

POTA SOFTWARE | PACKAGES & CUSTOMER DESIGN

System Manual for CR7E

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 (<u>http://en.potasoft.com/</u>). 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

1

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.

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

3	Data Backup	
	s function will backup whole database (ectory.	to the assigned
	ase ensure all other users exit this sy outing this function.	yatem before
3.Det	a Backup will not change any data in de	stabase.
Database Name:	C1\BACR0F_M17E\20161223\	
Database Folder:	CI VIG 7EVDATABAREN	
Backup Folder:	Cr\BACRUP_MLTE\20141223\	
	C:\BACKUP_ML7E\20141223\ 12/23/2014 [08:47:15]	
Total Files:	57	
File Backuped:	0	
	22	

(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

	Restore Data	1010
	e function will restore whole databa kup directory.	as from the assigned
	ase ensure all other users exit this cuting this function.	system before
3.Cau	tion: It will replace all of your cu Backup data.	rrent data with the
Database Name:	DATABASE\MITE.OBC	
Database Folder:	C=\MLTE\DATABASE\	
From Backup Folder:	C-\RACHUP_HLTE\IO143223\	
	C:\BACKUP_ML7E\20141223\	
and the second se	12/23/2014 (00:47:15)	
Total Files:	57	
Files Restored:	9	
Rest Files:	- # 7	

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 Secondar > Add

or,

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

3		Customer Mainter	ance <view></view>			
	gingle Hec	ord		200	up Armonia	
Customer No. A0	00000005 22	Company: Company A for	testing purpose		Advanced Search	h d
First Name Jac	nice Test		Date of Birth	04/13/1987	Age 28 Gender 7mm	nla -
Last Name Ba	rrecc		Address	4166 Village V		-
Middle Initial G		CONTRACTOR AND		Frederick, ND	21701	
Salutation Ma		te of Entry: 04/13/2015				-
Home Phone: 15		Fax 5555-6667		Janice@example		8
Cell Phone 10	3-526-5991		Customer Category	VIP		
Notes			- Title			
			Association			
Contact Person		Contacter Phone			[" No Printing Label [" So Se	nding 385
		** Event **		Add Event		
Contraction of the second second second	matus.	Bried Rote	arthum.	dammart V +		52
• 04/13/2015 Cu	splated one year as	inite a state of the state of t	Gentige			52
						21
					11 >	7
						/
fecm 04/13/201	5 In 04/13/2015	Total: 1 1	otal Amunti	0	send SHS to this Cust	contra
Add Evens	1		Preview/Print	details	D Open Folder(0) Import A	ttactment
	-					uttoner
VIEW H	Frey Next Bo	ton Edit Add D			71970	PROVING
Tob	TTAX Fawe No	cton Edit Add D	el Sava Ind	c <u>Close</u>	Quick Search	3

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 **Shortcut** button: Click on the customer maintenance icon 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 Second 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

	<u>S</u> ingle Recor	d			<u></u>	oup Record	19	
Customer No A000000	006 12	Company: AT	6 1				Advanced	Search
First Name Janice	and the second	1		Date of Birth	09/10/1971	Age	+3 Gen	der Female
Last Name Barrett				Title	Adviser	-		TOTAL LINES
Middle Initiat G Fall	Manu: Barrett,	Janice G		Address				
Salutation Ma.	- Dote /	of Entry 04/0	9/2015					
Home Phone		Fax						
Cell Phone 803-826-	5991			Email	Janiceßexasp	le.om		
Notes			-	Customer Category	VIP			
			1.0	Associations	Trade			
ntact Person: Felicity			intacter Phone 42		-	TT Mr. Berley	ting Label [-
water Person. [religity	Young		Carlle Contract Street	In the second second		1 30 1110	cind raper 1	no benaring
		** Eve			Add Event		A STOR	The last
erni Date Statue	membership 20	Strief No	7 T. M	George	100	1		27
						19-	1 6	20
	3	Add E	vent recordBan	rett, Janice G			618	100 5
	1	2000000006		Date o	f Birth: 09/15/1	971	Age:	43
	1			Date o	f Birth: 09/15/1	971	Age: Gender: Fama	
	Customer No Company				f Birth: 09/15/1			
GRE 04/24/2014 To	Customer No Company	AT & T			Customer Catego			
	Customer No Company Email	AT & T			Customer Catego	Y VIP	Gender Fema	ula Onei
nt 09/24/2016 Te Add Event	Customer No Company Email	AT & T			Customer Catego	y VIP Phone	Gender Fema	110
Add Event	Customer No. Company Email Address	AT & T	mple.com		Customer Catego	y VIP Phone	Gender Fema	ula Onei
Add Event	Customer No. Company Email Address	AT & T Janice@exa	mple.com	Event *** Brief Note	Customer Catego	y VIP Phone Phone 203	Gender Fema	ute omez stacł
Add Event	Customer No. Company Email Address	AT & T Janice@exa	sple.com	Event *** Brief Note	Customer Catego	Phone 803	Gender Fema	ile onez stact
Add Event	Customer No. Company Email Address	AT & T Janice@exa	sple.com	Event *** Brief Note	Customer Catego	Phone 803	Gender Fema	ile onez stact
Add Event	Customer No. Company Email Address	AT & T Janice@exa	sple.com	Event *** Brief Note	Customer Catego	Phone 803	Gender Fema	ile onez stact
Add Event	Customer No. Company Email Address	AT & T Janice@exa	sple.com	Event *** Brief Note	Customer Catego	Phone 803	Gender Fema	ile onez stact
Add Event	Customer No. Company Email Address	AT & T Janice@exa	sple.com	Event *** Brief Note	Customer Catego	Phone 803	Gender Fema	ile onez stact
Add Event	Customer No. Company: Email: Address 04/24/2014	AT & T Janice@exa Status Completed	mple.com ••• membership 20	Event *** Brief Note	Customer Catego Home Cel	ry VIP Phone: Phone 103 Phone 103 Plandler cauge	Gender Pana -526-5991 Amount 1	ile omez stact
Add Event	Customer No. Company: Email: Address 04/24/2014	AT & T Janice@exa Status Completed	sple.com	Event *** Brief Note	Customer Catego Home Cel	ry VIP Phone: Phone 103 Phone 103 Plandler cauge	Gender Fema	ile omez stact
Add Event	Customer No. Company: Email: Address 04/24/2014	AT & T Janice@exa Status Completed	mple.com membership 20 04/24/2014	Event *** Brief Note	Customer Catego Home Cel	ry VIP Phone: Phone 103 Phone 103 Plandler cege	Gender Pana -526-5991 Amount 1	ile omez stact
Add Event	Customer No. Company: Email Address 04/24/2014 04/24/2014 Fcont 04. Insert per 1	AT & T Janice@exa Status Completed	mple.com membership 20 0 09/34/2014 d	Event *** Brief Note	Customer Catego Home Cel	ry VIP Phone: Phone 103 Phone 103 Plandler cege	Gender Pana -526-5991 Amount 1	ile omez stact
Add Event	Customer No. Company: Email Address 04/24/2014 04/24/2014 Forms 04. Insert new 1 Event D	AT 4 T Janice@exa Status Completed /24/2014 T Event recor	mple.com memberebip 20 0 09/34/2019 d	Event *** Brief Note 14 Total (1	Customer Catego Home Cat	ry VIP Phone 903- Mandler ozge	Gender Pana -826-5991 Amount 1 100 100	
Add Event	Customer No. Company: Email Address 04/24/2014 Devent Date D4/24/2014 Devent Date Devent D Han	AT 4 T Janica@exa Status Completed /24/2014 T Event recor offer 04/24/20 der George	mpl*.com *** membership 20 0 04/24/2014 d 015 • •	Event *** Brief Note	Customer Catego Home Cel	ry VIP Phone 903- Mandler ozge	Gender Pena -526-5991 Amount 1 100 Insert ct and close	
Add Event	Customer No. Company Email Address 04/24/2014 04/24/2014 Event Date Date Date Provide State Ham Brief N	AT & T Janice@exa Status Completed /24/2014 T Event recor Mate C4/24/2 der George Note members	mple.com membership 20 0 04/24/2014 d 015 + +	Event *** Brief Note 14 Total (1	Customer Catego Home Cat Ge Total Au	ry VIP Phone 903 Phone 903 Phandler corge	Gender Pana -826-5991 Amount 1 100 100	

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

Gustomer Maintena	nce <edit></edit>	OBR
gingle Record	deoug	Becords
Customer No. A000000006 72 Company: AT 6 T		•]
First / Edit / delete Event record	d(Barrett, Janice G)	ale •
Middle Event Date 04/26/2015	urt and al	
Home P Handler George + Amo Cell P Brief Note penbecehip-2015	int: 100 🛃	
Status @ Completed C Processing C St	spend (Unprocessed	elete and close
Contact Person Felicity Young	and the second sec	No Printing Label 🦵 No Sending SMS
** Byent ** Zeens Date Zietus Drief Hote	Edit Event	
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 Eve	ent	
From: 04/24/2014 To 04/24/2015 Total: 2 Tot	al Amount: 200	add / change photo
EDIT 14 4 4 H 3 D 34	ave Undo Close	Total 5 Customer

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.

3			Edit	Event record		10 B
Event record: Fro	Possible Ran	age: From [04/24/2014]	To (04/24/2015	Select starting date of editing:	Search Eve	nt record
Everil Date	Customer No	Full Stame	Status	Enter Note	Handler	Amount
04/24/2015	A000000006	Barrett, Janice	Completed	membership-2015	George	100
04/15/2015	A00000004	Stewart, Jade	Processing	any products , service or support	George	Ð
04/14/2015	A000000001	Barrett, Janice	Completed	membership	Ratharine	1,000
04/14/2015	A00000003	Drumm, Lora J	Completed	membership	Barvy	1,000
04/09/2015	A000000004	Stewart, Jade	Completed	Ireland in Spring: Weeklong 3-City Trip	George	8,000
	• ± Pag	/p PgDn 00001 of	00005		12	Lose
Customer det	tail:		Customer No	A000000006 Date of Birth 09/15/1971	Age 43 Gen	der Female
Full Name	Barrett, J	fantra G	and the second s		tion of the second	and the second second
		differe o	Home Phone	Address		
Tible	Adviser		Cell Phone	803-826-5991		
Customer Cat	egon VIP	C	Contact Person	Felicity Young		
Selected Eve	ant record	Event 1	Date: 04/24/2	015 + Handler George	Save the	e changes
Brief Note	membership	-2015		♣ Amount 100 ♣	Part and a second second	
		and the second		The second second	Derece r	he record
Status	@ Complete	ad C Processing	C Suspen	d C Unprocessed	<u>C1</u>	ose

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.

÷.		Add Event record to	o Customers		14-21	5	e 14
Todayı 04/1	6/2015 Choose: 4	customers selected	Search and Select		Close		
Number of Ch	owen for Emailing:	4 Add Event	record to Distoner	reminist onlugg the	der to so	it in	111
Cuntomer No	Full Name	Customer Category	Address (Righthcik	k to toggle row height)	Gehder	.X/14	+
A00000001	Barrett, Janice G	VIP	4166 Village View Driv	/e	Female	Y	
A00000002	Asano, Kana A	Ordinary	699 Mount Tabor		Male	Y	
A000000003	Drumm, Lora #	VIP	2807 Elsie Drive		Female	Y	Ť.
A00000004	Stewart, Jade	VIP	297 Clay Lick Road		Male	Ŷ	
	neert new Event record Event Date 12/15/201		cord(Total 4)	Insert			
	The second se	and the	1		- 1		-
	Handler Judz	Amo	unt 0 👲	Abort and close			
	Brief Note sending	hristmas cerds					
	Status @ Complet	ted (Processing (S	uspend (Unprocessed				
A A ¥	Poly Poly Dol of	Choose All	Unchoose All Choose	All the same Customer (Category		
Checked #	or Sending Notification	i Choose	Unchoose Unchoose	All the same Customer	Category	2	

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 is on the tool bar

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

Customer No. Ciear Customer Category: Ciear Gender Name Ciear Rem: Seak Firstname or Lastname. Trile Ciear Month /Day Cie Phone Ciear Rem: Seak Homephone or Cellphone. Date of Birth Year /Month /Day Cie Email Ciear Contact Person Ciear Contact Person Ciear Contact Person Ciear Ciear Associations Ciear Ciear Associations Ciear	*** Input t	the search (conditions ***			Begi	in to Search	h.
Phone Clear Res: Seek Homephone or Cellphone, Date of Birth Year / Month / Day Cle Email Clear Contact Person Clear Contact Person Clear Company:	Customer No.	Clear	Customer Category:		1.	• Clear	Gender:	
Email Clear Contact Person Clear Contact Person Company Clear Associations	Name		Clear Rem: Seek Firstnar	ne or Lastn	ame. Trile:			4 C1e
Company: Clear Associations Clear	Phone		Clear Ren: Seek Homephon	ne or Cellp	hone, Date of Birth: Ye	ar 7Mon	m /Day	Cle
	Email			Clear	Contact Person			Cle
Address Clear Notes Cle	Company:			• Clear	Associations			+ C1=
	Address			Clear	Notes			Cle

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

*** Inj	put the search	condit	tions **				Begin	n to Search
Customer No.	Clear	J	Customer (Category:			+ Clear	Gender
Name:		Clear	Ren: Seek	Firstname	or Last	name. Title		* _ Cle
Phone		Clear	Rem: Seek	Homephone	or Cel	Lphone, Date of Birth	Year /Mont	h /Day
Email					Clear	Contact Person	-	4 Cle
Company:	AT & T			+	Clear	Associations		4 Cle
Address					Clear	Notes		Cle
Event Date:	From / /	• To	7.7	<u>.</u>	Clear	Brief Note		
Customer No.	Full Name	Genider	Salutation	Home Pr	one	Cell Phone	Address (Right-clic	k to toggle row height)
FDFADSFDS	Barrett, Janice G	Female	Mar.			805-826-5991		
	-	-	-	-				
			-					
					1			
		-		-				
			1					
							1	
			1		-			
Totalc	1 Choose	AFDFA	DSFDS		J.	Choose and Exit	Drint / Dravia	Exit

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.

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:

Customer Cat	egory	Mainter	an	ce		On!	81	2
Customer Category		Respon	ini	ble (ffie	ez.		
Ordinary	Chri	latina						
Others.	Rosa	mind					-	
VIP	Poll	Ly.						1
Student							-	1
Discount 54								t.
								I
	-							1
								1
								1
							-	1
								1
								t
							-	1
	-		_			_	-	t
	-						-	h
	-		_	-	_	- 1		-
H 4 >	H	PgUp	P	gin	Add	6	Del.	
Record: 0005/0006		-	1		2.11		-	٦
			3	10	9	12	105	
Customer Categ	or y	Save		Une	io	2	1040	

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

2	Title Maintenance 📃 💷	x
	Title	
	Sister	
	Brother	
	Dr.	
▶	Prof.	

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

3		Contact Person Maintenance	-	
Contact Person	Contacter Phone	Job descriptions	<u> </u>	
 Alicia Keys 	917 934 3319			
Catherine Cookson				
Felicity Young	425-606-1234			
<u> </u>				
Record: 0001/0003		H + H Pgp Pgn Add Del Gran Wadd	1	
Contact Person		Save Undo	Close	
Preview/Print All Records				

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.

2	Handler Maintenance 📃 💷 🕰]		
	Handler	1		
	George	l		
	Harvy			
L	Judi			
L	Katharine	l		
Þ	Luke			
L		l		
L		l		
L		l		
L		l		
L				
┝				
┝	•			
Γ				
L	Image: Markov delta and the state of th			
1	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:

Brief Note Maintenance 23 No. Brief Note ٠ 0001 children chair 0002 living room chair 0003 Dressing table 0004 Ireland in Spring: Weeklong 3-City Trip any products , service or support -M ∢ ▶ \mathbb{H} Pg<u>U</u>p P<u>gD</u>n <u>A</u>dd Del Record: 0005/0005 ĸ Undo <u>C</u>lose Brief Note Save Preview/Print All Records

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.

3	Change Customer No	×
	Old Customer No: A00000006	
	Full Name: Barrett, Janice G	
	New Customer No: ASDFDFADFS	
	Change Customer No <u>C</u> lose	

Change Caption of Field

You can define the captions of the system.

Where to:

Tools menu > Change Caption of Field

Change caption of field	X			
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 captopn form "Associations" to Hobbies	Undo (Maximum 18characters 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	e 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.

8	List of Customers	
1. Customer No:	Possible Range: From [A000000001] To [AFDFADSFDS]	
Fro	M A00000001 📕 Austen, Jane	
То	AFDFADSFDS 🛃 Barrett, Janice G	
2. Customer Category:	Possible Range: From [Ordinary] To [VIP]	
Fro	m Ordinary	*
То	VIP	•
3. Print Order: By	• Customer No C Customer Category	
<u>4</u> . Phone:	• Home O Cell	Export to Excel
<u>5</u> . List Type:	• Breif C Detail	Image: Constraint of the second se

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."

. 01100	ose:	0 costomer	selec	ted	Search a	and Select	Ī	
					-			Export to Excel
List T	Type: 💽 1	Brief C	Deta	il		-	-	
Phon		Home C	Cell	,	ii I	D Preview	Print	Close
FIION	ie	nome	Cell			Preview	Princ	Crose
				Cus	tomer Advanced Se	arch		
	*** In	put the search	h condit	tions **	*	В	gin To Search(R	eset Last Result)
							egin To Search(R	
	Customer No.	Clea	d	Customer C	Category.		Clear	Gender Penale
	Name.		Clear	Ren: Seek	Firstname or Las	rtname. Titl	e:	Clear
	Phone	1	Clear	Rem: Seek	Homephone or Cel	Liphone - Date of Birl	h.Year /Mont	h /Day Clear
	Email	1			Clear	Contact Perso	01	• Clear
	Company.				and the second second	The second		
					Clear	Association	S:	4 Clear
	Address.				Clear Clear			Clear Clear
	N 6	From / /	÷ • To	/ /		Note	s	
	Address	From / / Full Name	Gender	/ / Balutation	Clear	Note	e l	Clear
	Address. Event Date				Clear Clear Home Phone	s Note Brief Not	e Address (Right-cli 1166 Village VI	Clear Clear k to toggie row height) key Dráve
	Address. Event Date: Dustomer No abbcobect abbcobect	Full Name Austen, Jane Drumn, Lora J	Gender Fenale Texale	Salutation Ma., Mico	Clear Clear	2 Note 2 Brief Not 2 Celi Phone 603-626-3991	e Address (Right-clu 1166 Village VI 2807 Elsis Driv	Clear Clear Clear Clear Clear Clear Clear Clear Clear
	Address. Event Date Clustomer No Aphocopolds	Full Name Austen, Jane	Gendar Fenale	Balutation Me ,	Clear Clear Home Phone	s Note Sheef Not Celi Phone	e Address (Right-cli 1166 Village VI	Clear Clear Clear Clear Clear Clear Clear Clear Clear
	Address. Event Date: Dustomer No abbcobect abbcobect	Full Name Austen, Jane Drumn, Lora J	Gender Fenale Texale	Salutation Ma., Mico	Clear Clear Home Phone	2 Note 2 Brief Not 2 Celi Phone 603-626-3991	e Address (Right-clu 1166 Village VI 2807 Elsis Driv	Clear Clear Clear Clear Clear Clear Clear Clear Clear
	Address. Event Date: Dustomer No abbcobect abbcobect	Full Name Austen, Jane Drumn, Lora J	Gender Fenale Texale	Salutation Ma., Mico	Clear Clear Home Phone	2 Note 2 Brief Not 2 Celi Phone 603-626-3991	e Address (Right-clu 1166 Village VI 2807 Elsis Driv	Clear Clear Clear Clear Clear Clear Clear Clear Clear
	Address. Event Date: Dustomer No abbcobect abbcobect	Full Name Austen, Jane Drumn, Lora J	Gender Fenale Texale	Salutation Ma., Mico	Clear Clear Home Phone	2 Note 2 Brief Not 2 Celi Phone 603-626-3991	e Address (Right-clu 1166 Village VI 2807 Elsis Driv	Clear Clear Clear Clear Clear Clear Clear Clear Clear
	Address. Event Date: Dustomer No abbcobect abbcobect	Full Name Austen, Jane Drumn, Lora J	Gender Fenale Texale	Salutation Ma., Mico	Clear Clear Home Phone	2 Note 2 Brief Not 2 Celi Phone 603-626-3991	e Address (Right-clu 1166 Village VI 2807 Elsis Driv	Clear Clear Clear Clear Clear Clear Clear Clear Clear
	Address. Event Date: Dustomer No abbcobect abbcobect	Full Name Austen, Jane Drumn, Lora J	Gender Fenale Texale	Salutation Ma., Mico	Clear Clear Home Phone	2 Note 2 Brief Not 2 Celi Phone 603-626-3991	e Address (Right-clu 1166 Village VI 2807 Elsis Driv	Clear Clear Clear Clear Clear Clear Clear Clear Clear
	Address. Event Date: Dustomer No abbcobect abbcobect	Full Name Austen, Jane Drumn, Lora J	Gender Fenale Texale	Salutation Ma., Mico	Clear Clear Home Phone	2 Note 2 Brief Not 2 Celi Phone 603-626-3991	e Address (Right-clu 1166 Village VI 2807 Elsis Driv	Clear Clear Clear Clear Clear Clear Clear Clear Clear
	Address. Event Date: Dustomer No abbcobect abbcobect	Full Name Austen, Jane Drumn, Lora J	Gender Fenale Texale	Salutation Ma., Mico	Clear Clear Home Phone	2 Note 2 Brief Not 2 Celi Phone 603-626-3991	e Address (Right-clu 1166 Village VI 2807 Elsis Driv	Clear Clear Clear Clear Clear Clear Clear Clear Clear
	Address. Event Date: Dustomer No abbcobect abbcobect	Full Name Austen, Jane Drumn, Lora J	Gender Fenale Texale	Salutation Ma., Mico	Clear Clear Home Phone	2 Note 2 Brief Not 2 Celi Phone 603-626-3991	e Address (Right-clu 1166 Village VI 2807 Elsis Driv	Clear Clear Clear Clear Clear Clear Clear Clear Clear

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

3	List of Customers by Entry Period		
<u>1</u> . Date of Entry:	Possible Range: From [04/06/2015] To [04/11/2015]		
	From 04/06/2015 • To 04/11/2015 •		
<u>2</u> . Phone:	• Home C Cell		Export to Excel
<u>3</u> . List Type:	• Breif O Detail	Dreview 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

3	List of Customers with no printing label/ no sending SMS	Mark		0 0 0
1. Customer No:	Possible Range: From [A000000001] To [AFDFADSFDS]			
From	A000000001 🛃 Austen, Jane			
То	AFDFADSFDS 🛃 Barrett, Janice G			
2. Customer Category:	Possible Range: From [Ordinary] To [VIP]		j.	Export to Excel
From	Ordinary 10 VIP	Da.	8	6
3. Print Order: By	@ Customer No C Customer Category	Preview	Print	Close
4. Label/SMS Setting	✤ No Printing Label C No Sending SMS C Ne	ither		

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

<i>t</i>	
😂 List of Ci	Sustomers 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	0 999999999
3. Print Order: By Customer No	C Amount
4. Phone: Home Phone	
<u>5</u> . List Type: © Breif C De	etail <u>Preview</u> <u>Print</u> <u>C</u> lose

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*Fu	ll Name	*Gender (Age) *	Home Phone	*Customer Category	* Amount
A00000001 Ms	. Austen, Jane	Female (43)	803-826-5991	VIP	6,600
A00000003 Mis	ss Drumm, Lora J	Female(47)	605-283-0778	VIP	2,200
A00000004 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

2	List of Customers by Event filter					
<u>1</u> . Event Date:	Possible Range: From [04/24/2014] To [04/24/2015]					
Fror	From 04/24/2014 🕂 To 04/24/2015 🔹					
2. Event record with :	• No records O records and zero-amount	O records and not zero-amount				
<u>3</u> . List Type:	@ Breif C Detail	Export to Excel				
<u>4</u> . Phone:	© Home Phone C Cell Phone	Image: Constraint of the second sec				

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

2	Event Count of Selected Customer Category	
1. Event Date:	Possible Range: From [04/24/2014] To [04/24/2015]	
Fror	m 04/24/2014 ▲ To 04/24/2015 ▲	
<u>2</u> . Customer Category: From	Possible Range: From [Ordinary] To [VIP]	Close
		<u></u>
<u>3</u> . Print Order: By	C Customer Category @ Event Count C Customer Count	

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 "04/24/2 Customer Category: From " Print Order: By "Event Co	'Ordinary" To "VIP"				
Customer Category * Event	t 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:



3	Event History of Selected Customer Category	
<u>1</u> . Event Date:	Possible Range: From [04/24/2014] To [04/24/2015]	
Fror	m 04/08/2015 🔹 F To 04/24/2015 🔹 🗣	
2. Customer Category:	Possible Range: From [Ordinary] To [VIP]	
Fron	n Ordinary 🛃 To VIP	Export to Excel
<u>3</u> . List Type:	© Breif C Detail	<u>C</u> lose

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 04/14/2015 Drumm, Lora J 04/14/2015 Austen, Jane 04/15/2015 Stewart, Jade 04/24/2015 Barrett, Janice G	Completed Completed Completed Completed Processing Completed	<pre>Ireland in Spring: Weeklong 3-City Trip membership membership any products , service or support membership-2015</pre>			

List of Event/Amount of Selected Customer

Where to:

Event Amount History of Selected Customer	
1. Customer No: A00000001	
Full Name: Austen, Jane ?	
2. Event Date: Possible Range: From [04/24/2014] To [04/24/2015]	
From 04/24/2014 • To 04/24/2015 •	Export to Excel
3. List Type: © Breif © Detail	Image: Constraint of the second sec

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

Customer No:"A00000001" [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

3	Sum of Event Amount History of Selected Contac	t Person	
<u>1</u> . Event Date: Fron	Possible Range: From [04/24/2014] To [04/24/2015]	A <u>Preview</u> <u>P</u> rint	° Close
2. Customer Category:	Possible Range: From [Ordinary] To [VIP]		
From	Ordinary To VIP	•	

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.

	te: From "04/24/2014" Category: From "Ordin						
======					======		
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

3	List of Most Amount of Selected Customer Category	- • 💌
<u>1</u> . Event Date:	Possible Range: From [04/24/2014] To [04/24/2015]	
From	n 04/24/2014 🕂 To 04/24/2015 🕂	
2. Customer Category:	Possible Range: From [Ordinary] To [VIP]	
From	Ordinary To VIP	
<u>3</u> . Print Options:	C All © Top 20 C Top 100	ඩ් lose

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 3 A000000003 Drumm, Lora J	VIP VIP	5 3	33,400 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

		Construction of the second		
Possible Range: From [A000000001] To [AFDFADSFDS]				
A00000001 🖣 Austen, Jane				
APDFADSFDS 🛃 Barrett, Janice G				
Possible Range: From [Ordinary] To [VIP]				
Ordinary	•			
VIP	•			
🕫 Custommer No. 🦿 Customer Category				
· Tes C No		Preview	Print	Close
	AGD0000001 Austen, Jane AFDFADSFDS Barrett, Janice G Possible Range: From [Ordinary] To [VIP] Ordinary VIP Custommer No. C Customer Category	AGD0000001 Austen, Jane AFDFADSFDS Barrett, Janice G Possible Range: From [Ordinary] To [VIP] Ordinary VIP Custommer No. C Customer Category	AGD0000001 Austen, Jane AFDFADSFDS Barrett, Janice G Possible Range: From [Ordinary] To [VIP] Ordinary VIP Custommer No. C Customer Category	AGD0000001 Austen, Jane AFDFADSFDS Barrett, Janice G Possible Range: From (Ordinary) To (VIP) Ordinary VIP Custommer No. C Customer Category

Print the Selected Associations

Where to:

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

3	Print Address Labels of Customers by Selected	Associations
1. Customer No	Possible Range: From [A000000001] To [AFDFAD:	SFDS]
	From A00000001 🛃 Austen, Jane	
	To AFDFADSFDS 🛃 Barrett, Janice G	
2. Associations:	Alumni 🔹	
<u>3</u> . Print Company:	© Yes C No	Image: Constraint of the second sec

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.

3	Print Address Labels of Custom	ers by Customized (Conditions		
<u>1</u> . Choose:	5 customers selecte	Search and Sel	ect		
<u>2</u> . Print Company:	C Yes C No		à Pre <u>v</u> iew	e rint	Close

Print by Chosen Customer No

Where to:

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

	Pota Customer Relationship Mar
Labels Email/SMS Tools Exit Help	
Print Address Labels of Customers	by Selected Customer Category
Print Address Labels of Customers	by Selected Association
Print Address Labels of Customers	by Customized Conditions
Print Address Labels of Customers	by Choosed Customer No
Print Address Labels of Customers	by Event filter
	Print Address Labels of Customers Print Address Labels of Customers Print Address Labels of Customers

3	Print Address Labels of Customer by Choosed Customer No
<u>1</u> . Choose :	A00000001 AFDFADSFDS Image: Comparison of the comparison of
<u>2</u> . Print Company:	Image: Weight of Model Image: Weight of Model Image: Weight of Model

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

8	Print Address Labels of Customers by Event filte	er 🗖 🗖 🗾 🗖
1. Event Date:	Possible Range: From [04/24/2014] To [04/24/2015]	
	From 04/24/2014 To 04/24/2015	
2. Amount:	From 0 To 999999999	
<u>3</u> . Print Order: By	© Full Name C Amount	
4. Print Company	Y: C No	Image: ConstraintImage: ConstraintImage: ConstraintImage: ConstraintImage: ConstraintImage: Constraint

9. Mass Email

Email Server Setting

*	Email Server Setting
	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: ************************************
	Help Iry Sending a Testing email Save Current Setting and Exit 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

4			Email		101	a 3
Send Emai	il to Customer of Choosed Customer(s)	f Choose Da	ta(open window)		Todayı 04/16	/2015
Numb	er of Chosen for Emailing	4 Beady for	r sending Email to Choosed C	ustomer	<u>⊈</u> lose	
Customer No.	Tull Hans	Costimer Category	Treil	Title	Gender Din	1178 *
a000000001	Barrett, Janice ö	VIP	Janice@example.com	ASviser	Female Y	
A000000002	Asano, Xana A	Ordinary	HanaAsanoSexample.com	Director	Male T	- 6
A000000003	Drumm, Lora J	VIP	Loralrums@example.com	Nanager	Female Y	
A00000004	Scewart, Jade	A15	Jade@example.com	Chairman	Hale T	
						-
						_
					_	-
					_	-
						-
						-
A 4	- 🗶 Pijiji PgDg 1003	=£ 004 Choose	All Onchoose All Cho	ose All the same Custo	omer Category	1
Checked :	for Sending Notificati	an Chor	ee Dachoose Vach	oose All the same Cust	comer Category	-

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.

group s	end out
Setting For Email Server:	
Sender Email: potavfp@outlook.com	Sender Title: James
Mail Server: mail.pota.com.tw	User Name: potavfp
Number of Chosen Customer for Sending Notificati	on: 4
Subject:	
Attachment:	Clear
*** Message ***	Help on Message Content
Happy birthday, <1>! We wish you another year of accomplishments, oppor	tunity, and personal growth!
*** Email content	preview ***
*** Email content prev	iew *** Close
Happy birthda, Janice!	<u> </u>
We wish you another year of accomy and personal growth!	lishments, opportunity,

10. Bulk SMS

SMS Account Setting

Where to:

Menu > Email/SMS > SMS Account Setting

	SMS A	ccount Setting	
Username:	potatech		
	Enter your BulkSMS Use	rname	
Password:	***		
	Enter your BulkSMS Pas	sword	Show Password
SMS Company:	 BulkSMS Ez Texting Choose the SMS Provide 	r	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/

Send Bulk SMS

Where to:

Menu > Email/SMS > Send SMS to Customer

ž.		Send	SMS(bulk sms)			-Le		4
Send SMS	to Customer					Today: 0	16/201	15
Number of Ch	cosed Customer(s):	Choose I	Data(open window)			00		
Number of Ch	osen for Enailing:	2 Beady	for sending SMS to	Choosed Customer	1	glose	i.	Į
Customer No	Full Name	Customer Categor	y Cell Phone	Cell Bhone(2)	Title	Gender	Send (T)	+
£000000003	Barrett, Janice G	VIP	803-826-5991	a stostanticera	Adviser	Female	Ŷ	
ADDDDDDDDDZ	Aseno, Hana A	Ordinary			Director	Male		
A000000003	Drunm, Lore J	VIP			Manager	Fenale		
A000000004	Stewart, Jade	VIP	618-219-5569		Chairman	Halm	¥	
						-	-	
× • •	Polis Pobe 003	at 004 Choc	se All Unchoose A	11 Chouse Al	1 the same Custo	mer Catego	iry	1
Checked I	for Sending Notificati	ion Ch	oose Unchoose	Unchoose A	11 the same Cust	omer Categ	ory	

11. Mass Import/Export

Import Customer Records from Excel

Where to:

Menu >Tools > Import Customer Records from Excel

10	A	B	C	D	- E	F	0	H	1		X		L	M
1	Customer Ho	Salutatio	n First H	ame M.	Low In	me Gender Ha	ene Phor	nt fat	Cell Phone	Ernail	Customer Categor	y Ad	drame	Hotes
2	A00000001	ML	Janice	0 6	Barrett.	Ferrole			803-826-5991	Janice@eicanple.com	VP	Frederick,		•
3	ADDDDDDDDDD	W	Kana	A /	Aziansi.	Male 25	4-513-761	9	515-219-5589	Kanagezanple.com	Ordinary	689 Mount New York	Tabor NY 10013	
	Compa	CIBILISI	as of R	aval Vas	winne	1		1.1	-			21	5	
	records in	er numbe	or data	in the Racel f.	Lapor	ting Eacel f ith hon-usig	ile shu pe Cust	ower m		Step 5. Clid	cted Excel file k (Bave to Datak the importing r			
4. 	discarded, All Custom records in will be di if the Custom database, import music	er numbe the log starded, tomar nu is will ve membe	or data norting and wi mber of be dist r mcords	in the Receif il not the im arded m into dat	Lapor ile w and i porti ad wi abase	ting Racel f ith Num-uniq num surrest ng surrest ha ll not wht i	ile shu pe Cust databas s alres nto cur lots of d	daer m n dy anti- trent o da of s	unber esed in Setabase, jotem datal	Step S. Click wave	k (Save to Datas the importing s ackup the whole da	tabase bef	nto datak bre doing i	888. L
4. arrent murk: portis	discarded, All Custom records in will be di lf the Custom fatabase, import mutan- ng File: Cut	er numbe tile ing mounded, tomar nu is will s membe (Héllé)(P	er data orting and us offer of the disc resconds	in the Receif f 11 not 1 the im carded a 5 into dat	Lapor Lle v and L porti abase _CEVI	ting Racel f ith son-only nto ourrest ng secord ha il not edd s might change sociationes ra	Lie shu pe Cust databas s alres nto cur hots of d comi_sol	dawr n w dy anir trant d ats of sy	antesi elect La catabase pitem datat atta	Step S. Click and Suggest to be Qhoose the	k (Bave to Optak the importing t ackup the whole da	tabase bef	one dang i	ene. L
4. 	discorded, All Conton records in whill be di- lif the Cur database, Import musaw ng File Cur un Curtur	er numbe the ing enarched, tomar nu its will the will (Hells) (P	r data orting and ul mber of be disc r mcords	in the Receif f 11 mm - t the import sints dut sints dut Find Nar	Lapor Lie w and i porti abase 	ting Excel f ith non-uniq no current ng second ha ll not eff s might change scinetimets_ex LastName	Lie shu pe Cust databas s alres nts cur lots of d com	daner m dy entr trent of state of sy 160-406	antes : esent La catabase potem datat atta	Step S. Click ave Suggest to be Choose the subscription	k (Save to Dutat the importing t schop the whole da Excel File for im Empl	tabase bef porting Quatemen	teo datab ore doing i Load Ex Category	KIR- Cel Data Advess
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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

3	Export All Customer F	Secords to Excel	016
Target Folder: C:\D	sers\Desktop\DOC_CR7E		
Target Filename: Cust	omer_Excel_20150413		
Total:	4 Customer(s)	gave to Excel	Close

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).

A	About Pota Media Library Management	X
Pot	Pota Customer Relationship Management System(CR7E) Copyright 2011-2015 Pota Techonologies. All Rights Reserved.	
D	This product is licensed to:	
S S	Pota Technologies Ltd.	
ftware	Trial version will expire on: {10/07/2015}	
2	Pota Website: http://en.potasoft.com	
	Contactus: support@potasoft.com	
and interna or distribut result in se	his program is protected by copyright law ational treaties. Unauthorized reporduction ion of this program, or any portion of it, may evere civil and criminal penalties, and will ited under law.	

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 (<u>http://en.potasoft.com/</u>) 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