



## 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

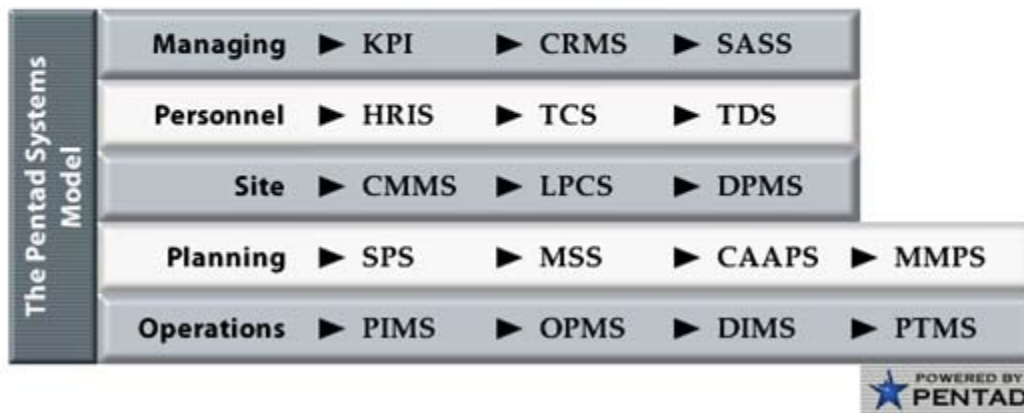
USER:

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  
Display A Customer

▶ **Customer Management**

1. Click on the button labeled :



### Customer Management Module Main Menu

▶ **Display a Customer**

▶ **Add a New Customer**

▶ **Edit a Customer**

*Pentad Support, you are logged in.*

LOGOUT

▶ **Display a Customer**

2. At the Customer Management Menu, click :

**Select a Customer to Display**

**CUSTOMER NAME SEARCH**

Type partial name, ENTER

Company

SHOW INACTIVE CUSTOMERS?

**ADD NEW CUSTOMER**

**CUSTOMERS**



3. Type in the customer name, and select whether it is an Individual or a Company from the dropdown list. If you wish to display inactive customers, select the checkbox  **SHOW INACTIVE CUSTOMERS?** . After you've applied the desired filters, hit the Enter key:

**PENTAD** **CRMS** CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

▶ CRMS Main Menu ▶ CMM Main Menu ▶ CMM Admin Menu

### Select a Customer to Display

CUSTOMER NAME SEARCH

Pentad

Company

SHOW INACTIVE CUSTOMERS?

**ADD NEW CUSTOMER**

CUSTOMERS

- Pentad
- Pentad Systems
- Pentad Systems

4. Select a Customer from the list to display:

**PENTAD** **CRMS** CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

▶ CRMS Main Menu ▶ CMM Main Menu ▶ CMM Admin Menu

**EDIT CUSTOMER INFO** **BACK**

ACTIVE

ORGANIZATION NAME	ADDRESSES
Pentad Systems	1001 N Havana SPOKANE, WA 99202
NOTES	CONTACT INFORMATION
	There is no contact information to display.
AFFILIATED INDIVIDUALS	ACTIVE
, Randy	