



POTA SOFTWARE | PACKAGES & CUSTOMER DESIGN

# **System Manual for CR7E**

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POTA Customer Relationship Management System(CR7E)

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## **1. Introduction**

**P**OTA 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.

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## 2. Data administration

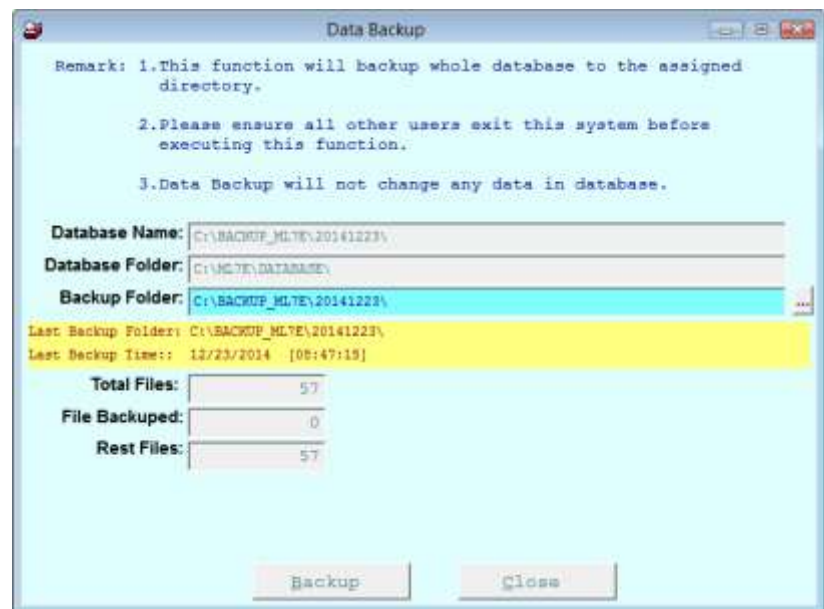
This chapter will demonstrate how to backup, restore, and re-index your database in the POTA Customer Relationship Management System.

### 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



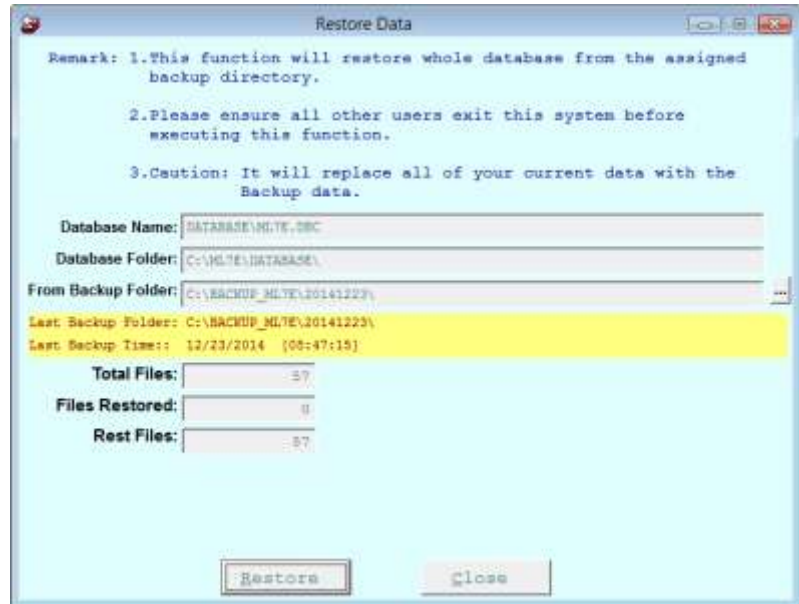
(C:\BACKUP\_CR7E\20150428) in the Data Backup window. Click on the “Backup” button and start to back up your database.

## 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.

### 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

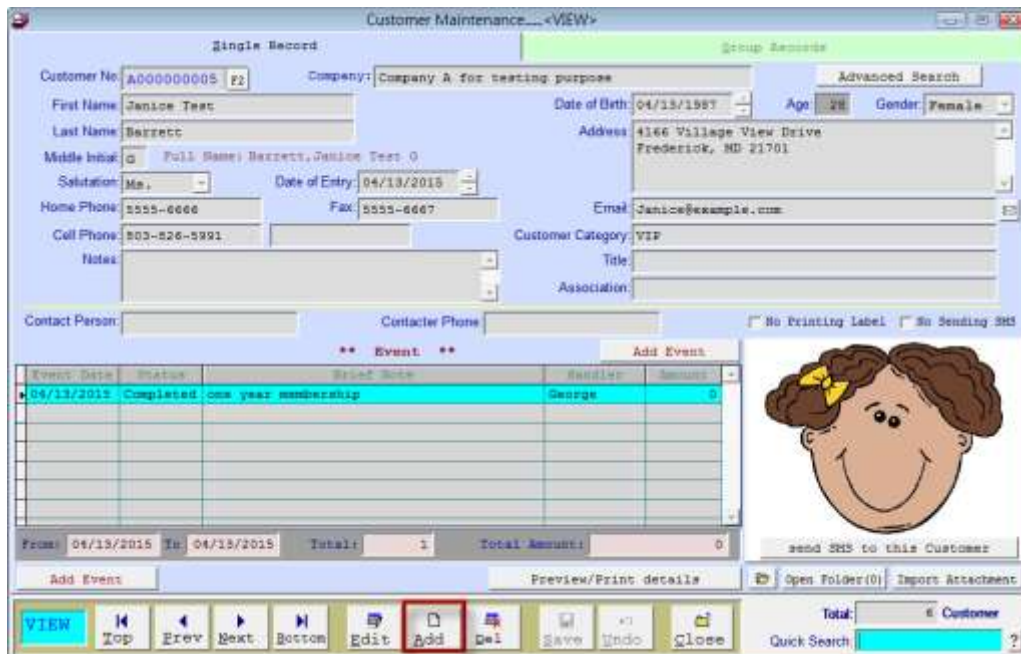
Where to:

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

Add

or,

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



Customer Maintenance... <VIEW>

Single Record      Group Records

Customer No: A000000005      Company: Company A for testing purpose      Advanced Search

First Name: Janice Test      Date of Birth: 04/13/1987      Age: 28      Gender: Female

Last Name: Berrett      Address: 4166 Village View Drive  
Frederick, MD 21701

Middle Initial:      Full Name: Berrett, Janice Test O

Solution: Ma.      Date of Entry: 04/13/2015

Home Phone: 5555-6666      Fax: 5555-6667      Email: Janice@example.com

Cell Phone: 803-826-3391      Customer Category: VIP

Notes:      Title:      Association:

Contact Person:      Contacter Phone:      ☐ No Printing Label      ☐ No Sending SMS

Event:      Add Event

Event Date	Status	Event Date	Sender	Amount
04/13/2015	Completed	one year membership	George	0

From: 04/13/2015      To: 04/13/2015      Total: 1      Total Amount: 0

Add Event      Preview/Print details                 

VIEW      Top      Prev      Next      Bottom      Edit      Add      Del      Save      Undo      Close

Total: 6 Customer      Quick Search:



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

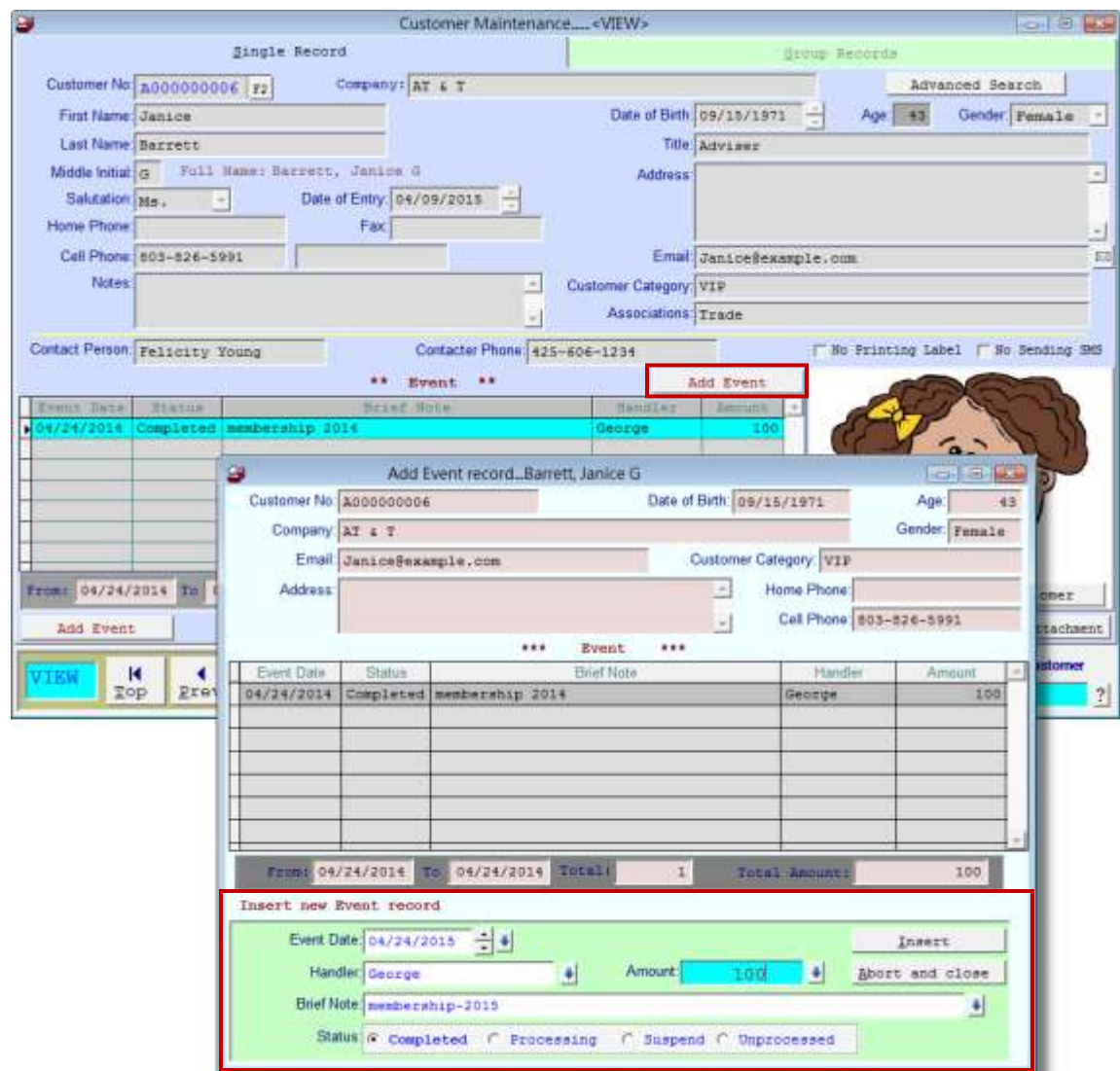
View your group records and find the record(s) you want to remove. Click on the record you want to delete and click “Del” (down the group record window)

## 4. Contact Event

### Add a new Event

Where to:

Maintenance menu > Customer maintenance > Add Event



Customer Maintenance...<VIEW>

Single Record      Group Records

Customer No: A000000006      Company: AT & T      Advanced Search

First Name: Janice      Date of Birth: 09/15/1971      Age: 43      Gender: Female

Last Name: Barrett      Title: Adviser

Middle Initial: G      Full Name: Barrett, Janice G      Address:

Salutation: Ms.      Date of Entry: 04/09/2015

Home Phone:      Fax:

Cell Phone: 803-826-5991      Email: Janice@example.com

Notes:      Customer Category: VIP

Associations: Trade

Contact Person: Felicity Young      Contacter Phone: 425-606-1234      No Printing Label      No Sending SMS

\*\*\* Event \*\*\*      Add Event

Event Date	Status	Brief Note	Handler	Amount
04/24/2014	Completed	membership 2014	George	100

From: 04/24/2014 To: 04/24/2014      Add Event      VIEW      Top      Prev

Add Event record...Barrett, Janice G

Customer No: A000000006      Date of Birth: 09/15/1971      Age: 43      Gender: Female

Company: AT & T      Customer Category: VIP

Email: Janice@example.com      Address:      Home Phone:      Cell Phone: 803-826-5991

\*\*\* Event \*\*\*

Event Date	Status	Brief Note	Handler	Amount
04/24/2014	Completed	membership 2014	George	100

From: 04/24/2014 To: 04/24/2014      Total: 1      Total Amount: 100

Insert new Event record:

Event Date: 04/24/2015      Insert

Handler: George      Amount: 100      Abort and close

Brief Note: membership-2015

Status: ☒ Completed    ☐ Processing    ☐ Suspend    ☐ Unprocessed

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

Where to:

The screenshot displays the 'Customer Maintenance' software interface. At the top, there's a title bar 'Customer Maintenance...<EDIT>' and a menu bar with 'Single Record' and 'Group Records'. Below the menu bar, there are input fields for 'Customer No.' (A0000000006 F2) and 'Company' (AT & T). A red box highlights the 'Edit / delete Event record...(Barrett, Janice G)' dialog box. This dialog box contains fields for 'Event Date' (04/24/2015), 'Handler' (George), 'Amount' (100), and 'Brief Note' (membership-2015). It also has radio buttons for 'Status' (Completed, Processing, Suspend, Unprocessed) and buttons for 'Save', 'Abort and close', and 'Delete and close'. Below the dialog box, there's a section for 'Contact Person' (Felicity Young) and 'Contacter Phone' (425-606-1234). A table titled '\*\* Event: \*\*' is shown, with columns for 'Event Date', 'Status', 'Brief Note', 'Handler', and 'Amount'. The table contains two rows: one for '04/24/2015 Completed membership-2015 George 100' and another for '04/24/2014 Completed membership 2014 George 100'. A red box highlights the first row. To the right of the table is a cartoon drawing of a woman's face. At the bottom, there's a status bar with 'From: 04/24/2014 To: 04/24/2015 Total: 2 Total Amount: 200' and a row of buttons: EDIT, Top, Prev, Next, Bottom, Edit, Add, Del, Save, Undo, Close. A text box with the instruction 'Click the event that you want to edit>>Edit Event' is overlaid on the table.

Customer Maintenance...<EDIT>

Single Record Group Records

Customer No. A0000000006 F2 Company: AT & T

First Name Last Name Middle Name Surname Home Phone Cell Phone

Edit / delete Event record...(Barrett, Janice G)

Edit Event record

Event Date: 04/24/2015 Handler: George Amount: 100 Brief Note: membership-2015 Status: ☒ Completed ☐ Processing ☐ Suspend ☐ Unprocessed

Save Abort and close Delete and close

Contact Person: Felicity Young Contacter Phone: 425-606-1234 No Printing Label No Sending SMS

\*\* Event: \*\* Edit Event

Event Date	Status	Brief Note	Handler	Amount
04/24/2015	Completed	membership-2015	George	100
04/24/2014	Completed	membership 2014	George	100

Click the event that you want to edit>>Edit Event

From: 04/24/2014 To: 04/24/2015 Total: 2 Total Amount: 200

add / change photo

EDIT Top Prev Next Bottom Edit Add Del Save Undo Close

Total: 5 Customer

9

## 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.

The screenshot shows the 'Edit Event record' window. At the top, it displays the 'Event record' with a 'Possible Range: From [04/24/2014] To [04/24/2015]'. Below this, there are date pickers for 'From' (04/24/2014) and 'To' (04/24/2015). A red box highlights the 'Select starting date of editing' section, which includes a date picker for 'From' (04/09/2015) and a 'Search Event record' button. The main table lists events with columns: Event Date, Customer No, Full Name, Status, Brief Note, Handler, and Amount. The first row is selected, showing an event on 04/24/2015 for customer A000000006, handled by George, with a brief note of 'membership-2015' and an amount of 100. Below the table, there is a 'Customer detail' section with fields for Full Name, Title, Customer Category, Customer No, Home Phone, Cell Phone, Date of Birth, Age, Gender, and Contact Person. At the bottom, a red box highlights the 'Selected Event record' section, which includes fields for Event Date, Handler, Brief Note, Amount, and Status, along with buttons for 'Save the changes', 'Delete the record', and 'Close'.

Event Date	Customer No	Full Name	Status	Brief Note	Handler	Amount
04/24/2015	A000000006	Barrett, Janice	Completed	membership-2015	George	100
04/15/2015	A000000004	Stewart, Jade	Processing	any products , service or support	George	0
04/14/2015	A000000001	Barrett, Janice	Completed	membership	Katharine	1,000
04/14/2015	A000000003	Drum, Lora J	Completed	membership	Harvy	1,000
04/09/2015	A000000004	Stewart, Jade	Completed	Ireland in Spring: Weeklong 3-City Trip	George	8,000

Customer detail:

Full Name: Barrett, Janice G  
Title: Adviser  
Customer Category: VIP  
Customer No: A000000006  
Home Phone:   
Cell Phone: 803-826-5991  
Date of Birth: 09/15/1971  
Age: 43  
Gender: Female  
Address:   
Contact Person: Felicity Young

Selected Event record

Event Date: 04/24/2015  
Handler: George  
Brief Note: membership-2015  
Amount: 100  
Status: ☒ Completed ☐ Processing ☐ Suspend ☐ Unprocessed

Buttons: Save the changes, Delete the record, Close

## 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.

The screenshot shows the 'Add Event record to Customers' window. At the top, it displays 'Today: 04/16/2015' and 'Choose: 4 customers selected'. A 'Search and Select' button is highlighted with a red box. Below this, a 'Number of Chosen for Enabling:' field shows '4'. A table lists four customers with columns for Customer No, Full Name, Customer Category, Address, Gender, and Y/N. The Y/N column is highlighted with a red box. An 'Add Event record to Customer' button is also highlighted with a red box. An 'Insert new Event record (Total 4)' dialog box is open in the foreground, showing fields for Event Date (12/18/2014), Handler (Judi), Amount (0), Brief Note (sending Christmas cards), and Status (Completed). The dialog box has 'Insert' and 'Abort and close' buttons. At the bottom of the main window, there are buttons for 'Choose All', 'Unchoose All', 'Choose All the same Customer Category', and 'Unchoose All the same Customer Category'.

Customer No	Full Name	Customer Category	Address (Right-click to toggle row height)	Gender	Y/N
A000000001	Barrett, Janice G	VIP	4166 Village View Drive	Female	Y
A000000002	Asano, Kana A	Ordinary	699 Mount Tabor	Male	Y
A000000003	Drum, Lora J	VIP	2807 Elsie Drive	Female	Y
A000000004	Stewart, Jade	VIP	297 Clay Link Road	Male	Y

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.


## 5. Advanced Search

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

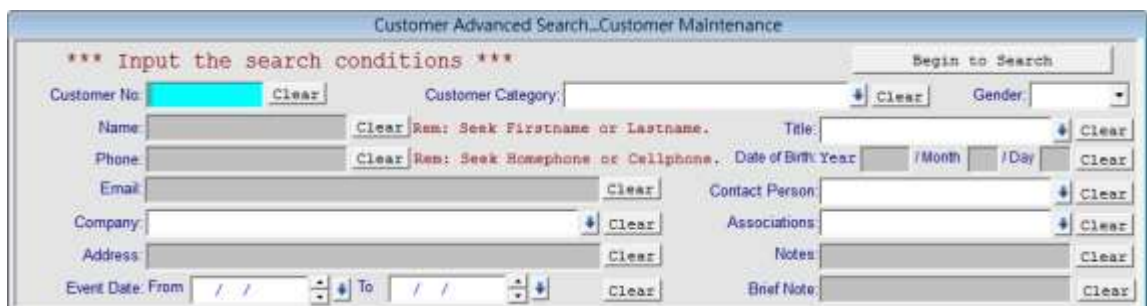
### Customer Advanced Search

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 screenshot shows a web application window titled "Customer Advanced Search...Customer Maintenance". Inside the window, there is a section titled "\*\*\* Input the search conditions \*\*\*". Below this title, there are several search criteria fields, each with a "Clear" button next to it. The fields are: Customer No. (highlighted in blue), Customer Category, Gender (a dropdown menu), Name, Title, Phone, Date of Birth (Year, Month, Day), Email, Contact Person, Company, Associations, Address, Notes, Event Date (From and To), and Brief Note. Each field has a "Clear" button. At the top right of the search section, there is a "Begin to Search" button. The form is designed for searching customers based on various attributes.

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







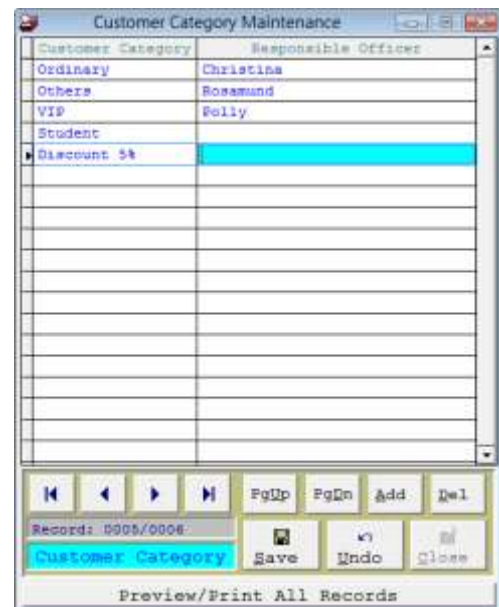
## 6. Other Settings

### 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



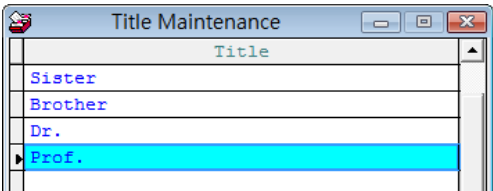
In the Customer Category Maintenance window, you are able to add, delete, and edit the customer category by clicking corresponding buttons. Be sure to click “Save” button to save your setting, or the setting will not be applied.

**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

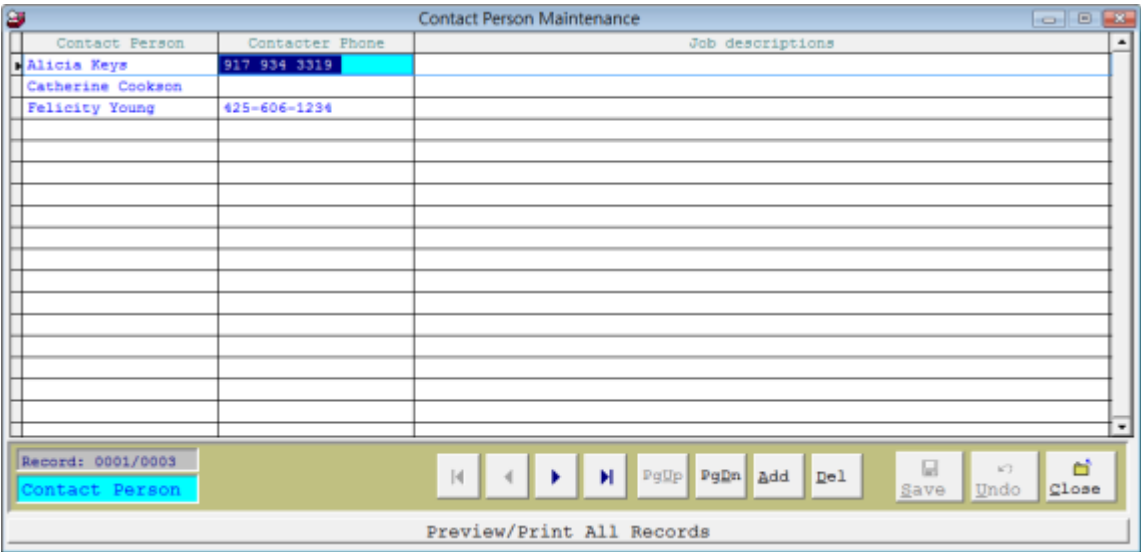


In the Title Maintenance window, you are able to add, delete, and edit the Title by clicking corresponding buttons. Be sure to click “Save” button to save your setting, or the setting will not be applied.

**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

Association Maintenance

Association

- 501(c)
- Alumni
- Professional
- Sports
- Trade

Record: 0005/0005

Association

Save Undo Close

Preview/Print All Records

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.

Handler Maintenance

Handler

- George
- Harvy
- Judi
- Katharine
- Luke

Record: 0005/0005

Handler

Save Undo Close

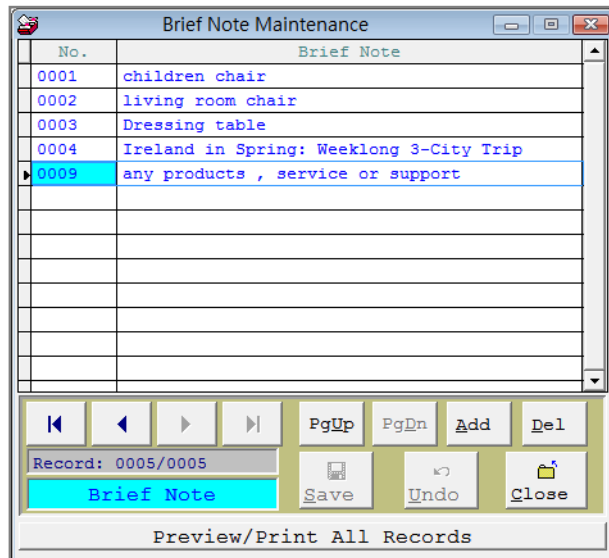
Preview/Print All Records

## 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



The screenshot shows a window titled "Brief Note Maintenance". It contains a table with two columns: "No." and "Brief Note". The table has five rows of data, with the fifth row (0009) highlighted in blue. Below the table is a control panel with buttons for navigation (left, right, first, last), "PgUp", "PgDn", "Add", and "Del". There is also a "Record: 0005/0005" label, a "Brief Note" button, and "Save", "Undo", and "Close" buttons. At the bottom, there is a "Preview/Print All Records" button.

No.	Brief Note
0001	children chair
0002	living room chair
0003	Dressing table
0004	Ireland in Spring: Weeklong 3-City Trip
0009	any products , service or support

Record: 0005/0005

Brief Note

Save Undo Close

Preview/Print All Records

## 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 Customer No

Old Customer No: A000000006

Full Name: Barrett, Janice G

New Customer No: ASDFDFADFS

Change Customer No Close

## Change Caption of Field

You can define the captions of the system.

Where to:

Tools menu > Change Caption of Field

change caption of field

**Change Caption of Fields** Save and close Close

Change caption from "Customer" to Alumnus Undo (Maximum 10 characters are allowed)

Change caption from "Customer Category" to Department Undo (Maximum 18 characters are allowed)

Change caption from "Associations" to Hobbies Undo (Maximum 18 characters are allowed)

Remark: 1. The caption of fields can only contain characters A-z, 0-9, and space.  
2. You must restart the application to apply these changes.

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

## 7. Reports

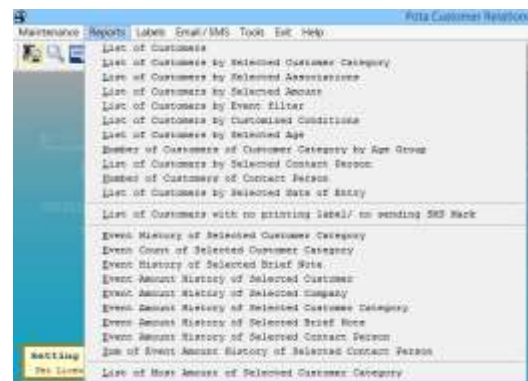
This Chapter will guide you how to view and print reports of the customers, contact events history, amount they paid, and other statistic data.

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.

**List of Customers**

1. Customer No: Possible Range: From [A000000001] To [AFDFADSFDS]  
 From: A000000001 ↓ Austen, Jane  
 To: AFDFADSFDS ↓ Barrett, Janice G

2. Customer Category: Possible Range: From [Ordinary] To [VIP]  
 From: Ordinary ↓  
 To: VIP ↓

3. Print Order: By ☒ Customer No ☐ Customer Category

4. Phone: ☒ Home ☐ Cell

5. List Type: ☒ Breif ☐ Detail

Export to Excel

Preview Print Close

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.”





**List of Customers by Entry Period**

1. Date of Entry: Possible Range: From [04/06/2015] To [04/11/2015]  
 From 04/06/2015 To 04/11/2015

2. Phone: ☒ Home ☐ Cell

3. List Type: ☒ Brief ☐ Detail

Export to Excel

Preview Print Close

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

**List of Customers with no printing label/ no sending SMS Mark**

1. Customer No: Possible Range: From [A000000001] To [AFDFAD8FDS]  
 From A000000001 To AFDFAD8FDS  
 Austen, Jane  
 Barrett, Janice G

2. Customer Category: Possible Range: From [Ordinary] To [VIP]  
 From Ordinary To VIP

3. Print Order By: ☒ Customer No ☐ Customer Category

4. Label/SMS Setting: ☒ No Printing Label ☐ No Sending SMS ☐ Neither

Export to Excel

Preview Print Close

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

**List of Customers by Selected Amount**

1. Event Date: Possible Range: From [04/24/2014] To [04/24/2015]  
 From 04/24/2014 To 04/24/2015

2. Amount: From 999 To 999999999

3. Print Order: By ☒ Customer No ☐ Amount

4. Phone: ☒ Home Phone ☐ Cell Phone

5. List Type: ☒ Breif ☐ Detail

Buttons: Preview, Print, Close, Export to Excel

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

**List of Customers by Event filter**

1. Event Date: Possible Range: From [04/24/2014] To [04/24/2015]  
 From 04/24/2014 To 04/24/2015

2. Event record with : ☒ No records ☒ records and zero-amount ☐ records and not zero-amount

3. List Type: ☒ Breif ☐ Detail

4. Phone: ☒ Home Phone ☐ Cell Phone

Buttons: Preview, Print, Close, Export to Excel

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

Event Count of Selected Customer Category

1. Event Date: Possible Range: From [04/24/2014] To [04/24/2015]  
From 04/24/2014 To 04/24/2015

2. Customer Category: Possible Range: From [Ordinary] To [VIP]  
From Ordinary To VIP

3. Print Order: By ☐ Customer Category ☒ Event Count ☐ Customer Count

Preview Print Close

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

Event History of Selected Customer Category

1. Event Date: Possible Range: From [04/24/2014] To [04/24/2015]  
From 04/08/2015 To 04/24/2015

2. Customer Category: Possible Range: From [Ordinary] To [VIP]  
From Ordinary To VIP

3. List Type: ☒ Breif ☐ Detail

Export to Excel

Preview Print Close

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

Event Amount History of Selected Customer

1. Customer No:  Full Name:

2. Event Date: Possible Range: From [04/24/2014] To [04/24/2015]  
 From  To

3. List Type: ☒ Breif ☐ Detail

Buttons: Preview, Print, Close, Export to Excel

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

Sum of Event Amount History of Selected Contact Person

1. Event Date: Possible Range: From [04/24/2014] To [04/24/2015]  
From 04/24/2014 To 04/24/2015

2. Customer Category: Possible Range: From [Ordinary] To [VIP]  
From Ordinary To VIP

Preview Print Close

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

1. Event Date: Possible Range: From [04/24/2014] To [04/24/2015]  
From 04/24/2014 To 04/24/2015

2. Customer Category: Possible Range: From [Ordinary] To [VIP]  
From Ordinary To VIP

3. Print Options: ☐ All ☒ Top 20 ☐ Top 100

Preview Print Close

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

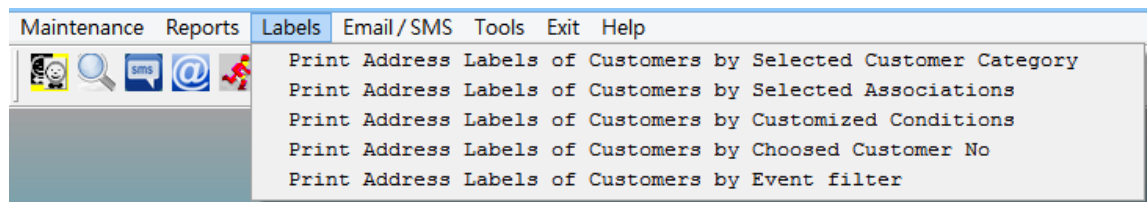
The amount comes from Customer's Event records.

## 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.

**Austen, Jane**

LibriVox  
4166 Village View Drive  
Frederick, MD 21701

↑ With Compnay Name

**Austen, Jane**

4166 Village View Drive  
Frederick, MD 21701

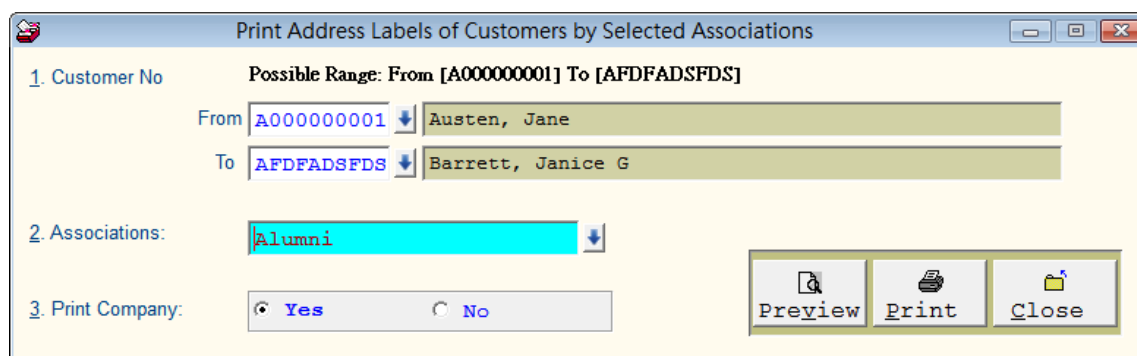
The dialog box titled 'Print Address Labels of Customers by Selected Customer Category' contains the following fields and controls:

- 1 Customer No.:** Possible Range: From [A000000001] To [AFDFADSFDS]. The 'From' field is set to 'A000000001' and the 'To' field is set to 'AFDFADSFDS'. The names 'Austen, Jane' and 'Barrett, Janice G' are listed next to their respective values.
- 2 Customer Category:** Possible Range: From [Ordinary] To [VIP]. The 'From' field is set to 'Ordinary' and the 'To' field is set to 'VIP'.
- 3 Print Order: By** Radio buttons for 'Customer No.' (selected) and 'Customer Category'.
- 4 Print Company:** Radio buttons for 'Yes' (selected) and 'No'.
- Buttons at the bottom right: 'Preview', 'Print', and 'Close'.

## Print the Selected Associations

Where to:

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



The screenshot shows a Windows-style dialog box titled "Print Address Labels of Customers by Selected Associations". It contains three main sections:

- 1. Customer No**: A label with a "Possible Range: From [A000000001] To [AFDFADSDFS]" above it. Below are two rows: "From" with a dropdown showing "A000000001" and a text field showing "Austen, Jane"; and "To" with a dropdown showing "AFDFADSDFS" and a text field showing "Barrett, Janice G".
- 2. Associations:**: A dropdown menu showing "Alumni" in red text.
- 3. Print Company:**: Two radio buttons, "Yes" (selected) and "No".

At the bottom right are three buttons: "Preview" (with a magnifying glass icon), "Print" (with a printer icon), and "Close" (with a folder icon).

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 Address Labels of Customers by Customized Conditions

1. Choose: 5 customers selecte Search and Select

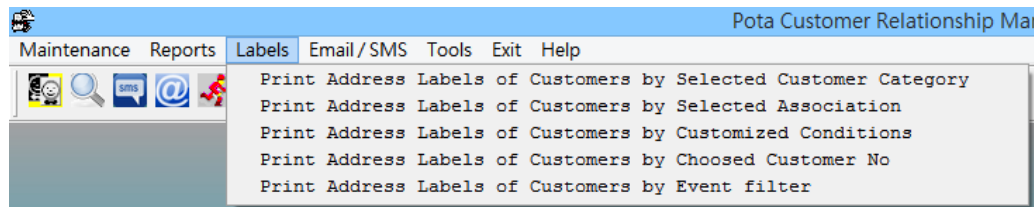
2. Print Company: ☒ Yes ☐ No

Preview Print Close

## Print by Chosen Customer No

Where to:

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



Print Address Labels of Customer by Chosed Customer No

1. Choose : A000000001 AFDFADSFD

2. Print Company: ☒ Yes ☐ No

Preview Print Close

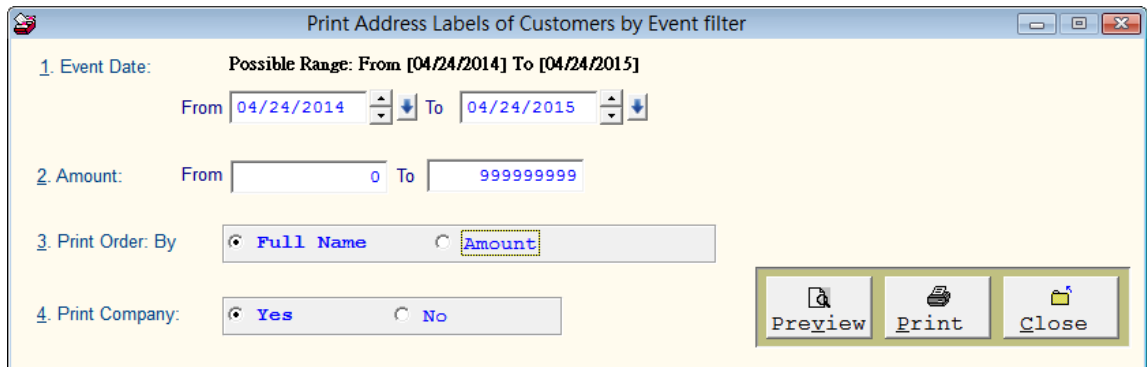
Note: If you want to select several Customer at once, please use chosen Customer number.” The window allows you to input the Customers which are not necessary to be continuous.

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



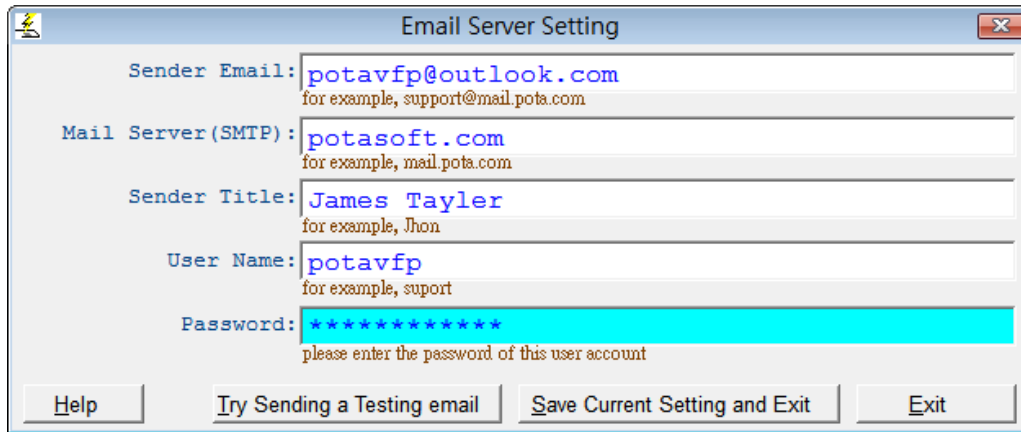
The screenshot shows a software window titled "Print Address Labels of Customers by Event filter". It contains four numbered filter sections and three action buttons at the bottom right.

- 1. Event Date:** Displays "Possible Range: From [04/24/2014] To [04/24/2015]". Below this, there are two date pickers: "From" with the date "04/24/2014" and "To" with the date "04/24/2015".
- 2. Amount:** Displays "From" with a numeric input field containing "0" and "To" with a numeric input field containing "999999999".
- 3. Print Order: By** A radio button group with two options: "Full Name" (selected) and "Amount".
- 4. Print Company:** A radio button group with two options: "Yes" (selected) and "No".

At the bottom right, there are three buttons: "Preview" (with a magnifying glass icon), "Print" (with a printer icon), and "Close" (with a window icon).

## 9. Mass Email

### Email Server Setting



The screenshot shows a dialog box titled "Email Server Setting" with a lightning bolt icon in the top-left corner and a close button (X) in the top-right corner. The dialog contains five input fields with labels and example text below them:

- Sender Email:** potavfp@outlook.com  
for example, support@mail.pota.com
- Mail Server (SMTP):** potasoft.com  
for example, mail.pota.com
- Sender Title:** James Tayler  
for example, Jhon
- User Name:** potavfp  
for example, suport
- Password:** \*\*\*\*\*  
please enter the password of this user account

At the bottom of the dialog, there are four buttons: "Help", "Try Sending a Testing email", "Save Current Setting and Exit", and "Exit".

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

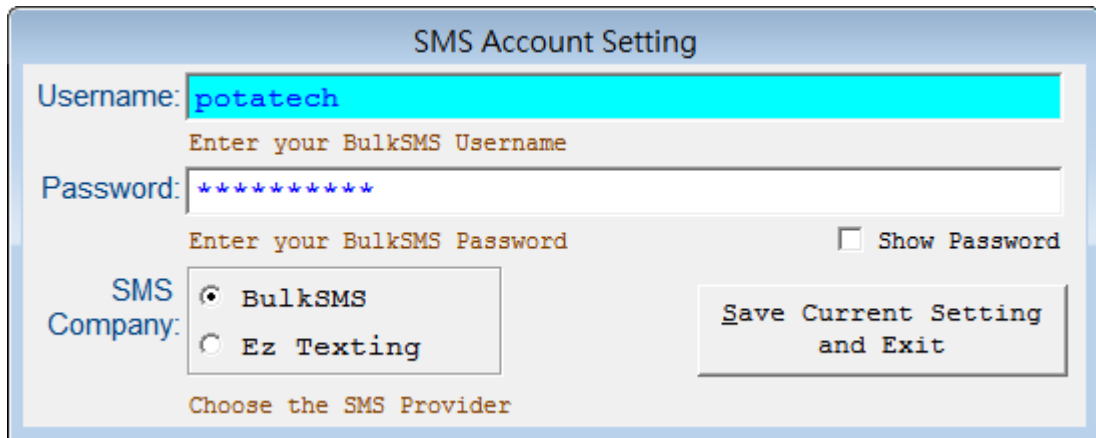


## 10. Bulk SMS

### SMS Account Setting

Where to:

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



The screenshot shows a web form titled "SMS Account Setting". It contains the following fields and controls:

- Username:** A text input field containing "potatech". Below it is a hint: "Enter your BulkSMS Username".
- Password:** A password input field showing ten asterisks. Below it is a hint: "Enter your BulkSMS Password". To the right of the password field is a checkbox labeled "Show Password".
- SMS Company:** A group box containing two radio buttons: "BulkSMS" (which is selected) and "Ez Texting". Below this group is a hint: "Choose the SMS Provider".
- Save Button:** A button labeled "Save Current Setting and Exit".

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/>

[illegible]

## 11. Mass Import/Export

### Import Customer Records from Excel

Where to:

Menu >Tools > Import Customer Records from Excel

**Import Customer Records from Excel**

\*\*\* Sample Structure of Importing Excel File \*\*\*

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Customer No	Salutation	First Name	M	Last Name	Gender	Home Phone	Fax	Cell Phone	Email	Customer Category	Address	Notes
2	A000000001	Ms	Janice	0	Barrett	Female			803-826-5991	Janice@example.com	VIP	4166 Village View Drive Frederick, MD 21701	
3	A000000002	Mr	Kana	A	Asano	Male	914-513-7619		515-219-5589	Kana@example.com	Ordinary	608 Mount Tabor New York, NY 10013	

Compatibilities of Excel Versions

Note: 1. Please refer to the upper sample Excel structure to fill the Excel file for importing records into system database. (1st row will be neglected.)  
 2. Allow to import 13 fields (from A to L) of the Customer records, please fill the data in the importing Excel file with the right order.  
 3. records with empty Customer number in the importing Excel file will be discarded, and will not add into the current database.  
 4. All Customer number data in the importing Excel file should be unique, records in the importing Excel file with non-unique Customer number will be discarded, and will not add into current database.  
 5. If the Customer number of the importing record has already existed in current database, it will be discarded and will not add into current database.  
 Remark: Import massive member records into database might change lots of data of system database. Suggest to backup the whole database before doing it.

Importing File: C:\MS22\000\RESERVE\DOC\EXCEL\CUSTOMER\_EXCEL\_20150408.XLS

Choose the Excel File for importing Load Excel Data in

Status	Customer No	Salutation	First Name	M	Last Name	Gender	Home Phone	Fax	Cell Phone	Email	Customer Category	Address
	A000000005	Ms	Janice First	0	Barrett Last Na	Female			803-826-599	Janice@example	VIP	4166 Village Frederick, M
	A000000006	Mr	Kana	A	Asano	Male	914-513-761			KanaAsano@exam	Ordinary	608 Mount T New York, S
	A000000007	Miss	Lara	J	Drum	Female	605-283-077			LaraDrum@exam	VIP	3997 Elm D Hosmer, SD
	XXXXXXXXXX	Mr	John		Johnson	Male	770-432-4931		818-718-888	john@johnson.com	Ordinary	297 Clay St

☐ Existing Customer number ☐ Empty Customer number ☐ Non-unique Customer number, will not add into database

Save to Database Close / Exit

Loaded Customer records for importing: 4 Customer records: 0 Customer records are not acceptable.

Acceptable records for importing: 4 Customer records: Replace the original record when importing the existing member number in database

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](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

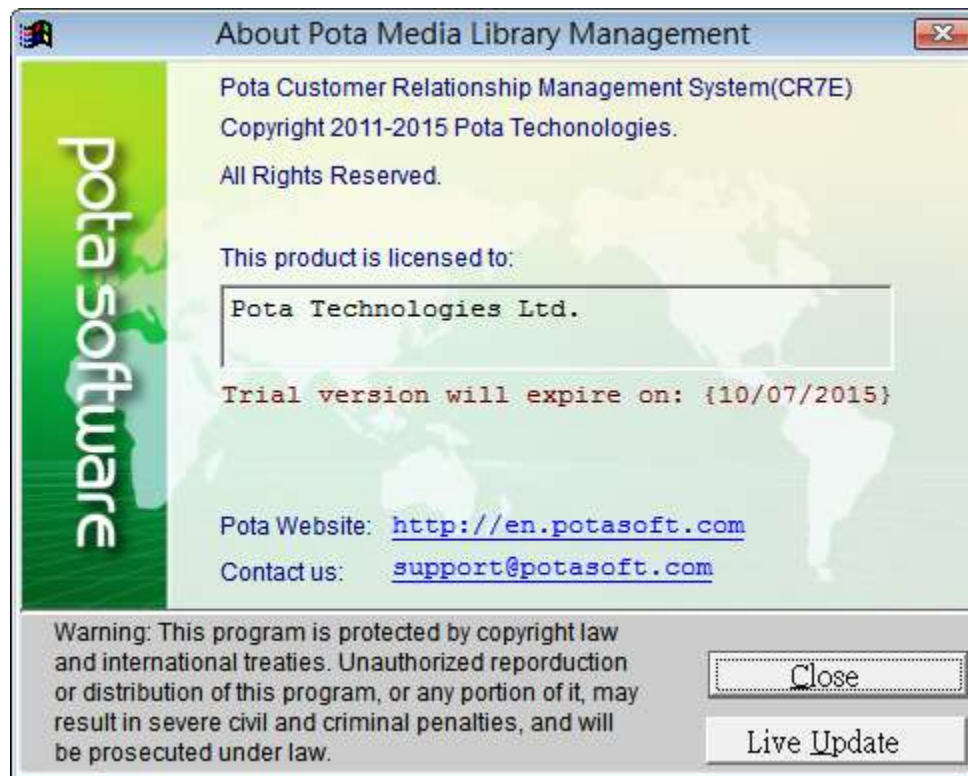


## 12. Live Update

### 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.

## **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](mailto:support@potasoft.com) or Skype ID: pota.soft