



- Pioneering CRM Innovation -

CRM for Retail & Distributions Product Demo & Screenshots



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1 CRM: Master Data

1.1 User & Role Management

CLARITAS CRM Feedback Management System

Welcome FTSB\kleow Help Logout

Home General Support Collaboration Report Admin Help

User Maintenance > Brandon Chang

Save Cancel Save and Next

User Profile

User Name: ftsb/bcchang
 Salutation: Mr
 First Name: Brandon
 Last Name: Chang
 Change Password:

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

Reporting To:
 Employment Since: 01/01/2008
 Employment Tenure: 3 Year(s) 6 Month(s)

Correspondence Address

Home
 Address 1:
 Address 2:
 Address 3:
 City:
 Postcode:
 State:

Business
 Address 1:
 Address 2:
 Address 3:
 City:
 Postcode:
 State:

CLARITAS CRM Feedback Management System

Welcome FTSB\kleow Help Logout

Home General Support Collaboration Report Admin Help

Role Maintenance > Administrator

Edit Cancel

Role Info

Role Name: Administrator

Role Management

	Access	Delete	Edit	List	View
Account	Enable	All	All	All	All
Branch	Enable	All	All	All	All
Call	Enable	All	All	All	All
Case	Enable	All	All	All	All
Contact	Enable	All	All	All	All
Contract	Enable	All	All	All	All
Inbound Email	Enable	All	N/A	All	All
Issue	Enable	All	All	All	All
Knowledge Base	Enable	All	All	All	All
Meeting	Enable	All	All	All	All
Note	Enable	All	All	All	All
Product	Enable	All	All	All	All
Product Catalog	Enable	All	All	All	All
Report	Enable	All	All	All	All
Task	Enable	All	All	All	All
User	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 Outlet Management

The screenshot displays the 'Account Management' page for 'Netster MSC Sdn Bhd'. The interface includes a navigation menu with options like Home, General, Support, Collaboration, Report, Admin, and Help. The account details are as follows:

Account Details	
Company	Netster MSC Sdn Bhd
Alternative Name	网特科技有限公司
Industry	Technology
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		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
Netster Head Office	Selangor	Malaysia	+603-78054185	+603-78054184	http://www.netstermsc.com	Ret
Netster R&D Centre	Selangor	Malaysia	+603-78054186	+603-78054184	http://www.netstermsc.com	Ret
Netster Support Centre	Kuala Lumpur	Malaysia	+603-78054185	+603-78054184	http://www.netstermsc.com	Ret

The screenshot displays the 'Branch Management' page for 'Netster Head Office'. The interface includes a navigation menu with options like Home, General, Support, Collaboration, Report, Admin, and Help. The branch details are as follows:

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

1.3 Contact Management

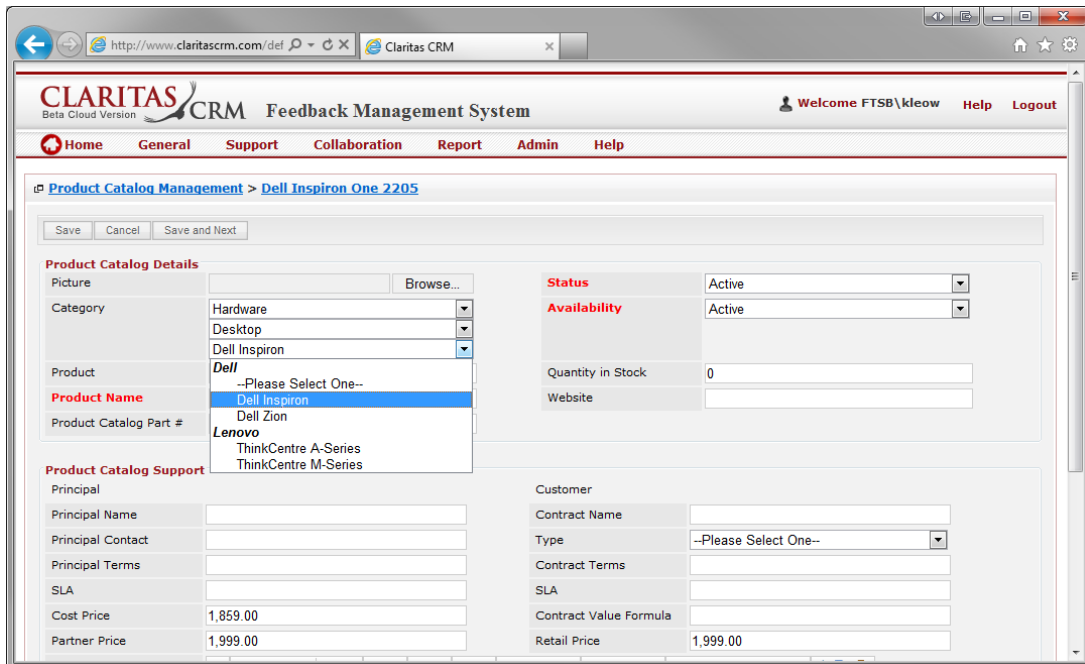
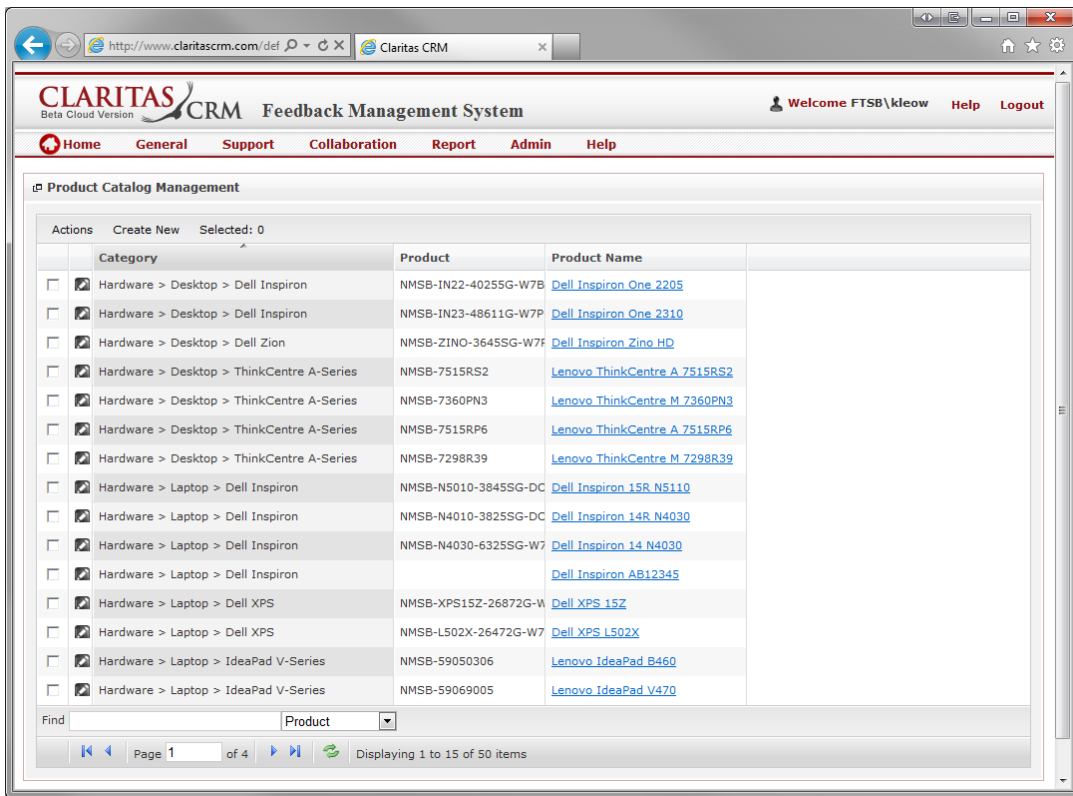
The screenshot shows a web browser window displaying the CLARITAS CRM Feedback Management System. The browser address bar shows the URL <http://www.claritascrm.com/def>. The page header includes the CLARITAS logo, the text "Beta Cloud Version CRM Feedback Management System", and a user greeting "Welcome 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 form with the following 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), "Note" (a rich text editor with a toolbar), "NRIC", and "Gender" (dropdown menu).

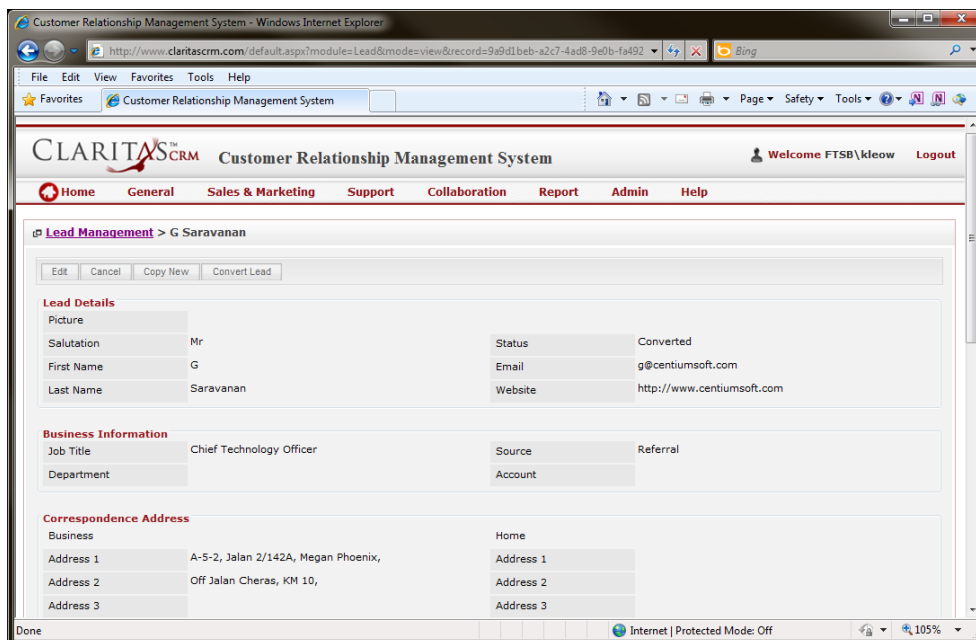
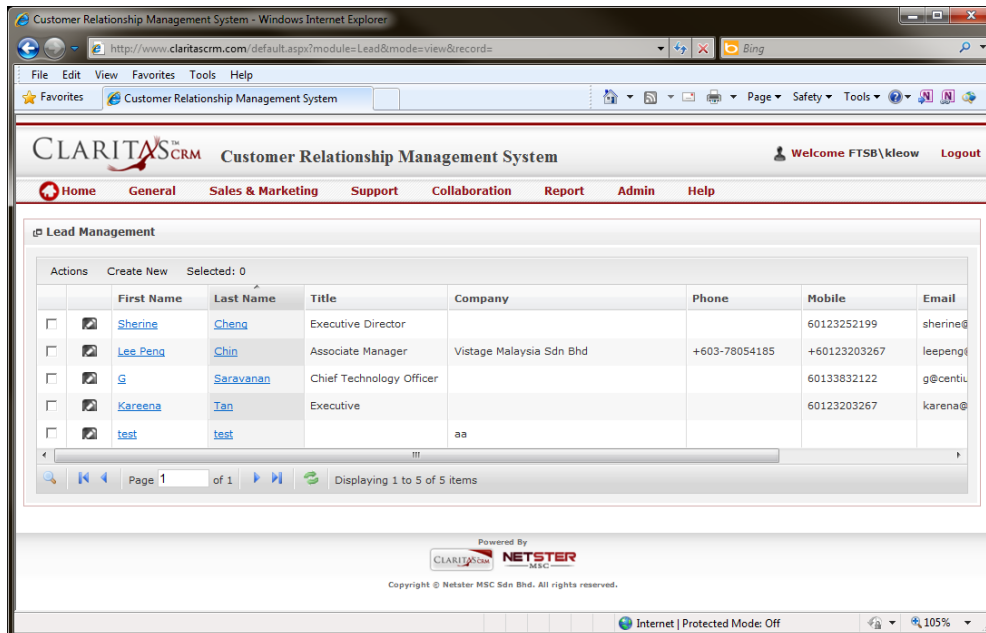
At the bottom of the form, there are "Save" and "Cancel" buttons.

1.4 Product Catalog Management

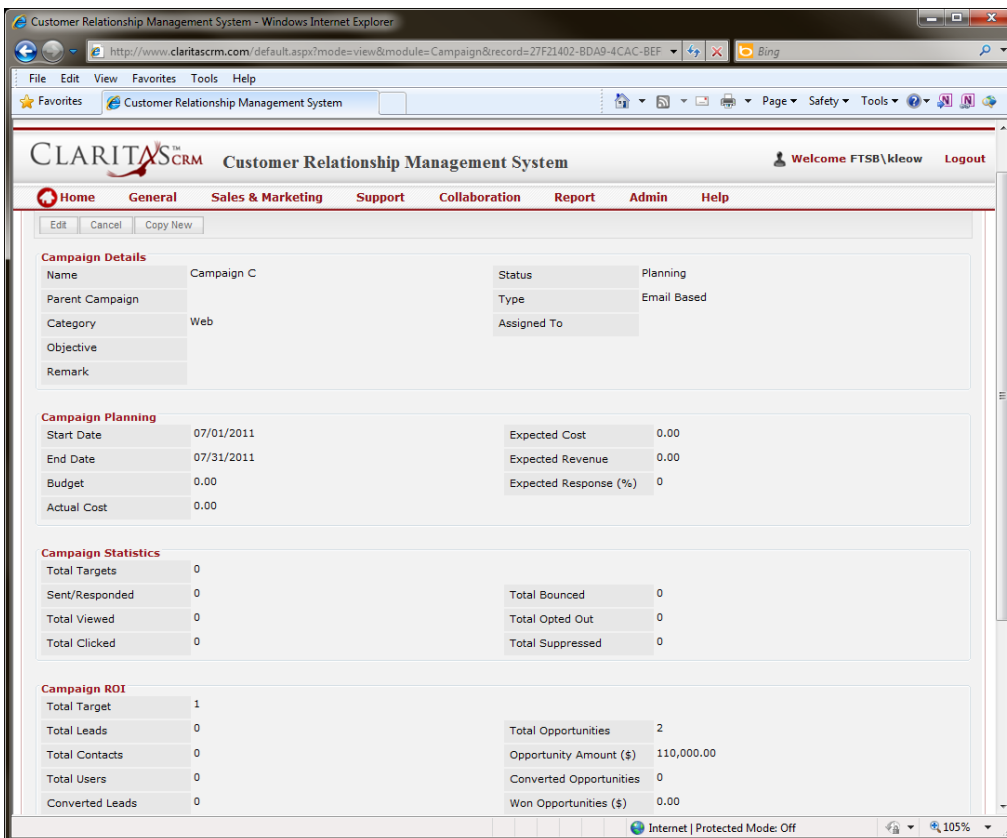
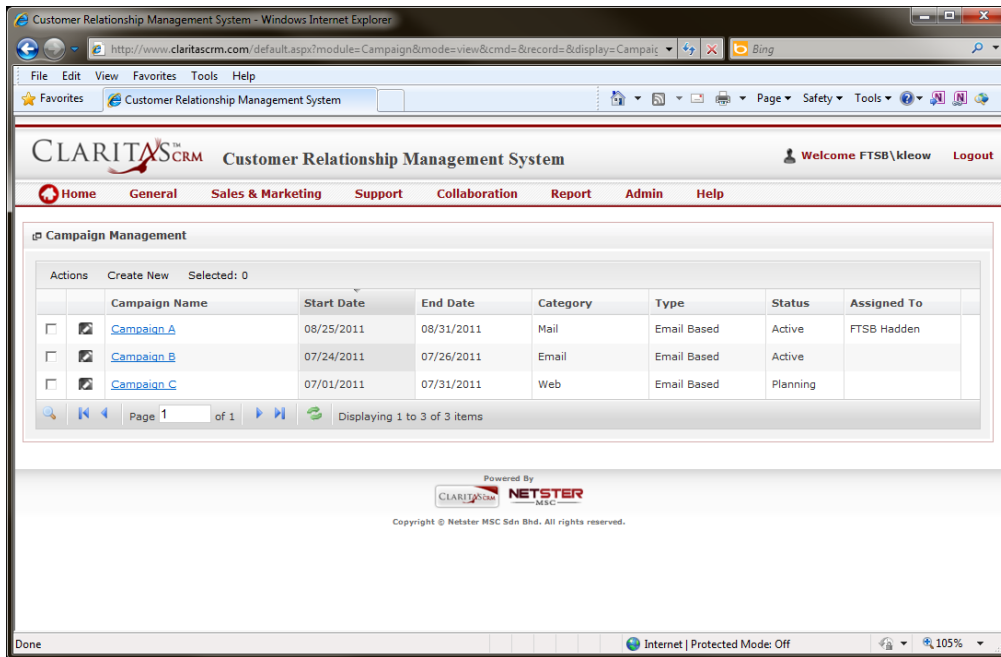


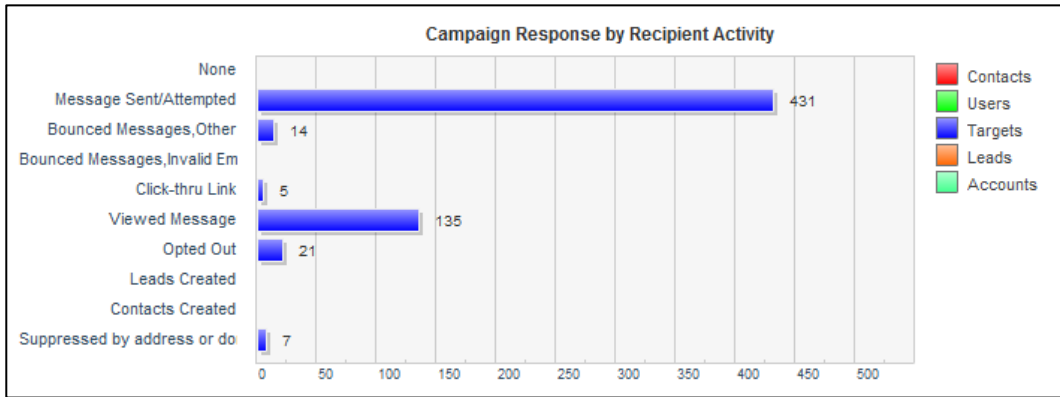
2 CRM: Sales & Marketing

2.1 Lead Management



2.2 Campaign Management

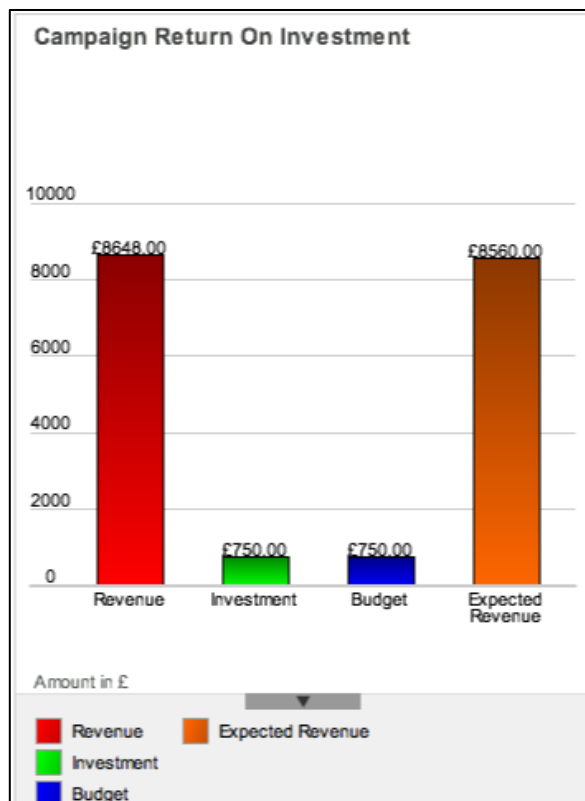




Message Queue (1 - 2 of 2)

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 Sales 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	Status	Negotiation
Title	Quotation for eCommerce	Payment Terms	Net 14 Days
Account	Netster MSC Sdn Bhd	Assigned To	Kelvin Leow
Contact	Robert Chong	Reference Number 1	
Opportunity		Quote Discount (\$)	100.00
Quotation Date	08/30/2011	Quote Tax (\$)	250.00
Valid Until	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

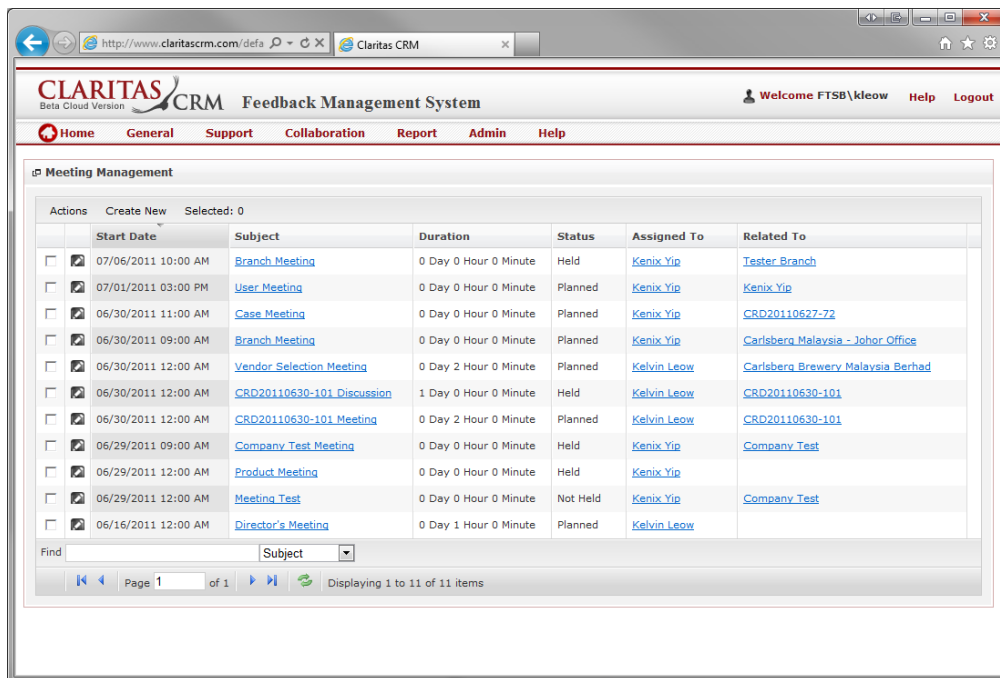
Order	Product Name	Quantity	Cost Price	Unit Price	Discount (\$)	Tax (\$)	Total Price	Delete
0	Product B	1	0.00	10.00	0.00	0.00	10.00	Dele
0	Netster CRM Professional Edition	1	0.00	20,000.00	0.00	0.00	20,000.00	Dele
0	Product A	1	0.00	200.00	0.00	0.00	200.00	Dele

Page 1 of 1 Displaying 1 to 3 of 3 items

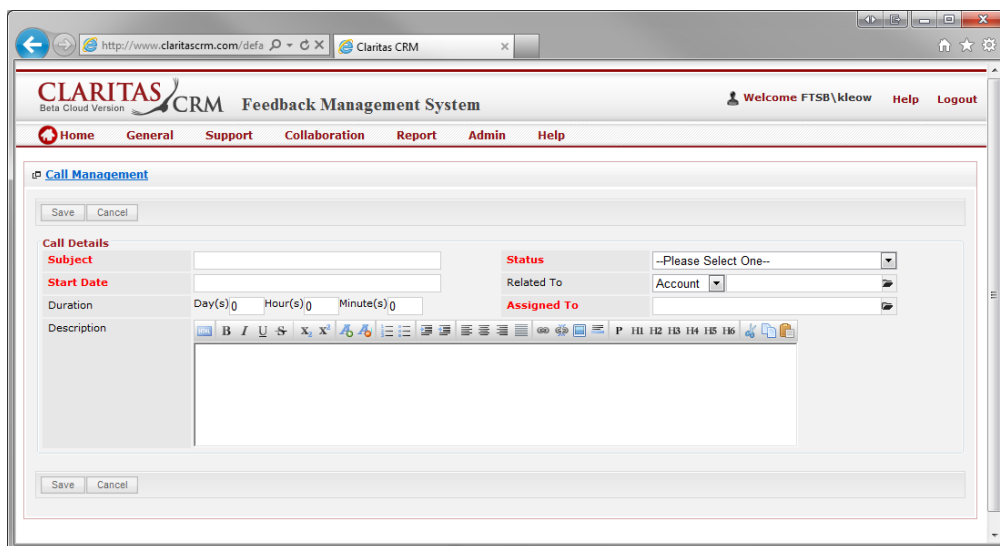
Done Internet | Protected Mode: Off 105%

3 CRM: Collaborations

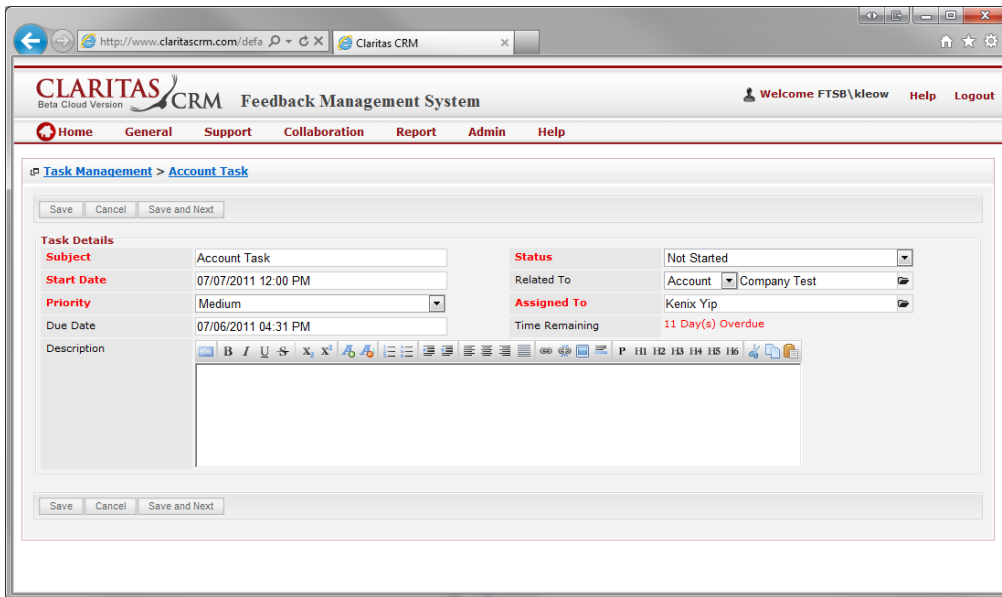
3.1 Scheduling a Meeting



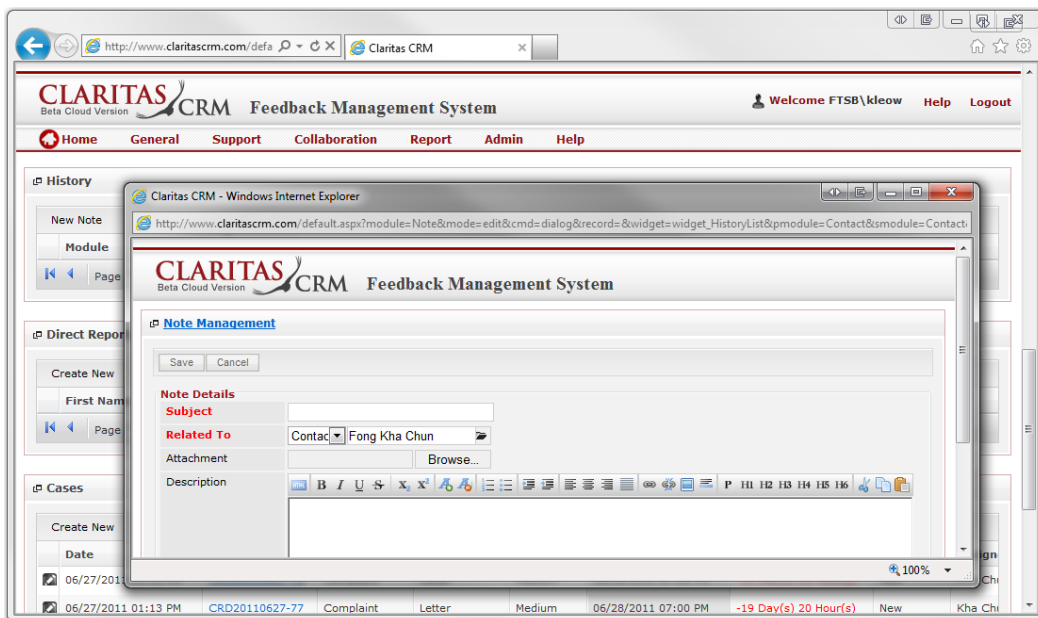
3.2 Planning a Call



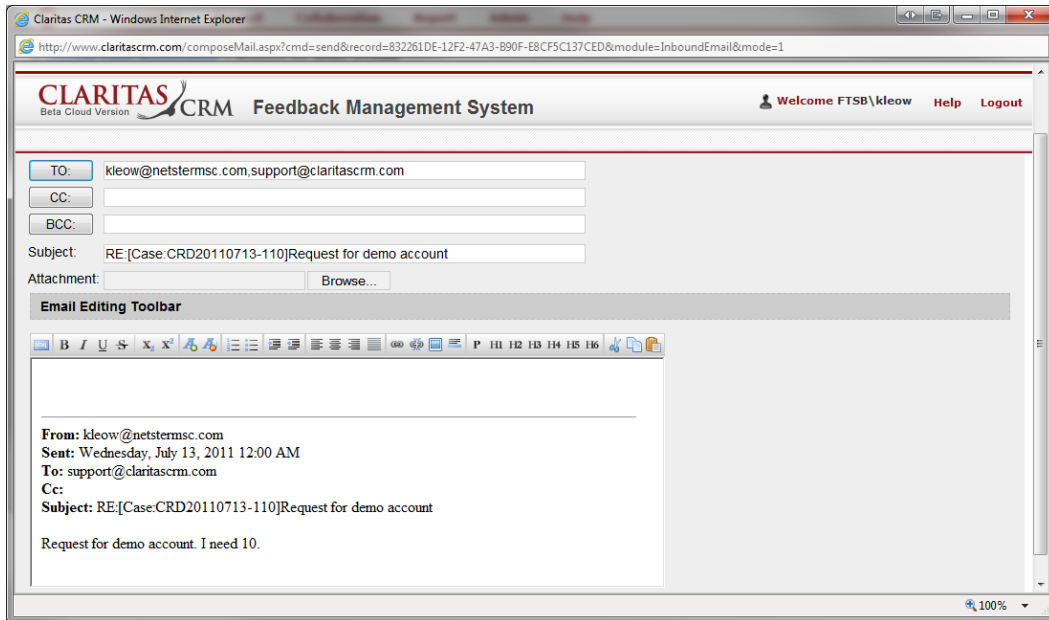
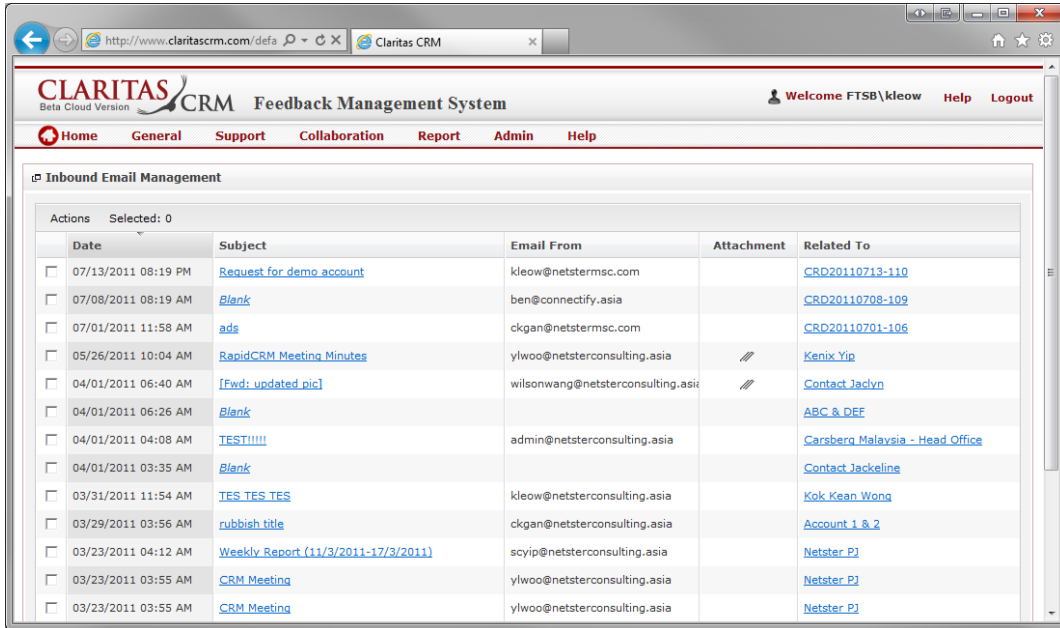
3.3 Creating a Task



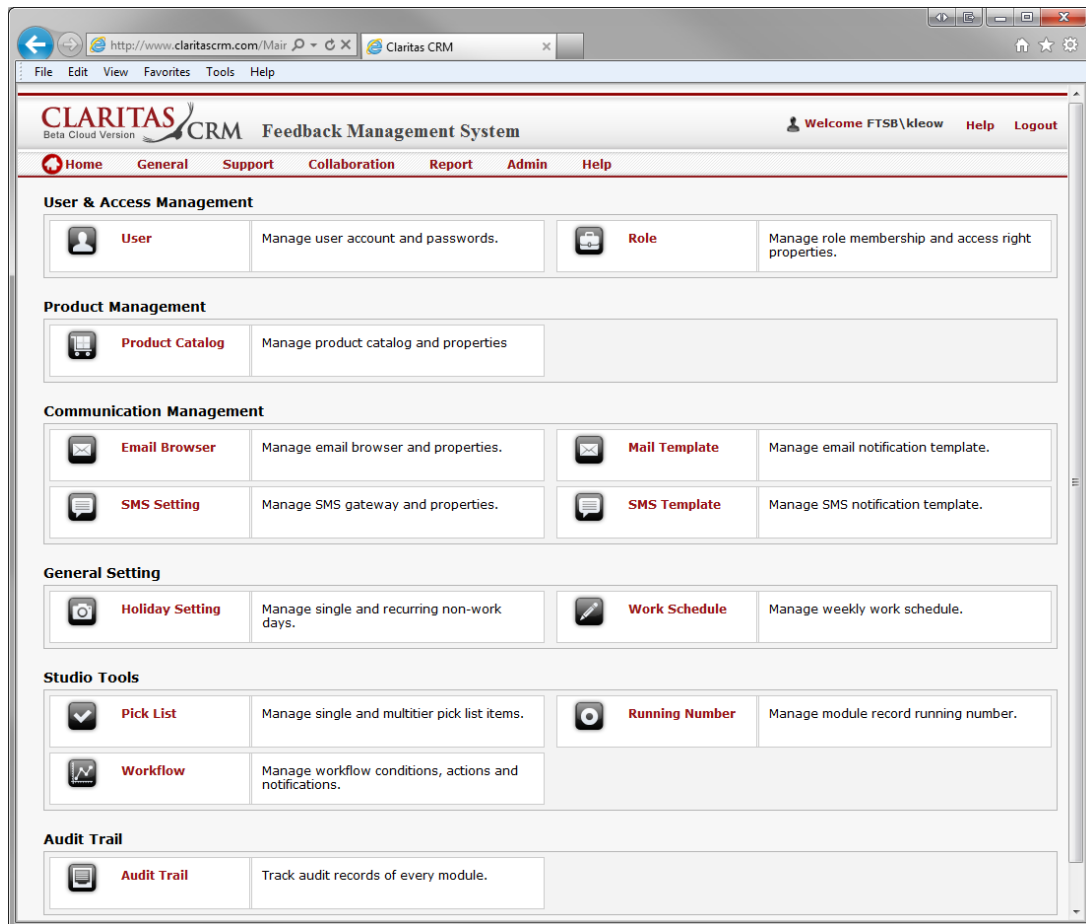
3.4 Associating a Note / Attachment



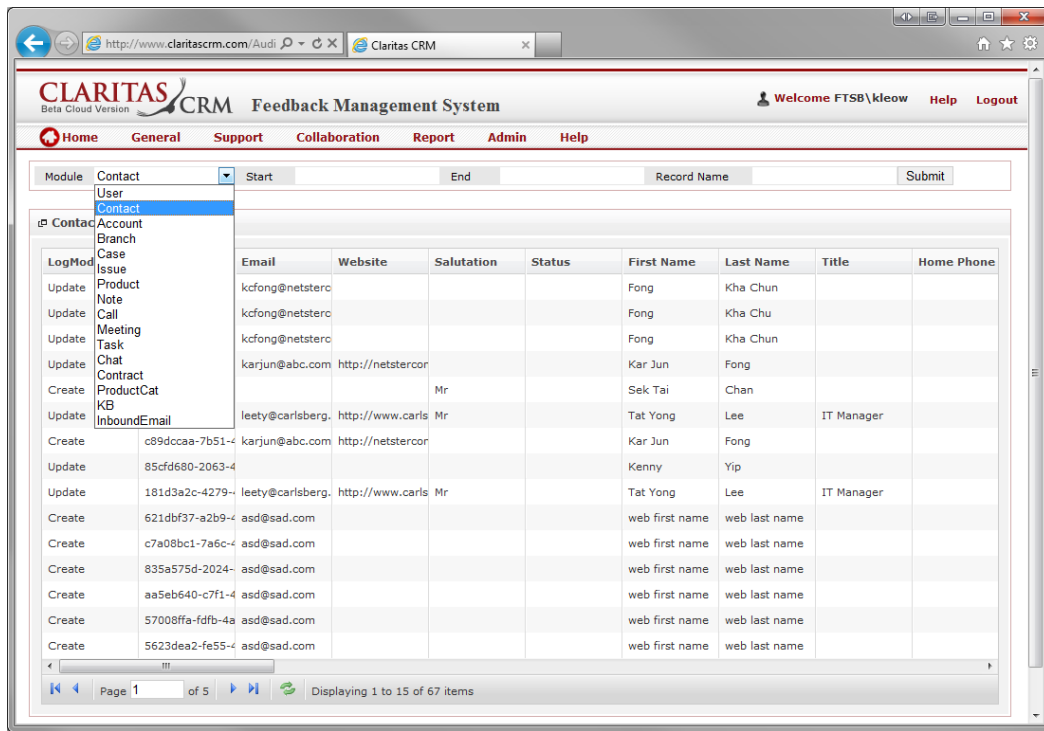
3.5 Email Management



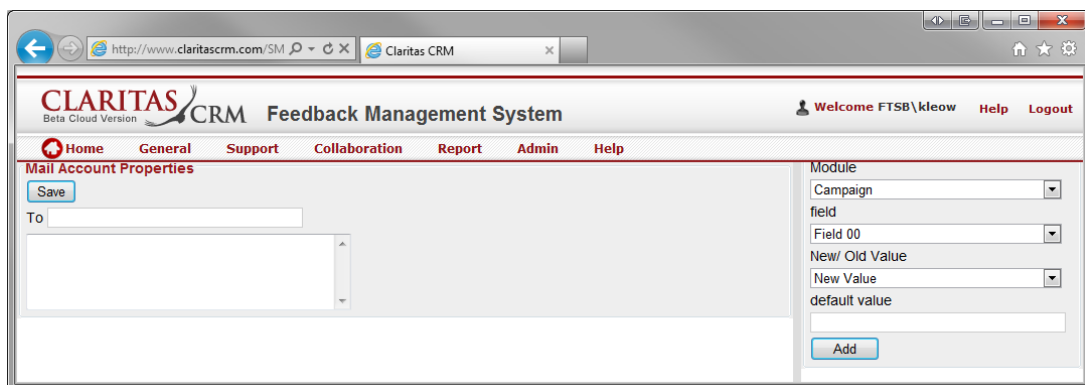
4 CRM: Administration



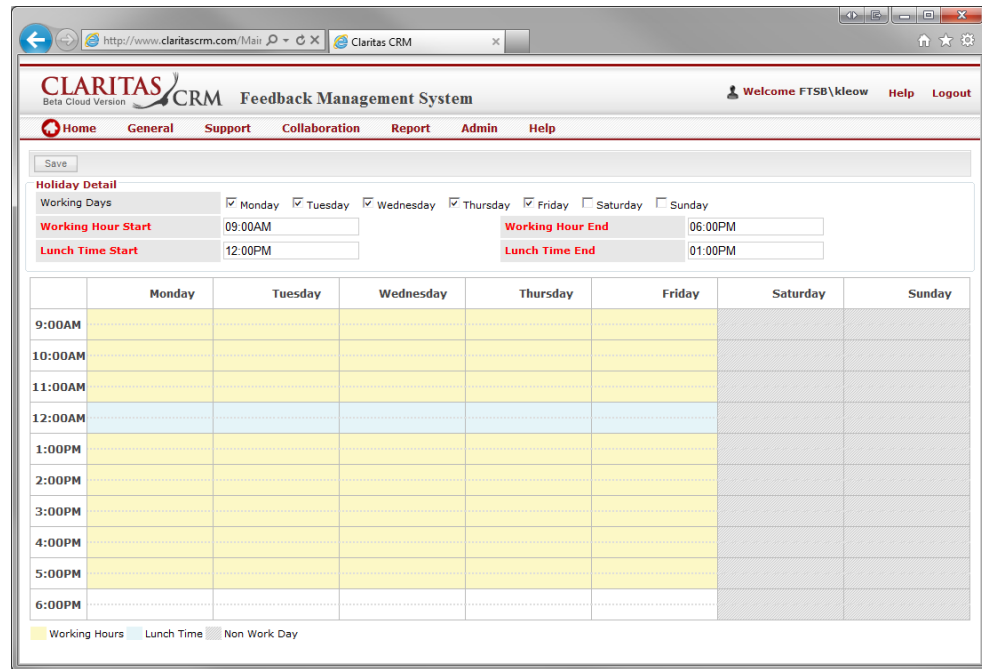
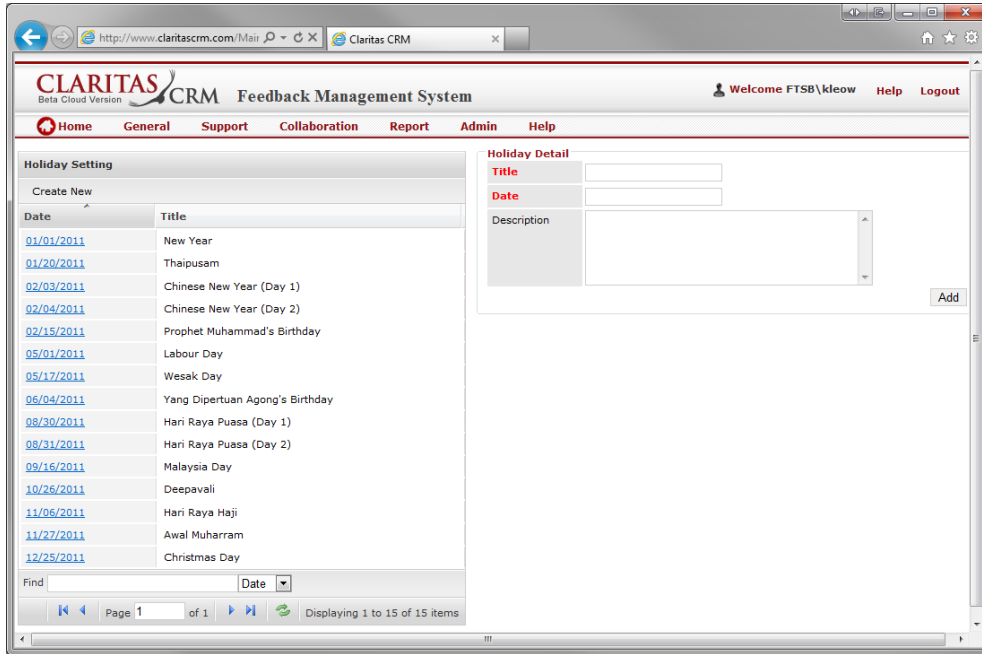
4.1 Audit Trail



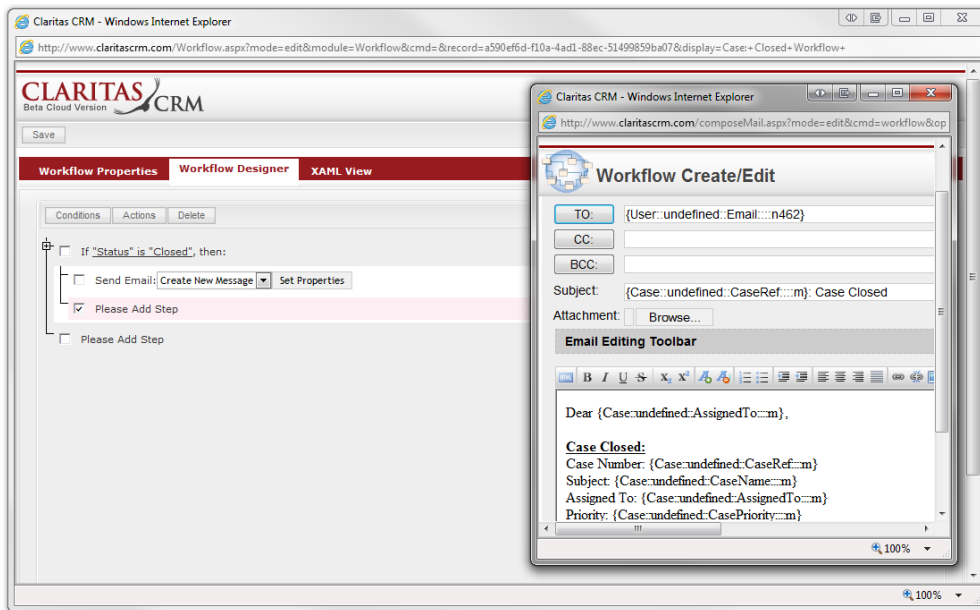
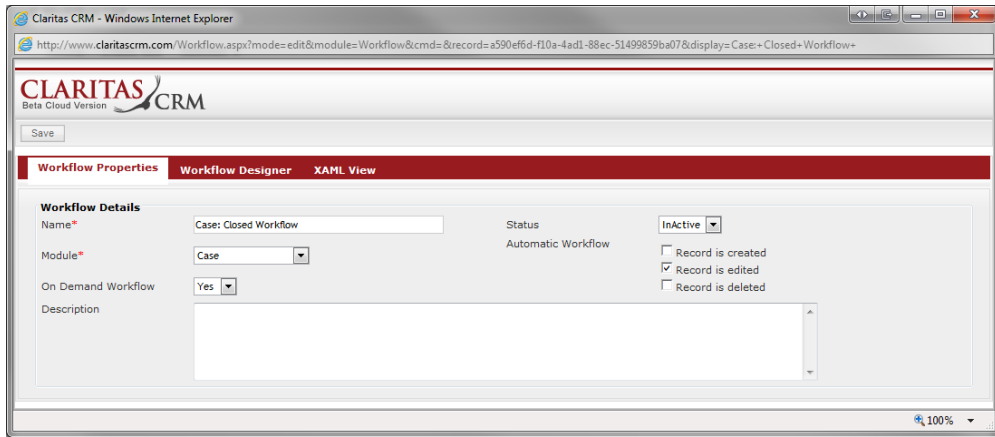
4.2 Communication Management (Email & SMS Template)



4.3 Holidays Setting & Work Schedule



4.4 Workflow Management



4.5 Studio Tools – Pick list & Running Number

Pick List Maintenance

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

Find: Name Page 1 of 3 Displaying 1 to 15 of 40 items

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](#) Save

Running Number Maintenance

Field Name	Module
Purchase	Product
Issue	Issue
Contract	Contract
Case	Case

Page 1 of 1 Displaying 1 to 12 of 12 items

Running Number Detail

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

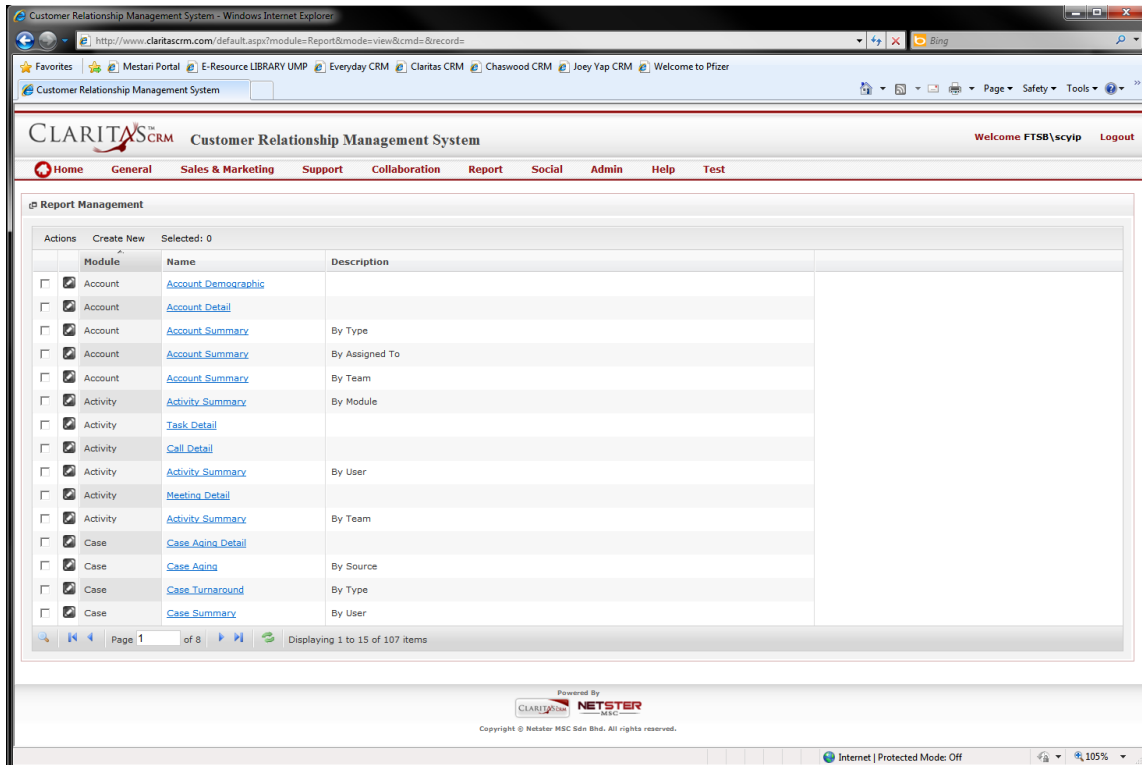
Example:
{6%1} -- 000002
{3%1} -- 003

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

Save

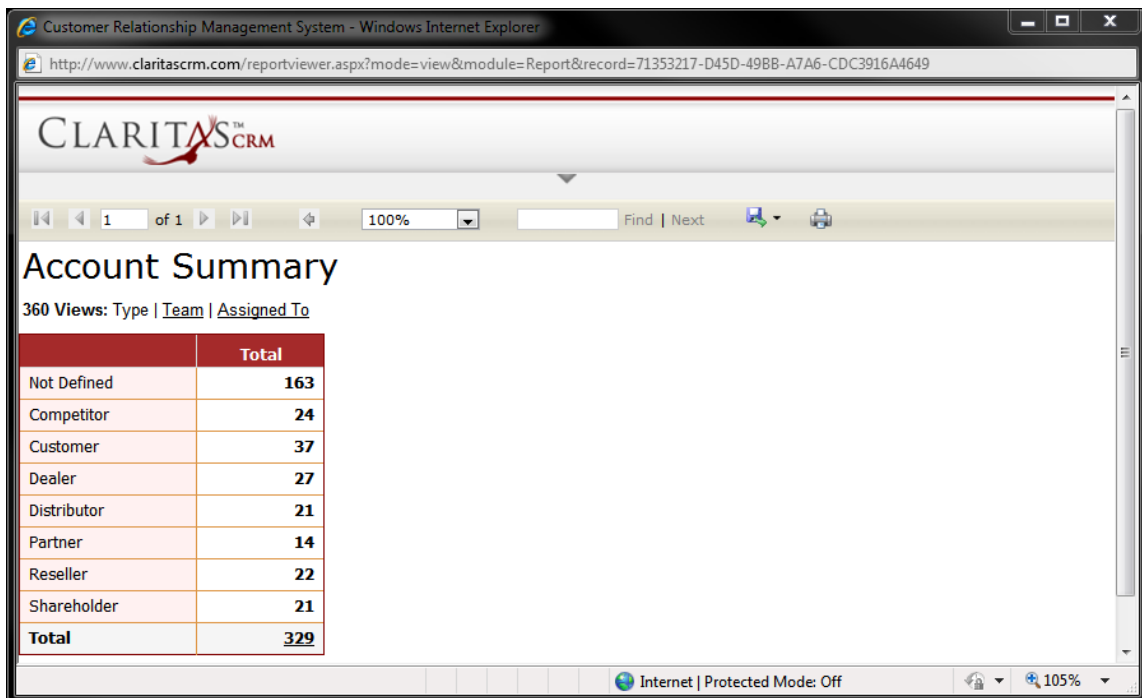
5 CRM: Reporting (Sample Reports)

Report Listing

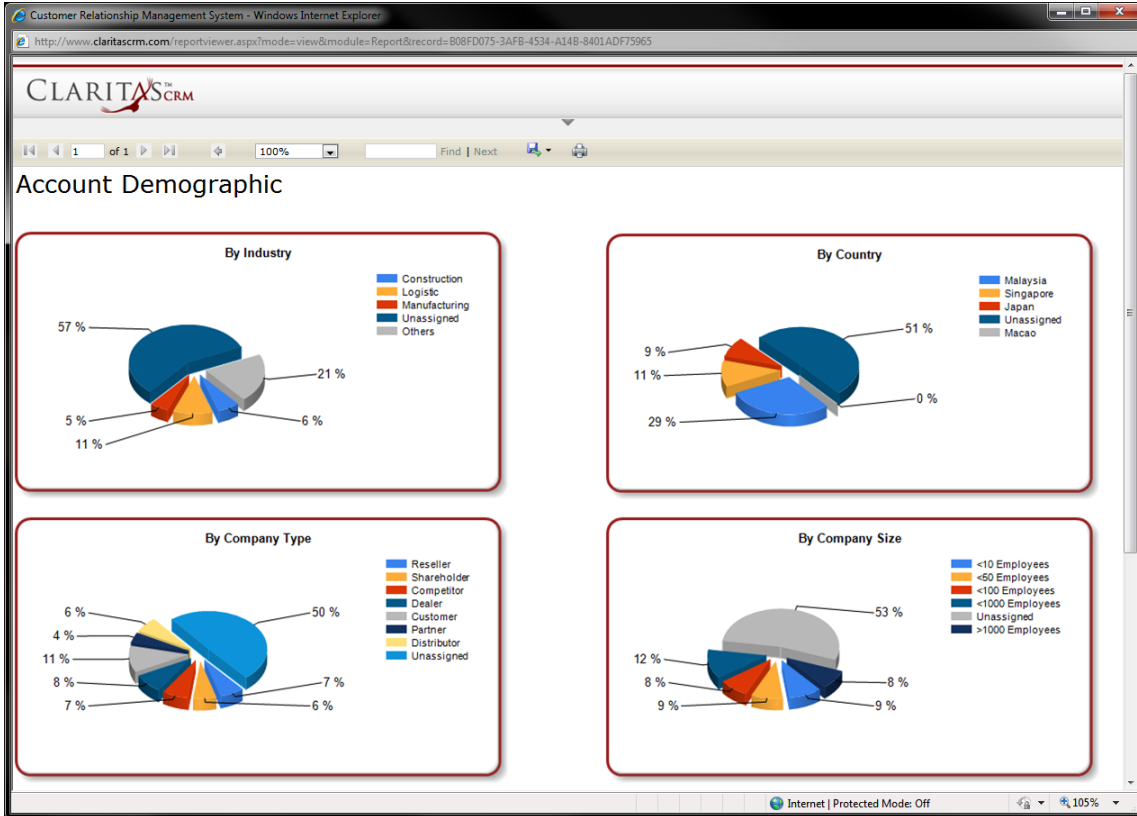


Account Reports

- Account Summary Report



- Account Demographic Report



- Account Detail Report

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	-	-

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

CLARITASTM 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
Total	46

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

CLARITASTM CRM

1 of 1 100% Find | Next

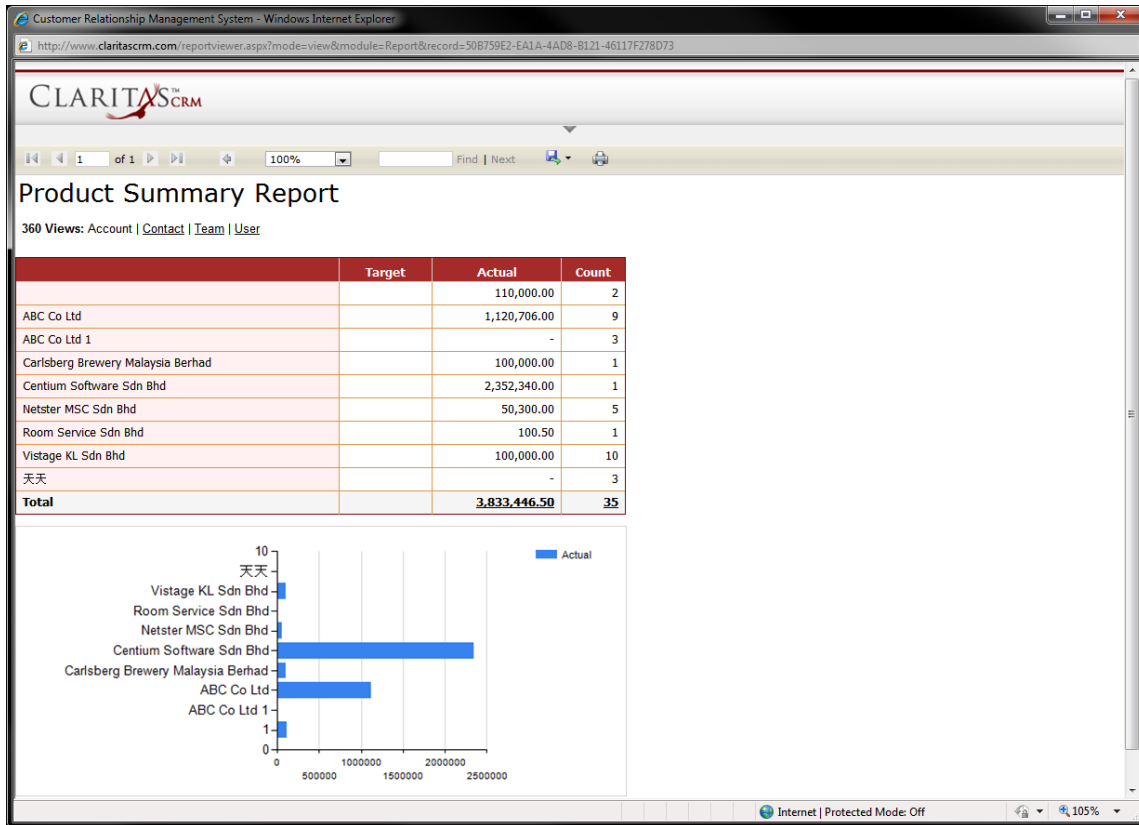
Contact Detail Report

No	First Name	Last Name	Title	Company	Phone	Mobile	Email
ABC Co Ltd							
1	-	Big Momma	-	ABC Co Ltd	-	-	-
2	-	Nazri	-	ABC Co Ltd	-	-	-
3	-	Zamberi	-	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	ckganAnetstermsc.com	-	ABC Co Ltd	-	-	ckgan@netstermsc.com
7	Johnny	Wong	-	ABC Co Ltd	-	-	johnndoe@email.com
ABC Co Ltd 1							
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

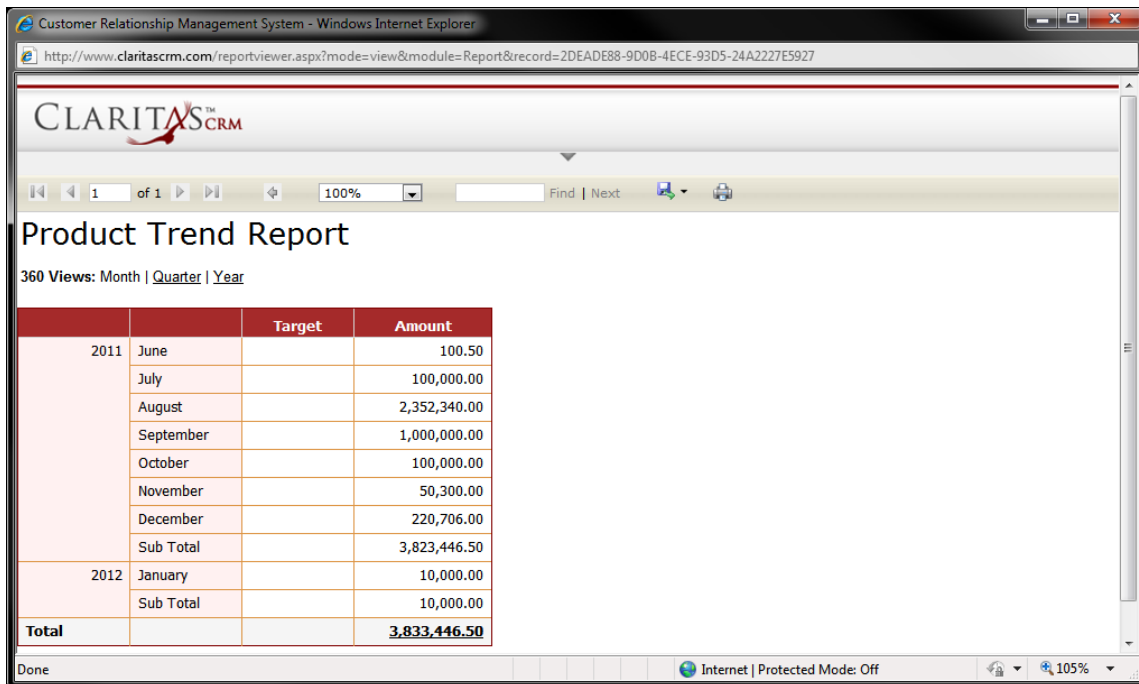
Done Internet | Protected Mode: Off 105%

Product Reports

- Product Summary Report



- Product Trend Report



- Product Detail Report

Customer Relationship Management System - Windows Internet Explorer
<http://www.claritascrm.com/reportviewer.aspx?mode=view&module=Report&record=21C526F1-887F-433A-B7BC-D06DDEC5D207>

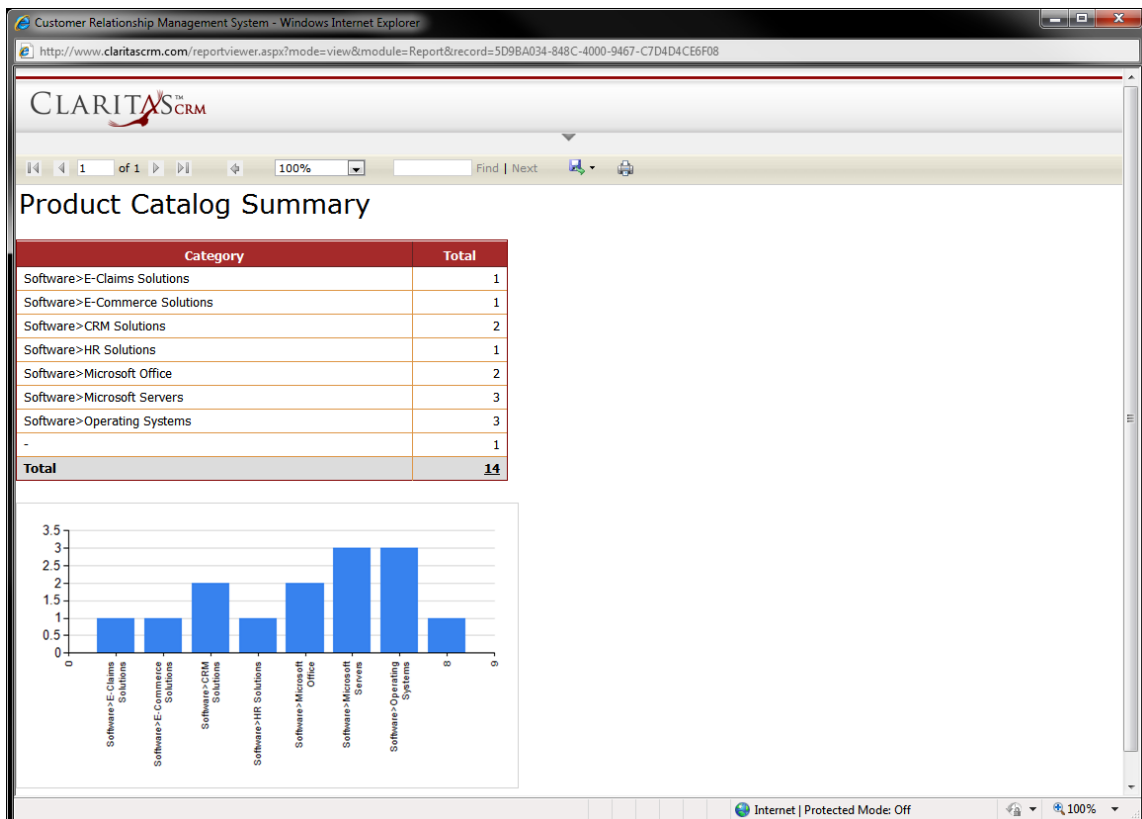
CLARITAS™ CRM

Product Detail Report

No	Date	Product	Name	Customer	Company	Amount	Status
1	12/23/2011 3:52:17 PM	PROD20110628-03	NMS8-751SRS2	G Saravanan	天天		Active
2	12/20/2011 7:51:30 PM	PROD20111220-30	ljashdksjahkdjhkas	-	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 P56000	-	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 Zion							
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-751SRP6	Lenovo ThinkCentre A 751SRP6	Active	-	1,910.00	2,059.00
6	06/13/2011 09:06 AM	NMSB-751RS2	Lenovo ThinkCentre A 751RS2	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](#)

Account	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
Total	12	22,199.00

- 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	-	

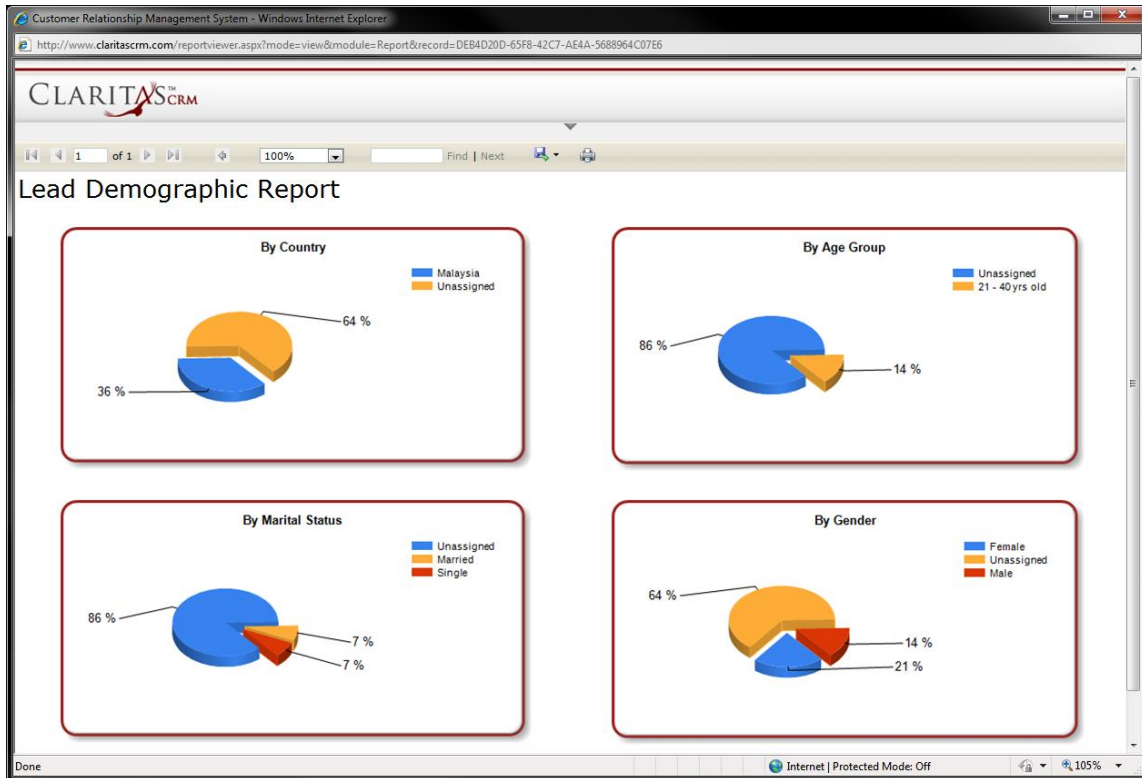
Lead Reports

- 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
Total	1	6	6	1	14

- Lead Demographic Report

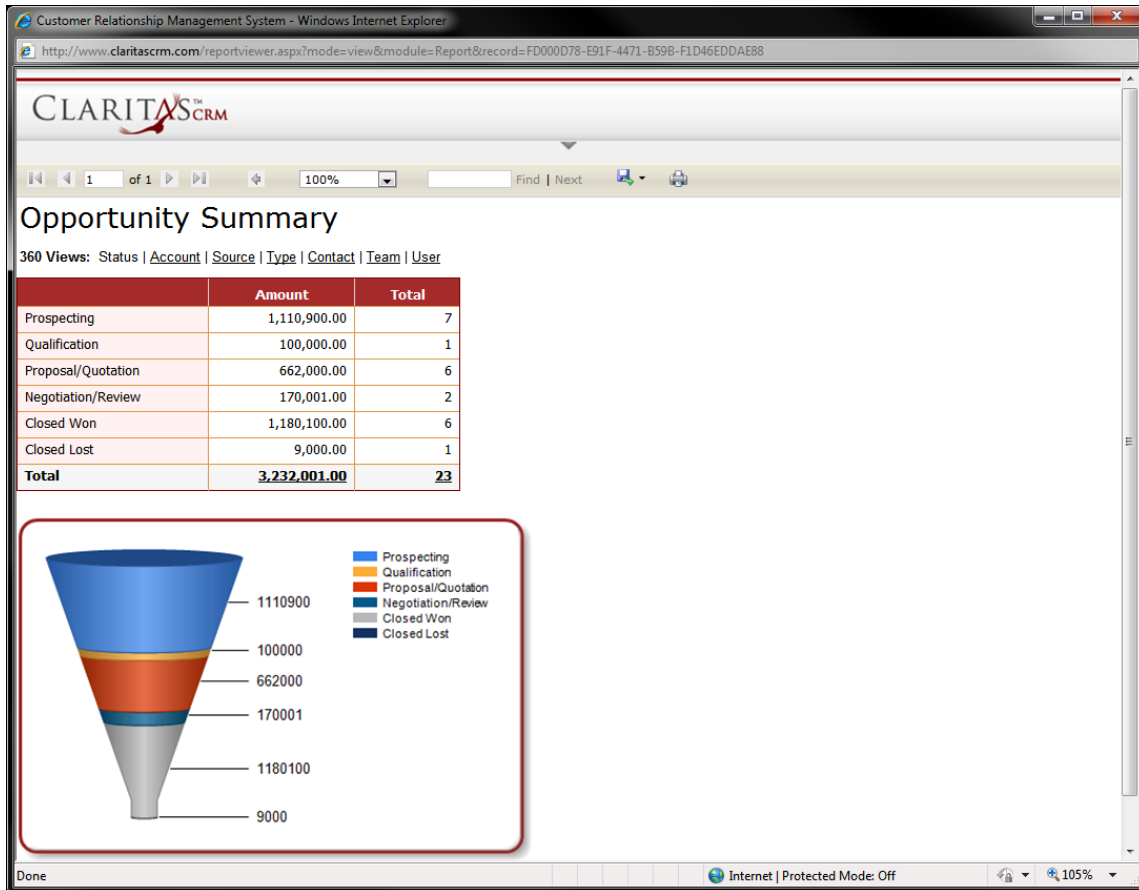


- Lead Detail Report

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	hjtan@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

Sales Reports

- Sales Summary Report



- Sales Trend Report

Customer Relationship Management System - Windows Internet Explorer
 http://www.claritascrm.com/reportviewer.aspx?mode=view&module=Report&record=618A3083-2921-4351-8760-E2CCC4585258

CLARITASSM CRM

1 of 1 100% Find | Next

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
	Total	1,110,900.00	7	100,000.00	1	0.00	0	662,000.00	6	170,001.00	2	1,180,100.00	6

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- Sales Detail Report

Customer Relationship Management System - Windows Internet Explorer
 http://www.claritascrm.com/reportviewer.aspx?mode=view&module=Report&record=C475768A-D24F-470C-A913-8A2A55730888

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

Internet | Protected Mode: Off

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-BD03-98D92A3E11B1

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
Total	16	74,340.22	6	31,460.42	2	27,430.00	24	133,230.64

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
Total	7	5	0	12

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

Customer Relationship Management System - Windows Internet Explorer
 http://www.claritascrm.com/reportviewer.aspx?mode=view&module=Report&record=37380710-3DB3-44C2-911A-17CAF98E0555

CLARITASTM CRM

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 12:00:00 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

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User Report

- User Detail Report

Customer Relationship Management System - Windows Internet Explorer
 http://www.claritascrm.com/reportviewer.aspx?mode=view&module=Report&record=AFC43006-DC71-4DBF-A8F8-590FA07E8314

CLARITASTM CRM

User Detail Report

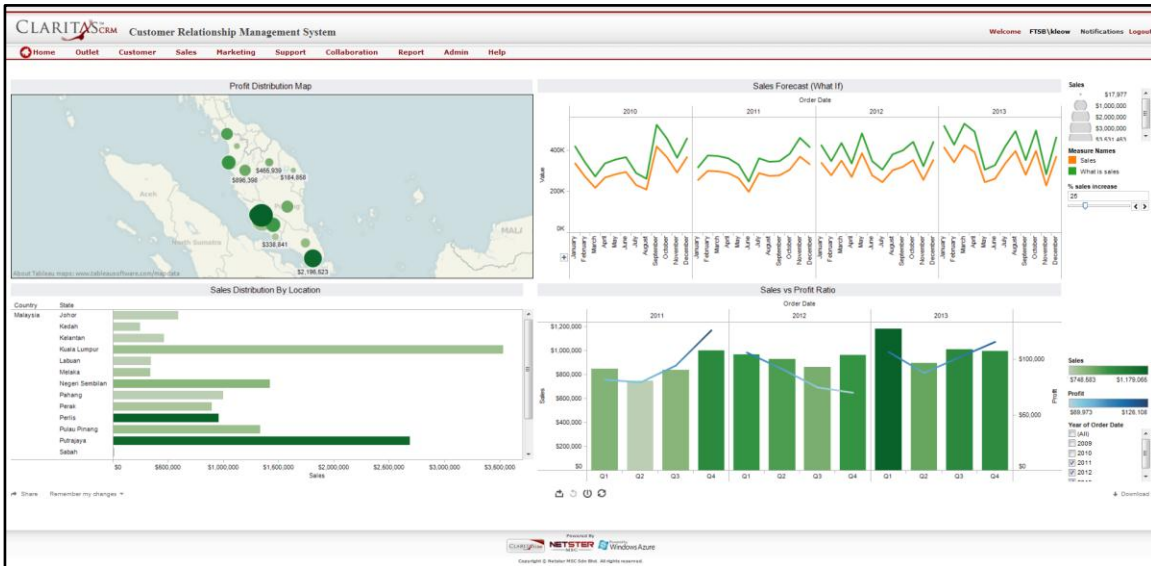
360 Views: Role | Team

No	User Name	First Name	Last Name	Role	Active	Allow	Mobile	Email
Administrator								
1	FTSB\yflim	Owen	Lim	Administrator	Active	True	-	yflim@netstermsc.com
2	mobiweb\tywong	Thong Yng	Wong	Administrator	Active	True	-	tywong@mobiweb.com.my
3	ftsbyazlan	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

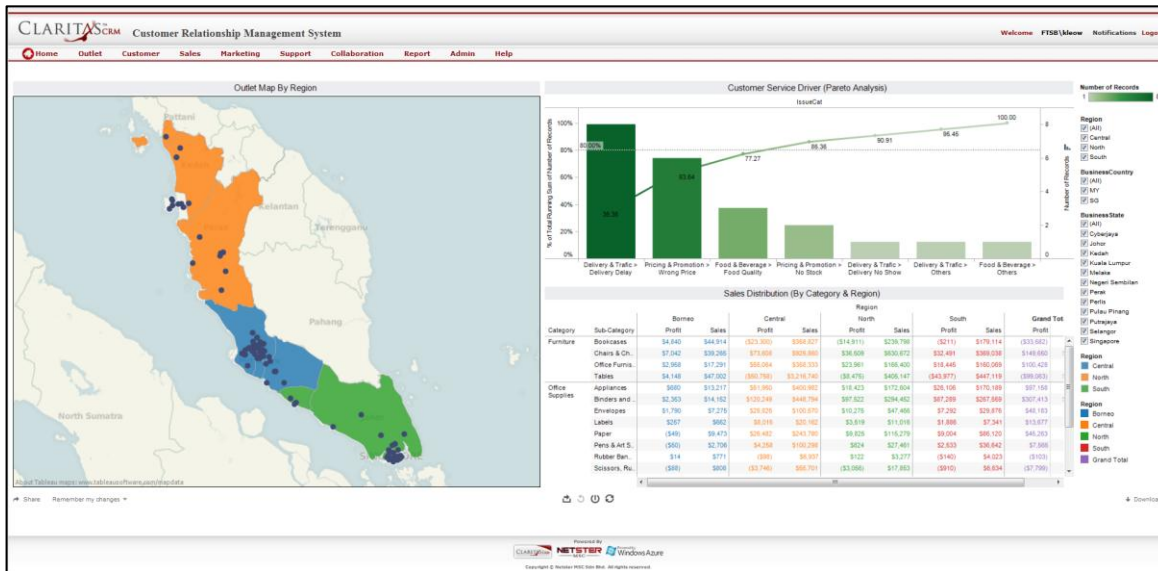
Done Internet | Protected Mode: Off 100%

6 CRM: Advanced Analytics

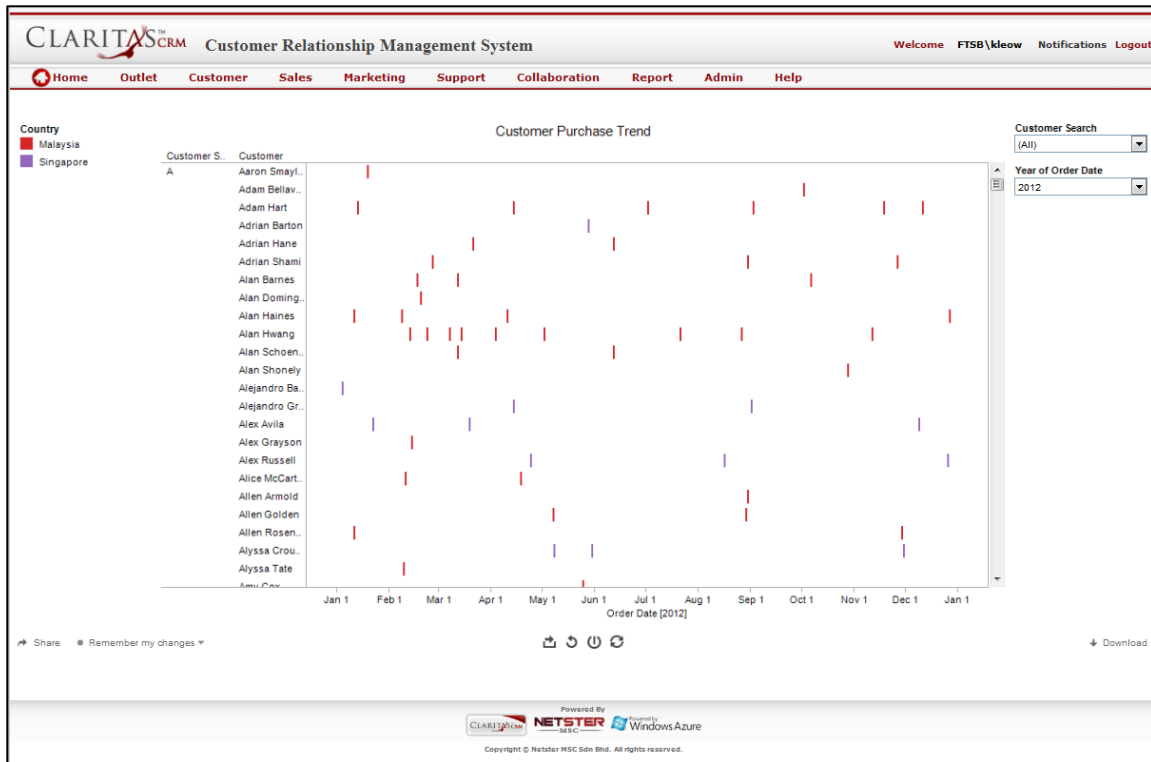
Interactive Dashboard (Sample 1)



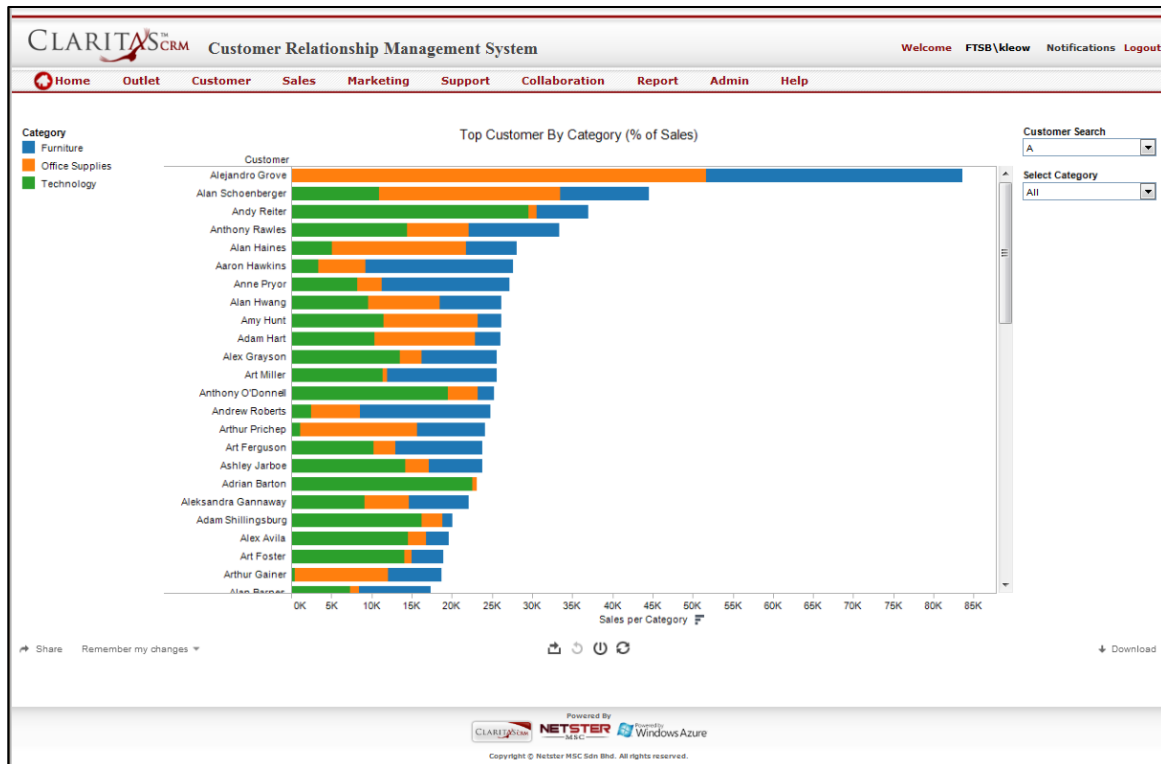
Interactive Dashboard (Sample 2)



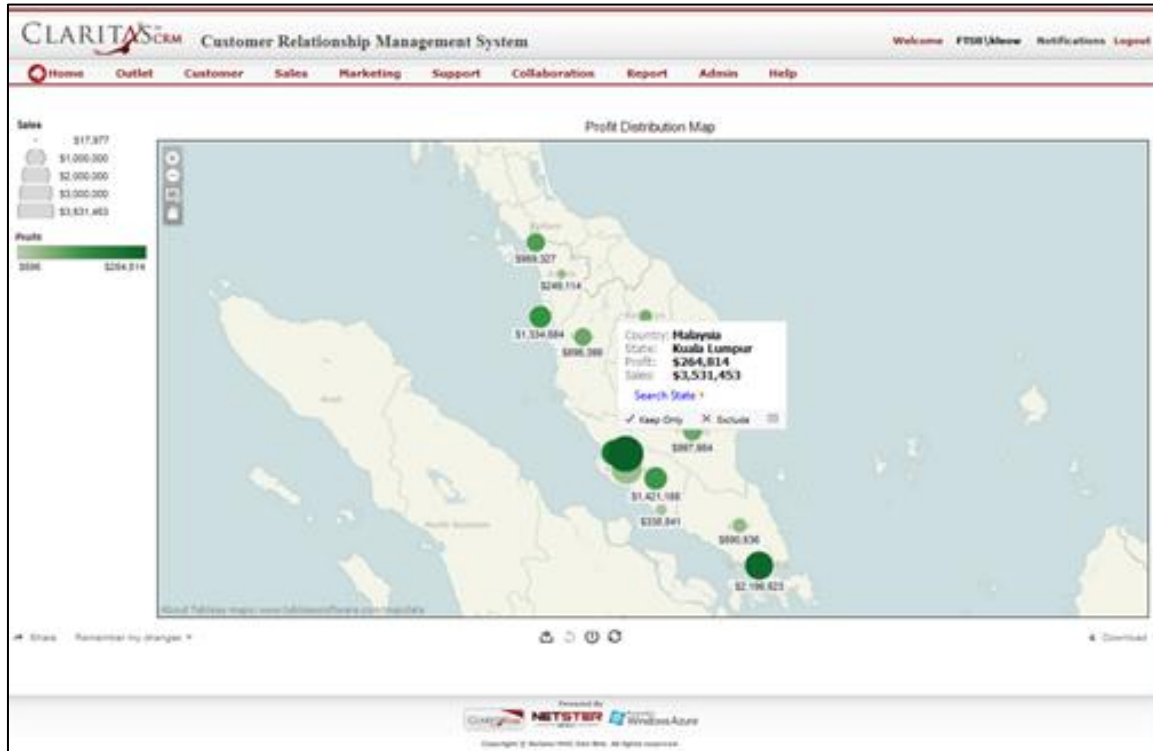
Sample: Customer Spending Pattern



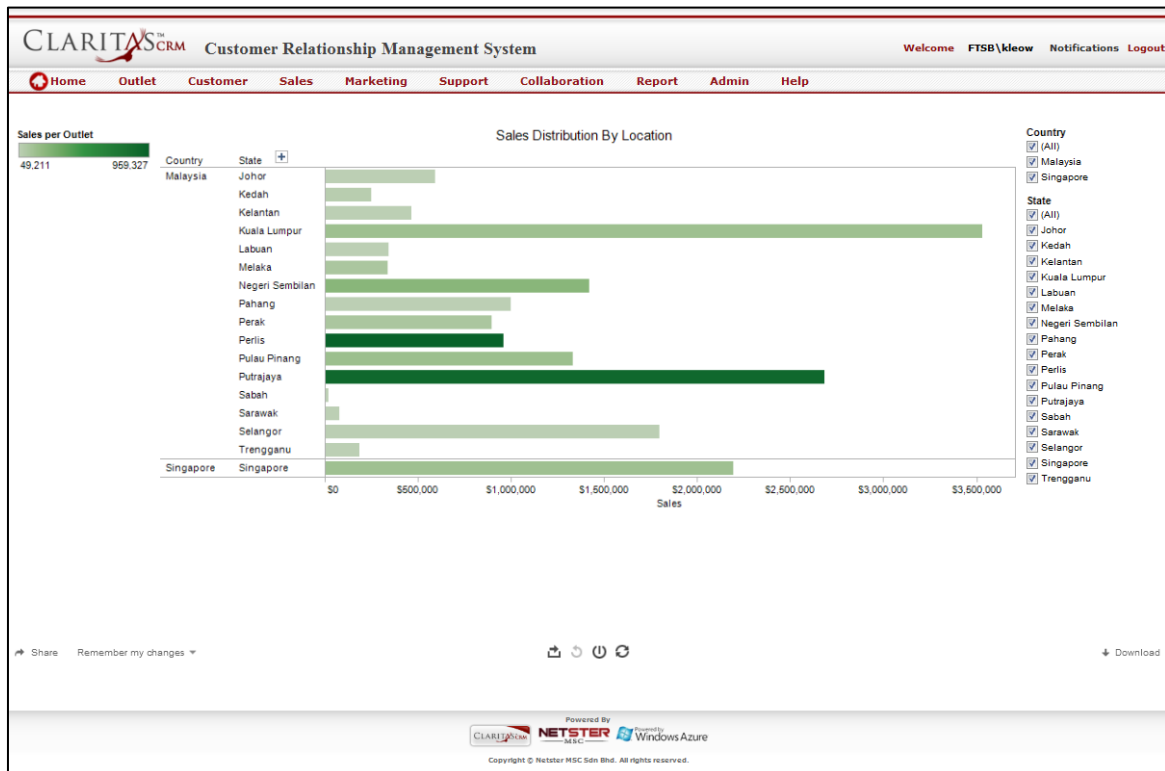
Sample: Top Customer (By Category)



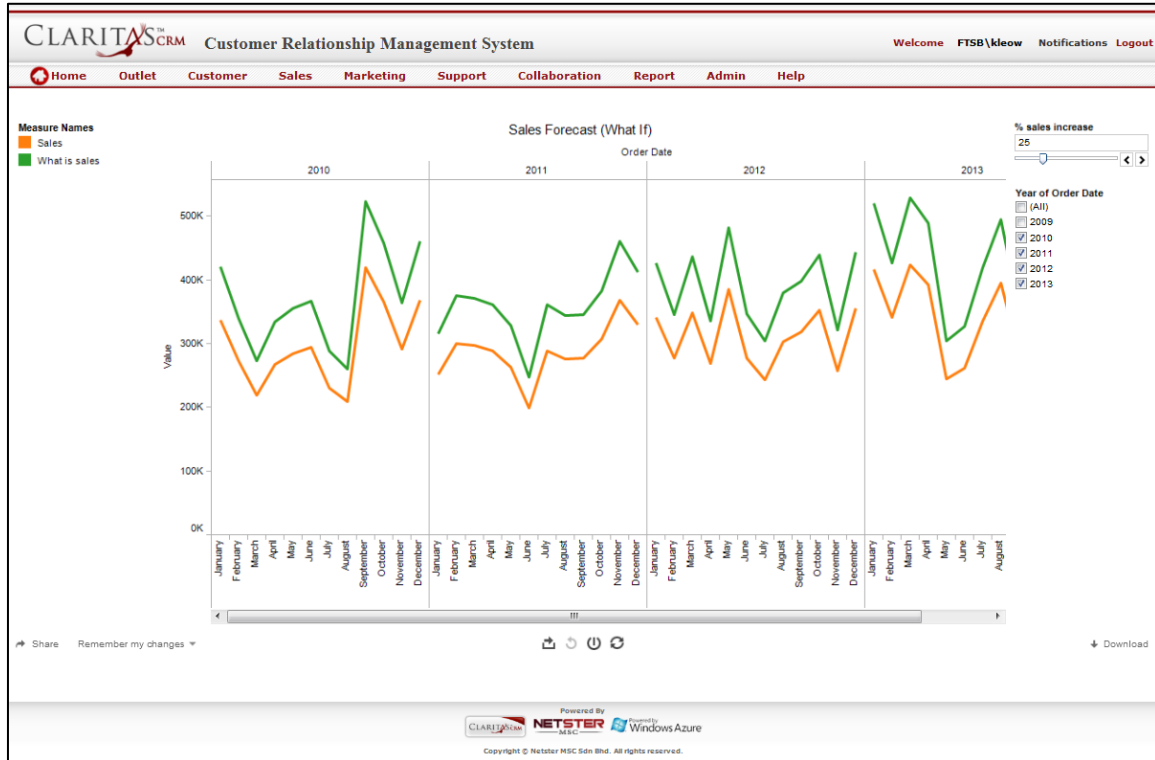
Sample: Sales Distribution Map



Sample: Sales Distribution (By States)



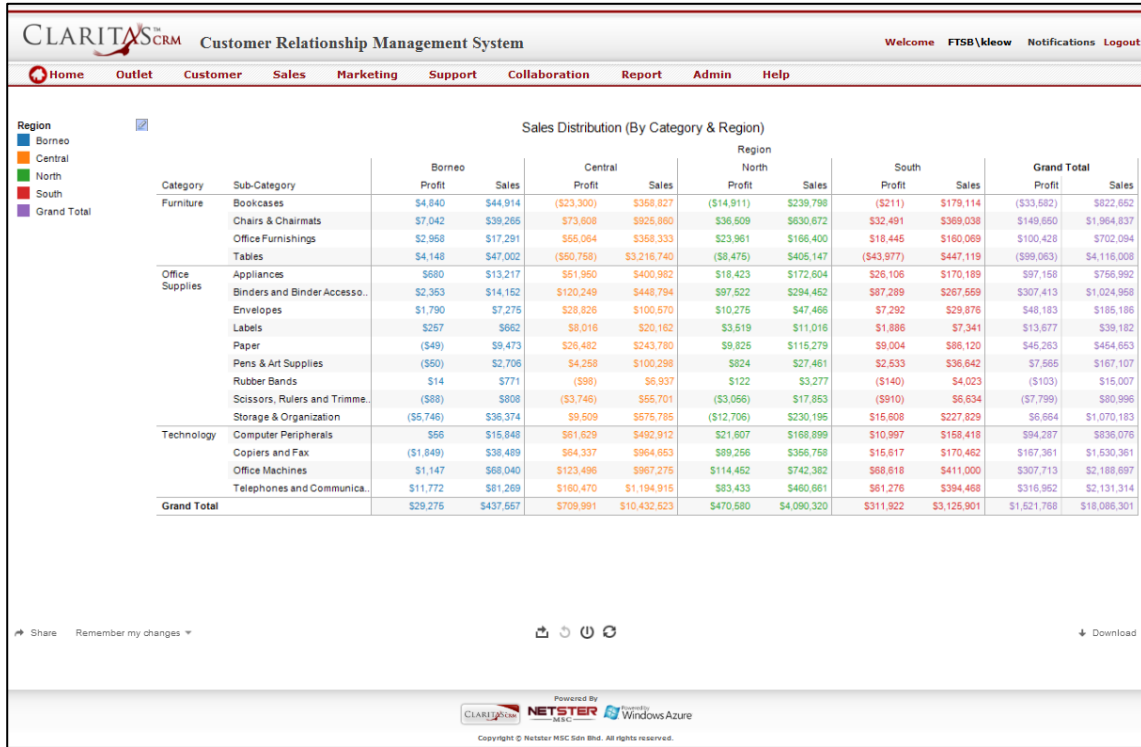
Sample: Sales Forecast



Sample: Sales vs. Profit



Sample: Sales Distribution (By Category, By Region)



Sample: Outlet Map

