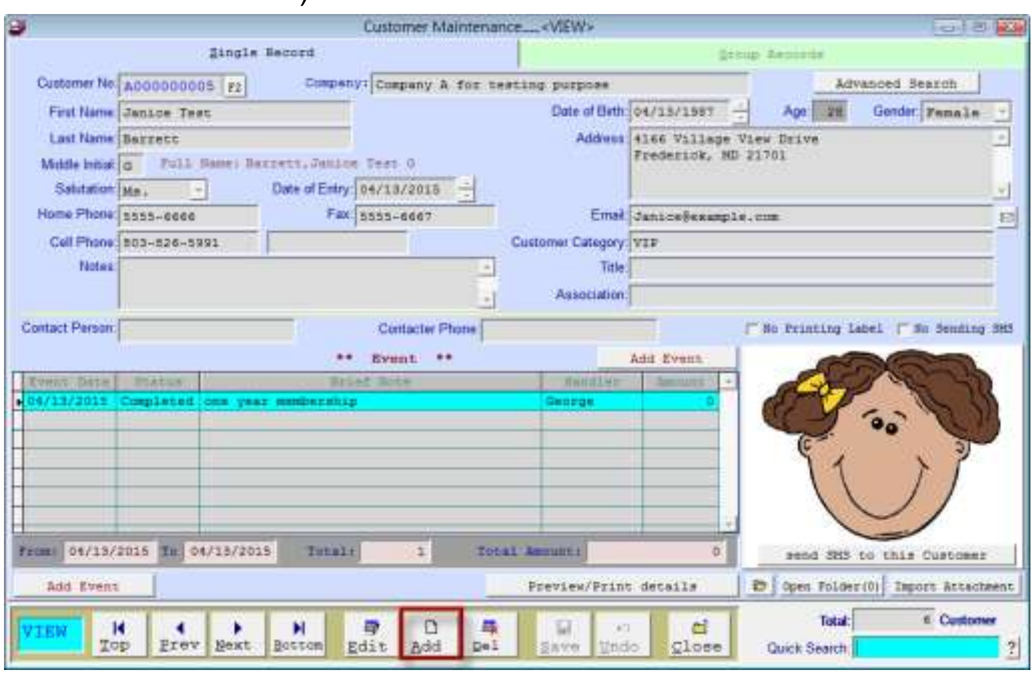
Add a new customer

Where to:

Shortcut button: Click on the customer maintenance icon on the tool bar > Add

or,

Maintenance menu > Customer maintenance > Add (down the Customer maintenance window)



In the “Add” window, feel free to fill in all the fields. Please notice that the “Customer No.” cannot be changed once you saved the data.

If you really want to change the Customer No, please go to Tools> Change Customer No. The Event Records will go with the new Customer No.
Fast Add or change Customer No:
Right click on "Add" button, you can copy current record to a new record, edit every field and save as a new customer record.

Edit/update customer data

Where to:
Maintenance menu > Customer maintenance > Edit (down the Customer maintenance window)

Shortcut button: Click on the customer maintenance icon on the tool bar > Edit

In the “Edit” window, feel free to edit or update the existed data. Click “Save” if you want to save the data; click “Undo” if you want to leave this window.

Delete a customer

Where to:
Maintenance menu > Customer maintenance > Del
Shortcut button: Click on the Customer maintenance on the tool bar > Del

View your group records and find the record(s) you want to remove. Click on the record you want to delete and click “Del” (down the group record window)

Edit Group Customer Records

Where to:

Maintenance menu > Customer maintenance > Group records tab

Shortcut button: Click on the Customer maintenance on the tool bar > Group records tab

View your group records and find the record(s) you want to remove. Click on the record you want to delete and click “Del” (down the group record window)

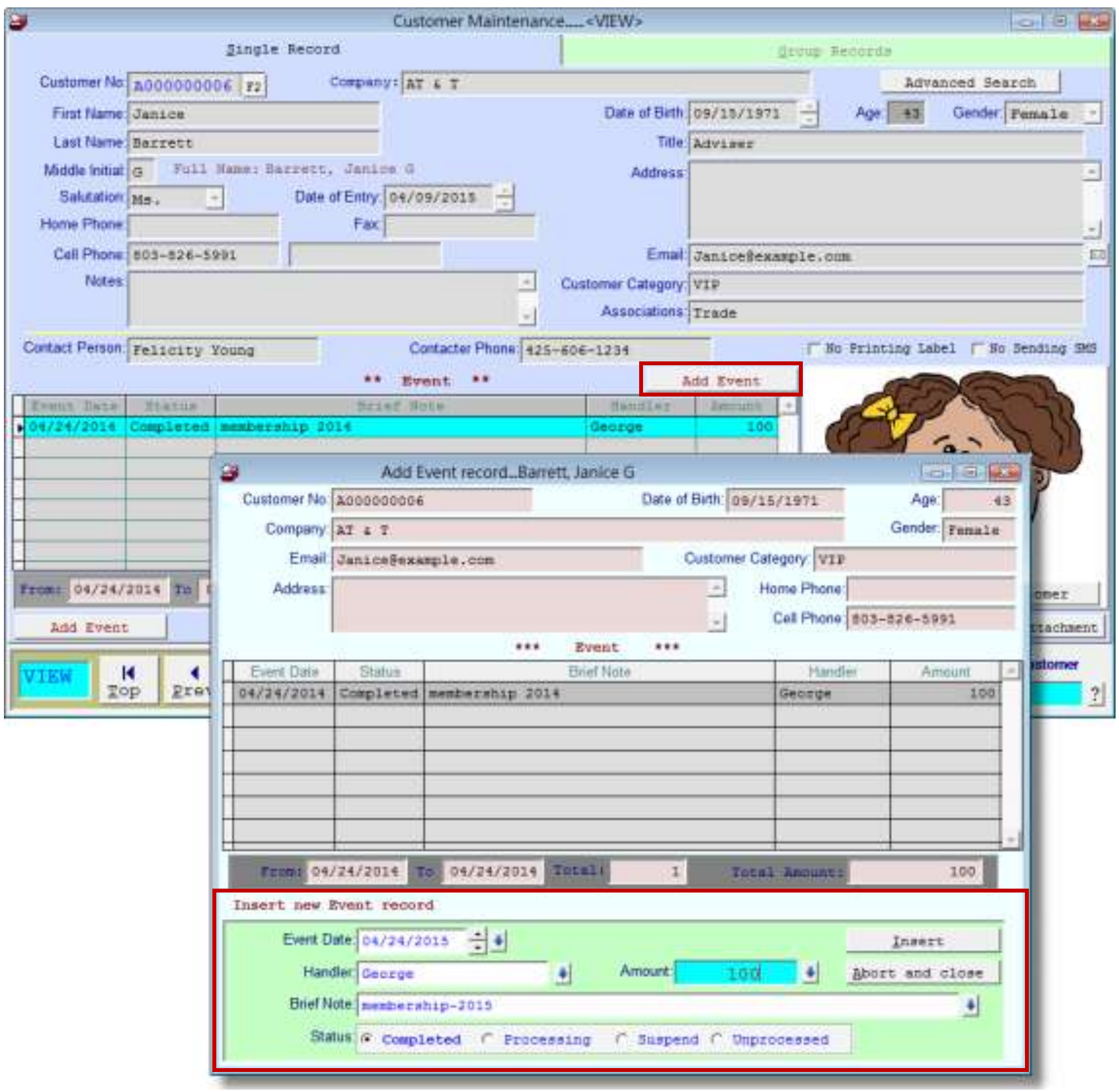
Chapter 4

4. Contact Event

Add a new Event

Where to:

Maintenance menu > Customer maintenance > Add Event



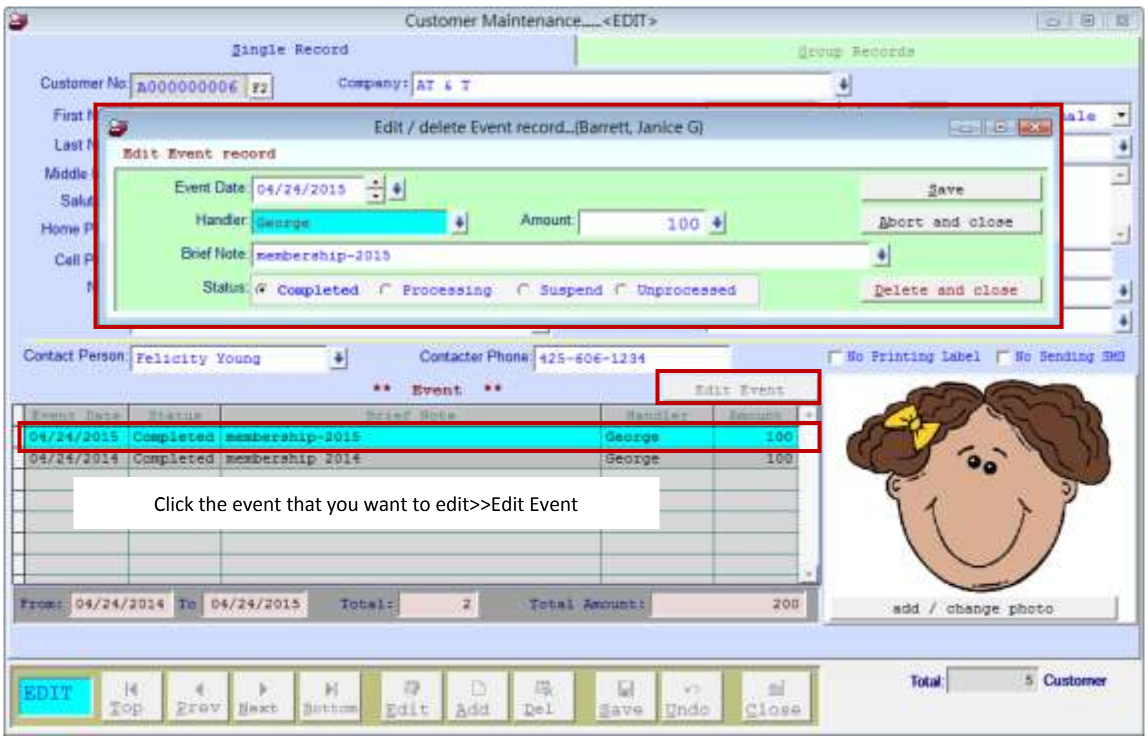
In the “Add Event Record” window, you can choose Handler, Brief Note, and input the Amount. You may input Brief Note instead of choosing from the existing data.

Click “Insert” if you want to save the event record; click “Abort and Close” if you want to leave this window.

Edit/Delete Event Records

Where to:

Maintenance menu > Customer maintenance > Edit (down the Customer maintenance window)>Select the Event by click the mouse>Edit Event



In the Edit Windows, you can change the Handler, Amount, Brief Note and Save, or you can also Delete the Event Record.

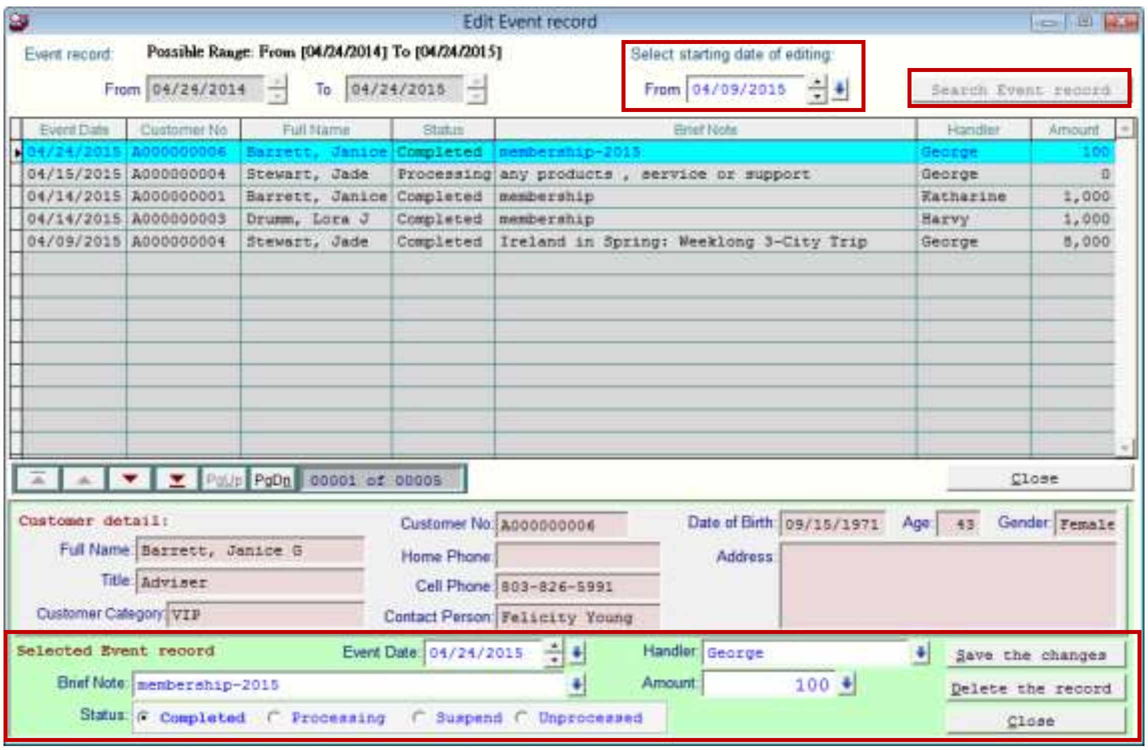
Edit/Delete Event Records - listed by date

Where to:

Maintenance menu > Edit Event Record > Select starting date of editing>Search Event record>Click the Event that you want to edit>

Select the Event by click the mouse>Edit Event

In the Edit Windows, you can change the Handler, Amount, Brief Note and then Save the change, or you can also Delete the selected Event Record.

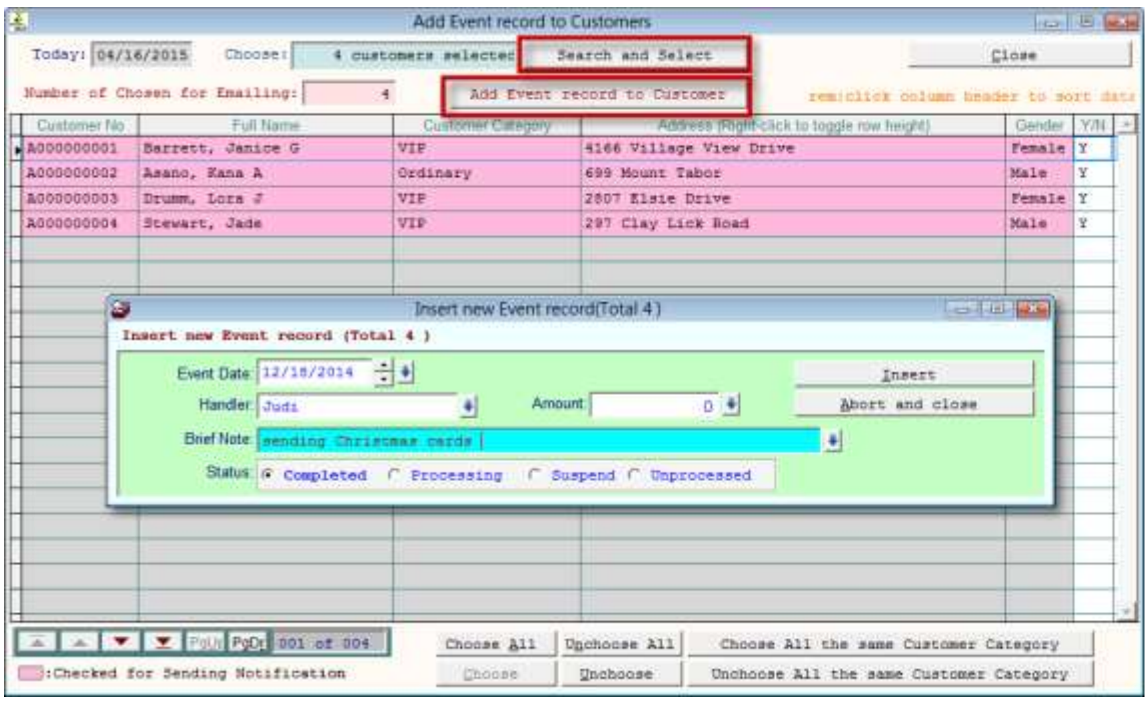


Add Event Records to Selected Customers

Where to:

Tools menu >Add Event record to Customers

In the Add Event record to Customer window, first of all, please Search and Select the customer that you want to Add Event Record. The selected customers will be listed and you can click Y/N column to choose or not choose the customer.



In the Add Event record to Customer>Edit Window, you can select the Handler, input Amount, Brief Note and Insert, or you can Abort and Close.

Chapter

5

5. Advanced Search

This chapter can help you with searching Customers within the system.

Customer Advanced Search

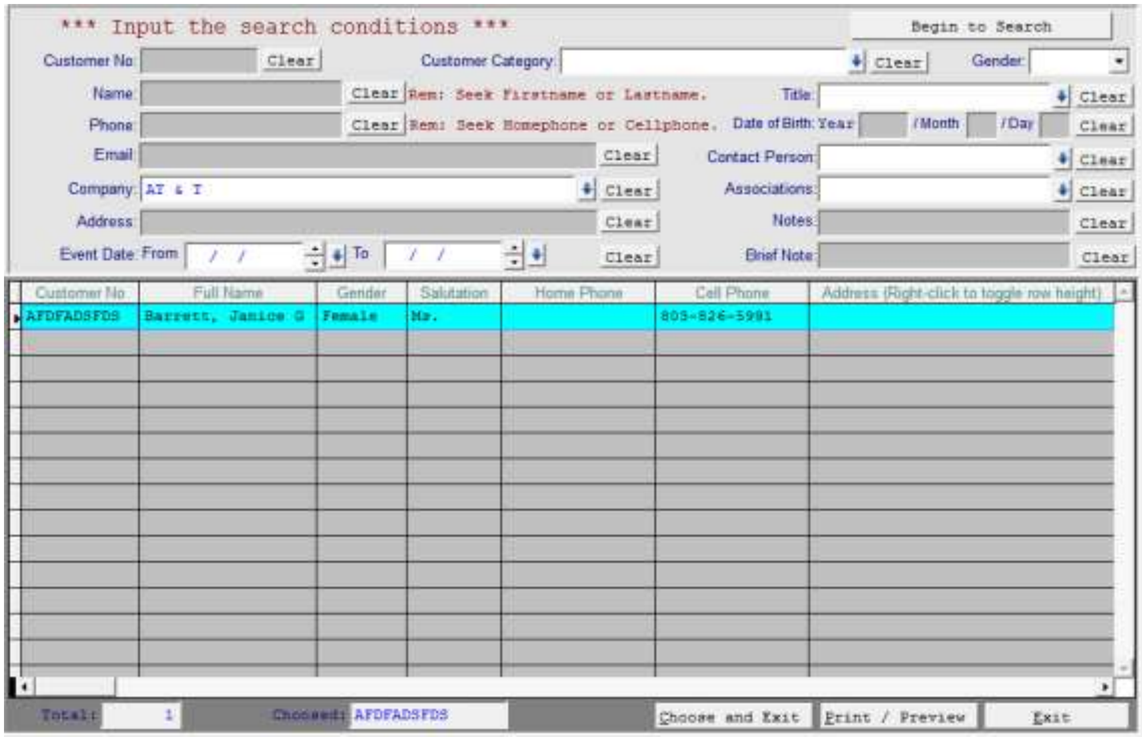
Where to:

Maintenance Menu > Customer Maintenance > Advanced Search Button (Beside the Company Field)

Shortcut button: Click on the Customer advanced search button  on the tool bar

You may input your query in any field (Name, Phone, Category, Associations…) and then click “Begin to Search.”

The system will return the best result which matches your query.

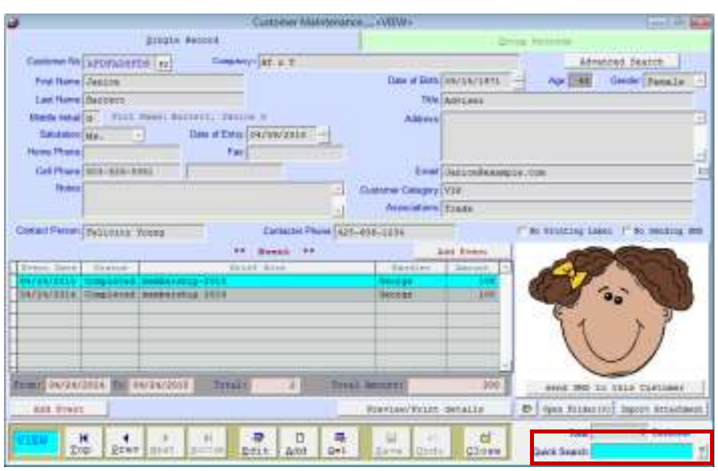


You may click one result and back to the customer maintenance screen.

Quick Search

Where to:

Maintenance menu > Customer maintenance > Quick Search (Lower right corner of the Customer maintenance window)



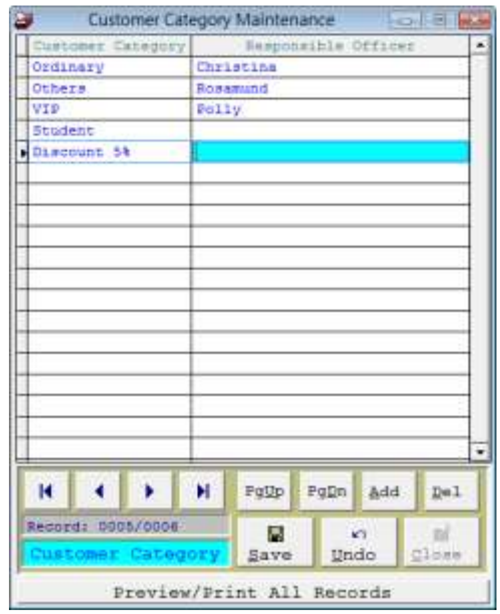
Quick Search will search the customer no, name, company, phone, and address. The system will return the best result which matches your query.

Chapter

6

6. Other Settings

Customer Category Maintenance



By setting various Customer Category, the system can help you to request the customers list/statistic reports which are under specific member group. (e.g. the VIP customers).

Where to:

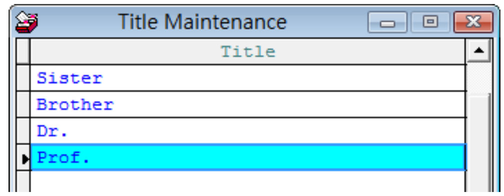
Maintenance menu > Customer Category Maintenance

In the Customer Category Maintenance window, you are able to add, delete, and edit the customer category by clicking corresponding buttons. Be sure to click “Save” button to save your setting, or the setting will not be applied.

Customer Title Maintenance

By setting various title, the system can help you to apply the title to each customer.

Where to:



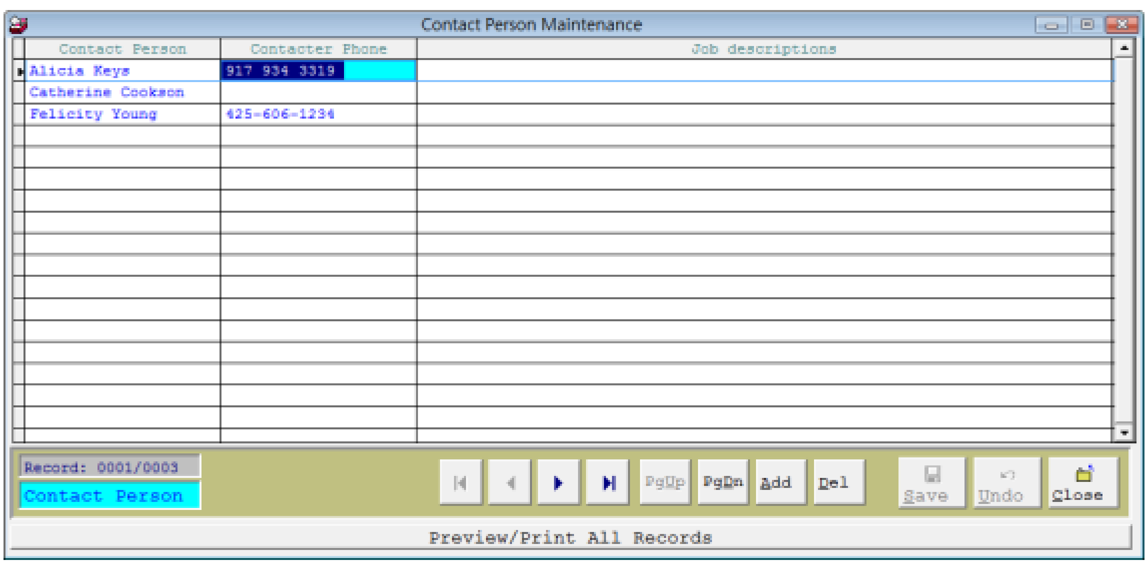
Maintenance menu > Title Maintenance

In the Title Maintenance window, you are able to add, delete, and edit the Title by clicking corresponding buttons. Be sure to click “Save” button to save your setting, or the setting will not be applied.

Contact Person Maintenance

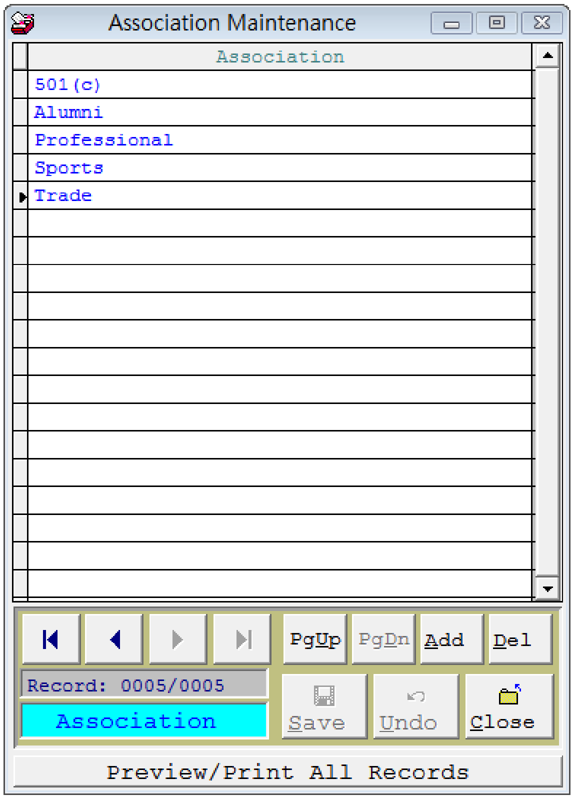
Where to:

Maintenance menu > Contact Person Maintenance



In the Contact Person Maintenance window, you will see the current contact person. Feel free to add, delete, and edit the numbers by clicking corresponding buttons.

Association Maintenance



Where to:

Maintenance menu > Association Maintenance

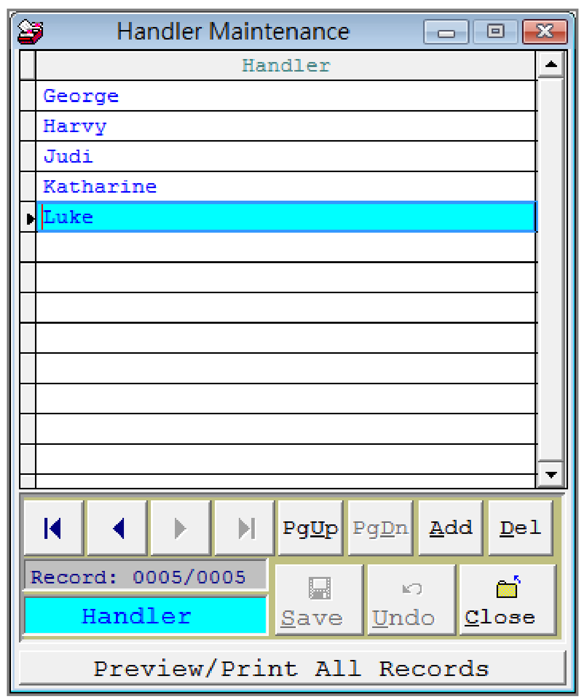
In the Association Maintenance window, you will see the sample associations. Feel free to add, delete, and edit by clicking the corresponding buttons.

Handler Maintenance

Where to:

Maintenance menu > Handlers Maintenance

In the Handler Maintenance window, you will see the sample Handlers. Feel free to add, delete, and edit by clicking the corresponding buttons.

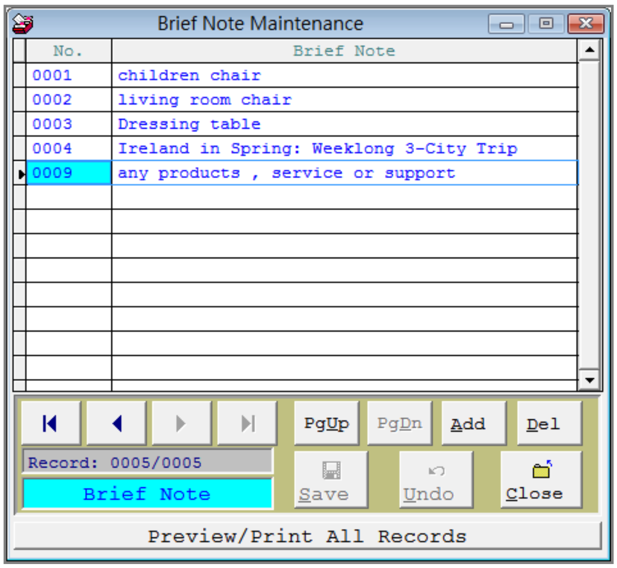


Brief Note Maintenance

In the Brief Note Maintenance, you are able to set up the Brief Note for Customer contact Events.

Where to:

Maintenance menu > Brief Note Maintenance



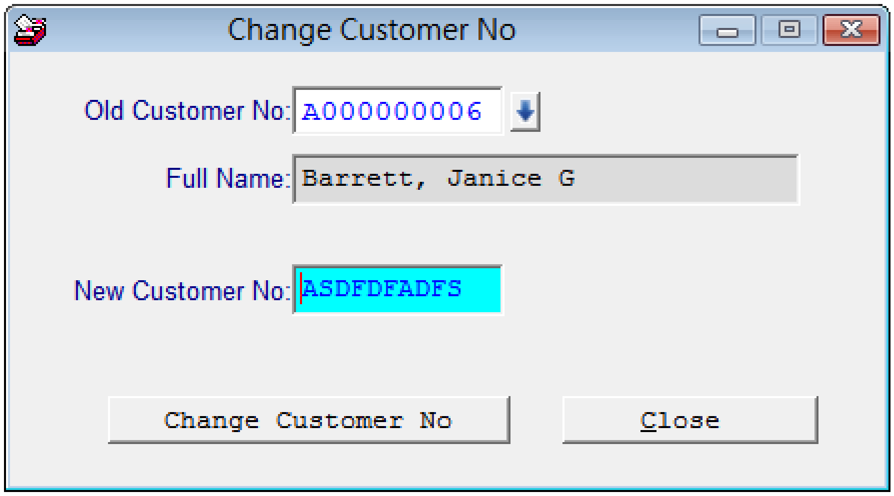
Change Customer No

You can change the existing Customer No.

Where to:

Tools menu > Change Customer No

Select the existing customer number, input the new customer no, and click Change Customer No button.

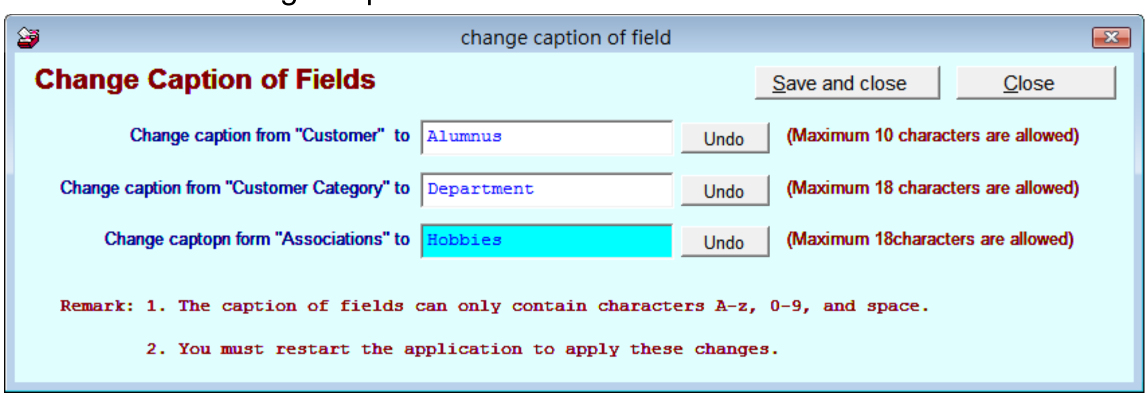


Change Caption of Field

You can define the captions of the system.

Where to:

Tools menu > Change Caption of Field



For example, you may change the "Customer" as "Alumnus"; the "Customer Category" as "Department", or "Associations" as "Hobbies".

Chapter

7

7. Reports

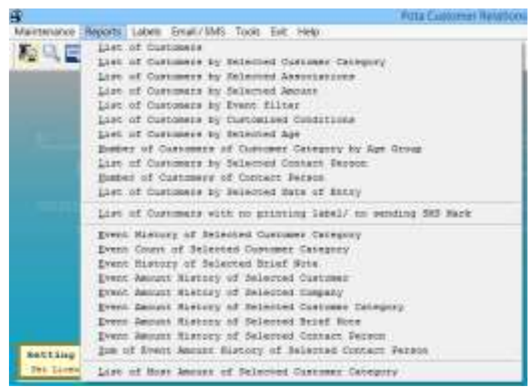
This Chapter will guide you how to view and print reports of the customers, contact events history, amount they paid, and other statistic data.

All the reports under the conditions that you selected can be exported into Excel file type.

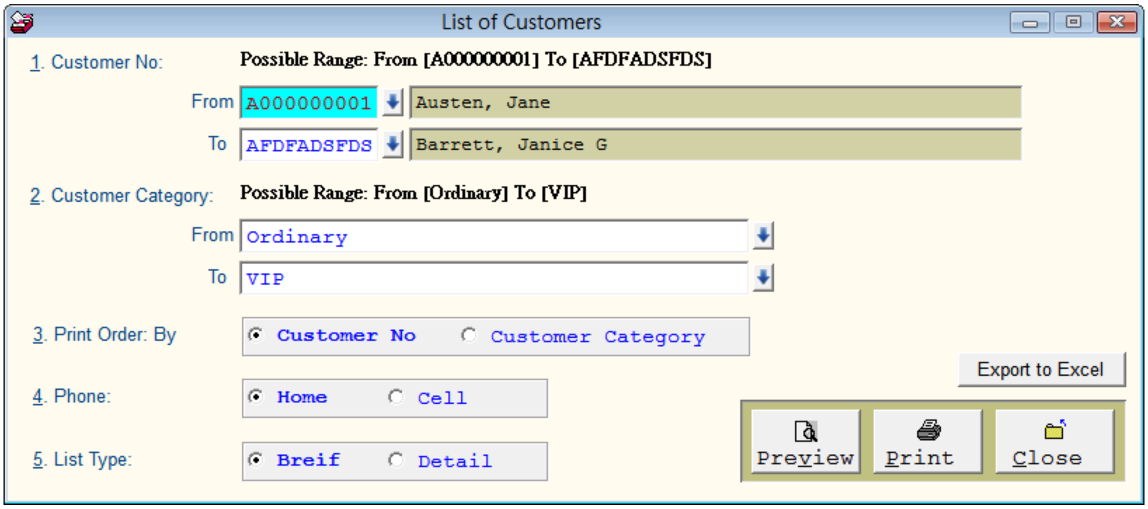
List of Customers

Where to:

Reports > List of Customers



This function allows you to view the report of customers in your system. In the “List of Customers” window, feel free to select data from Customer numbers, Customer Category. You may also have your report in either brief or detail mode. Brief mode will only include an Customer’s number, name, and phone number, and category, where you will see date of birth, company, email, …and more in the detail mode.



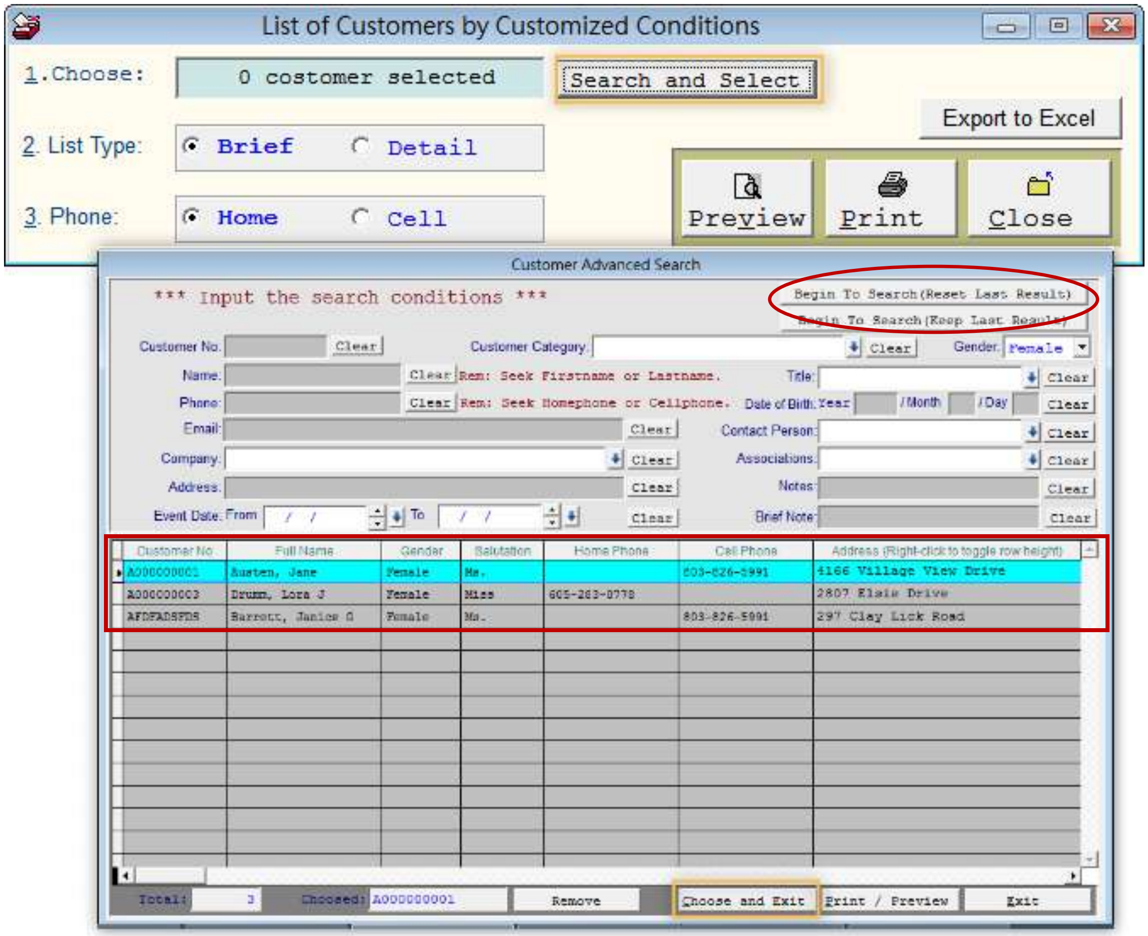
Click "preview", you are able to view the report (in PDF) which is based on your selection. Use "Print" button and print out your report.

List of Customers by Customized Conditions

Where to:

Reports > List of Customers by Customized Conditions

This report allows you to list your customers under your query. You may input your query in any field (Name, Phone, Category, Associations…) and then click "Begin to Search."

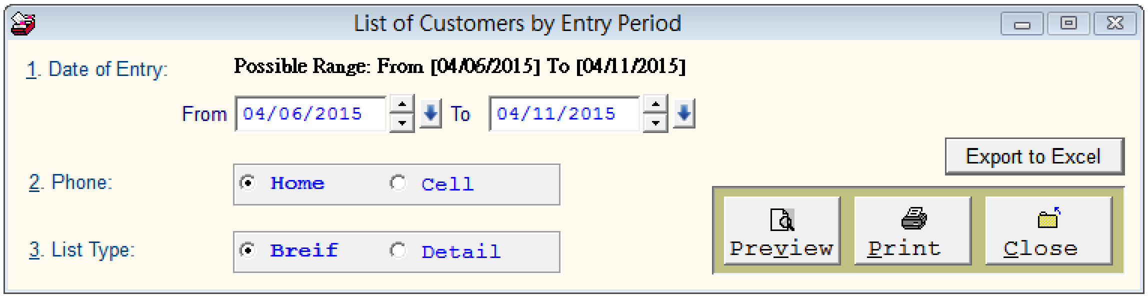


Click "Search and Select" to start your Advanced Search Windows, input your query and "Begin to Search", the result will be listed, and you can "Choose and Exit" and preview or print your report, or export to excel file.

List of Customers of Selected Day of Entry

Where to:

Reports > List of Customers of Selected Day of Entry



This function allows you to have the report of customer information sorted by entry date. You can set the date of entry, choosing either brief or detail mode can control what attributes you will have in your report.

List of Customers Marked No-Printing-Label or No-Sending-SMS

Where to:

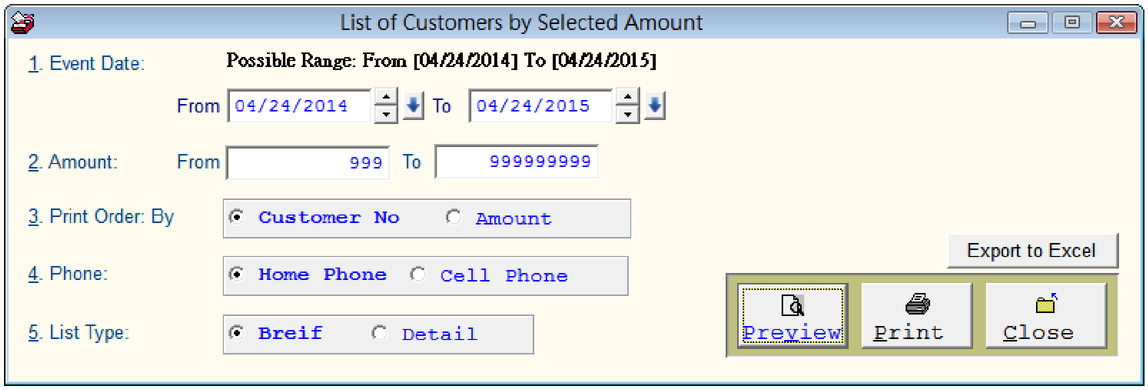
Reports > List of Customers Marked No-Printing-Label or No-Sending-SMS

You may mark your customer with no printing label, or no sending SMS (You may find this function in “Customer Maintenance” window). This report function allows you to view the marked customers. Simply select the condition from customer number and customer category and view the report which is based on your need.

List of Customers of Ranged Amount

Where to:

Reports> List of Customers of Ranged Amount



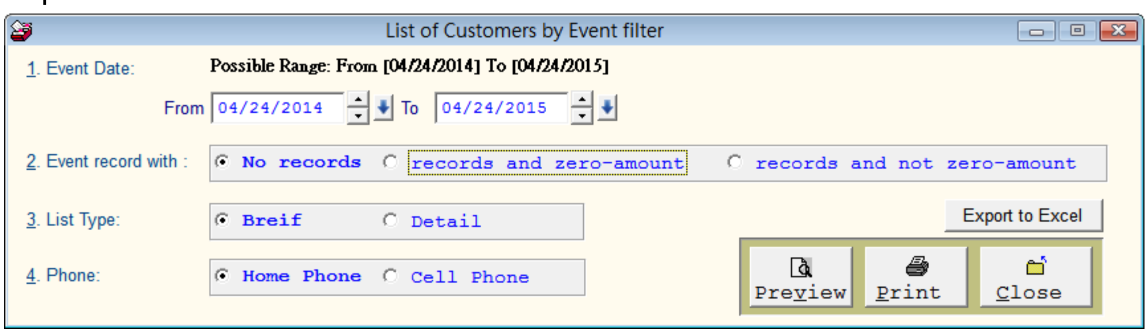
This function allows you to have the report of customer information sorted by specified amount. You can set the date of Event, choosing either brief or detail mode can control what attributes you will have in your report.

Customer No	*Full Name	*Gender (Age)	*Home Phone	*Customer Category	*	Amount
A000000001	Ms. Austen, Jane	Female (43)	803-826-5991	VIP		6,600
A000000003	Miss Drumm, Lora J	Female (47)	605-283-0778	VIP		2,200
A000000004	Mr. Stewart, Jade	Male (47)	720-449-5233	VIP		38,599

List of Customer of Event Records & Amount

Where to:

Reports> List of Customers of Event Records & Amount



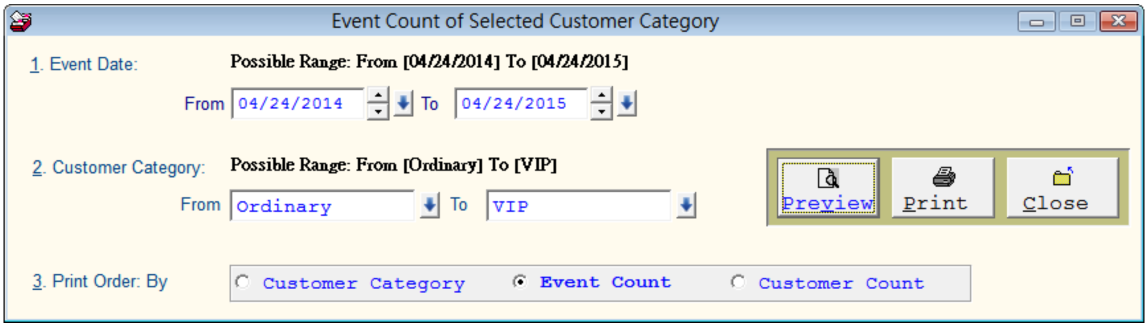
This report can help you to view the list of customer with no event records, or with event records but zero amount, or with event records and amount.

You may find this Event function in “Customer Maintenance” window.

Number of Event Records of Selected Customer Category

Where to:

Reports > Number of Event Records of Selected Customer Category



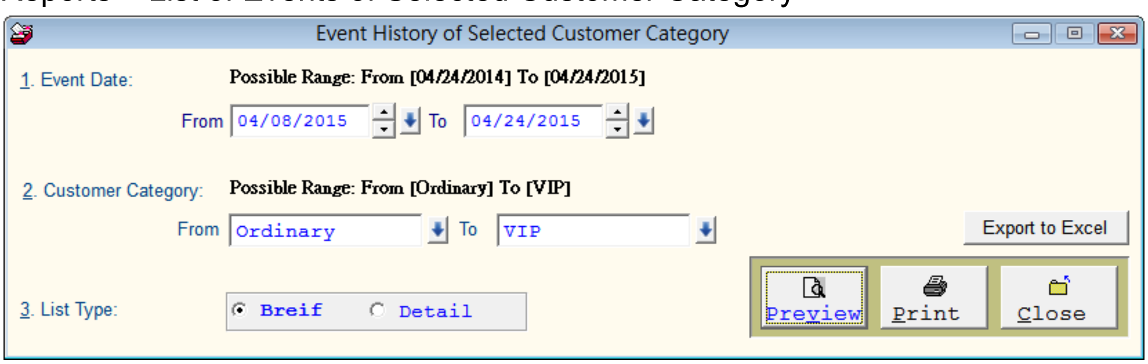
This function allows you to view the statistic data of your customers. This can simply help you with your customer and contact events evaluation. Be sure to click “preview” to view the report (in PDF) or use “Print” button to print out your report.

```
Event Date: From "04/24/2014" To "04/24/2015"
Customer Category: From "Ordinary" To "VIP"
Print Order: By "Event Count"
================== ================ =================== ========= ============= =============
Customer Category * Event Count(A) * Customer Count(B) * (A)/(B) * (A)/Sum (A) * (B)/Sum (B)
================== ================ =================== ========= ============= =============
VIP                              19                   4      4.75          90.4          80.0
Ordinary                          2                   1      2.00           9.5          20.0
---------------------------------------------------------------------------------------------
Total Count: 2                   21                   5
```

List of Events of Selected Customer Category

Where to:

Reports > List of Events of Selected Customer Category



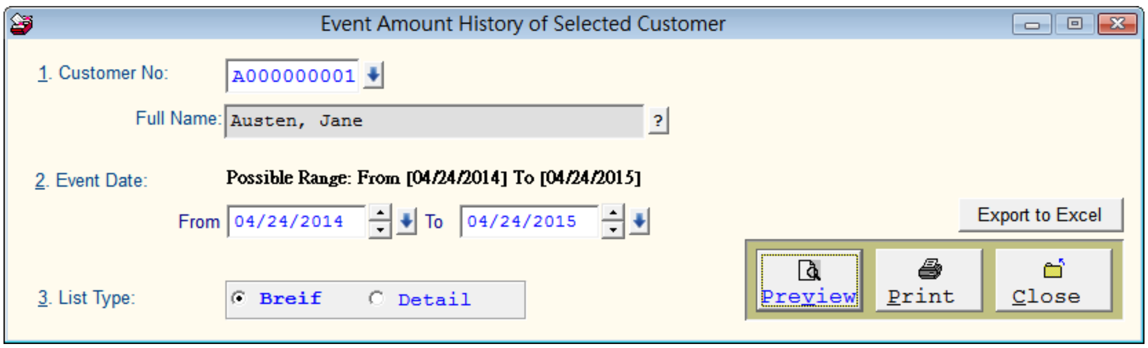
In this report, you can choose customer category and view the Event Records.

```
Event Date: From "04/08/2015" To "04/24/2015"
Customer Category: From "Ordinary" To "VIP"
========== ======================== ================== ============================================
Event Date*Full Name                *Status            *Brief Note
========== ======================== ================== ============================================
04/09/2015 Stewart, Jade             Completed          Ireland in Spring: Weeklong 3-City Trip
04/14/2015 Drumm, Lora J             Completed          membership
04/14/2015 Austen, Jane              Completed          membership
04/15/2015 Stewart, Jade             Processing         any products , service or support
04/24/2015 Barrett, Janice G         Completed          membership-2015
```

List of Event/Amount of Selected Customer

Where to:

Reports > List of Event/Amount of Selected Customer



In this report, you can choose a customer and view the Event Records.

```
Customer No:"A000000001"  [Austen, Jane]  Cell Phone: 803-826-5991
Event Date: From "04/24/2014" To "04/24/2015"
========== ======================== ==================== ==================================== ==========
Event Date*Full Name                *Status              *Brief Note                          *    Amount
========== ======================== ==================== ==================================== ==========
12/18/2014 Austen, Jane              Completed            sending Christmas cards                       0
03/05/2015 Austen, Jane              Completed            living room chair                         5,600
04/14/2015 Austen, Jane              Completed            membership                                1,000
-----------------------------------------------------------------------------------------------------------
Total Count: 3                                                                                      6,600
```

You may also customize several conditions (dates, Customer Category, Company, Brief Note, and Contact Person) and view the Event/Amount records.

(1) List of Event/Amount of Selected Company

You may choose a Company and view it's event records.

(2) List of Event/Amount of Selected Customer Category

You may choose a Customer Category and view it's event records.

(3) List of Event/Amount of Selected Brief Note

You may choose a Brief Note in your Event records, and view the list of Event records.

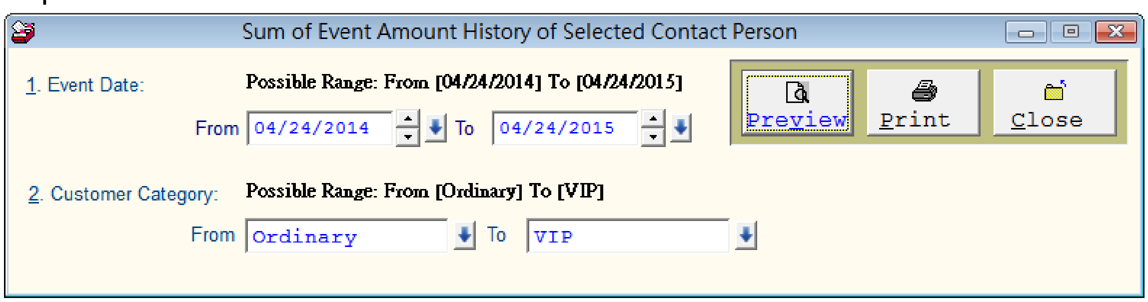
(4) List of Event/Amount of Selected Contact Person

You may choose a Contact Person in your Event records, and view the list of Event records.

Total Amount of Selected Contact Person

Where to:

Reports > Total Amount of Selected Contact Person



This function allows you to view the total amount from each contact person, you can set the time range and select your customer category from your customer records.

Event Date: From "04/24/2014" To "04/24/2015"
Customer Category: From "Ordinary" To "VIP"

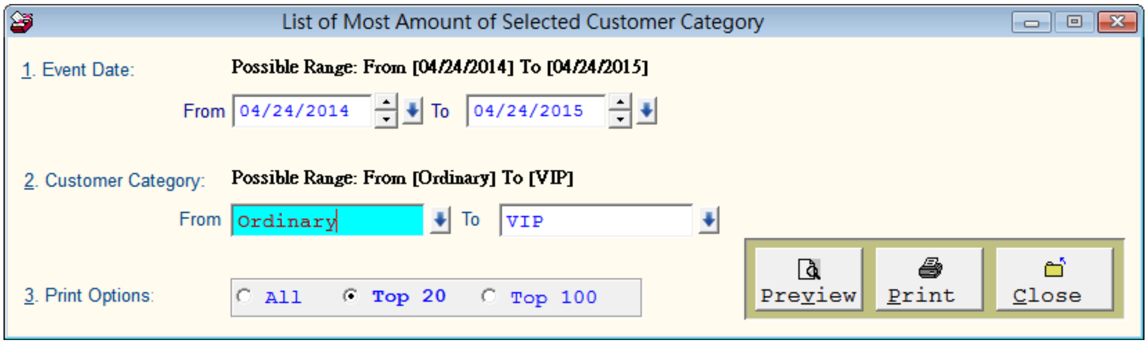
Rank	Contact Person	Contacter Phone	Count	Average Amount	Total Amount
1	Felicity Young	425-606-1234	16	4,512	72,199
2	Catherine Cookson		3	733	2,200
3	Alicia Keys	917 934 3319	2	0	0

The amount comes from Customer's Event records.

List of Amount Ranking by Selected Customer Category

Where to:

Reports > List of Amount Ranking by Selected Customer Category



This function allows you to view the amount ranking of your customers. The result can help you with your customer and contact events evaluation. Be sure to click "preview" to view the report (in PDF) or use "Print" button to print out your report.

```
Event Date: From "04/24/2014" To "04/24/2015"
Customer Category: From "Ordinary" To "VIP"
======== =========== ============================== ======================== ======= ==========
 Rank   *Customer No*Full Name                     *Customer Category       *  Count*    Amount
======== =========== ============================== ======================== ======= ==========
       1 A000000004  Stewart, Jade                  VIP                            9     38,599
       2 A000000001  Austen, Jane                   VIP                            5     33,400
       3 A000000003  Drumm, Lora J                  VIP                            3      2,200
```

The amount comes from Customer's Event records.

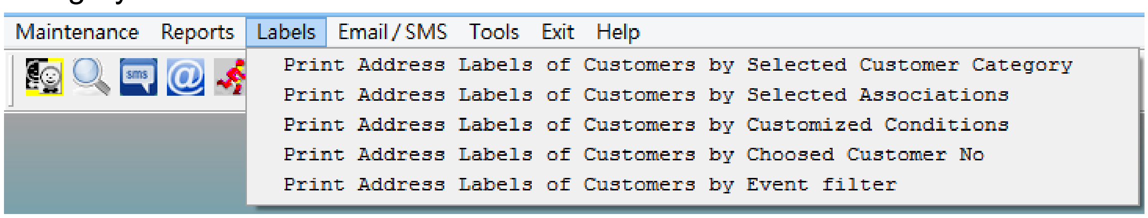
Chapter 8

8. Printing Address Labels

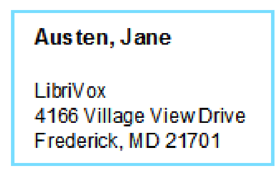
Print the Selected Customer Category

Where to:

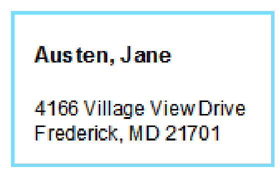
Menu >Labels> Print Address Labels of Customers by Selected Customer Category



If you want to quickly generate a set of Customer labels, select the first option "by Selected Customer Category" After setting your conditions, click "preview" to view the labels; click print to print out labels.



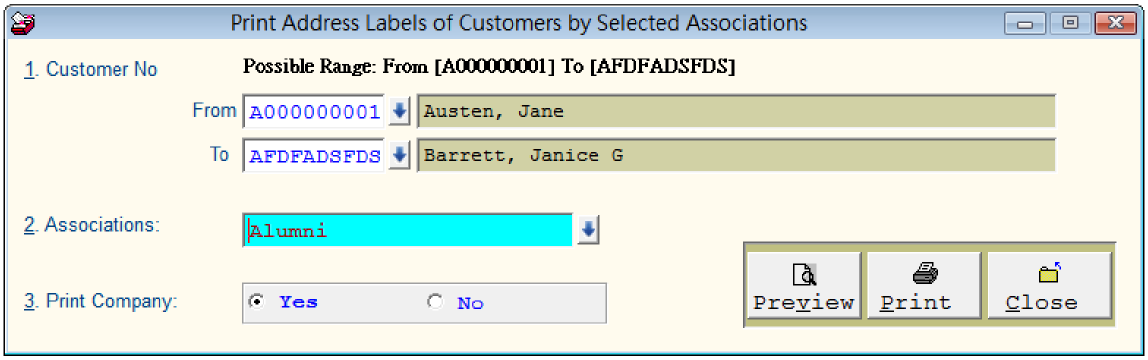
↑ With Compnay Name



Print the Selected Associations

Where to:

Menu >Labels> Print Address Labels of Customers by Selected Associations



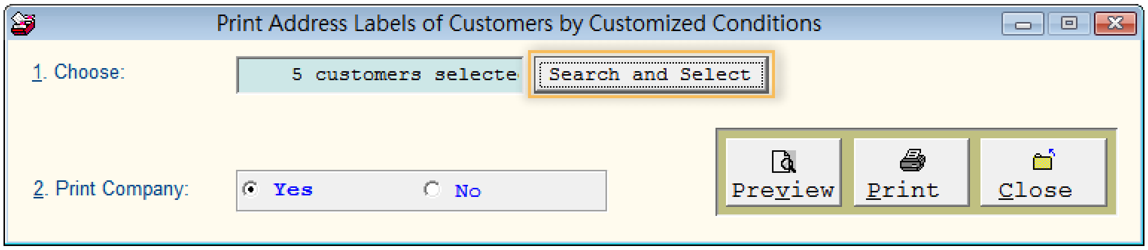
Please feel free to select/ unselect the checkboxes (see the figure below). After setting your conditions, click “preview” to view how the spine labels will be like. Click print to print out those labels.

Print Address Labels by Customized Conditions

Where to:

Menu >Labels> Print Address Labels of Customers by Customized Conditions

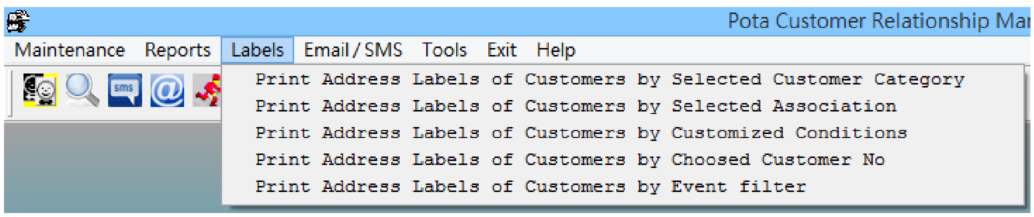
If your mother institution has already had its own ID/ member card, you simply need to print out the member’s barcode labels. If you want to quickly generate a set of member labels, select the first option “Printing-WL-1000 (5*10 Laser).” After setting your conditions, click “preview” to view how the member barcode labels will be like. Click print to print out those labels.

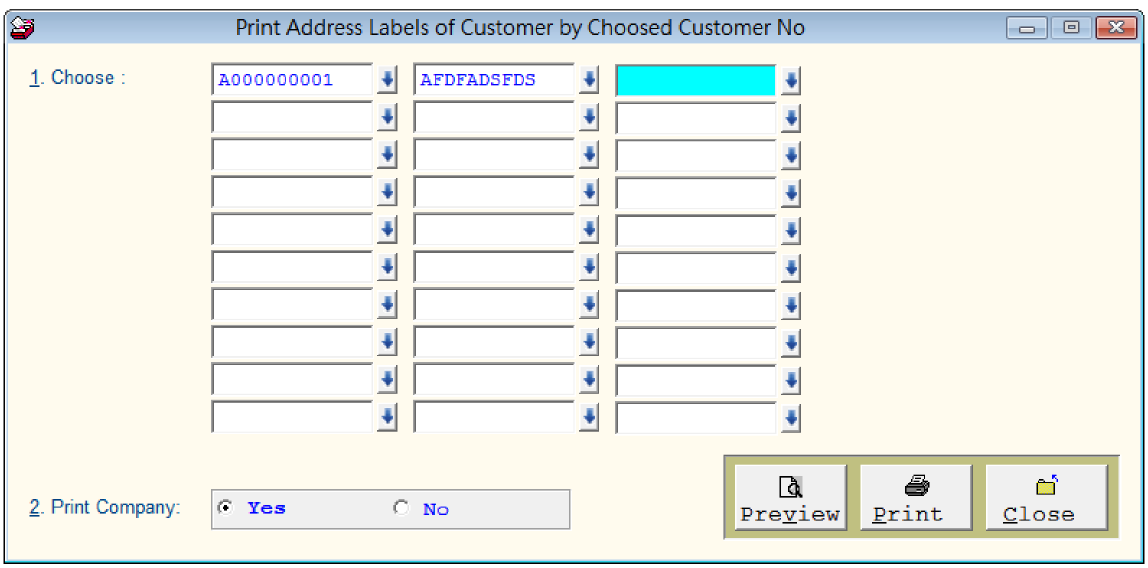


Print by Chosen Customer No

Where to:

Menu >Labels> Print Address Labels of Customers by Chosen Customer No





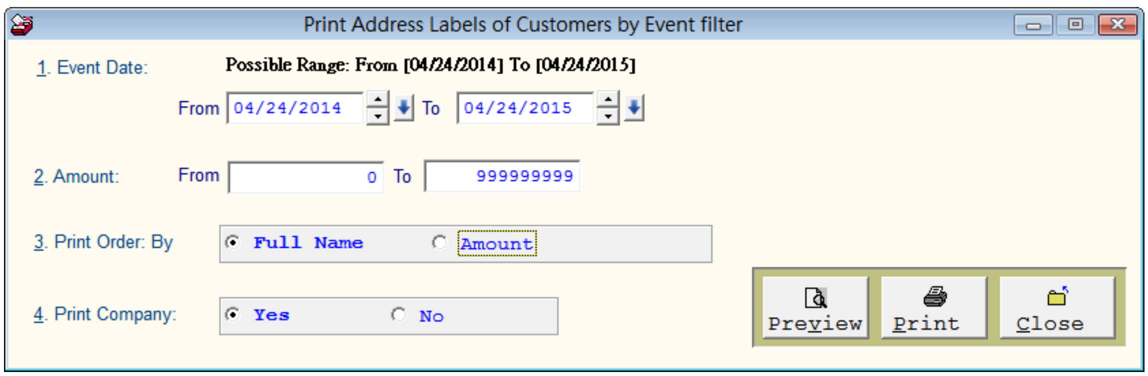
Note: If you want to select several Customer at once, please use chosen Customer number." The window allows you to input the Customers which are not necessary to be continuous.

If you want to quickly generate a set of library cards, select the first option "Printing-WL-OL244 (2*5 Laser)." After setting your conditions, click "preview" to view how the library cards will be like. Click print to print out those cards.

Print by Ranged Amount

Where to:

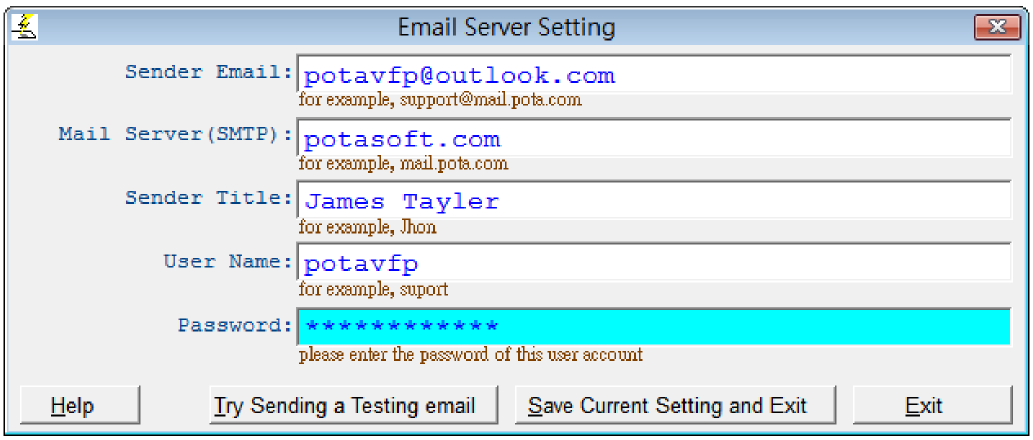
Menu >Labels> Print Address Labels of Customers by Chosen Customer No



Chapter 9

9. Mass Email

Email Server Setting



Where to:

Menu > **Email/SMS** > Email Server Setting

Set up the Email Server to send out “group emails”. Gmail, Yahoo, Hotmail, Outlook are supported.

Send Email to Customers

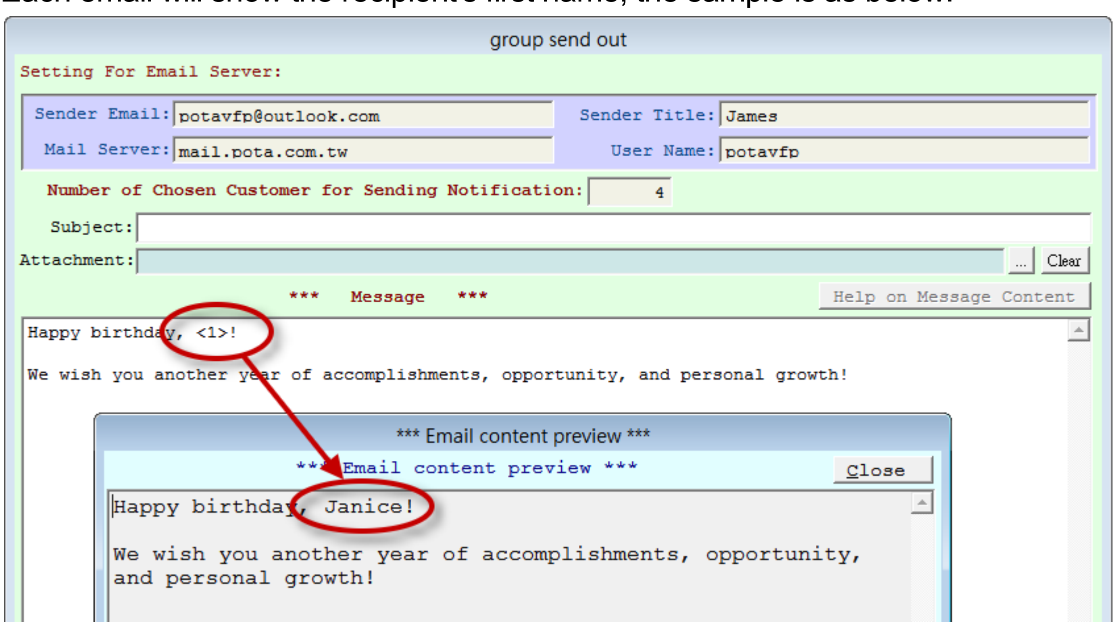
Where to:

Menu > **Email/SMS** >Send Email Customer

E-mail Content setting

```
use <1> to replace recipient's First Name
use <2> to replace recipient's Last Name
use <3> to replace recipient's Full Name
use <4> to replace recipient's Customer Category
use <5> to replace recipient's Salutation
```

Each email will show the recipient's first name, the sample is as below.



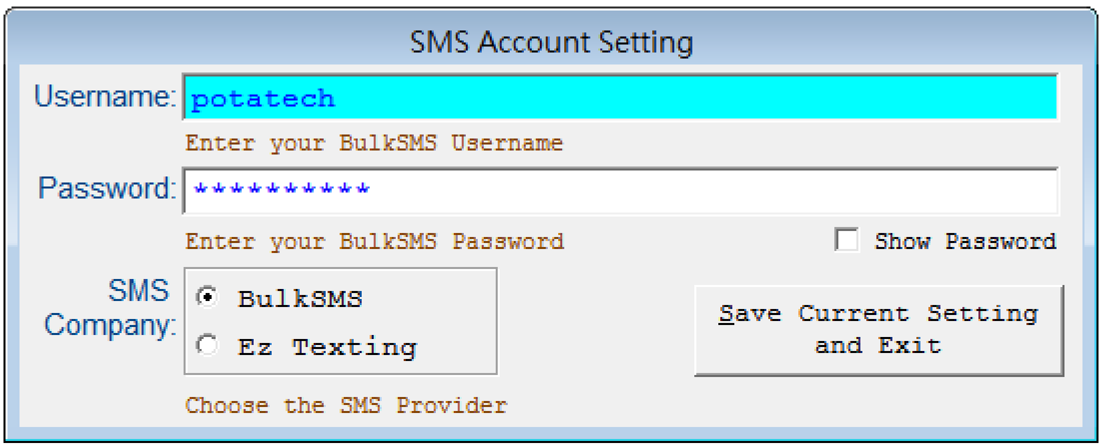
Chapter
10

10. Bulk SMS

SMS Account Setting

Where to:

Menu > **Email/SMS** > SMS Account Setting

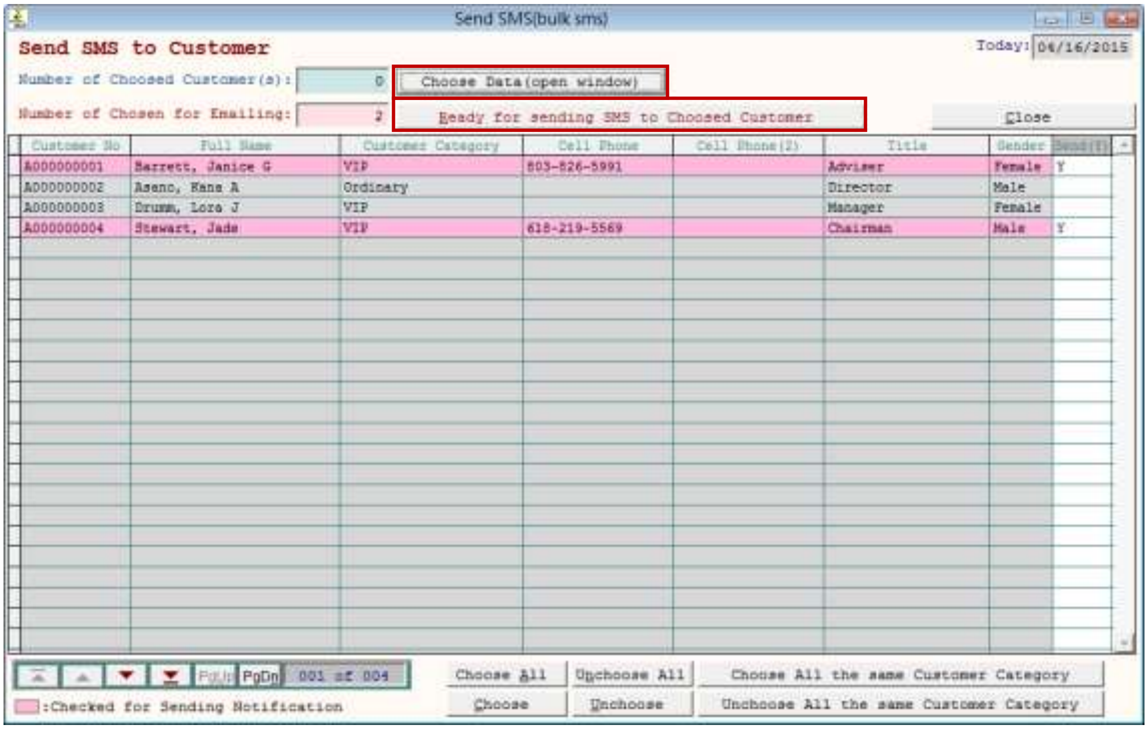


Set up the SMS Username and Password to send out Text message to selected customers. You may choose SMS provider from BulkSMS or Ez Texting. http://www.bulksms.com/ https://www.eztexting.com/

Send Bulk SMS

Where to:

Menu > **Email/SMS** > Send SMS to Customer



Chapter

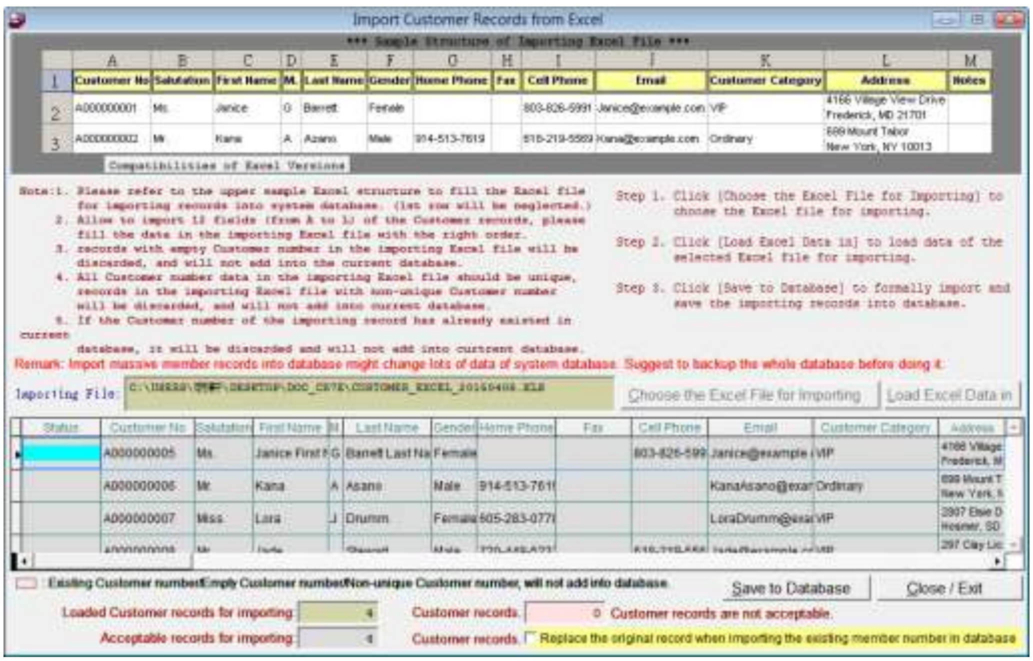
11

11. Mass Import/Export

Import Customer Records from Excel

Where to:

Menu >Tools > Import Customer Records from Excel



Please refer to the sample Excel structure to fill the Excel file for importing Member records into system database. (1st row will be neglected)

Download the sample Excel
http://download.potasoft.com/manual/Customer_Excel.xls

> Note: Import massive Customer records into database might change lots of data of system database. Suggest to back up the whole database for doing it.

To replace the original data, by click on “Replace the original record when importing the existing Customer number in database”.

Export All Customer Records to Excel

Where to:

Menu >Tools > Export All Customer Records to Excel

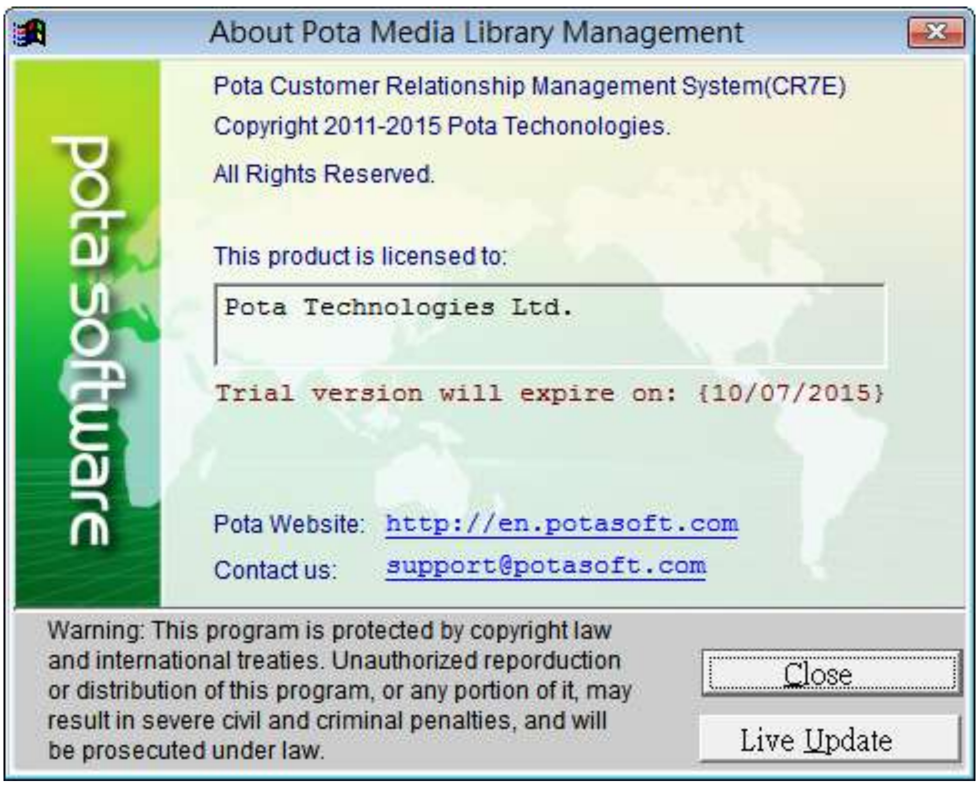
Chapter 12

12. Live Update

Live Update

Where to:

Menu > Help >About the POTA Customer Relationship Management and Live Update(CR7E).



Click on the “Live Update” button to get the updated executive file. We update the program to get compatible with the latest windows and office versions. And also add some small functions to make friendlier user interface. "Live Update" will not change the content of any existing data.

Chapter 13

13. How to Buy

We offer up to 90 day & 990 record limitation free trial version, you can try all of the features in the program to get a feel for it. And will remind you when your trial is coming to an end. If you want to convert to the full version, please visit our website (http://en.potasoft.com/) to see the instruction. We take PayPal and other forms of payment upon request. If you have any questions, please visit our website or contact us via email support@potasoft.com or Skype ID: pota.soft