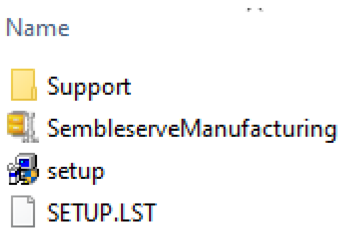
Semblesoft

Congratulations on your choice of CRM software. This CRM system software application was designed specifically with ease of use and robust simplicity in mind. We have purposely designed it in such a way as to eliminate off-putting complexity. Honest, really powerful and simple to use, in this way offering great value for money attributes.

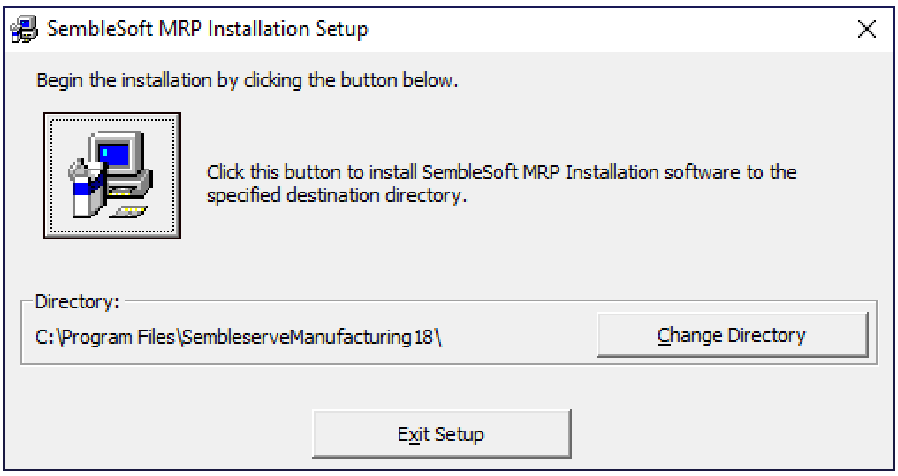
Your system will be available 24/7, no down time as it is a stand-alone desktop application, not cloud based. It also has a backup feature that when activated, will back up all your important files contained within the 'Semblesoft CRM' folder and labelled with the date and time they were backed up. It is highly recommended to periodically further 'copy backup' these files externally onto a memory stick as an extra precaution.

Installing the SembleSoft CRM System onto your Computer

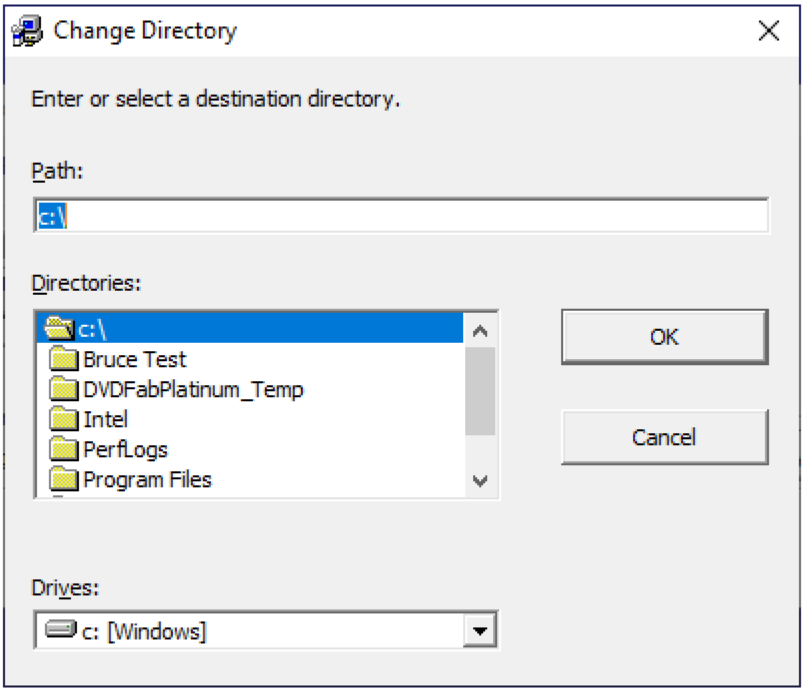
1) Simply follow the screens below in this sequence as shown below. Once you double click the Set-up icon shown below second from bottom, you will then see this form shown on next page.



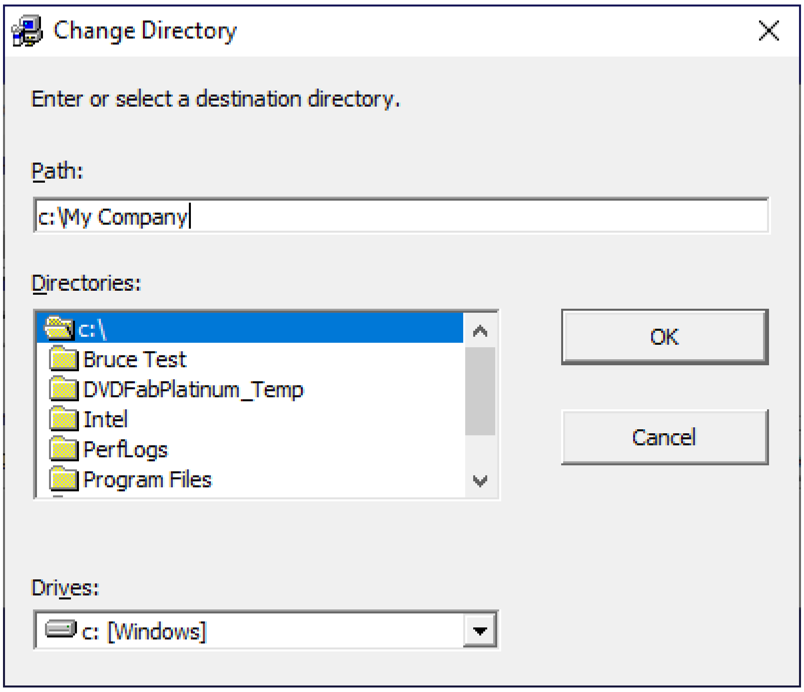
2) Click the ‘Change Directory’ icon to right, DO NOT install under ‘Program Files’…



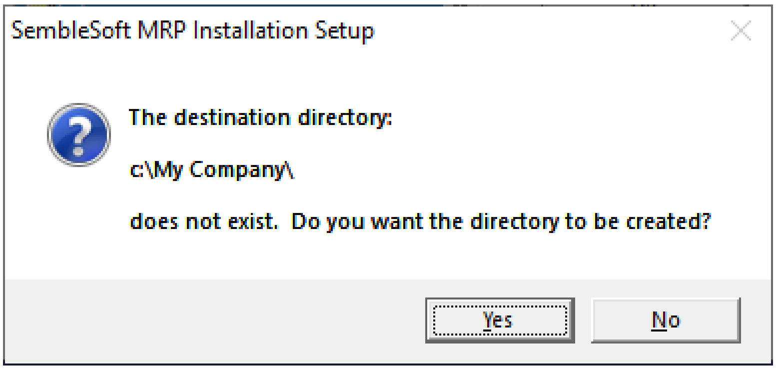
3) Type in your name to the right of the C:\ prompt shown next…



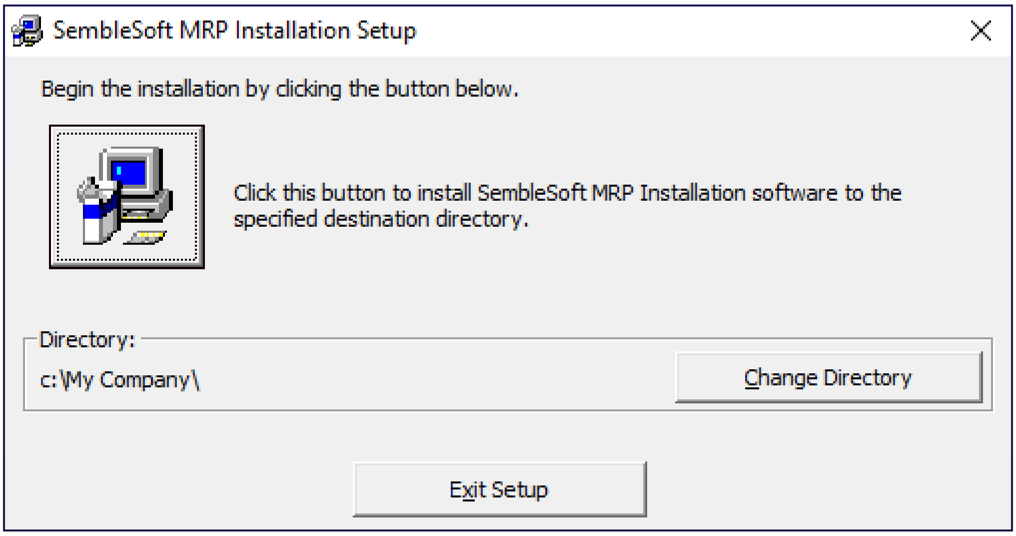
4) In this case 'My Company' was used as Company name, type your own name instead to the right of C:\ prompt and click OK…



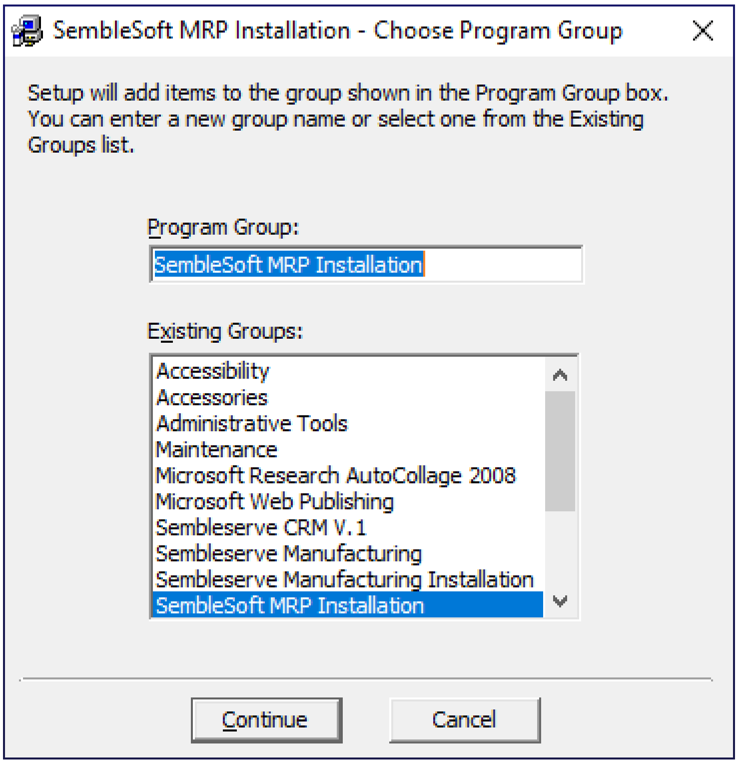
5) You will then see this message-box below, click Yes…

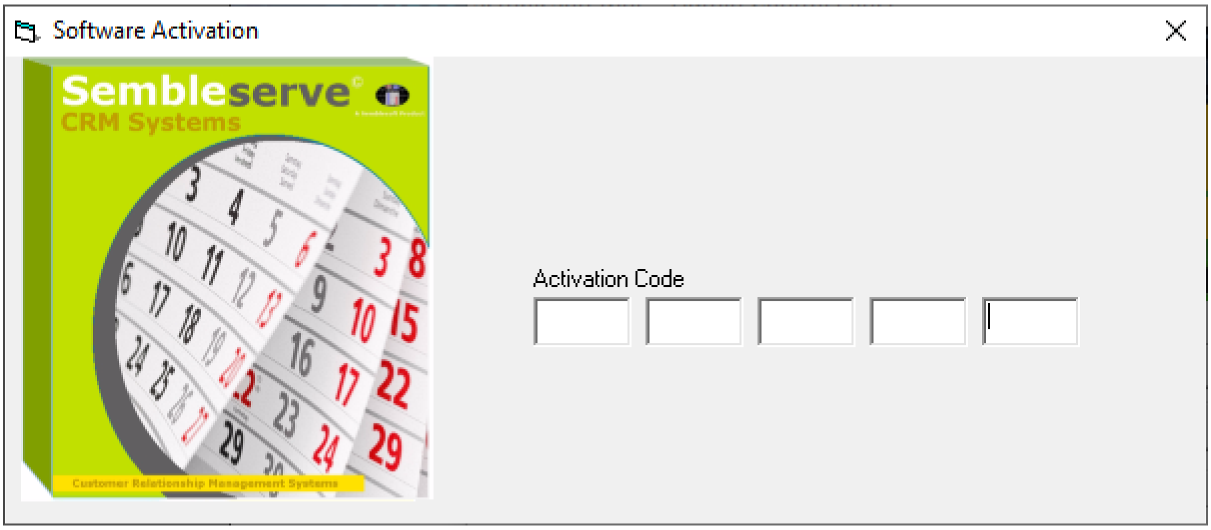


6) In this form ‘My Company’ (your name) is now shown in the path C:\My Company\, now click the image button top left in form below to install Semblesoft CRM…



7) Click continue to install, then launch the application once installed…





Activation Of This Application

You will be prompted to input your activation code, the system will give you a six character code to send to us at **www.semblesoft.com** and we will return your free thirty day trial twenty five character activation code.

Setting Up the Application

Once app is installed and open, first thing to do is click on the 'My Company Details' option button top right in 'Control Panel' form below to open 'My Company Details' and complete the form fields, entering your company details in the fields shown next page.

The system automatically prompts you to create a full backup of your system files when you close and exit the application, created in the same folder as the application resides in. Each created backup folder is named with the date and time it was saved, so it will keep an entire history of your system files for you for easy access should you delete or alter any system files accidentally. If they get too numerous after a period of time, simply delete all except say the latest ten backup folders, to remove 'clutter'. It is still a good idea to periodically copy these to a memory stick as well for added extra security of data preservation, as recommended.

How to Set-up 'My Company Details'

Complete all the fields and click the 'Add/Amend My Company Details' button at the bottom of form and all your inputted details will be saved to the database. You can return at any time to update any fields by simply selecting the 'My Company Details' option button, amend any fields, and then click 'Add/Amend My Company Details' button to update. Click the ‘Restore Backup Files’ to bottom right on the below form to restore your data if you ever need to.

Activate ‘Create Demo Files’

Click the ‘Create Demo Files’ check box at top right in above image, this will automatically populate your Customer Database will also automatically be populated with three fictitious customers with full details you can then use in practice as well. These practice files are automatically deleted when you close the application down, so repeat as above to re-activate them when you next open the application, or simply just type in your own and save.


My Details
My Details
CRM
My Details Setup
My Name
Concept Catering
My Telephone Number
01234567890
My Email Address
info@conceptcatering.com
My Website Address
www.conceptcatering.com
My Address
123
Catering Way
Pineapple Place
Feast City
BQ11BQ
My Bank Details
Barclays plc
Sort Code - 11-22-33
Account Number - 12345678
INO - Concept Catering
Restore Backup Files
Semblesoft
Add/Amend My Details
Cancel

Deleting Customer Records

Simply select the customer record you wish to delete under 'CRM Customer Details' and click the 'Delete Record' option button just above your selection

Filtering Customer Records Notes

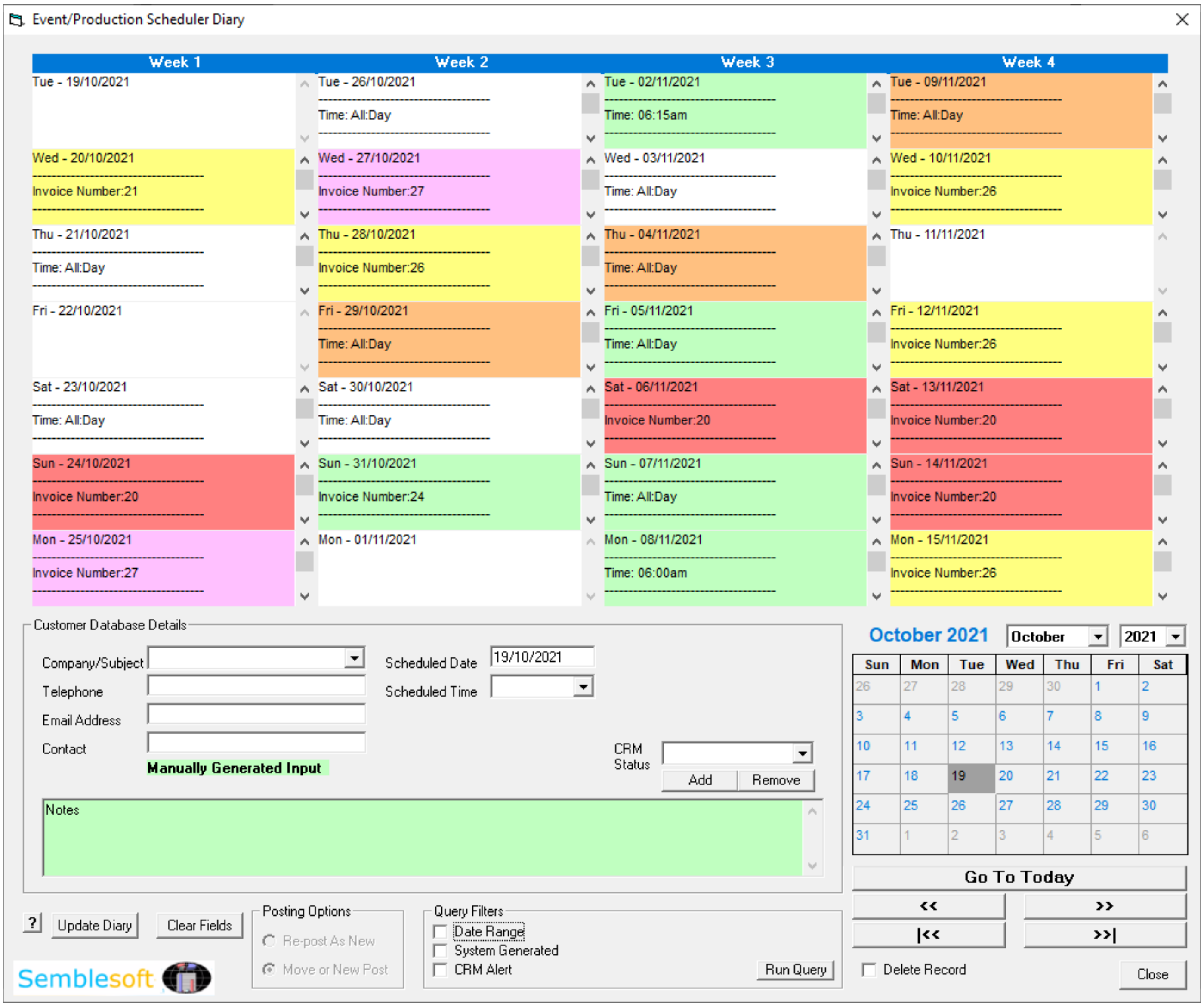
Simply select the 'Notes Filter' bottom right in below image and only the customer records containing notes will be available in the dropdown listing in the first field.

Filtering Diary Records

Simply select one or more of the check boxes you wish to filter on at the bottom of the diary form in below image, click the 'Run Query' button and only the customer records containing the selected options will be available in the dropdown listing in the first field.

You can also select a date range you wish to filter on, as another further filter criteria should you so wish. This functionality is particularly useful for pulling out to your dropdown listing only, for example, CRM criteria in a given date span that may need your urgent attention, or simply to inform you of how many of a certain CRM criteria there are, etc.

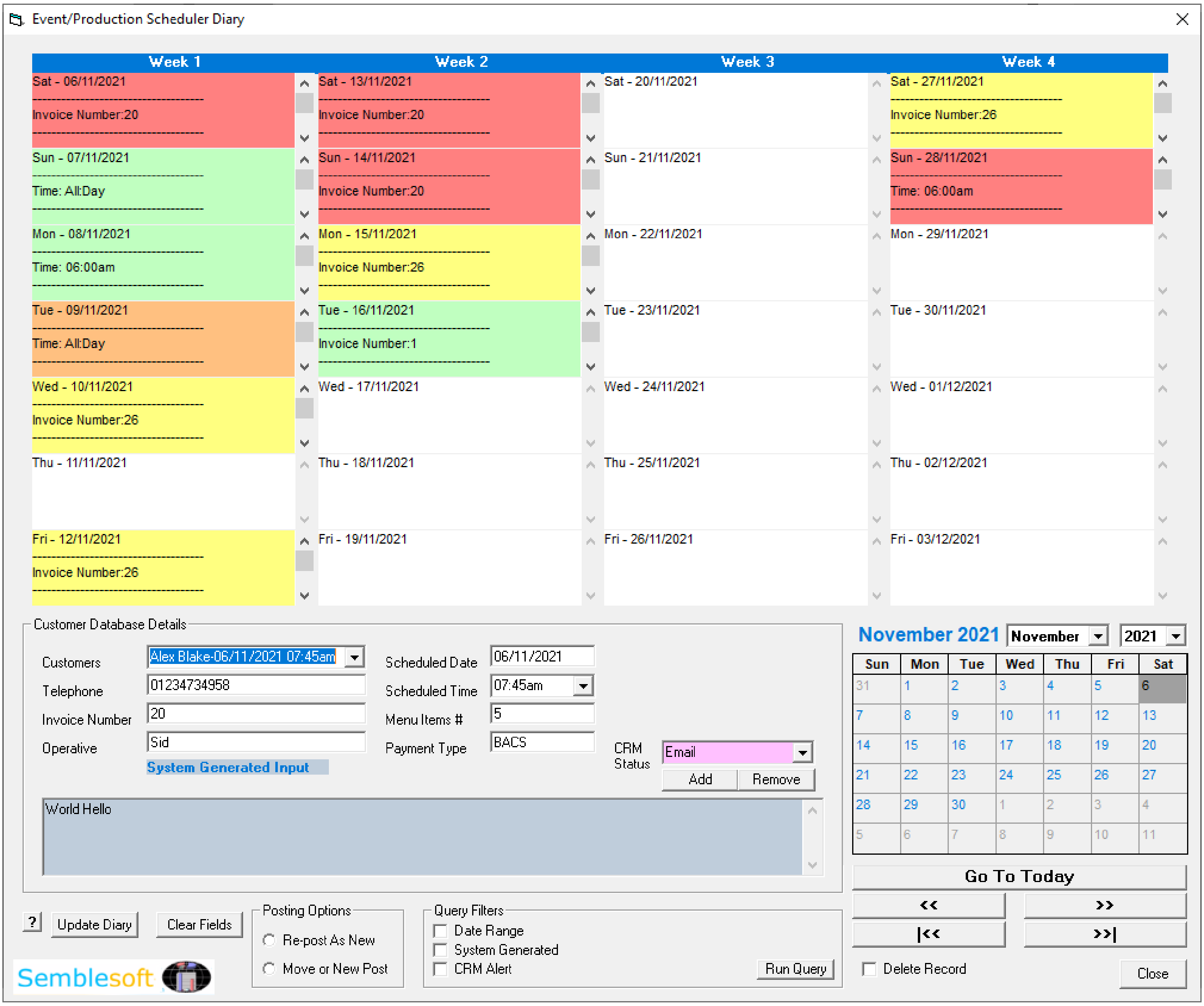
So, in essence, you can select all the options and a date range to pull out to your dropdown listing only those diary entries that contain all those criteria common to them all, perhaps for today's date only, or a date range chosen by you? Simple, but effective querying made easy.



Simply click on each diary entry to see it enlarged in a new frame, as shown below, click the enlarged frame to hide it again. Select from the Company/Subject dropdown any diary entry you wish to edit or re-schedule on a different day simply by changing the 'Schedule Date' by selecting a new date to right on the calendar, select from 'Posting Options' the 'Move or New post' option, then click 'Update Diary' and it will be reposted in the diary under the new date selected.

To add a new diary entry manually, simply change the 'Schedule Date' by selecting a new date to right on the calendar select from 'Posting Options' the 'Re-post as New' option, then click 'Update Diary' and it will be added and will be searchable in the

Customer dropdown list, as shown above and below. CRM status alerts you assign determine the diary entry colour.



To create your custom CRM alerts, simply key in the alert and click the ‘Add’ button to add the new CRM alert to the database, similarly click ‘Remove’ to delete one. Fifteen colours are allocated for the first fifteen CRM alerts created in the listing. Any more than fifteen CRM alerts will then be allocated a plain white background colour.

System Files Folder

The ‘System Files’ folder and all text files should NOT be accessed or fiddled with, as these text files are the crucial data files for the operation of this software system only.

- WindowsIns
- CRMStatus
- Customer Database
- Customer Diary Database
- My Company Details