

POTA SOFTWARE | PACKAGES & CUSTOMER DESIGN

System Manual for CR7E

POTA Customer Relationship Management System(CR7E)

© Pota Software Pota Technologies Ltd. E-mail: support@potasoft.com

Table of Contents

| 1. Introduction | 1 |
|---|------|
| Our Team | 1 |
| Understanding the Trial Period | 1 |
| Get Helped | 2 |
| The Product - CR7E | 2 |
| 2. Data administration | 3 |
| Back Up Your Data | 3 |
| Restore Your Data | 4 |
| Rebuild or Re-index Your Data | 4 |
| 3. Customer Maintenance | 5 |
| Add a new customer | 5 |
| Edit/update customer data | 6 |
| Delete a customer | 6 |
| Edit Group Customer Records | 7 |
| 4. Contact Event | 8 |
| Add a new Event | 8 |
| Edit/Delete Event Records | 9 |
| Edit/Delete Event Records - listed by date | 10 |
| Add Event Records to Selected Customers | 11 |
| 5. Advanced Search | 12 |
| Customer Advanced Search | 12 |
| Quick Search | 13 |
| 6. Other Settings | 14 |
| Customer Category Maintenance | 14 |
| Customer Title Maintenance | 15 |
| Contact Person Maintenance | 15 |
| Association Maintenance | 16 |
| Handler Maintenance | 16 |
| Brief Note Maintenance | 17 |
| Change Customer No | 17 |
| Change Caption of Field | 18 |
| 7. Reports | 19 |
| List of Customers | 19 |
| List of Customers by Customized Conditions | 20 |
| List of Customers of Selected Day of Entry | 21 |
| List of Customers Marked No-Printing-Label or No-Sending-SM | 1S22 |
| List of Customers of Ranged Amount | 22 |

| List of Customer of Event Records & Amount | 23 |
|---|----|
| Number of Event Records of Selected Customer Category | 23 |
| List of Events of Selected Customer Category | 24 |
| List of Event/Amount of Selected Customer | 25 |
| Total Amount of Selected Contact Person | 26 |
| List of Amount Ranking by Selected Customer Category | 27 |
| 8. Printing Address Labels | 28 |
| Print the Selected Customer Category | 28 |
| Print the Selected Associations | 29 |
| Print Address Labels by Customized Conditions | 29 |
| Print by Chosen Customer No | 30 |
| Print by Ranged Amount | 31 |
| 9. Mass Email | 32 |
| Email Server Setting | 32 |
| Send Email to Customers | 32 |
| 10. Bulk SMS | 34 |
| SMS Account Setting | 34 |
| Send Bulk SMS | 35 |
| 11. Mass Import/Export | 36 |
| Import Customer Records from Excel | 36 |
| Export All Customer Records to Excel | 37 |
| 12. Live Update | 38 |
| Live Update | 38 |
| 13. How to Buy | 39 |
| | |

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

| 2 | Data Backup | 0/8 |
|---|---|-----------------|
| Remark: 1.Thi dir | s function will backup whole database ectory. | to the assigned |
| 2.Ple exe | ase ensure all other users exit this s cuting this function. | ystem before |
| 3.Det | a Backup will not change any data in d | atabase. |
| Database Name: | Cr\BACINIF_HL18\20161223\ | |
| Database Folder: | CT (HE TE (DATABASE) | |
| Backup Folder: | C:\BACKUP_MLTE\20141223\ | |
| Last Backup Folder: Lest Backup Time:: | C:\BACMUP_ML7E\20141223\ 12/23/2014 [08:47:15] | |
| Total Files: | 57 | |
| File Backuped: | 0 | |
| | | |

(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 | 1018 |
|-----------------------|---|----------------------|
| Remark: 1.This bac | e function will restore whole databa Mup directory. | as from the assigned |
| 2.Ples | ase ensure all other users exit this outing this function. | system before |
| 3.Cau | tion: It will replace all of your cu Backup data. | rrent data with the |
| Database Name: | DATABASE VHITE, DBC | |
| Database Folder: | C-VRLTEVINTABASEN | |
| From Backup Folder: | C-VERCHUP_HLVEVIOL41223V | |
| Last Backup Folder: | C:\BACKUP_ML7E\20141223\ | |
| Last Backup Time:: | 12/23/2014 (08:47:15) | |
| Iotal Files: | 57 | |
| Files Restored: | u. | |
| Rest Files: | - P 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 Short he tool bar > Add

or,

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

| 3 | Customer Maintenan | ce <view></view> | |
|---------------------------|---------------------------|-------------------------|--|
| 24 | ngle Necord | | genup Aspends |
| Customer No. A000000005 | 22 Company A for te | rting purpose | Advanced Search |
| First Name Januce Test | | Date of Bith: 01/13/198 | Apt 28 Gonder Female |
| Last Name Barrett | | Address 4166 7111 | age View Drive |
| Mittle Initiat a Pull Sam | r) Barrett, Janice Test O | Frederick. | , MD-21701 |
| Solutation Ma. | Date of Entry: 04/13/2015 | | <u>ل</u> ت |
| Home Phone: 1555-6666 | Fax: 5555-6667 | Email JaniceBea | apis.com 🛛 |
| Cell Phone: 803-826-5991 | | Customer Category VIP | |
| Notes | | Title | |
| | <u>ات</u> | Association | |
| Contact Person | Contacter Phone | | [" No Printing Label [" Sn Sending 385 |
| | ** Event ** | Add Event. | |
| Event Date Status | Brief Brite | Renative demonstra | |
| +04/13/2013 Completed one | Assi wamperanth | Gentade. | |
| | | | |
| | | | |
| | | | |
| | | | |
| Fermi 04/13/2015 In 04/15 | 1/2015 Intal: 1 Inta | 1 Amount : | 0 send SHS to this Customer |
| Add Event | | Preview/Print details | D Open Folder (0) Import Attachment |
| | | | |
| VIEW H 4 | | | Total: 6 Customer |
| Tob Free Fe | two Boerow Fast Vog Der | Sava Tugo Clos | Guick 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 **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

| | | | | the second se | | | | | |
|---|---|--|---|---|---|--|---|---|--|
| | <u>S</u> ingle Recor | d | | | 10 | coup Record | te: | | |
| Customer No 2000000 | 06 22 | Company: AT | 6 17 | Advanced Search | | | | | |
| First Name Janice | and a cateral | 1 | | Date of Beth | 09/10/1971 | Age | +3 Gen | der Female | |
| Last Name Barrett | | 1 | | Title | Adviser | | | The Berr Hanness | |
| Middle Initiat G Fall | Mana: Barrett, | Janice G | | Address | | | | | |
| Salutation Ma- | - Dote (| of Entry 04/0 | 9/2015 ÷ | | | | | | |
| Home Phone | | Fax | | | | | | | |
| Cell Phone 803-826- | 1991 | | | Email | JaniceBesas | ple.cum | | | |
| Notes: | | | 1 | Customer Category | VIP | | | | |
| | | | - | Associations | Trade | | | | |
| ntact Person: Felicity | Young | Co | entacter Phone: 421 | -606-1234 | - | T No Prin | ting Label [| No Sending | |
| CALLS & SALAR AND | nakat di | ** Ev | ent ** | | Add Event | | - | | |
| ents liste Statue | | Seine No | 100 | danniler | Include: | | 100 | ents | |
| 1/24/2014 Completes | membership 20 | 014 | | George | 100 | CEF | 1 | 15 5 | |
| | a | Add F | vent record. Ram | ett. Janice G | di dha | | | 1000 | |
| | | PAUL E | The second and det | AND | | | 1000 | | |
| | Customer No | 2000000006 | | Date o | Bith De/15/2 | 971 | Age: | 43 | |
| | Customer No | A000000006 | | Date o | (Birth: 09/15/1 | 971 | Age: Gender: Tan | 43 | |
| | Customer No Company Email | A000000006 AT 4 T | mie.com | Date o | (Birth: 09/15/1 | 971 | Age: Gender: Fama | 43 | |
| 04/24/2016 70 | Customer No Company Email | A000000006 AT & T JaniceBexa | mple.com | Date o | f Birth: 09/15/1 Customer Catego | 971 Ny VIP | Age: Gender Fame | 43 | |
| m: 04/24/2014 To | Customer No Company Email Address | A00000006 AT & T JaniceSexa | mple.com | Date o | f Birth 09/15/1 Customer Catego | 971 Py VIP Phone 813 | Age: Gender Fema | 43 11e 0me1 | |
| at 04/24/2014 To Add Event | Customer No Company Email Address | A00000006 AT 4 T JaniceBexa | mple.com | Date o | f Birth: 09/15/1 Customer Catego | 971 Pry VIP Phone 103- | Age: Gender: Fama | 43 Lis Date | |
| n 04/24/2014 Te Add Event | Customer No Company Email Address | A00000006 AT s T Janice@exa | mple.com | Date o | f Birth: 09/15/1 Customer Catego - Homs - Cel | 971 bry VIP e Phone 803- Handler | Age: Gender: Pana -826-5991 Amount | 43 Lie Die Taci | |
| RE 04/24/2014 Te Add Event | Customer No Company Email Address Event Data 04/24/2024 | A00000006 AT 4 T JaniceSexa Status Completed | mple.com *** membership 201 | Date o | f Birth: 09/15/1 Customer Catego - Homa - Cel | 971 Pry VIP e Phone 103- Handler scorpe | Age: Gender: Fena -826-5991 Amount 1 | 43 cle Date Clack Clack Clack Clack | |
| EW IA great | Customer No Company Email Address Exent Dais 04/24/2014 | X00000006 AT 4 T Janice@exa Status Completed | mple.com *** membership 201 | Date o Event *** Brief Note | f Birth: 09/15/1 Customer Catego - Home - Cel | 971 Pry VIP e Phone 103- Handler ecorge | Age: Gender: Fema -526-5991 Amount | 43 ele Drac? | |
| Add Event | Customer No Company Email Address Event Data 04/24/2014 | ACOCCOCCCC AT 4 T Janice@exa Status Completed | mple.com *** membership 201 | Date o Event *** Erief Note | t Birth: 09/15/2 Customer Catego - Home - Ce | 971 hry: VTP e Phone: 1 8 Phone: 103- Plandler eccide | Age: Gender: Fema -826-5991 Amount | 43 LLe Distant Start | |
| Add Event | Customer No Company Email Address 04/24/2024 | X00000006 AT 4 T Janice@exa Status Completed | mple.com *** membership 201 | Date o Event *** Brief Note | t Birth: 09/15/2 Customer Catego - Homs - Ce | 971 Ny VIP e Phone 103- Handler ecctue | Age: Gender: Fema -826-5991 Amount | 43 che che che che che che che che che che | |
| EN IA Pre- | Customer No. Company Email Address 04/24/2024 | X00000006 AT 4 T Janice@exa Status Completed | mple.com *** membership 201 | Date o Event *** Brief Note | t Birth: 09/15/2 Customer Catego Homs Cel | 971 Pry VIP e Phone 803- Handler eccide | Age: Gender: Fema -826-5991 Amount 1 | 43 Lie Ciaci Ciaci | |
| EN IG Pre | Customer No. Company Email Address 04/24/2014 | X00000006 AT 4 T Janice@exa Status Completed | mple.com *** membership 201 | Date o Event *** Brief Note | t Birth: 09/15/2 Customer Catego Home Cel | 971 Ny VIP e Phone 903- Handler eccipe | Age: Gender: Fema -226-5991 Amount | 43 Lie Cael Clael | |
| EN ASS Event | Customer No. Company Email Address 04/24/2014 | X00000006 AT 4 T Janice@exa Status Completed | mple.com *** membership 201 | Date o | t Birth: 09/15/2 Customer Catego Home Cel Ge | 971 Ny VIP e Phone 903- Handler eccije | Age: Gender: Fema -326-5991 Amount 1 | 43 Lie Dne: Liach | |
| EN A | Customer No. Company Email Address 04/24/2024 04/24/2024 Company Company Provide Company Compa | X00000006 AT 4 T Janice@exa Status Completed /24/2014 T Event recor | mple.com *** membership 201 | Date o | t Birth: 09/15/2 Customer Catego Home Cel Ge Ge Tecs1 A | 971 Ny VIP e Phone 903- Handler eccije | Age: Gender: Fema -826-5991 Ameunt 1 | 43 Lie Dne: Ltarf | |
| Add Event | Customer No Company Email Address 04/24/2014 Event Dais 04/24/2014 Formt Off. Insert new I | X00000006 XT & T Janice@exa Status Completed /24/2014 T Event recor | mpl*,com *** membership 201 0 04/24/2014 d | Date o | t Birth: 09/15/2 Customer Catego Home Cel Ge Ge Total - A | 971 Pry VIP e Phone 903- Handler ec=ge mount1 | Age: Gender: Fema -826-5991 Amount 1 100 | 43 Lie Die Carl Stor | |
| RE 04/24/2018 To Add Event | Customer No Company Email Address 04/24/2014 Event Dais 04/24/2014 Fcont 04 Event D | X00000006 XT & T Janice@exa Status Completed /24/2014 T Event recor- | mpl*,com *** membership 201 s 09/24/2019 d | Date o | t Birth: 09/15/2 Customer Catego Home Cel Ge Ge Tottal-A | 971 Pry VIP e Phone 903- Handler ec:ge mount: | Age: Gender: Fema -826-5991 Amount 1 1 100 Insert | 43 Lie Die Ctar? | |
| EW I Press | Customer No Company Email Address 04/24/2014 Event Dais 04/24/2014 Event D Event D Han | X00000006 XT & T Janice8exa Status Completed /24/2014 T Event recor- ate 04/24/20 dec George | mpl*,com *** membership 201 s 04/24/2014 d 015 • • | Date o | t Birth: 09/15/2 Customer Catego Homy Cel Ge Ge Tetral-A | 971 Pry VIP e Phone 903- Handler eccue | Age: Gender: Fema -826-5991 Amount 1 100 Insert rt and close | 43 Lie Die Ctar? | |
| EN IG Press | Customer No Company Email Address 04/24/2014 Denne 04 Insert new 1 Event D Ham Brief N | X00000006 AT 4 T Janice@exa Status Completed //24/2014 T Event recor- ate 04/24/20 der George tote memberal | mple.com membership 201 004/24/2014 d 015 | Date o | t Birth: 09/15/2 Customer Catego Homu Cel Ge Ge Ge Total - A | 971 Pry VIP e Phone 803- Handler eccue | Age: Gender Fema -526-5991 Amount 1 100 Insert ct and close | 43 LLe DIE DIE DIE DIE DIE DIE DIE DIE DIE DIE | |

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

| 3 Custom | er Maintenance <edit></edit> | | OBR |
|---|-----------------------------------|---------------------|------------------|
| gingle Record | | droup Records | |
| Customer No. A00000006 22 Company: AT 4 | T | 4 | |
| First Edit / delete | e Event record(Barrett, Janice G) | | ale • |
| Niddle Event Date 04/24/2015 + | Amount Concerns | | |
| Cell P Brief Note: penbership-2010 | J Another 100 2 | Aport and of | |
| Status & Completed C Process | sing C Suspend C Unprocess | Delete and cl | |
| Contact Person Felicity Young | ter Phone: 425-606-1234 | F No Printing Label | ₩ No Sending 383 |
| Parent Date Vistor December 1010 | Harritan | It Event | (ST-2) |
| 04/24/2015 Completed membership-2015 | George | 100 | 15 26 |
| Click the event that you want to edi | t>>Edit Event | |)) |
| From: 04/24/2014 To 04/24/2015 Total: | 2 Total Amount: | 200 add / chang | e photo |
| EDIT H H F H H H H Zdit 2 | 이 목 교 · Add Rel Save Endo | si Total Close | 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 m 04/29/201 | ge: From [04/24/2014] | To (04/24/2015 | Select starting date of editing: | Search Eve | nt record |
| Everil Date | Customer No | Full Stame | Status | Erter Note | Handler | Amount |
| 04/24/2015 | A000000006 | Barrett, Janice | Completed | pembership-2015. | George | 100 |
| 04/15/2015 | A000000004 | Stewart, Jade | Processing | any products , service or support | George | Ð |
| 04/14/2015 | A000000001 | Barrett, Janice | Completed | membership | Katharine | 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 |
| | • • • Pad | P PgDn 00001 of | 00005 | | 2 | Loge |
| Customer det | tail: | | Customer No | Date of Birth 09/15/1971 | Age 43 Gen | der Female |
| Full Name | Barrett, d | fantes G | | | variation and | and Transfer |
| | (Derreve) e | ditta a | Home Phone? | Address | | |
| Tible | Adviser | | Cell Phone | 803-826-5991 | | |
| Customer Cat | agon AIb | 1 | Contact Person | Felicity Young | | |
| Selected Eve | ant record | Event 1 | Date: 04/24/2 | 015 🕂 🕴 Handler George | · Save the | e changes |
| Brief Note | menherahin | -2015 | | al Amount 100 4 | Delete a | |
| | and the second party of th | (exec | | The second second | Devece r | he record |
| Status | @ Complete | d C Processing | C Suspen | d C Unprocessed | | 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.

| ž. | | Add Event record to | o Customers | | 14-2 | 5 | e. 34 |
|--------------|---|----------------------------------|-----------------------|---------------------------|-----------|-------|-------|
| Today: 04/3 | 6/2015 Choose: 4 | customers selected | Search and Select | | Close | | |
| Number of Ch | towen for Emailing: | 4 Add Event | record to Distoner | reminister onlugg bea | ter to so | it is | 111 |
| Cuntomer No. | Full Name | Customer Category | Address (Rightsa | ick to toggle row height) | Gender | .Y/II | + |
| A00000001 | Barrett, Jamice G | VIP | 4166 Village View Dri | ve | Female | Y | |
| A000000002 | Asano, Kana A | Ordinary | 699 Mount Tabor | | Male | ¥ | |
| A000000003 | Drumm, Lors # | VIP | 2007 Elsie Drive | | Female | Y | |
| A00000004 | Stewart, Jade | VIP | 297 Clay Lick Road | | Male | Ŷ | |
| | neert new Rvent record (Event Date 12/15/2014 | Insert new Event re Total 4) | cord(Total 4) | Insert | | | |
| | Brief Note Gendling Ch | • And | sunc] B 🖭 | Abort and close | -1 | | |
| | Status © Complete | ad (Processing (S | uspend (Unprocessed | | | | - |
| | | | | | | | |
| E-Charled I | for Sanding Notification | Choose 811 | Unabase Dashase | All the same Customer C | Caregory | | |
| | tor sensing desireducion | Frome | Zincostre Gildhoup | to man the selle cubcomer | receipty | _ | |

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."

| input t | he search co | onditions ** | | | | Beg | in to Search | 0 |
|-------------|--------------|-----------------|-----------|-----------|---|---------|--------------|-------|
| Customer Na | Clear | Customer (| Category: | | | Clear | Gender: | |
| Name | | Clear Rem: Seek | Firstname | or Lastna | ne. Trie | | | 4 C14 |
| Phone | | Clear Ren: Seek | Bomephone | or Cellph | one. Date of Birth: Y | ear /Mo | nth /Day | Cle |
| Email | | | | Clear | Contact Person | | | . C1e |
| Company: | | | | Clear | Associations | | | + C1+ |
| 2000 | | | | | Property of the second s | | | |

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

| *** Inj | put the search | condit | ions ** | | | | Begin | n to Search |
|--------------|-------------------|------------|------------|-----------|---------|-----------------------|---------------------|-------------------------|
| Customer No. | Clear | Customer 0 | Category | | | + Clear | Gender: | |
| Name: | | Clear | Ren: Seek | Firstname | or Last | name. Title | | + C1 |
| Phone | | Clear | Rem: Seek | Homephone | or Cel | Lphone, Date of Birth | Year (Mont | h /Day |
| Email | | | | | Clear | Contact Person | - | 4 c1 |
| Company: | AT & T | | | + | Clear | Associations | | 4 c1 |
| Address | | | | | Clear | Notes | | C1 |
| 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 | Har. | | | 805-826-5991 | | |
| | - | - | - | - | | | 1 | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | <u>.</u> | | - | - | | | | |
| | | | | - | - | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | - | | | |
| Totale | 1 | AFDEA | DSFDS | | 1 | Choose and Fact | Deine / Dennis | Fair |

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 | Mainten | ance | 10 | 1 3 1 | 5 |
|--------------------------------------|-------|---------|----------|---------|----------|---|
| Customer Category | | Respon | withle (| ficer | | • |
| Ordinary | Chrl | stips | | | | |
| Others. | Rosa | mind | | | | |
| VIP | Po11 | y. | | | | |
| Student | | | | | | |
| Discount 5% | | | | | | |
| | _ | | | | | |
| | | | | | _ | |
| | _ | | | | _ | |
| | - | | | | | |
| | | | | | _ | |
| | | | | | | - |
| H A F | н | FgUp | Pggn | Add | Rel | Ĩ |
| Record: 0005/0006 Customer Catego | ory | Save | Und | n do | Di Close | |
| Preview | /Pri | nt All | Reco | rds | | 1 |

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. | |
| | | Î |

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 | - |
| | Alicia Keys | 917 934 3319 | | |
| L | Catherine Cookson | | | |
| L | Felicity Young | 425-606-1234 | | |
| | | | | |
| L | | | | |
| L | | | | |
| L | | | | |
| F | | | | |
| ┝ | | | | |
| ⊢ | | | | |
| ⊢ | | | | |
| ⊢ | | | | |
| ┝ | | | | |
| ╟ | | | | |
| ⊢ | | | | |
| Iŀ | | | | |
| Iŀ | | | | |
| | | | | 1 1 |
| | Record: 0001/0003 | | M A N Pollo Pollo add pel 🗟 🕫 | |
| | Contact Person | | Save Undo | Close |
| 1 | | | 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 | | | |
| | George | | | |
| | Harvy | | | |
| L | Judi | | | |
| L | Katharine | | | |
| Þ | Luke | | | |
| L | | | | |
| L | | | | |
| L | | | | |
| ┝ | | | | |
| ┝ | | | | |
| ┝ | | | | |
| ┝ | | | | |
| E | · · · · · · · · · · · · · · · · · · · | 1 | | |
| | Image: Non-State Image: Non-State | r | | |
| | 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 fiel | d 💌 |
|--|--|
| 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 charac | ters A-z, 0-9, and space. |
| 2. You must restart the application to apply the | se 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.

| 3 | List of Customers | |
|-----------------------|---|--|
| 1. Customer No: | Possible Range: From [A000000001] To [AFDFADSFDS] | |
| From | A00000001 🛃 Austen, Jane | |
| То | AFDFADSFDS 🛃 Barrett, Janice G | |
| 2. Customer Category: | Possible Range: From [Ordinary] To [VIP] | |
| From | Ordinary | * |
| То | VIP | • |
| 3. Print Order: By | Customer No Customer Category | |
| <u>4</u> . Phone: | • Home C Cell | Export to Excel |
| <u>5</u> . List Type: | © Breif C Detail | In a an |

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."

| No. of Concession, Name | ose: | 0 costomer | selec | ted | Search a | and Select | | |
|-------------------------|--|---|---|--|---|---|--|--|
| | | | | | - | | | Export to Excel |
| List T | ype: 💽 1 | Brief C | Deta | il | | | - | - |
| | | | | | ii ii | <u>a</u> | 8 | 1 |
| Phon | ie: 💽 1 | Home C | Cell | | | Preview | Print | Close |
| | 6 | | | Cust | tomer Advanced Se | arch | | |
| | *** In | put the searc | h condit | tions ** | * | | egin To Search(Re | set Last Result) |
| | | | | | | | egin To Search(Re | op Last Regular |
| | Customer No. | Clea | | Customer C | Category. | | Clear | Gender Penale - |
| | Name: | | Clear | Ren: Seek | Firstname or Las | rname. Tr | e: | 4 Clear |
| | Phone: | [| Clear | Rem: Seek | Nonephone or Cel | Liphone. Date of Bir | th Year /Month | /Day Clear |
| | Email: | | | | Clear | Contact Perso | 182 | 4 Clear |
| | Company. | | | | 4 Clear | Association | is: | 4 Clear |
| | Adves | | | | | | | |
| | Augress. | | | | Clear | Note | IS ⁻ | Clear |
| | Event Date. | From / / | t To | 1-1 | Clear Clear | Note | is: | Clear |
| | Event Date: | From / / Full Name | Gender | / / Belutation | Clear Clear Clear Home Phone | Brief Note | e Address (Right-clici | Clear Clear |
| | Event Date: | From / / Full Name Austen, Jane | Gender | / / Balutation Ma | Clear Clear Home Phone | | Address (Right-clic) 1166 Village Vid | Clear Clear to toggle row height) |
| | Event Date: | From / / Full Name Austen, Jane Drunn, Lora J | Gender Venale Venale | / / Balutation May Miss | Clear Clear Clear Home Phone 605-263-0778 | Note Brief Note Cell Phone Coll-Coll | Address (Right-Cici 4166 Village Vir 2807 Elsis Drive | Clear Clear to toggle row height) + tw Drive |
| | Address. Event Date: Distormet No. Abbecopieci Abbecopieci Appraderos | From / / FullName Austen, Jane Drumn, Loza J Barrott, Janice G | Candar Gandar Penale Zemale Famale | / / Belutation Ma. Miss Ma. | Clear Clear Home Phone 605-263-0778 | Nore Ore: Phone Col-col-5991 803-826-5991 | Address (Right-Cicl 4166 Village Vir 2807 Elsis Driv 297 Clay Lick R | Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear |
| | Address. Event Date: Dustomet No. Addrecodeca Astrocodeca AFDFADSFDS | From / / Full Name Busten, Jane Drunn, Lora J Barrott, Janice G | Cander Gender Female Female | / / Balutation Ma. Ma. | Clear Clear Home Phone 605-263-0778 | Nore Orei Phone Celi Phone Coo-coo-coo Roo-coo-coo Roo-coo-coo Roo-coo-coo | Address (Right-Cici 1166 Village Vi 2807 Elsis Drive 297 Clay Lick Re | Clear Clear to toggle row height) + ex. Drive sed |
| | Event Date: Event Date: Customer No. Abbecopids Abbecopids Asbecopids | From / / Full Name Busten, Jane Drunn, Lora J Barrott, Janice G | To Gender Penale Formale | / / Balutation Ma. Miss Ma. | Clear Clear Home Phone 605-263-0778 | Note Brief Note Cell Phone 003-026-2991 803-826-5991 | Address (Right-Cicle 166 Village Vil 2807 Elsis Drive 297 Clay Lick Re | Clear Clear to toggle row height) + ex. Drive sed |
| | Event Date: Event Date: Clustomer No. Abbecopies: Abb | From / / FullName Austen, Jane Drunn, Lora J Barrett, Janice G | Gender Venale Venale Fomale | / / Selutation Ma. Ma_ Ma_ | Clear Clear Home Phone 665-263-0778 | E Note Brief Not Cell Phone Coll-Coll-Coll Cell-Phone 603-626-5991 Sold-Sold | Address (Right-Cicl 166 Village Vil 2807 Elais Drive 297 Clay Lick Re | Clear Clear to toggle row height) + ex. Drive pad |
| | Event Date: Event Date: Abbcooped: Abbc | From / / FullName Austen, Jane Drunn, Lora 3 Barrett, Janice G | Jender Vemale Zemale | / / Balutation Mr. Xiss Mi | Clear Clear Home Phone 605-263-0778 | Cell Phone Cell Phone Cell Phone Coll-ctor-ctore coll-ctore-ctore coll-ctore-ctore coll-ctore-ctore coll-ctore-ctore coll-ctore-ctore coll-ctore-ctore-ctore coll-ctore-cto | Address (Right-Cicl 166 Village Vil 2807 Elais Drive 297 Clay Lick Ri 1 | Clear Clear to toggle row height) + ex. Drive sed |
| | Address. Event Date: Addresourca Addresourca Addresourca Addresourca | From / / FullName Austen, Jane Drunn, Lora 3 Barrott, Janice G | Gendar Venale Venale | / / Salutation Ms. Miles Mile I I I I I I I I I I I I I I I I I I I | Clear Clear Home Phone 605-263-0778 | | Address (Right-Cicl 166 Village Vil 2807 Elais Drive 297 Clay Lick Re | Clear Clear to toggle row height) + w. Drifye yed |
| | Address. Event Date: Addressed Addre | From / / FullName Austen, Jane Drunn, Lora 3 Barent, Janice G | To Gender Penale Penale | / / Balutation Ms. Miles Miles Miles | Clear Clear Home Phone 605-263-0778 | Nore Original State Sta | Address (Right-Cicl 166 Village Vil 2807 Elais Drive 297 Clay Lick Re | Clear Clear to toggle row height) + w. Drifye yed |
| | Address Event Date: Clustomer No. Aborcobecs Arbitabstis | From / / Full Name Austen, Jane Drum, Lora 3 Barrott, Janice 6 | To Gendar Yenale Yenale | / / Selutation Miss Ma- - - - - - - - - - - - - - - - - - - | Clear Clear Home Phone 605-263-0778 | Note Original State Sta | Address (Right-Cicl Address (| Clear Clear to toggle row height) + we Drifye |
| | Address Event Date: Clustomer No. Asoncooloci Astorabistos | From / / FullName Austen, Jane Drunn, Lora J Barrott, Janice G | ÷ ∎ To Gender. Yenale Yenale Yenale | / / Selutation Miss Miss Mi- Communication Miss Communication Miss Communication Miss Communication Miss Communication Miss Communication Miss Communication Miss Communication Miss Communication Miss Communication Miss Communication Miss Communication Miss Communication Communicati | Clear Clear Home Phone 605-263-0778 | Note Biref Not Cell Phone 003-626-5991 803-826-5991 9 9 9 | Address (Right-Cicl Address (Right-Cicl 1166 Village Vil 2807 Elsie Drivi 297 Clay Lick Ri | Clear Clear to toggle row height) + w Drave |

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 C |
|-----------------------|--|---------|-------|-----------------|
| 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] | | | Export to Excel |
| From | Ordinary 10 VIP | DA | ð | 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

| 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 C Amount | |
| 4. Phone: C Home Phone C Cell Phone | Export to Excel |
| <u>5</u> . List Type: • Breif • Detail | iew Print Close |

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 |
| A00000003 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

| 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 0 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: | 6 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 ▲ | |
| 2. Customer Category: | Possible Range: From [Ordinary] To [VIP] | Close |
| 2. Drint Order: Du | | <u></u> |
| <u>a. Print Order: By</u> | O Customer Category (Event Count O 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 "04/24/2014" To "04/24/2015" Customer Category: From "Ordinary" To "VIP" Print Order: By "Event Count" | | | | | |
|---|-----------------------|------------|-------------|---------------|-------------|
| | | | | | |
| 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] | |
| From | 04/08/2015 → To 04/24/2015 → F | |
| 2. Customer Category: | Possible Range: From [Ordinary] To [VIP] | |
| From | 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 Customer Category: From "Ordinary" 7 | 4/24/2015" Io "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 Processing Completed | Ireland in Spring: Weeklong 3-City Trip membership any products , service or support membership-2015 |

List of Event/Amount of Selected Customer

Where to:

| Reports > List of Event/Amount of Selected Custo | mer |
|--|-----|
|--|-----|

| 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:"A000000001" [Aust Event Date: From "04/24/2014" | en, Jane] Cell Phone To "04/24/2015" | 2: 803-826-5991 | | |
|---|---|-------------------------|---|--------|
| Event Date*Full Name | *Status | *Brief Note | * | Amount |
| | 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 | ct Person | - 0 - |
|--------------------------------|---|---------------|---------------------|
| <u>1</u> . Event Date: Fron | Possible Range: From [04/24/2014] To [04/24/2015] | Preview Print | ත් <u>C</u> lose |
| 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.

| Event Da Customer | te: From "04/24/2014" Category: From "Ordin | To " ary" | 04/24/2 To "VI | 015" P" | | | | | | | | |
|----------------------|--|--------------|-------------------|------------|----|-------|---|---------|--------|---|-------|--------|
| | | == | | | | | | | | | | |
| Rank * | Contact Person | * Co | ntacter | Phone | * | Count | * | Average | Amount | * | Total | Amount |
| | | == | | | == | | | | | | | |
| 1 | Felicity Young | 42 | 5-606-1 | 234 | | 16 | | | 4,512 | | | 72,199 |
| 2 | Catherine Cookson | | | | | 3 | | | 733 | | | 2,200 |
| 3 | Alicia Keys | 91 | 7 934 3 | 319 | | 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 | ත් .ose |

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/ Customer Category: From "Ordinary" To "V | 2015" IP" | |
|--|--------------------------|-----------|
| Rank *Customer No*Full Name | *Customer Category * Cou | t* Amount |
| | | |
| 1 A000000004 Stewart, Jade | VIP | 9 38,599 |
| 2 A00000001 Austen, Jane | VIP | 5 33,400 |
| 3 A00000003 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

| | | | | and the second second second 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 | | | | |
| · Yes 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 Vies C No | AG00000001 Austen, Jane AFDFADSFDS Barrett, Janice G Possible Range: From [Ordinary] To [VIP] Ordinary VIP Custommer No. C Customer Category F Yes C No | AGD0000001 Austen, Jane AFDFADSFDS Barrett, Janice G Possible Range: From [Ordinary] To [VIP] Ordinary VIP Custommer No. C Customer Category Customer Category Category | AG00000001 Austen, Jane AFDFADSFDS Barrett, Janice G Possible Range: From [Ordinary] To [VIP] Ordinary VIP Custommer No. C Customer Category 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 [AFDFADS | FDS] |
| | From A000000001 🛃 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

| 6 | | | | | | | | Pota Customer Relationship Mar |
|-------------|----------|--------|-------------|--------|------|-----------|----|--------------------------------|
| Maintenance | Reports | Labels | Email / SMS | Tools | Exit | Help | | |
| | | Prin | t Address | Labels | of | Customers | by | Selected Customer Category |
| | S | Prin | t Address | Labels | of | Customers | by | Selected Association |
| | | Prin | t Address | Labels | of | Customers | by | Customized Conditions |
| | | Prin | t Address | Labels | of | Customers | by | Choosed Customer No |
| | | Prin | t Address | Labels | of | Customers | bу | Event filter |
| | | | | | _ | | _ | |

| 3 | Print Address La | abels of Customer b | by Choosed Cus | stomer No | |
|---------------------|------------------|--|----------------|-------------------------|------------------|
| <u>1</u> . Choose : | | AFDFADSFDS AFDFADSFDS AFDFADSFDS AFDFADSFDS AFDFADSFDS AFDFADSFDS AFDFADSFDS AFDFADSFDS AFDFADSFD | | | |
| 2. Print Company: | (Yes | C No |] | Da Pre <u>v</u> iew Pri | nt <u>C</u> lose |

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

| 3 | Print Address Labels 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 |
| <u>2</u> . Amount: | From 0 To 99999999 |
| <u>3</u> . Print Order: By | © Full Name C Amount |
| 4. Print Company | Image: West Constraint Image: West Constraint Image: West Constraint Image: West 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

| £. | | | Email | | 0.5 | -3 |
|--------------|--|-------------------|------------------------------|-------------------------|----------------|-----|
| Send Emai | il to Customer of Choosed Customer(s) | f Choose Da | cs(open window) | | Today: 04/16/2 | 015 |
| Numb | er of Chosen for Emailing | 4 Beady for | r sending Email to Choosed C | Customer | Glose | |
| Customer No. | Tull Hans | Costimer Category | Trail | Title | Gender Danati | 1 |
| a000000001 | Barrett, Janice ö | VIP | Jasice@example.com | Adviser | Female T | |
| A000000002 | Asano, Xana A | Ordinary | HanaAsanoSexample.com | Director | Male T | - 1 |
| A000000003 | Drumm, Lora J | VIP | LoralrumsResample.com | Manager | Female Y | |
| A00000004 | Stewart, Jade | VIP | Jade@example.com | Chairman | Hale T | |
| - | | | | | | - |
| | | | | | | |
| | | | | | | - |
| | | | | | | - |
| | | | | | | |
| | | | | | | |
| | | | | | | - |
| | | | | | | - |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | - |
| | | | | | | - |
| | | | | | | |
| | | | | | | |
| | | | | | | 14 |
| A A | Pine PgCg 1001 | af 004 Choose | All Onchoose All Cho | cose All the same Custo | omer Category | 1 |
| Checked : | for Sending Notificati | an Chor | ee Dacboose Unct | loose 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

| 1 | | | Send SMS(bu | lk sms) | | | -Le | |
|--------------------------|------------------------|------------|---------------|---------------|--------------------------|-----------------|-------------|-----------|
| Send SMS Number of Ch | to Customer | 0 Chu | oose Data(ope | n window) | | | Today: 04 | /16/2015 |
| Number of Ch | osen for Emailing: | 2 1 | jeady for ser | ding SMS to C | hoosed Customer | 1 | glose | |
| Customer No | Full Name | Customes C | stegory | Cell Phone | Cell Bhone(2) | Title | Gender | Sent(T) - |
| 1000000001 | Barrett, Janice G | VIP | 603- | 826-5991 | e services contractions. | Adviser | Female | Y |
| ADDDDDDDD2 | Aseno, Hane A | Ordinary | | | | Director | Male | |
| A000000003 | Drumm, Lore J | VIP | 1000 | | | Manager | Fenale | |
| A000000004 | Stewart, Jade | VIP | 618- | 219-5569 | | Chairman | Halm | ¥ |
| | | | | | | | | |
| | | | | | | | | |
| A A | Polis Pobn Do | L 80 804 | Choose 211 | UDCDOOSE A1 | Chouse Al | 1 the same Cust | omer Catego | τy |
| Checked : | for Sending Notificat: | lon | Choose | Inchoose | Unchoose A | 11 the same Cus | comer Categ | ory |

11. Mass Import/Export

Import Customer Records from Excel

Where to:

Menu >Tools > Import Customer Records from Excel

| | _ | | | | | san Deside | The supplication of | a at | Taxan I and | Partel Pills and | _ | _ | - | - |
|--|---|---|---|--|---|---|--|--|--|--|--|---|--|---|
| 1.1 | | | | D | | The second second | C. | 17 | AMERICAND | CACHE PALA AND | | | | 1.1 |
| 1 | Customer Ho | Solutation | First He | me M | Lout No. | me Genderli | turne Phon | e lfat | Cell Phone | Imat | Customer Categor | v Add | L. | Hotes |
| 2 | A000000001 | ML | Janice | 0 | Barrett | Fernie | | | 803-826-5991 | Janice@eicanple.com | VP | 4166 Villege Frederick, M | e View Drive VID 21701 | |
| 3 | A00000002 | 5W | Kana | (A) | Azaras | Male 3 | 04-513-7615 | 1 | \$1D-219-5583 | Ranageoanple.com | Ordinary | 669 Mount 1 New York, 1 | Tabor NY 10013 | |
| | Compa | ibilitie | a of Es | wal Ve | distant. | the second se | | | | | | | | |
| | the second se | the second se | | | | | A REAL PROPERTY AND A REAL | | | | and the second sec | MACCORD LINE | | |
| un: | database, Import musue | starded, tomar nu is will t s member tussa.co | end all ster of ce disc records | sche da sched in info da | and will tabase | ng second) 11 not ent might chang | into curt e lots of da | ty emi trent to of s 60408 | database. Nystem datal | non Suggest to be | ickup the whole da | tabase befo | re dang it | |
| 8. 2001 | database, If the Cus database, Import musae og File. | nterded, tomar nu it will ! t member Hatta\Q | and will ster of the disc seconds Fynceres | the in the in arded i into do | and will and will tabase | ng nerord) 11 not edd mght chang vccatoers_i | into curt e lots of da ENCEL_201 | ty emi ty emit to of s so-emit | detabare. System datal atta | noe. Suggest to be Choose the | ickup the whole dat Excel File for im | tabase befor porting | re dang t Load Exc | cel Dat |
| e. zeet urs: ocita | will be di If the Cas database, import masses og File: C.V us Custor | nnardad, tomar nu re will 1 e mender Naslav, (M | and will eber of the disc records Fylicker | the b the b arded into du the bb | and will and will tabase c_cava | Last Name | sat altera sato curr e lots of da taces_aos | ty and trant to of s Streng Home I | letiett En distabasee system datat asta Phone F | Choose The | ickup the whole da Excet File for im Email | tabase befor porting | te daitg t Load Exc | cel Dal |
| erite State | A00000 | nearded, towar nu re will f e member nerne fir nerne fir 0005 M | and will sher of se disc records Fylking Sublic A | Abe in Abe in Arded in Into do Trup-bio Families F | end with tablese c_care inter [1] inst 5[G | Last Name Barrel Last | Sato cust e lots of da mont_sos | ty ent trent ta of s states | eset in detabase system datat attai | Choose Die Choose Die Call Phone 803-826-593 | Ekop the whole da Excet File for im Ental | tabase befor porting | to doing it Load Exc Category | Address Address Frederick |
| en e | elli le di If the Car database, Import nussa ng File Crite A00000 A00000 | rearded, towar nur re will 1 a member Instan of nur 112 0005 M | and sta etex of te diato records Francisk Substan | 11 mon Kibe (2) socied (into du This Do This Do Final No Janice F Kana | end will tabase c_CEVE mrr_H inste G | Last Name Banet Last P | Sinto cuin e lots of da excel_200 Gender la Fernais Nale | ty ent trant to of s scene Home 914-51 | detabase . oytom data IIII Phone F 3-761 | Choose Die Choose Die Call Phone 603-626-597 | Ekup the whole dat Esc of File for inn Email Janice@example (KanaAsano@example) | tabase befor porting Customer (VIP Codecary | to doing it Load Exc Catroory | Address Address Toda Mass Toda Mass Taga Mass Taga Mass |
| e. urk: orite | elli be di If the Car datatase, import musar ag File Car A00000 A00000 | enarded, tomar nur re will 1 n member nur fiz 5 0005 M 0005 M 0006 M | and ui eter of ter disco records FT-DESE tables t SS 1 | LL more to socied in into do Trans bo Final No Janice F Cana Lana | end will tabase o_cavia inst F G A J | Last Name Banet Last Asano Drumm | Inte curt o lots of da ERCEL_202 Condon la Female Nale 1 Female | ty ent trans ta of s 50406 914-51 605-28 | detabase , gotom datal IIII Phone F 3-7611 3-0771 | Choose Over | Ekop the whole dat Excel File for im Entpil Janice@example / Kana/sano@exar LoraDrumm@era | Customer C Customer C VIP Contenary VIP | re doing it Load Exc Category | crel Dat Addres Frederick Did Mice lew Yer 2007 Electrony |
| terreter terreter terreter | elli be di If the energy moot musar ng File C. A00000 A00000 A00000 A00000 | nearded, toest nu re will 1 a member merile So 0005 Mi 0005 Mi 0005 Mi | and ui obs: of the distriction methods for the off the distriction for the distribution for the distriction for the distribution for the distributio | La more sobre do accident a into do Trans Do Trans Do Danice F Kama Latra Isane | end 433 tabase c_carre inst F.G | Lant Nate Banet Last Asans Drumm Osumet | sata alteen Sata cuat e lots of da cactal_dos Dender Sa Female Nate Female Mate | ly end to entre the of s to entre Horne 1 914-51 505-28 | detabase detabase ystem datat 25.8 Phone F 3-761 (3-761) | save Suggest to by Choose the so Cell Phone so Cell Phone so Cell Phone so Cell Phone | Excep the whole dat Excel File for im Empl Jarrice@example (Kana4sano@example LoraDrumm@example.com | tabase befor porting Customer C VIP Ordenary VIP | re duing it Load Exc Catroory | Address Address Install Was Install Was In |
| terita Stati | elli i be elli if obe enere, import nussae ng File: elli A00000 a00000 anenen elling Custome | nearded, town nu re will f member nurritz S 0005 M 0006 M 0006 M 0006 M 0006 M 0006 M | and utilities of the discords records FT Discords t t t t t t t t t t t t t | La nore solve da societa da into da trans bio famice F Cana Latra Isane storner i | e_cove instance c_cove instanc | List Name Banet Last Asami Drumm Stanet Mice-unique | sinto outro otos of du ciccet_200 Dendo ta Fernano Nale Fernano Asua Destomer e | ty end topene da of s Goene Home 1 914-51 914-51 914-51 914-51 | Lettert Lin distablisher hypotem datat TELE Phone F 3-7611 3-7611 3-7611 (unit not add | sace Suggest to be Choose the as CHI Phone 803-826-591 A150-2900-A60 orfo database | Exception which dates a second | tabase befor porting Costemer (VIP Drdmay VIP VIP VIP | Load Exc Load Exc Catrony 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 | cell Dat Adves tree Vite frederick top Mean teamer, 1 297 City t / Exit |

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 Records to Excel | | 010 | |
|-----------------------|--------------------------------------|---------------|-------|--|
| Target Folder: C:\D | sers\Desktop\DOC_CR7E | | | |
| Target Filename: Cust | Comms_Excm1_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. | | | |
| <u>ں</u> | This product is licensed to: | | | |
| S S | Pota Technologies Ltd. | | | |
| ftwa | Trial version will expire on: {10/07/2015} | | | |
| 2 | Pota Website: http://en.potasoft.com | | | |
| | Contactus: <u>support@potasoft.com</u> | | | |
| Warning: T and interna or distribut result in se be prosect | his program is protected by copyright law ational treaties. Unauthorized reporduction ion of this program, or any portion of it, may were civil and criminal penalties, and will ted 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