



Pentad Systems CRMS

Logging In

1. Open up Internet Explorer. In the address bar, type in the address to your Pentad Systems Module and hit the Enter key.
2. Type in your Username and Password and click .



Login

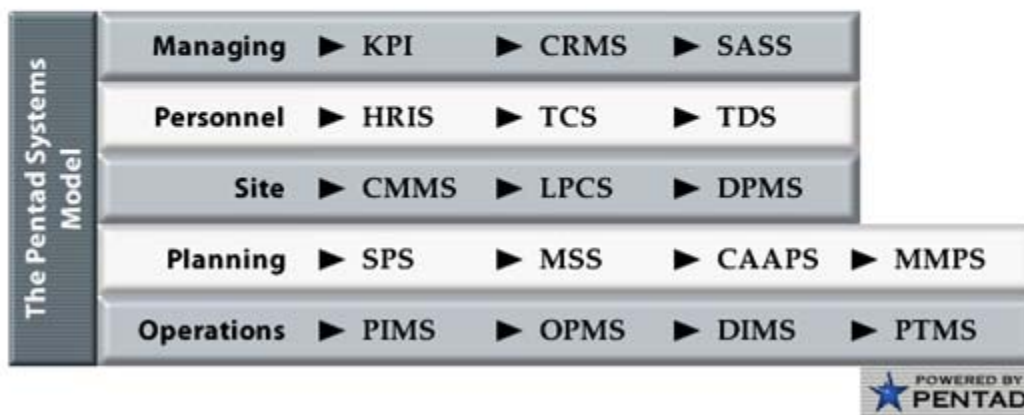
USER:

PASSWORD:

3. This will bring you to the Systems Menu:



Systems Menu





Pentad Systems CRMS Module Using the CRMS

1. Next to **Managing**, click on **▶ CRMS**:



Customer Relationship Management System Main Menu



Pentad Support, you are logged in.

LOGOUT



Pentad Systems CRMS Module

Using the CRMS
Customer Management
Add a New Customer

1. At the Customer Management Menu, click

▶ Add a New Customer



Customer Management Module Main Menu

▶ Display a Customer

▶ Add a New Customer

▶ Edit a Customer

Pentad Support, you are logged in.

LOGOUT

2. Choose whether you are entering and Individual or a Company:



-- Choose --
-- Choose --
Individual
Company



3. For this example, we are entering a new Company:

ACTIVE? ADD CUSTOMER

ORGANIZATION NAME

NOTES

4. Type in the desired information, and click ADD CUSTOMER :

ACTIVE? UPDATE CUSTOMER DELETE CUSTOMER

ORGANIZATION NAME: Pentad Systems

NOTES:

AFFILIATED INDIVIDUALS: No individuals currently affiliated.

ADDRESSES: There are no addresses to display.

CONTACT INFORMATION: There is no contact information to display.

-- Add New --

5. To add new contact information, click on the drop-down box labeled Add New.

6. If you choose to add a new Individual, you will be taken to the Select Customer Screen. Here, you can link an Individual that you have entered into the system to the Company you have chosen, or create a new Individual to link to the Company you have chosen:



7. Type in the Individual's name or choose it from the list to link them to the Company.
8. If you choose to add a new Address, a series of text boxes will populate for you to enter in the new Address information:

9. Type in a Location (Ex: Main) and the address. You do not need to enter in a City or State, as putting in a Zip Code will automatically populate a City and State. If you are unsure of the Zip Code, click **LOOK UP ZIP CODE**. When you are finished with the address details, click **ADD ADDRESS** to add the address or click **CANCEL** to cancel.
10. If you choose to enter a new Phone, a series of text boxes will populate to enter in a phone number:



Phone

DESCRIPTION

NUMBER / ADDRESS

ADD PHONE CANCEL

11. Type in a description of the phone number (Ex: Main) and type in the phone number. When you are finished, click **ADD PHONE** to add the phone number or **CANCEL** to cancel.
12. If you choose to enter a Fax number, a series of text boxes will populate to enter in a fax number:

Fax

DESCRIPTION

NUMBER / ADDRESS

ADD FAX CANCEL

13. Type in a description of the fax number (Ex: Main) and type in the fax number. When you are finished, click **ADD FAX** to add the fax number or **CANCEL** to cancel.
14. If you choose to enter an E-Mail address, a series of text boxes will populate to enter in an E-Mail:

E-Mail

DESCRIPTION

NUMBER / ADDRESS

ADD E-MAIL CANCEL

15. Type in a description of the E-mail address (Ex: Main) and type in the E-mail. When you are finished, click **ADD E-MAIL** to add the E-mail or **CANCEL** to cancel.



16. If you choose to enter in a Web-Site, a series of text boxes will populate to enter the Web-Site:

The screenshot shows a form with a dropdown menu at the top labeled 'Web Site'. Below it are two text input fields. The first field is labeled 'DESCRIPTION' and the second is labeled 'NUMBER / ADDRESS'. At the bottom of the form are two buttons: a green 'ADD WEB SITE' button and an orange 'CANCEL' button.

Type in a description of the Web-Site and type in the Web-Site address. When you are finished, click **ADD WEB SITE** to add the Web-Site or **CANCEL** to cancel.