



**SMART FOLLOW UP : CUSTOMER  
RELATIONSHIP MANAGEMENT (CRM)  
SOFTWARE**

## **Demo Guide**

# Introduction

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**Smart FollowUp**, the most effective and easy to use **Customer Relationship Management (CRM)** Software. CRM is actually recording and making available all information pertaining to your customers. In every business continuous interactions takes place between the customers and clients. For example, a letter is received and it is replied. A quotation is sent and the Order is received. The material is supplied and an acknowledgment received. An Invoice is submitted and payments are received.

This information shall be stored in such a way that it is easily accessible to all concerned people such as office assistants, sales executives, managers, all the way up to the CEO. CRM centers around a knowledge base that captures all customer information.

**Smart FollowUp** is innovative software, which not only keeps the track of all these transactions, but also prepares all the documents for them. As a step towards the paperless office, these documents need not be printed but directly stored, for easy retrieval

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# 1. Installation

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## Starting Installation

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Run **SmartFollowUpDemoSetup.exe** program to start Installation and follow instructions displayed.

By default software is installed in “**Ensoft Demo**” subfolder in “**Program Files**” folder of your **C** drive. Although you can change the name of this folder, you are advised not to do so. The program files are copied in the **SmartFollowUp** subfolder.

*Installation Program* will create a “**Ensoft SmartFollowUp Demo**” menu in “**Programs**” menu of “**Start**” button. **SmartFollowUp Demo** icon will also be created on Desktop.

Click on this Icon and Run **SmartFollowUp** main program.

Program will Register Ensoft Active-X Controls automatically while running on Windows XP. However following settings are required for Windows 7 or Vista O.S. to register Active-X and run SmartFollowUp Demo.

### Settings Required For Windows 7

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From **START** button. Go to **Control Panel** >  
**User Accounts and Family Safety** > **User Accounts** >

Click on **Change User Account Control settings** >

To turn off User Account Control,  
Move the Slider to **Never notify position** > Click **OK**  
Type administrator password, if prompted.

You will need to restart your computer. This setting will allow program to register ActiveX Controls and Run Properly.

### Settings Required For VISTA O.S.

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#### ALTERNATIVE 1:

From **START** button Go to **Setting** > **Control Panel** >  
**Select Security Centre** > **Other Setting** option  
User account control to be turned OFF.

#### ALTERNATIVE 2:

From **START** button Go to **Setting** > **Control Panel** >  
**User account** > Turn user account control **off** >  
**Uncheck** checkbox for “use account control to protect computer”  
Shut Down & Restart Computer. Start Running SmartFollowUp.

## 2. Getting Started

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Click on **SmartFollowUp Demo** icon on Desktop. It will display list of folders. Click on **Presentation** folder to view presentation short-cuts.

Click on "**SmartFollowUp Sample Run**" Short-Cut of PPT file, which will show you a step-by-step procedure for doing SmartFollowUp.

Click on **SmartFollowUp** main program from **SmartFollowUp Demo** icon on Desktop to run **SmartFollowUp** Demo Version.

Since these are **Demo Versions**, output values of all programs will not change, irrespective of the changes made by user in the data.