



- Pioneering CRM Innovation -

## **CRM for Sales & Marketing Product Demo & Screenshots**



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## Table of Content

1	CRM: Master Data .....	3
1.1	User & Role Management .....	3
1.2	Account & Branch Management.....	4
1.3	Contact Management.....	5
1.4	Product Catalog Management.....	6
2	CRM: Sales & Marketing .....	7
2.1	Lead Management .....	7
2.2	Campaign Management.....	8
2.3	Opportunity Management.....	10
2.4	Quote Management .....	11
3	CRM: Collaborations .....	12
3.1	Scheduling a Meeting.....	12
3.2	Planning a Call.....	12
3.3	Creating a Task.....	13
3.4	Associating a Note / Attachment .....	13
3.5	Email Management .....	14
4	CRM: Administration .....	15
4.1	Audit Trail.....	16
4.2	Communication Management (Email & SMS Template).....	16
4.3	Holidays Setting & Work Schedule.....	17
4.4	Workflow Management.....	18
4.5	Studio Tools – Pick list & Running Number .....	19
5	CRM: Reporting (Sample Reports).....	20

# 1 CRM: Master Data

## 1.1 User & Role Management

The screenshot shows the 'User Maintenance' page for user 'Brandon Chang'. The page includes a navigation menu with 'Home', 'General', 'Support', 'Collaboration', 'Report', 'Admin', and 'Help'. The user profile section contains the following details:

- User Profile:** User Name: ftsb/bcchang, Salutation: Mr, First Name: Brandon, Last Name: Chang, Change Password:
- Permissions:** Allow Login: True, Active: Active, Role: TEST2, Email: bcchang@netstermsc.com, Website:
- Business Information:** Job Title: Senior Consultant, Department: , Organization: Sales & Marketing, Business Channel Development: Business Channel Development, Reporting To: , Employment Since: 01/01/2008, Employment Tenure: 3 Year(s) 6 Month(s)
- Correspondence Address:** Home and Business address fields for Address 1, Address 2, Address 3, City, Postcode, and State.

The screenshot shows the 'Role Maintenance' page for the 'Administrator' role. The page includes a navigation menu with 'Home', 'General', 'Support', 'Collaboration', 'Report', 'Admin', and 'Help'. The role information section shows:

- Role Info:** Role Name: Administrator
- Role Management:** A table listing permissions for various system components.

Component	Access	Delete	Edit	List	View
<a href="#">Account</a>	Enable	All	All	All	All
<a href="#">Branch</a>	Enable	All	All	All	All
<a href="#">Call</a>	Enable	All	All	All	All
<a href="#">Case</a>	Enable	All	All	All	All
<a href="#">Contact</a>	Enable	All	All	All	All
<a href="#">Contract</a>	Enable	All	All	All	All
<a href="#">Inbound Email</a>	Enable	All	N/A	All	All
<a href="#">Issue</a>	Enable	All	All	All	All
<a href="#">Knowledge Base</a>	Enable	All	All	All	All
<a href="#">Meeting</a>	Enable	All	All	All	All
<a href="#">Note</a>	Enable	All	All	All	All
<a href="#">Product</a>	Enable	All	All	All	All
<a href="#">Product Catalog</a>	Enable	All	All	All	All
<a href="#">Report</a>	Enable	All	All	All	All
<a href="#">Task</a>	Enable	All	All	All	All
<a href="#">User</a>	Enable	All	All	All	All
Role	Enable	N/A	N/A	N/A	N/A
Administrator	Enable	N/A	N/A	N/A	N/A

## 1.2 Account & Branch Management

The screenshot displays the 'Account Management' page for 'Netster MSC Sdn Bhd'. The page includes a navigation menu with options like Home, General, Support, Collaboration, Report, Admin, and Help. The main content area is divided into two sections: 'Account Details' and 'Correspondence Address'.

**Account Details:**

Company	Netster MSC Sdn Bhd	Reg Number	87222-M
Alternative Name	网特科技有限公司	Email	admin@netstermsc.com
Industry	Technology	Website	<a href="http://www.netstermsc.com">http://www.netstermsc.com</a>
Type	Customer		
Description	Netster MSC (NC) is a your strategic partner in web businesses. We are based in Malaysia, also with presence in Singapore, Indonesia, Cambodia, Taiwan and Australia. NC is Microsoft Gold Certified Partner and MSC Status Company - recognition of technology excellence in the development of ISV business solutions. Our philosophy is to deliver quality results through strategic partnership and technology innovation. We take care of client's Internet business need, so that you can focus on growing your core business!		

**Correspondence Address:**

Billing Address		Shipping Address	
Address 1	246-248, Block A, Kelana Centre Point,	Address 1	246-248, Block A, Kelana Centre Point,
Address 2	3, Jalan SS7/19, Kelana Jaya	Address 2	3, Jalan SS7/19, Kelana Jaya
Address 3		Address 3	
City	Petaling Jaya	City	Petaling Jaya
Postcode	47301	Postcode	47301
State	Selangor	State	Selangor
Country	Malaysia	Country	Malaysia
Home Phone	+603-78054186	Business Phone	+603-78054186
Fax	+603-78054184	Fax	+603-78054184

**Branches:**

Branch	State	Country	Phone	Fax	Website	Rem
<a href="#">Netster Head Office</a>	Selangor	Malaysia	+603-78054185	+603-78054184	<a href="http://www.netstermsc.com">http://www.netstermsc.com</a>	Ret
<a href="#">Netster R&amp;D Centre</a>	Selangor	Malaysia	+603-78054186	+603-78054184	<a href="http://www.netstermsc.com">http://www.netstermsc.com</a>	Ret
<a href="#">Netster Support Centre</a>	Kuala Lumpur	Malaysia	+603-78054185	+603-78054184	<a href="http://www.netstermsc.com">http://www.netstermsc.com</a>	Ret

The screenshot displays the 'Branch Management' page for 'Netster Head Office'. The page includes a navigation menu with options like Home, General, Support, Collaboration, Report, Admin, and Help. The main content area is divided into two sections: 'Branch Details' and 'Account'.

**Branch Details:**

Branch	Netster Head Office	Email	admin@netstermsc.com
Account	Netster MSC Sdn Bhd	Website	<a href="http://www.netstermsc.com">http://www.netstermsc.com</a>
Description	<p><b>Head Office - Malaysia:</b>                  246-248, Block A, Kelana Centre Point,                  No. 3, Jalan SS7/19, Kelana Jaya,                  47301 Petaling Jaya, Selangor, Malaysia.</p>		

## 1.3 Contact Management

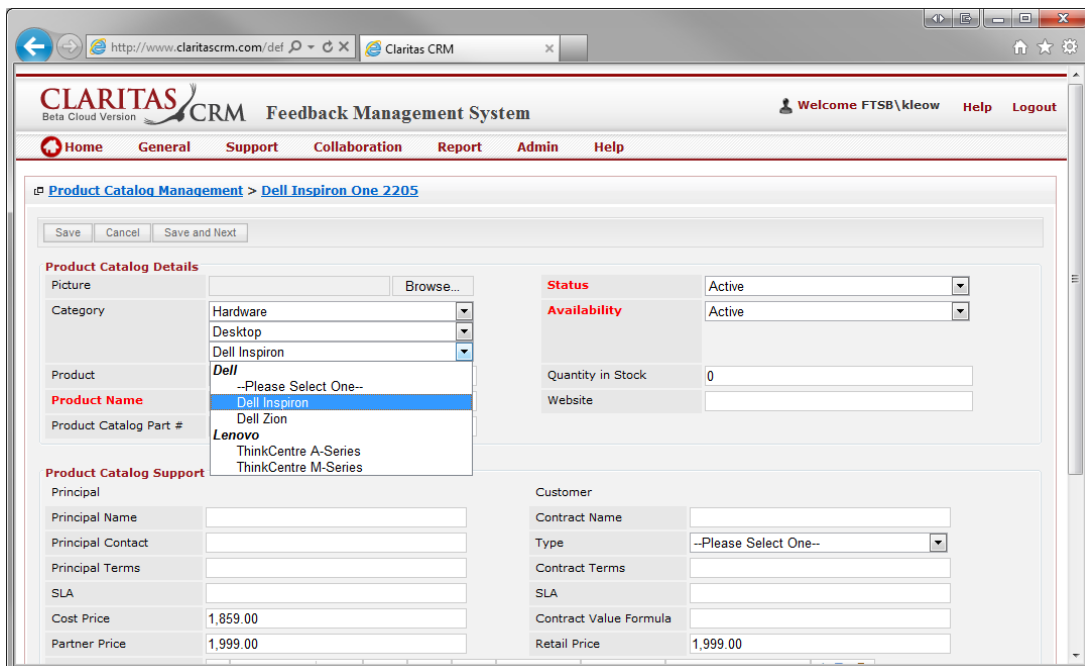
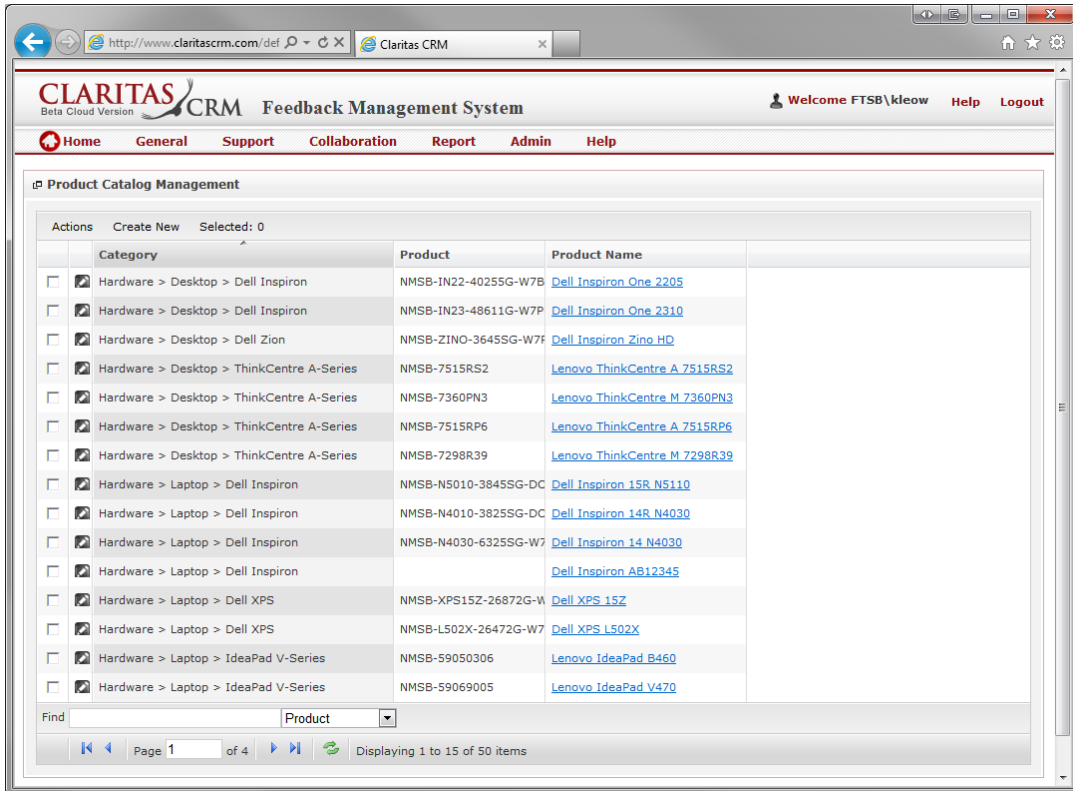
The screenshot shows a web browser window displaying the CLARITAS CRM Feedback Management System. The browser address bar shows the URL <http://www.claritascrm.com/def>. The page header includes the CLARITAS logo, the text "Beta Cloud Version CRM Feedback Management System", and a user greeting "Welcome FTSB\kleow" with links for "Help" and "Logout". A navigation menu contains "Home", "General", "Support", "Collaboration", "Report", "Admin", and "Help".

The main content area is titled "Contact Management" and contains a "Save" and "Cancel" button at the top. The form is organized into several sections:

- Contact Details:** Includes fields for "Picture" (with a "Browse..." button), "Salutation" (dropdown menu), "First Name", "Last Name", "Status" (dropdown menu, currently set to "Active"), "Email", and "Website".
- Business Information:** Includes fields for "Job Title", "Department", "Account" (with a file icon), "Source" (dropdown menu), "Reporting To" (with a file icon), and "Branch" (with a file icon).
- Correspondence Address:** Divided into "Home" and "Business" sections. Each section has fields for "Address 1", "Address 2", "Address 3", "City", "Postcode", "State", and "Country" (dropdown menu). The "Business" section also includes fields for "Business Phone" and "Fax".
- Other Information:** Includes fields for "Occupation" (dropdown menu), "Date Of Birth", "Marital Status" (dropdown menu), "NRIC", and "Gender" (dropdown menu).

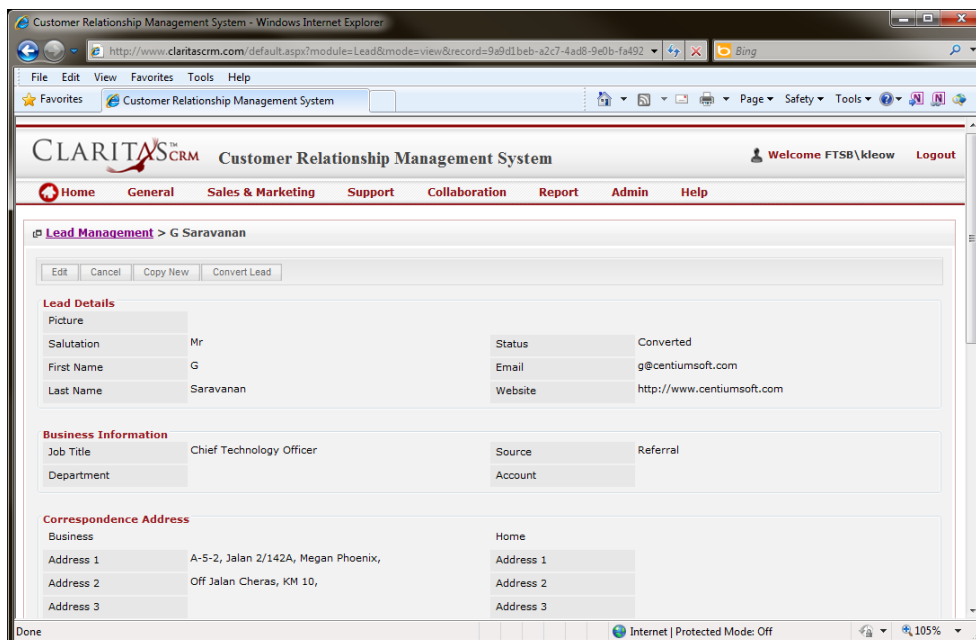
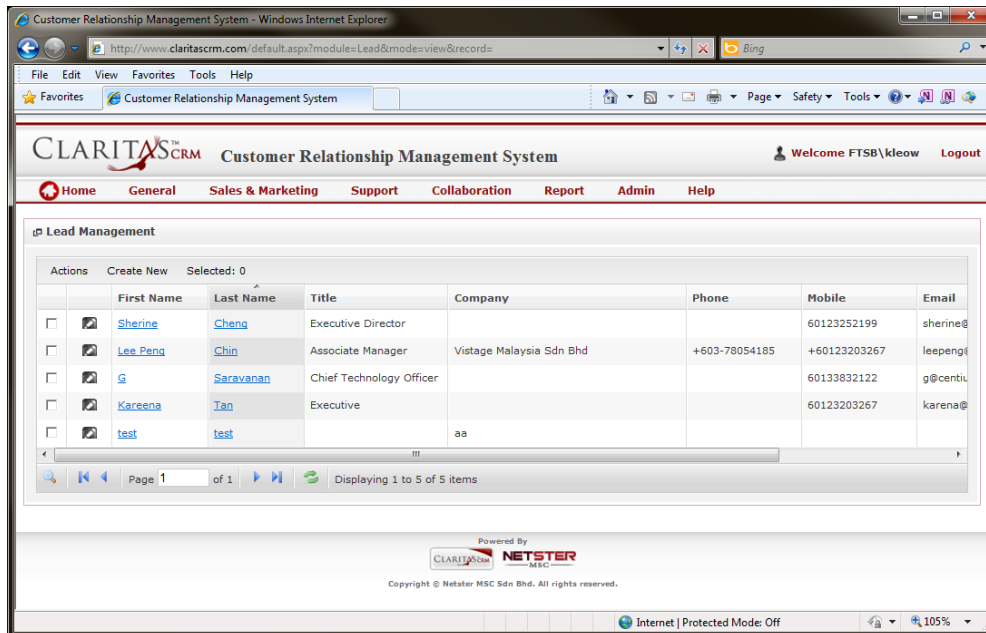
At the bottom of the form is a "Note" section with a rich text editor toolbar (containing icons for Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Print, and other functions) and a large text area for notes. "Save" and "Cancel" buttons are located at the bottom of the form.

## 1.4 Product Catalog Management

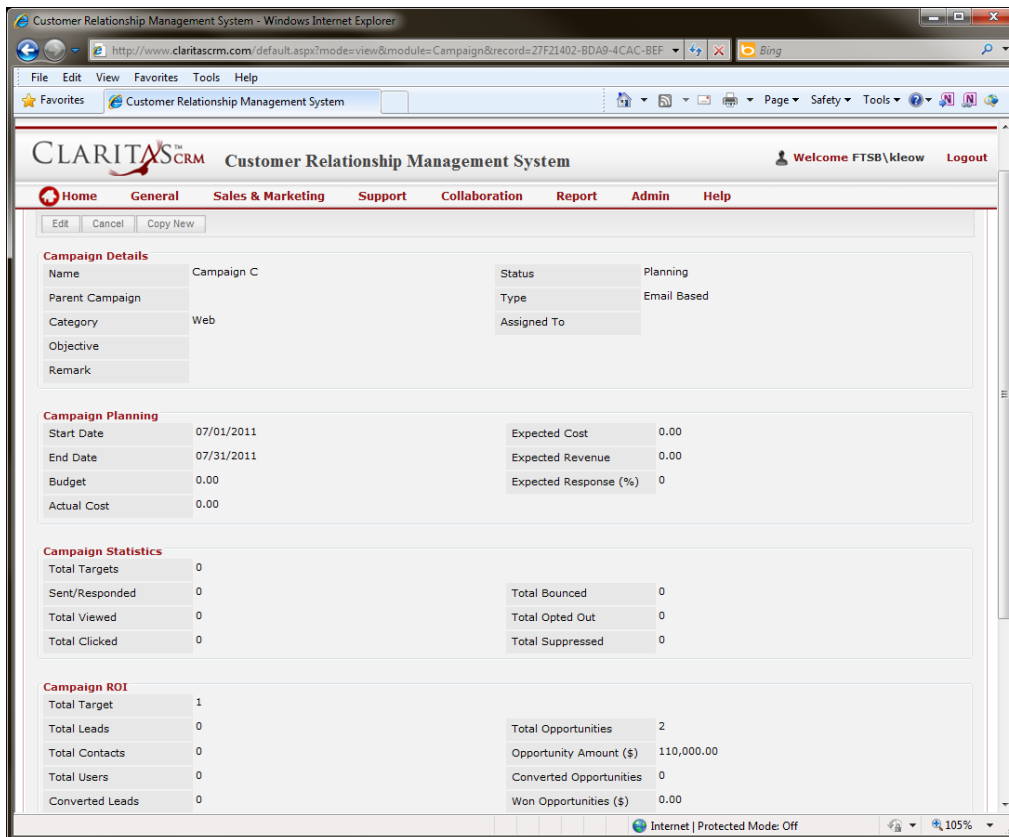
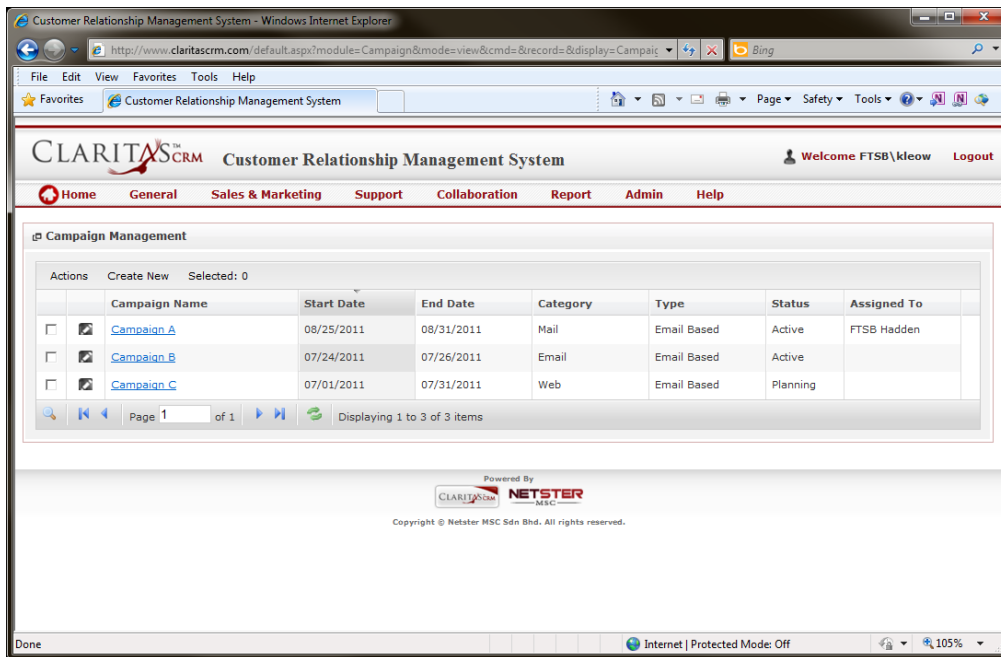


## 2 CRM: Sales & Marketing

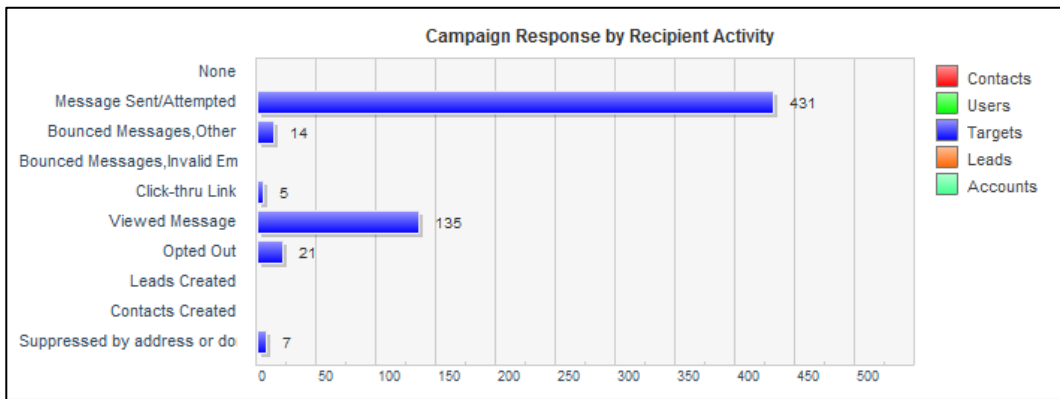
### 2.1 Lead Management



## 2.2 Campaign Management



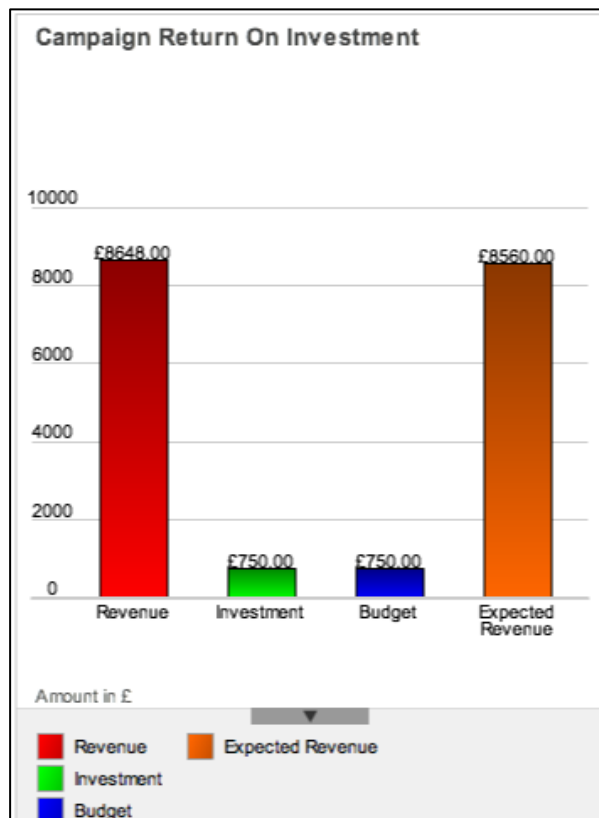




Message Queue (1 - 2 of 2)

Recipient Name	Recipient Email	Marketing Id	Send On
Pooi Lay Lai	pllai@uoa.com.my	Merry Christmas 2011	12/23/2011 02:00am
Helmi Ali Aff	helmi@aviven.net	Merry Christmas 2011	12/23/2011 02:00am

- Message Sent/Attempted
- Viewed Message
- Click-thru Link
- Leads Created
- Contacts Created
- Bounced Messages,Invalid Email
- Bounced Messages,Other
- Opted Out
- Suppressed by Email Address or domain



## 2.3 Opportunity Management

The screenshot shows the CLARITAS CRM interface in Internet Explorer. The browser address bar displays the URL: `http://www.claritascrm.com/default.aspx?module=Opportunity&mode=view&cmd=&record=`. The page title is "Customer Relationship Management System". The navigation menu includes: Home, General, Sales & Marketing, Support, Collaboration, Report, Admin, Help. The user is logged in as "Welcome FTSB\kleow".

The main content area is titled "Opportunity Management" and contains a table with the following data:

Actions	Date	Name	Customer	Company	Amount	Expected Close Date
<input type="checkbox"/>	08/15/2011 08:19 PM	<a href="#">Vistage Malaysia: Test Opportunity</a>	Sherine Cheng	Vistage Malaysia Sdn Bhd	10,000.00	08/16/2011
<input type="checkbox"/>	08/11/2011 10:59 AM	<a href="#">oversea</a>		aa	100.00	08/31/2011
<input type="checkbox"/>	08/01/2011 04:32 PM	<a href="#">Vistage: Opportunity</a>	Lee Peng Chin	Vistage KL Sdn Bhd	10,000.00	08/31/2011
<input type="checkbox"/>	07/31/2011 04:26 PM	<a href="#">Centium Opportunity</a>	G Saravanan	Centium Software Sdn Bhd	100,000.00	07/25/2011
<input type="checkbox"/>	07/28/2011 11:56 AM	<a href="#">Purchase of Hardware Equipment</a>	Aaron Chong	Pena Builders Sdn Bhd	1,000,000.00	07/31/2011
<input type="checkbox"/>	07/28/2011 12:39 AM	<a href="#">Pena Builders - Opportunity #01</a>	WC Ho	Pena Builders Sdn Bhd	50,000.00	07/31/2011
<input type="checkbox"/>	07/27/2011 08:51 PM	<a href="#">Opp_B</a>			900.00	09/30/2011
<input type="checkbox"/>	07/20/2011 09:04 PM	<a href="#">Kha Chun outsource</a>	Fong Kha Chun	aa	20,000.00	07/22/2011

At the bottom of the table, it indicates "Page 1 of 1" and "Displaying 1 to 8 of 8 items".

The screenshot shows the CLARITAS CRM interface in Internet Explorer, displaying the edit form for the opportunity "Purchase of Hardware Equipment". The browser address bar shows the URL: `http://www.claritascrm.com/default.aspx?module=Opportunity&mode=edit&cmd=&record=f2de7d28-65f5-4c1d-...`. The page title is "Customer Relationship Management System". The navigation menu is the same as in the previous screenshot. The user is logged in as "Welcome FTSB\kleow".

The form is titled "Opportunity Management > Purchase of Hardware Equipment" and includes the following fields:

- Opportunity Name:** Purchase of Hardware Equipment
- Source:** Partner
- Type:** New Business
- Account:** Netster MSC Sdn Bhd
- Contact:** (empty)
- Campaign:** (empty)
- Next Step:** (empty)
- Sales Status:** Prospecting
- Probability (%):** 50
- Assigned To:** Kelvin Leow
- Amount:** 1,000,000.00
- Expected Close Date:** 07/31/2011
- Time Remaining:** 17 Day(s) Overdue

There are "Save", "Cancel", and "Save and Next" buttons at the top and bottom of the form. Below the form is a "Description" field with a rich text editor containing the text: "This is valued customer. Please follow up closely."

## 2.4 Quote Management

Customer Relationship Management System - Windows Internet Explorer

http://www.claritascrm.com/default.aspx?module=Quote&mode=edit&cmd=EDIT\_QUOTE&record=80C899B8-4

File Edit View Favorites Tools Help

Customer Relationship Management System

CLARITAS CRM Customer Relationship Management System

Welcome FTSB\kleow Logout

Home General Sales & Marketing Support Collaboration Report Admin Help

Quote Management > QT20110721-02

Save Cancel Save and Next

**Quote Details**

Quotation	QT20110721-02	<b>Status</b>	Negotiation
<b>Title</b>	Quotation for eCommerce	<b>Payment Terms</b>	Net 14 Days
<b>Account</b>	Netster MSC Sdn Bhd	Assigned To	Kelvin Leow
Contact	Robert Chong	Reference Number 1	
Opportunity		Quote Discount (\$)	100.00
<b>Quotation Date</b>	08/30/2011	Quote Tax (\$)	250.00
<b>Valid Until</b>	08/31/2011	Validity Remaining	13 Day(s) Remaining

**Correspondence Address**

Copy From Account Copy From Branch Copy From Contact

Billing	Shipping
Address 1	Address 1
Address 2	Address 2
Address 3	Address 3

Done Internet | Protected Mode: Off 105%

Customer Relationship Management System - Windows Internet Explorer

http://www.claritascrm.com/default.aspx?module=Quote&mode=view&record=80C899B8-99FC-4E9B-9F8E-833

File Edit View Favorites Tools Help

Customer Relationship Management System

CLARITAS CRM Customer Relationship Management System

Welcome FTSB\kleow Logout

Home General Sales & Marketing Support Collaboration Report Admin Help

Quote Summary

Quote Total

Refresh

Quote Price	20,210.00
Quote Discount (\$)	100.00
Quote Tax (\$)	250.00
Quote Total	20,360.00

**Quote Items**

Create New

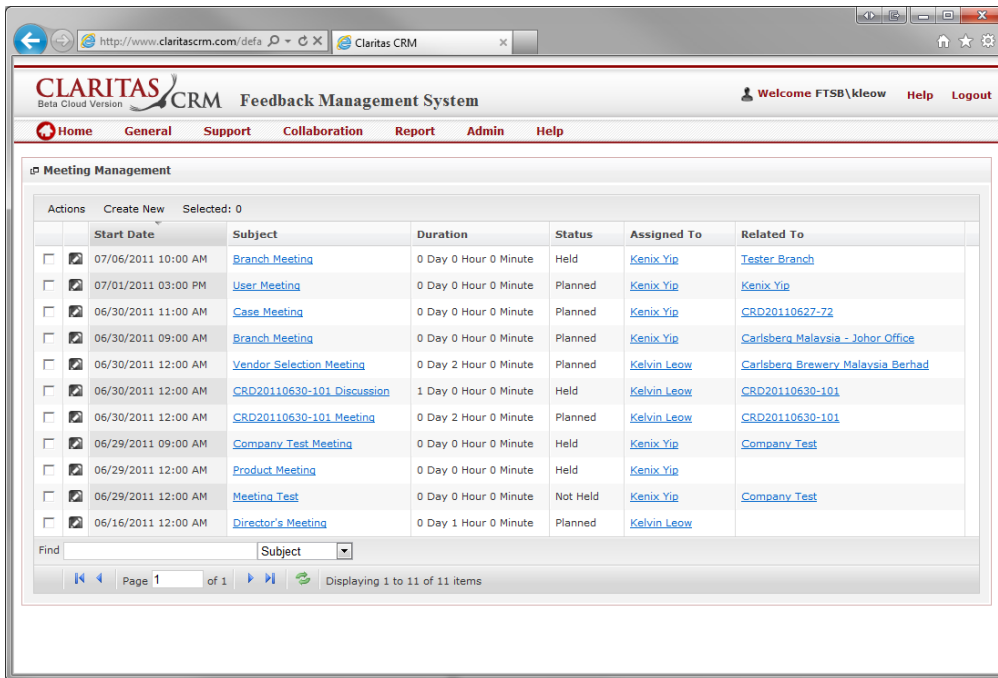
Order	Product Name	Quantity	Cost Price	Unit Price	Discount (\$)	Tax (\$)	Total Price	Delete
0	Product B	1	0.00	10.00	0.00	0.00	10.00	Dele
0	Netster CRM Professional Edition	1	0.00	20,000.00	0.00	0.00	20,000.00	Dele
0	Product A	1	0.00	200.00	0.00	0.00	200.00	Dele

Page 1 of 1 Displaying 1 to 3 of 3 items

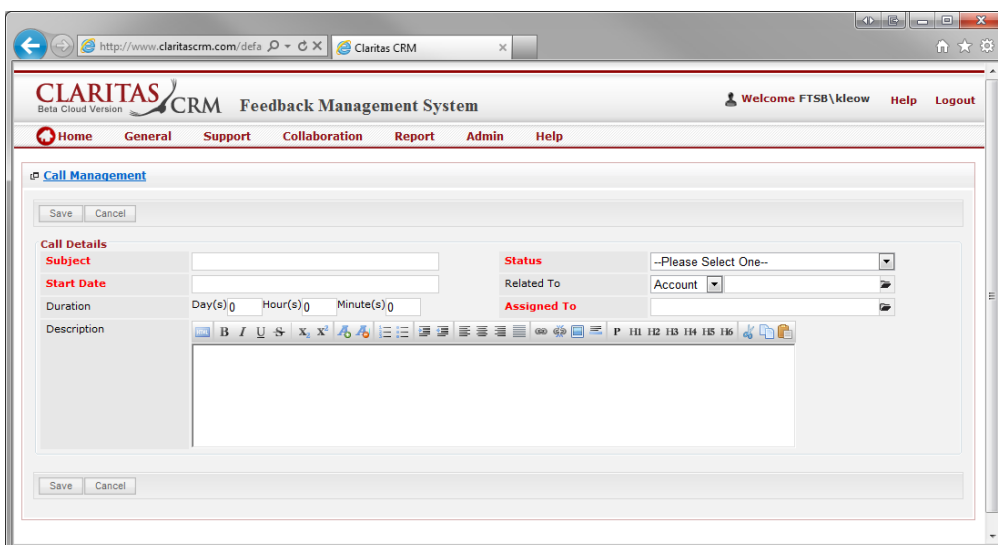
Done Internet | Protected Mode: Off 105%

### 3 CRM: Collaborations

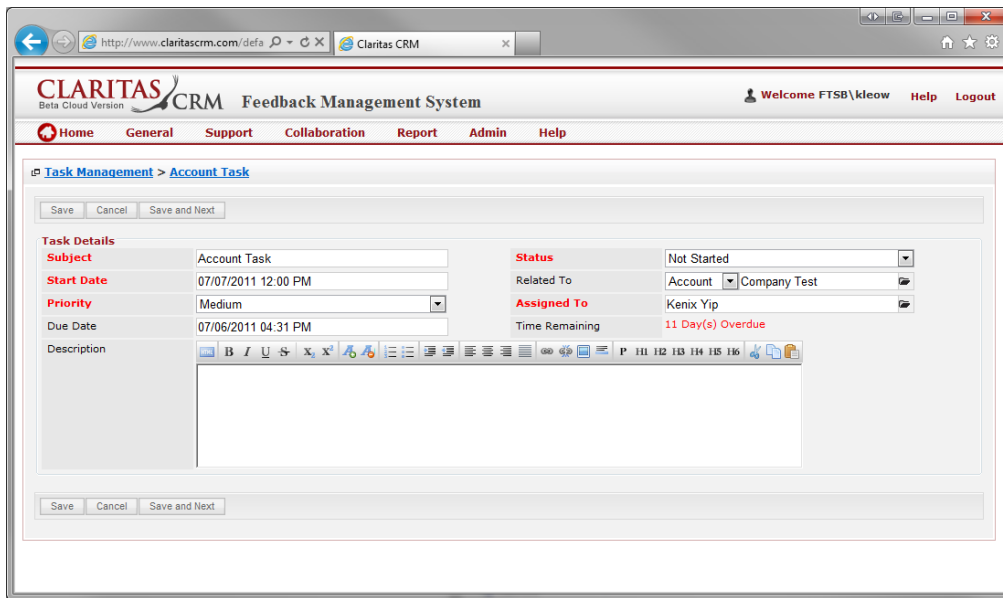
#### 3.1 Scheduling a Meeting



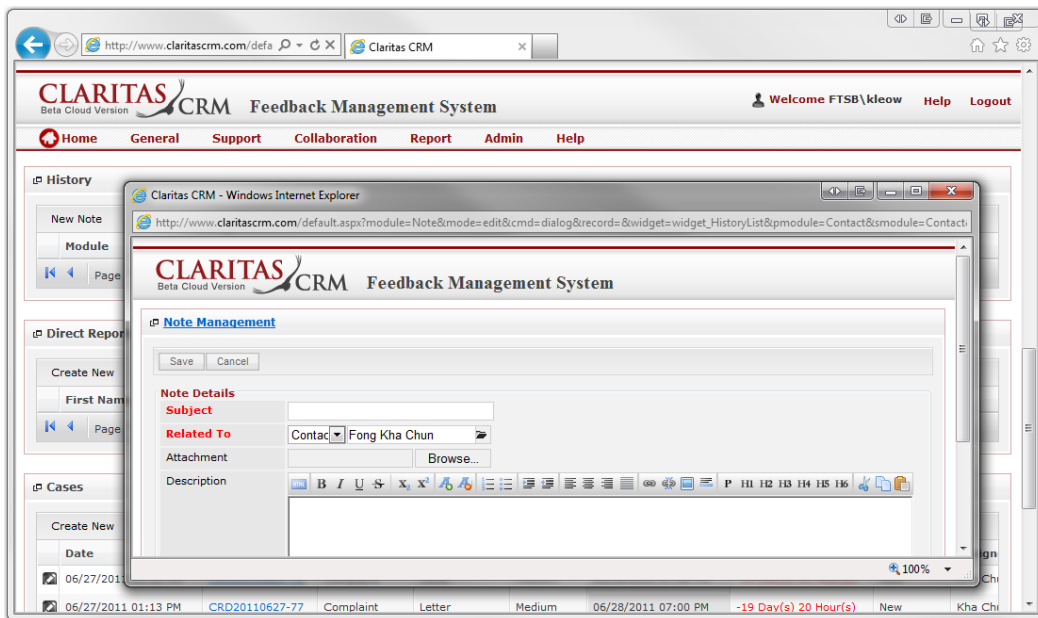
#### 3.2 Planning a Call



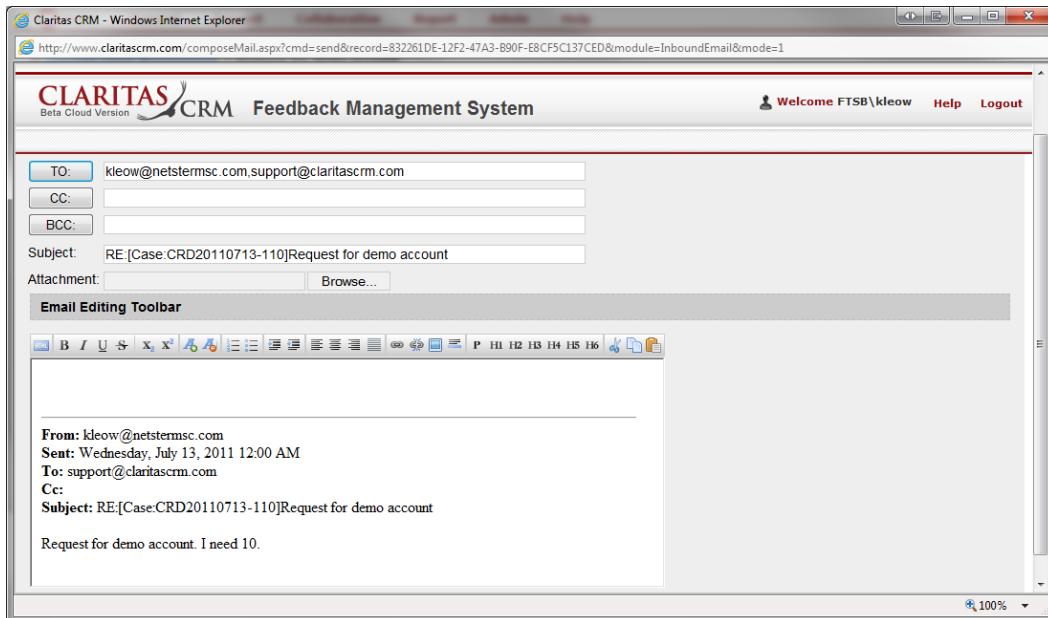
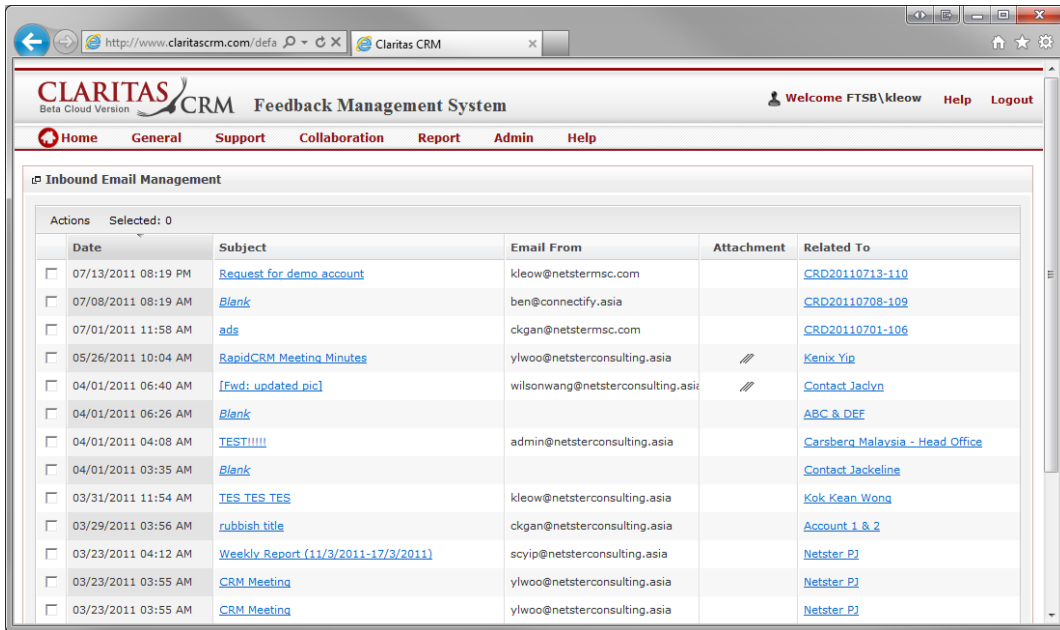
### 3.3 Creating a Task



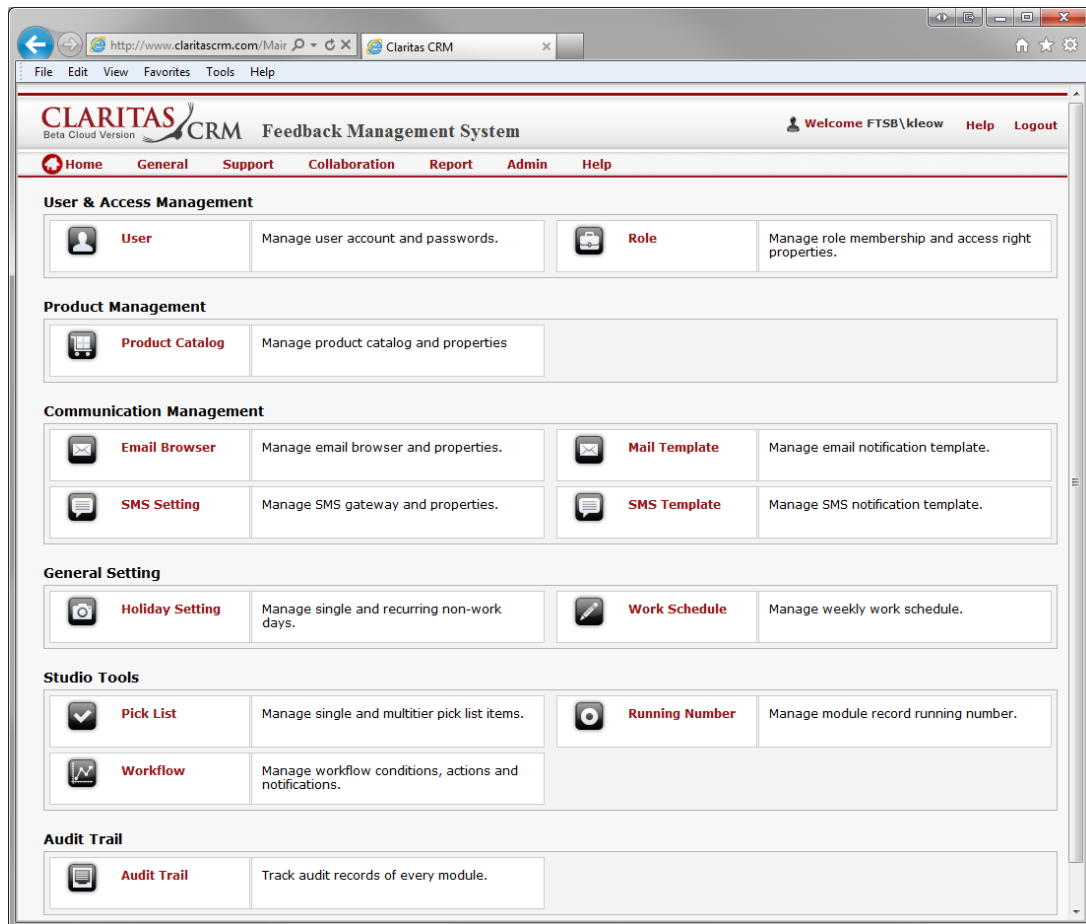
### 3.4 Associating a Note / Attachment



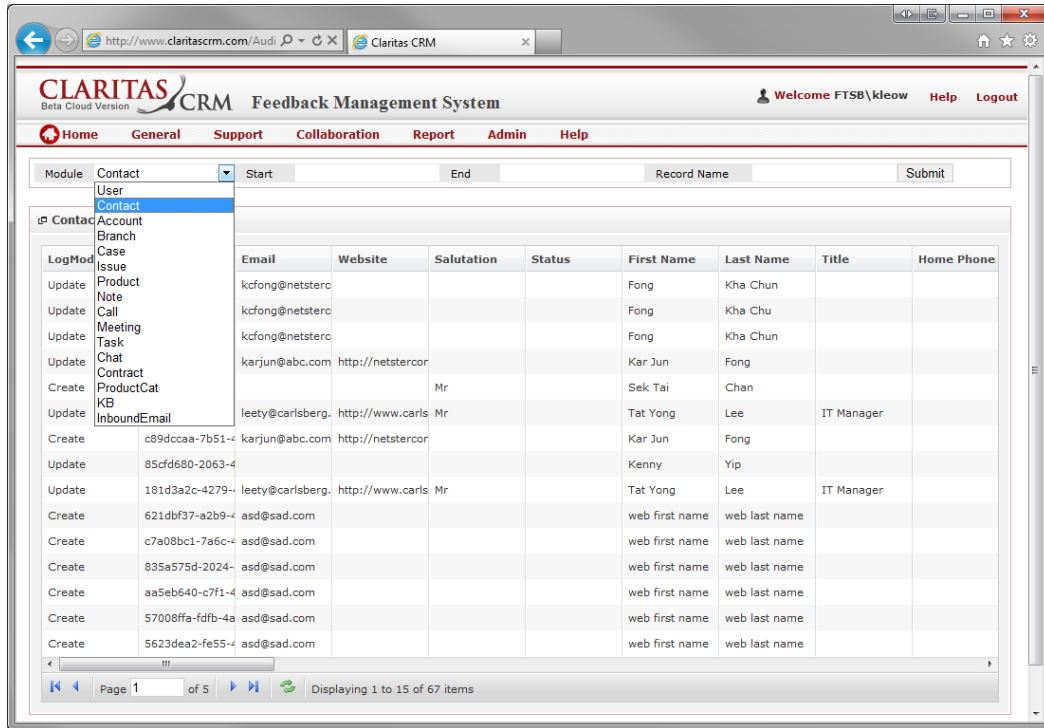
### 3.5 Email Management



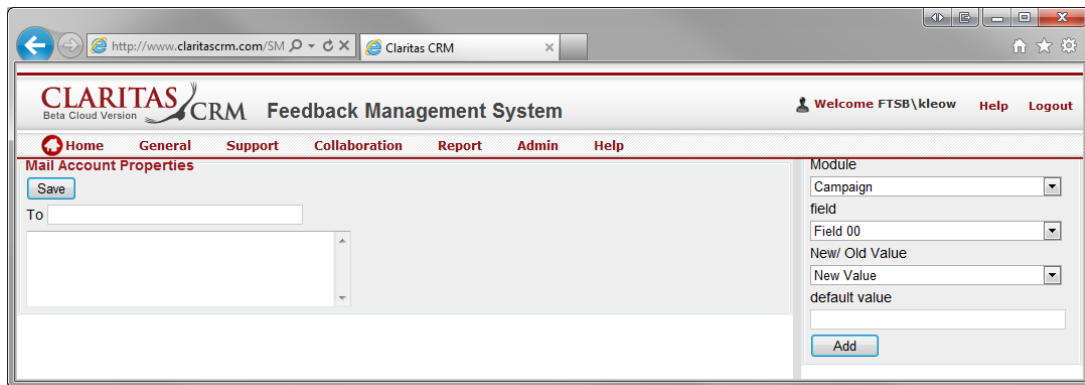
## 4 CRM: Administration



## 4.1 Audit Trail

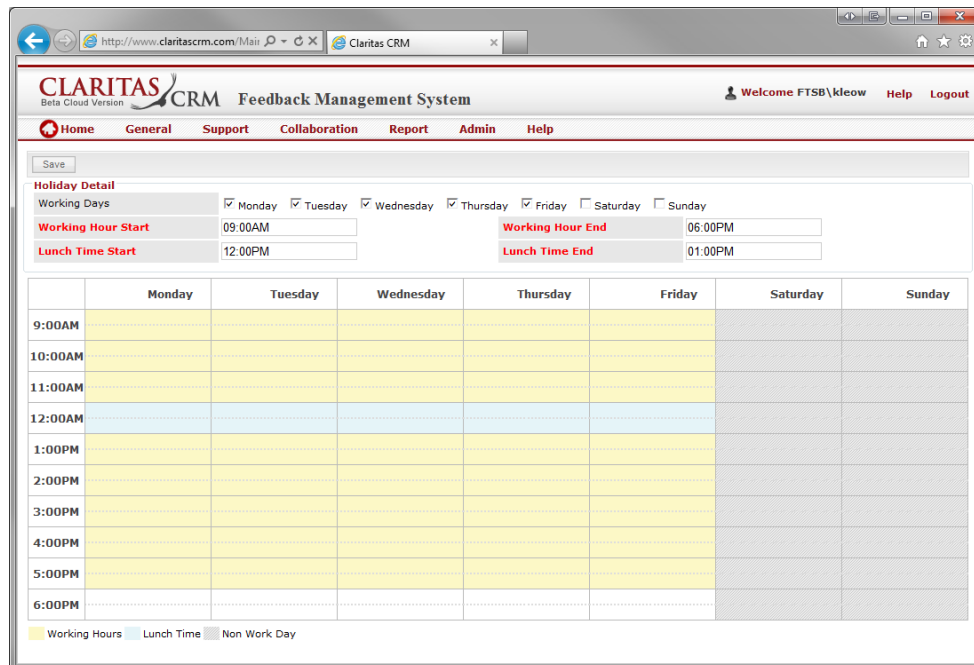
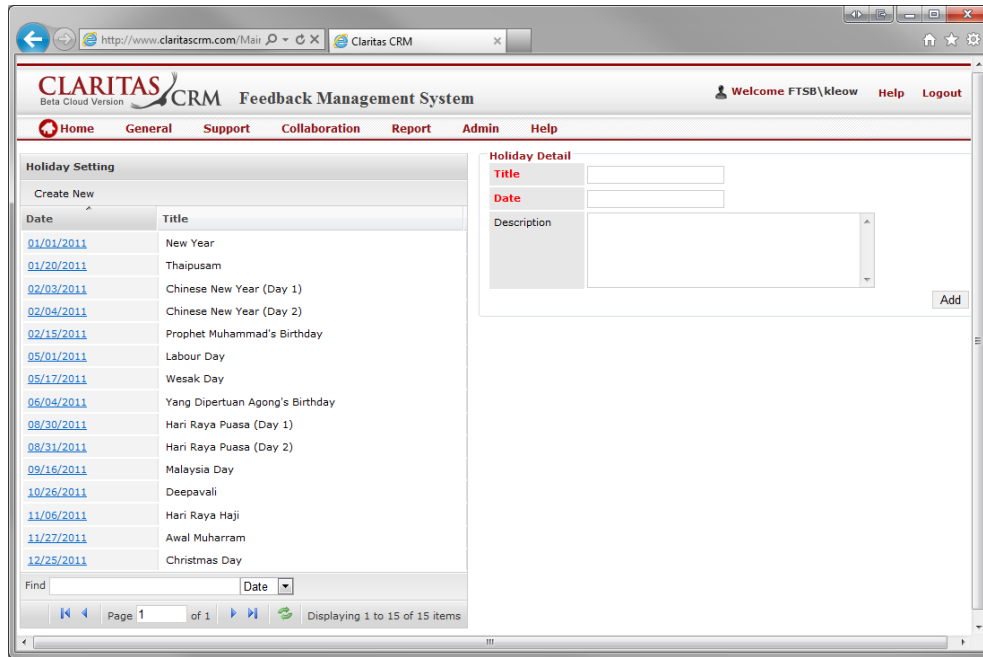


## 4.2 Communication Management (Email & SMS Template)

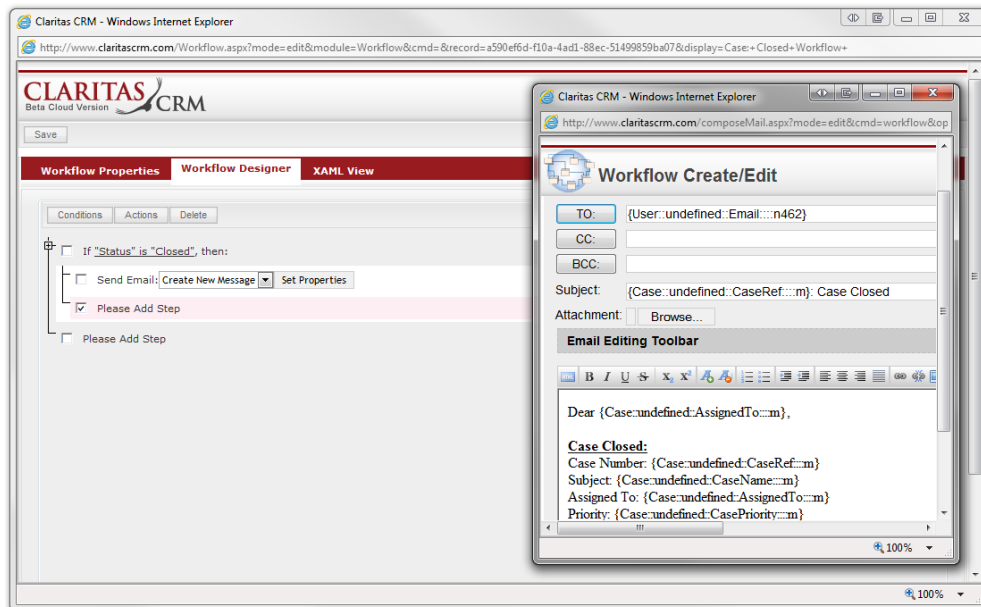
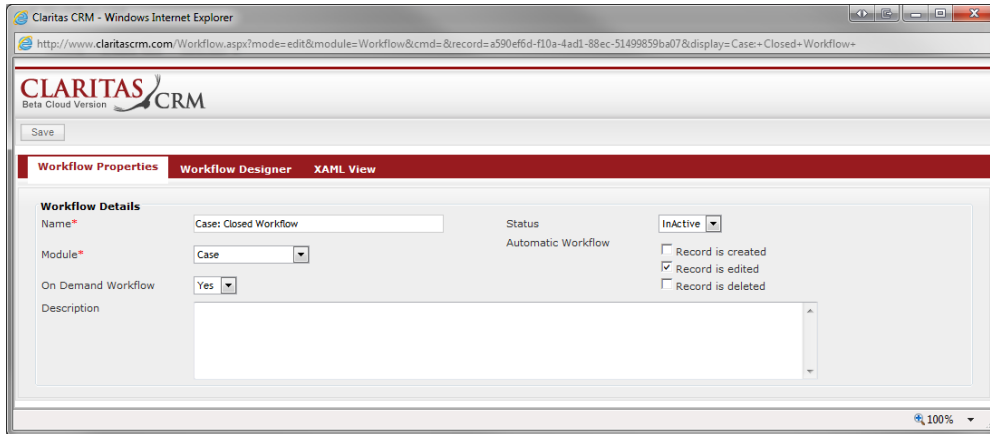




## 4.3 Holidays Setting & Work Schedule



## 4.4 Workflow Management



## 4.5 Studio Tools – Pick list & Running Number

**Pick List Maintenance**

Name	Description
<a href="#">AccountIndustryDropDownCtl</a>	Industry Type List
<a href="#">AccountTypeDropDownCtl</a>	Account Type List
<a href="#">ActivityPriorityDropDownCtl</a>	Activity Priority Type List
<a href="#">CasePriorityDropDownCtl</a>	Case Priority Type List
<a href="#">CaseStatusDropDownCtl</a>	Case Status List
<a href="#">CaseTypeDropDownCtl</a>	Case Type List
<a href="#">ContractTypeDropDownCtl</a>	Contract Type List
<a href="#">CountryDropDownCtl</a>	Country List
<a href="#">GenderDropDownCtl</a>	Gender List
<a href="#">IssueCat1DropDownCtl</a>	Issue Category Level 2.1 List
<a href="#">IssueCat2DropDownCtl</a>	Issue Category Level 2.2 List
<a href="#">IssueCat3DropDownCtl</a>	Issue Category Level 2.3 List
<a href="#">IssueCatDropDownCtl</a>	Issue Category Level 1 List
<a href="#">IssuePriorityDropDownCtl.xml</a>	Issue Priority Type List
<a href="#">IssueStatusDropDownCtl.xml</a>	Issue Status List

Find:  Name

Page 1 of 3 | Displaying 1 to 15 of 40 items

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**Pick List Detail**

Name: CaseStatusDropDownCtl  
Description: Case Status List  
Allow Null:

Items:

Value	Link To	Display	Default
0	--None--	New	<input type="checkbox"/>
1	--None--	Assigned	<input type="checkbox"/>
2	--None--	Closed	<input type="checkbox"/>
3	--None--	Pending Input	<input type="checkbox"/>
4	--None--	Rejected	<input type="checkbox"/>
5	--None--	Duplicate	<input type="checkbox"/>

[Add Item](#)

**Running Number Maintenance**

Field Name	Module
<a href="#">Purchase</a>	Product
<a href="#">Issue</a>	Issue
<a href="#">Contract</a>	Contract
<a href="#">Case</a>	Case

Page 1 of 1 | Displaying 1 to 12 of 12 items

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**Running Number Detail**

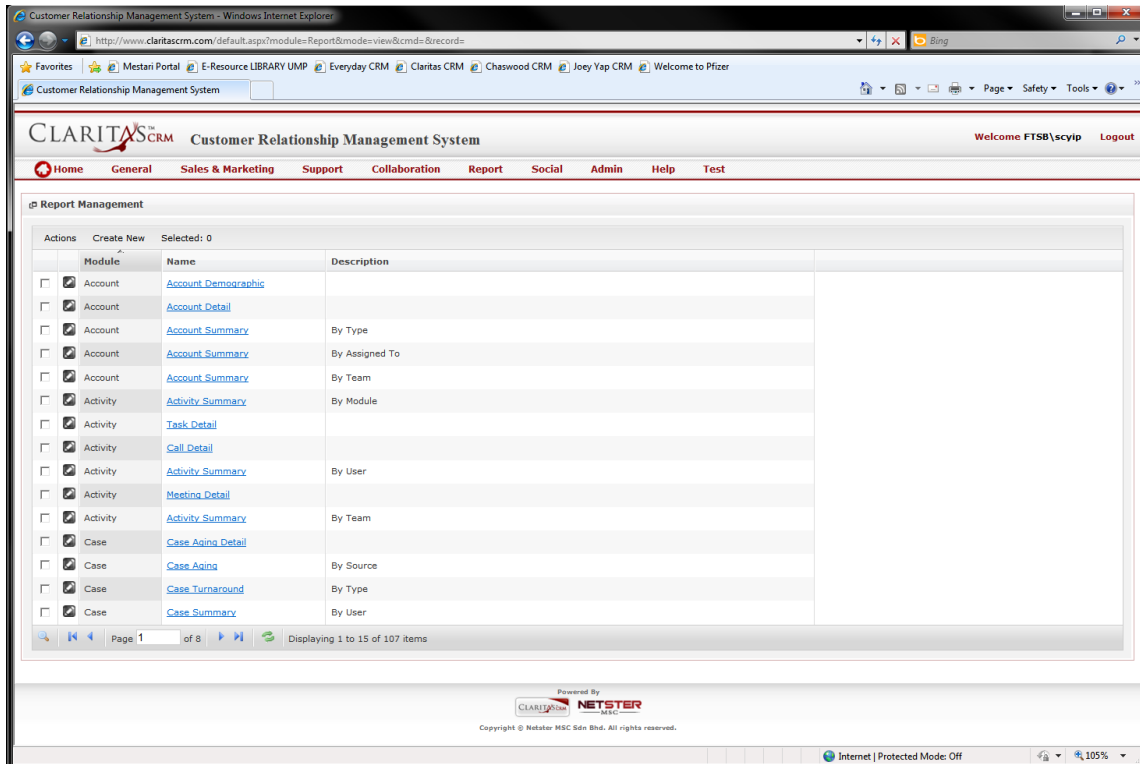
Module: Case  
Name: CaseRef  
Next Running Number: 111  
Format: CRD[DT:yyyyMMdd]-{2%1}

**Example:**  
{6%1} -- 000002  
{3%1} -- 003

**Date:** {DT:yyyyMMdd} -- 20110529  
{DT:MMMM} -- January

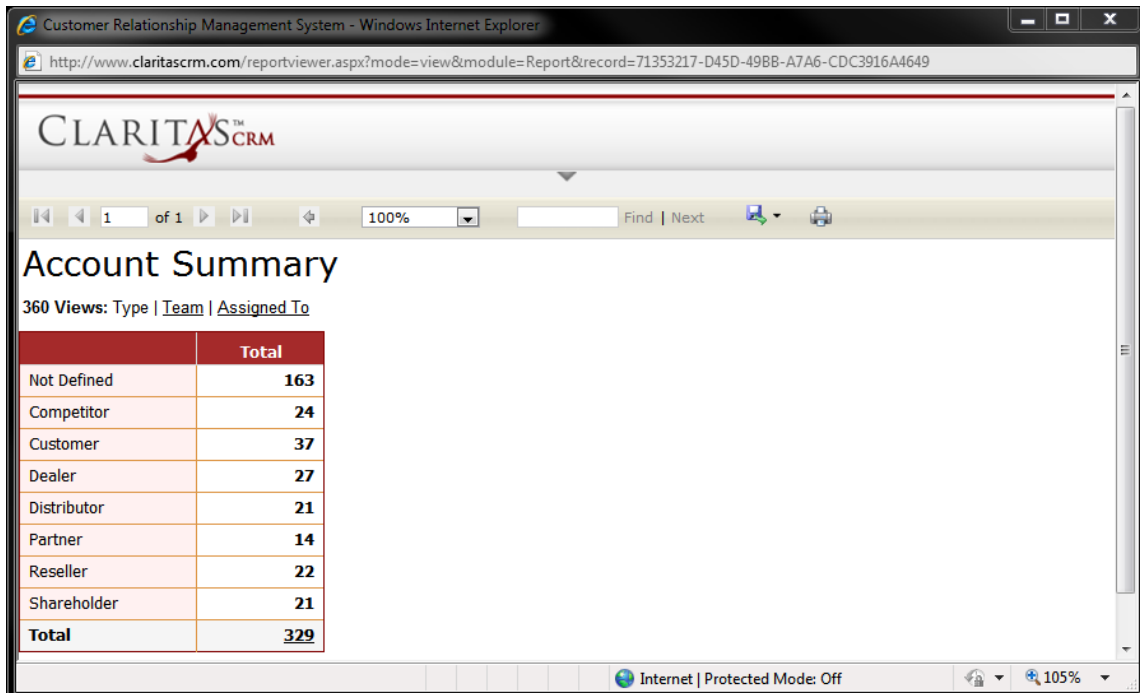
## 5 CRM: Reporting (Sample Reports)

### Report Listing

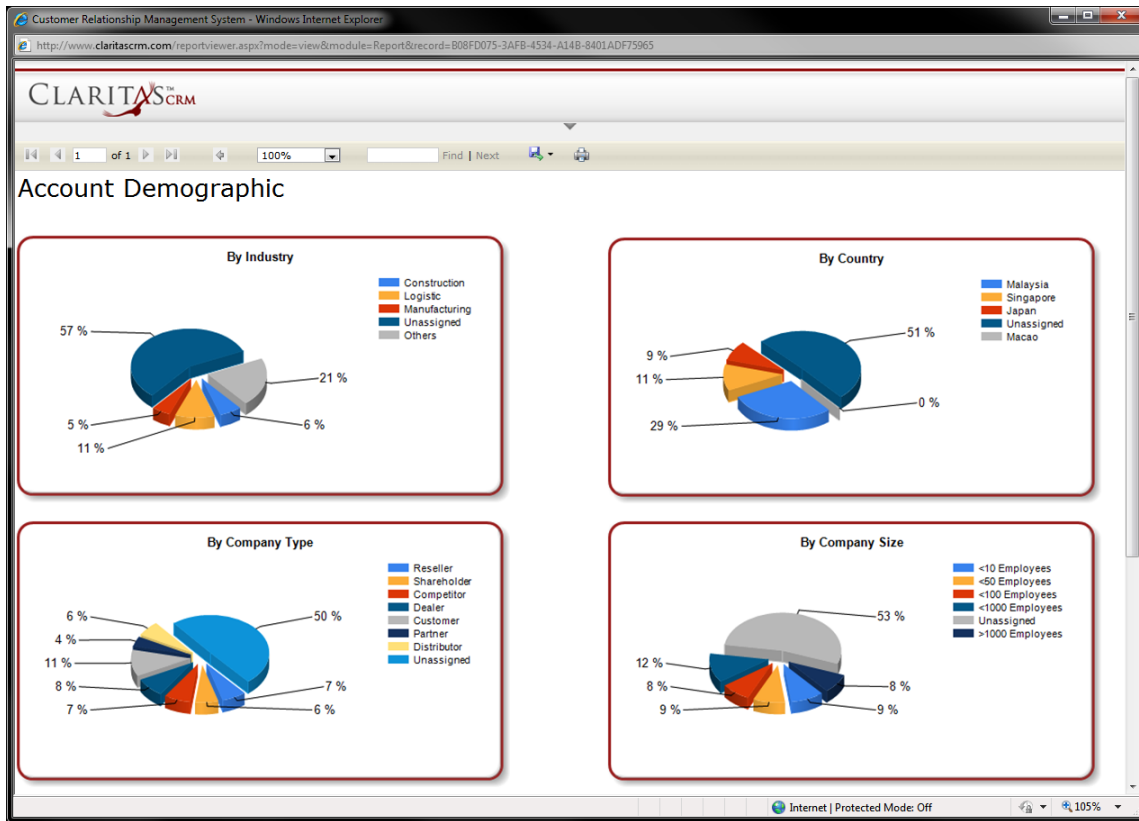


### Account Reports

#### - Account Summary Report



#### - Account Demographic Report



- Account Detail Report

Customer Relationship Management System - Windows Internet Explorer  
 http://www.claritascrm.com/reportviewer.aspx?mode=view&module=Report&record=6C390689-3044-42A0-871A-E6D232268DD4

CLARITAS<sup>TM</sup> CRM

Account Detail

No	Company	Type	Industry	Country	Phone	Fax
1	Technicom-chemie (India) Ltd.	Reseller	Telecommunication	Malaysia	-	-
2	Thanjavur Investment Ltd.	Shareholder	Construction	Singapore	-	-
3	Technova Hichem Systems Ltd.	Competitor	Nonprofit	Singapore	-	-
4	Tirupati Services Ltd.	Dealer	Postal	Malaysia	-	-
5	天天	Dealer	Postal	Malaysia	-	-
6	Timarpur-okhla Waste Mgmt. Co. Pvt. Ltd.	Competitor	Nonprofit	Malaysia	-	-
7	Tecil Engineering Ltd.	Reseller	Telecommunication	Malaysia	-	-
8	Tensile Steel Ltd.	Competitor	Telecommunication	Malaysia	-	-
9	Tirupati Fibres & Inds. Ltd.	Customer	Telecommunication	Malaysia	-	-
10	Tokyo Finance Ltd.	Customer	Telecommunication	Malaysia	-	-

Done

Internet | Protected Mode: Off

## Contact Reports

### - Contact Summary Report

Customer Relationship Management System - Windows Internet Explorer  
 http://www.claritascrm.com/reportviewer.aspx?mode=view&module=Report&record=EA73C634-45A5-4F86-8E10-EA41A832E5B3

**CLARITAS™ CRM**

1 of 1 100% Find | Next

### Contact Summary

360 Views: Source | Account | Team | User

	Total
-	22
Campaign	5
Cold Call	1
Existing	3
Referral	3
Trade Show	5
Website	7
<b>Total</b>	<b>46</b>

Done Internet | Protected Mode: Off 105%

### - Contact Detail Report

Customer Relationship Management System - Windows Internet Explorer  
 http://www.claritascrm.com/reportviewer.aspx?mode=view&module=Report&record=7D3DCF38-46CA-4966-9021-F12562E3C8B#P0:c3ef2fa5db443ea1fefcd4a289a6\_2\_21170

**CLARITAS™ CRM**

1 of 1 100% Find | Next

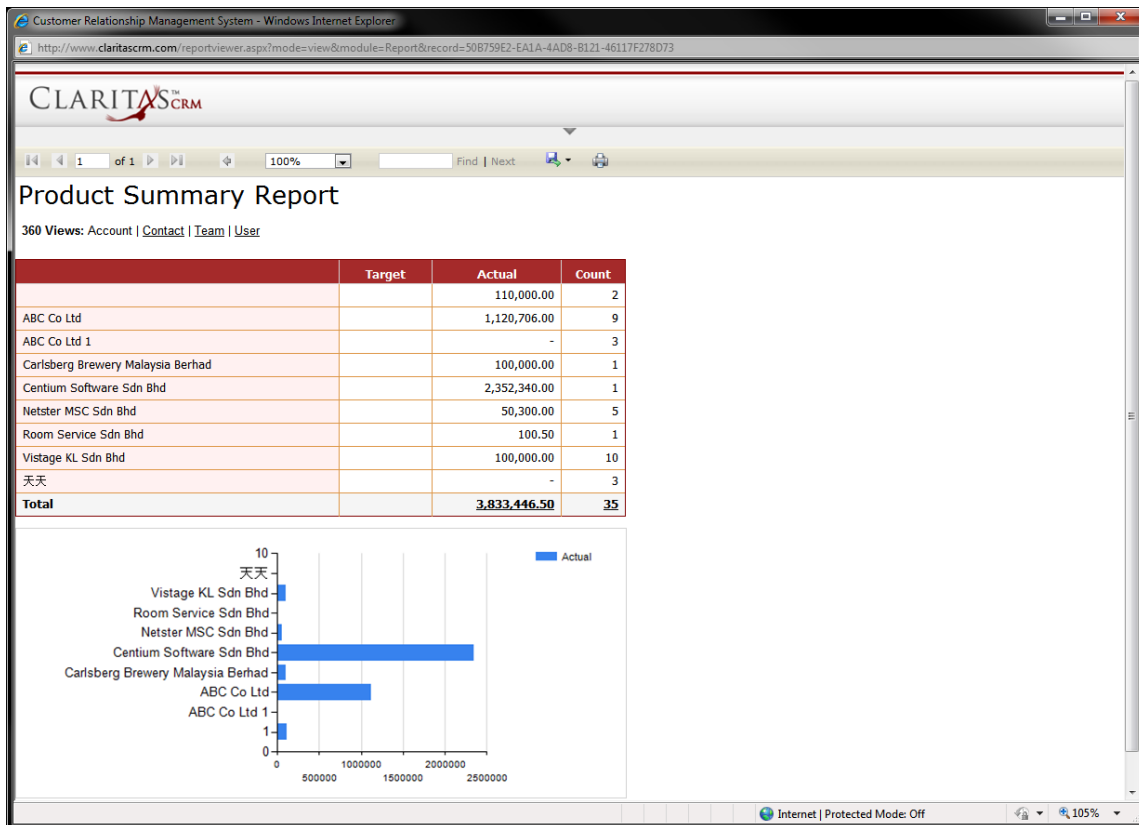
### Contact Detail Report

No	First Name	Last Name	Title	Company	Phone	Mobile	Email
<b>ABC Co Ltd</b>							
1	-	Big Momma	-	ABC Co Ltd	-	-	-
2	-	Nazri	-	ABC Co Ltd	-	-	-
3	-	Zamperi	-	ABC Co Ltd	-	-	-
4	ckgan@netstermsc.com	ckgan@netstermsc.com	-	ABC Co Ltd	-	-	ckgan@netstermsc.com
5	ckgan@netstermsc.com	ckgan@netstermsc.com	-	ABC Co Ltd	-	-	ckgan@netstermsc.com
6	ckgan@netstermsc.com	ckgan@netstermsc.com	-	ABC Co Ltd	-	-	ckgan@netstermsc.com
7	Johnny	Wong	-	ABC Co Ltd	-	-	john DOE@email.com
<b>ABC Co Ltd 1</b>							
8	Gan	Chin Kiat	Test 2nd time	ABC Co Ltd 1	0123456789	0123456879	ckgan@netstermsc.com
9	Gan	Chin Kiat	Test 3rd time	ABC Co Ltd 1	0123456789	0123456879	ckgan@netstermsc.com
10	Gan	Chin Kiat	Test 5th time	ABC Co Ltd 1	0123456789	0123456879	ckgan@netstermsc.com
11	Gan	Chin Kiat	Test 5th time	ABC Co Ltd 1	0123456789	0123456879	ckgan@netstermsc.com

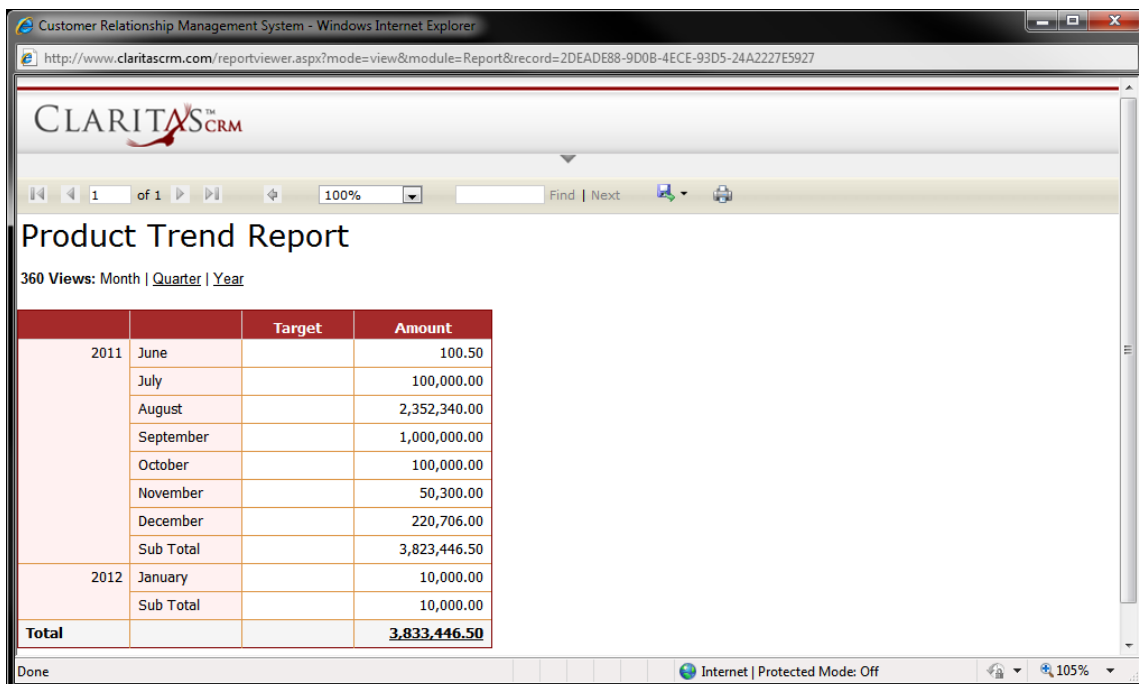
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## Product Reports

### - Product Summary Report



### - Product Trend Report

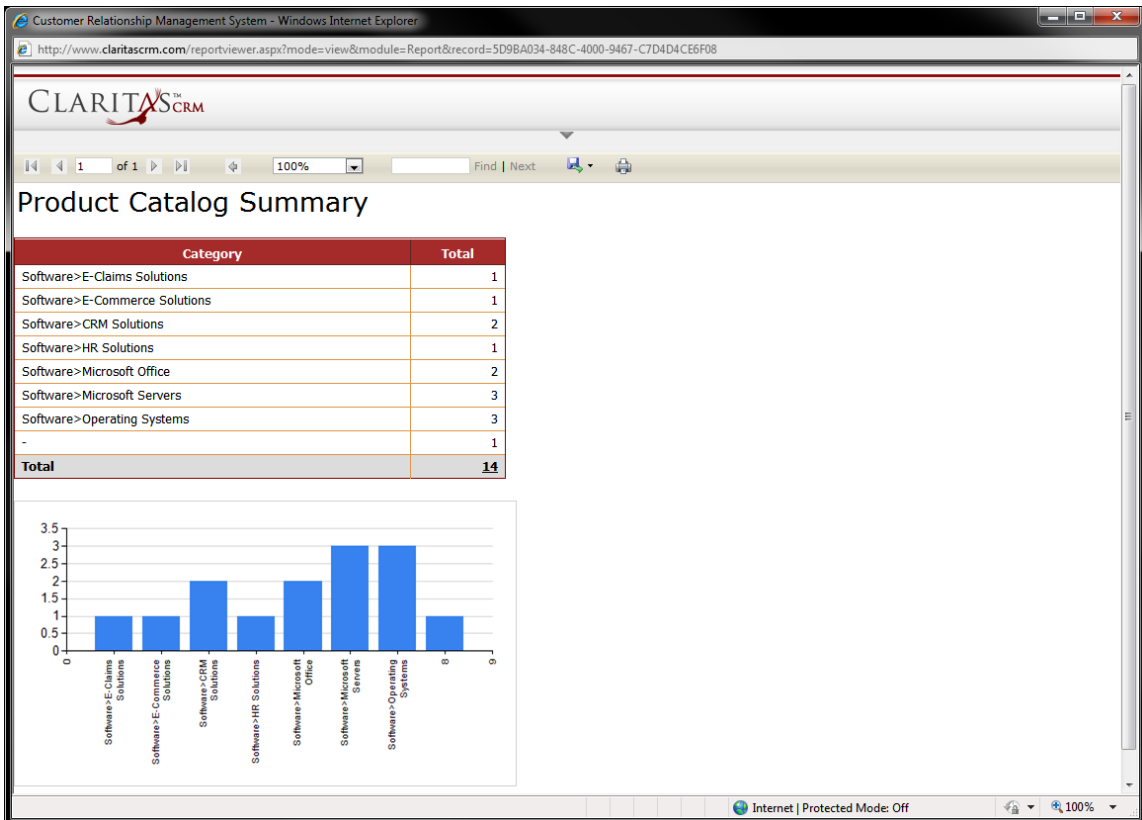


- **Product Detail Report**

No	Date	Product	Name	Customer	Company	Amount	Status
1	12/23/2011 3:52:17 PM	PROD20110628-03	NMS8-7515RS2	G Sarawan	天天	-	Active
2	12/20/2011 7:51:30 PM	PROD20111220-30	ljshdksahkjdhkas	-	ABC Co Ltd 1	-	Active
3	12/21/2011 11:01:17 AM	PROD20111221-42	Test Convert Final	-	ABC Co Ltd	10,706.00	Active
4	12/20/2011 7:53:24 PM	PROD20111220-32	Product Name	-	ABC Co Ltd 1	-	Active
5	12/21/2011 10:38:06 AM	PROD20111221-41	Test Convert 6	-	ABC Co Ltd	-	Active
6	12/21/2011 10:21:31 AM	PROD20111221-36	Test Convert 3	-	ABC Co Ltd	-	Active
7	12/23/2011 3:52:17 PM	PROD20111221-43	te	-	天天	-	Active
8	12/21/2011 11:21:38 AM	PROD20111221-44	New Product 1	-	Netster MSC Sdn Bhd	-	Active
9	7/29/2011 6:55:12 PM	PROD20110629-04	Dell EqualLogic PS6000	-	Carlsberg Brewery Malaysia Berhad	100,000.00	Active
10	12/21/2011 10:36:48 AM	PROD20111221-39	-	-	-	-	-

**Product Catalog Reports**

- **Product Catalog Summary Report**





## - Product Catalog Detail Report

No	Date	Product No	Name	Status	Category Description	Cost Price	Partner Price
1	07/25/2011 02:35 PM	-	Workflow Product	Active	Workflow Product	-	-
Hardware>Desktop>Dell Inspiron							
2	06/13/2011 08:23 AM	NMSB-IN22-40255G-W78-BLK	Dell Inspiron One 2205	Active	-	2,205.00	1,999.00
3	06/13/2011 08:53 AM	NMSB-IN23-48611G-W7P-SLR	Dell Inspiron One 2310	Active	-	2,310.00	3,699.00
Hardware>Desktop>Dell Zino							
4	06/13/2011 08:25 AM	NMSB-ZINO-36455G-W7P-CLR	Dell Inspiron Zino HD	Active	-	1,208.00	1,299.00
Hardware>Desktop>ThinkCentre A-Series							
5	06/13/2011 09:04 AM	NMSB-7515RP6	Lenovo ThinkCentre A 7515RP6	Active	-	1,910.00	2,059.00
6	06/13/2011 09:06 AM	NMSB-7515RS2	Lenovo ThinkCentre A 7515RS2	Active	-	2,133.00	2,199.00
7	06/13/2011 09:07 AM	NMSB-7298R39	Lenovo ThinkCentre M 7298R39	Active	-	2,325.00	2,499.00
8	06/13/2011 09:08 AM	NMSB-7360PH3	Lenovo ThinkCentre M 7360PH3	Active	-	2,566.00	2,760.00
Hardware>Laptop>Dell Inspiron							
9	06/13/2011 08:24 AM	NMSB-N4030-63255G-W7P-CLR	Dell Inspiron 14 N4030	Active	-	1,567.00	1,649.00
10	06/13/2011 08:56 AM	NMSB-N4010-38255G-DOS-CLR	Dell Inspiron 14R N4030	Active	-	1,662.00	1,749.00
11	06/13/2011 09:01 AM	NMSB-N5010-38455G-DOS-CLR	Dell Inspiron 15R N5110	Active	-	1,994.00	2,099.00
12	07/04/2011 06:33 PM	-	Dell Inspiron A812345	Active	-	-	-

## Contract Reports

### - Contract Summary Report

360 Views: [Account](#) | [Contact](#) | [Product](#) | [Status](#) | [Team](#) | [User](#)

	Total	Value
ABC Co Ltd	2	-
Carlsberg Brewery Malaysia Berhad	1	10,000.00
Centium Software Sdn Bhd	1	9,999.00
Netster MSC Sdn Bhd	5	-
Room Service Sdn Bhd	1	1,000.00
天天	2	1,200.00
<b>Total</b>	<b>12</b>	<b>22,199.00</b>

## - Contract Detail Report

No	Contract	Name	Type	Account	Product	Amount	Due Date
1	CTRT20111114-06	Netster Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	-	
2	CTRT20111114-07	CRM Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	-	
3	CTRT20111114-08	CMS Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	-	
4	CTRT20110617-01	RS Contract #02	Contract - 12 Month	Room Service Sdn Bhd	Dell Inspiron 14 I4030	1,000.00	6/1/2010 12:00:00 AM
5	CTRT20110811-04	contract	-	天天	-	-	
6	CTRT20120109-11	Contract A	Contract - 12 Month	ABC Co Ltd	Ifraproject	-	
7	CTRT20111114-10	Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	-	
8	CTRT20110628-02	Centium Contract	Contract - 12 Month	Centium Software Sdn Bhd	Dell EqualLogic PS6000	9,999.00	8/24/2011 12:00:00 AM
9	CTRT20110629-03	Carlsberg Contract #22	Contract - 24 Month	Carlsberg Brewery Malaysia Berhad	Dell EqualLogic PS6000	10,000.00	6/29/2012 12:00:00 AM
10	CTRT20110906-05	Contract 2011	Contract - 12 Month	ABC Co Ltd	Purchase of Glenmarie Garden	-	

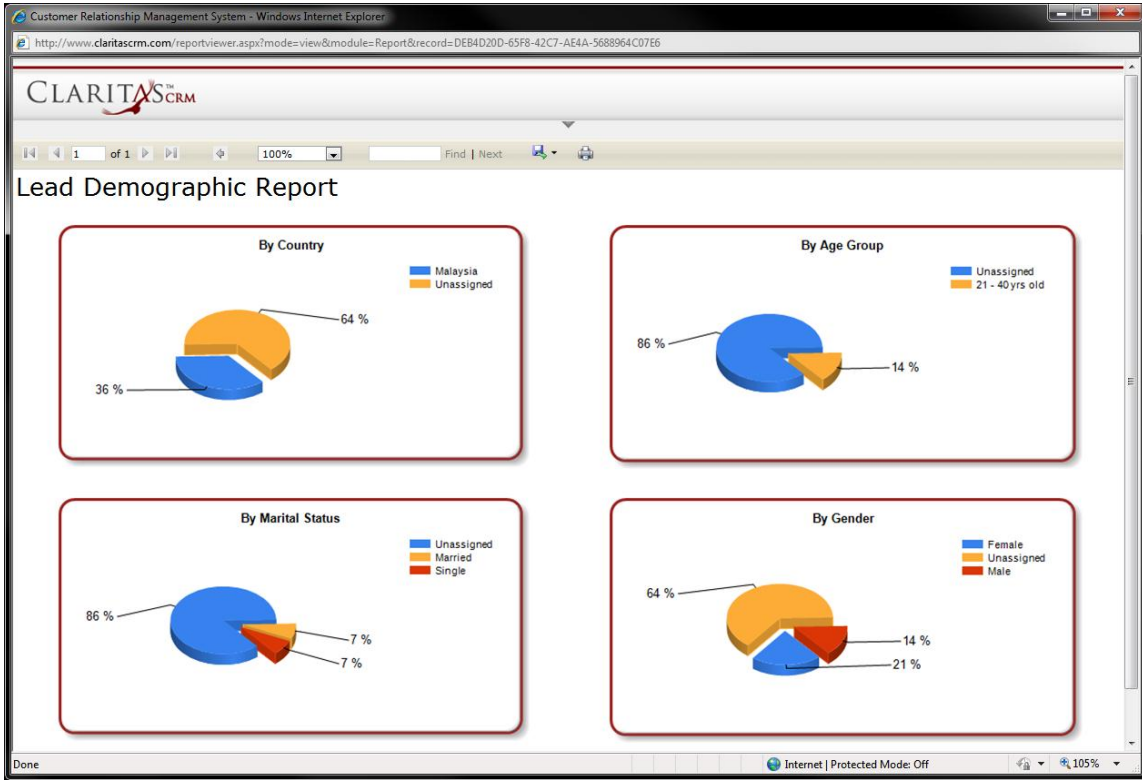
## Lead Reports

### - Lead Summary Report

360 Views: Source | Team | User

	Cold	Converted	New	Warm	Total
	0	2	4	0	6
Campaign	0	1	0	0	1
Conference	0	0	1	0	1
Referral	1	2	1	0	4
Trade Show	0	1	0	1	2
<b>Total</b>	<b>1</b>	<b>6</b>	<b>6</b>	<b>1</b>	<b>14</b>

- **Lead Demographic Report**



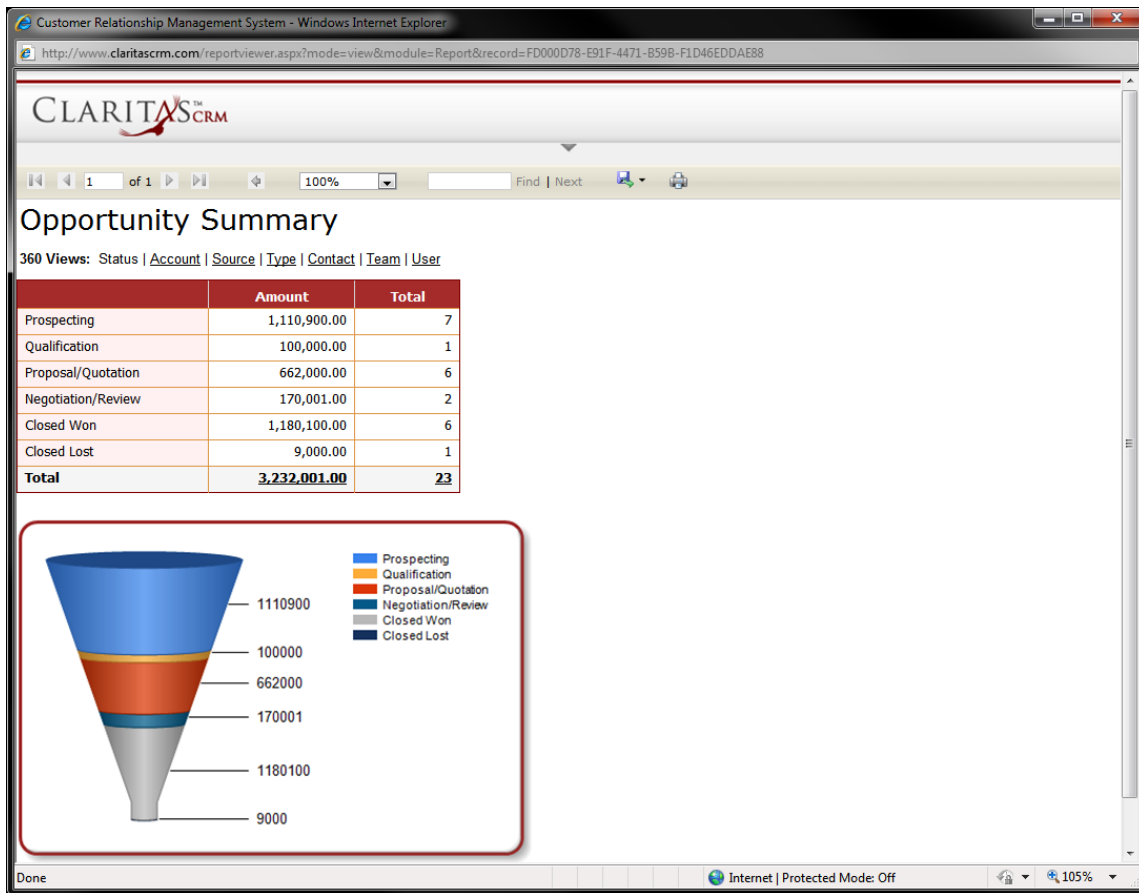
- **Lead Detail Report**

The screenshot shows the 'Lead Detail Report' interface in the CLARITAS CRM system, displaying a table of lead information:

No	First Name	Last Name	Title	Company	Phone	Mobile	Email
1	Anthony	Boird	Manager First Class	-	603-22842199	60123252199	sherine@vistage.com.my
2	Anthony	Boird	Manager First Class	Netster MSC Sdn Bhd	+6078054185	+60175603355	hjtjan@netstermsc.com
3	Yamaha	Yoki	Managing Director	Lily Corporation Limited	603-4578098	-	yamaha@yahoo.com
4	Brandon	Chang	CEO	Netster MSC Sdn Bhd	+6078054185	+60138809898	bcchang@netstermsc.com
5	Kelvin	Leow	COO	Netster MSC Sdn Bhd	+6078054185	+60123456677	kleow@netstermsc.com
6	Lee Peng	Chin	Associate Manager	Vistage Malaysia Sdn Bhd	+603-22842126	+60123203267	leepeng@vistage.com.my
7	Ranjit	Singh	-	-	-	-	-
8	Yamaha	Yoki	Managing Director	Lily	603-4578098	-	yamaha@yahoo.com
9	-	Nazri	-	-	-	-	-
10	Anthony	Boird	Manager First Class	-	-	-	-
11	Gan	Chin Kiat	Test 3rd time	-	-	0123456879	ckgan@netstermsc.com
12	Kareena	Tan	Executive	Vistage Malaysia Sdn Bhd	603-22842176	60123203267	karena@vistage.com.my
13	Yip	SC	Software Tester	Netster MSC Sdn Bhd	-	+60169342765	scyip@netstermsc.com
14	G	Saravanan	Chief Technology Officer	-	603-91061199	60133832122	g@centumsoft.com

## Opportunity Reports

### - Opportunity Summary Report



### - Opportunity Trend Report

Customer Relationship Management System - Windows Internet Explorer  
 http://www.claritascrm.com/reportviewer.aspx?mode=view&module=Report&record=618A3D83-2921-4351-8760-E2CC4585258

CLARITAS CRM

Opportunity Trend

360 Views: Month | Quarter | Year

		Prospecting		Qualification		Value Proposition		Proposal/Quotation		Negotiation/Review		Closed Won	
		Amount	Total	Amount	Total	Amount	Total	Amount	Total	Amount	Total	Amount	Total
2011	July	1,050,900.00	3	-	0	-	0	-	0	-	0	-	0
	August	10,000.00	1	-	0	-	0	-	0	-	0	1,000,000.00	1
	November	50,000.00	1	100,000.00	1	-	0	662,000.00	3	170,001.00	2	60,000.00	2
	December	-	0	-	0	-	0	-	0	-	0	120,100.00	3
2012	January	0.00	2	-	0	-	0	0.00	3	-	0	-	0
	<b>Total</b>	<b>1,110,900.00</b>	<b>7</b>	<b>100,000.00</b>	<b>1</b>	<b>0.00</b>	<b>0</b>	<b>662,000.00</b>	<b>6</b>	<b>170,001.00</b>	<b>2</b>	<b>1,180,100.00</b>	<b>6</b>

## - Opportunity Detail Report

Customer Relationship Management System - Windows Internet Explorer  
 http://www.claritascrm.com/reportviewer.aspx?mode=view&module=Report&record=C475768A-D24F-470C-A913-8A2A557308BB

CLARITAS CRM

Opportunity Detail Report

No	Date	Name	Customer	Company	Amount	Expected Close Date
1	7/28/2011 12:39:16 AM	Pena Builders - Opportunity #01	WC Ho	Pena Builders Sdn Bhd	50,000.00	7/31/2011 12:00:00 AM
2	7/29/2011 6:55:12 PM	Opp B	-	-	900.00	9/30/2011 12:00:00 AM
3	7/29/2011 6:55:49 PM	Purchase of Hardware Equipment	Aaron Chong	Pena Builders Sdn Bhd	1,000,000.00	7/31/2011 12:00:00 AM
4	8/15/2011 8:19:04 PM	Vistage Malaysia: Test Opportunity	Sherine Cheng	Vistage Malaysia Sdn Bhd	10,000.00	8/16/2011 12:00:00 AM
5	8/26/2011 5:15:24 PM	Purchase of Glenmarie Garden	Nazri	ABC Co Ltd	1,000,000.00	8/31/2011 12:00:00 AM
6	11/2/2011 5:54:50 PM	Centium Opportunity	G Saravanan	Centium Software Sdn Bhd	100,000.00	7/25/2011 12:00:00 AM
7	11/2/2011 5:54:50 PM	Vistage: Opportunity	Lee Peng Chin	Vistage KL Sdn Bhd	10,000.00	8/31/2011 12:00:00 AM
8	11/11/2011 3:36:06 PM	Claritas CRM	Kelvin Leow	Netster MSC Sdn Bhd	50,000.00	11/16/2011 12:00:00 AM
9	11/14/2011 5:20:45 PM	Claritas CRM	-	Netster MSC Sdn Bhd	500,000.00	11/29/2011 12:00:00 AM
10	11/14/2011 5:22:30 PM	Netster CRM	-	Netster MSC Sdn Bhd (Cyberjaya)	100,001.00	11/29/2011 12:00:00 AM

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## Quote Reports

### - Quote Summary Report

Customer Relationship Management System - Windows Internet Explorer  
 http://www.claritascrm.com/reportviewer.aspx?mode=view&module=Report&record=73EC17DB-6384-4629-BD03-96D92A3E11B1

CLARITAS CRM

Quote Summary Report

360 Views: Account | Contact | Team | User | Status

	Draft		Negotiation		Delivered		Grand Total	
	Total	Value	Total	Value	Total	Value	Total	Value
	0		0		1	130.00	1	130.00
ABC Co Ltd	0		4	36,852.45	0		4	36,852.45
Carlsberg Brewery Malaysia Berhad	1	4,630.72	0		0		1	4,630.72
Netster MSC Sdn Bhd	15	69,709.50	2	(5,392.03)	1	27,300.00	18	91,617.47
<b>Total</b>	<b>16</b>	<b>74,340.22</b>	<b>6</b>	<b>31,460.42</b>	<b>2</b>	<b>27,430.00</b>	<b>24</b>	<b>133,230.64</b>

Legend:  
■ Netster MSC Sdn Bhd  
■ ABC Co Ltd  
■ Others

75% (Netster MSC Sdn Bhd)  
 17% (ABC Co Ltd)  
 8% (Others)

Internet | Protected Mode: Off

## - Quote Detail Report

No	Date	Quotation	Title	Customer	Company	Amount	Status
1	12/16/2011 6:16:34 PM	QT20111216-14	Quotation for Claritas CRM Test2	Kelvin Leow	Netster MSC Sdn Bhd	-	Draft
2	12/20/2011 3:32:34 PM	QT20111220-21	Quotation for Claritas CRM	Kelvin Leow	Netster MSC Sdn Bhd	-	Draft
3	10/12/2011 11:31:45 AM	QT20111012-07	Claritas Quotation	Kelvin Leow	Netster MSC Sdn Bhd	-	Draft
4	12/22/2011 4:01:41 PM	QT20111222-27	Quotation on X1r	Sek Tai Chan	Carlsberg Brewery Malaysia Berhad	4,630.72	Draft
5	11/9/2011 4:57:30 PM	QT20111109-08	Claritas CRM Quotation	Brandon Chang	Netster MSC Sdn Bhd	-	Draft
6	12/20/2011 3:29:48 PM	QT20111220-20	Quotation for Claritas CRM	Kelvin Leow	Netster MSC Sdn Bhd	-	Draft
7	7/21/2011 10:39:32 AM	QT20110721-02	Quotation for eCommerce	Ho Joo Tan	Netster MSC Sdn Bhd	(5,392.03)	Negotiation
8	1/9/2012 3:05:49 PM	QT20120109-28	Quotation A	-	ABC Co Ltd	4,734.45	Negotiation
9	12/16/2011 6:19:49 PM	QT20111216-15	Quotation for Claritas CRM Test3	Kelvin Leow	Netster MSC Sdn Bhd	-	Draft
10	8/11/2011 10:35:03 AM	QT20110811-05	CRM Quotation	Brandon Chang	Netster MSC Sdn Bhd	27,300.00	Delivered

## Activity Reports

### - Activity Summary Report

360 Views: Module | Team | User

#### Call Summary

	Planned	Held	Not Held	Total
Carlsberg Brewery Malaysia Berhad	0	1	0	1
Centium Software Sdn Bhd	0	2	0	2
Company Test	1	0	0	1
CRD20110630-101	1	0	0	1
Gan Chin Kiat	1	0	0	1
Kelvin Leow	0	1	0	1
Netster CRM Basic Edition	1	0	0	1
Purchase Of Other Equipments	0	1	0	1
Tester Branch	1	0	0	1
testingCRD20110811-118	1	0	0	1
天天	1	0	0	1
<b>Total</b>	<b>7</b>	<b>5</b>	<b>0</b>	<b>12</b>

#### Meeting Summary

- Call Detail Report

No	Date	Subject	Duration	Status	Assigned To	Related To
1	10/15/2011 12:00:00 AM	asd	0 Days 0 Hours 0 Minutes	Planned	Gan Chin Kiat	Gan Chin Kiat
2	7/1/2011 8:00:00 PM	Account Call	0 Days 0 Hours 0 Minutes	Planned	Kenix Yip	Company Test
3	6/21/2011 12:00:00 AM	utfgtrrr	0 Days 0 Hours 0 Minutes	Held	Kelvin Leow	Carlsberg Brewery Malaysia Berhad
4	8/10/2011 12:00:00 AM	sth	0 Days 0 Hours 0 Minutes	Planned	Kenix Yip	天天
5	8/3/2011 12:00:00 AM	Centium Call	1 Days 0 Hours 0 Minutes	Held	Kelvin Leow	Centium Software Sdn Bhd
6	3/28/2011 12:00:00 AM	Discussion on feasibility	0 Days 1 Hours 0 Minutes	Planned	Kelvin Leow	CRD20110630-101
7	8/30/2011 11:00:00 AM	Centium Call2	0 Days 2 Hours 0 Minutes	Held	Kelvin Leow	Kelvin Leow
8	8/12/2011 12:00:00 AM	new call	0 Days 0 Hours 0 Minutes	Planned	Kenix Yip	testingCRD20110811-118
9	11/17/2011 2:00:00 PM	New Call	0 Days 0 Hours 0 Minutes	Planned	Kenix Yip	Netster CRM Basic Edition
10	12/20/2011 12:00:00 AM	First follow up	0 Days 0 Hours 0 Minutes	Held	Brandon Chang	Purchase Of Other Equipments
11	7/6/2011 11:00:00 AM	Branch Call	0 Days 0 Hours 0 Minutes	Planned	Kenix Yip	Tester Branch
12	8/24/2011 12:00:00 AM	Centium Call5	0 Days 0 Hours 0 Minutes	Held	Brandon Chang	Centium Software Sdn Bhd

- Meeting Detail Report

No	Date	Subject	Duration	Status	Assigned To	Related To
1	12/14/2011 12:00:00 AM	1st Follow Up	Days 1 Hours 0 Minutes	Planned	Kelvin Leow	ABC Co Ltd : Buy Product111
2	10/20/2011 12:00:00 AM	a	0 Days 0 Hours 0 Minutes	Planned	Kelvin Leow	Gan Chin Kiat
3	6/30/2011 12:00:00 AM	CRD20110630-101 Discussion	1 Days 0 Hours 0 Minutes	Held	Kelvin Leow	CRD20110630-101
4	7/6/2011 10:00:00 AM	Branch Meeting	0 Days 0 Hours 0 Minutes	Held	Kenix Yip	Netster CRM
5	8/10/2011 12:00:00 AM	CRM Meeting	0 Days 0 Hours 0 Minutes	Planned	Kenix Yip	Netster MSC Sdn Bhd
6	6/29/2011 12:00:00 AM	Meeting Test	0 Days 0 Hours 0 Minutes	Not Held	Kenix Yip	Company Test
7	12/30/2011 12:00:00 AM	Negotiation Meeting	0 Days 0 Hours 0 Minutes	Planned	Brandon Chang	Purchase Of Other Equipments
8	6/30/2011 11:00:00 AM	Case Meeting	0 Days 0 Hours 0 Minutes	Planned	Kenix Yip	CRD20110627-72
9	6/16/2011 12:00:00 AM	Director's Meeting	0 Days 1 Hours 0 Minutes	Planned	Kelvin Leow	Kelvin Leow
10	6/29/2011 9:00:00 AM	Company Test Meeting	0 Days 0 Hours 0 Minutes	Held	Kenix Yip	Company Test

## - Task Detail Report

No	Date	Subject	Priority	Due Date	Status	Assigned To	Related To
1	8/11/2011 12:00:00 AM	sth	High	8/11/2011 1:32:00 PM	Planned	Kenix Yip	天天
2	7/1/2011 12:00:00 AM	User task	High		Held	Kenix Yip	Kenix Yip
3	6/30/2011 1:00:00 PM	Case Task	High	7/29/2011 6:00:00 PM	Planned	Kenix Yip	Kenix Yip
4	6/28/2011 12:00:00 AM	Testing Task	High		Planned	Kenix Yip	CRD20110627-71
5	6/22/2011 12:00:00 AM	Do documentation for Carlsberg	High	6/30/2011 12:00:00 AM	Planned	Kelvin Leow	Carlsberg Brewery Malaysia Berhad
6	6/30/2011 11:00:00 AM	Product Task	High		Planned	Kenix Yip	Kenix Yip
7	8/31/2011 12:00:00 AM	Centium Task2	Medium	8/3/2011 7:00:00 PM	Planned	Kelvin Leow	Centium Software Sdn Bhd
8	7/7/2011 12:00:00 PM	Account Task	Medium	7/6/2011 4:31:00 PM	Planned	Kenix Yip	Company Test
9	6/30/2011 2:00:00 PM	Branch Task	Medium	6/29/2011 12:00:00 AM	Planned	Kelvin Leow	CRD20110630-101
10	10/12/2011 12:00:00 AM	test	High	10/14/2011 9:37:00 AM	Not Held	FTSB Hadi	ABC Co Ltd
11	7/8/2011 9:00:00 AM	Contact Task	High	7/6/2011 1:26:00 PM	Held	Kenix Yip	CRD20110627-70
12	7/8/2011 12:00:00 PM	Kenny Task	High	7/6/2011 11:51:00 AM	Not Held	Kenix Yip	Kenny Yip
13	7/7/2011 12:00:00 PM	Branch Task	High	7/6/2011 10:49:00 AM	Held	Kenix Yip	Tester Branch

## User Report

### - User Detail Report

No	User Name	First Name	Last Name	Role	Active	Allow	Mobile	Email
<b>Administrator</b>								
1	FTSB\yflim	Owen	Lim	Administrator	Active	True	-	yflim@netstermsc.com
2	mobweb\tywong	Thong Yng	Wong	Administrator	Active	True	-	tywong@mobweb.com.my
3	ftsb\yazlan	Mohd	Razlan	Administrator	Active	True	-	razlan@netstermsc.com
4	nandos\twlim	TW	Lim	Administrator	Active	False	-	twlim@nandos.com.my
5	FTSB\Hackett	FTSB	Hackett	Administrator	Active	True	-	-
6	x1r\lily	Lily	Ma	Administrator	Active	True	-	lily@x1r.com.my
7	Test 1	-	asd	Administrator	Active	True	-	-
8	nandos\ramlan	-	Ramlan	Administrator	Active	False	-	ramlan@nandos.com.my
9	mdec\mohdyazid	Mohd	Yazid	Administrator	Active	True	-	mohdyazid@mdec.com.my
10	venusys\daryl	Daryl	Lim	Administrator	Active	False	-	darryldrazen@gmail.com