USER GUIDE

Claritas Customer Relationship Management

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1 Introduction

Getting Started

1. Get connected to the Internet.
2. Open your browser. Click **Start** -> **All Programs** -> **Internet Explorer**.
3. Log on to Claritas CRM.
4. Enter your **Username**, **Password** and click **Login** to get access into ClaritasCRM.

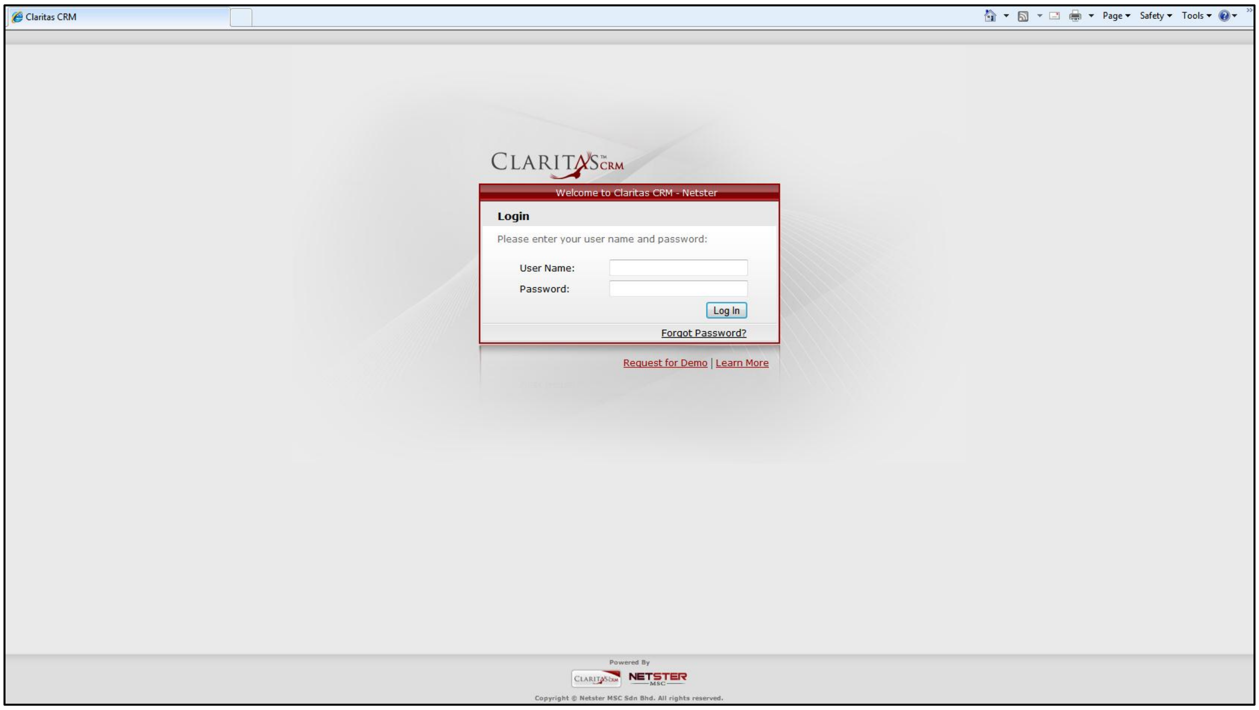


Figure 1.1: Claritas CRM Login Page

5. **REMEMBER** to logout whenever you are not using Claritas CRM. And it is suggested not to remember your password in your local machine to prevent third party user from accessing your account in your computer.

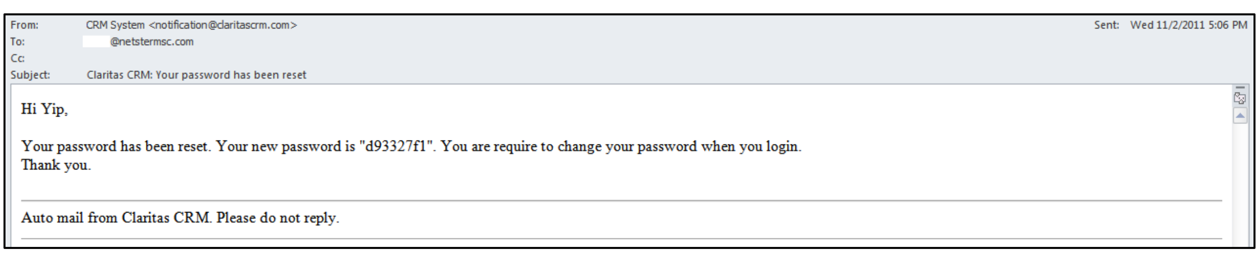
Forgot Password

If you forgot your password, click the Forgot Password? Hyperlink and it will open a section for you to enter your username. Enter your Username and click Submit button to reset your password. Message showing "New password has been sent to [User_Email]" will be displayed at the bottom of the Forgot Password section.

Note: A valid email must be entered in the user account for the password retrieval purpose. If no email is entered in the user account, password will not be able to retrieve.

Figure 1.2: Password Retrieval

Check your email for the auto mail for password retrieval. A new password will be included in the auto mail. You are required to change the password when you login before proceeding.



From: CRM System <notification@claritascrm.com> Sent: Wed 11/2/2011 5:06 PM
To: @netstermsc.com
Cc:
Subject: Claritas CRM: Your password has been reset

Hi Yip,

Your password has been reset. Your new password is "d93327f1". You are require to change your password when you login.
Thank you.

Auto mail from Claritas CRM. Please do not reply.

Figure 1.3: Password Retrieval Auto Mail

Enter your username in the User Name textbox and the new password in the auto mail and click the  button. Page will navigate to a new login form containing New Password and Confirm Password textboxes as below:

Figure 1.4: Enter New Password

2 General – Account

This module is to **create and store Account details**.

Account Listing

To view Account Listing, click at the **General > Account** menu at the Main Menu bar.

Figure 2.1: Account Menu in Main Menu

Page will load the list of the Account available in the system.

Company	Type	Industry	Country	Phone	Fax	Website	Updated By
Netster MSC Sdn Bhd	Shareholder	Technology	Malaysia	+60378054185	+60378054184	http://www.netstermsc.com	FTSB\scyip
Netster MSC Sdn Bhd	Customer	Technology	Malaysia	+603-78054186	+603-78054184	http://www.netstermsc.com	ftsb\kcfong
Netster MSC Sdn Bhd (Cyberjaya)	Partner	Technology	Malaysia	+60355678892	+60355678893	http://www.netstermsc.com	FTSB\scyip
Netster MSC Sdn Bhd (Kuala Lumpur)	Partner	Technology	Malaysia	+60377888080	+60377888081	http://www.netstermsc.com	FTSB\scyip
Telesto Comnet Pvt. Ltd.							FTSB\kcfong
Times Internet Ltd.							FTSB\kcfong
Todays News Networks Ltd.							FTSB\kcfong

Figure 2.2: Account Listing

To view the Account Details, click at the <u>Company Name</u> hyperlink in Company column.

Company	Type	Industry	Country	Phone	Fax	Website	Updated By
Netster MSC Sdn Bhd	Shareholder	Technology	Malaysia	+60378054185	+60378054184	http://www.netstermsc.com	FTSB\scyip
Netster MSC Sdn Bhd	Customer	Technology	Malaysia	+603-78054186	+603-78054184	http://www.netstermsc.com	ftsb\kcfong
Netster MSC Sdn Bhd (Cyberjaya)	Partner	Technology	Malaysia	+60355678892	+60355678893	http://www.netstermsc.com	FTSB\scyip
Netster MSC Sdn Bhd (Kuala Lumpur)	Partner	Technology	Malaysia	+60377888080	+60377888081	http://www.netstermsc.com	FTSB\scyip
Telesto Comnet Pvt. Ltd.							FTSB\kcfong
Times Internet Ltd.							FTSB\kcfong
Todays News Networks Ltd.							FTSB\kcfong

Figure 2.3: Company Name Hyperlink

After clicking the <u>Company Name</u> hyperlink, page will navigate to the **Account Management Detail** page which displays all the details of the Account.

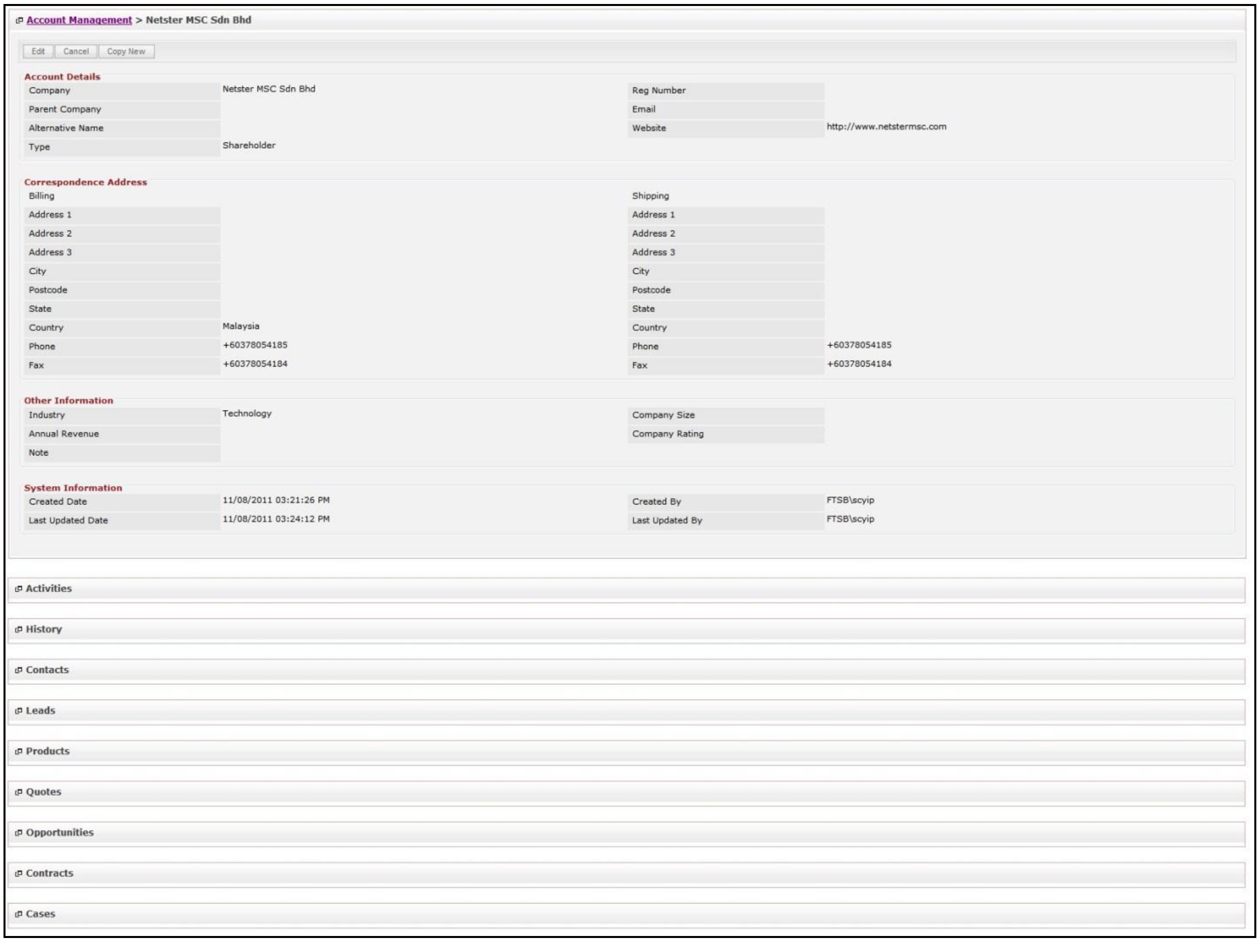


Figure 2.4: Account Management Detail Page

To copy the entire record and save as a new record, click Copy New button at **Account Maintenance Detail** page.

To create a new Account, click at Create New menu at the top of the Account Listing.

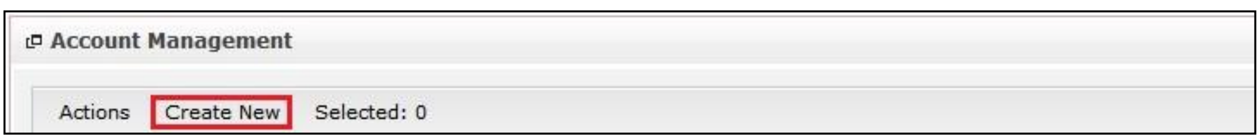


Figure 2.5: Create New Account Menu

After clicking Create New menu, page will navigate to **Account Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Account Management Detail** page or click Cancel button to cancel creating and navigates back to the **Account Listing** page.

***Related Topics**: See "[Create New Account](#)"*

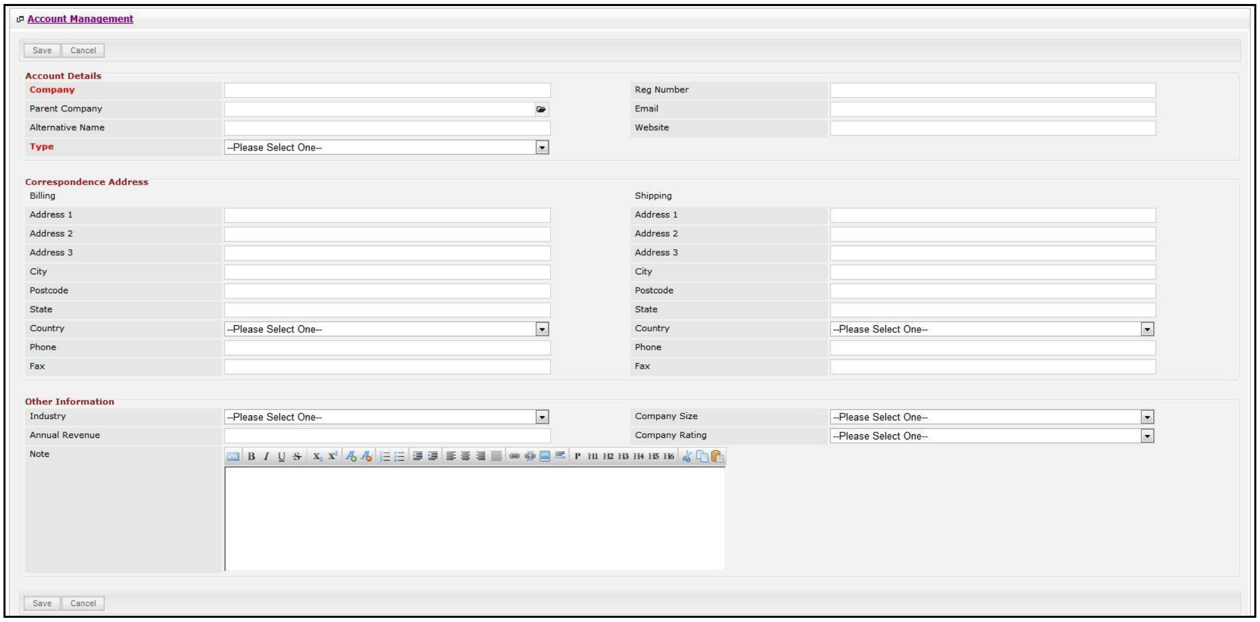


Figure 2.6: Account Management Create New Page

To **delete** an Account, select the record and click **Actions > Delete**.

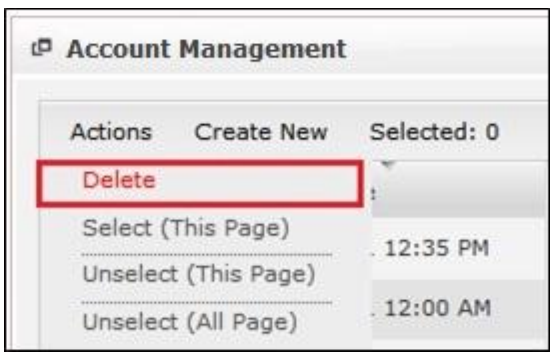


Figure 2.7: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 2.8: Message Showing Account Deleted Successfully

Deleted Account will **no longer** be displayed in Account Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

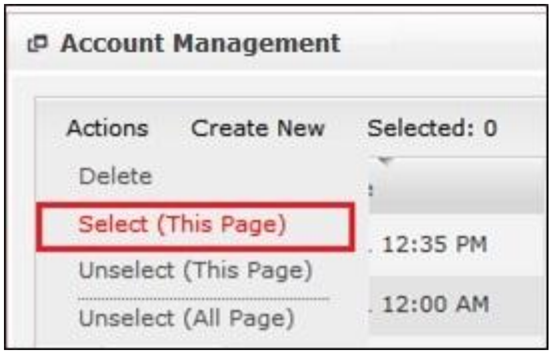


Figure 2.9: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

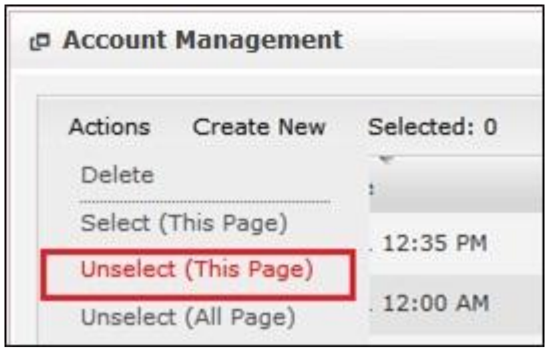


Figure 2.10: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

Figure 2.11: Actions > Unselect (All Pages) Menu

To go to the First Page of the listing, click at the **First Page** button.

To go to the Previous Page of the listing, click at the **Previous Page** button.

To go to the Next Page of the listing, click at the **Next Page** button.

To go to the Last Page of the listing, click at the **Last Page** button.

To refresh the listing page, click at the **Refresh** button.

To search for record/s, click at the **Search** button. An **Advance Search** section will expand at the bottom of the listing for user to select the search field and enter search value.

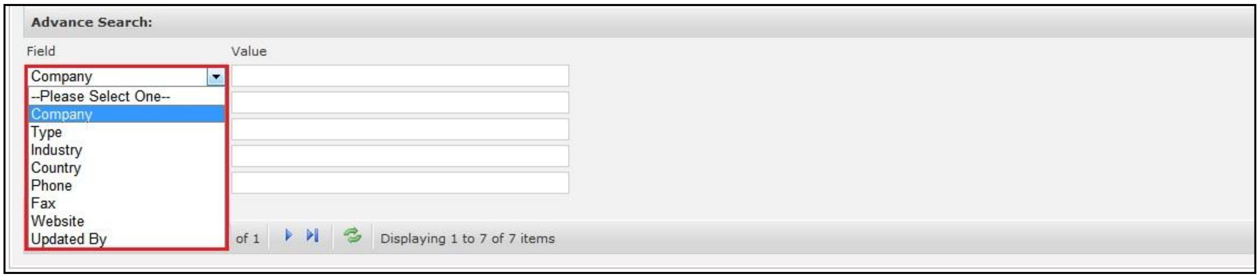


Figure 2.12: Account Advance Search

To edit the details of the Account, click at the **Edit** button or click the Edit button in **Account Management Detail** page. After clicking at the **Edit** button page will navigate to the **Account Management Edit** page.

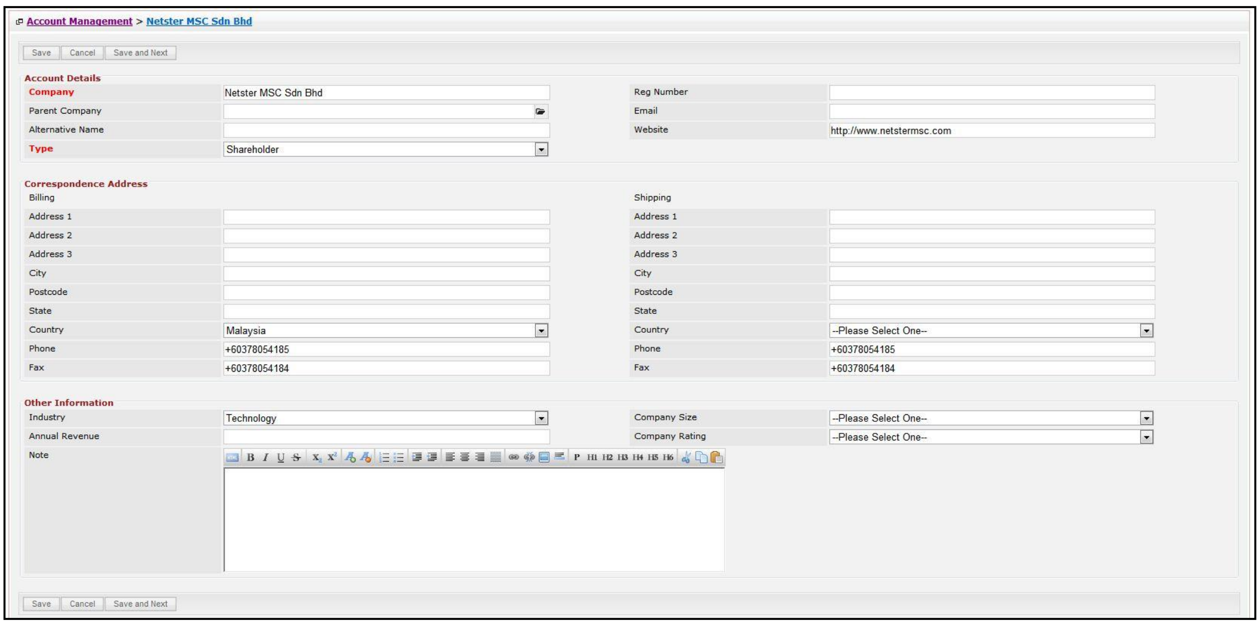


Figure 2.13: Account Management Edit Page

Edit the relevant details and click Save button to save the changes and navigates back to **Account Management Detail** page. Or click Cancel button to cancel editing and navigates back to the **Account Management Detail** page.

***Related Topics**: See "[Edit Account](#)"*

Create New Account

To create new Account, click at the **General > Account** menu at the Main Menu bar. Then click the Create New menu at the top of the **Account Listing**. After clicking Create New menu, page will navigate to **Account Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Account Management Detail** page.

There are **three** sections to be filled in to create a new Account: **Account Details, Correspondence Address** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Account Details**

- Compulsory fields: **Company** and **Type**.

Figure 2.14: Create Account - Account Details

- **Company** field will be the Company name for identification.
- **Type** field is the type of the Account created; Options available are: **Competitor**, **Customer**, **Dealer**, **Distributor**, **Investor**, **Partner**, **Principal**, **Prospect**, **Reseller**, **Shareholder** or **Other**.

2) **Correspondence Address**

- For user to enter some **Correspondence Address** of the user – Home Address and Business Address. (Optional)

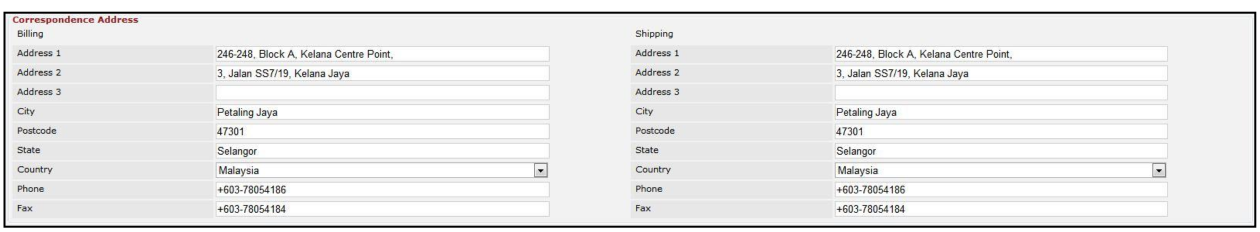


Figure 2.15: Create Account – Correspondence Address

3) **Other Information**

- For user to enter some **Other Information** of the user such as **NRIC**, **Marital Status**, **Emergency Contact**, **Gender**, **Date of Birth**, **Age** and **Note**. (Optional)
- **Age** field will be **auto-calculated** based on the **Date of Birth** field.

Figure 2.16: Create User – Other Information

To **cancel creating New Account**, click Cancel button. Page will navigate back to **Account Listing** page.

Edit Account

To edit Account details, click at the **General > Account** menu at the Main Menu bar. Click at the **Edit** button in **Account Listing** page or click at the Name hyperlink in **Account Listing** page then click the Edit button in **Account Management Detail** page. After clicking the **Edit** button or Edit button, page will navigate to **Account Management Edit** page. Edit the relevant details and click Save button to save the changes and navigates back to **Account Management Detail** page or click Save and Next button to save the changes and navigates to the **Account Management Edit page** for the next record.

There are **three** sections to be filled in to be edited: **Account Details** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Account Details**

- Compulsory fields: **Company** and **Type**.

Figure 2.17: Create Account - Account Details

- **Company** field will be the Company name for identification.
- **Type** field is the type of the Account created; Options available are: **Competitor**, **Customer**, **Dealer**, **Distributor**, **Investor**, **Partner**, **Principal**, **Prospect**, **Reseller**, **Shareholder** or **Other**.

2) **Correspondence Address**

- For user to enter some **Correspondence Address** of the user – Home Address and Business Address. (Optional)

Figure 2.18: Create Account – Correspondence Address

3) **Other Information**

- For user to enter some **Other Information** of the user such as **NRIC**, **Marital Status**, **Emergency Contact**, **Gender**, **Date of Birth**, **Age** and **Note**. (Optional)
- **Age** field will be **auto-calculated** based on the **Date of Birth** field.

Figure 2.19: Create User – Other Information

To **cancel editing New Account**, click Cancel button at **Account Management Detail** page. Page will navigate back to **Account Listing** page.

Account – Activities Subpanel

This subpanel contains any activities related to the Account. **Call**, **Meeting** and **Task** created will be displayed in this **Activities** subpanel.

Account – Activities Subpanel (New Call)

To create a New Call related to an Account, click at the New Call menu at **Activities** subpanel. Once New Call menu is clicked, a Call Management window will pop up for user to create a New Call. Enter the details of the Call and click Save button to create the New Call. Or click Cancel menu to cancel creating New Call.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

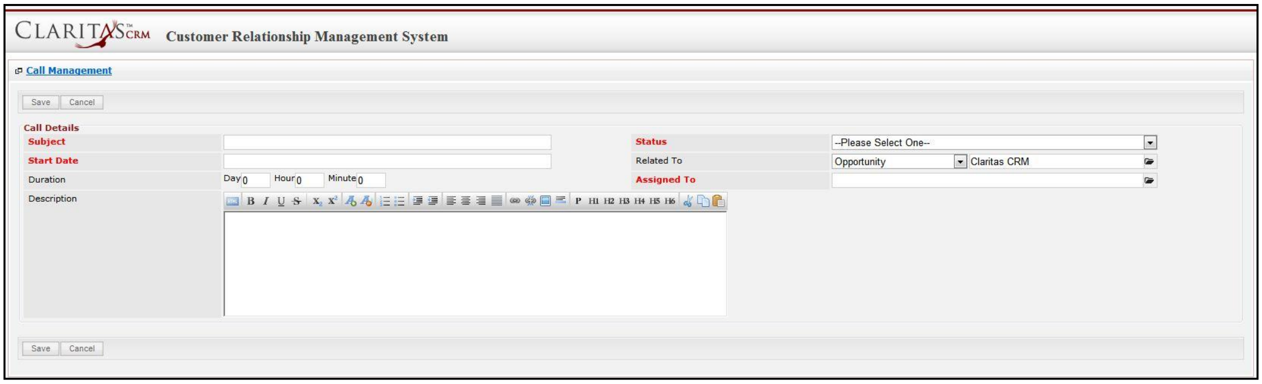


Figure 2.20: New Call Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Account**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Call. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Call is created. Click at the Done menu to set the date and time.

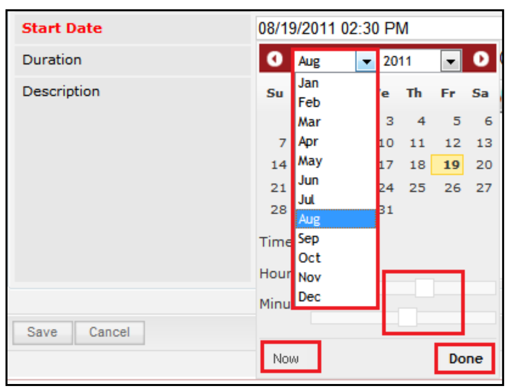


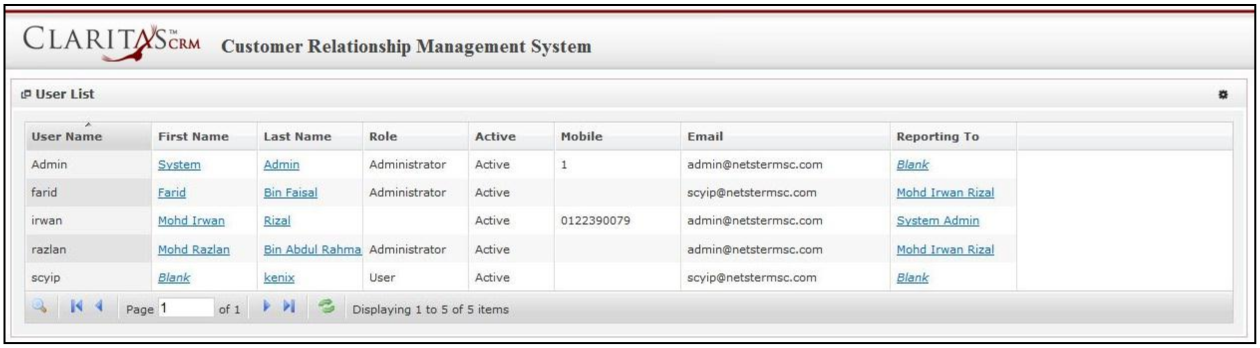
Figure 2.21: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Call for the related Account. There are two ways of entering the Assigned To field:

  i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 2.22: Assigned To Field Auto Complete Dropdown

ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



CLARITAS CRM Customer Relationship Management System

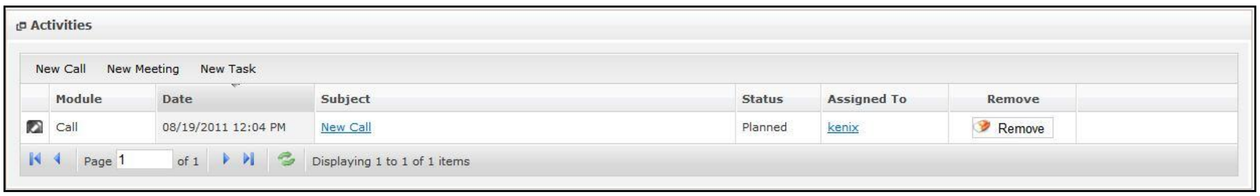
User List

User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 2.23: Assigned To Popup

- After a New Call is created, the subpanel will auto-refresh and display the newly-created Call.



Activities

New Call New Meeting New Task

Module	Date	Subject	Status	Assigned To	Remove
Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Page 1 of 1 Displaying 1 to 1 of 1 items

Figure 2.24: Activities Subpanel List New Call

To **cancel creating New Call**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Call and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Call.

Account – Activities Subpanel (New Meeting)

To create a New Meeting related to an Account, click at the New Meeting menu at **Activities** subpanel. Once New Meeting menu is clicked, a Meeting Management window will pop up for user to create a New Meeting. Enter the details of the Meeting and click Save button to create the New Meeting. Or click Cancel menu to cancel creating New Meeting.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

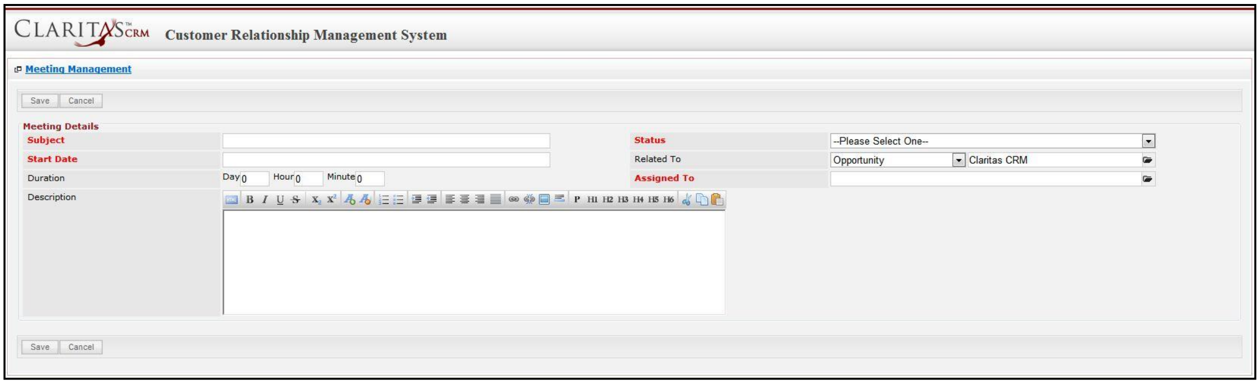


Figure 2.25: New Meeting Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Account**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Meeting. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Meeting is created. Click at the Done menu to set the date and time.

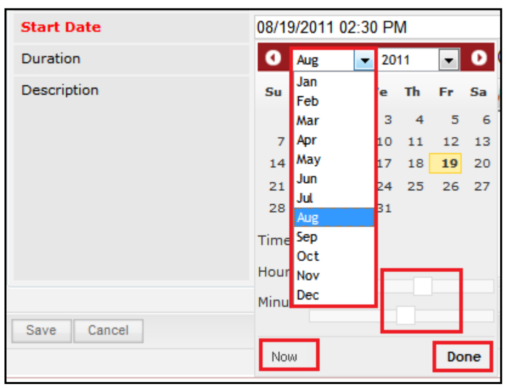


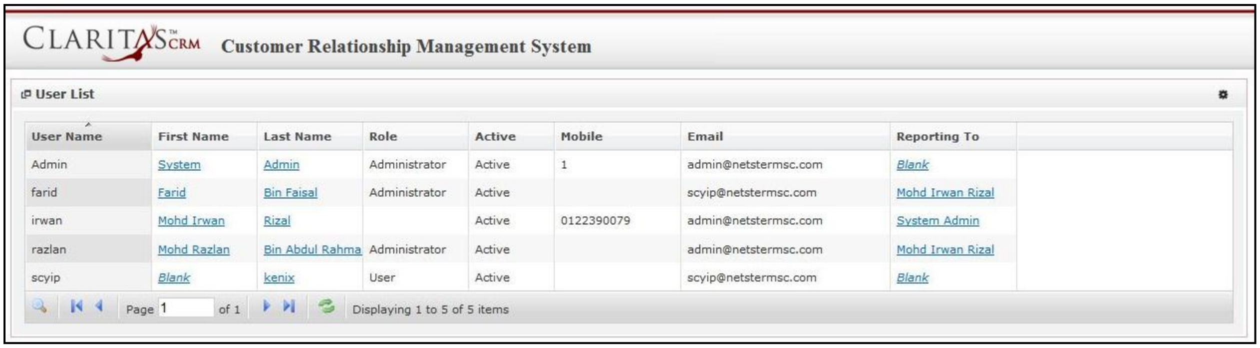
Figure 2.26: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Meeting for the related Account. There are two ways of entering the **Assigned To** field:

  i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 2.27: Assigned To Field Auto Complete Dropdown

ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

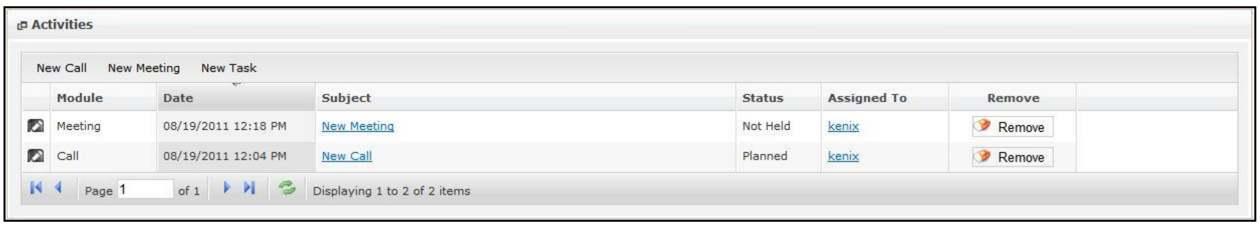


User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 2.28: Assigned To Popup

- After a New Meeting is created, the subpanel will auto-refresh and display the newly-created Meeting.



Module	Date	Subject	Status	Assigned To	Remove
Meeting	08/19/2011 12:18 PM	New Meeting	Not Held	kenix	Remove
Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Page 1 of 1 Displaying 1 to 2 of 2 items

Figure 2.29: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Meeting and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Meeting.

Account – Activities Subpanel (New Task)

To create a New Task related to an Account, click at the New Task menu at **Activities** subpanel. Once New Task menu is clicked, a Task Management window will pop up for user to create a New Task. Enter the details of the Task and click Save button to create the New Task. Or click Cancel menu to cancel creating New Task.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

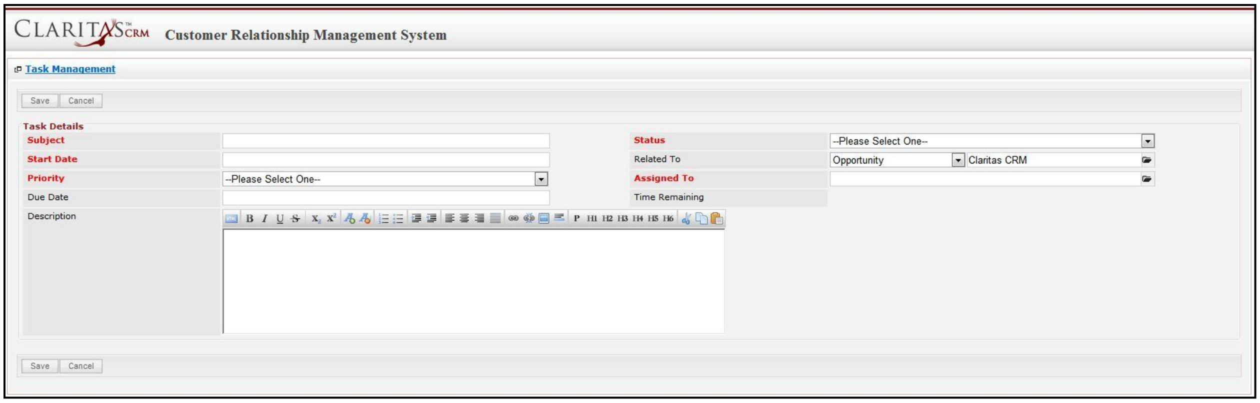


Figure 2.30: New Task Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Priority**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Account**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Task. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Task is created. Click at the **Done** menu to set the date and time.

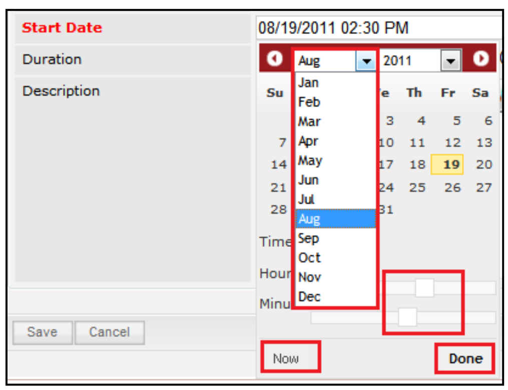


Figure 2.31: Start Date Time

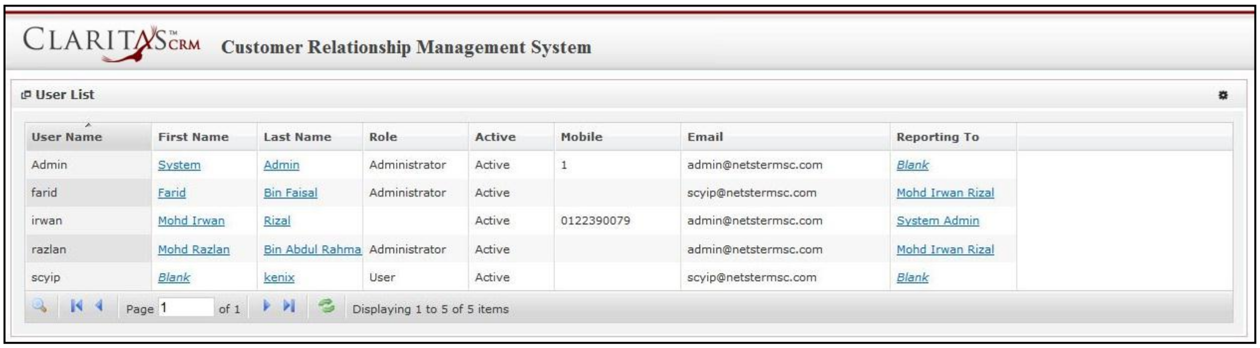
- **Priority** field once selected will auto-populate the **Due Date** field and **Time Remaining** accordingly.
- There are five **Statuses** available for Task- **Not Started**, **In Progress**, **Completed**, **Pending Input**, and **Deferred.**
- **Assigned To** field is to assign a User to in charge of the Task for the related Account. There are two ways of entering the Assigned To field:
  i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available

users; the textbox will be auto-cleared. (Click at the User name to select the user)

OR

Figure 2.32: Assigned To Field Auto Complete Dropdown

ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

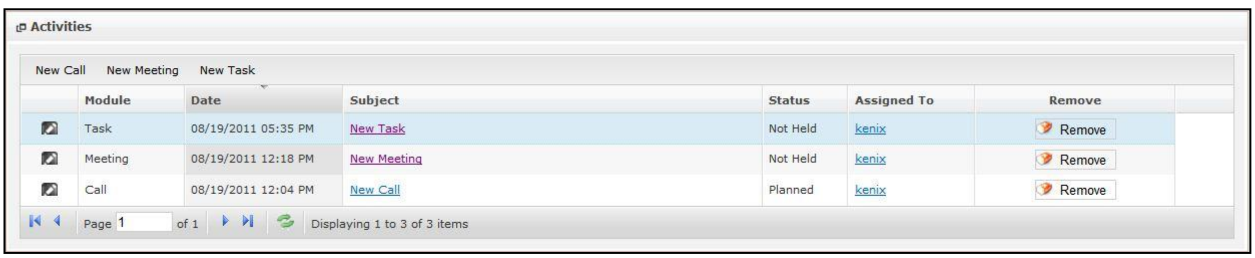


User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 2.33: Assigned To Popup

- After a New Task is created, the subpanel will auto-refresh and display the newly-created Task.



Module	Date	Subject	Status	Assigned To	Remove
Task	08/19/2011 05:35 PM	New Task	Not Held	kenix	Remove
Meeting	08/19/2011 12:18 PM	New Meeting	Not Held	kenix	Remove
Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Page 1 of 1 Displaying 1 to 3 of 3 items

Figure 2.34: Activities Subpanel List New Task

To **cancel creating New Task**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Task and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Task.

Account – History Subpanel

This subpanel contains any history or note related to the Account.

Account – History Subpanel (New Note)

To create a New Note related to an Account, click at the New Note menu at **History** subpanel. Once New Note menu is clicked, a Note Management window will pop up for user to create a New Note.

Enter the details of the Note and click Save button to create the New Note.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

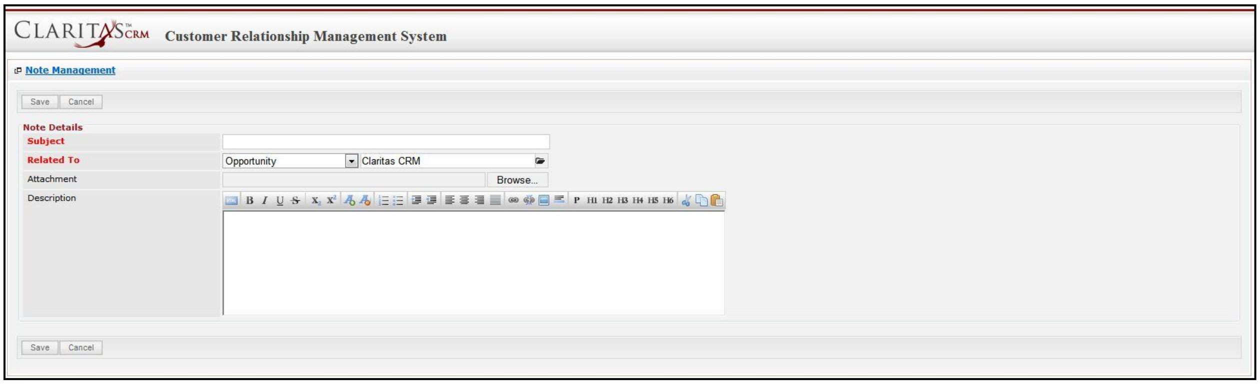


Figure 2.35: New Note Management Popup

- Compulsory fields: **Subject**, and **Related To**.
- **Related To** field will auto populate the name of the related **Account**.
- **Attachment** field allow file extensions are as below (format that is not stated are not allowed to be uploaded):
    - **Documents:** .doc, .docx, .xls, .xlsx, . rtf, .txt, .pdf, .ppt, .pptx
    - **Pictures:** .jpg, .bmp, .png, .bmp, .gif
    - **Audio:** .mp3, .wma
    - **Video:** .3gp, .mp4, .rmvb, .avi, .flv
    - **Archive:** .zip, .rar
- After a New Note is created, the subpanel will auto-refresh and display the newly-created Note.

Figure 2.36: History Subpanel List New Note

To **cancel creating New Note**, click Cancel button. A confirmation dialog showing “Are you sure you want to close this window?” will prompt user to cancel creating New Note and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Note.

Account – Contacts Subpanel

This subpanel contains Contact related to the **Account**.

Create New Contact

To create a New Contact related to this Account, click at the Create New menu at **Contact List** subpanel. Once Create New menu is clicked, a Contact Management window will pop up for user to create a New Contact. Enter the details of the Contact and click Save button to create the New Contact.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

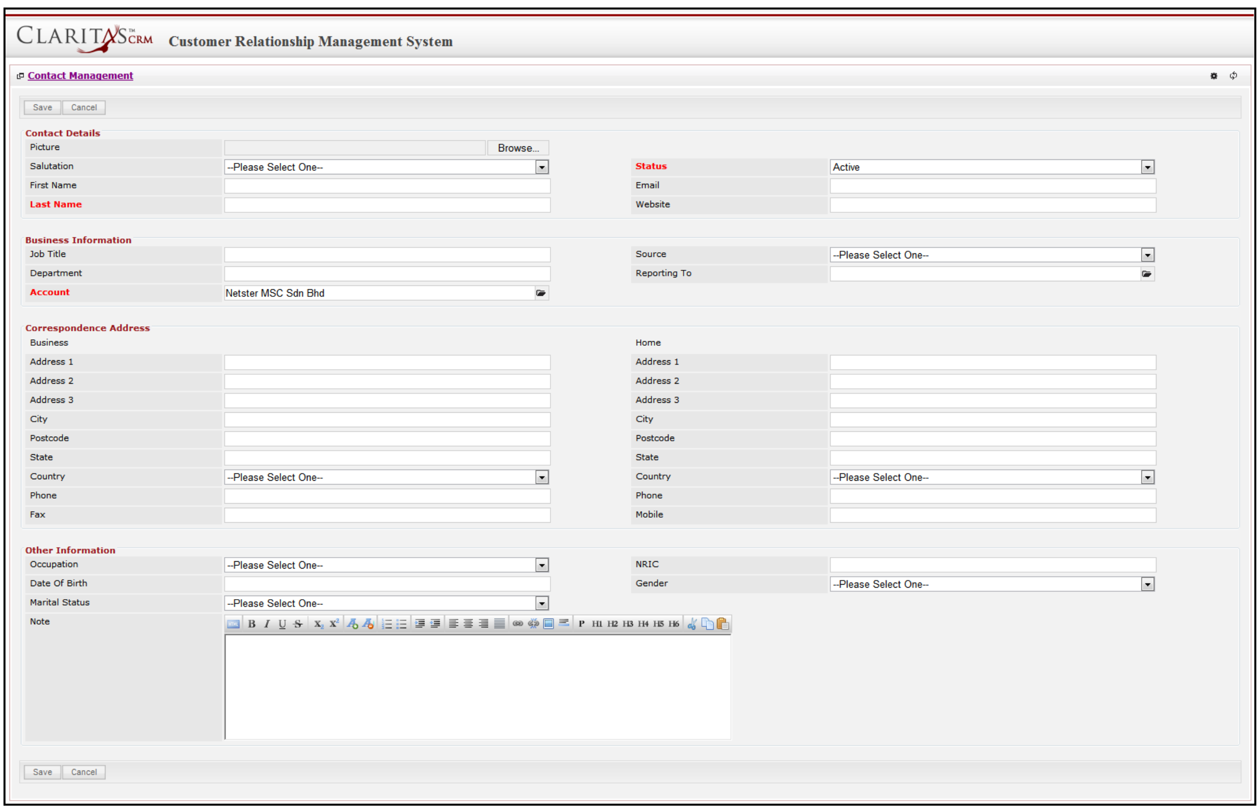


Figure 2.37: New Contact Management Popup

Compulsory fields: **Last Name**, **Status** and **Account**.

There are **four** main sections to be filled in to create a new Contact: **Contact Profile**, **Business Information**, **Correspondence Address** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Contact Details**

- Compulsory fields: **Last Name** and **Status**

Figure 2.38: Create Contact – Contact Details

- **Last Name** field will be the last name of the user for identification.
- **Status** field defines if the status of the user is **Active** or **Inactive**.

2) **Business Information**

- Compulsory fields: **Last Name** and **Status**
- For user to enter some **Business Information** of the user such as **Job Title**, **Department**, **Source** and **Reporting To**.

Figure 2.39: Create Contact – Business Information

- **Account** field will auto populate the name of the related **Account**.

3) **Correspondence Address**

- For user to enter some **Correspondence Address** of the user – Home Address and Business Address. (Optional)

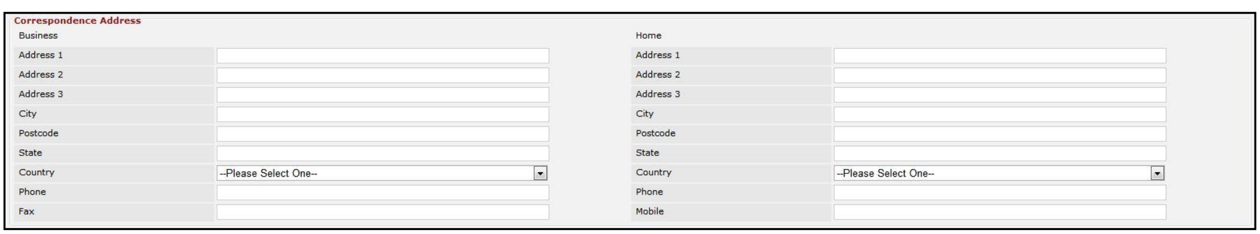


Figure 2.40: Create Contact – Correspondence Address

4) **Other Information**

- For user to enter some **Other Information** of the user such as **Occupation**, **Date of Birth**, **Marital Status**, **NRIC**, **Gender** and **Note**. (Optional)

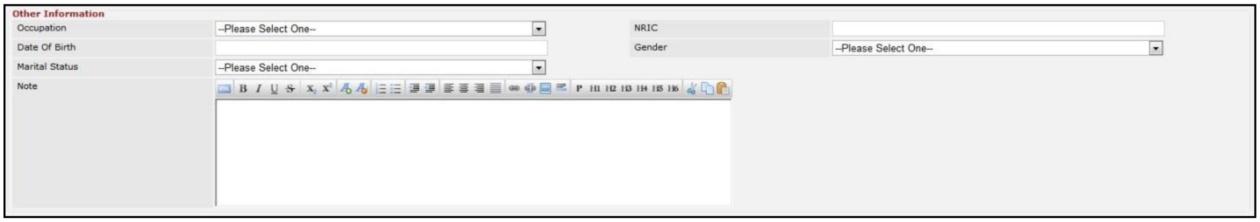


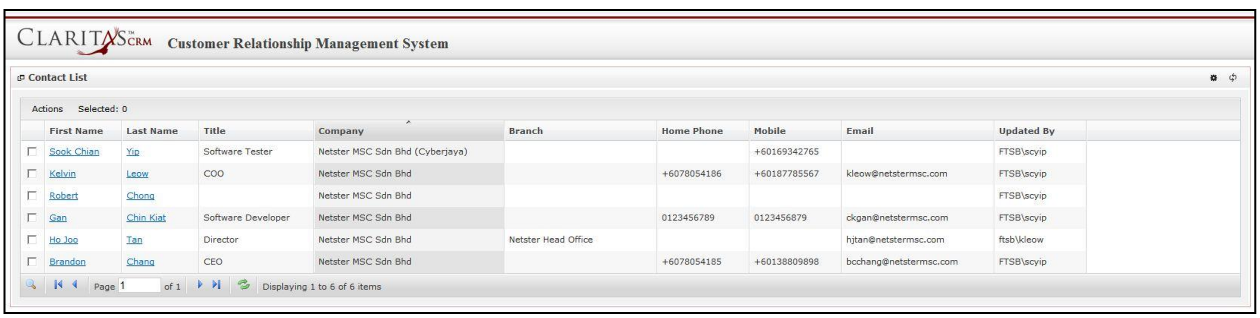
Figure 2.41: Create Contact – Other Information

To **cancel creating New Contact**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Contact and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Contact.

Select Contact

To select a **Contact** to this **Account**, click at the Select menu. Once Select menu is clicked, a **User List** window will pop up for user to select an **Account**. Click at the **First Name** or **Last Name** hyperlink in **First Name** or **Last Name column** to select the **Contact** that associate with this **Account**.



First Name	Last Name	Title	Company	Branch	Home Phone	Mobile	Email	Updated By
Sook Chian	Yip	Software Tester	Netster MSC Sdn Bhd (Cyberjaya)			+60169342765		FTSB\scyip
Kelvin	Leow	COO	Netster MSC Sdn Bhd		+6078054186	+60187785567	kleow@netstermsc.com	FTSB\scyip
Robert	Chong		Netster MSC Sdn Bhd					FTSB\scyip
Gan	Chin Kiat	Software Developer	Netster MSC Sdn Bhd		0123456789	0123456879	ckgan@netstermsc.com	FTSB\scyip
Ho Joo	Tan	Director	Netster MSC Sdn Bhd	Netster Head Office			hjtan@netstermsc.com	ftsb\kleow
Brandon	Chang	CEO	Netster MSC Sdn Bhd		+6078054185	+60138809898	bcchang@netstermsc.com	FTSB\scyip

Figure 2.42: Select User Popup

Account – Leads Subpanel

This subpanel contains Leads related to the **Account**.

Create New Lead

To create a New Lead related to this Account, click at the Create New menu at **Lead List** subpanel. Once Create New menu is clicked, a Lead Management window will pop up for user to create a New Lead. Enter the details of the Lead and click Save button to create the New Lead.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

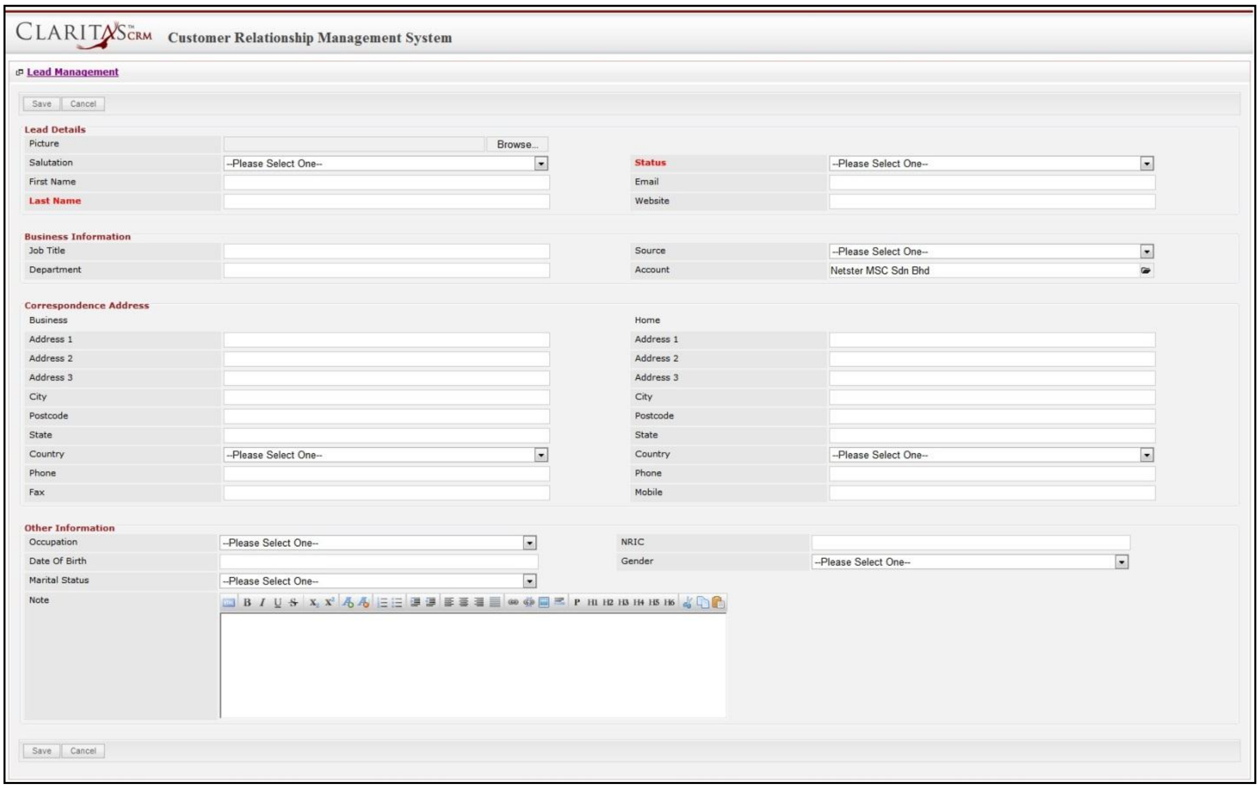


Figure 2.43: New Lead Management Popup

Compulsory fields: **Last Name** and **Status**.

There are **four** main sections to be filled in to create a new Lead: **Lead Profile**, **Business Information**, **Correspondence Address** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Contact Details**

- Compulsory fields: **Last Name** and **Status**

Figure 2.44: Create Lead – Lead Details

- **Last Name** field will be the last name of the user for identification.
- **Status** field defines if the status of the lead is **Active** or **Inactive**.

2) **Business Information**

- For user to enter some **Business Information** of the user such as **Job Title**, **Department**, **Source** and **Account**.

Figure 2.45: Create Lead – Business Information

- **Account** field will auto populate the name of the related **Account**.

3) **Correspondence Address**

- For user to enter some **Correspondence Address** of the user – Home Address and Business Address. (Optional)

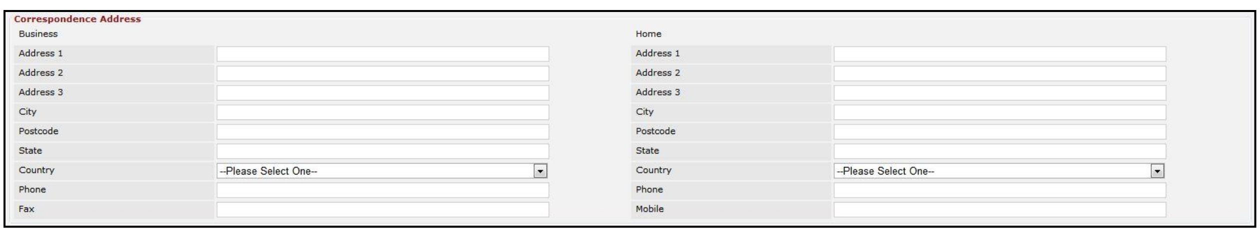


Figure 2.46: Create Lead – Correspondence Address

4) **Other Information**

- For user to enter some **Other Information** of the user such as **Occupation**, **Date of Birth**, **Marital Status**, **NRIC**, **Gender** and **Note**. (Optional)

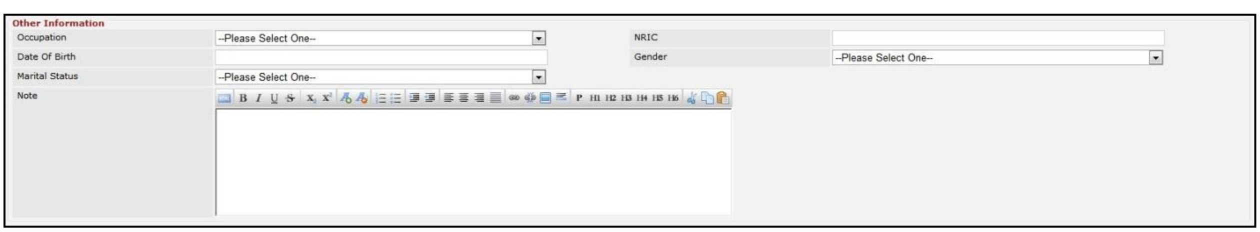


Figure 2.47: Create Lead – Other Information

To **cancel creating New Lead**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Lead and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Lead.

Select Lead

To select a **Lead** to this **Acount**, click at the Select menu. Once Select menu is clicked, a **Lead List** window will pop up for user to select an **Account**. Click at the **First Name** or **Last Name** hyperlink in **First Name** or **Last Name column** to select the **Lead** that associate with this **Account**.

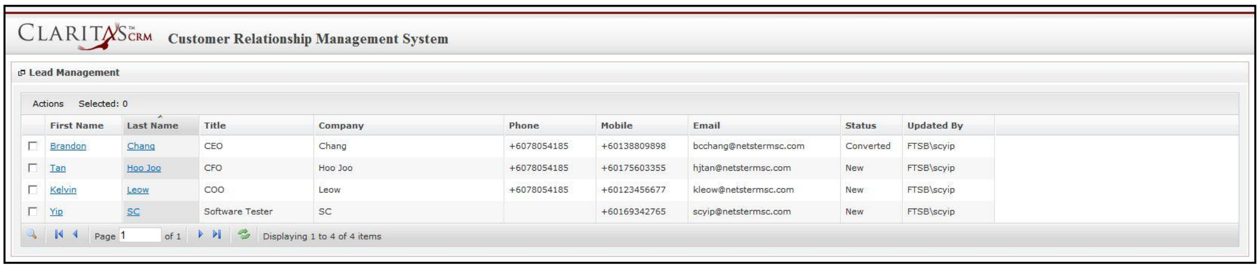


Figure 2.48: Select Lead Popup

Account – Product Subpanel

This subpanel contains Products related to the **Account**.

Create New Products

To create a New Product related to this Account, click at the Create New menu at **Product List** subpanel. Once Create New menu is clicked, a Product Management window will pop up for user to create a New Product. Enter the details of the Product and click Save button to create the New Product.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

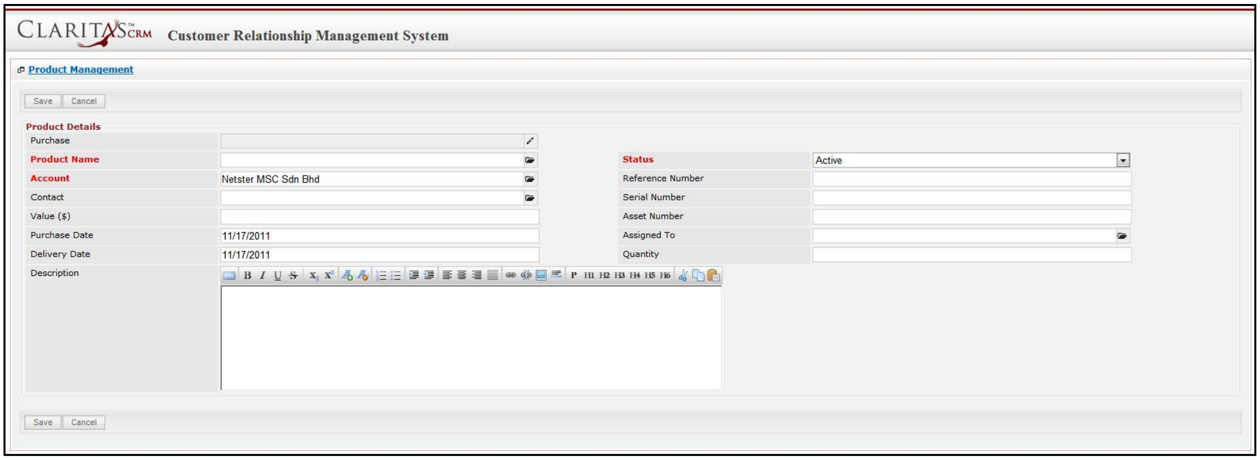


Figure 2.49: New Product Management Popup

Compulsory fields: **Product Name**, **Account** and **Status**.

- **Product Name** field will be the product name for identification.
- **Account** field will auto populate the name of the related **Account**.
- **Status** field defines if the status of the product is **Active** or **Inactive**.

To **cancel creating New Product**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Product and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Product.

Select Product

To select a **Lead** to this **Account**, click at the Select menu. Once Select menu is clicked, a **Lead List** window will pop up for user to select an **Account**. Click at the Product Name hyperlink in **Product Name column** to select the **Product** that associate with this **Account**.

Figure 2.50: Select Product Popup

Account – Quotes Subpanel

This subpanel contains any Quote related to the **Account**.

Create New Quote

To create a New Quote related to an Account, click at the Create New menu at **Quotes** subpanel. Once Create New menu is clicked, a Quote Management window will pop up for user to create a New Quote.

Enter the details of the Quote and click Save button to create the New Quote.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

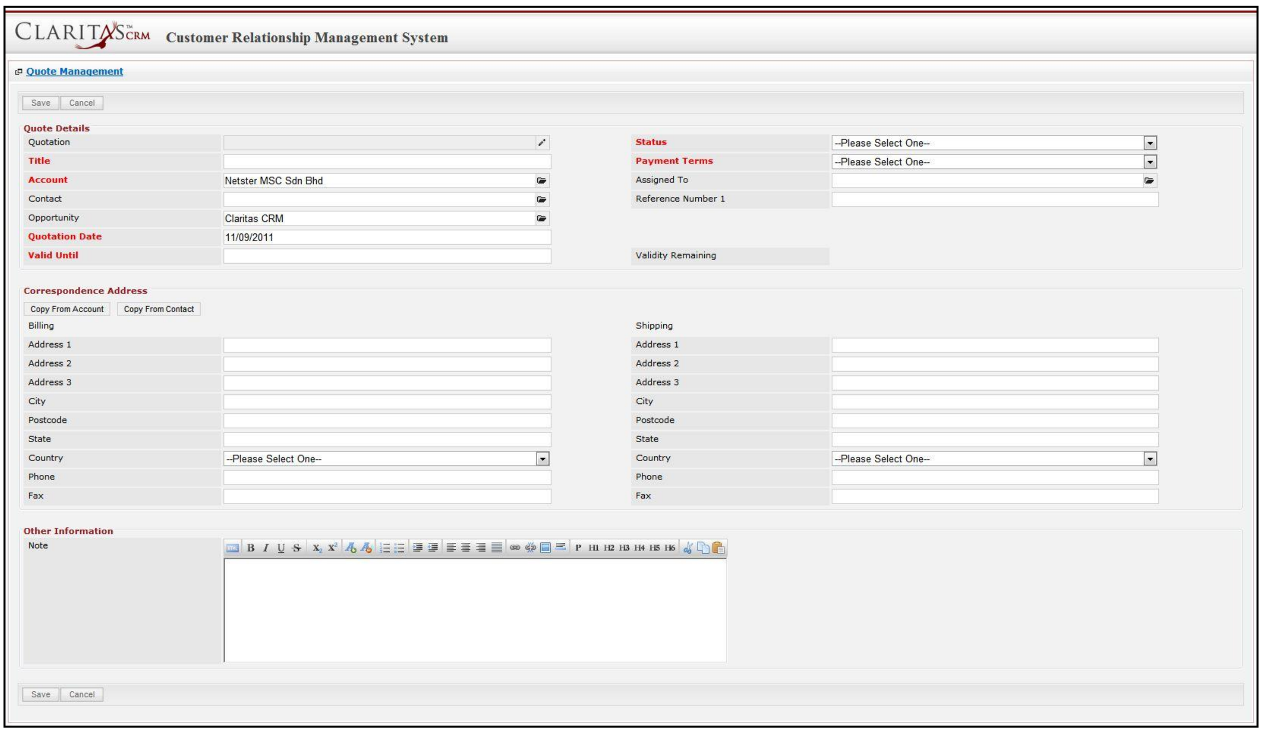


Figure 2.51: New Quote Management Popup

- Compulsory fields: **Title**, **Account**, **Quotation Date**, **Valid Until**, **Status** and **Payment Terms**.
- **Title** field is the title of the Quote;
- **Account** field will auto populate the name of the related **Account** (if available).
- **Quotation Date** field when clicked will populate a calendar for user to select the date for the Quote. Click at the **Month** and **Year** dropdown to navigate to the selected date.

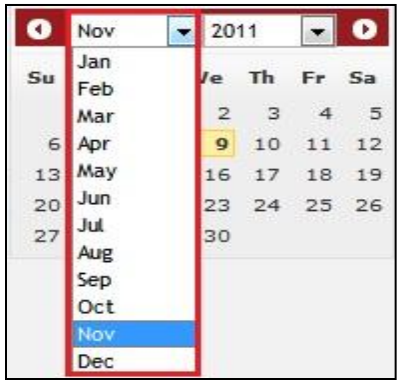


Figure 2.52: Quotation Date

- **Valid Until** field when clicked will populate a calendar for user to select the date where this Quote is Valid Until. Click at the **Month** and **Year** dropdown to navigate to the selected date.

Figure 2.53: Valid Until

- **Status** field is the status of the Quote; the options for Status are: **Draft**, **Negotiation**, **Delivered**, **On Hold**, **Closed Won** and **Closed Lost**.
- **Payment Terms** field is the term for the payment; the options for Payment Terms are: **Cash on Delivery**, **Net 7 Days**, **Net 14 Days**, **Net 30 Days** and **Net 60 Days**.
- In **Correspondence Address** section, user can choose to copy the address from the related Account by clicking the Copy From Account button or copy the address from the related Contact by clicking the Copy From Contact button. Otherwise, user can also choose to manually enter the Billing and Shipping address.
- After a New Quote is created, the subpanel will auto-refresh and display the newly-created Quote.

Figure 2.54: Quotes Subpanel List New Quote

To **cancel creating New Quote**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Quote and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Quote.

Select Quote

To select a **Quote** to this **Account**, click at the Select menu. Once Select menu is clicked, a **Quote List** window will pop up for user to select a **Quote**. Click at the **Quote** hyperlink in **Quote column** to select the **Quote** that associate with this **Account**.

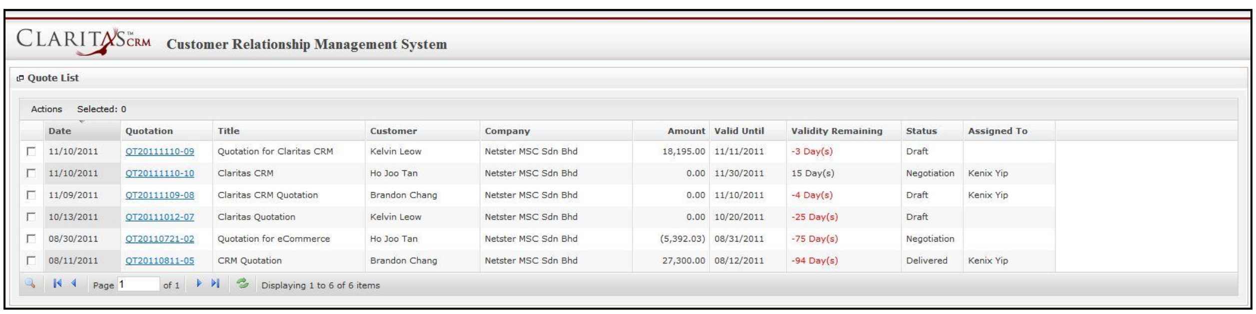


Figure 2.55: Select Quote Popup

Account – Opportunities Subpanel

This subpanel contains Opportunities related to the **Account**.

Create New Opportunity

To create a New Opportunity related to this Account, click at the Create New menu at Opportunity **List** subpanel. Once Create New menu is clicked, an Opportunity Management window will pop up for user to create a New Opportunity. Enter the details of the Opportunity and click Save button to create the New Opportunity.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

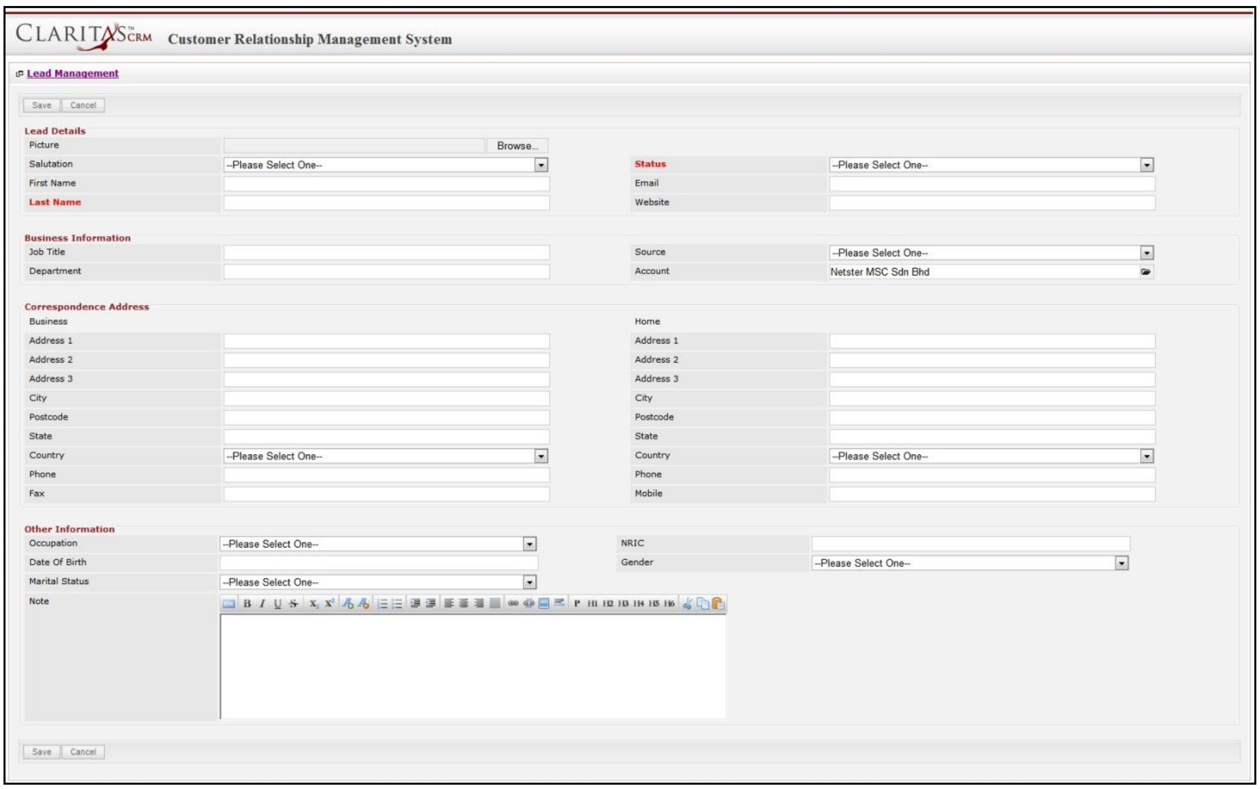


Figure 2.56: New Opportunity Management Popup

Compulsory fields: **Last Name** and **Status**.

There are **four** main sections to be filled in to create a new Opportunity: **Lead Profile**, **Business Information**, **Correspondence Address** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Opportunity Details**

- Compulsory fields: **Opportunity Name**, **Account**, **Sales Status**, **Probability**, **Amount** and **Expected Close Date**.

Figure 2.57: Create Opportunity - Opportunity Details

- **Opportunity Name** field will be the Opportunity Name for identification.
- **Account** field is to assign the Opportunity to the related Account. There are two ways of entering the **Account** field:
  i. Type in the Company Name and wait for the **auto-complete** dropdown of the Account, if the name entered does not match any of the available accounts; the textbox will be auto-cleared. (Click at the Company Name to select the account) **OR**

Figure 2.58: Account Field Auto Complete Dropdown

  ii. Click at the button to open a new popup containing the list of all Accounts. (Click at the Company Name hyperlink to select the account)

Figure 2.59: Account Popup

- **Status** field is the status of the Campaign created; Options available are: **Prospecting**, **Qualification**, **Value Proposition**, **Proposal/Quotation**, **Negotiation**, **Closed Won** or **Closed Lost**.
- **Probability** field is for user to enter the probability that the opportunity will be having.
- **Amount** field is for user to enter the amount that the opportunity will be having.
- **Expected Close Date** field when clicked will populate a calendar for user to select the date for the Opportunity. Click at the **Month** and **Year** dropdown to navigate to the selected date.

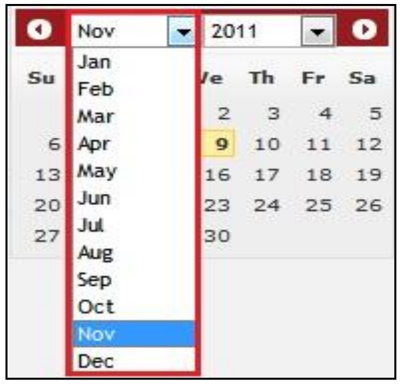


Figure 2.60: Expected Close Date

2) **Other Information**

   a. For user to enter some description or additional information regarding the opportunity. (Optional)

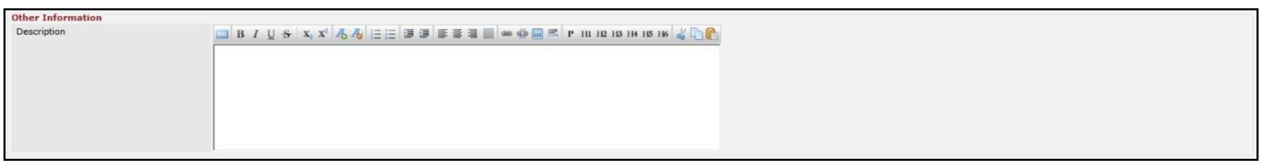


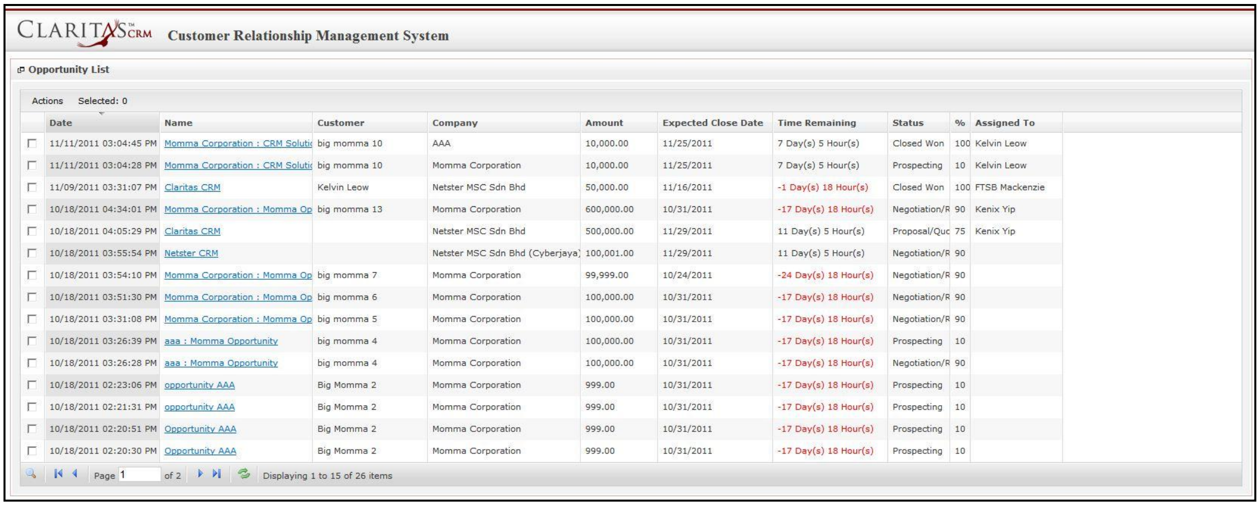
Figure 2.61: Create Opportunity - Other Information

To **cancel creating New Opportunity**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Opportunity and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Opportunity.

Select Opportunity

To select an **Opportunity** to this **Acount**, click at the Select menu. Once Select menu is clicked, a **Lead List** window will pop up for user to select an **Account**. Click at the <u>Name</u> hyperlink in **Name column** to select the **Opportunity** that associate with this **Account**.



Customer Relationship Management System

Opportunity List

Actions Selected: 0

Date	Name	Customer	Company	Amount	Expected Close Date	Time Remaining	Status	%	Assigned To
11/11/2011 03:04:45 PM	Momma Corporation : CRM Soluti	big momma 10	AAA	10,000.00	11/25/2011	7 Day(s) 5 Hour(s)	Closed Won	100	Kelvin Leow
11/11/2011 03:04:28 PM	Momma Corporation : CRM Soluti	big momma 10	Momma Corporation	10,000.00	11/25/2011	7 Day(s) 5 Hour(s)	Prospecting	10	Kelvin Leow
11/09/2011 03:31:07 PM	Claritas CRM	Kelvin Leow	Netster MSC Sdn Bhd	50,000.00	11/16/2011	-1 Day(s) 18 Hour(s)	Closed Won	100	FTSB Mackenzie
10/18/2011 04:34:01 PM	Momma Corporation : Momma Op	big momma 13	Momma Corporation	600,000.00	10/31/2011	-17 Day(s) 18 Hour(s)	Negotiation/R	90	Kenix Yip
10/18/2011 04:05:29 PM	Claritas CRM		Netster MSC Sdn Bhd	500,000.00	11/29/2011	11 Day(s) 5 Hour(s)	Proposal/Quc	75	Kenix Yip
10/18/2011 03:55:54 PM	Netster CRM		Netster MSC Sdn Bhd (Cyberjaya)	100,001.00	11/29/2011	11 Day(s) 5 Hour(s)	Negotiation/R	90	
10/18/2011 03:54:10 PM	Momma Corporation : Momma Op	big momma 7	Momma Corporation	99,999.00	10/24/2011	-24 Day(s) 18 Hour(s)	Negotiation/R	90	
10/18/2011 03:51:30 PM	Momma Corporation : Momma Op	big momma 6	Momma Corporation	100,000.00	10/31/2011	-17 Day(s) 18 Hour(s)	Negotiation/R	90	
10/18/2011 03:31:08 PM	Momma Corporation : Momma Op	big momma 5	Momma Corporation	100,000.00	10/31/2011	-17 Day(s) 18 Hour(s)	Negotiation/R	90	
10/18/2011 03:26:39 PM	aaa : Momma Opportunity	big momma 4	Momma Corporation	100,000.00	10/31/2011	-17 Day(s) 18 Hour(s)	Prospecting	10	
10/18/2011 03:26:28 PM	aaa : Momma Opportunity	big momma 4	Momma Corporation	100,000.00	10/31/2011	-17 Day(s) 18 Hour(s)	Negotiation/R	90	
10/18/2011 02:23:06 PM	opportunity AAA	Big Momma 2	Momma Corporation	999.00	10/31/2011	-17 Day(s) 18 Hour(s)	Prospecting	10	
10/18/2011 02:21:31 PM	opportunity AAA	Big Momma 2	Momma Corporation	999.00	10/31/2011	-17 Day(s) 18 Hour(s)	Prospecting	10	
10/18/2011 02:20:51 PM	Opportunity AAA	Big Momma 2	Momma Corporation	999.00	10/31/2011	-17 Day(s) 18 Hour(s)	Prospecting	10	
10/18/2011 02:20:30 PM	Opportunity AAA	Big Momma 2	Momma Corporation	999.00	10/31/2011	-17 Day(s) 18 Hour(s)	Prospecting	10	

Page 1 of 2 Displaying 1 to 15 of 26 items

Figure 2.62: Select Opportunity Popup

Account – Contracts Subpanel

This subpanel contains any Contract related to the **Account**.

Create New Contract

To create a New Contract related to an Account, click at the Create New menu at **Contracts** subpanel. Once Create New menu is clicked, a Contract Management window will pop up for user to create a New Contract. Enter the details of the Contract and click Save button to create the New Contract.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

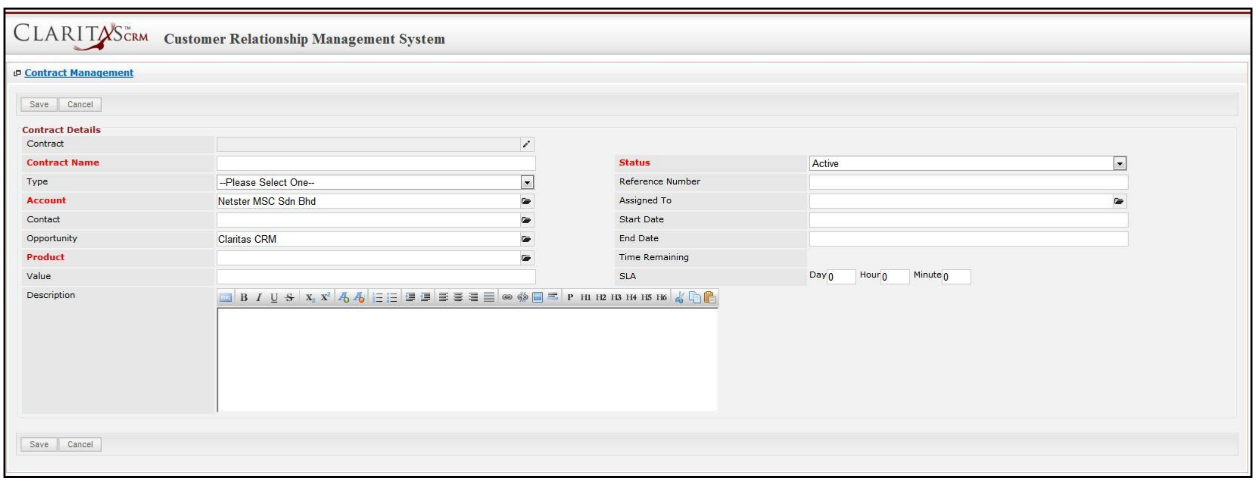


Figure 2.63: New Contract Management Popup

- Compulsory fields: **Contract Name**, **Account**, **Product** and **Status**.

- **Contract Name** field is the name of the Contract;
- **Account** field will auto populate the name of the related **Account** (if available).
- **Contact, Account** and **Product** field are to select or enter the related Contact, Account and Product to the Contract. These fields will only be enabled once the **Account** field is filled in. There are two ways of entering the **Product** field:
    i. Type in the Product Name and wait for the **auto-complete** dropdown of the Product; if the name entered does not match any of the available products; the textbox will be auto-cleared. (Click at the Product name to select the product) **OR**

Figure 2.64: Product Field Auto Complete Dropdown

    ii. Click at the button to open a new popup containing the list of all Products. (Click at the Product Name hyperlink to select the product)

Figure 2.65: Product Listing Popup

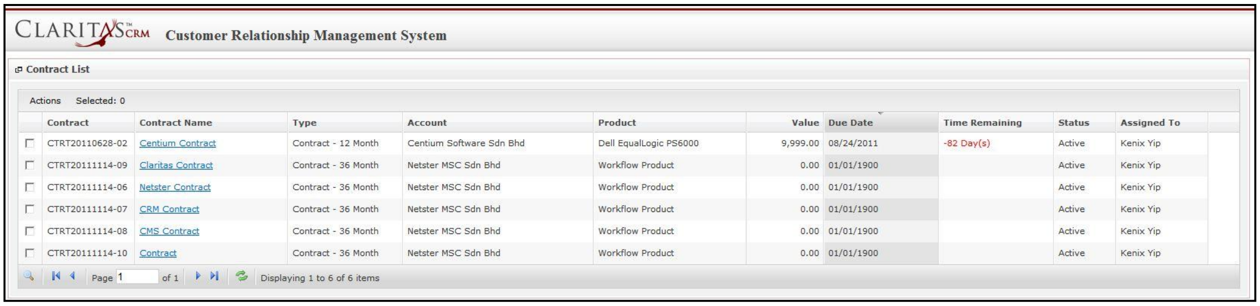
- **Status** field is the status of the Contract; the options for Status are: **Active** and **Inactive**.

To **cancel creating New Contract**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Contract and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Contract.

Select Contract

To select a **Contract** to this **Account**, click at the Select menu. Once Select menu is clicked, a **Contract List** window will pop up for user to select a **Contract**. Click at the **Contract Name** hyperlink in **Contract Name** column to select the **Contract** that associate with this **Account**.



CLARITAS CRM Customer Relationship Management System

Contract List

Actions Selected: 0

	Contract	Contract Name	Type	Account	Product	Value	Due Date	Time Remaining	Status	Assigned To
☐	CTRT20110628-02	Centium Contract	Contract - 12 Month	Centium Software Sdn Bhd	Dell EqualLogic PS6000	9,999.00	08/24/2011	-82 Day(s)	Active	Kenix Yip
☐	CTRT20111114-09	Claritas Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
☐	CTRT20111114-06	Netster Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
☐	CTRT20111114-07	CRM Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
☐	CTRT20111114-08	CMS Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
☐	CTRT20111114-10	Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip

Page 1 of 1 Displaying 1 to 6 of 6 items

Figure 2.66: Select Contract Popup

Account – Cases Subpanel

This subpanel contains any Cases related to the **Account**.

Create New Case

To create a New Case related to an Account, click at the Create New menu at **Issue** subpanel. Once Create New menu is clicked, a Case Management window will pop up for user to create a New Case. Enter the details of the Case and click Save button to create the New Case.

There are **three** main sections to be filled in to create a new Case: **Case Details**, **Customer Feedback Form**, and **Case Resolution.**

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

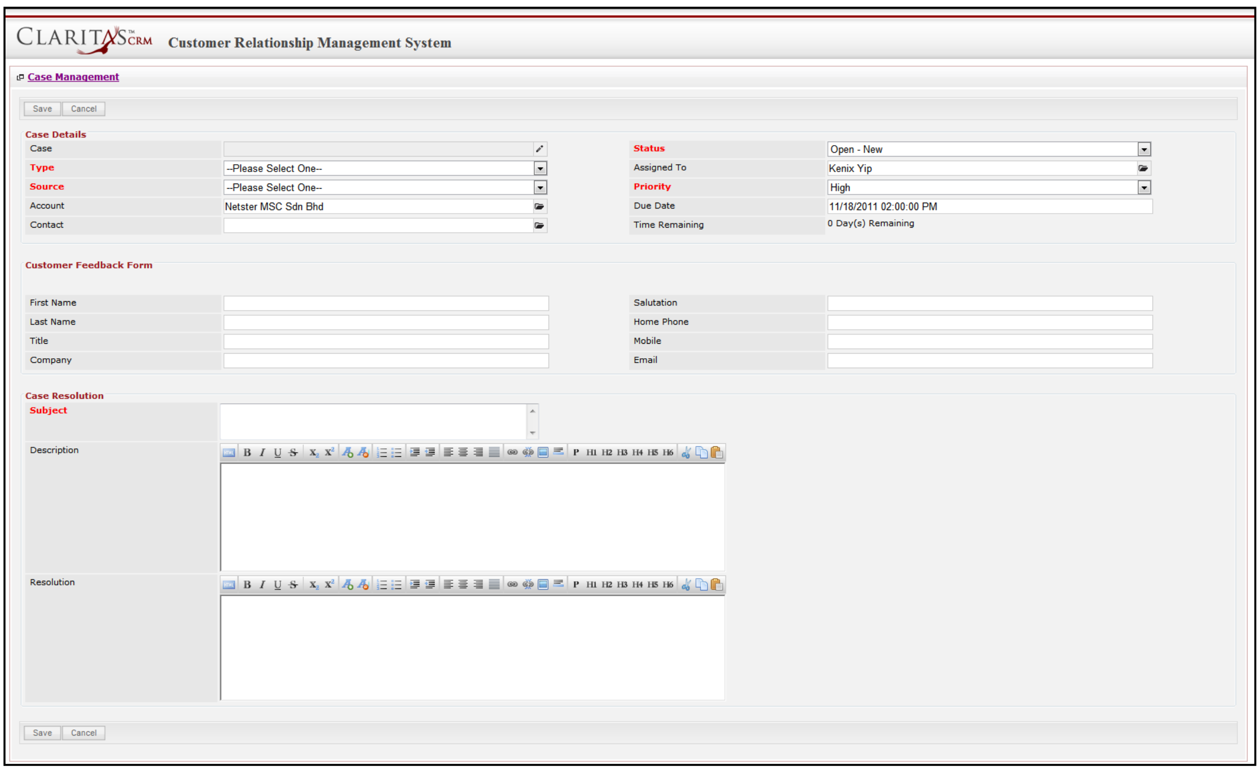


Figure 2.67: New Issue Management Popup

1) **Case Details**

- Compulsory fields: **Type**, **Source**, **Status**, and **Priority**.

Figure 2.68: Create Case - Case Details

- **Type** field is the type of the case; Options will be **Comment**, **Complaint**, **Compliment**, **Enquiry**, **Suggestion**, **Support** or **Other**.
- **Source** field is the source of the case created; Options available are: **Call**, **Email**, **Fax**, **Letter**, **Walk In**, **Web** or **Other**.
- **Status** field is the status of the case created; Options available are: **Open – New**, **Open – Assigned**, **Closed**, **Closed – Rejected**, **Closed – Duplicate** or **Closed – KIV**.
- **Priority** field is the priority of the case created; Options available are: **High**, **Medium** or **Low**.
- **Due Date** field when clicked will populate a calendar for user to select the date and time for the Case. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Case is created. Click at the Done menu to set the date and time.

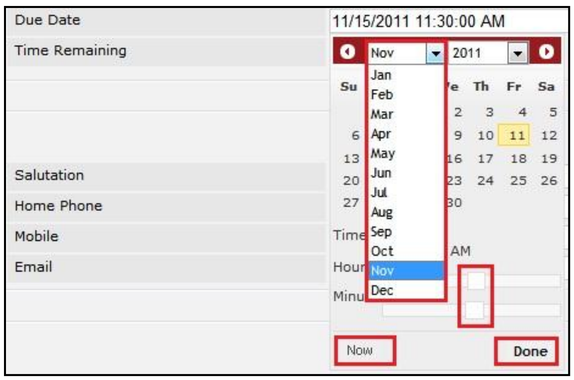


Figure 2.69: Due Date Time

- Once the Due Date is selected, **Time Remaining** field will auto-populate the remaining time (in day(s)) for the case.

2) **Customer Feedback Form**

- For user to enter the related Customer Details

Figure 2.70: Create Case – Customer Feedback Form

3) **Case Information**

- Compulsory fields: **Subject**.
- For user to enter the related Case Subject, Case Description and Resolution.

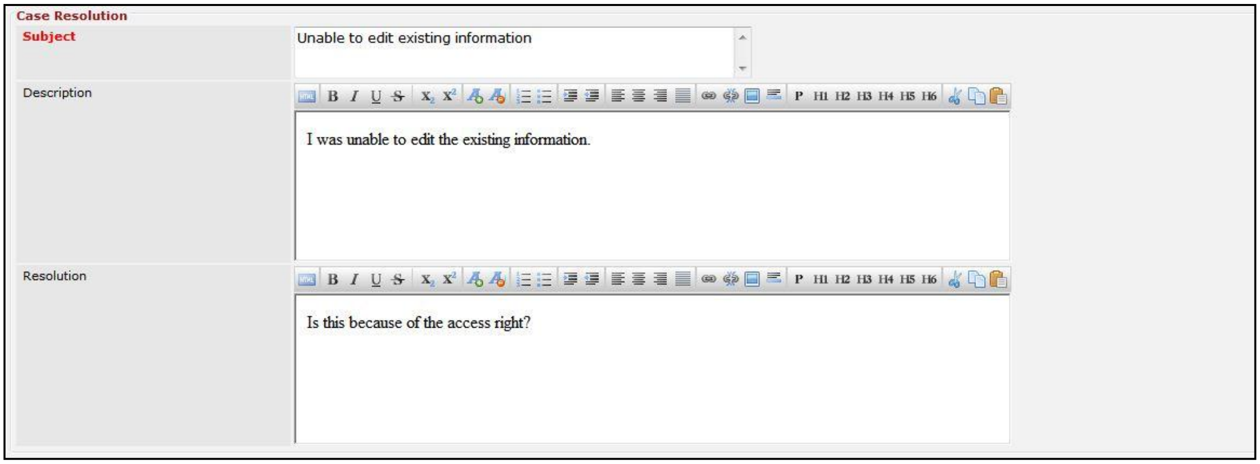


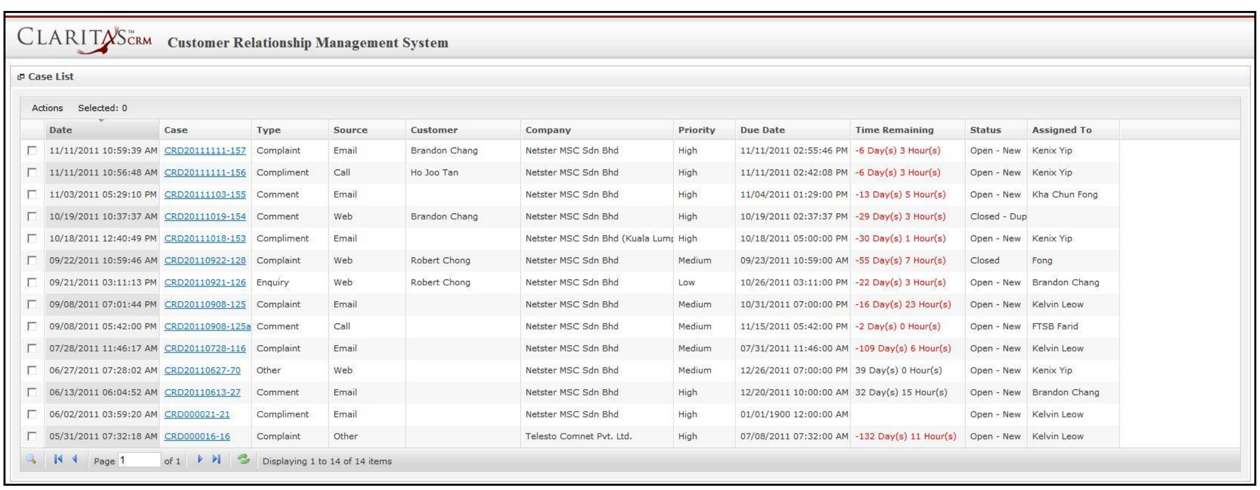
Figure 2.71: Create Contact – Case Resolution

To **cancel creating New Issue**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Issue and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Issue.

Select Issue

To select an **Issue** to this **Case**, click at the Select menu. Once Select menu is clicked, an **Issue List** window will pop up for user to select an **Issue**. Click at the **Issue Name** hyperlink in **Issue Name** column to select the **Issue** that associate with this **Case**.



Date	Case	Type	Source	Customer	Company	Priority	Due Date	Time Remaining	Status	Assigned To
11/11/2011 10:59:39 AM	CRD20111111-157	Complaint	Email	Brandon Chang	Netster MSC Sdn Bhd	High	11/11/2011 02:55:46 PM	-6 Day(s) 3 Hour(s)	Open - New	Kenix Yip
11/11/2011 10:56:48 AM	CRD20111111-156	Compliment	Call	Ho Joo Tan	Netster MSC Sdn Bhd	High	11/11/2011 02:42:08 PM	-6 Day(s) 3 Hour(s)	Open - New	Kenix Yip
11/03/2011 05:29:10 PM	CRD20111103-155	Comment	Email		Netster MSC Sdn Bhd	High	11/04/2011 01:29:00 PM	-13 Day(s) 5 Hour(s)	Open - New	Kha Chun Fong
10/19/2011 10:37:37 AM	CRD20111019-154	Comment	Web	Brandon Chang	Netster MSC Sdn Bhd	High	10/19/2011 02:37:37 PM	-29 Day(s) 3 Hour(s)	Closed - Dup	
10/18/2011 12:40:49 PM	CRD20111018-153	Compliment	Email		Netster MSC Sdn Bhd (Kuala Lum	High	10/18/2011 05:00:00 PM	-30 Day(s) 1 Hour(s)	Open - New	Kenix Yip
09/22/2011 10:59:46 AM	CRD20110922-128	Complaint	Web	Robert Chong	Netster MSC Sdn Bhd	Medium	09/23/2011 10:59:00 AM	-55 Day(s) 7 Hour(s)	Closed	Fong
09/21/2011 03:11:13 PM	CRD20110921-126	Enquiry	Web	Robert Chong	Netster MSC Sdn Bhd	Low	10/26/2011 03:11:00 PM	-22 Day(s) 3 Hour(s)	Open - New	Brandon Chang
09/08/2011 07:01:44 PM	CRD20110908-125	Complaint	Email		Netster MSC Sdn Bhd	Medium	10/31/2011 07:00:00 PM	-16 Day(s) 23 Hour(s)	Open - New	Kelvin Leow
09/08/2011 05:42:00 PM	CRD20110908-125a	Comment	Call		Netster MSC Sdn Bhd	Medium	11/15/2011 05:42:00 PM	-2 Day(s) 0 Hour(s)	Open - New	FTSB Farid
07/28/2011 11:46:17 AM	CRD20110728-116	Complaint	Email		Netster MSC Sdn Bhd	Medium	07/31/2011 11:46:00 AM	-109 Day(s) 6 Hour(s)	Open - New	Kelvin Leow
06/27/2011 07:28:02 AM	CRD20110627-70	Other	Web		Netster MSC Sdn Bhd	Medium	12/26/2011 07:00:00 PM	39 Day(s) 0 Hour(s)	Open - New	Kenix Yip
06/13/2011 06:04:52 AM	CRD20110613-27	Comment	Email		Netster MSC Sdn Bhd	High	12/20/2011 10:00:00 AM	32 Day(s) 15 Hour(s)	Open - New	Brandon Chang
06/02/2011 03:59:20 AM	CRD000021-21	Compliment	Email		Netster MSC Sdn Bhd	High	01/01/1900 12:00:00 AM		Open - New	Kelvin Leow
05/31/2011 07:32:18 AM	CRD000016-16	Complaint	Other		Telesto Comnet Pvt. Ltd.	High	07/08/2011 07:32:00 AM	-132 Day(s) 11 Hour(s)	Open - New	Kelvin Leow

Figure 2.72: Select Issue Popup

3 General – Contact

This module is to **create and store Contact details**.

Contact Listing

To view Contact Listing, click at the **General > Contact** menu at the Main Menu bar.

Figure 3.1: Contact Menu in Main Menu

Page will load the list of the Contact available in the system.

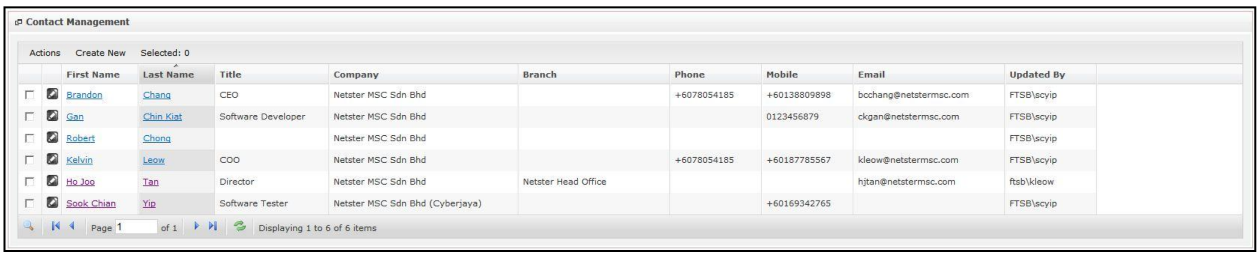


Figure 3.2: Contact Listing

To view the Contact Details, click at the <u>Company Name</u> hyperlink in Company column.

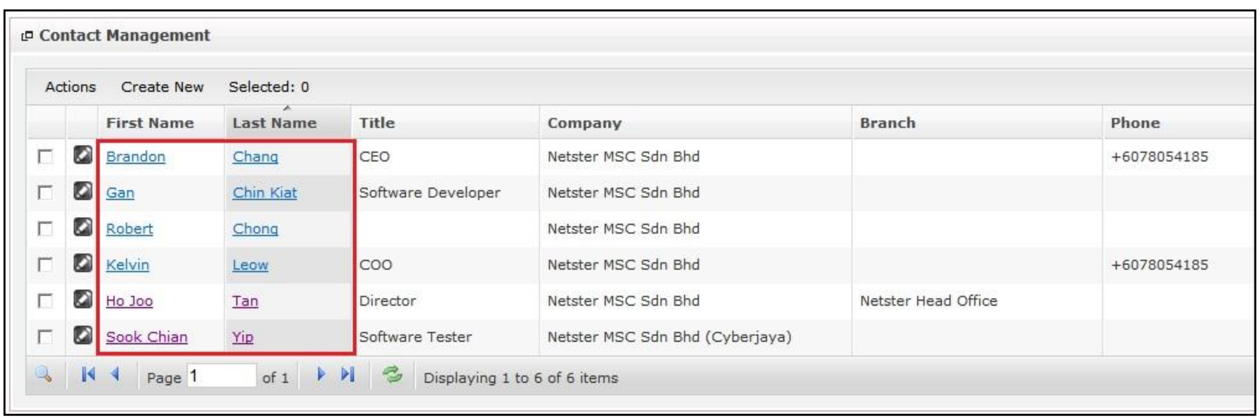


Figure 3.3: First Name and Last Name Hyperlink

After clicking the <u>First Name</u> and <u>Last Name</u> hyperlink, page will navigate to the **Contact Management Detail** page which displays all the details of the Contact.

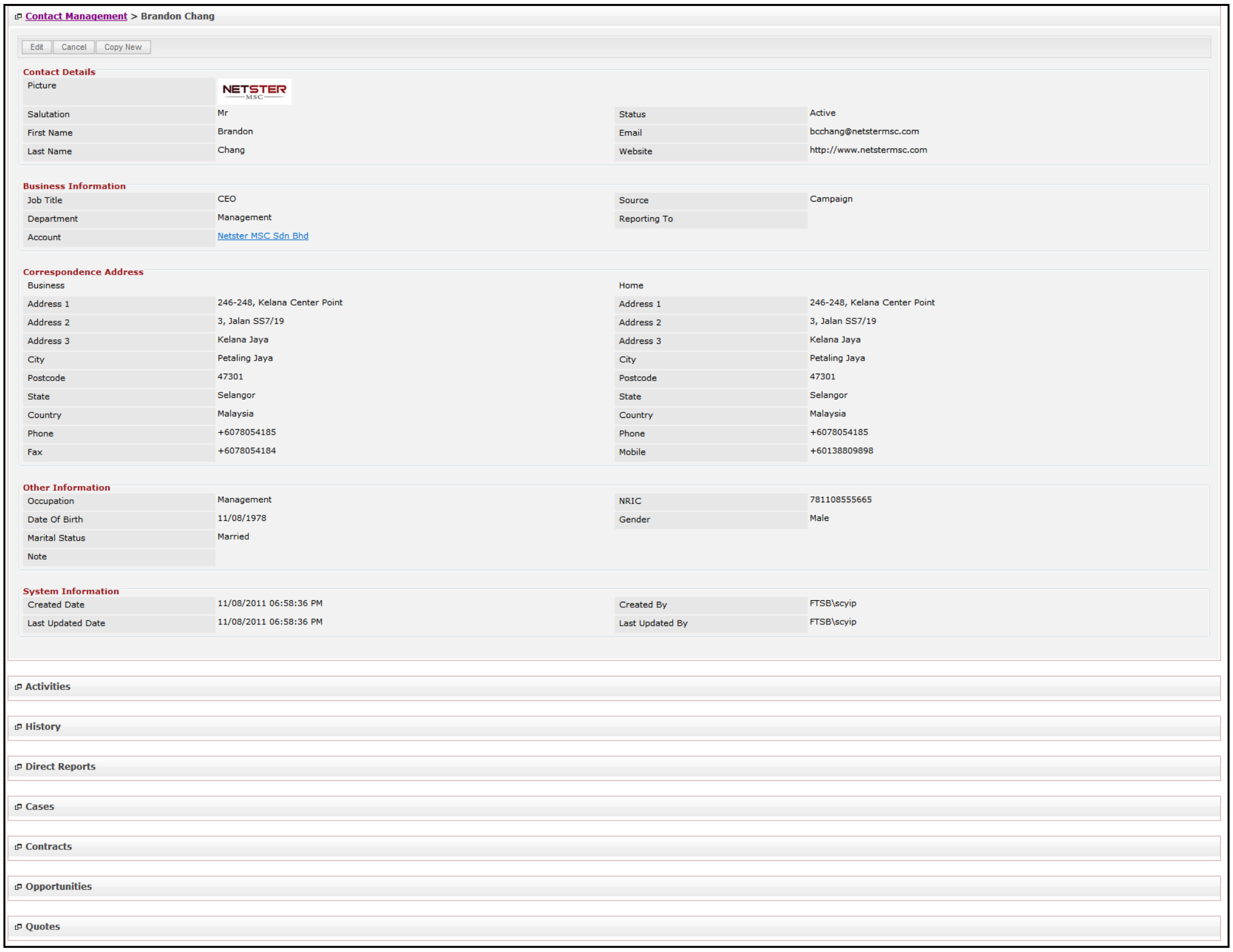


Figure 3.4: Contact Management Detail Page

To copy the entire record and save as a new record, click Copy New button at **Contact Maintenance Detail** page.

To create a new Contact, click at Create New menu at the top of the Contact Listing.

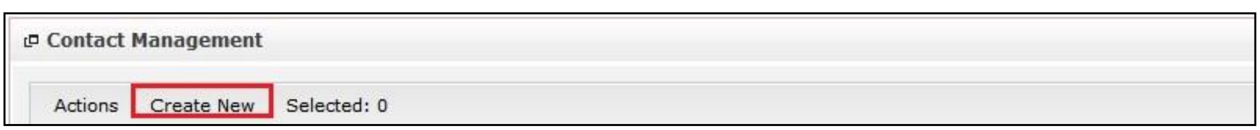


Figure 3.5: Create New Contact Menu

After clicking Create New menu, page will navigate to **Contact Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Contact Management Detail** page or click Cancel button to cancel creating and navigates back to the **Contact Listing** page.

***Related Topics**: See "Create New Contact"*

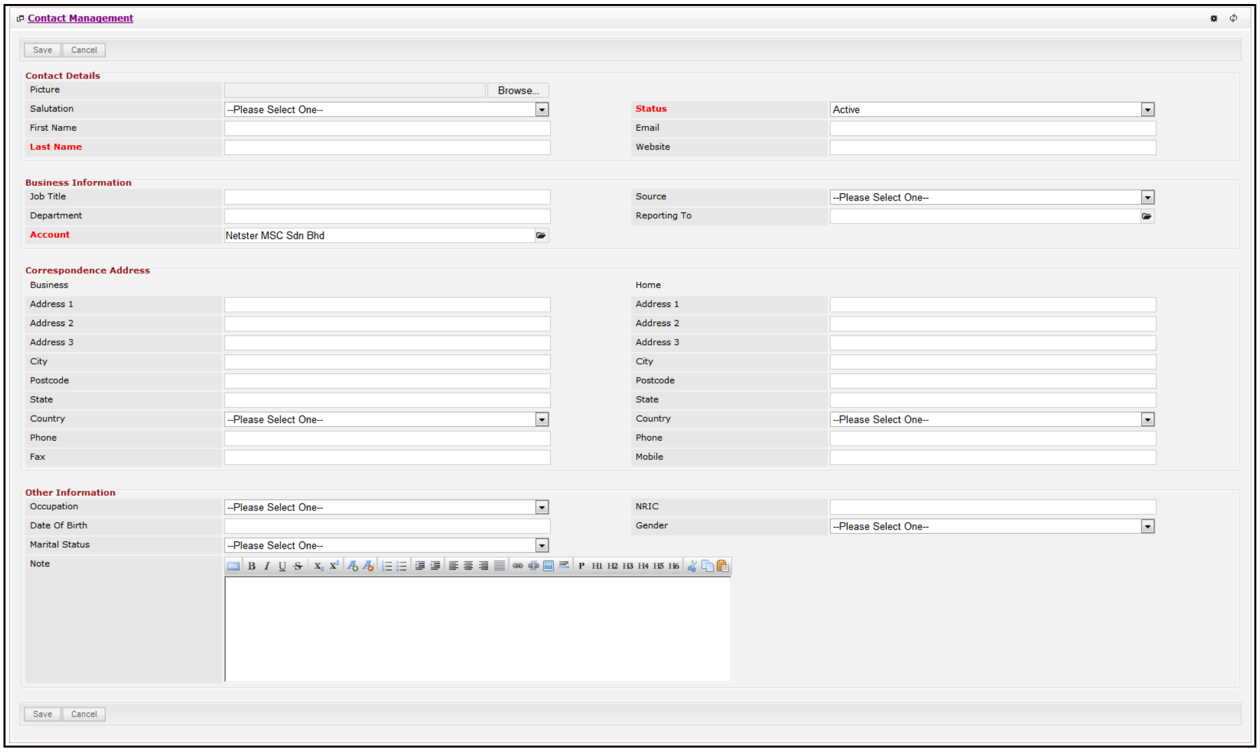


Figure 3.6: Contact Management Create New Page

To **delete** a Contact, select the record and click **Actions > Delete**.

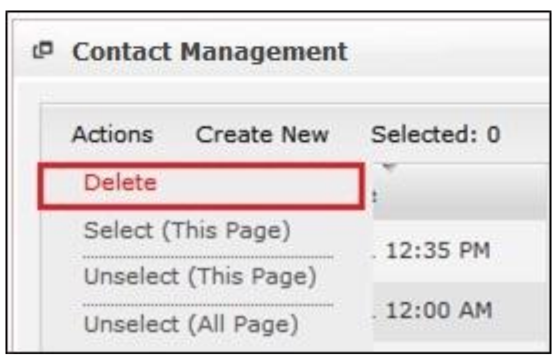


Figure 3.7: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 3.8: Message Showing Contact Deleted Successfully

Deleted Contact will **no longer** be displayed in Contact Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

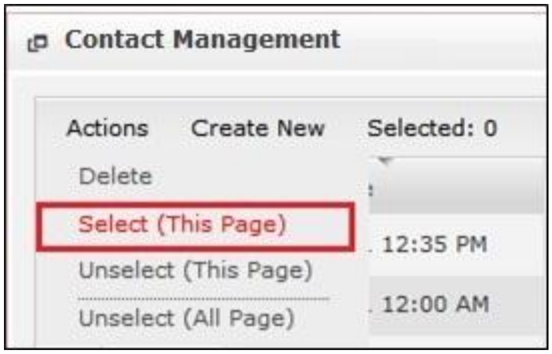


Figure 3.9: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

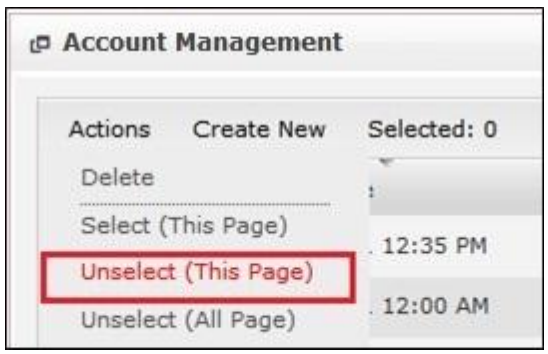


Figure 3.10: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

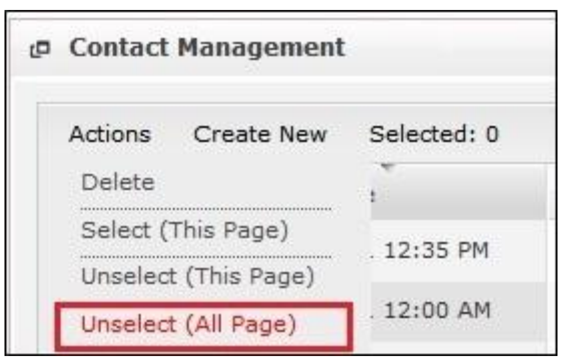


Figure 3.11: Actions > Unselect (All Pages) Menu

To go to the First Page of the listing, click at the **First Page** button.

To go to the Previous Page of the listing, click at the **Previous Page** button.

To go to the Next Page of the listing, click at the **Next Page** button.

To go to the Last Page of the listing, click at the **Last Page** button.

To refresh the listing page, click at the **Refresh** button.

To search for record/s, click at the **Search** button. An **Advance Search** section will expand at the bottom of the listing for user to select the search field and enter search value.

Figure 3.12: Contact Advance Search

To edit the details of the Contact, click at the **Edit** button or click the Edit button in **Contact Management Detail** page. After clicking at the **Edit** button page will navigate to the **Contact Management Edit** page.

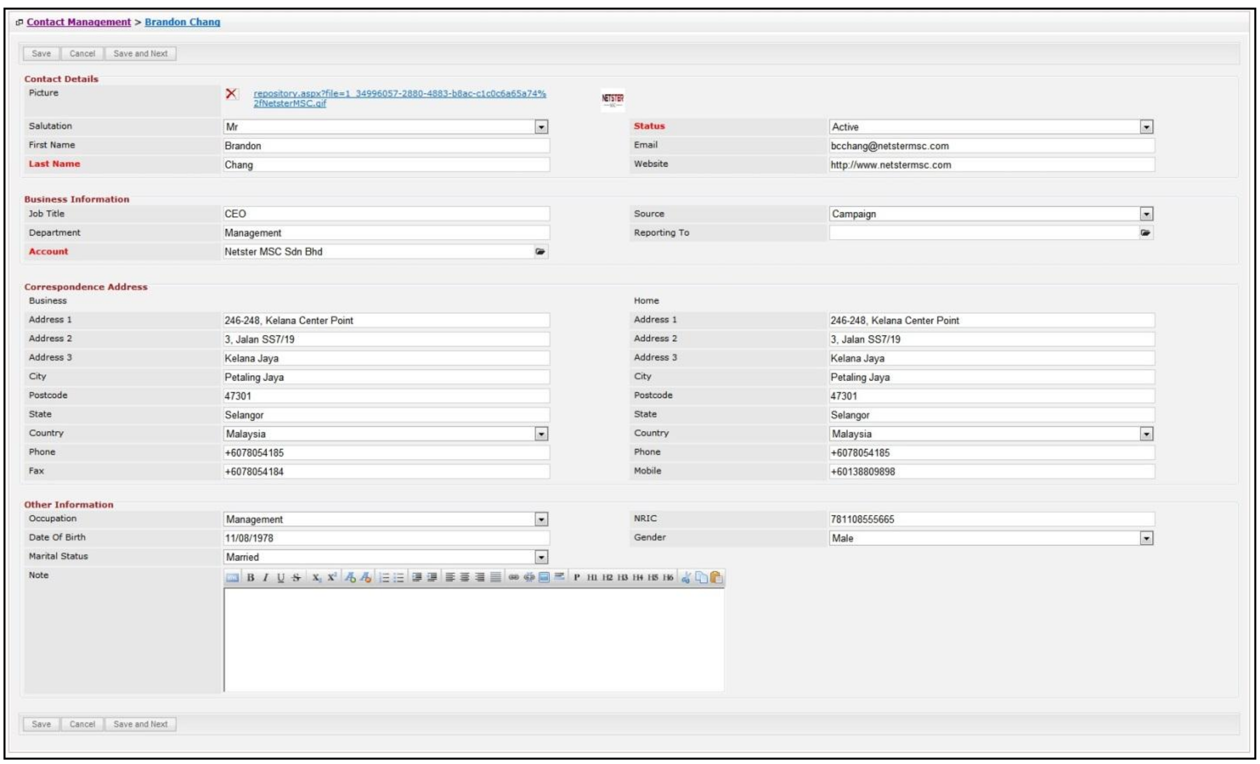


Figure 3.13: Contact Management Edit Page

Edit the relevant details and click Save button to save the changes and navigates back to **Contact Management Detail** page. Or click Cancel button to cancel editing and navigates back to the **Contact Management Detail** page.

Related Topics*: See "*[*Edit Contact*]()*"*

Create New Contact

To create new Contact, click at the **General > Contact** menu at the Main Menu bar. Then click the Create New menu at the top of the **Contact Listing**. After clicking Create New menu, page will navigate to **Contact Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Contact Management Detail** page.

There are **four** main sections to be filled in to create a new Contact: **Contact Profile**, **Business Information**, **Correspondence Address** and **Other Information**.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

4) **Contact Details**

- Compulsory fields: **Last Name** and **Status**

Figure 3.14: Create Contact – Contact Details

- **Last Name** field will be the last name of the user for identification.
- **Status** field defines if the status of the user is **Active** or **Inactive**.

5) **Business Information**

- Compulsory fields: **Last Name** and **Status**
- For user to enter some **Business Information** of the user such as **Job Title**, **Department**, **Source** and **Reporting To**.

Figure 3.15: Create Contact – Password

6) **Correspondence Address**

- For user to enter some **Correspondence Address** of the user – Home Address and Business Address. (Optional)

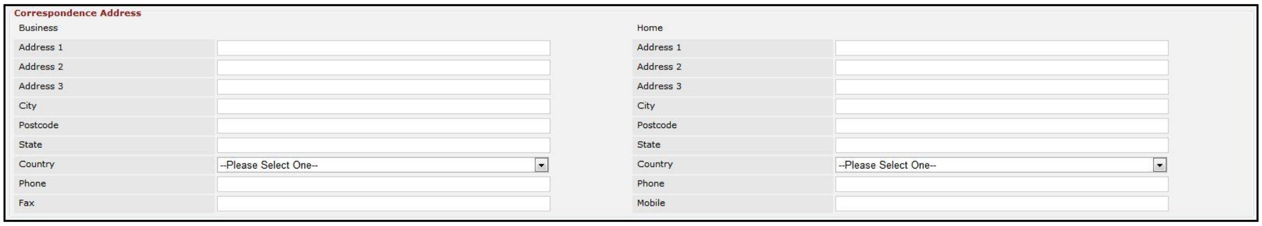


Figure 3.16: Create Contact – Correspondence Address

7) **Other Information**

- For user to enter some **Other Information** of the user such as **Occupation**, **Date of Birth**, **Marital Status**, **NRIC**, **Gender** and **Note**. (Optional)

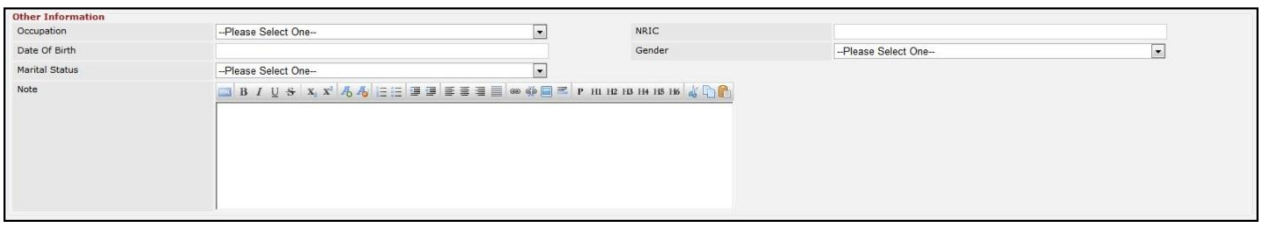


Figure 3.17: Create Contact – Other Information

To **cancel creating New Contact**, click Cancel button. Page will navigate back to **Contact Listing** page.

Edit Contact

To edit Contact details, click at the **General > Contact** menu at the Main Menu bar. Click at the **Edit** button in **Contact Listing** page or click at the Name hyperlink in **Contact Listing** page then click the Edit button in **Contact Management Detail** page. After clicking the **Edit** button or Edit button, page will navigate to **Contact Management Edit** page. Edit the relevant details and click Save button to save the changes and navigates back to **Contact Management Detail** page or click Save and Next button to save the changes and navigates to the **Contact Management Edit page** for the next record.

There are **four** sections to be filled in to be edited: **Contact Profile**, **Business Information**, **Correspondence Address** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Contact Details**

- Compulsory fields: **Last Name** and **Status**

Figure 3.18: Create Contact – Contact Details

- **Last Name** field will be the last name of the user for identification.
- **Status** field defines if the status of the user is **Active** or **Inactive**.

2) **Business Information**

- Compulsory fields: **Last Name** and **Status**
- For user to enter some **Business Information** of the user such as **Job Title**, **Department**, **Source** and **Reporting To**.

Figure 3.19: Create Contact – Password

3) **Correspondence Address**

- For user to enter some **Correspondence Address** of the user – Home Address and Business Address. (Optional)

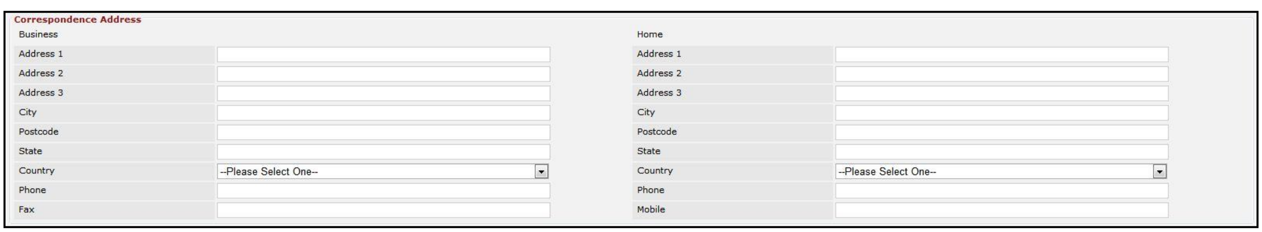


Figure 3.20: Create Contact – Correspondence Address

4) **Other Information**

- For user to enter some **Other Information** of the user such as **Occupation**, **Date of Birth**, **Marital Status**, **NRIC**, **Gender** and **Note**. (Optional)

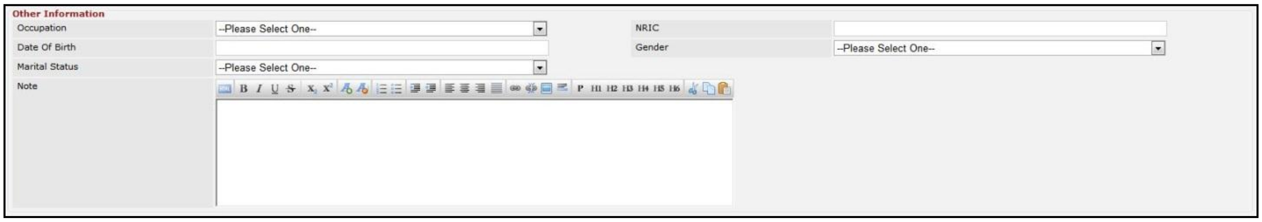


Figure 3.21: Create Contact – Other Information

To **cancel editing New Contact**, click Cancel button at **Contact Management Detail** page. Page will navigate back to **Contact Listing** page.

Contact – Activities Subpanel

This subpanel contains any activities related to the Contact. **Call**, **Meeting** and **Task** created will be displayed in this **Activities** subpanel.

Contact – Activities Subpanel (New Call)

To create a New Call related to a Contact, click at the New Call menu at **Activities** subpanel. Once New Call menu is clicked, a Call Management window will pop up for user to create a New Call. Enter the details of the Call and click Save button to create the New Call. Or click Cancel menu to cancel creating New Call.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

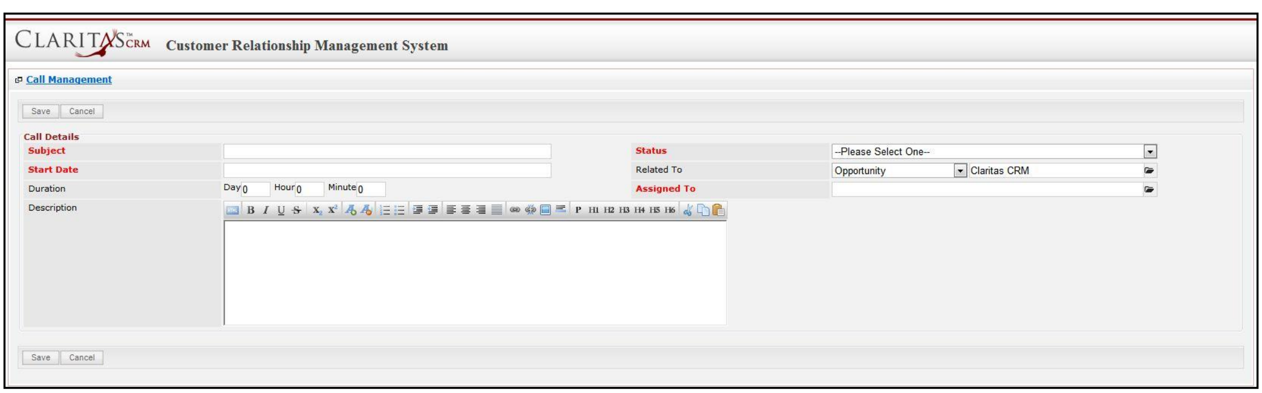


Figure 3.22: New Call Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Contact**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Call. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Call is created. Click at the Done menu to set the date and time.

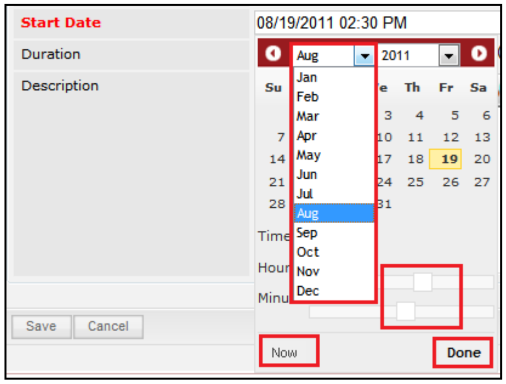


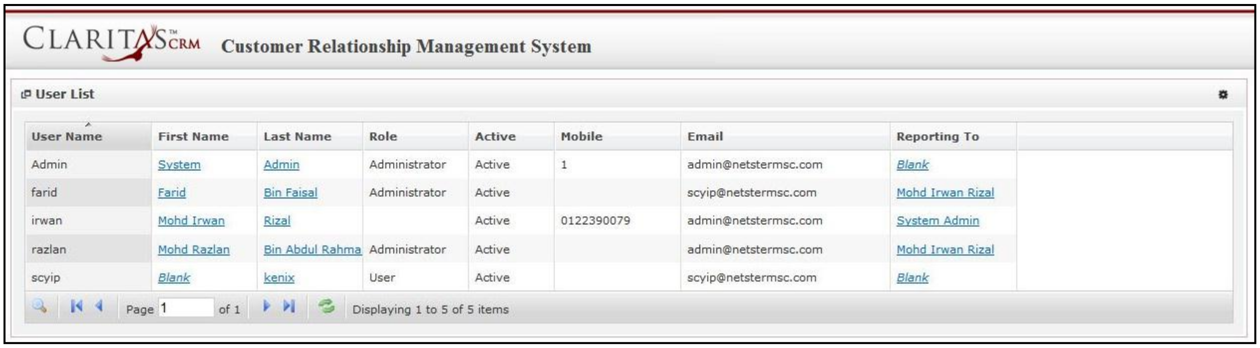
Figure 3.23: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Call for the related Contact. There are two ways of entering the Assigned To field:

iii. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 3.24: Assigned To Field Auto Complete Dropdown

iv. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



CLARITAS CRM Customer Relationship Management System

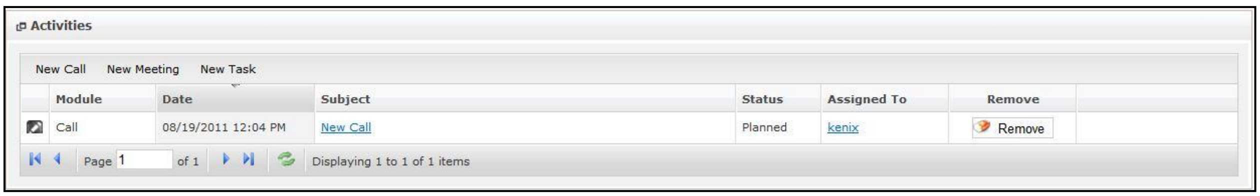
User List

User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 3.25: Assigned To Popup

- After a New Call is created, the subpanel will auto-refresh and display the newly-created Call.



Activities

New Call New Meeting New Task

Module	Date	Subject	Status	Assigned To	Remove
Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Page 1 of 1 Displaying 1 to 1 of 1 items

Figure 3.26: Activities Subpanel List New Call

To **cancel creating New Call**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Call and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Call.

Contact – Activities Subpanel (New Meeting)

To create a New Meeting related to an Contact, click at the New Meeting menu at **Activities** subpanel. Once New Meeting menu is clicked, a Meeting Management window will pop up for user to create a New Meeting. Enter the details of the Meeting and click Save button to create the New Meeting. Or click Cancel menu to cancel creating New Meeting.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

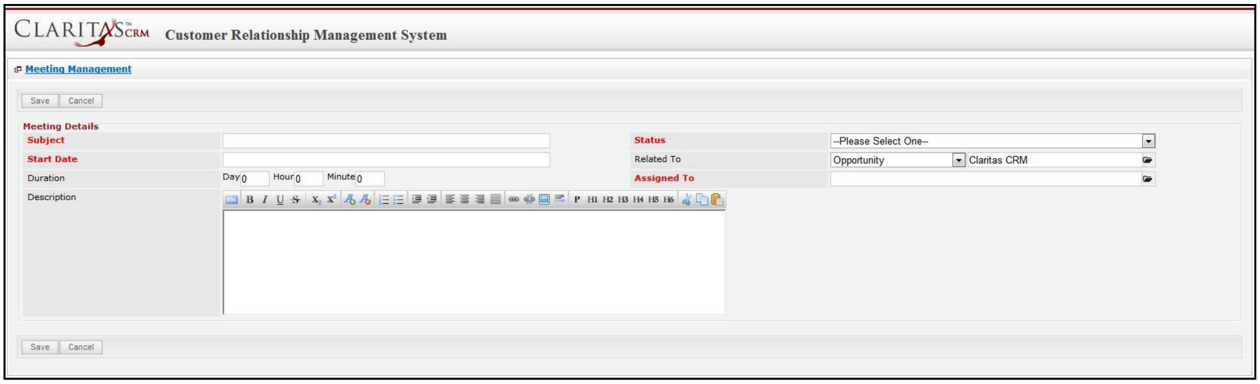


Figure 3.27: New Meeting Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Contact**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Meeting. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Meeting is created. Click at the Done menu to set the date and time.

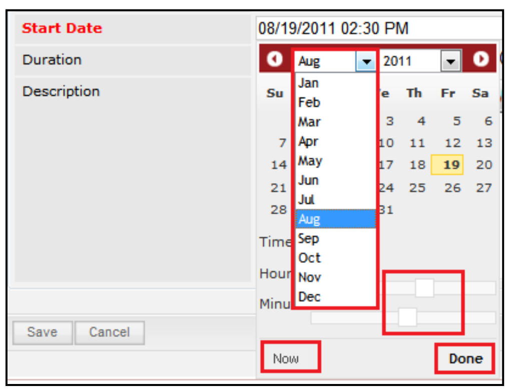


Figure 3.28: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Meeting for the related Contact. There are two ways of entering the **Assigned To** field:

  iii. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 3.29: Assigned To Field Auto Complete Dropdown

iv. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

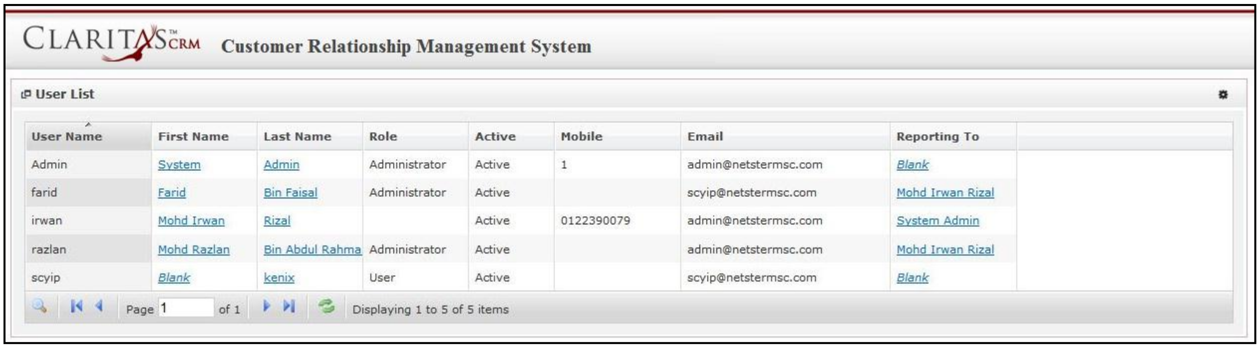


Figure 3.30: Assigned To Popup

- After a New Meeting is created, the subpanel will auto-refresh and display the newly-created Meeting.

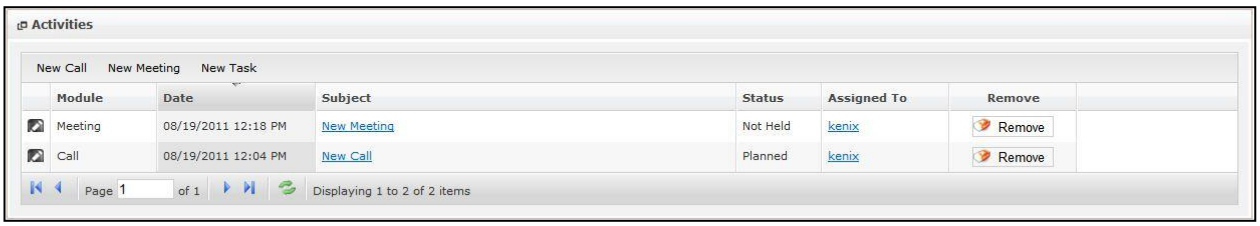


Figure 3.31: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Meeting and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Meeting.

Contact – Activities Subpanel (New Task)

To create a New Task related to an Contact, click at the New Task menu at **Activities** subpanel. Once New Task menu is clicked, a Task Management window will pop up for user to create a New Task. Enter the details of the Task and click Save button to create the New Task. Or click Cancel menu to cancel creating New Task.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

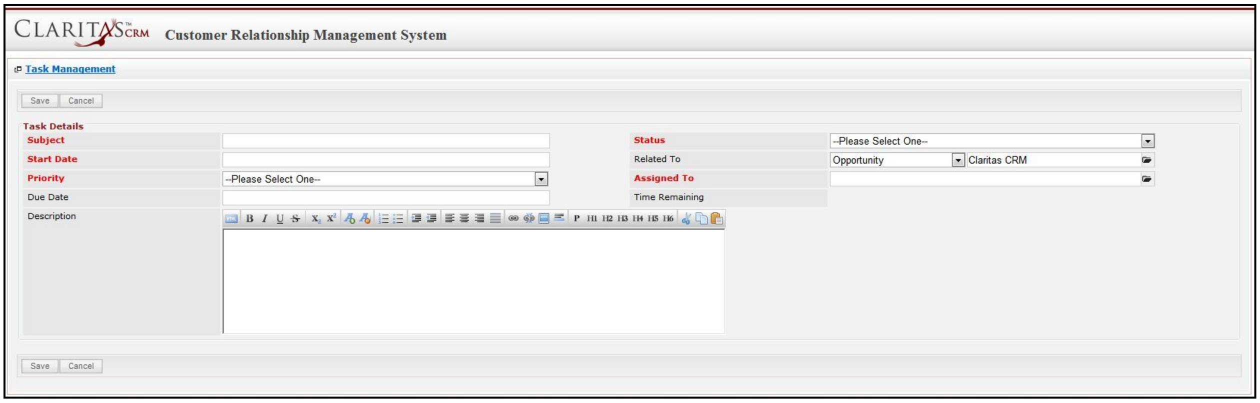


Figure 3.32: New Task Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Priority**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Contact**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Task. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Task is created. Click at the Done menu to set the date and time.

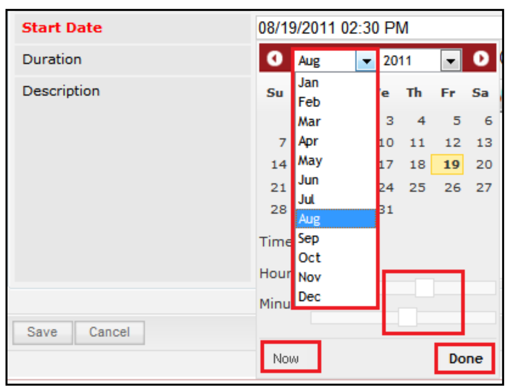


Figure 3.33: Start Date Time

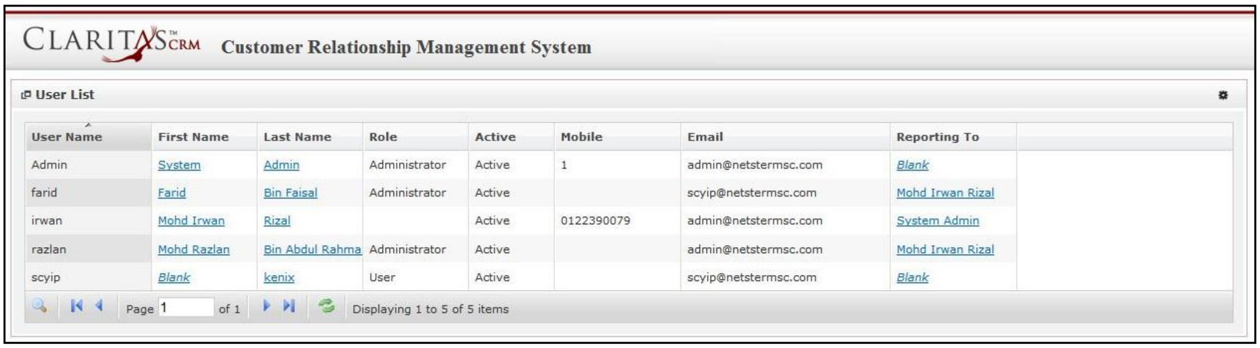
- **Priority** field once selected will auto-populate the **Due Date** field and **Time Remaining** accordingly.
- There are five **Statuses** available for Task- **Not Started**, **In Progress**, **Completed**, **Pending Input**, and **Deferred.**
- **Assigned To** field is to assign a User to in charge of the Task for the related Contact. There are two ways of entering the Assigned To field:
    iii. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available

users; the textbox will be auto-cleared. (Click at the User name to select the user)

OR

Figure 3.34: Assigned To Field Auto Complete Dropdown

iv. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

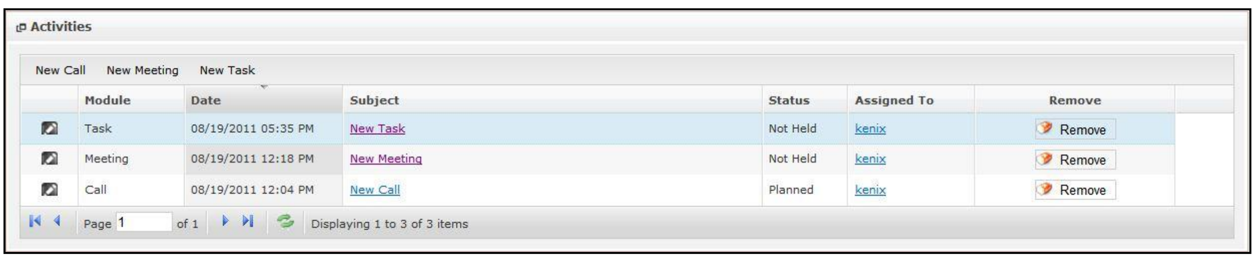


User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 3.35: Assigned To Popup

- After a New Task is created, the subpanel will auto-refresh and display the newly-created Task.



Module	Date	Subject	Status	Assigned To	Remove
Task	08/19/2011 05:35 PM	New Task	Not Held	kenix	Remove
Meeting	08/19/2011 12:18 PM	New Meeting	Not Held	kenix	Remove
Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Page 1 of 1 Displaying 1 to 3 of 3 items

Figure 3.36: Activities Subpanel List New Task

To **cancel creating New Task**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Task and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Task.

Contact – History Subpanel

This subpanel contains any history or note related to the Contact.

Contact – History Subpanel (New Note)

To create a New Note related to an Contact, click at the New Note menu at **History** subpanel. Once New Note menu is clicked, a Note Management window will pop up for user to create a New Note.

Enter the details of the Note and click Save button to create the New Note.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

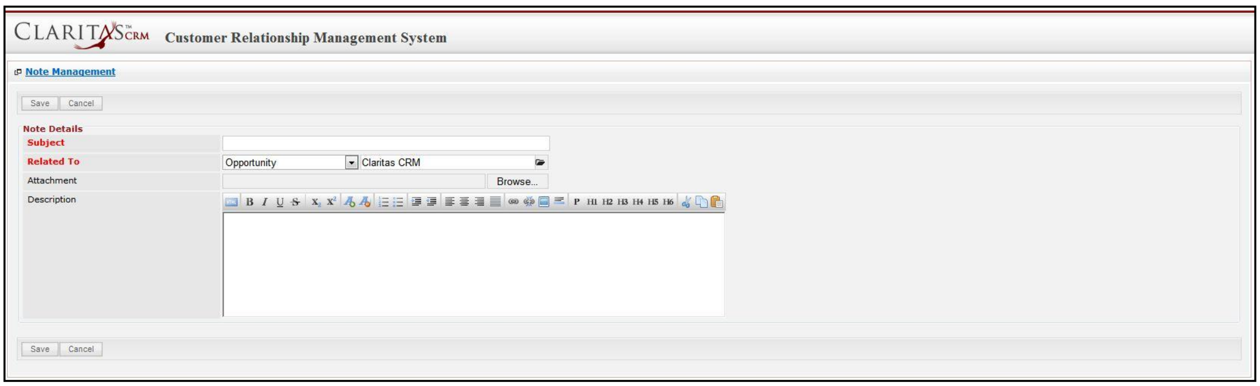


Figure 3.37: New Note Management Popup

- Compulsory fields: **Subject**, and **Related To**.
- **Related To** field will auto populate the name of the related **Contact**.
- **Attachment** field allow file extensions are as below (format that is not stated are not allowed to be uploaded):
  - **Documents:** .doc, .docx, .xls, .xlsx, . rtf, .txt, .pdf, .ppt, .pptx
  - **Pictures:** .jpg, .bmp, .png, .bmp, .gif
  - **Audio:** .mp3, .wma
  - **Video:** .3gp, .mp4, .rmvb, .avi, .flv
  - **Archive:** .zip, .rar
- After a New Note is created, the subpanel will auto-refresh and display the newly-created Note.

Figure 3.38: History Subpanel List New Note

To **cancel creating New Note**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Note and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Note.

Contact – Direct Reports Subpanel

This subpanel contains User directly report to the **Contact**.

Create New Contact

To create a New User directly report to this Contact, click at the Create New menu at **Direct Reports List** subpanel. Once Create New menu is clicked, a Contact Management window will pop up for user to create a New Contact. Enter the details of the Contact and click Save button to create the New Contact.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

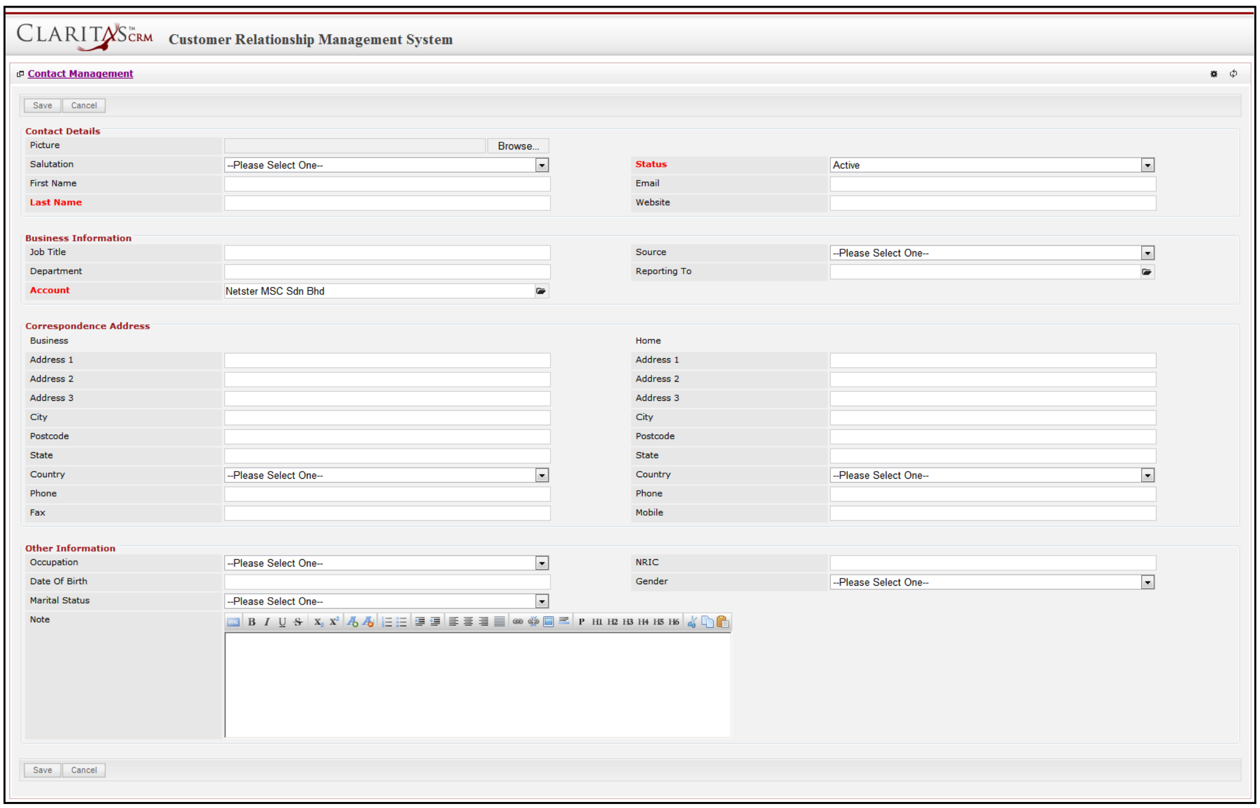


Figure 3.39: New Contact Management Popup

Compulsory fields: **Last Name**, **Status** and **Contact**.

There are **four** main sections to be filled in to create a new Contact: **Contact Profile**, **Business Information**, **Correspondence Address** and **Other Information**.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

1) **Contact Details**

- Compulsory fields: **Last Name** and **Status**

Figure 3.40: Create Contact – Contact Details

- **Last Name** field will be the last name of the user for identification.
- **Status** field defines if the status of the user is **Active** or **Inactive**.

2) **Business Information**

- Compulsory fields: **Last Name** and **Status**
- For user to enter some **Business Information** of the user such as **Job Title**, **Department**, **Source** and **Reporting To**.

Figure 3.41: Create Contact – Business Information

- **Account** field will auto populate the name of the related **Account**.

3) **Correspondence Address**

- For user to enter some **Correspondence Address** of the user – Home Address and Business Address. (Optional)

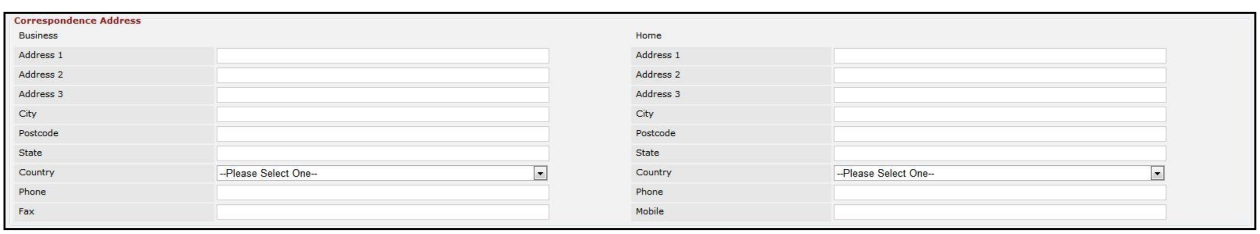


Figure 3.42: Create Contact – Correspondence Address

4) **Other Information**

- For user to enter some **Other Information** of the user such as **Occupation**, **Date of Birth**, **Marital Status**, **NRIC**, **Gender** and **Note**. (Optional)

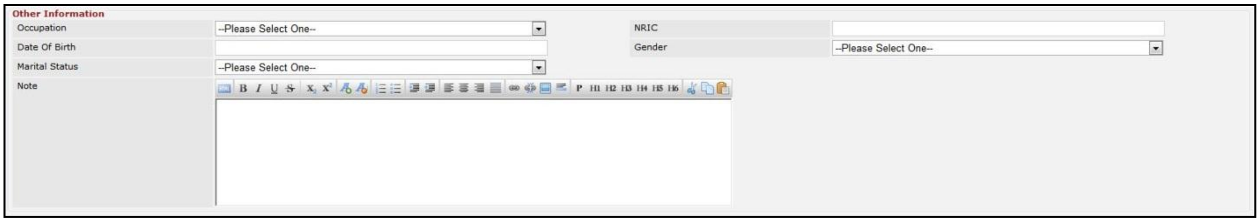


Figure 3.43: Create Contact – Other Information

To **cancel creating New Contact**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Contact and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Contact.

Select Contact

To select a **Contact** to this **Contact**, click at the Select menu. Once Select menu is clicked, a **User List** window will pop up for user to select a **Contact**. Click at the **First Name** or **Last Name** hyperlink in **First Name** or **Last Name column** to select the **Contact** that associate with this **Contact**.

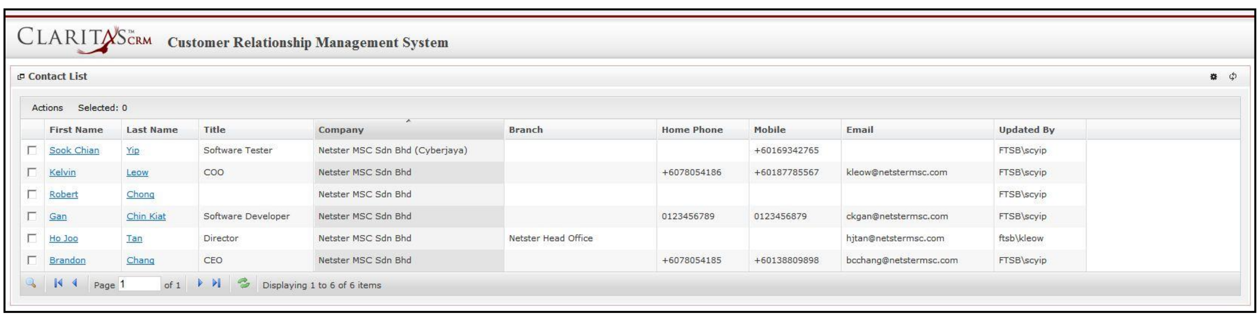


Figure 3.44: Select User Popup

Contact – Cases Subpanel

This subpanel contains any Cases related to the **Contact**.

Create New Case

To create a New Case related to an Contact, click at the Create New menu at **Issue** subpanel. Once Create New menu is clicked, a Case Management window will pop up for user to create a New Case.

Enter the details of the Case and click Save button to create the New Case.

There are **three** main sections to be filled in to create a new Case: **Case Details**, **Customer Feedback Form**, and **Case Resolution**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

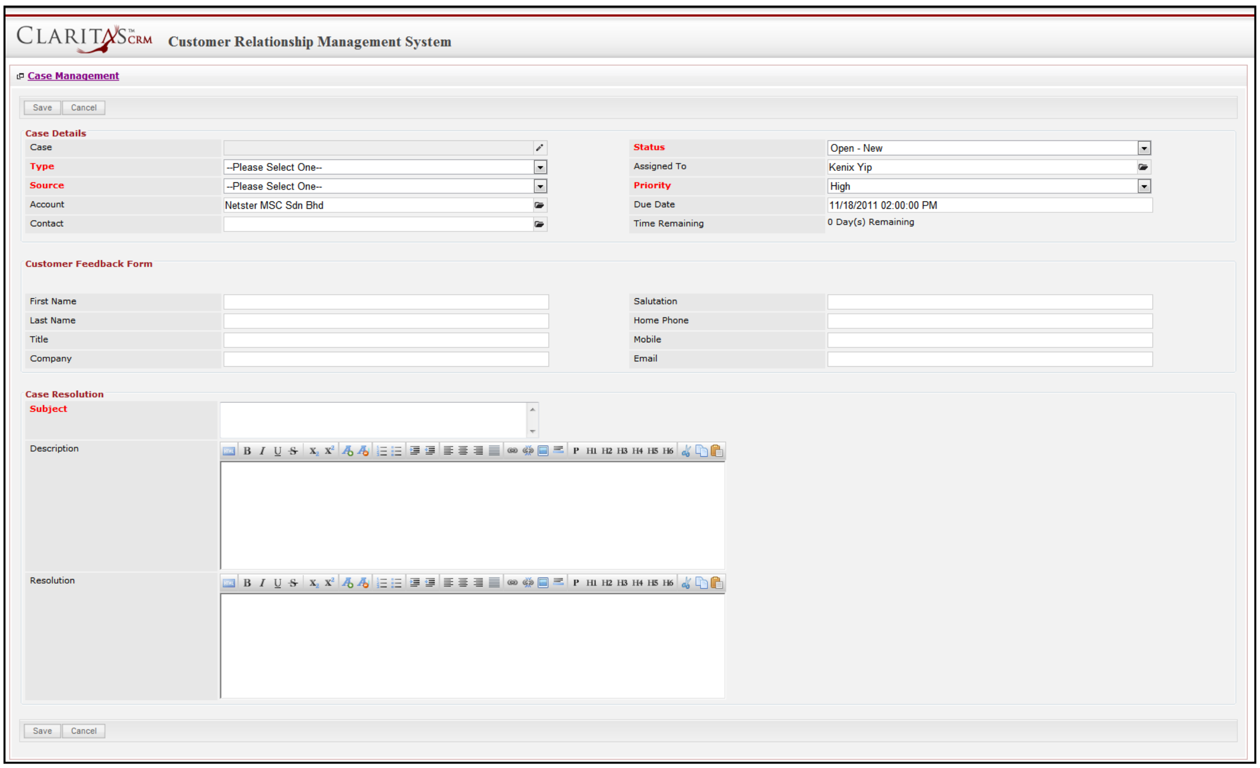


Figure 3.45: New Issue Management Popup

4) **Case Details**

- Compulsory fields: **Type**, **Source**, **Status**, and **Priority**.

Figure 3.46: Create Case - Case Details

- **Type** field is the type of the case; Options will be **Comment**, **Complaint**, **Compliment**, **Enquiry**, **Suggestion**, **Support** or **Other**.

- **Source** field is the source of the case created; Options available are: **Call**, **Email**, **Fax**, **Letter**, **Walk In**, **Web** or **Other**.
- **Status** field is the status of the case created; Options available are: **Open – New**, **Open – Assigned**, **Closed**, **Closed – Rejected**, **Closed – Duplicate** or **Closed – KIV**.
- **Priority** field is the priority of the case created; Options available are: **High**, **Medium** or **Low**.
- **Due Date** field when clicked will populate a calendar for user to select the date and time for the Case. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Case is created. Click at the Done menu to set the date and time.

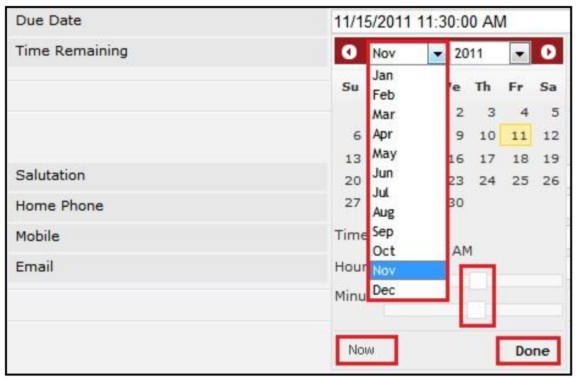


Figure 3.47: Due Date Time

- Once the Due Date is selected, **Time Remaining** field will auto-populate the remaining time (in day(s)) for the case.

5) **Customer Feedback Form**

- For user to enter the related Customer Details

Figure 3.48: Create Case – Customer Feedback Form

6) **Case Information**

- Compulsory fields: **Subject**.
- For user to enter the related Case Subject, Case Description and Resolution.

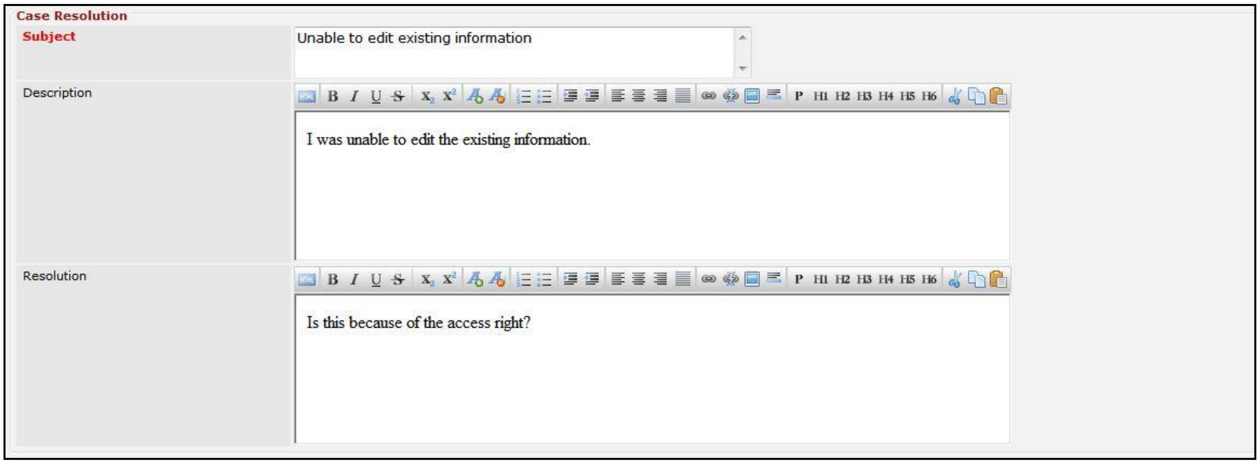


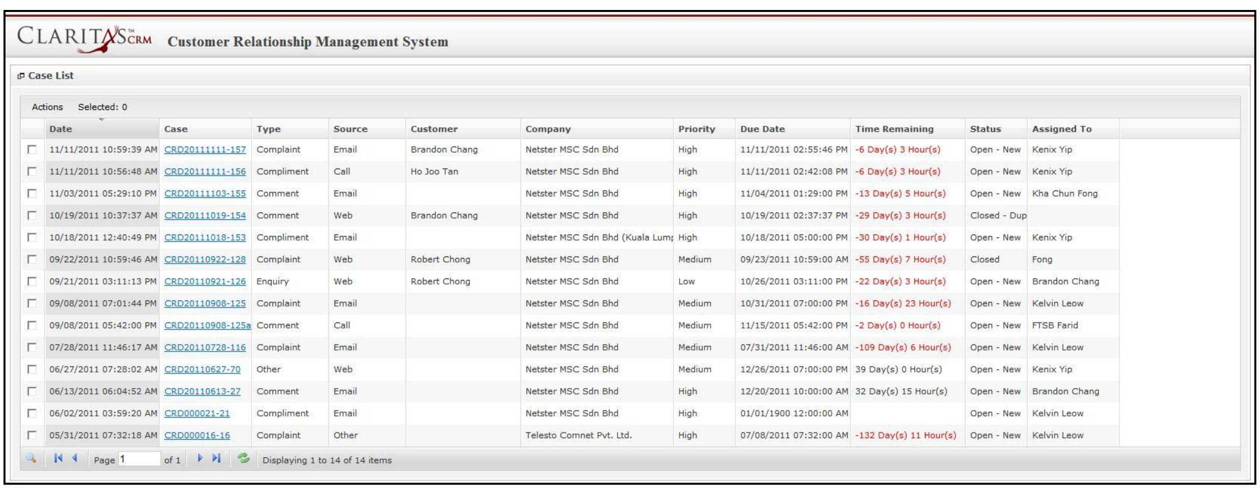
Figure 3.49: Create Contact – Case Resolution

To **cancel creating New Issue**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Issue and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Issue.

Select Issue

To select an **Issue** to this **Case**, click at the Select menu. Once Select menu is clicked, an **Issue List** window will pop up for user to select an **Issue**. Click at the **Issue Name** hyperlink in **Issue Name** column to select the **Issue** that associate with this **Case**.



Date	Case	Type	Source	Customer	Company	Priority	Due Date	Time Remaining	Status	Assigned To
11/11/2011 10:59:39 AM	CRD20111111-157	Complaint	Email	Brandon Chang	Netster MSC Sdn Bhd	High	11/11/2011 02:55:46 PM	-6 Day(s) 3 Hour(s)	Open - New	Kenix Yip
11/11/2011 10:56:48 AM	CRD20111111-156	Compliment	Call	Ho Joo Tan	Netster MSC Sdn Bhd	High	11/11/2011 02:42:08 PM	-6 Day(s) 3 Hour(s)	Open - New	Kenix Yip
11/03/2011 05:29:10 PM	CRD20111103-155	Comment	Email		Netster MSC Sdn Bhd	High	11/04/2011 01:29:00 PM	-13 Day(s) 5 Hour(s)	Open - New	Kha Chun Fong
10/19/2011 10:37:37 AM	CRD20111019-154	Comment	Web	Brandon Chang	Netster MSC Sdn Bhd	High	10/19/2011 02:37:37 PM	-29 Day(s) 3 Hour(s)	Closed - Dup	
10/18/2011 12:40:49 PM	CRD20111018-153	Compliment	Email		Netster MSC Sdn Bhd (Kuala Lump	High	10/18/2011 05:00:00 PM	-30 Day(s) 1 Hour(s)	Open - New	Kenix Yip
09/22/2011 10:59:46 AM	CRD20110922-128	Complaint	Web	Robert Chong	Netster MSC Sdn Bhd	Medium	09/23/2011 10:59:00 AM	-55 Day(s) 7 Hour(s)	Closed	Fong
09/21/2011 03:11:13 PM	CRD20110921-126	Enquiry	Web	Robert Chong	Netster MSC Sdn Bhd	Low	10/26/2011 03:11:00 PM	-22 Day(s) 3 Hour(s)	Open - New	Brandon Chang
09/08/2011 07:01:44 PM	CRD20110908-125	Complaint	Email		Netster MSC Sdn Bhd	Medium	10/31/2011 07:00:00 PM	-16 Day(s) 23 Hour(s)	Open - New	Kelvin Leow
09/08/2011 05:42:00 PM	CRD20110908-125a	Comment	Call		Netster MSC Sdn Bhd	Medium	11/15/2011 05:42:00 PM	-2 Day(s) 0 Hour(s)	Open - New	FTSB Farid
07/28/2011 11:46:17 AM	CRD20110728-116	Complaint	Email		Netster MSC Sdn Bhd	Medium	07/31/2011 11:46:00 AM	-109 Day(s) 6 Hour(s)	Open - New	Kelvin Leow
06/27/2011 07:28:02 AM	CRD20110627-70	Other	Web		Netster MSC Sdn Bhd	Medium	12/26/2011 07:00:00 PM	39 Day(s) 0 Hour(s)	Open - New	Kenix Yip
06/13/2011 06:04:52 AM	CRD20110613-27	Comment	Email		Netster MSC Sdn Bhd	High	12/20/2011 10:00:00 AM	32 Day(s) 15 Hour(s)	Open - New	Brandon Chang
06/02/2011 03:59:20 AM	CRD000021-21	Compliment	Email		Netster MSC Sdn Bhd	High	01/01/1900 12:00:00 AM		Open - New	Kelvin Leow
05/31/2011 07:32:18 AM	CRD000016-16	Complaint	Other		Telesto Comnet Pvt. Ltd.	High	07/08/2011 07:32:00 AM	-132 Day(s) 11 Hour(s)	Open - New	Kelvin Leow

Page 1 of 1 Displaying 1 to 14 of 14 items

Figure 3.50: Select Issue Popup

Contact – Contracts Subpanel

This subpanel contains any Contract related to the **Contact**.

Create New Contract

To create a New Contract related to an Contact, click at the Create New menu at **Contracts** subpanel. Once Create New menu is clicked, a Contract Management window will pop up for user to create a New Contract. Enter the details of the Contract and click Save button to create the New Contract.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

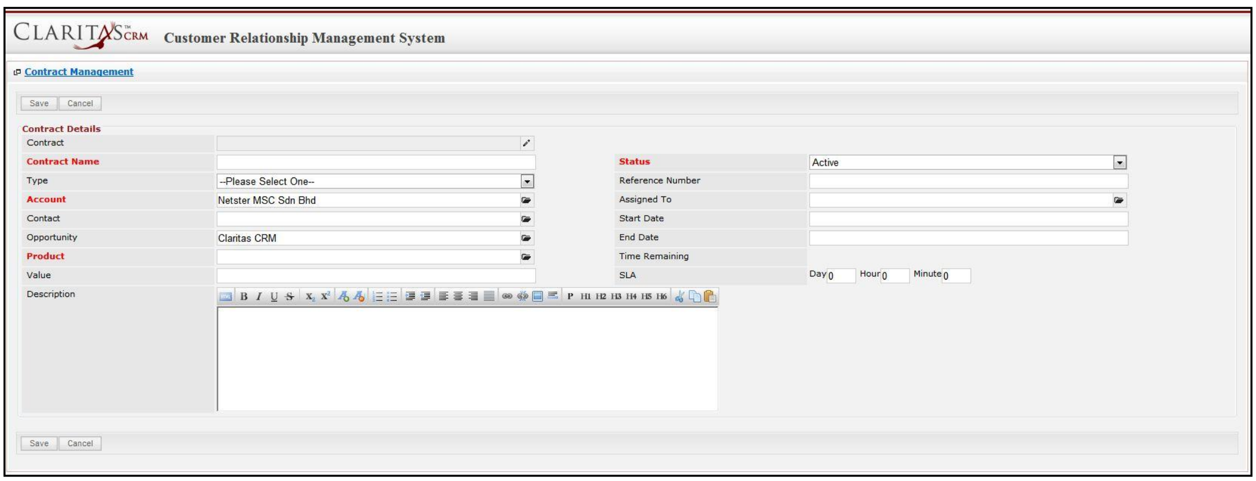


Figure 3.51: New Contract Management Popup

- Compulsory fields: **Contract Name**, **Contact**, **Product** and **Status**.
- **Contract Name** field is the name of the Contract;
- **Contact** field will auto populate the name of the related **Contact** (if available).
- **Contact, Contact** and **Product** field are to select or enter the related Contact, Contact and Product to the Contract. These fields will only be enabled once the **Contact** field is filled in. There are two ways of entering the **Product** field:
  - iii. Type in the Product Name and wait for the **auto-complete** dropdown of the Product; if the name entered does not match any of the available products; the textbox will be auto-cleared. (Click at the Product name to select the product) **OR**

Figure 3.52: Product Field Auto Complete Dropdown

iv. Click at the button to open a new popup containing the list of all Products. (Click at the Product Name hyperlink to select the product)

Purchase Date	Product	Product Name	Account	Value ($)	Status	Assigned To
10/13/2011	PROD20111013-10	Workflow Product	Netster MSC Sdn Bhd	100.00	Active	Kenix Yip

Page 1 of 1 Displaying 1 to 1 of 1 items

Figure 3.53: Product Listing Popup

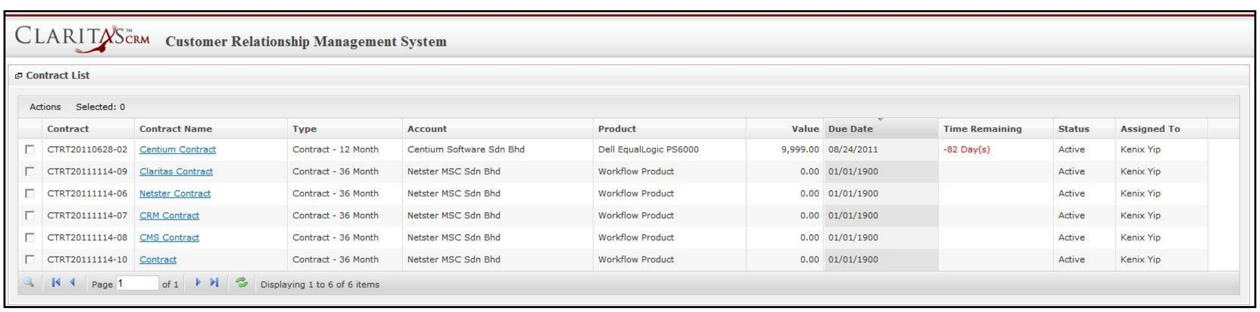
- **Status** field is the status of the Contract; the options for Status are: **Active** and **Inactive**.

To **cancel creating New Contract**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Contract and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Contract.

Select Contract

To select a **Contract** to this **Contact**, click at the Select menu. Once Select menu is clicked, a **Contract List** window will pop up for user to select a **Contract**. Click at the **Contract Name** hyperlink in **Contract Name** column to select the **Contract** that associate with this **Contact**.



Contract	Contract Name	Type	Account	Product	Value	Due Date	Time Remaining	Status	Assigned To
CTRT20110628-02	Centium Contract	Contract - 12 Month	Centium Software Sdn Bhd	Dell EqualLogic PS6000	9,999.00	08/24/2011	-82 Day(s)	Active	Kenix Yip
CTRT20111114-09	Claritas Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
CTRT20111114-06	Netster Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
CTRT20111114-07	CRM Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
CTRT20111114-08	CMS Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
CTRT20111114-10	Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip

Page 1 of 1 Displaying 1 to 6 of 6 items

Figure 3.54: Select Contract Popup

Contact – Opportunities Subpanel

This subpanel contains Opportunities related to the **Contact**.

Create New Opportunity

To create a New Opportunity related to this Contact, click at the Create New menu at Opportunity **List** subpanel. Once Create New menu is clicked, an Opportunity Management window will pop up for user to create a New Opportunity. Enter the details of the Opportunity and click Save button to create the New Opportunity.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

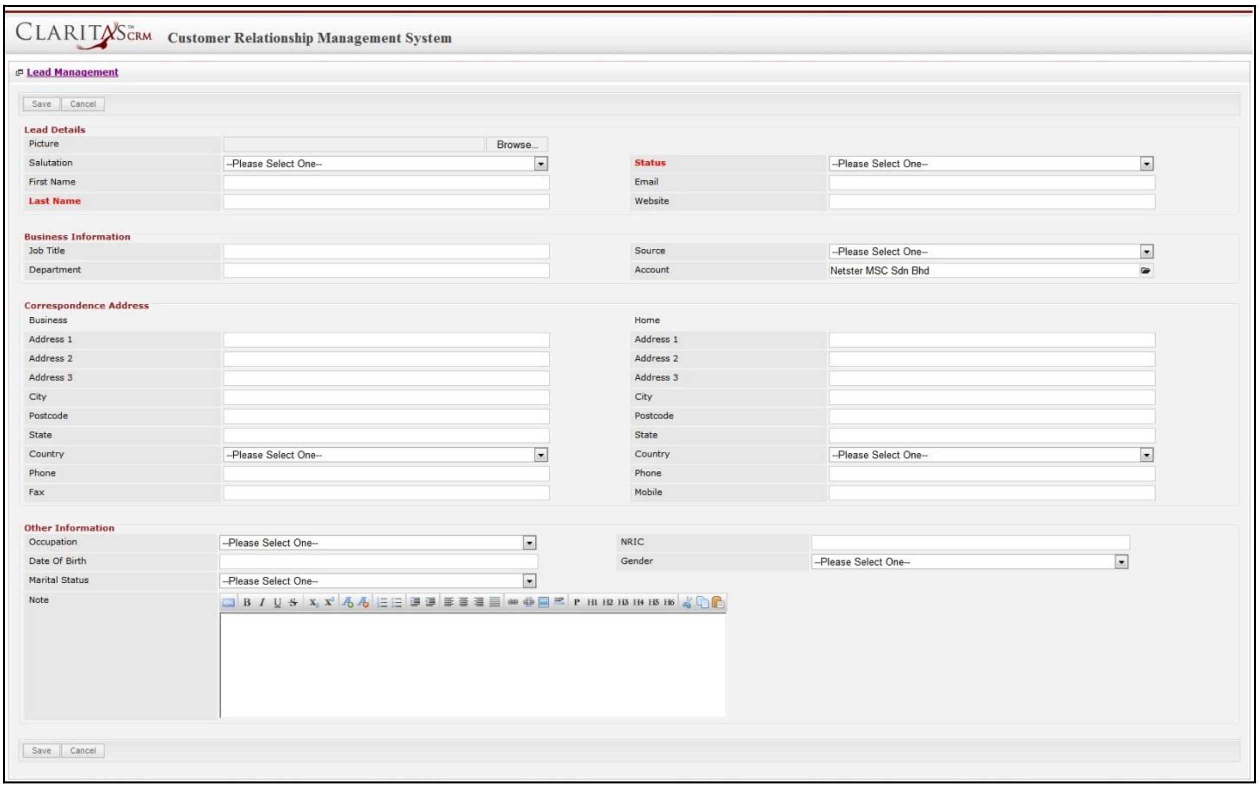


Figure 3.55: New Opportunity Management Popup

Compulsory fields: **Last Name** and **Status**.

There are **four** main sections to be filled in to create a new Opportunity: **Lead Profile**, **Business Information**, **Correspondence Address** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

3) **Opportunity Details**

- Compulsory fields: **Opportunity Name**, **Contact**, **Sales Status**, **Probability**, **Amount** and **Expected Close Date**.

Figure 3.56: Create Opportunity - Opportunity Details

- **Opportunity Name** field will be the Opportunity Name for identification.
- **Contact** field is to assign the Opportunity to the related Contact. There are two ways of entering the **Contact** field:

  iii. Type in the Company Name and wait for the **auto-complete** dropdown of the Contact, if the name entered does not match any of the available accounts; the textbox will be auto-cleared. (Click at the Company Name to select the account) **OR**

Figure 3.57: Contact Field Auto Complete Dropdown

  iv. Click at the button to open a new popup containing the list of all Contacts. (Click at the Company Name hyperlink to select the account)

Figure 3.58: Contact Popup

- **Status** field is the status of the Campaign created; Options available are: **Prospecting**, **Qualification**, **Value Proposition**, **Proposal/Quotation**, **Negotiation**, **Closed Won** or **Closed Lost**.
- **Probability** field is for user to enter the probability that the opportunity will be having.
- **Amount** field is for user to enter the amount that the opportunity will be having.
- **Expected Close Date** field when clicked will populate a calendar for user to select the date for the Opportunity. Click at the **Month** and **Year** dropdown to navigate to the selected date.

Figure 3.59: Expected Close Date

4) **Other Information**

   a. For user to enter some description or additional information regarding the opportunity. (Optional)

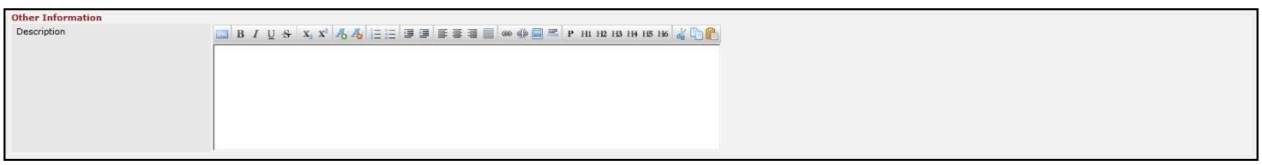


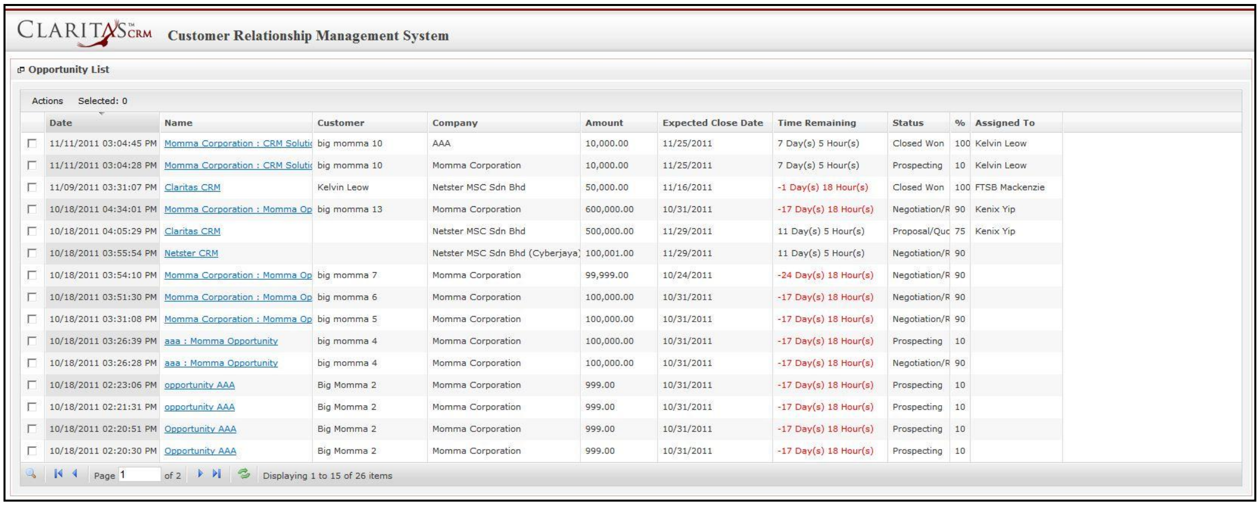
Figure 3.60: Create Opportunity - Other Information

To **cancel creating New Opportunity**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Opportunity and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Opportunity.

Select Opportunity

To select an **Opportunity** to this **Acount**, click at the Select menu. Once Select menu is clicked, a **Lead List** window will pop up for user to select an **Contact**. Click at the Name hyperlink in **Name column** to select the **Opportunity** that associate with this **Contact**.


CLARITAS™ CRM Customer Relationship Management System

Opportunity List

Actions Selected: 0

	Date	Name	Customer	Company	Amount	Expected Close Date	Time Remaining	Status	%	Assigned To
☐	11/11/2011 03:04:45 PM	Momma Corporation : CRM Solutic	big momma 10	AAA	10,000.00	11/25/2011	7 Day(s) 5 Hour(s)	Closed Won	100	Kelvin Leow
☐	11/11/2011 03:04:28 PM	Momma Corporation : CRM Solutic	big momma 10	Momma Corporation	10,000.00	11/25/2011	7 Day(s) 5 Hour(s)	Prospecting	10	Kelvin Leow
☐	11/09/2011 03:31:07 PM	Claritas CRM	Kelvin Leow	Netster MSC Sdn Bhd	50,000.00	11/16/2011	-1 Day(s) 18 Hour(s)	Closed Won	100	FTSB Mackenzie
☐	10/18/2011 04:34:01 PM	Momma Corporation : Momma Op	big momma 13	Momma Corporation	600,000.00	10/31/2011	-17 Day(s) 18 Hour(s)	Negotiation/R	90	Kenix Yip
☐	10/18/2011 04:05:29 PM	Claritas CRM		Netster MSC Sdn Bhd	500,000.00	11/29/2011	11 Day(s) 5 Hour(s)	Proposal/Quc	75	Kenix Yip
☐	10/18/2011 03:55:54 PM	Netster CRM		Netster MSC Sdn Bhd (Cyberjaya)	100,001.00	11/29/2011	11 Day(s) 5 Hour(s)	Negotiation/R	90	
☐	10/18/2011 03:54:10 PM	Momma Corporation : Momma Op	big momma 7	Momma Corporation	99,999.00	10/24/2011	-24 Day(s) 18 Hour(s)	Negotiation/R	90	
☐	10/18/2011 03:51:30 PM	Momma Corporation : Momma Op	big momma 6	Momma Corporation	100,000.00	10/31/2011	-17 Day(s) 18 Hour(s)	Negotiation/R	90	
☐	10/18/2011 03:31:08 PM	Momma Corporation : Momma Op	big momma 5	Momma Corporation	100,000.00	10/31/2011	-17 Day(s) 18 Hour(s)	Negotiation/R	90	
☐	10/18/2011 03:26:39 PM	aaa : Momma Opportunity	big momma 4	Momma Corporation	100,000.00	10/31/2011	-17 Day(s) 18 Hour(s)	Prospecting	10	
☐	10/18/2011 03:26:28 PM	aaa : Momma Opportunity	big momma 4	Momma Corporation	100,000.00	10/31/2011	-17 Day(s) 18 Hour(s)	Negotiation/R	90	
☐	10/18/2011 02:23:06 PM	opportunity AAA	Big Momma 2	Momma Corporation	999.00	10/31/2011	-17 Day(s) 18 Hour(s)	Prospecting	10	
☐	10/18/2011 02:21:31 PM	opportunity AAA	Big Momma 2	Momma Corporation	999.00	10/31/2011	-17 Day(s) 18 Hour(s)	Prospecting	10	
☐	10/18/2011 02:20:51 PM	Opportunity AAA	Big Momma 2	Momma Corporation	999.00	10/31/2011	-17 Day(s) 18 Hour(s)	Prospecting	10	
☐	10/18/2011 02:20:30 PM	Opportunity AAA	Big Momma 2	Momma Corporation	999.00	10/31/2011	-17 Day(s) 18 Hour(s)	Prospecting	10	

Page 1 of 2 Displaying 1 to 15 of 26 items

Figure 3.61: Select Opportunity Popup

Contact – Quotes Subpanel

This subpanel contains any Quote related to the **Contact**.

Create New Quote

To create a New Quote related to an Contact, click at the Create New menu at **Quotes** subpanel. Once Create New menu is clicked, a Quote Management window will pop up for user to create a New Quote. Enter the details of the Quote and click Save button to create the New Quote.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

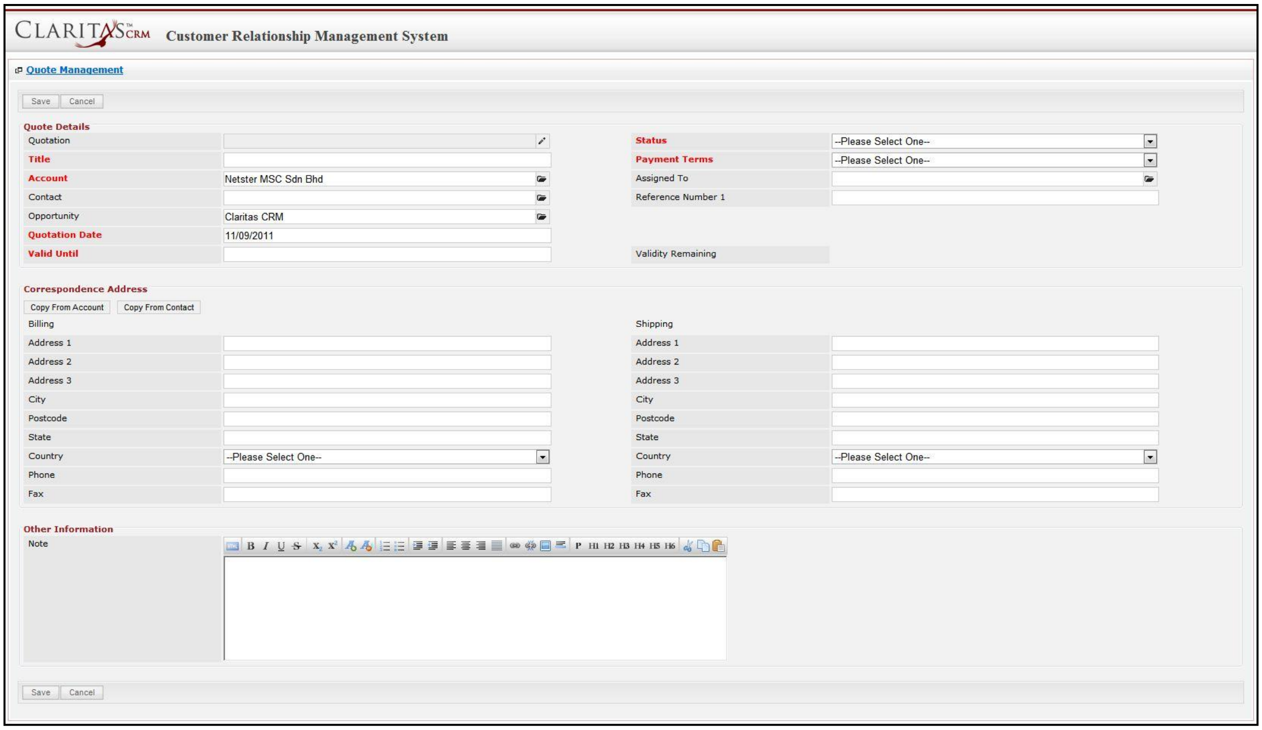


Figure 3.62: New Quote Management Popup

- Compulsory fields: **Title**, **Contact**, **Quotation Date**, **Valid Until**, **Status** and **Payment Terms**.
- **Title** field is the title of the Quote;
- **Contact** field will auto populate the name of the related **Contact** (if available).
- **Quotation Date** field when clicked will populate a calendar for user to select the date for the Quote. Click at the **Month** and **Year** dropdown to navigate to the selected date.

Figure 3.63: Quotation Date

- **Valid Until** field when clicked will populate a calendar for user to select the date where this Quote is Valid Until. Click at the **Month** and **Year** dropdown to navigate to the selected date.

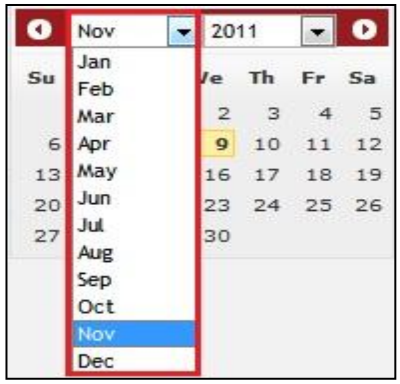


Figure 3.64: Valid Until

- **Status** field is the status of the Quote; the options for Status are: **Draft**, **Negotiation**, **Delivered**, **On Hold**, **Closed Won** and **Closed Lost**.
- **Payment Terms** field is the term for the payment; the options for Payment Terms are: **Cash on Delivery**, **Net 7 Days**, **Net 14 Days**, **Net 30 Days** and **Net 60 Days**.
- In **Correspondence Address** section, user can choose to copy the address from the related Contact by clicking the Copy From Account button or copy the address from the related Contact by clicking the Copy From Contact button. Otherwise, user can also choose to manually enter the Billing and Shipping address.
- After a New Quote is created, the subpanel will auto-refresh and display the newly-created Quote.

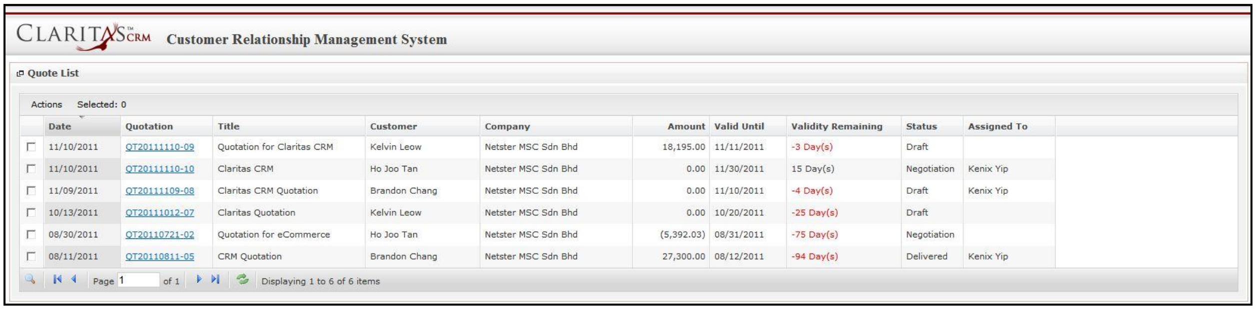
Figure 3.65: Quotes Subpanel List New Quote

To **cancel creating New Quote**, click Cancel button. A confirmation dialog showing “Are you sure you want to close this window?” will prompt user to cancel creating New Quote and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Quote.

Select Quote

To select a **Quote** to this **Contact**, click at the Select menu. Once Select menu is clicked, a **Quote List** window will pop up for user to select a **Quote**. Click at the **Quote** hyperlink in **Quote column** to select the **Quote** that associate with this **Contact**.



Date	Quotation	Title	Customer	Company	Amount	Valid Until	Validity Remaining	Status	Assigned To
11/10/2011	QT20111110-09	Quotation for Claritas CRM	Kelvin Leow	Netster MSC Sdn Bhd	18,195.00	11/11/2011	-3 Day(s)	Draft	
11/10/2011	QT20111110-10	Claritas CRM	Ho Joo Tan	Netster MSC Sdn Bhd	0.00	11/30/2011	15 Day(s)	Negotiation	Kenix Yip
11/09/2011	QT20111109-08	Claritas CRM Quotation	Brandon Chang	Netster MSC Sdn Bhd	0.00	11/10/2011	-4 Day(s)	Draft	Kenix Yip
10/13/2011	QT20111012-07	Claritas Quotation	Kelvin Leow	Netster MSC Sdn Bhd	0.00	10/20/2011	-25 Day(s)	Draft	
08/30/2011	QT20110721-02	Quotation for eCommerce	Ho Joo Tan	Netster MSC Sdn Bhd	(5,392.03)	08/31/2011	-75 Day(s)	Negotiation	
08/11/2011	QT20110811-05	CRM Quotation	Brandon Chang	Netster MSC Sdn Bhd	27,300.00	08/12/2011	-94 Day(s)	Delivered	Kenix Yip

Figure 3.66: Select Quote Popup

4 Sales & Marketing - Campaign

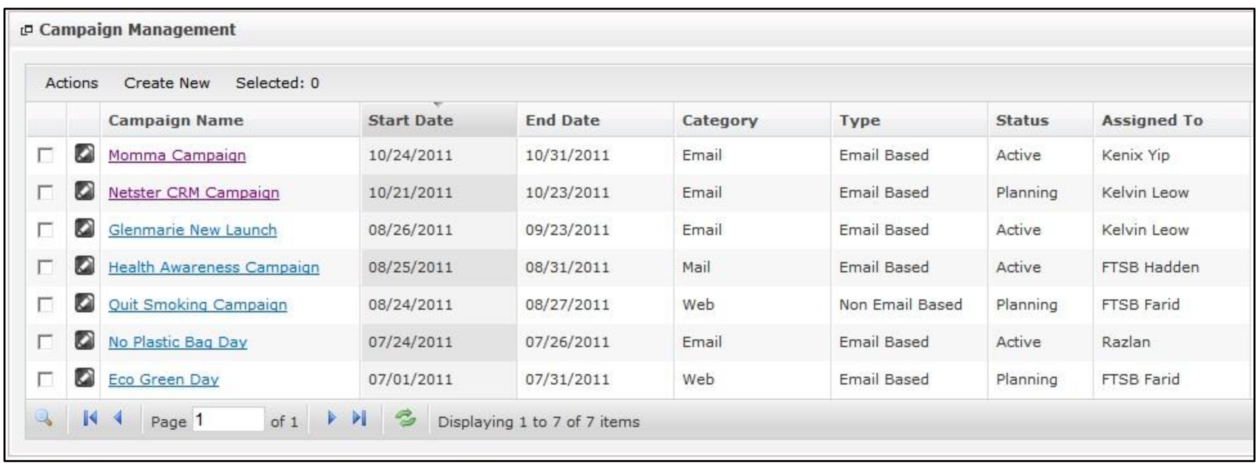
The Campaign module is for user to **create and store details of Campaign**.

Campaign Listing

To view **Campaign** Listing, click at the **Sales & Marketing > Campaign** menu at the Main Menu bar.

Figure 4.1: Campaign Menu in Main Menu

Page will load the list of the **Campaign** available in the system.



Campaign Management

Actions Create New Selected: 0

Campaign Name	Start Date	End Date	Category	Type	Status	Assigned To
Momma Campaign	10/24/2011	10/31/2011	Email	Email Based	Active	Kenix Yip
Netster CRM Campaign	10/21/2011	10/23/2011	Email	Email Based	Planning	Kelvin Leow
Glenmarie New Launch	08/26/2011	09/23/2011	Email	Email Based	Active	Kelvin Leow
Health Awareness Campaign	08/25/2011	08/31/2011	Mail	Email Based	Active	FTSB Hadden
Quit Smoking Campaign	08/24/2011	08/27/2011	Web	Non Email Based	Planning	FTSB Farid
No Plastic Bag Day	07/24/2011	07/26/2011	Email	Email Based	Active	Razlan
Eco Green Day	07/01/2011	07/31/2011	Web	Email Based	Planning	FTSB Farid

Page 1 of 1 Displaying 1 to 7 of 7 items

Figure 4.2: Campaign Listing

To view the Campaign Details, click at the Campaign Name hyperlink in Campaign Name column.

Campaign Management

Actions Create New Selected: 0

Campaign Name	Start Date	End Date	Category	Type	Status	Assigned To
Momma Campaign	10/24/2011	10/31/2011	Email	Email Based	Active	Kenix Yip
Netster CRM Campaign	10/21/2011	10/23/2011	Email	Email Based	Planning	Kelvin Leow
Health Awareness Campaign	08/25/2011	08/31/2011	Mail	Email Based	Active	FTSB Hadden
Quit Smoking Campaign	08/24/2011	08/27/2011	Web	Non Email Based	Planning	FTSB Farid

Page 1 of 1 Displaying 1 to 4 of 4 items

Figure 4.3: Campaign Name Hyperlink

After clicking the Campaign Name hyperlink, page will navigate to the **Campaign Management Detail** page which displays all the details of the Campaign include related **Targets**.

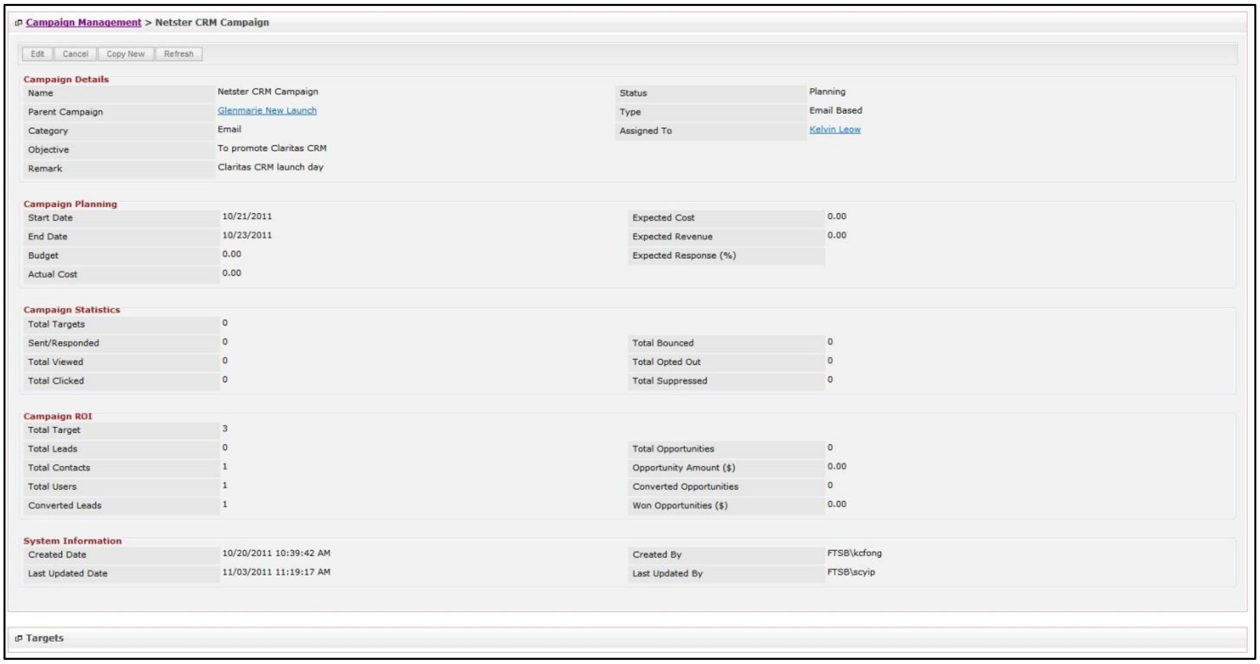


Figure 4.4: Campaign Management Detail Page

To copy the entire record and save as a new record, click Copy New button at **Campaign Management Detail** page.

To refresh the page, click at the Refresh button.

To create a new campaign, click at Create New menu at the top of the Campaign Listing.

Figure 4.5: Create New Campaign Menu

After clicking Create New menu, page will navigate to **Campaign Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Campaign Management Detail** page or click Cancel button to cancel creating and navigates back to the **Campaign Listing** page.

***Related Topics**: See "Create New Campaign"*

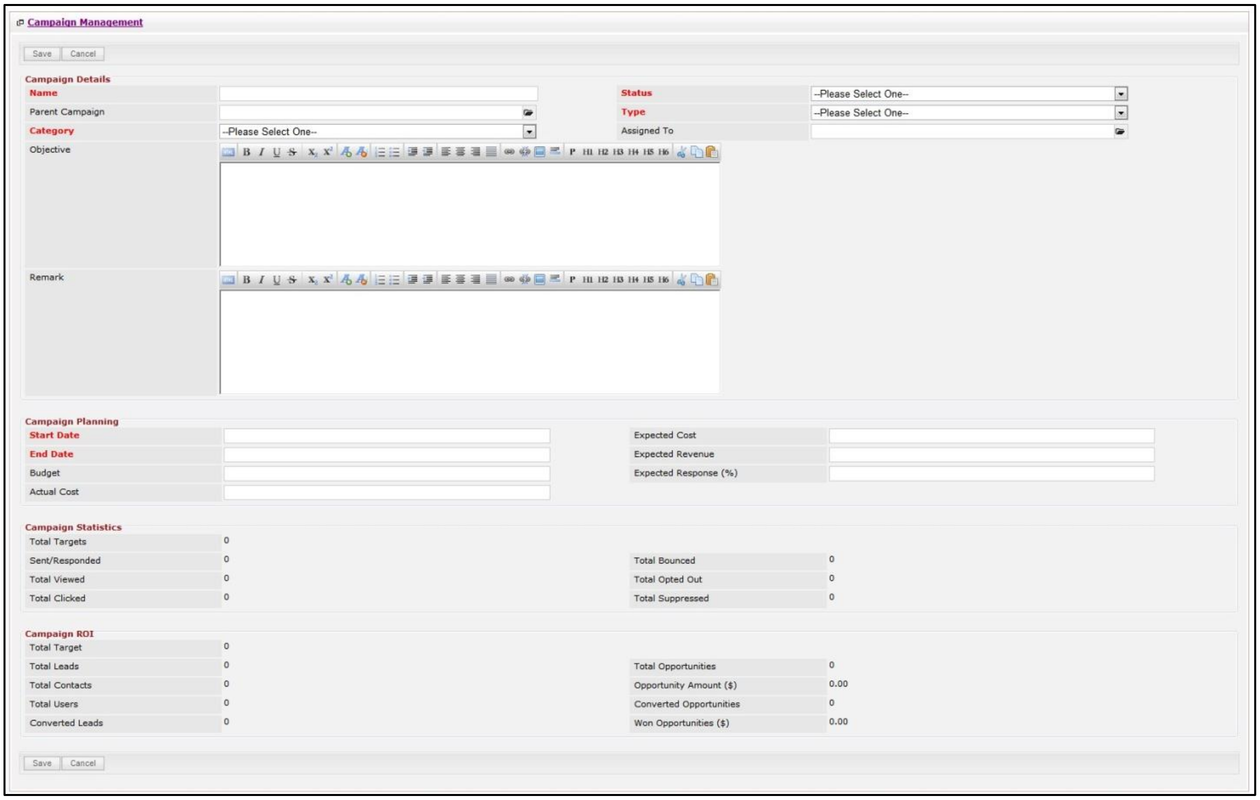


Figure 4.6: Campaign Management Create New Page

To **delete** a campaign, select the record and click **Actions > Delete**.

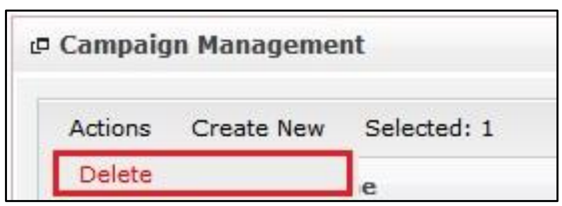


Figure 4.7: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 4.8: Message Showing Campaign Deleted Successfully

Deleted campaign will **no longer** be displayed in Campaign Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

Figure 4.9: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

Figure 4.10: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

Figure 4.11: Actions > Unselect (All Pages) Menu

To go to the First Page of the listing, click at the **First Page**  button.

To go to the Previous Page of the listing, click at the **Previous Page**  button.

To go to the Next Page of the listing, click at the **Next Page**  button.

To go to the Last Page of the listing, click at the **Last Page**  button.

To refresh the listing page, click at the **Refresh**  button.

To search for record/s, click at the **Search** button. An **Advance Search** section will expand at the bottom of the listing for user to select the search field and enter search value.

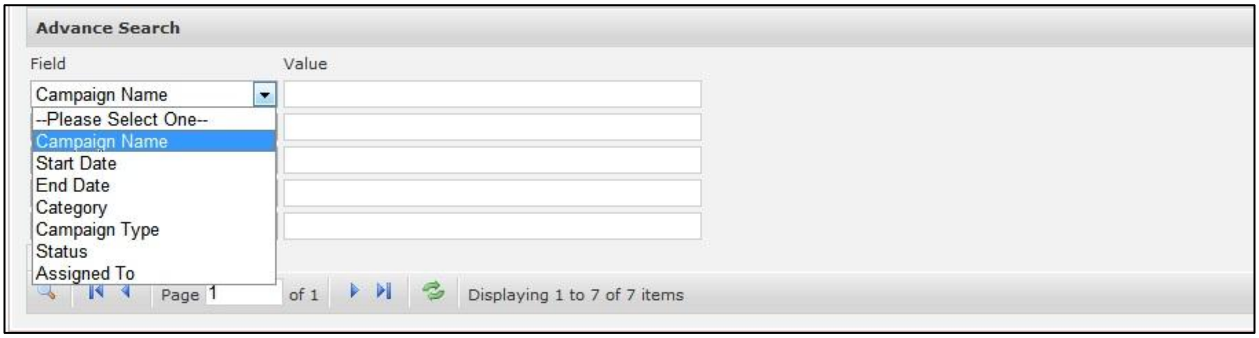


Figure 4.12: Campaign Advance Search

To edit the details of the Campaign, click at the **Edit** button or click the Edit button in **Campaign Management Detail** page. After clicking at the **Edit** button page will navigate to the **Campaign Management Edit** page.

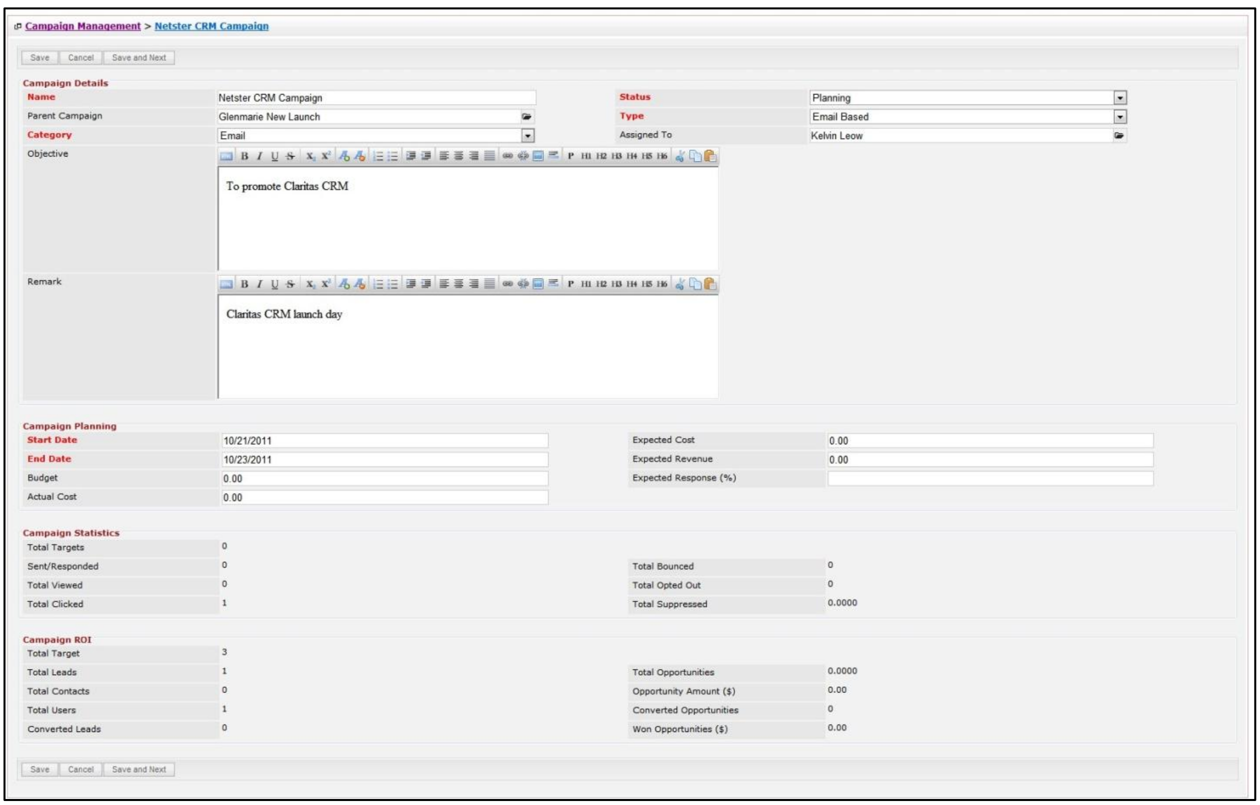


Figure 4.13: Campaign Management Edit Page

Edit the relevant details and click Save button to save the changes and navigates back to **Campaign Management Detail** page or click Save and Next button to save the changes and navigates to the

Campaign Management Edit page of the next Campaign. Or click Cancel button to cancel editing and navigates back to the **Campaign Management Detail** page.

***Related Topics**: See "Edit Campaign"*

Create New Campaign

To create new campaign, click at the **Sales & Marketing > Campaign** menu at the Main Menu bar. Then click the Create New menu at the top of the **Campaign Listing**. After clicking Create New menu, page will navigate to **Campaign Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Campaign Management Detail** page.

There are **two** main sections to be filled in to create a new Campaign: **Campaign Details** and **Campaign Planning**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Campaign Details**

- Compulsory fields: **Name**, **Category**, **Status**, **Type**

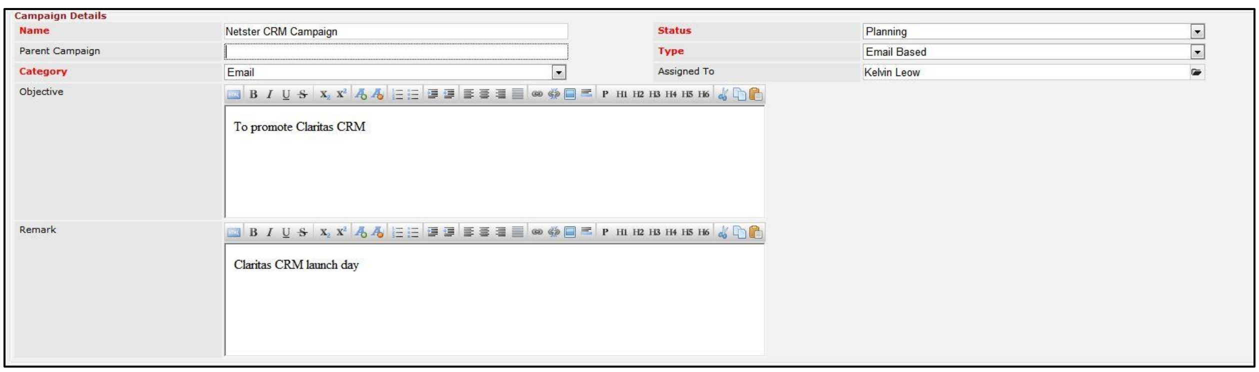
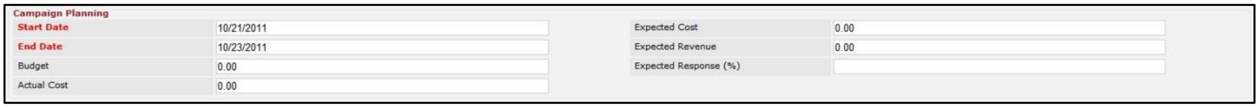


Figure 4.14: Create Campaign - Campaign Details

- **Name** field will be the Campaign Name for identification.
- **Category** field is the category of the Campaign created; Options available are: **Telesales**, **Mail**, **Closed**, **Email**, **Print, Web, Radio, Television** or **Newsletter**.
- **Status** field is the status of the Campaign created; Options available are: **Planning**, **Active**, **Inactive**, **Complete**, **In Queue** or **Sending**.
- **Type** field is the type of the Campaign created; Options available are: **Email Based** or **Non Email Based**.

2) **Campaign Planning**

- Compulsory fields: **State Date** and **End Date**



Campaign Planning			
Start Date	10/21/2011	Expected Cost	0.00
End Date	10/23/2011	Expected Revenue	0.00
Budget	0.00	Expected Response (%)	
Actual Cost	0.00		

Figure 4.15: Create Campaign – Campaign Planning

- **Start Date** field when clicked will populate a calendar for user to select the date for the Opportunity. Click at the **Month** and **Year** dropdown to navigate to the selected date.

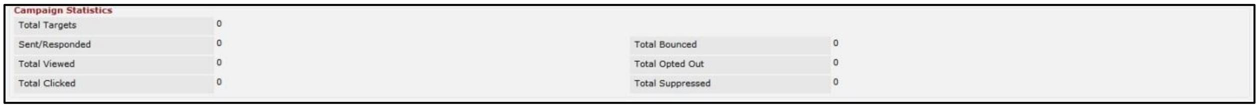
Figure 4.16: Start Date

- **End Date** field when clicked will populate a calendar for user to select the date for the Opportunity. Click at the **Month** and **Year** dropdown to navigate to the selected date.

Figure 4.17: End Date

3) **Campaign Statistics (To be updated)**

- All fields in this panel are non-editable. All the fields are auto-calculated based on the statistics.



Campaign Statistics			
Total Targets	0		
Sent/Responded	0	Total Bounced	0
Total Viewed	0	Total Opted Out	0
Total Clicked	0	Total Suppressed	0

Figure 4.18: Create Campaign – Campaign Statistics

4) **Campaign ROI**

- All fields in this panel are non-editable.
- **Total Targets** indicates the total amount of targets of the campaign which includes Leads (Potential Customers), and Contact (Customers).
- **Total Leads** indicates the total amount of Leads (Potential Customers).
- **Total Contacts** indicates the total amount of Contacts (Customers).
- **Total Users** indicates the total amount of system users.
- **Converted Leads** indicates the number of Leads (Potential Customers) that are now Contacts (Customers)
- **Total Opportunities** indicates the total number of potential business/sales.
- **Opportunity Amount ($)** indicates the amount of the opportunity.
- **Converted Opportunities** indicates opportunities that had its status changed after the deal is off.
- **Won Opportunities** indicates opportunities that are successfully dealt.

Campaign ROI			
Total Target	0		
Total Leads	0	Total Opportunities	0
Total Contacts	0	Opportunity Amount ($)	0.00
Total Users	0	Converted Opportunities	0
Converted Leads	0	Won Opportunities ($)	0.00

Figure 4.19: Create Campaign – Campaign ROI

To cancel creating New Campaign, click Cancel button and navigates back to the **Campaign Listing** page.

Edit Campaign

To edit campaign details, click at the **Sales & Marketing > Campaign** menu at the Main Menu bar. Click at the **Edit** button in **Campaign Listing** page or click at the Campaign Name hyperlink in **Campaign Listing** page then click the Edit button in **Campaign Management Detail** page. After clicking the **Edit** button or Edit button, page will navigate to **Campaign Management Edit** page. Edit the relevant details and click Save button to save the changes and navigates back to **Campaign Management Detail** page or click Save and Next button to save the changes and navigates to the **Campaign Management Edit page** for the next record.

There are **two** main sections of Campaign to be edited: **Campaign Details** and **Campaign Planning**.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

1) **Campaign Details**

- Compulsory fields: **Name**, **Category**, **Status**, and **Type**

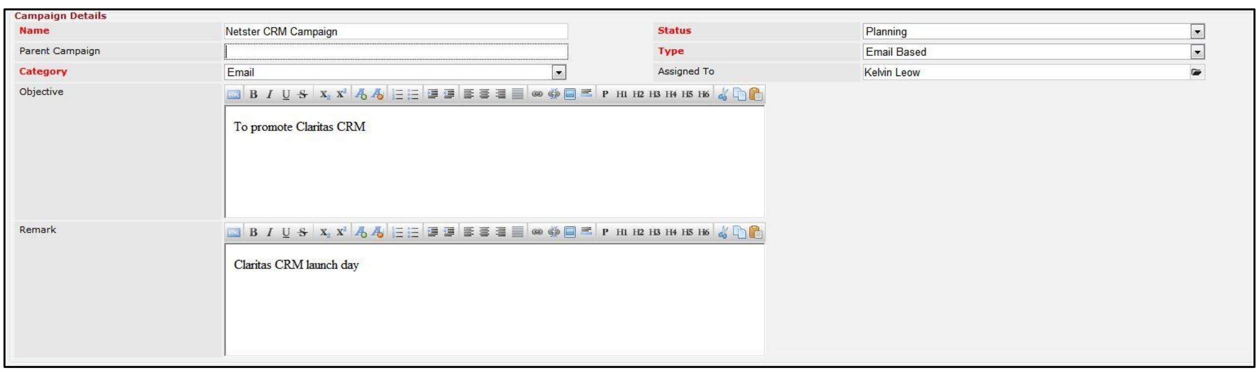


Figure 4.20: Edit Campaign - Campaign Details

- **Name** field will be the Campaign Name for identification.
- **Category** field is the category of the Campaign created; Options available are: **Telesales**, **Mail**, **Closed**, **Email**, **Print, Web, Radio, Television** or **Newsletter**.
- **Status** field is the status of the Campaign created; Options available are: **Planning**, **Active**, **Inactive**, **Complete**, **In Queue** or **Sending**.
- **Type** field is the type of the Campaign created; Options available are: **Email Based** or **Non Email Based**.

2) **Campaign Planning**

- Compulsory fields: **State Date** and **End Date**

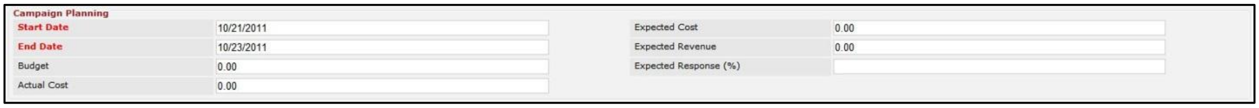


Figure 4.21: Create Campaign – Campaign Planning

- **Start Date** field when clicked will populate a calendar for user to select the date for the Opportunity. Click at the **Month** and **Year** dropdown to navigate to the selected date.

Figure 4.22: Start Date

- **End Date** field when clicked will populate a calendar for user to select the date for the Opportunity. Click at the **Month** and **Year** dropdown to navigate to the selected date.

Figure 4.23: End Date

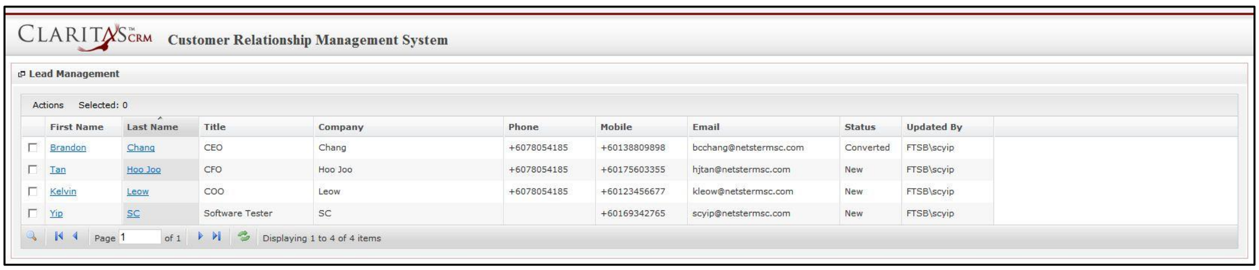
To cancel editing Campaign, click Cancel button and navigates back to the **Campaign Management Detail** page.

Campaign – Targets Subpanel

This subpanel contains any activities related to the campaign. **Lead**, **Contact** or **User** created will be displayed in this **Targets** subpanel.

Campaign – Targets Subpanel (Add Lead)

To add Lead related to a Campaign, click at the Add Lead menu at **Targets** subpanel. Once Add Lead menu is clicked, a Lead Listing window will pop up for user to select the lead. Click at the Lead's First Name or Last Name hyperlink to add the lead to the campaign.



CLARITAS CRM Customer Relationship Management System

Lead Management

Actions Selected: 0

First Name	Last Name	Title	Company	Phone	Mobile	Email	Status	Updated By
Brandon	Chang	CEO	Chang	+6078054185	+60138809898	bcchang@netstermsc.com	Converted	FTSB\scyip
Tan	Hoo Joo	CFO	Hoo Joo	+6078054185	+60175603355	hjtan@netstermsc.com	New	FTSB\scyip
Kelvin	Leow	COO	Leow	+6078054185	+60123456677	kleow@netstermsc.com	New	FTSB\scyip
Yip	SC	Software Tester	SC		+60169342765	scyip@netstermsc.com	New	FTSB\scyip

Page 1 of 1 Displaying 1 to 4 of 4 items

Figure 4.24: Lead Listing Popup

- After a Lead is added, the subpanel will auto-refresh and display the added Lead.

Targets

Add Lead Add Contact Add User Email SMS

Module	Lead Status	First Name	Last Name	Company	Mobile	Email	Remove
Lead	New	Yip	SC	Netster MSC Sdn Bhd		scyip@netstermsc.com	Remove
Contact		Sook Chian	Yip	Netster MSC Sdn Bhd (C)			Remove
User		Kenix	Yip		0169342765	scyip@netstermsc.com	Remove

Page 1 of 1 Displaying 1 to 3 of 3 items

Figure 4.25: Target Subpanel List Added Lead

To **cancel adding Lead**, close the Lead Listing popup.

Campaign – Targets Subpanel (Add Contact)

To add a Contact related to a Campaign, click at the Add Contact menu at **Targets** subpanel. Once Add Contact menu is clicked, a Contact Listing window will pop up for user to add Contact. Click at the Contact's First Name or Last Name hyperlink to add the contact to the campaign.

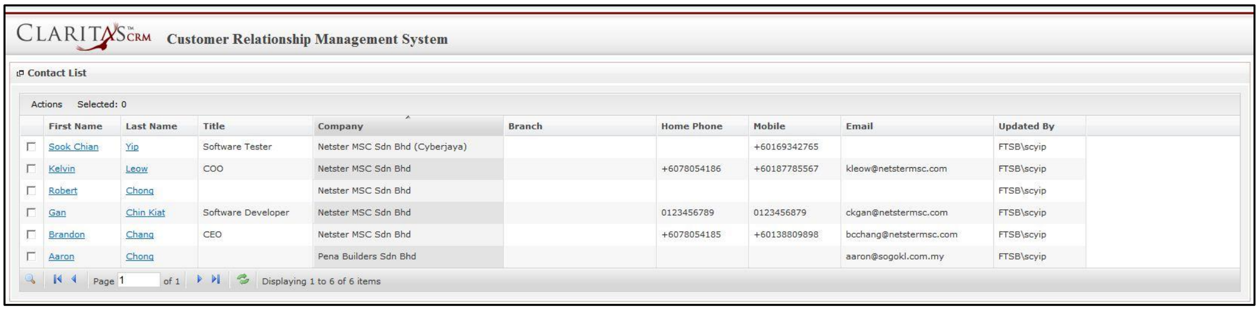


Figure 4.26: Contact Listing Popup

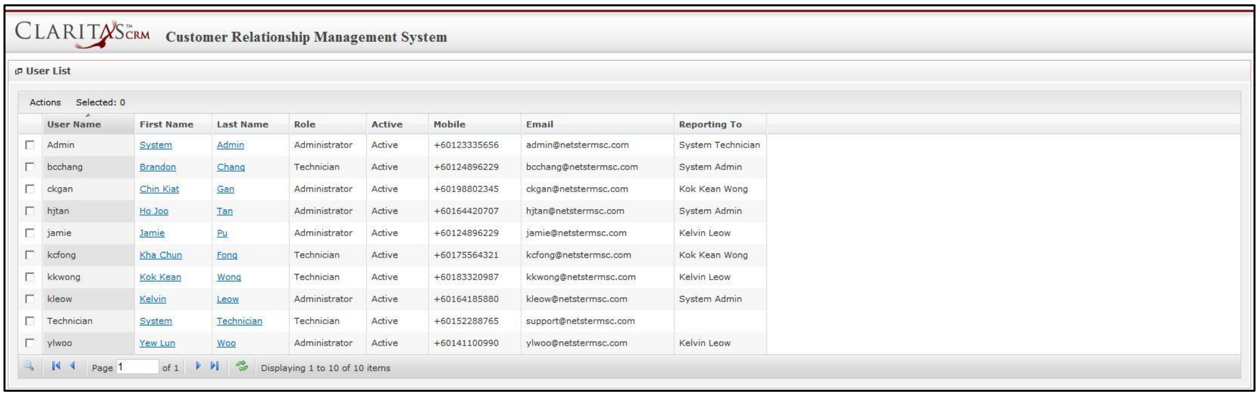
- After a Contact is added, the subpanel will auto-refresh and display the added Contact.

Figure 4.27: Target Subpanel List Added Contact

To **cancel adding Contact**, close the Contact Listing popup.

Campaign – Target Subpanel (Add User)

To add User related to a Campaign, click at the Add User menu at **Target** subpanel. Once Add User menu is clicked, a User Listing window will pop up for user to select the user. Click at the User's First Name or Last Name hyperlink to add the user to the campaign.


CLARITAS CRM Customer Relationship Management System

User List

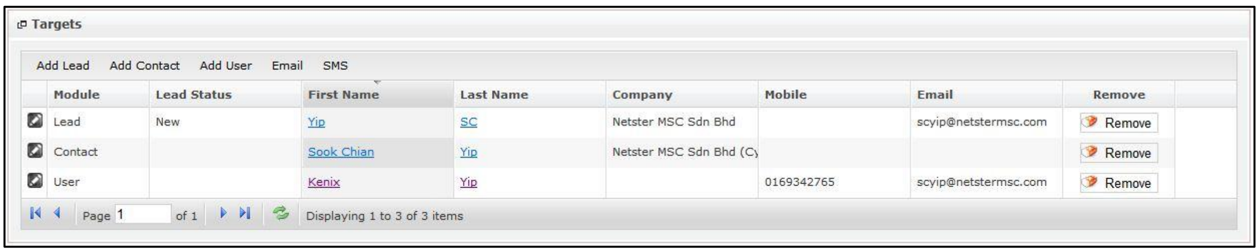
Actions Selected: 0

User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	+60123335656	admin@netstermsc.com	System Technician
bcchang	Brandon	Chang	Technician	Active	+60124896229	bcchang@netstermsc.com	System Admin
ckgan	Chin Kiat	Gan	Administrator	Active	+60198802345	ckgan@netstermsc.com	Kok Kean Wong
hjtan	Ho Joo	Tan	Administrator	Active	+60164420707	hjtan@netstermsc.com	System Admin
jamie	Jamie	Pu	Administrator	Active	+60124896229	jamie@netstermsc.com	Kelvin Leow
kcfong	Kha Chun	Fong	Technician	Active	+60175564321	kcfong@netstermsc.com	Kok Kean Wong
kkwong	Kok Kean	Wong	Technician	Active	+60183320987	kkwong@netstermsc.com	Kelvin Leow
kleow	Kelvin	Leow	Administrator	Active	+60164185880	kleow@netstermsc.com	System Admin
Technician	System	Technician	Technician	Active	+60152288765	support@netstermsc.com	
ylwoo	Yew Lun	Woo	Administrator	Active	+60141100990	ylwoo@netstermsc.com	Kelvin Leow

Page 1 of 1 Displaying 1 to 10 of 10 items

Figure 4.28: User Listing Popup

- After a User is added, the subpanel will auto-refresh and display the added User.


Targets

Add Lead Add Contact Add User Email SMS

Module	Lead Status	First Name	Last Name	Company	Mobile	Email	Remove
Lead	New	Yip	SC	Netster MSC Sdn Bhd		scyip@netstermsc.com	Remove
Contact		Sook Chian	Yip	Netster MSC Sdn Bhd (Cy			Remove
User		Kenix	Yip		0169342765	scyip@netstermsc.com	Remove

Page 1 of 1 Displaying 1 to 3 of 3 items

Figure 4.29: Target Subpanel List Added User

To **cancel adding User**, close the User Listing popup.

Campaign – Target Subpanel (Email)

To send email to the Lead, Contact and User of the Campaign, click at the Email button. A Compose Email window will pop up for user to compose the email.

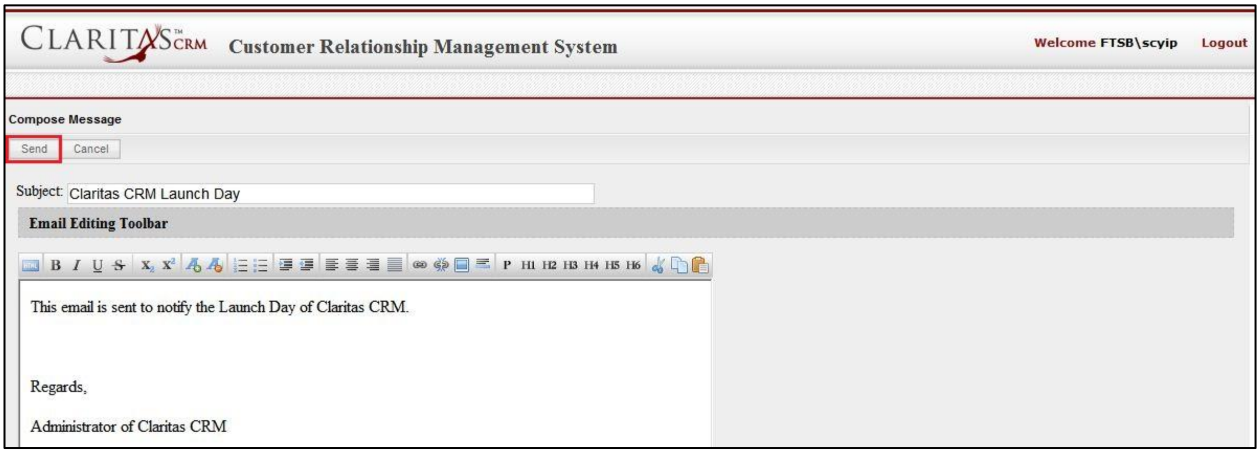


Figure 4.30: Compose Message Popup

Enter the Subject and Content of the email and click the Send button.

Once the Send button is clicked, the Lead, Contact and User related to the Campaign will receive the email.

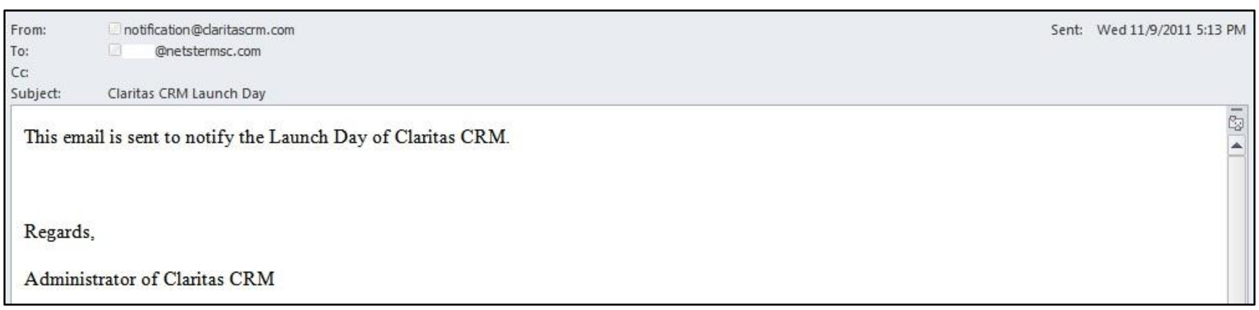


Figure 4.31: Target's Received Email

Campaign – Target Subpanel (SMS)

To send SMS to the Lead, Contact and User of the Campaign, click at the SMS button. A Compose SMS window will pop up for user to compose the SMS.

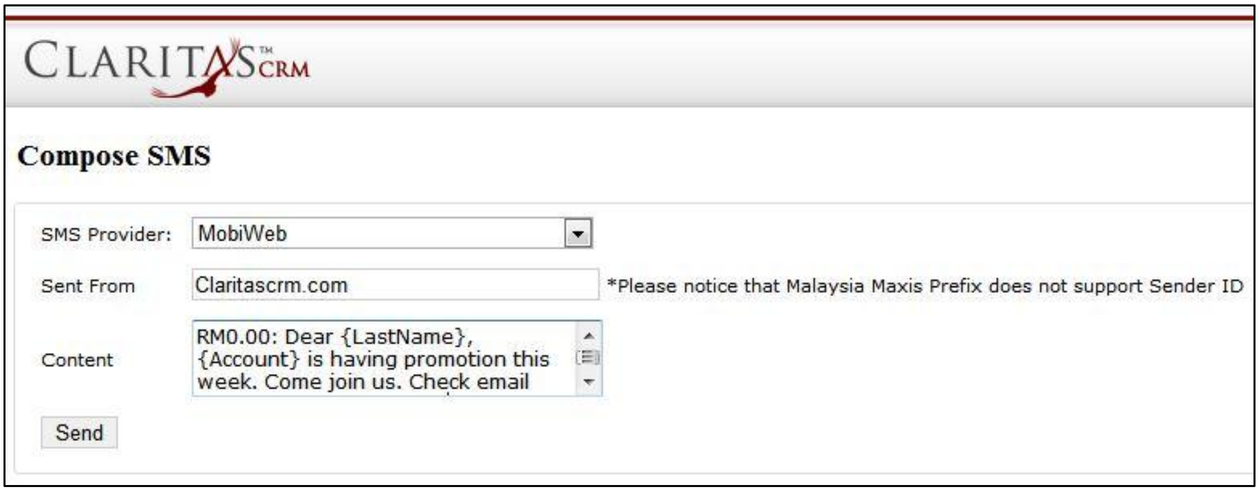


Figure 4.32: Compose SMS Popup

Select the SMS Provider, enter the Sent From and Content of the SMS and click the Send button.

Once the Send button is clicked, the Lead, Contact and User related to the Campaign will receive the SMS.

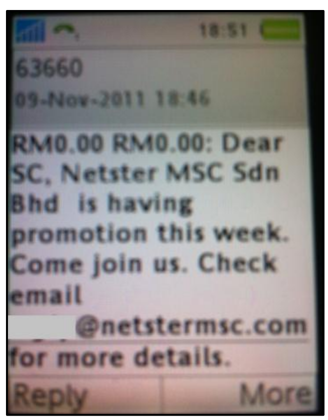


Figure 4.33: Target's Received SMS

5 Sales & Marketing - Lead

The Lead module is for user to **create and store details of Lead**.

Lead Listing

To view **Lead** Listing, click at the **Sales & Marketing > Lead** menu at the Main Menu bar.

Figure 5.1: Lead Menu in Main Menu

Page will load the list of the **Lead** available in the system.

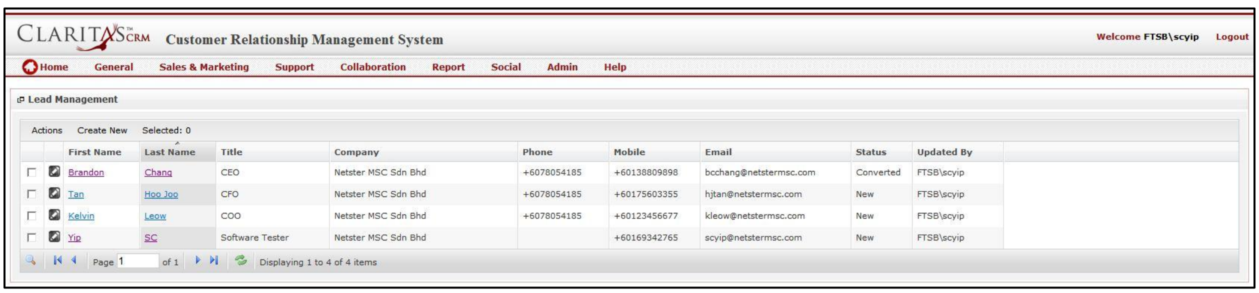


Figure 5.2: Lead Listing

To view the Lead Details, click at the <u>First Name</u> or <u>Last Name</u> hyperlink in First Name or Last Name column.

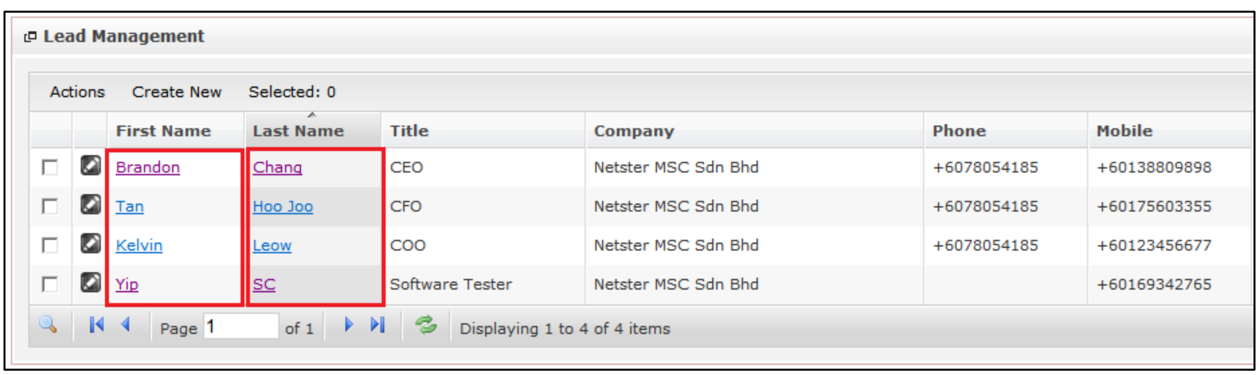


Figure 5.3: Lead First Name and Last Name Hyperlinks

After clicking the <u>First Name</u> or <u>Last Name</u> hyperlink, page will navigate to the **Lead Management Detail** page which displays all the details of the Lead include related **Activities**, **History** and **Campaigns**.

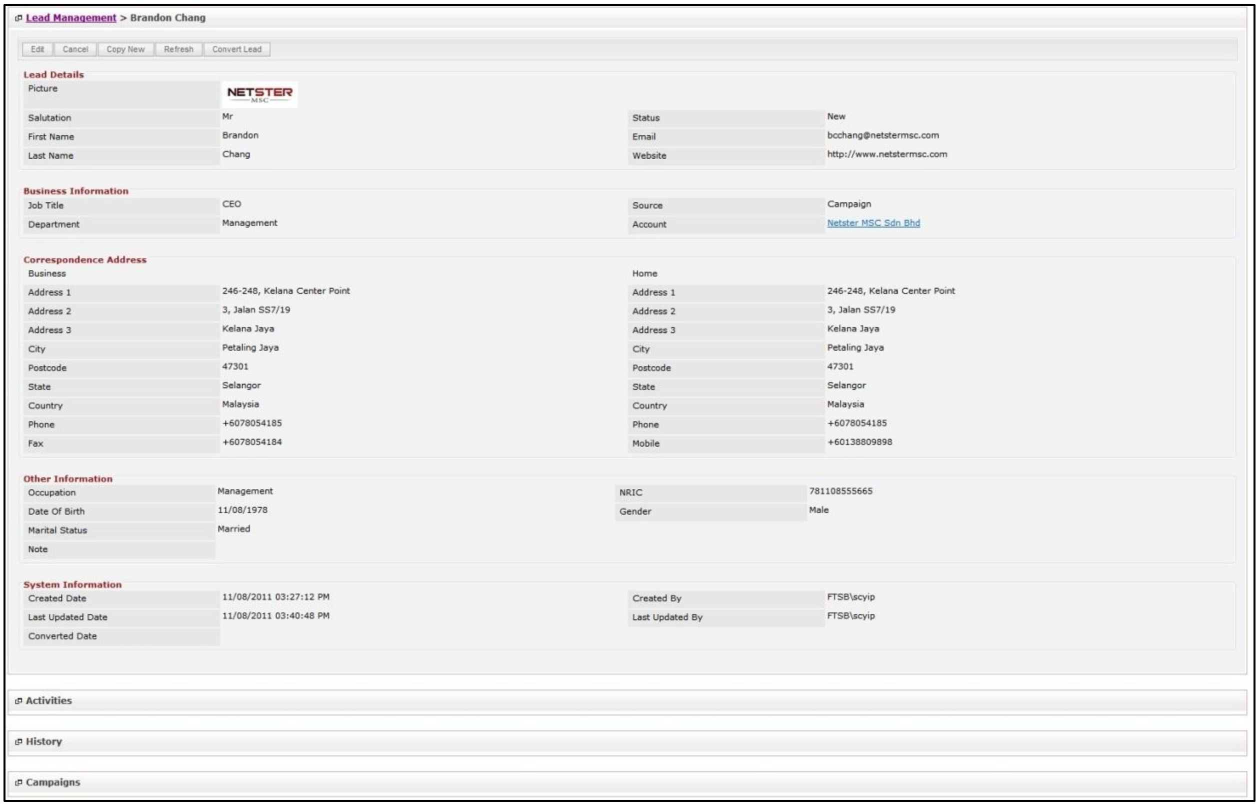


Figure 5.4: Lead Management Detail Page

To copy the entire record and save as a new record, click Copy New button at **Lead Management Detail** page.

To refresh the page, click at the Refresh button.

To convert the Lead, click at the Convert Lead button. A Contact Management window will pop up for user to edit existing details, create new Account and Create New Opportunity for that particular Lead.

Related Topics: *See "Convert Lead"*

To create a new Lead, click at Create New menu at the top of the Lead Listing.

Figure 5.5: Create New Lead Menu

After clicking Create New menu, page will navigate to **Lead Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Lead Management Detail** page or click Cancel button to cancel creating and navigates back to the **Lead Listing** page.

Related Topics*: See "Create New Lead"*

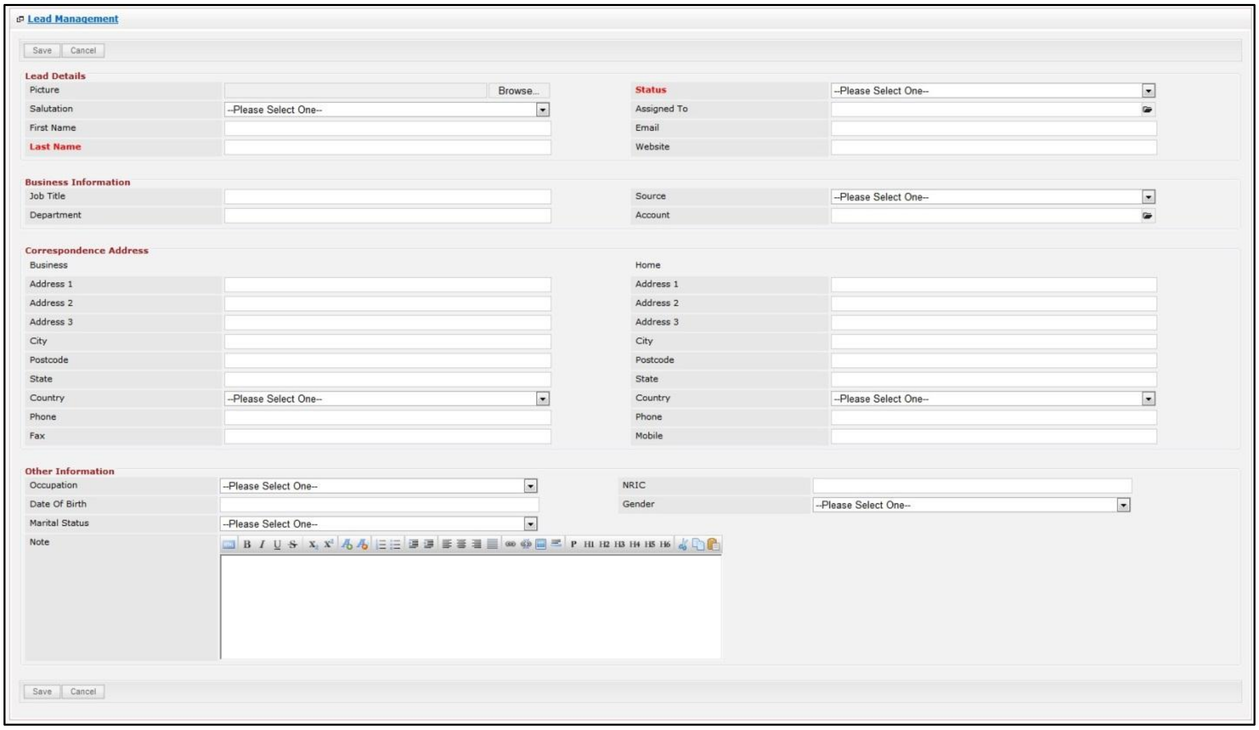


Figure 5.6: Lead Management Create New Page

To **delete** a lead, select the record and click **Actions > Delete**.

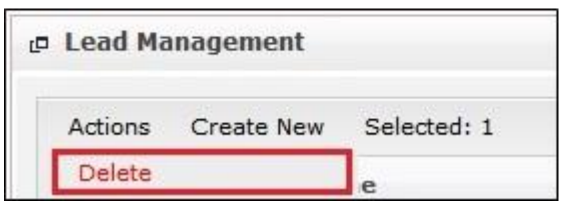


Figure 5.7: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 5.8: Message Showing Lead Deleted Successfully

Deleted lead will **no longer** be displayed in Lead Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

Figure 5.9: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

Figure 5.10: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

Figure 5.11: Actions > Unselect (All Pages) Menu

To go to the First Page of the listing, click at the **First Page**  button.

To go to the Previous Page of the listing, click at the **Previous Page**  button.

To go to the Next Page of the listing, click at the **Next Page**  button.

To go to the Last Page of the listing, click at the **Last Page**  button.

To refresh the listing page, click at the **Refresh**  button.

To search for record/s, click at the **Search** button. An **Advance Search** section will expand at the bottom of the listing for user to select the search field and enter search value.

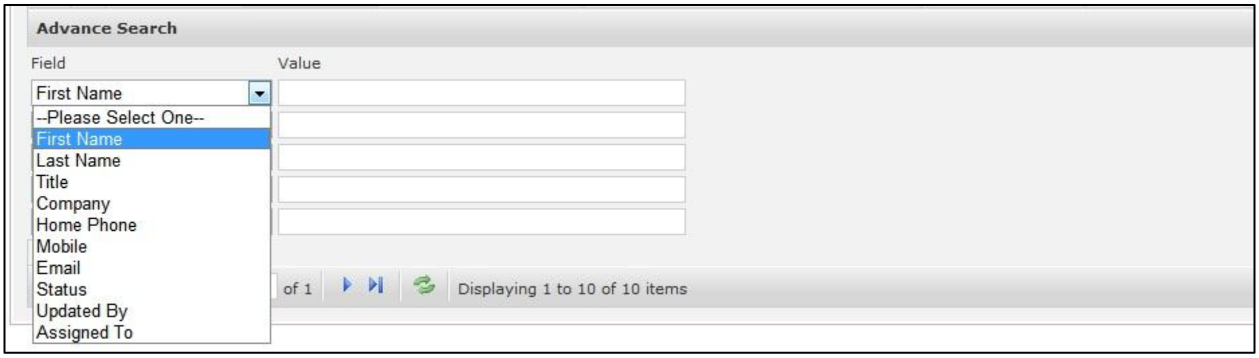


Figure 5.12: Lead Advance Search

To edit the details of the Lead, click at the **Edit** button or click the Edit button in **Lead Management Detail** page. After clicking at the **Edit** button page will navigate to the **Lead Management Edit** page.

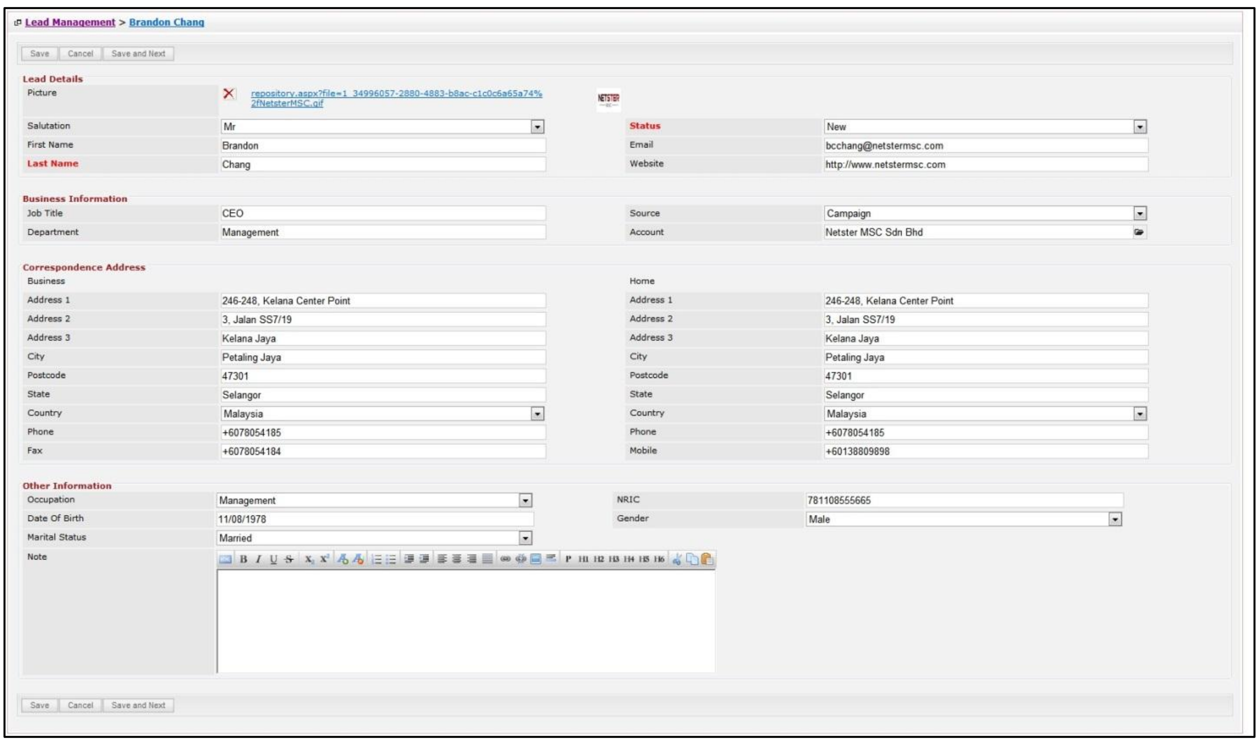


Figure 5.13: Lead Management Edit Page

Edit the relevant details and click Save button to save the changes and navigates back to **Lead Management Detail** page or click Save and Next button to save the changes and navigates to the **Lead**

Management Edit page of the next Lead. Or click Cancel button to cancel editing and navigates back to the **Lead Management Detail** page.

***Related Topics**: See "[Edit Lead](#)"*

Create New Lead

To create new lead, click at the **Sales & Marketing > Lead** menu at the Main Menu bar. Then click the Create New menu at the top of the **Lead Listing**. After clicking Create New menu, page will navigate to **Lead Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Lead Management Detail** page.

There are **four** main sections to be filled in to create a new Lead: **Lead Details**, **Business Information**, **Correspondence Address** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Lead Details**

- Compulsory fields: **Last Name**, **Status**

Figure 5.14: Create Lead - Lead Details

- Picture: User is able to upload a Contact picture. Formats allowed for Picture are: **.jpg**, **.png**, **.bmp** and **.gif**. System does not allow any other format that is not stated.
- **Last Name** field will be the Last Name of Lead for identification.
- **Status** field is the status of the Campaign created; Options available are: **New**, **Cold**, **Warm**, **Converted**, **Recycled** or **Dead**.

2) **Business Information**

- For user to enter the related Business Information of the Lead

Figure 5.15: Create Lead – Business Information

3) **Correspondence Address**

- For user to enter the Correspondence Address of the Lead

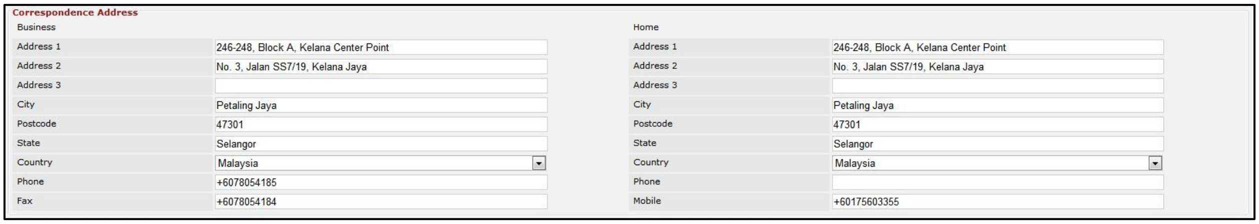


Figure 5.16: Create Lead – Correspondence Address

4) **Other Information**

- For user to enter any related Other Information of the Lead.

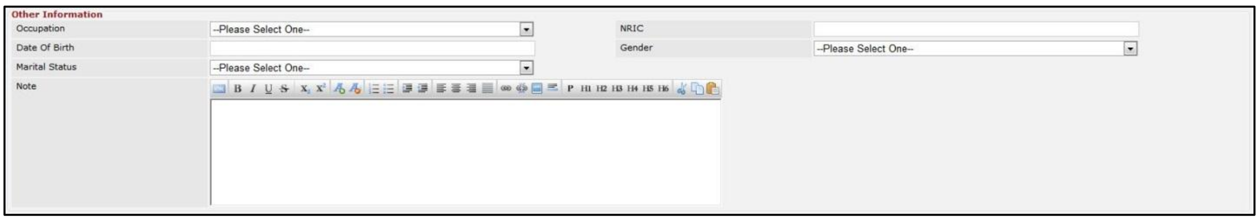
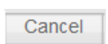


Figure 5.17: Create Lead – Other Information

To cancel creating New Lead, click  button and navigates back to the **Lead Listing** page.

Edit Lead

To edit lead details, click at the the **Sales & Marketing > Lead** menu at the Main Menu bar. Click at the **Edit**  button in **Lead Listing** page or click at the Lead Name hyperlink in **Lead Listing** page then click the  button in **Lead Management Detail** page. After clicking the **Edit**  button or  button, page will navigate to **Lead Management Edit** page. Edit the relevant details and click  button to save the changes and navigates back to **Lead Management Detail** page or click  button to save the changes and navigates to the **Lead Management Edit page** for the next record.

There are **four** main sections to be edited: **Lead Details**, **Business Information**, **Correspondence Address** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Lead Details**

- Compulsory fields: **Last Name**, **Status**

Figure 5.18: Edit Lead - Lead Details

- Picture: User is able to upload a Contact picture. Formats allowed for Picture are: **.jpg**, **.png**, **.bmp** and **.gif**. System does not allow any other format that is not stated.
- **Last Name** field will be the Last Name of Lead for identification.
- **Status** field is the status of the Campaign created; Options available are: **New**, **Cold**, **Warm**, **Converted**, **Recycled** or **Dead**.

2) **Business Information**

- For user to enter the related Business Information of the Lead

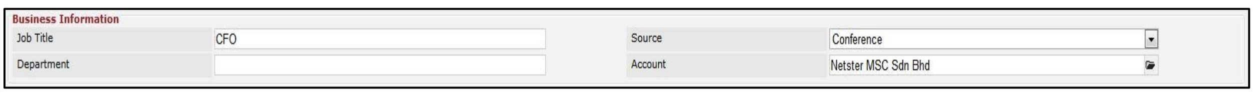


Figure 5.19: Edit Lead – Business Information

3) **Correspondence Address**

- For user to enter the Correspondence Address of the Lead

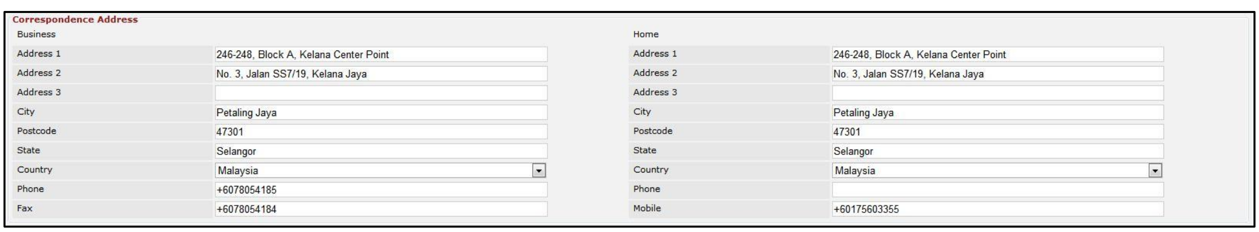


Figure 5.20: Create Lead – Correspondence Address

4) **Other Information**

- For user to enter any related Other Information of the Lead.

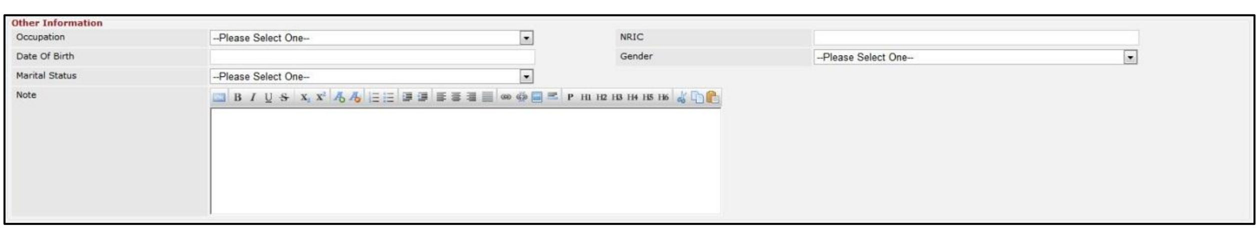
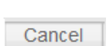


Figure 5.21: Create Lead – Other Information

To cancel editing Lead, click 

button and navigates back to the **Lead Listing** page.

Convert Lead

To convert Lead status, click at the Convert Lead button. A Contact Management window will pop up for user to edit existing details, create new Account and Create New Opportunity for that particular Lead.

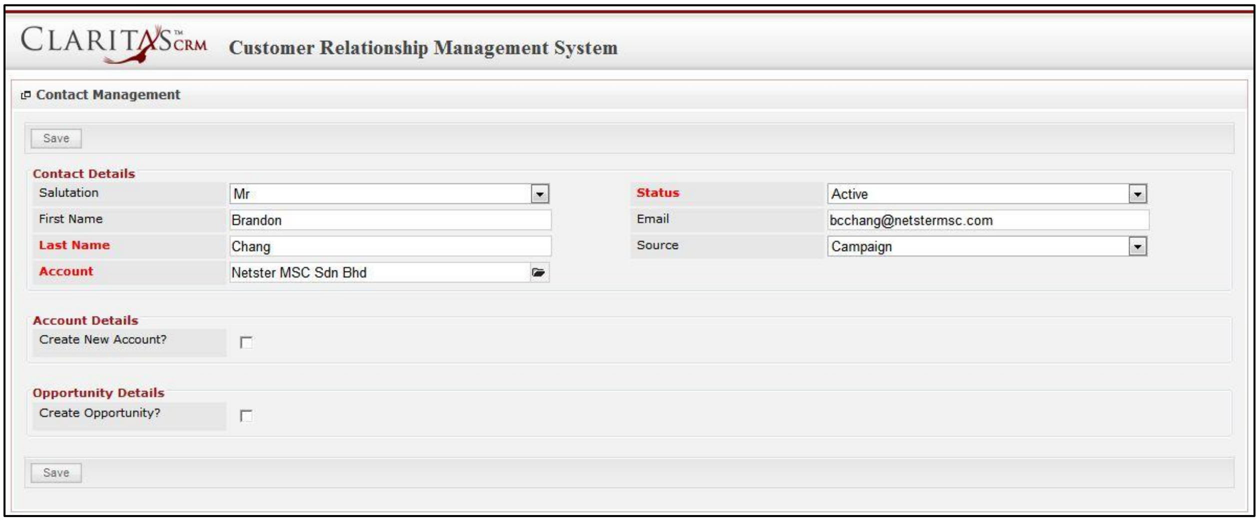


Figure 5.22: Convert Lead - Contact Management Popup

Edit the existing details of the Lead and click Save button to save the changes and close the Contact Management popup window. Notice that the status of the Lead had changed.

Figure 5.23: Convert Lead - Status Changed to "Converted"

To create New Account while converting the Lead, check the Create New Account? checkbox. Account panel will expand, displaying fields for user to enter.

Figure 5.24: Account Details Panel Expanded

Enter the details and click Save button to save the new Account details or continue entering the details for Opportunity.

To create New Opportunity while converting the Lead, check the Create New Opportunity? checkbox. Opportunity Details panel will expand, displaying fields for user to enter.

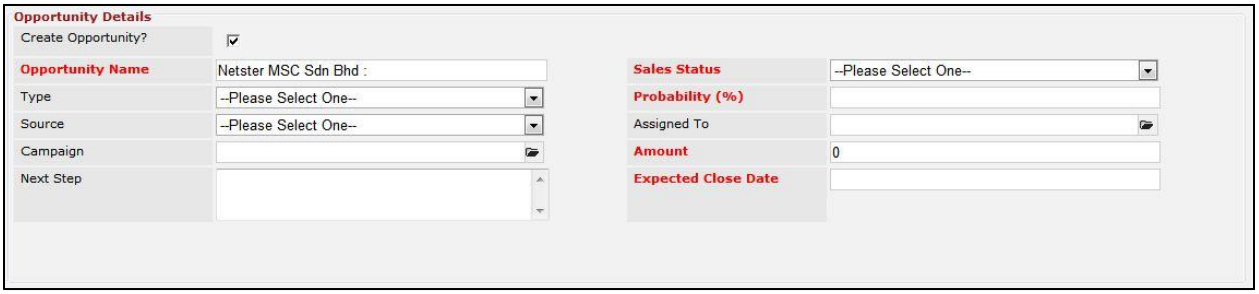


Figure 5.25: Opportunity Details Panel Expanded

Enter the details and click Save button to save the new Opportunity details or continue entering the details for Account.

Details of Converted Lead will be disabled except Status field.

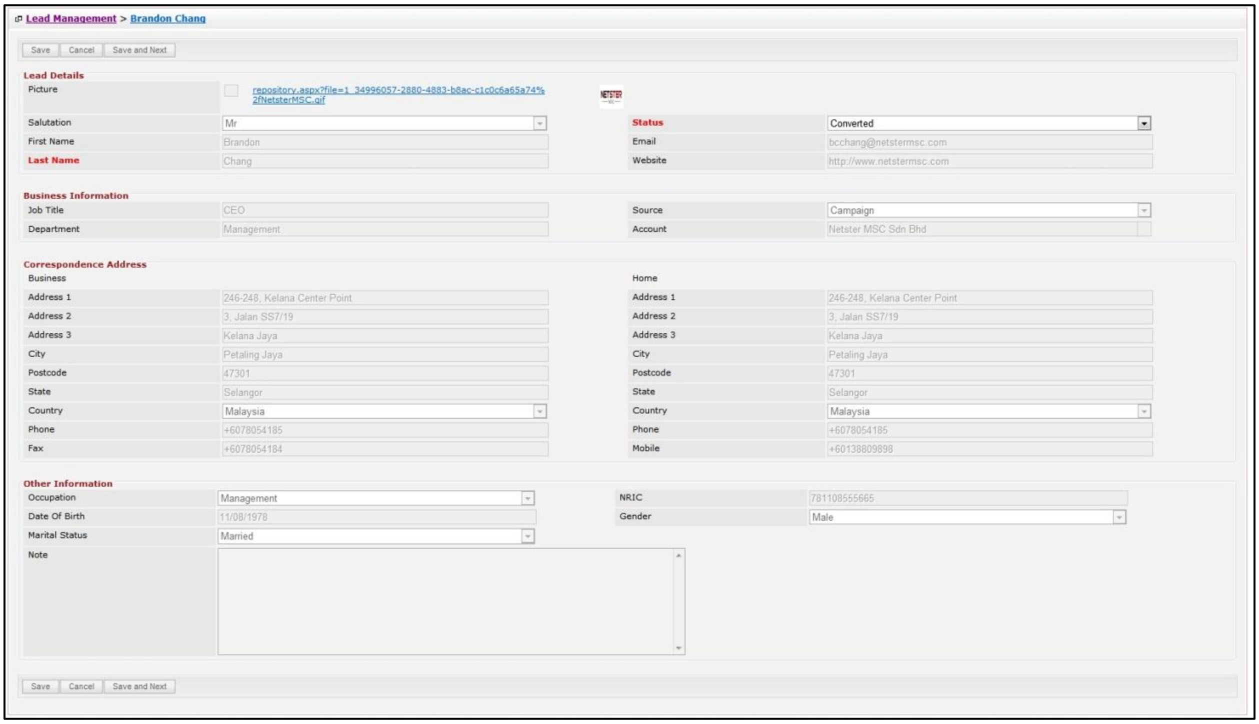


Figure 5.26: Converted Lead Details Disabled

Lead – Activities Subpanel

This subpanel contains any activities related to the lead. **Call**, **Meeting** and **Task** created will be displayed in this **Activities** subpanel.

Lead – Activities Subpanel (New Call)

To create a New Call related to a Lead, click at the New Call menu at **Activities** subpanel. Once New Call menu is clicked, a Call Management window will pop up for user to create a New Call. Enter the details of the Call and click Save button to create the New Call. Or click Cancel menu to cancel creating New Call.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

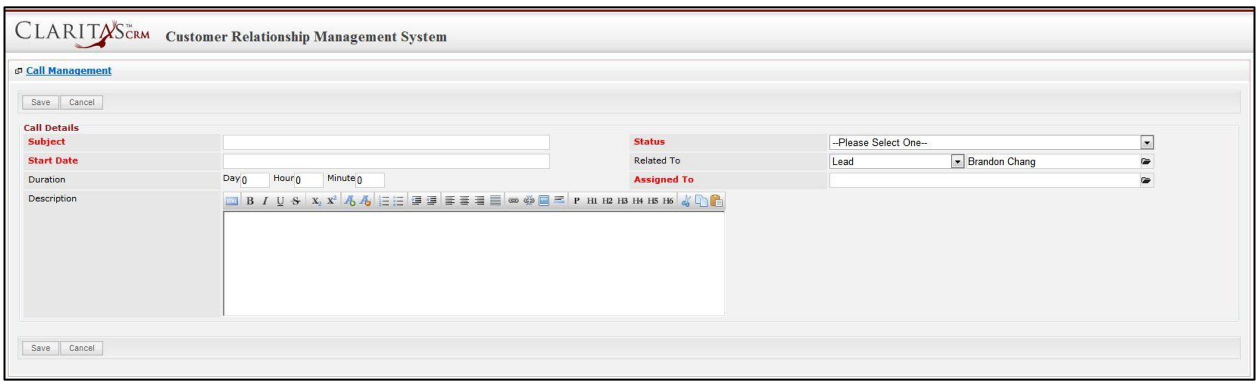


Figure 5.27: New Call Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Lead**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Call. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Call is created. Click at the Done menu to set the date and time.

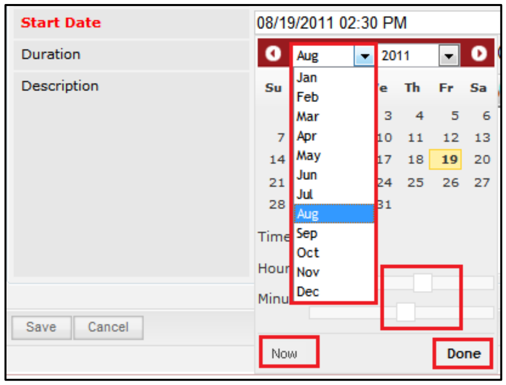


Figure 5.28: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Call for the related Lead. There are two ways of entering the Assigned To field:

  i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 5.29: Assigned To Field Auto Complete Dropdown

  ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

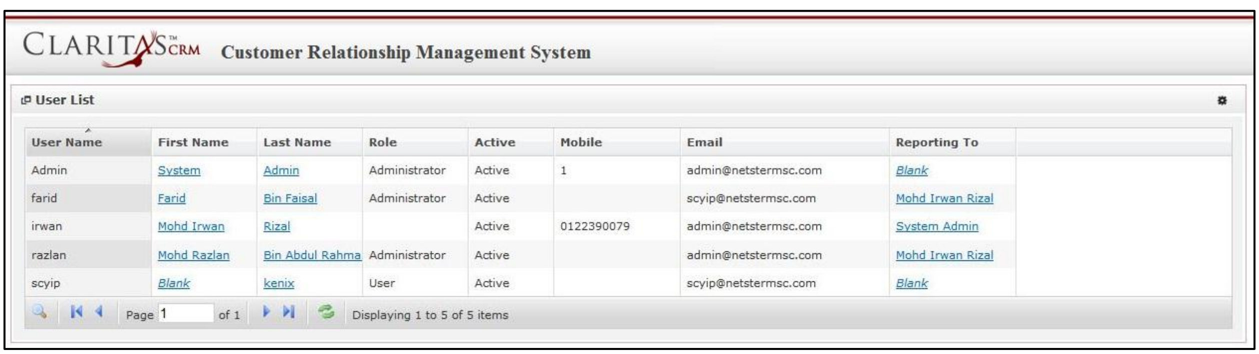


Figure 5.30: Assigned To Popup

- After a New Call is created, the subpanel will auto-refresh and display the newly-created Call.

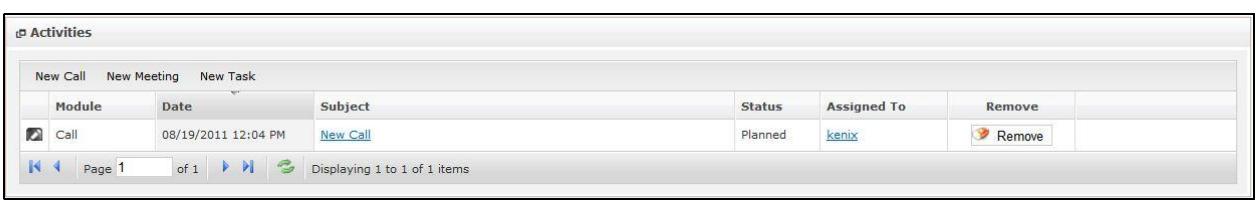


Figure 5.31: Activities Subpanel List New Call

To **cancel creating New Call**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Call and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Call.

Lead – Activities Subpanel (New Meeting)

To create a New Meeting related to a Lead, click at the New Meeting menu at **Activities** subpanel. Once New Meeting menu is clicked, a Meeting Management window will pop up for user to create a New Meeting. Enter the details of the Meeting and click Save button to create the New Meeting. Or click Cancel menu to cancel creating New Meeting.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

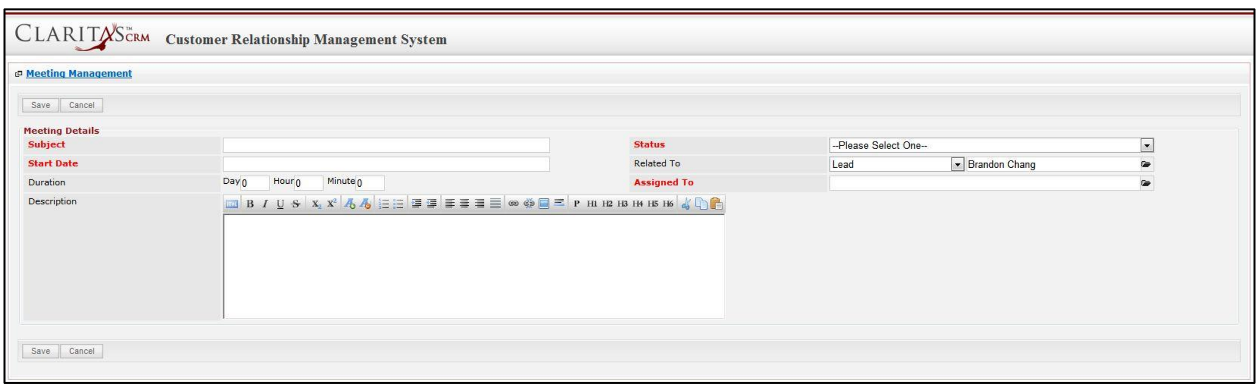


Figure 5.32: New Meeting Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Lead**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Meeting. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Meeting is created. Click at the Done menu to set the date and time.

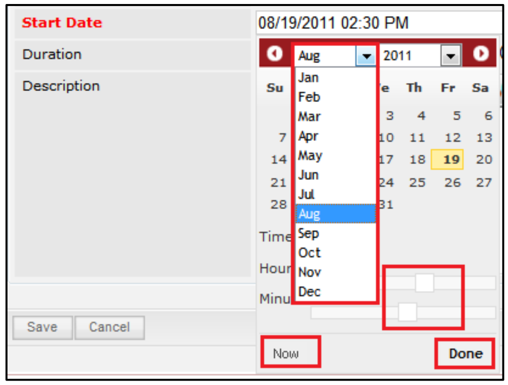


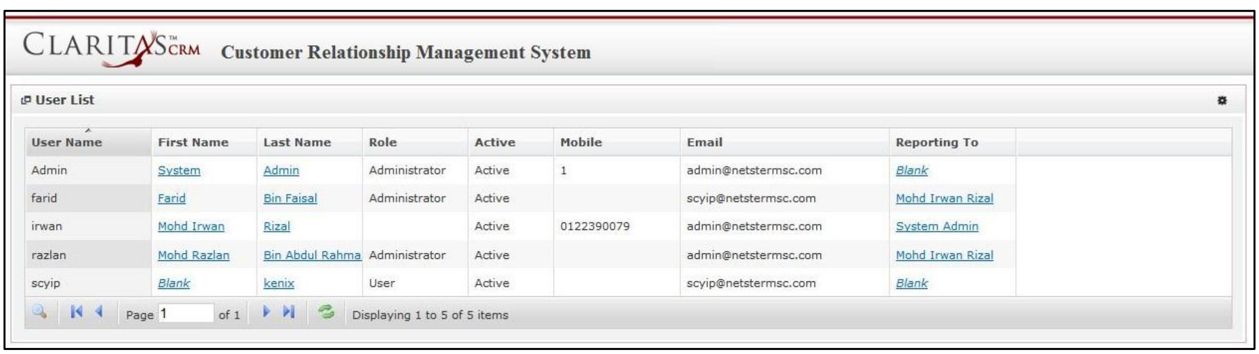
Figure 5.33: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Meeting for the related Lead. There are two ways of entering the **Assigned To** field:

v. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 5.34: Assigned To Field Auto Complete Dropdown

vi. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Figure 5.35: Assigned To Popup

- After a New Meeting is created, the subpanel will auto-refresh and display the newly-created Meeting.

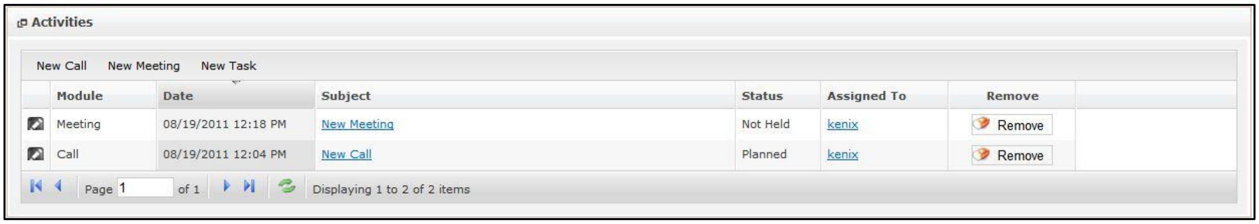


Figure 5.36: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Meeting and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Meeting.

Lead – Activities Subpanel (New Task)

To create a New Task related to a Lead, click at the New Task menu at **Activities** subpanel. Once New Task menu is clicked, a Task Management window will pop up for user to create a New Task. Enter the details of the Task and click Save button to create the New Task. Or click Cancel menu to cancel creating New Task.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

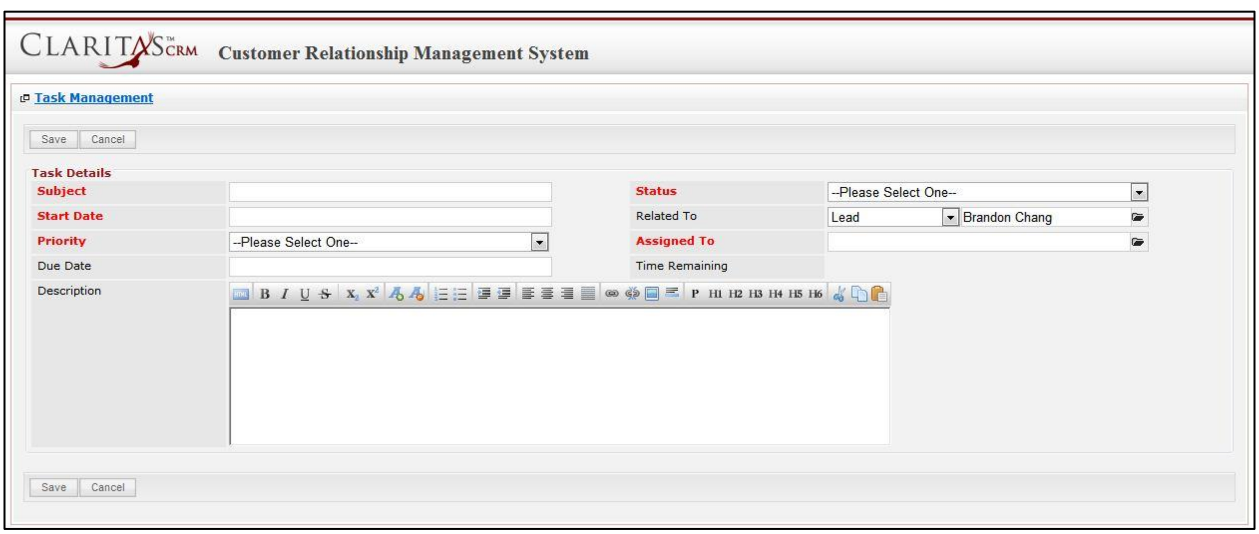


Figure 5.37: New Task Management Popup

- **Related To** field will auto populate the name of the related **Lead**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Task. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Task is created. Click at the Done menu to set the date and time.

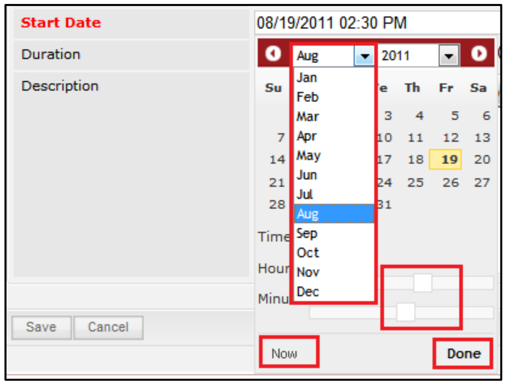


Figure 5.38: Start Date Time

- **Priority** field once selected will auto-populate the **Due Date** field and **Time Remaining** accordingly.
- There are five **Statuses** available for Task- **Not Started**, **In Progress**, **Completed**, **Pending Input**, and **Deferred.**
- **Assigned To** field is to assign a User to in charge of the Task for the related Lead. There are two ways of entering the Assigned To field:
  - i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

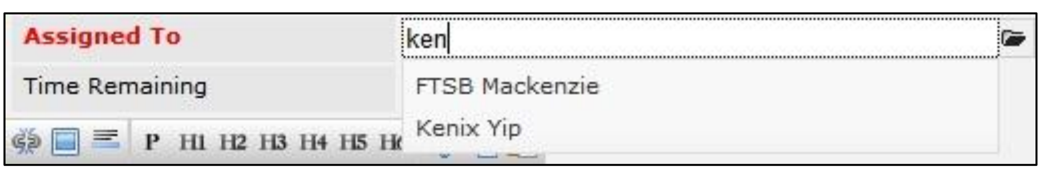
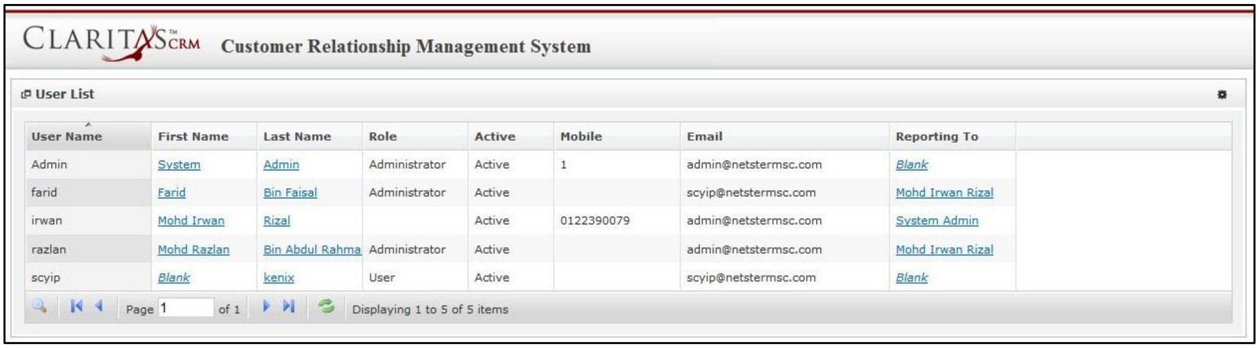


Figure 5.39: Assigned To Field Auto Complete Dropdown

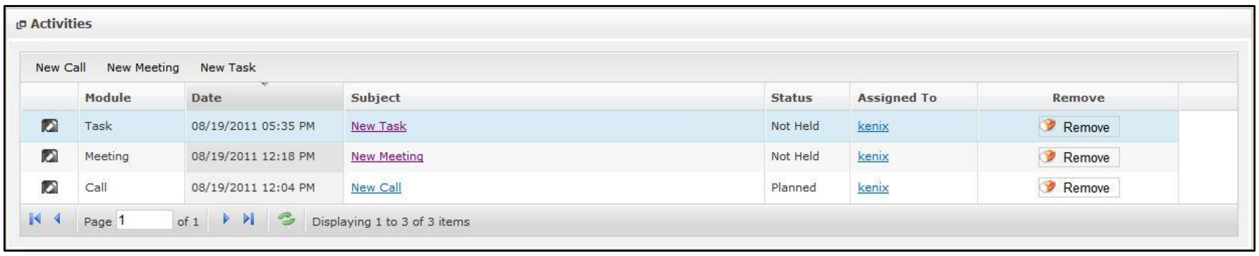
  - ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Figure 5.40: Assigned To Popup

- After a New Task is created, the subpanel will auto-refresh and display the newly-created Task.



Module	Date	Subject	Status	Assigned To	Remove
Task	08/19/2011 05:35 PM	New Task	Not Held	kenix	Remove
Meeting	08/19/2011 12:18 PM	New Meeting	Not Held	kenix	Remove
Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Figure 5.41: Activities Subpanel List New Task

To **cancel creating New Task**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Task and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Task.

Lead – History Subpanel

This subpanel contains any history or note related to the lead.

Lead – History Subpanel (New Note)

To create a New Note related to a Lead, click at the New Note menu at **History** subpanel. Once New Note menu is clicked, a Note Management window will pop up for user to create a New Note.

Enter the details of the Note and click Save button to create the New Note.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

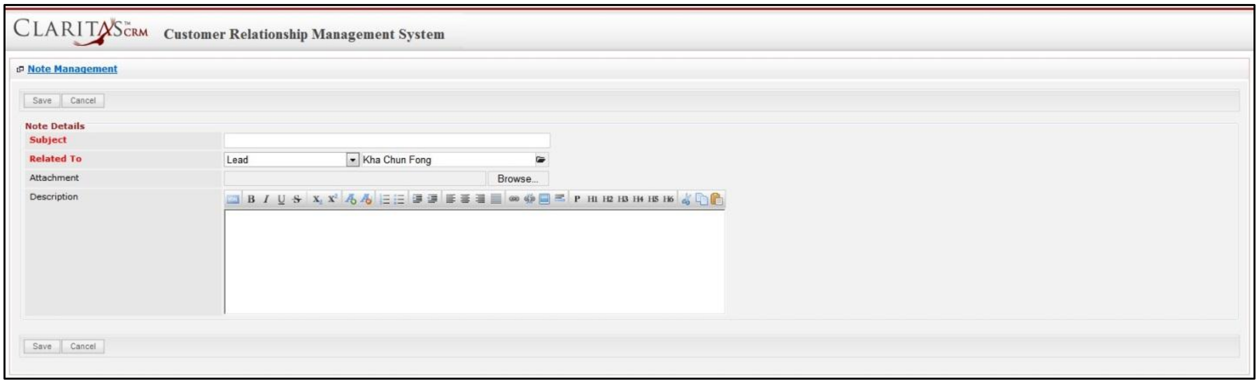


Figure 5.42: New Note Management Popup

- Compulsory fields: **Subject**, and **Related To**.
- **Related To** field will auto populate the name of the related **Lead**.
- **Attachment** field allow file extensions are as below (format that is not stated are not allowed to be uploaded):
    - **Documents:** .doc, .docx, .xls, .xlsx, . rtf, .txt, .pdf, .ppt, .pptx
    - **Pictures:** .jpg, .bmp, .png, .bmp, .gif
    - **Audio:** .mp3, .wma
    - **Video: .**3gp, .mp4, .rmvb, .avi, .flv
    - **Archive:** .zip, .rar
- After a New Note is created, the subpanel will auto-refresh and display the newly-created Note.

Figure 5.43: History Subpanel List New Note

To **cancel creating New Note**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Note and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Note.

Lead – Campaigns Subpanel

This subpanel contains any campaign related to the lead.

The related campaign will only be displayed in this Campaign Subpanel if the lead is added to the Campaign in Campaign Management Detail page.

6 Sales & Marketing - Opportunity

This module is to **create and store Opportunity details**.

Opportunity Listing

To view Opportunity Listing, click at the **Sales & Marketing > Opportunity** menu at the Main Menu bar.

Figure 6.1: Opportunity Menu in Main Menu

Page will load the list of the Opportunity available in the system.

Figure 6.2: Opportunity Listing

To view the Opportunity Details, click at the <u>Name</u> hyperlink in Name column.

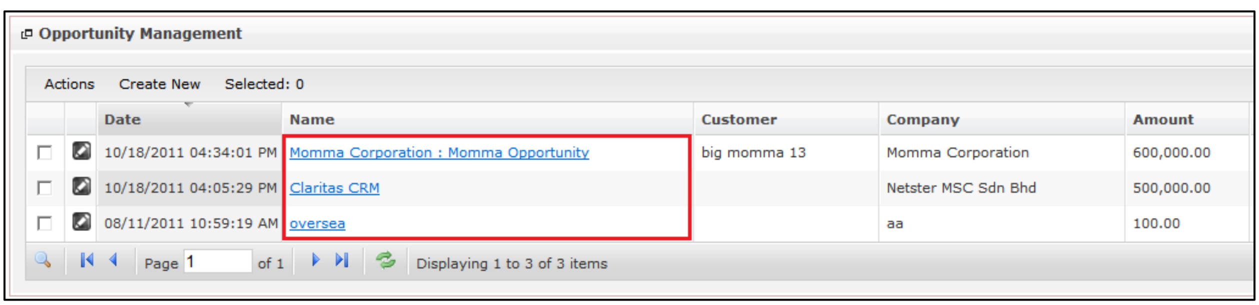


Figure 6.3: Name Hyperlink

After clicking the <u>Name</u> hyperlink, page will navigate to the **Opportunity Management Detail** page which displays all the details of the Opportunity.

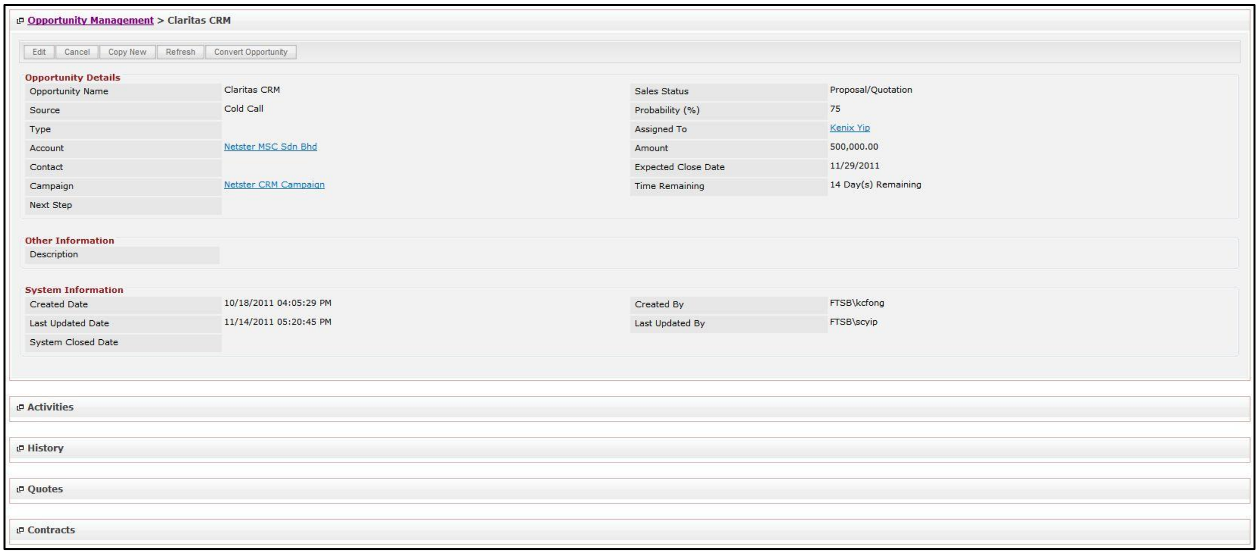


Figure 6.4: Opportunity Management Detail Page

To copy the entire record and save as a new record, click Copy New button at **Opportunity Maintenance Detail** page.

To refresh the page, click at the Refresh button.

To convert the Lead, click at the Convert Opportunity button. A Product Management window will pop up for user to edit existing details for that particular Opportunity. ***Related Topics:*** *See "Convert Opportunity"*

To create a new Opportunity, click at Create New menu at the top of the Opportunity Listing.

Figure 6.5: Create New Opportunity Menu

After clicking Create New menu, page will navigate to **Opportunity Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Opportunity Management Detail** page or click Cancel button to cancel creating and navigates back to the **Opportunity Listing** page.

Related Topics*: See "Create New Opportunity"*

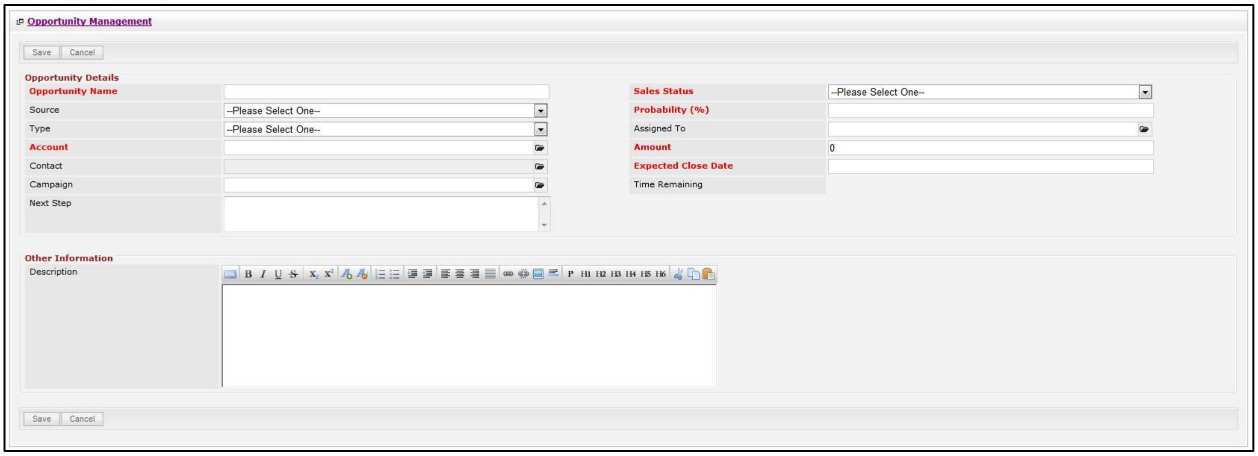


Figure 6.6: Opportunity Management Create New Page

To **delete** an opportunity, select the record and click **Actions > Delete**.

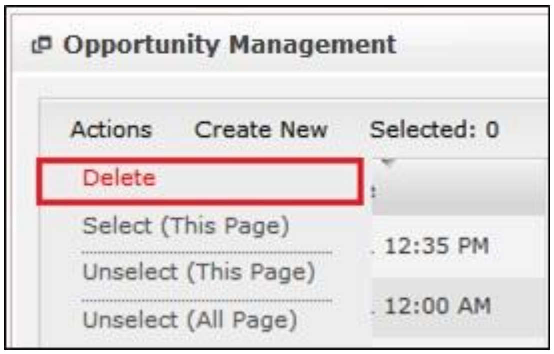


Figure 6.7: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 6.8: Message Showing Opportunity Deleted Successfully

Deleted opportunity will **no longer** be displayed in Opportunity Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

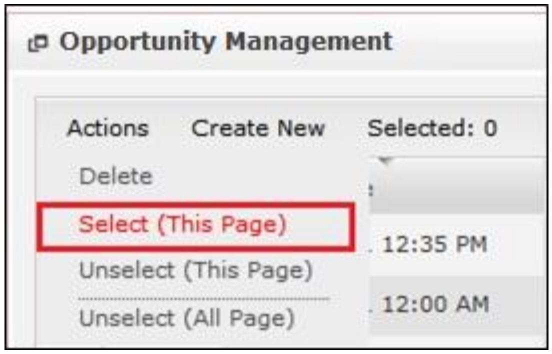


Figure 6.9: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

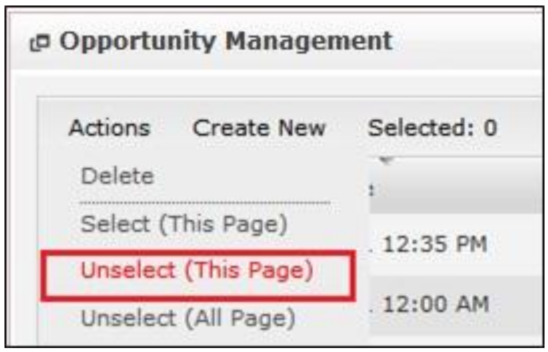


Figure 6.10: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

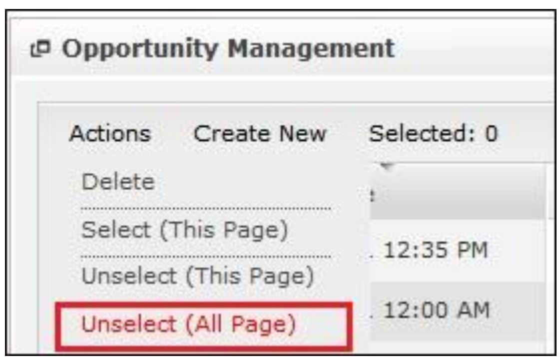


Figure 6.11: Actions > Unselect (All Pages) Menu

To go to the First Page of the listing, click at the **First Page**  button.

To go to the Previous Page of the listing, click at the **Previous Page**  button.

To go to the Next Page of the listing, click at the **Next Page**  button.

To go to the Last Page of the listing, click at the **Last Page**  button.

To refresh the listing page, click at the **Refresh**  button.

To search for record/s, click at the **Search** button. An **Advance Search** section will expand at the bottom of the listing for user to select the search field and enter search value.

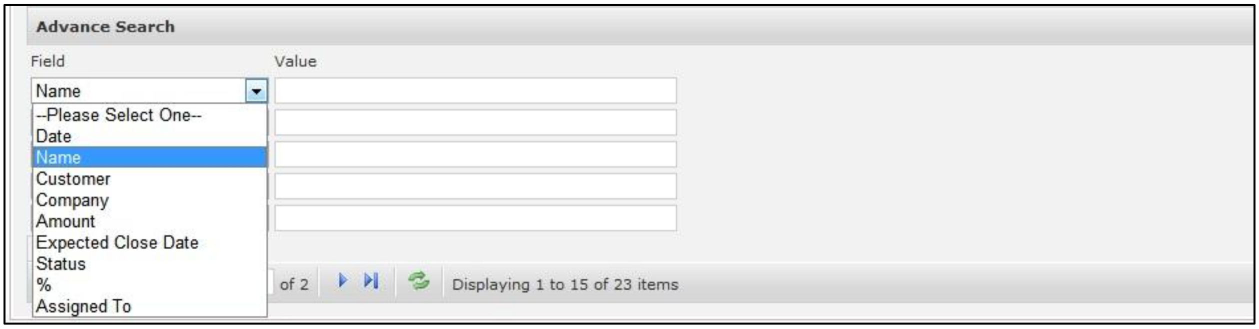


Figure 6.12: Opportunity Advance Search

To edit the details of the Opportunity, click at the **Edit** button or click the Edit button in **Opportunity Management Detail** page. After clicking at the **Edit** button page will navigate to the **Opportunity Management Edit** page.

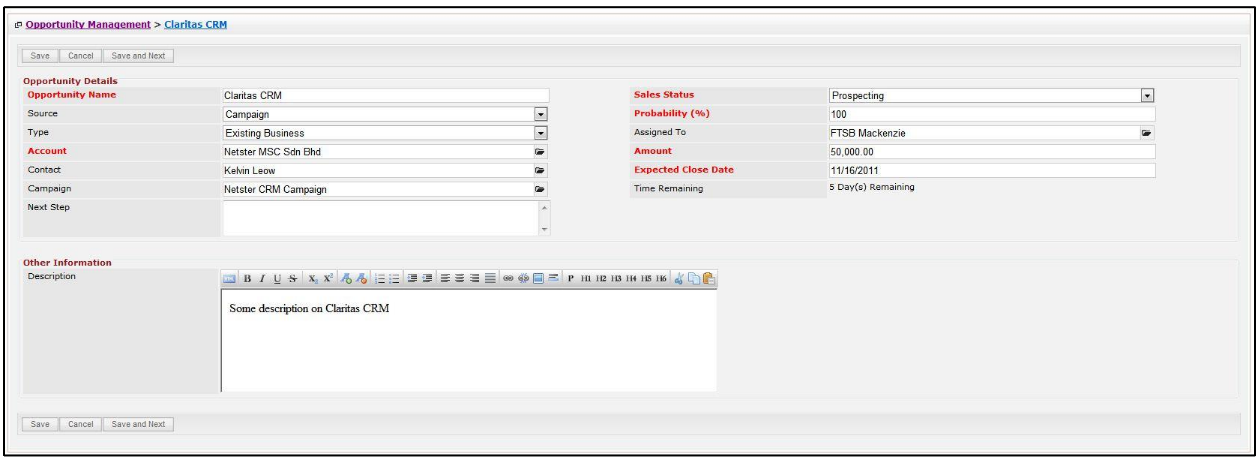


Figure 6.13: Opportunity Management Edit Page

Edit the relevant details and click Save button to save the changes and navigates back to **Opportunity Management Detail** page. Or click Cancel button to cancel editing and navigates back to the **Opportunity Management Detail** page.

***Related Topics**: See "[Edit Opportunity](#) "*

Create New Opportunity

To create new opportunity, click at the **Sales & Marketing > Opportunity** menu at the Main Menu bar. Then click the Create New menu at the top of the **Opportunity Listing**. After clicking Create New menu, page will navigate to **Opportunity Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Opportunity Management Detail** page.

There are **two** sections to be filled in to create a new Opportunity: **Opportunity Details** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

8) **Opportunity Details**

- Compulsory fields: **Opportunity Name**, **Account**, **Sales Status**, **Probability**, **Amount** and **Expected Close Date**.

Figure 6.14: Create Opportunity - Opportunity Details

- **Opportunity Name** field will be the Opportunity Name for identification.
- **Account** field is to assign the Opportunity to the related Account. There are two ways of entering the **Account** field:

    v. Type in the Company Name and wait for the **auto-complete** dropdown of the Account, if the name entered does not match any of the available accounts; the textbox will be auto-cleared. (Click at the Company Name to select the account) **OR**

Figure 6.15: Account Field Auto Complete Dropdown

    vi. Click at the button to open a new popup containing the list of all Accounts. (Click at the Company Name hyperlink to select the account)

Figure 6.16: Account Popup

- **Status** field is the status of the Campaign created; Options available are: **Prospecting**, **Qualification**, **Value Proposition**, **Proposal/Quotation**, **Negotiation**, **Closed Won** or **Closed Lost**.

- **Probability** field is for user to enter the probability that the opportunity will be having.
- **Amount** field is for user to enter the amount that the opportunity will be having.
- **Expected Close Date** field when clicked will populate a calendar for user to select the date for the Opportunity. Click at the **Month** and **Year** dropdown to navigate to the selected date.

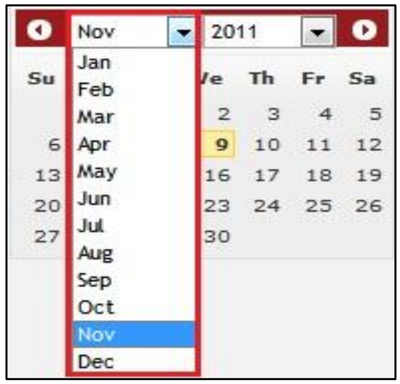


Figure 6.17: Expected Close Date

9) **Description**
   - For user to enter some description or additional information regarding the opportunity. (Optional)

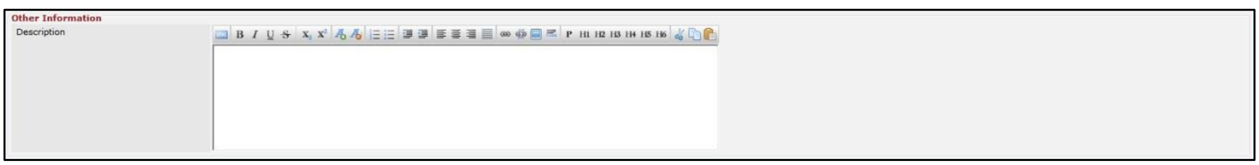


Figure 6.18: Create Opportunity - Other Information

To **cancel creating New Opportunity**, click Cancel button. Page will navigate back to **Opportunity Listing** page.

Edit Opportunity

To edit opportunity details, click at the **Sales & Marketing > Opportunity** menu at the Main Menu bar.

Click at the **Edit** button in **Opportunity Listing** page or click at the <u>Name</u> hyperlink in **Opportunity Listing** page then click the Edit button in **Opportunity Management Detail** page. After clicking the **Edit** button or Edit button, page will navigate to **Opportunity Management Edit** page. Edit the relevant details and click Save button to save the changes and navigates back to **Opportunity**

Management Detail page or click Save and Next button to save the changes and navigates to the **Opportunity Management Edit page** for the next record.

There are **two** sections to be filled in to be edited: **Opportunity Details** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Opportunity Details**

- Compulsory fields: **Opportunity Name**, **Account**, **Sales Status**, **Probability**, **Amount** and **Expected Close Date**.

Figure 6.19: Edit Opportunity - Opportunity Details

- **Opportunity Name** field will be the Opportunity Name for identification.
- **Account** field is to assign the Opportunity to the related Account. There are two ways of entering the **Account** field:

    i. Type in the Company Name and wait for the **auto-complete** dropdown of the Account, if the name entered does not match any of the available accounts; the textbox will be auto-cleared. (Click at the Company Name to select the account) **OR**

Figure 6.20: Account Field Auto Complete Dropdown

    ii. Click at the button to open a new popup containing the list of all Accounts. (Click at the Company Name hyperlink to select the account)

Figure 6.21: Account Popup

- **Status** field is the status of the Campaign created; Options available are: **Prospecting**, **Qualification**, **Value Proposition**, **Proposal/Quotation**, **Negotiation**, **Closed Won** or **Closed Lost**.
- **Probability** field is for user to enter the probability that the opportunity will be having.

- **Amount** field is for user to enter the amount that the opportunity will be having.
- **Expected Close Date** field when clicked will populate a calendar for user to select the date for the Opportunity. Click at the **Month** and **Year** dropdown to navigate to the selected date.

Figure 6.22: Expected Close Date

2) **Description**
   - For user to enter some description or additional information regarding the opportunity. (Optional)

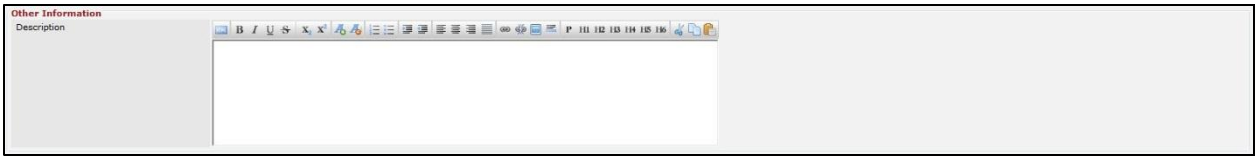
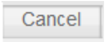


Figure 6.23: Edit Opportunity - Other Information

To **cancel editing New Opportunity**, click  button at **Opportunity Management Detail** page. Page will navigate back to **Opportunity Listing** page.

Convert Opportunity

To convert Opportunity status, click at the  button. A Product Management window will pop up for user to edit existing details for that particular Opportunity.

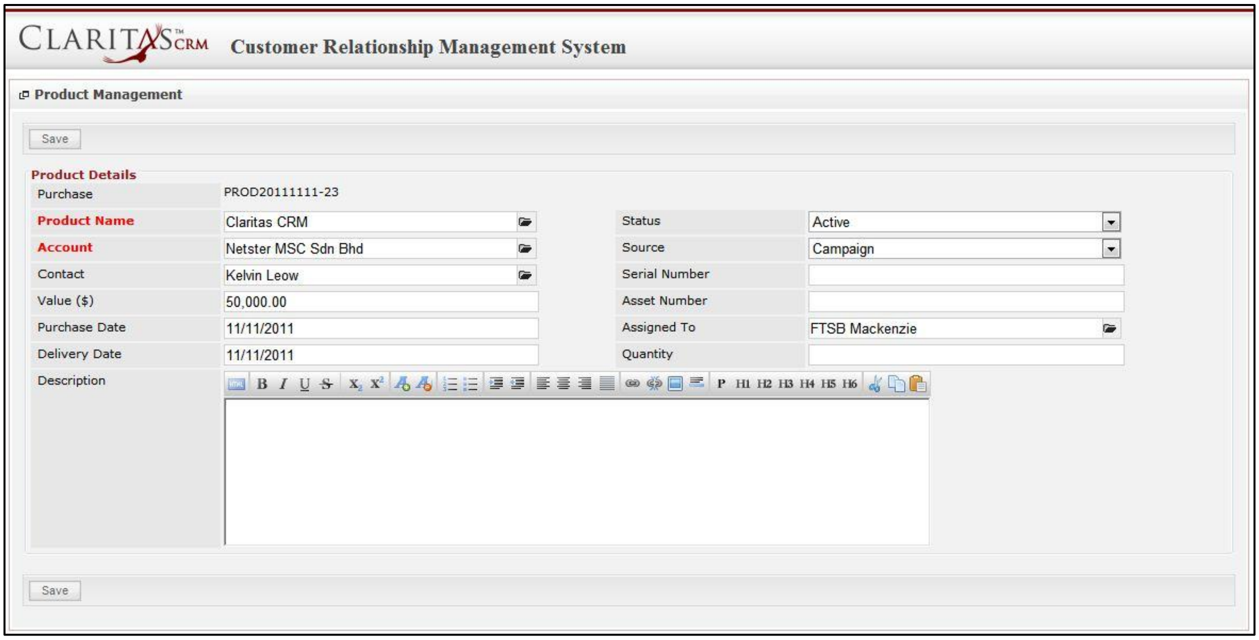


Figure 6.24: Convert Lead - Contact Management Popup

Edit the existing details of the Opportunity and click  button to save the changes and close the Product Management popup window. Notice that the status of the Opportunity had changed.

Figure 6.25: Convert Lead - Status Changed to "Closed Won"

Details of Converted Opportunity will be disabled except Status field.

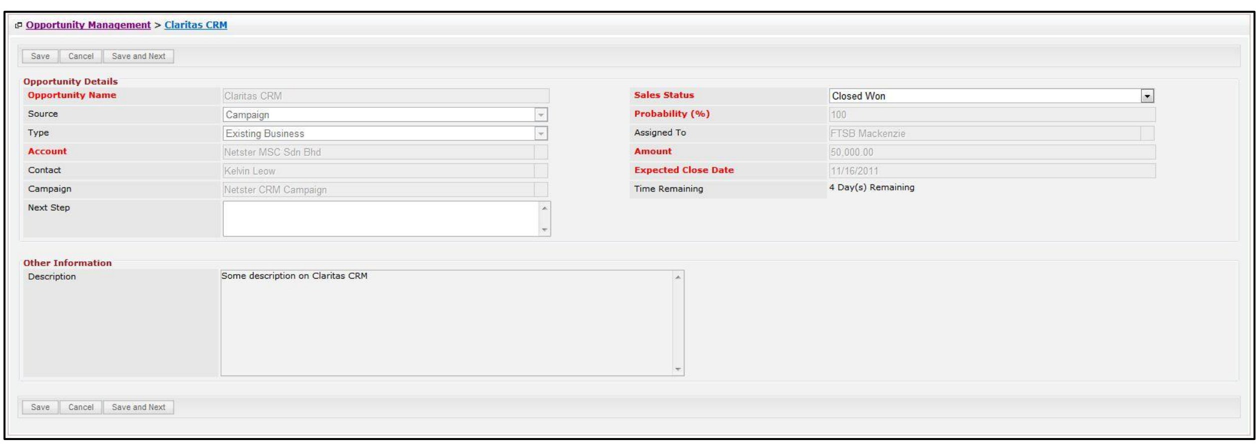


Figure 6.26: Converted Opportunity Details Disabled

Opportunity – Activities Subpanel

This subpanel contains any activities related to the Opportunity. **Call**, **Meeting** and **Task** created will be displayed in this **Activities** subpanel.

Opportunity – Activities Subpanel (New Call)

To create a New Call related to an Opportunity, click at the New Call menu at **Activities** subpanel. Once New Call menu is clicked, a Call Management window will pop up for user to create a New Call. Enter the details of the Call and click Save button to create the New Call. Or click Cancel menu to cancel creating New Call.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

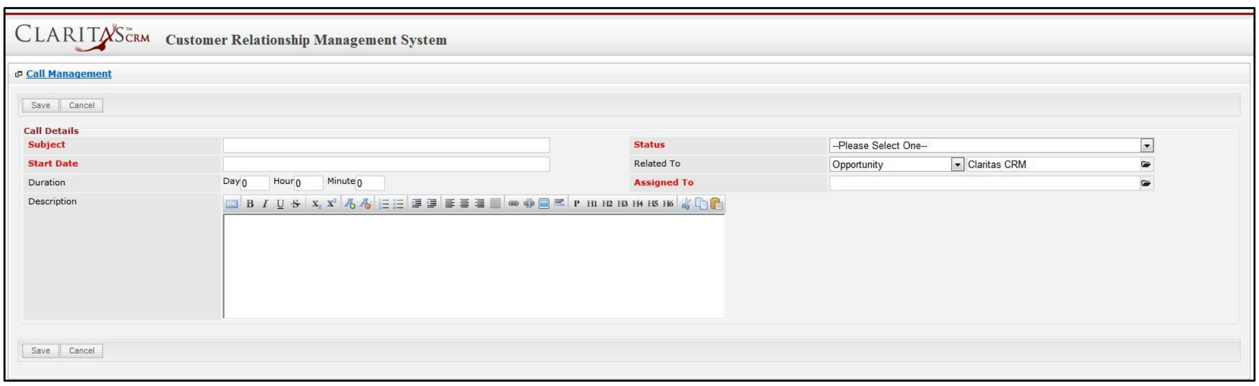


Figure 6.27: New Call Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Opportunity**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Call. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Call is created. Click at the Done menu to set the date and time.

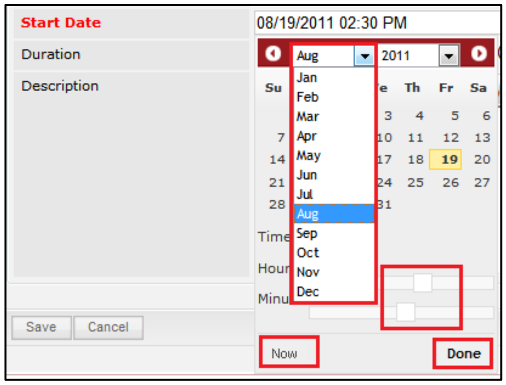


Figure 6.28: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Call for the related Opportunity. There are two ways of entering the Assigned To field:
  v. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 6.29: Assigned To Field Auto Complete Dropdown

  vi. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

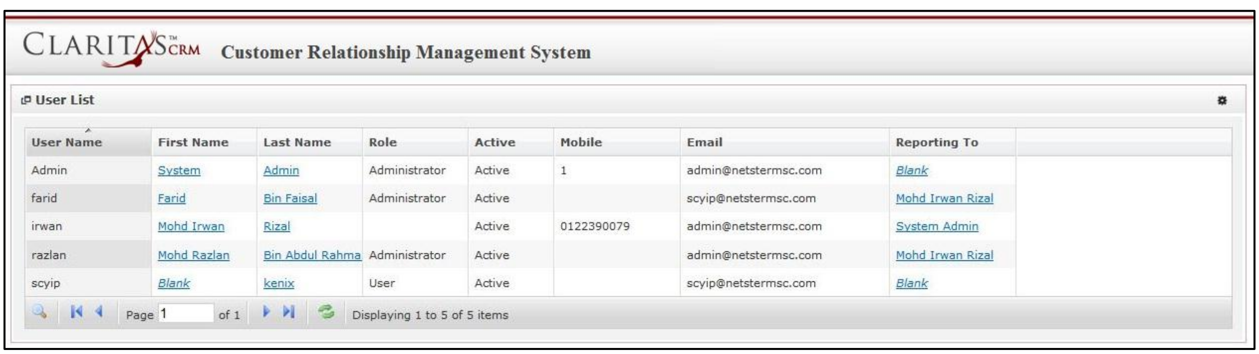


Figure 6.30: Assigned To Popup

- After a New Call is created, the subpanel will auto-refresh and display the newly-created Call.

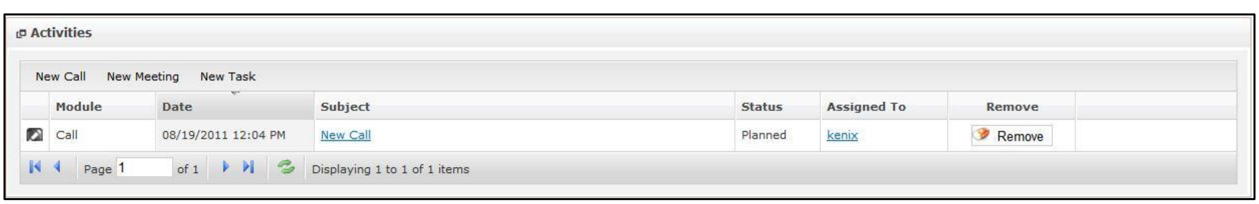


Figure 6.31: Activities Subpanel List New Call

To **cancel creating New Call**, click Cancel button. A confirmation dialog showing “Are you sure you want to close this window?” will prompt user to cancel creating New Call and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Call.

Opportunity – Activities Subpanel (New Meeting)

To create a New Meeting related to an Opportunity, click at the New Meeting menu at **Activities** subpanel. Once New Meeting menu is clicked, a Meeting Management window will pop up for user to create a New Meeting. Enter the details of the Meeting and click Save button to create the New Meeting. Or click Cancel menu to cancel creating New Meeting.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

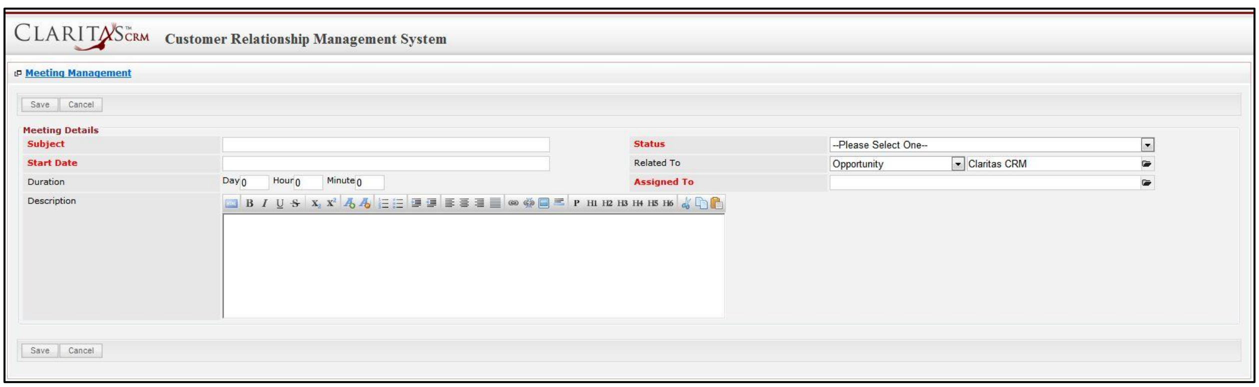


Figure 6.32: New Meeting Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Opportunity**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Meeting. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Meeting is created. Click at the Done menu to set the date and time.

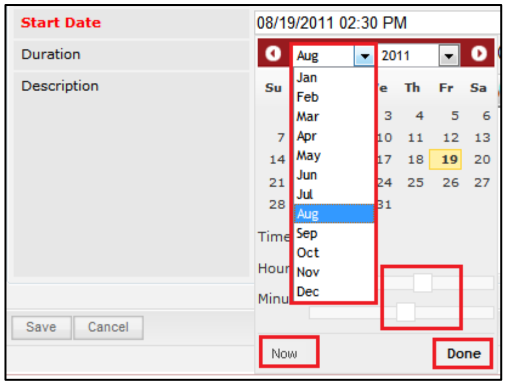


Figure 6.33: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Meeting for the related Opportunity. There are two ways of entering the **Assigned To** field:

vii. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 6.34: Assigned To Field Auto Complete Dropdown

viii. Click at the  button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

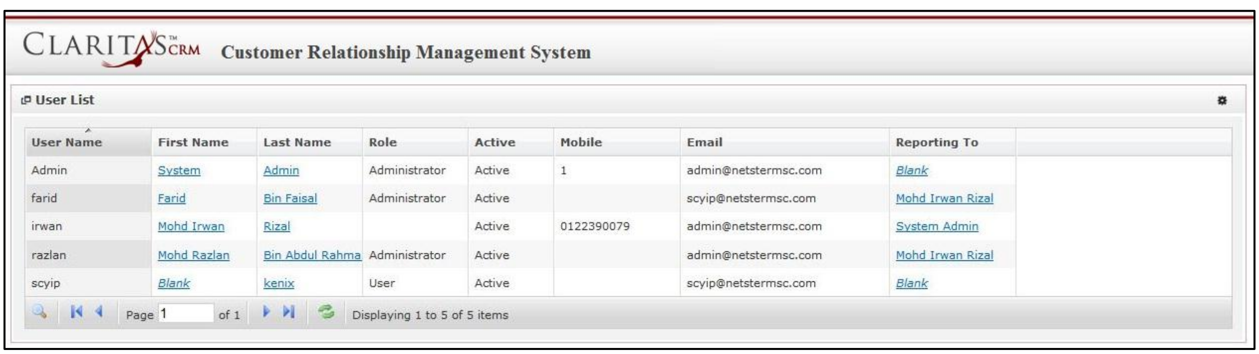


Figure 6.35: Assigned To Popup

- After a New Meeting is created, the subpanel will auto-refresh and display the newly-created Meeting.

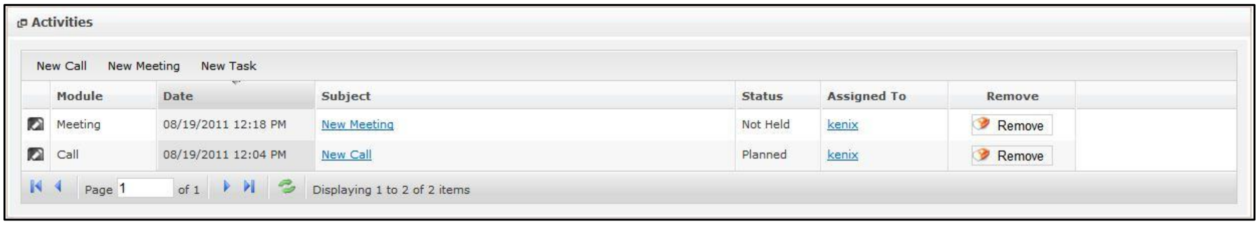


Figure 6.36: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Meeting and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Meeting.

Opportunity – Activities Subpanel (New Task)

To create a New Task related to an Opportunity, click at the New Task menu at **Activities** subpanel. Once New Task menu is clicked, a Task Management window will pop up for user to create a New Task. Enter the details of the Task and click Save button to create the New Task. Or click Cancel menu to cancel creating New Task.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

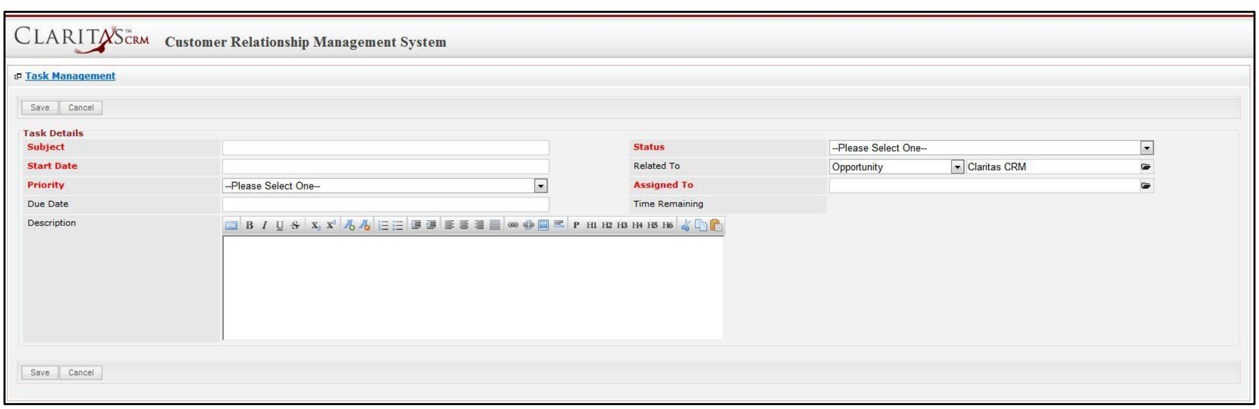


Figure 6.37: New Task Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Priority**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Opportunity**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Task. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time

bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Task is created. Click at the Done menu to set the date and time.

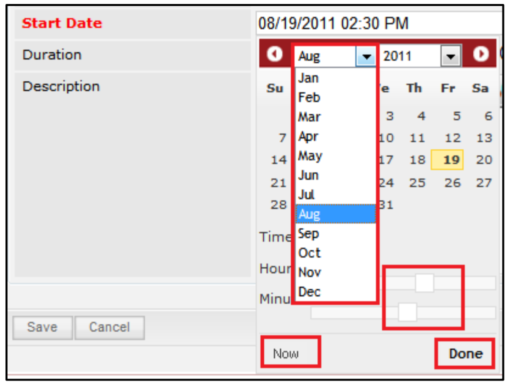


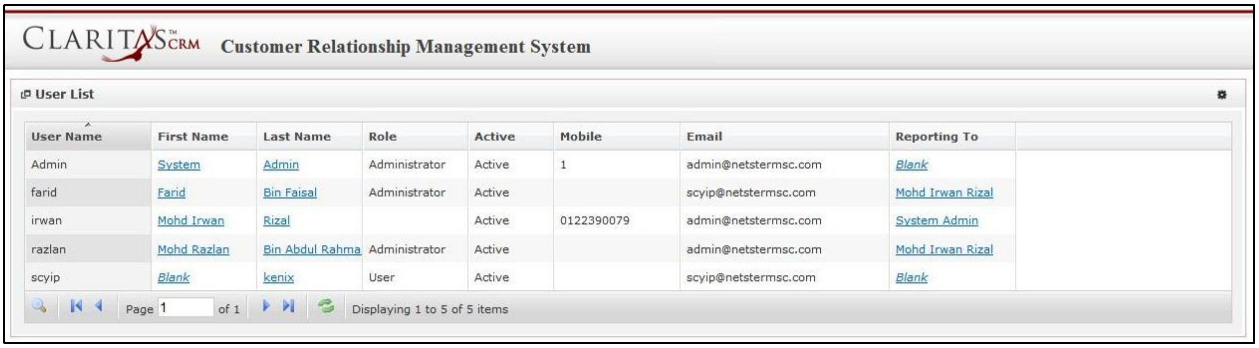
Figure 6.38: Start Date Time

- **Priority** field once selected will auto-populate the **Due Date** field and **Time Remaining** accordingly.
- There are five **Statuses** available for Task- **Not Started**, **In Progress**, **Completed**, **Pending Input**, and **Deferred.**
- **Assigned To** field is to assign a User to in charge of the Task for the related Opportunity. There are two ways of entering the Assigned To field:
  - v. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)

    OR

Figure 6.39: Assigned To Field Auto Complete Dropdown

  - vi. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



CLARITAS CRM Customer Relationship Management System

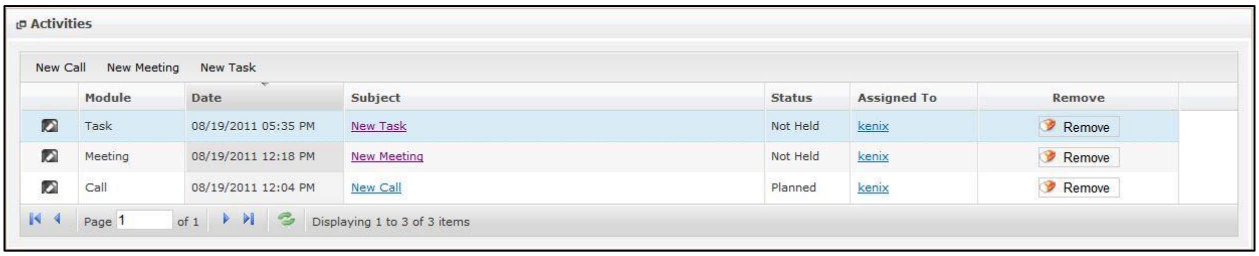
User List

User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 6.40: Assigned To Popup

- After a New Task is created, the subpanel will auto-refresh and display the newly-created Task.



Activities

New Call New Meeting New Task

Module	Date	Subject	Status	Assigned To	Remove
Task	08/19/2011 05:35 PM	New Task	Not Held	kenix	Remove
Meeting	08/19/2011 12:18 PM	New Meeting	Not Held	kenix	Remove
Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Page 1 of 1 Displaying 1 to 3 of 3 items

Figure 6.41: Activities Subpanel List New Task

To **cancel creating New Task**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Task and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Task.

Opportunity – History Subpanel

This subpanel contains any history or note related to the Opportunity.

Opportunity – History Subpanel (New Note)

To create a New Note related to an Opportunity, click at the New Note menu at **History** subpanel. Once New Note menu is clicked, a Note Management window will pop up for user to create a New Note.

Enter the details of the Note and click Save button to create the New Note.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

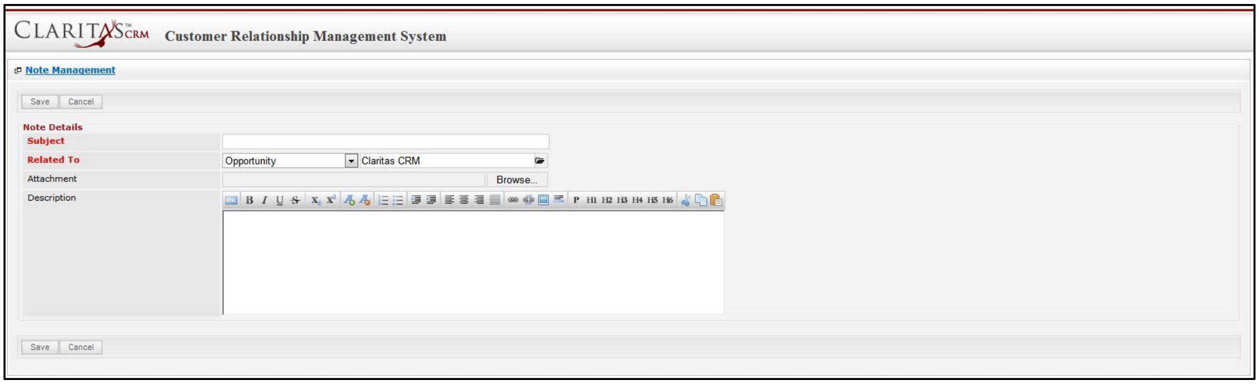
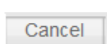
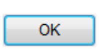


Figure 6.42: New Note Management Popup

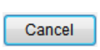
- Compulsory fields: **Subject**, and **Related To**.
- **Related To** field will auto populate the name of the related **Opportunity**.
- **Attachment** field allow file extensions are as below (format that is not stated are not allowed to be uploaded):
    - **Documents:** .doc, .docx, .xls, .xlsx, . rtf, .txt, .pdf, .ppt, .pptx
    - **Pictures:** .jpg, .bmp, .png, .bmp, .gif
    - **Audio:** .mp3, .wma
    - **Video: .**3gp, .mp4, .rmvb, .avi, .flv
    - **Archive:** .zip, .rar
- After a New Note is created, the subpanel will auto-refresh and display the newly-created Note.

Figure 6.43: History Subpanel List New Note

To **cancel creating New Note**, click 

button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Note and close the window. Click 

button to **confirm**.

Clicking 

button will **cancel** closing the window and user can proceed with creating the New Note.

Opportunity – Quotes Subpanel

This subpanel contains any Quote related to the **Opportunity**.

Create New Quote

To create a New Quote related to a Opportunity, click at the Create New menu at **Quotes** subpanel. Once Create New menu is clicked, a Quote Management window will pop up for user to create a New Quote. Enter the details of the Quote and click Save button to create the New Quote.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

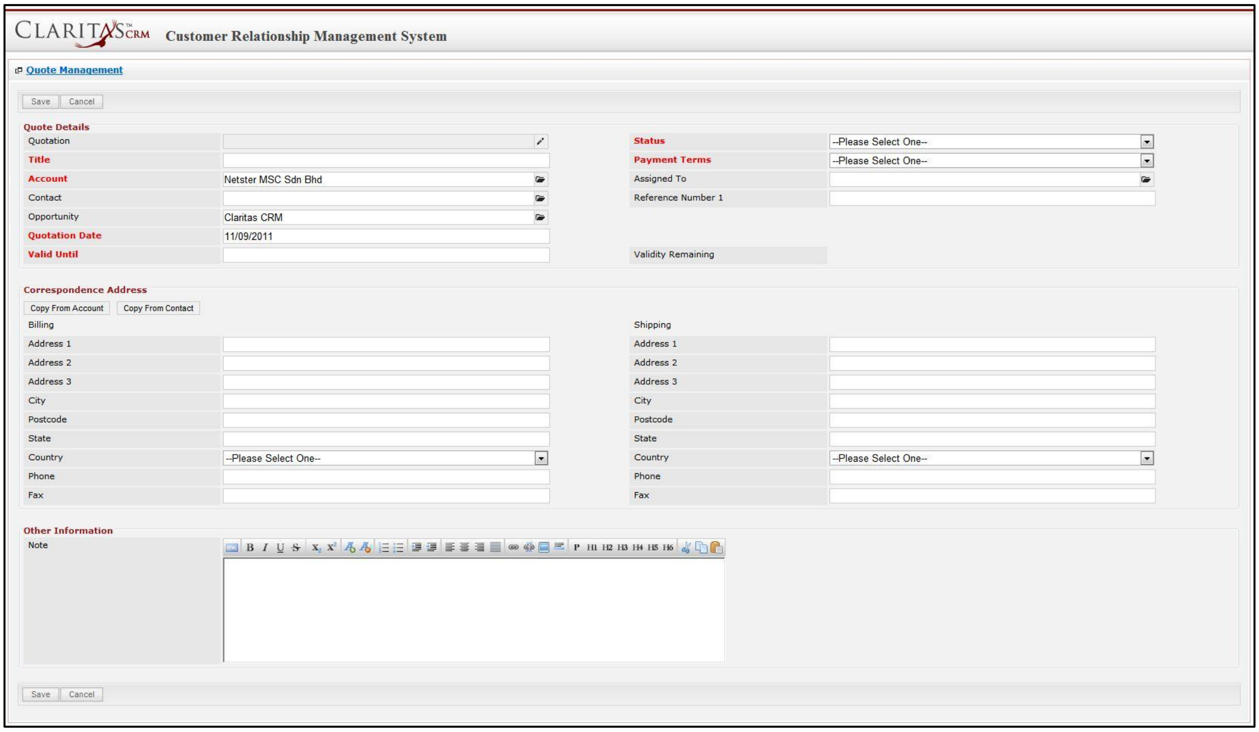


Figure 6.44: New Quote Management Popup

- Compulsory fields: **Title**, **Account**, **Quotation Date**, **Valid Until**, **Status** and **Payment Terms**.
- **Title** field is the title of the Quote;
- **Account** field will auto populate the name of the related **Account** (if available).
- **Opportunity** field will auto populate the name of the related **Opportunity** (if available).
- **Quotation Date** field when clicked will populate a calendar for user to select the date for the Quote. Click at the **Month** and **Year** dropdown to navigate to the selected date.

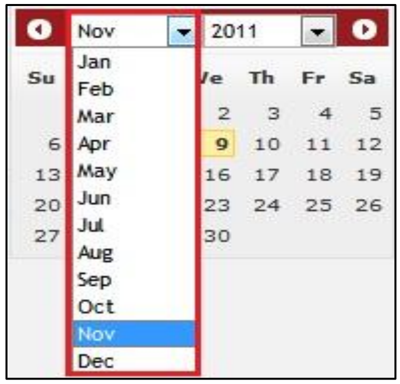


Figure 6.45: Quotation Date

- **Valid Until** field when clicked will populate a calendar for user to select the date where this Quote is Valid Until. Click at the **Month** and **Year** dropdown to navigate to the selected date.

Figure 6.46: Valid Until

- **Status** field is the status of the Quote; the options for Status are: **Draft**, **Negotiation**, **Delivered**, **On Hold**, **Closed Won** and **Closed Lost**.
- **Payment Terms** field is the term for the payment; the options for Payment Terms are: **Cash on Delivery**, **Net 7 Days**, **Net 14 Days**, **Net 30 Days** and **Net 60 Days**.
- In **Correspondence Address** section, user can choose to copy the address from the related Account by clicking the Copy From Account button or copy the address from the related Contact by clicking the Copy From Contact button. Otherwise, user can also choose to manually enter the Billing and Shipping address.
- After a New Quote is created, the subpanel will auto-refresh and display the newly-created Quote.


Quotes

Create New   Select

Date	Quotation	Title	Amount	Valid Until	Validity Remaining	Status	Assigned To	Remove
11/09/2011	QT20111109-08	Claritas CRM Quotation	0.00	11/10/2011	0 Day(s)	Draft	Kenix Yip	Remove

Page 1 of 1   Displaying 1 to 1 of 1 items

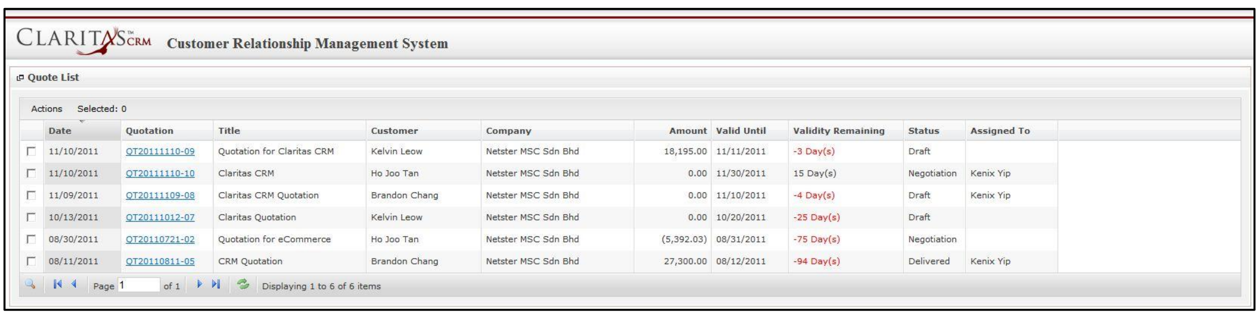
Figure 6.47: Quotes Subpanel List New Quote

To **cancel creating New Quote**, click Cancel button. A confirmation dialog showing “Are you sure you want to close this window?” will prompt user to cancel creating New Quote and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Quote.

Select Quote

To select a **Quote** to this **Opportunity**, click at the Select menu. Once Select menu is clicked, a **Quote List** window will pop up for user to select a **Quote**. Click at the **Quote** hyperlink in **Quote column** to select the **Quote** that associate with this **Opportunity**.


CLARITAS CRM Customer Relationship Management System

Quote List

Actions   Selected: 0

Date	Quotation	Title	Customer	Company	Amount	Valid Until	Validity Remaining	Status	Assigned To
11/10/2011	QT20111110-09	Quotation for Claritas CRM	Kelvin Leow	Netster MSC Sdn Bhd	18,195.00	11/11/2011	-3 Day(s)	Draft	
11/10/2011	QT20111110-10	Claritas CRM	Ho Joo Tan	Netster MSC Sdn Bhd	0.00	11/30/2011	15 Day(s)	Negotiation	Kenix Yip
11/09/2011	QT20111109-08	Claritas CRM Quotation	Brandon Chang	Netster MSC Sdn Bhd	0.00	11/10/2011	-4 Day(s)	Draft	Kenix Yip
10/13/2011	QT20111012-07	Claritas Quotation	Kelvin Leow	Netster MSC Sdn Bhd	0.00	10/20/2011	-25 Day(s)	Draft	
08/30/2011	QT20110721-02	Quotation for eCommerce	Ho Joo Tan	Netster MSC Sdn Bhd	(5,392.03)	08/31/2011	-75 Day(s)	Negotiation	
08/11/2011	QT20110811-05	CRM Quotation	Brandon Chang	Netster MSC Sdn Bhd	27,300.00	08/12/2011	-94 Day(s)	Delivered	Kenix Yip

Page 1 of 1   Displaying 1 to 6 of 6 items

Figure 6.48: Select Quote Popup

Opportunity – Contracts Subpanel

This subpanel contains any Contract related to the **Opportunity**.

Create New Contract

To create a New Contract related to an Opportunity, click at the Create New menu at **Contracts** subpanel. Once Create New menu is clicked, a Contract Management window will pop up for user to create a New Contract. Enter the details of the Contract and click Save button to create the New Contract.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

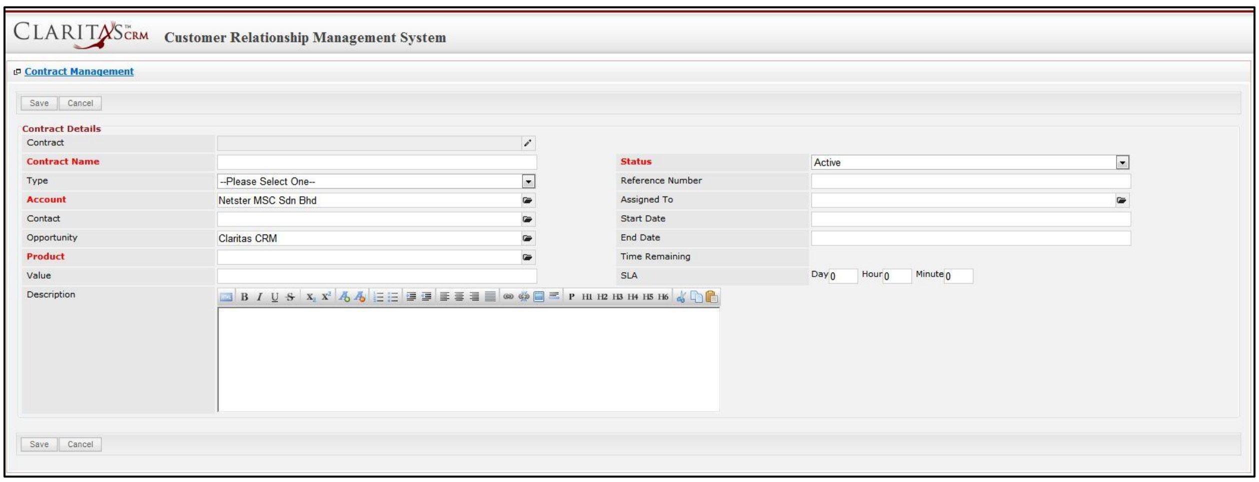


Figure 6.49: New Contract Management Popup

- Compulsory fields: **Contract Name**, **Account**, **Product** and **Status**.
- **Contract Name** field is the name of the Contract;
- **Account** field will auto populate the name of the related **Account** (if available).
- **Opportunity** field will auto populate the name of the related **Opportunity** (if available).
- **Contact, Opportunity** and **Product** field are to select or enter the related Contact, Opportunity and Product to the Contract. These fields will only be enabled once the **Account** field is filled in. There are two ways of entering the **Product** field:

    v. Type in the Product Name and wait for the **auto-complete** dropdown of the Product; if the name entered does not match any of the available products; the textbox will be auto-cleared. (Click at the Product name to select the product) **OR**

Figure 6.50: Product Field Auto Complete Dropdown

vi. Click at the button to open a new popup containing the list of all Products. (Click at the Product Name hyperlink to select the product)

Figure 6.51: Product Listing Popup

- **Status** field is the status of the Contract; the options for Status are: **Active** and **Inactive**.

To **cancel creating New Contract**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Contract and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Contract.

Select Contract

To select a **Contract** to this **Opportunity**, click at the Select menu. Once Select menu is clicked, a **Contract List** window will pop up for user to select a **Contract**. Click at the **Contract Name** hyperlink in **Contract Name** column to select the **Contract** that associate with this **Opportunity**.

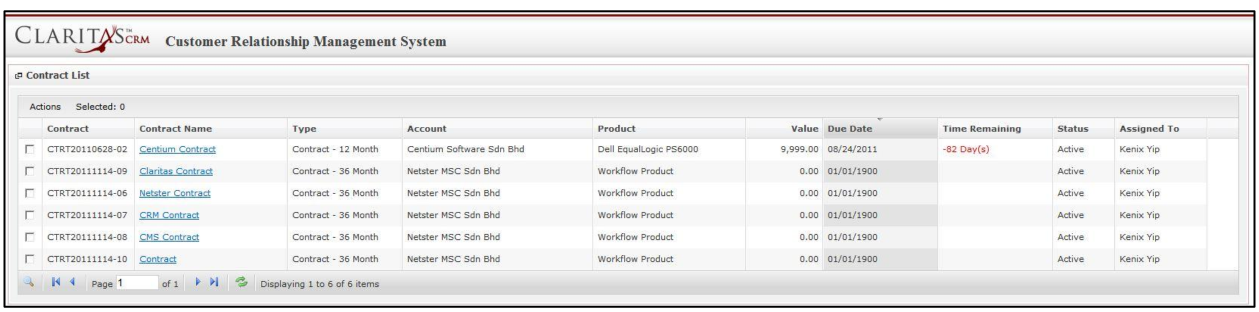


Figure 6.52: Select Contract Popup

7 Sales & Marketing – Quotes

This module is to **create and store Quote details**.

Quote Listing

To view Quote Listing, click at the **Sales & Marketing > Quote** menu at the Main Menu bar.

Figure 7.1: Quote Menu in Main Menu

Page will load the list of the Quotes available in the system.

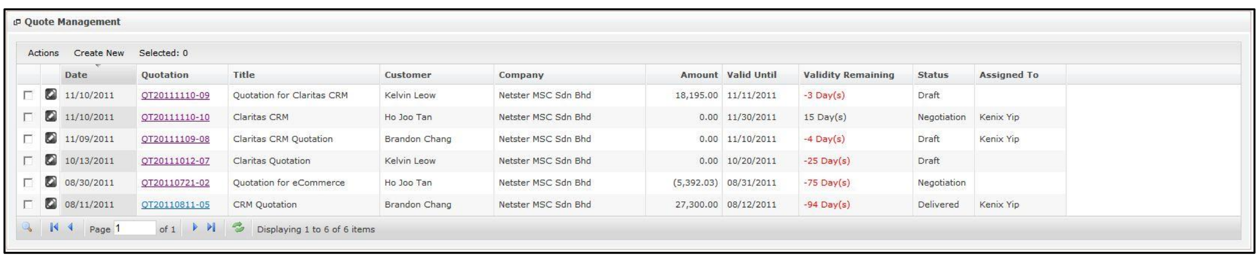


Figure 7.2: Quote Listing

To view the Quote Details, click at the Quotation hyperlink in Quotation column.

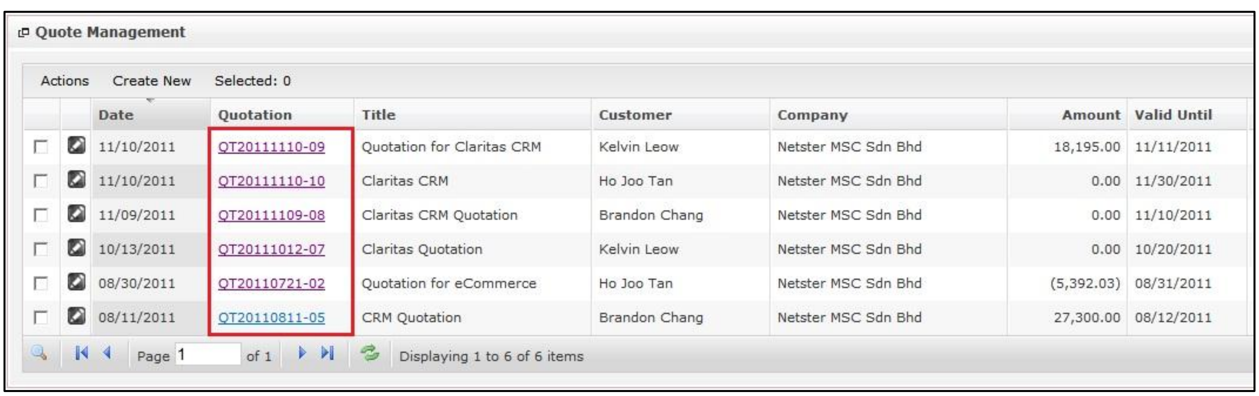


Figure 7.3: Quotation Hyperlink

After clicking the Quotation hyperlink, page will navigate to the **Quote Management Detail** page which displays all the details of the Quote.

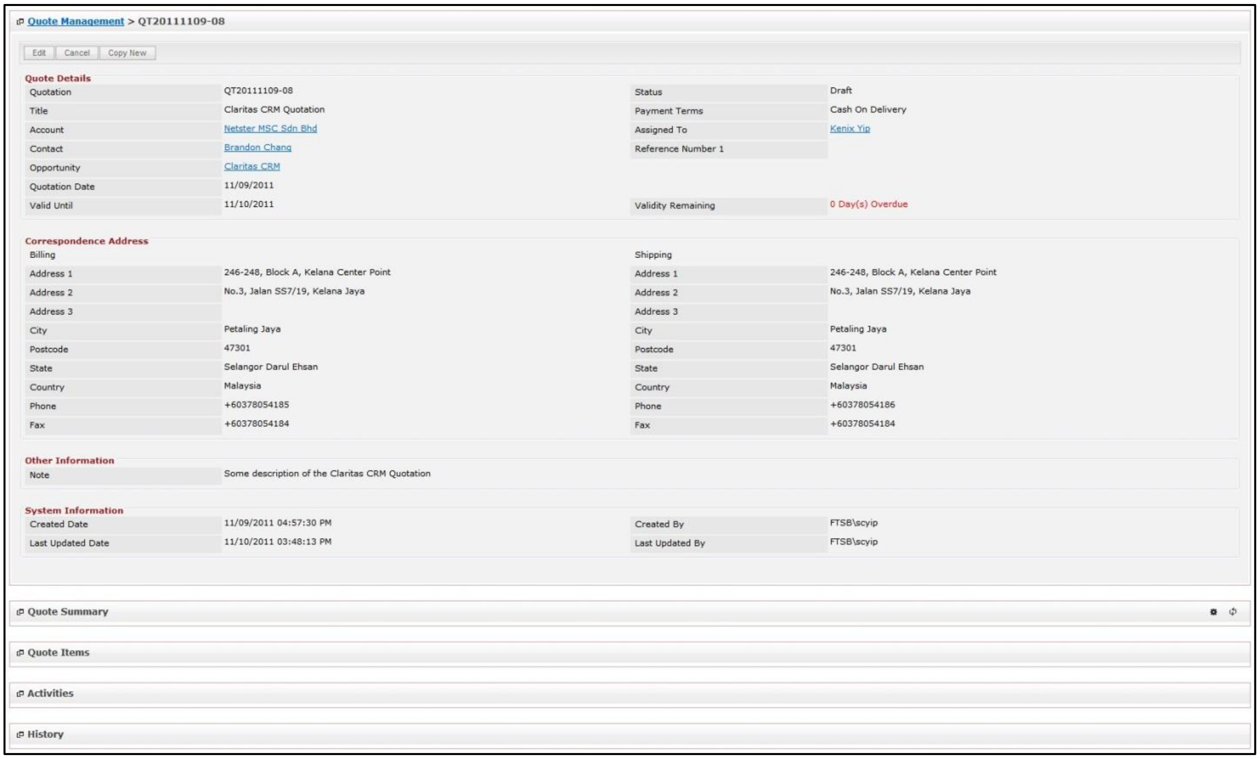


Figure 7.4: Quote Management Detail Page

To copy the entire record and save as a new record, click Copy New button at **Quote Maintenance Detail** page.

To create a new Quote, click at Create New menu at the top of the Quote Listing.

Figure 7.5: Create New Quote Menu

After clicking Create New menu, page will navigate to **Quote Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Quote Management Detail** page or click Cancel button to cancel creating and navigates back to the **Quote Listing** page.

***Related Topics**: See "Create New Quote"*

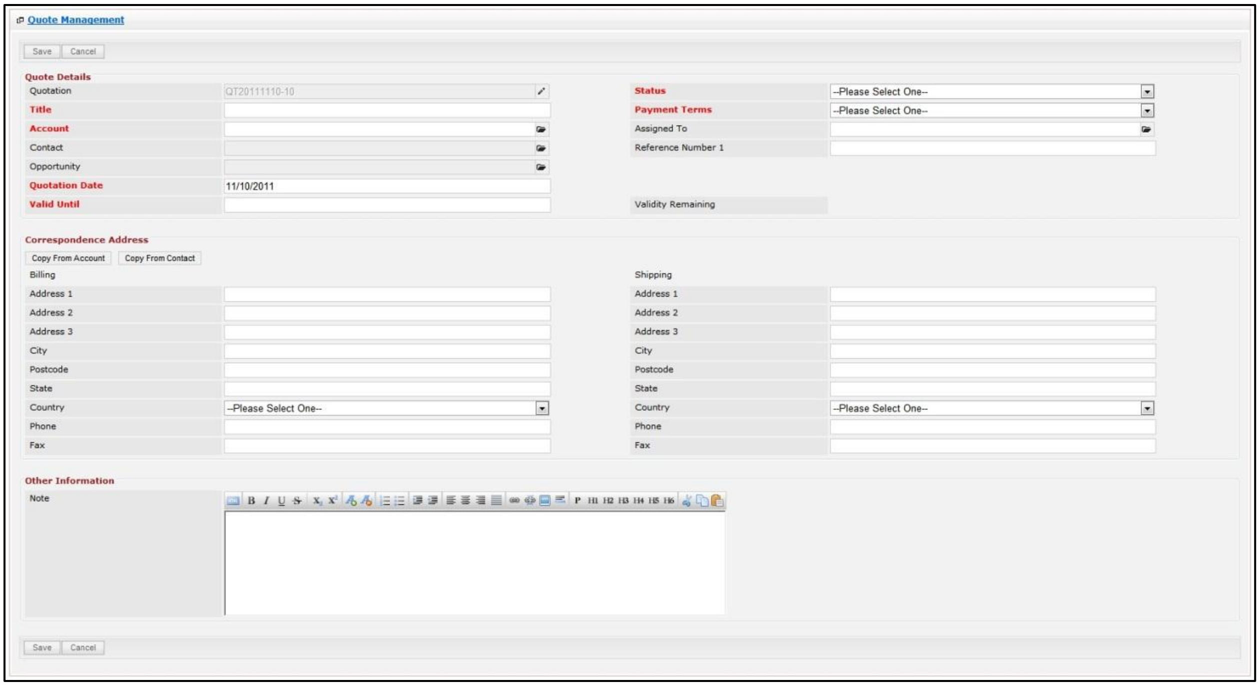


Figure 7.6: Quote Management Create New Page

To **delete** a quote, select the record and click **Actions > Delete**.

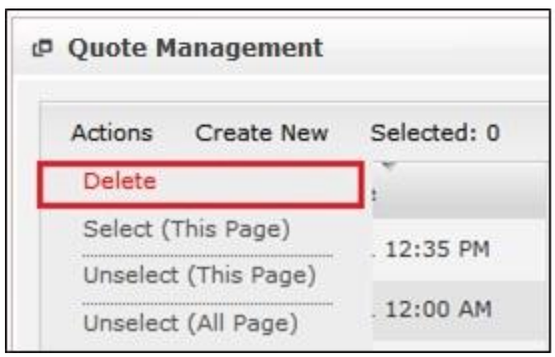


Figure 7.7: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 7.8: Message Showing Quote Deleted Successfully

Deleted quote will **no longer** be displayed in Quote Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

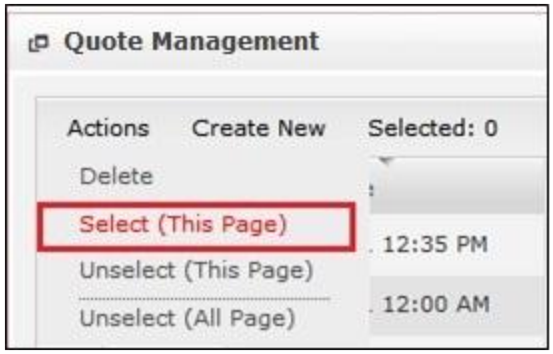


Figure 7.9: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

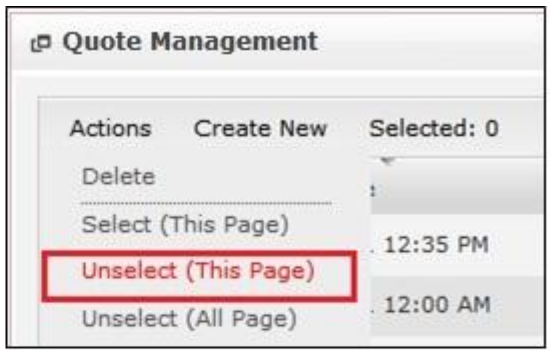


Figure 7.10: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

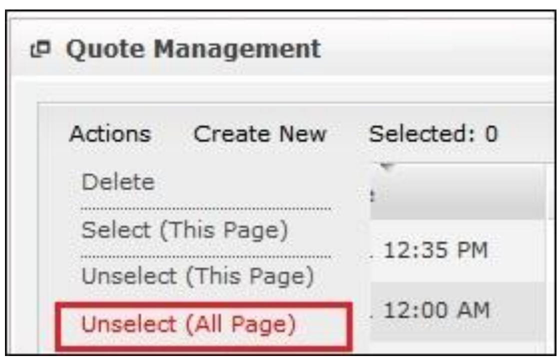


Figure 7.11: Actions > Unselect (All Pages) Menu

To go to the First Page of the listing, click at the **First Page**  button.

To go to the Previous Page of the listing, click at the **Previous Page**  button.

To go to the Next Page of the listing, click at the **Next Page**  button.

To go to the Last Page of the listing, click at the **Last Page**  button.

To refresh the listing page, click at the **Refresh**  button.

To search for record/s, click at the **Search** button. An **Advance Search** section will expand at the bottom of the listing for user to select the search field and enter search value.

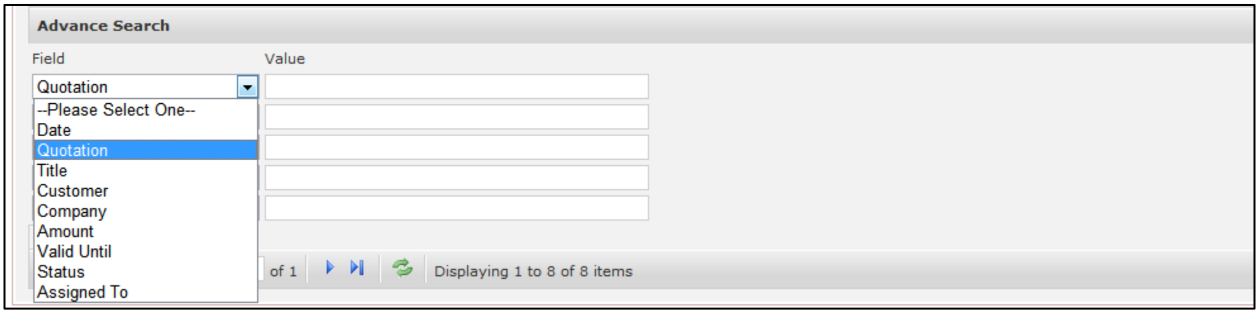


Figure 7.12: Quote Advance Search

To edit the details of the Quote, click at the **Edit** button or click the Edit button in **Quote Management Detail** page. After clicking at the **Edit** button page will navigate to the **Quote Management Edit** page.

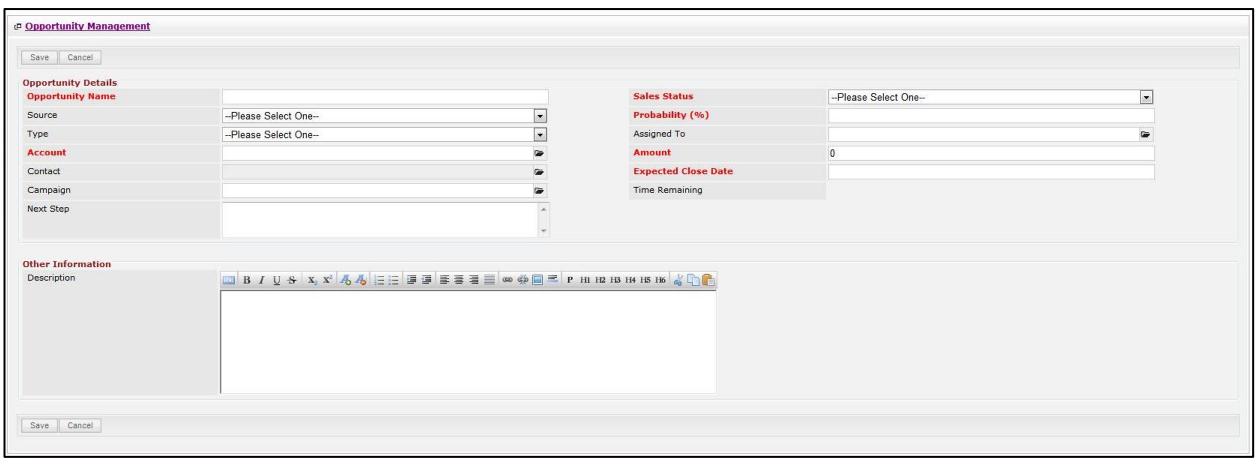


Figure 7.13: Quote Management Edit Page

Edit the relevant details and click Save button to save the changes and navigates back to **Quote Management Detail** page. Or click Cancel button to cancel editing and navigates back to the **Quote Management Detail** page.

***Related Topics**: See "Edit Quote "*

Create New Quote

To create new Quote, click at the **Sales & Marketing > Quote** menu at the Main Menu bar. Then click the Create New menu at the top of the **Quote Listing**. After clicking Create New menu, page will navigate to **Quote Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Quote Management Detail** page.

There are **three** sections to be filled in to create a new Quote: **Quote Details**, **Correspondence Address** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Quote Details**

- Compulsory fields: **Title**, **Account**, **Quotation Date**, **Valid Until**, **Status** and **Payment Terms**.

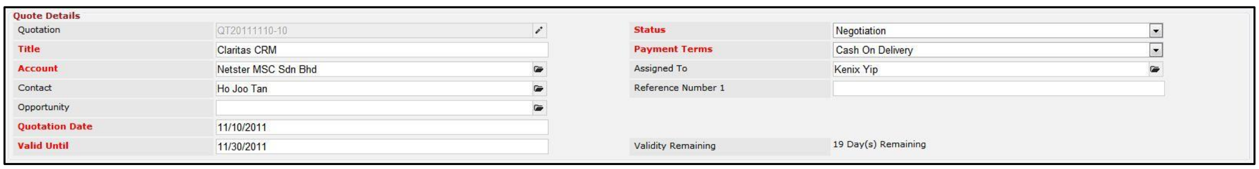


Figure 7.14: Create Quote - Quote Details

- **Quotation** field is an auto-generated running number and cannot be edited.
- **Title** field will be the Title of the Quote for identification.
- **Account** field is to associate the Quote to the related Account. There are two ways of entering the **Account** field:
  i. Type in the Company Name and wait for the **auto-complete** dropdown of the Account, if the name entered does not match any of the available accounts; the textbox will be auto-cleared. (Click at the Company Name to select the account) **OR**

Figure 7.15: Account Field Auto Complete Dropdown

  ii. Click at the button to open a new popup containing the list of all Accounts. (Click at the Company Name hyperlink to select the account)

Figure 7.16: Account Popup

- **Quotation Date** field when clicked will populate a calendar for user to select the date for the Quote. Click at the **Month** and **Year** dropdown to navigate to the selected date.

Figure 7.17: Quotation Date

- **Valid Until** field when clicked will populate a calendar for user to select the date where this Quote is Valid Until. Click at the **Month** and **Year** dropdown to navigate to the selected date.

Figure 7.18: Valid Until

- **Status** field is the status of the Quote; the options for Status are: **Draft**, **Negotiation**, **Delivered**, **On Hold**, **Closed Won** and **Closed Lost**.
- **Payment Terms** field is the term for the payment; the options for Payment Terms are: **Cash on Delivery**, **Net 7 Days**, **Net 14 Days**, **Net 30 Days** and **Net 60 Days**.

- **Validity Remaining** field will auto-populate the validity remaining once the **Valid Until** field is entered/selected.

2) **Correspondence Address**

- User can choose to copy the address from the related Account by clicking the Copy From Account button or copy the address from the related Contact by clicking the Copy From Contact button. Otherwise, user can also choose to manually enter the Billing and Shipping address.

Figure 7.19: Create Quote - Correspondence Address

3) **Other Information**

- For user to enter some description or additional information regarding the Quote. (Optional)

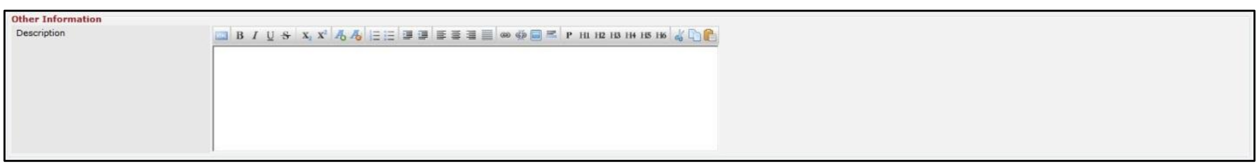


Figure 7.20: Create Quote - Other Information

To **cancel creating New Quote**, click Cancel button. Page will navigate back to **Quote Listing** page.

Edit Quote

To edit Quote details, click at the **Sales & Marketing > Quote** menu at the Main Menu bar. Click at the **Edit** button in **Quote Listing** page or click at the Name hyperlink in **Quote Listing** page then click the Edit button in **Quote Management Detail** page. After clicking the **Edit** button or Edit button, page will navigate to **Quote Management Edit** page. Edit the relevant details and click Save button to save the changes and navigates back to **Quote Management Detail** page or click

Save and Next button to save the changes and navigates to the **Quote Management Edit page** for the next record.

There are **three** sections to be filled in to be edited: **Quote Details** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Quote Details**

- Compulsory fields: **Title**, **Account**, **Quotation Date**, **Valid Until**, **Status** and **Payment Terms**.

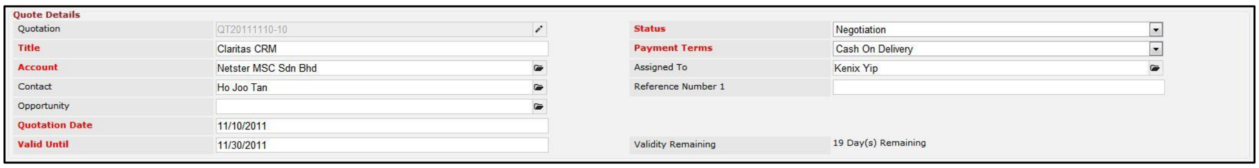


Figure 7.21: Edit Quote - Quote Details

- **Quotation** field is an auto-generated running number and cannot be edited.
- **Title** field will be the Title of the Quote for identification.
- **Account** field is to associate the Quote to the related Account. There are two ways of entering the **Account** field:

  i. Type in the Company Name and wait for the **auto-complete** dropdown of the Account, if the name entered does not match any of the available accounts; the textbox will be auto-cleared. (Click at the Company Name to select the account) **OR**

Figure 7.22: Account Field Auto Complete Dropdown

  ii. Click at the button to open a new popup containing the list of all Accounts. (Click at the Company Name hyperlink to select the account)

Figure 7.23: Account Popup

- **Quotation Date** field when clicked will populate a calendar for user to select the date for the Quote. Click at the **Month** and **Year** dropdown to navigate to the selected date.

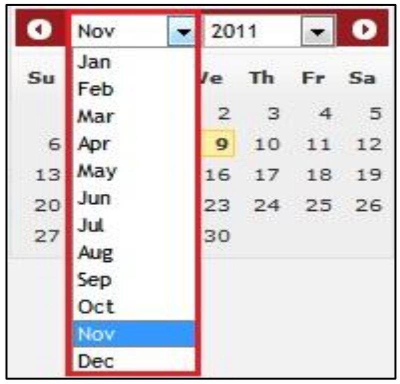


Figure 7.24: Quotation Date

- **Valid Until** field when clicked will populate a calendar for user to select the date where this Quote is Valid Until. Click at the **Month** and **Year** dropdown to navigate to the selected date.

Figure 7.25: Valid Until

- **Status** field is the status of the Quote; the options for Status are: **Draft**, **Negotiation**, **Delivered**, **On Hold**, **Closed Won** and **Closed Lost**.
- **Payment Terms** field is the term for the payment; the options for Payment Terms are: **Cash on Delivery**, **Net 7 Days**, **Net 14 Days**, **Net 30 Days** and **Net 60 Days**.
- **Validity Remaining** field will auto-populate the validity remaining once the **Valid Until** field is entered/selected.

2) **Correspondence Address**

- User can choose to copy the address from the related Account by clicking the Copy From Account button or copy the address from the related Contact by clicking the Copy From Contact button. Otherwise, user can also choose to manually enter the Billing and Shipping address.

Figure 7.26: Edit Quote - Correspondence Address

3) **Other Information**

- For user to enter some description or additional information regarding the Quote. (Optional)

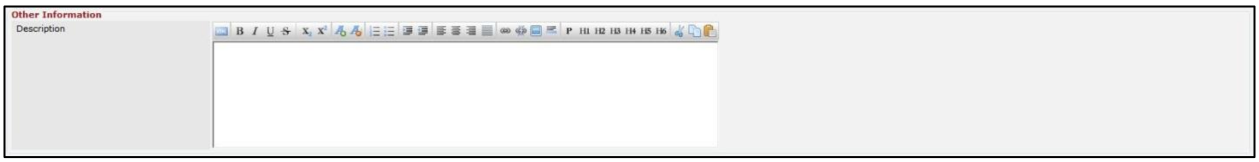


Figure 7.27: Edit Quote - Quote Other Information

To **cancel editing New Quote**, click Cancel button at **Quote Management Detail** page. Page will navigate back to **Quote Listing** page.

Quote – Quote Summary Subpanel

This subpanel displays the **Quote Price**, **Quote Discount**, **Quote Tax** and **Quote Total** based on the details entered in **Quote Items** subpanel.

Figure 7.28: Quote Summary

Quote Price and **Quote Total** fields are auto-calculated based on the **Quote Items**; **Quote Discount** is the discount user would like to give to the quote whereas **Quote Tax** is the tax implemented on the Quote total. These two fields (Quote Discount and Quote Tax) are editable.

To edit the Quote Discount and Quote Tax fields, click at the 0.00 (default value) of the fields and enter the amount. Then, click the Save button to save the data.

Figure 7.29: Edit Quote Discount

Quote – Quote Items

This subpanel contains any items related to the Quote. **Quote Items** created will be displayed in this **Quote Items** subpanel.

To create a New Quote Item related to a Quote, click at the Create New menu at **Quote Items** subpanel. Once Create New menu is clicked, a Quote Item Management window will pop up for user to create a New Quote Item. Enter the details of the Quote Item and click Save button to create the New Quote Item.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

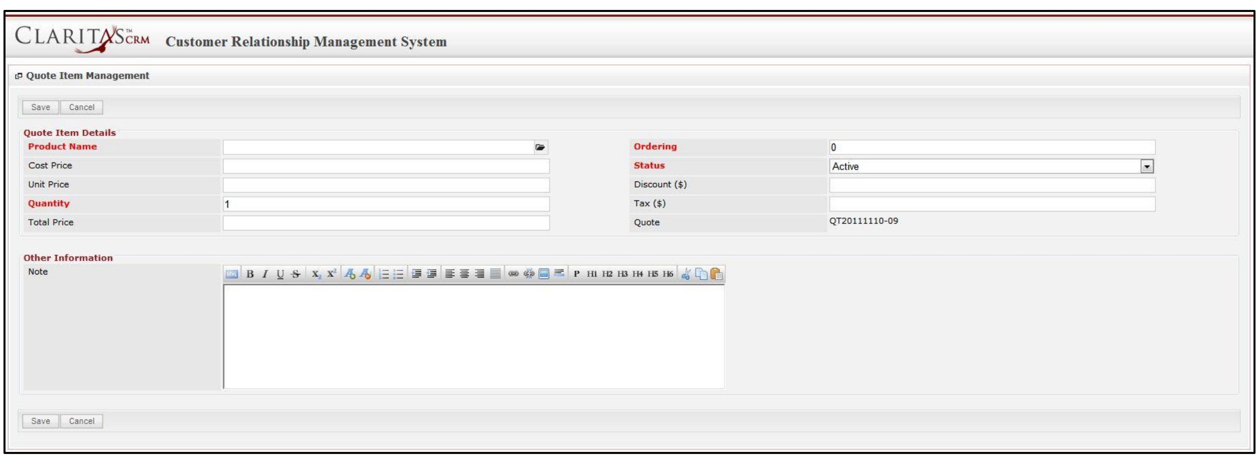


Figure 7.30: New Quote Item Management Popup

- Compulsory fields: **Product Name**, **Quantity**, **Ordering** and **Status**.
- **Product Name** field is to select or enter the related Product to the Quote. There are two ways of entering the **Product Name** field:

i. Type in the Product Name and wait for the **auto-complete** dropdown of the Product; if the name entered does not match any of the available products; the textbox will be auto-cleared. (Click at the Product name to select the product) **OR**

Figure 7.31: Product Name Field Auto Complete Dropdown

ii. Click at the button to open a new popup containing the list of all Products. (Click at the Product Name hyperlink to select the product)

Figure 7.32: Product Listing Popup

- **Cost Price** field is the cost price of the product.
- **Unit Price** field is the selling price per unit of the product.
- **Quantity** field is the quantity of the product that the Quote Item is having.
- **Ordering** field is the number of order this Quote Item is having.
- **Status** field is the status of the Quote Item; the options for Status are: **Active** or **Inactive**.
- In **Other Information** section, user can enter some related information or details of the quote item.
- After a New Quote Item is created, the subpanel will auto-refresh and display the newly-created Quote Item.

Figure 7.33: Activities Subpanel List New Call

To **cancel creating New Quote Item**, click Cancel button. A confirmation dialog showing “Are you sure you want to close this window?” will prompt user to cancel creating New Call and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Quote Item.

Quote – Activities Subpanel

This subpanel contains any activities related to the Quote. **Call**, **Meeting** and **Task** created will be displayed in this **Activities** subpanel.

Quote – Activities Subpanel (New Call)

To create a New Call related to a Quote, click at the New Call menu at **Activities** subpanel. Once New Call menu is clicked, a Call Management window will pop up for user to create a New Call. Enter the details of the Call and click Save button to create the New Call. Or click Cancel menu to cancel creating New Call.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

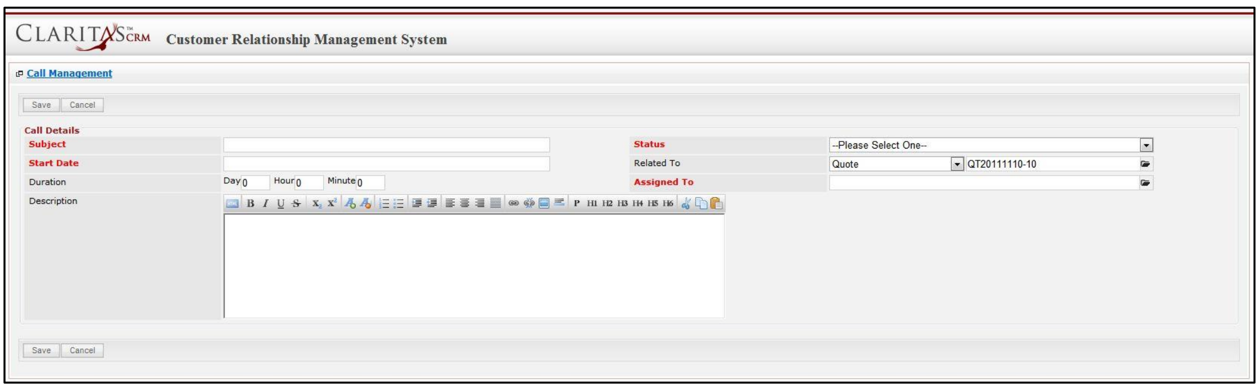


Figure 7.34: New Call Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Quote**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Call. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Call is created. Click at the Done menu to set the date and time.

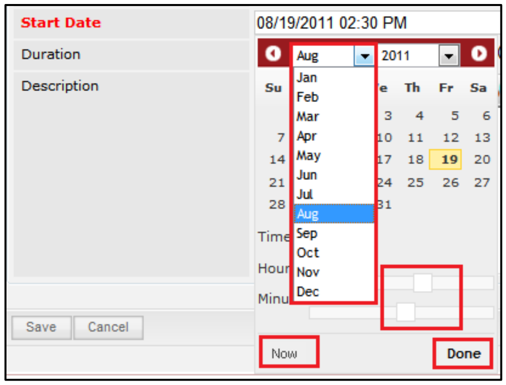


Figure 7.35: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Call for the related Quote. There are two ways of entering the Assigned To field:

  i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 7.36: Assigned To Field Auto Complete Dropdown

  ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

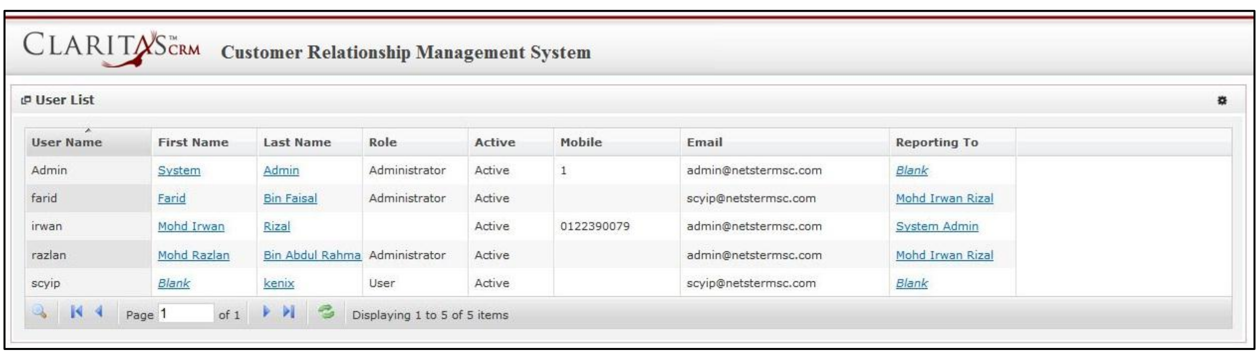


Figure 7.37: Assigned To Popup

- After a New Call is created, the subpanel will auto-refresh and display the newly-created Call.

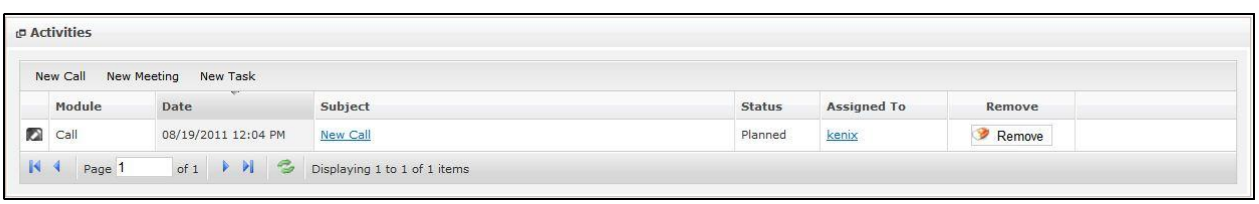


Figure 7.38: Activities Subpanel List New Call

To **cancel creating New Call**, click Cancel button. A confirmation dialog showing “Are you sure you want to close this window?” will prompt user to cancel creating New Call and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Call.

Quote – Activities Subpanel (New Meeting)

To create a New Meeting related to a Quote, click at the New Meeting menu at **Activities** subpanel. Once New Meeting menu is clicked, a Meeting Management window will pop up for user to create a New Meeting. Enter the details of the Meeting and click Save button to create the New Meeting. Or click Cancel menu to cancel creating New Meeting.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

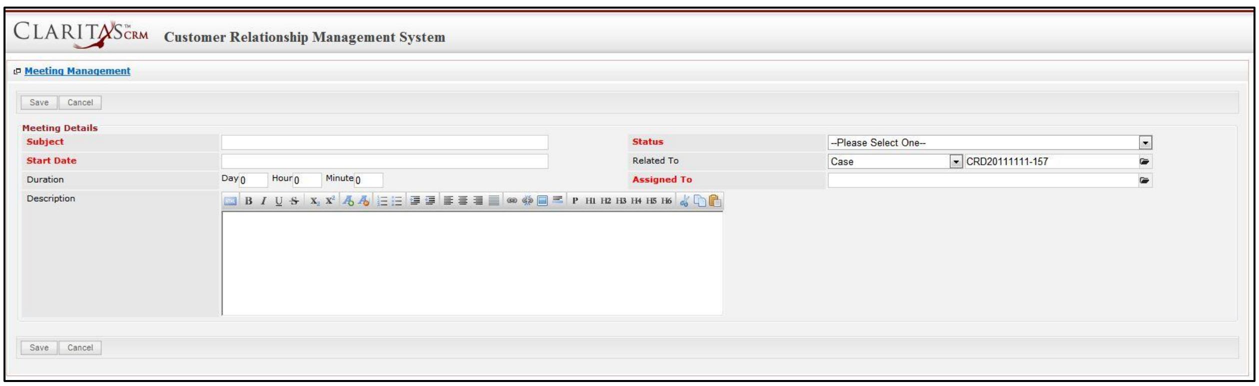


Figure 7.39: New Meeting Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Quote**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Meeting. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Meeting is created. Click at the Done menu to set the date and time.

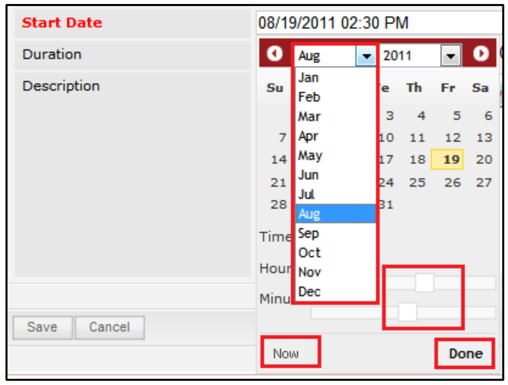
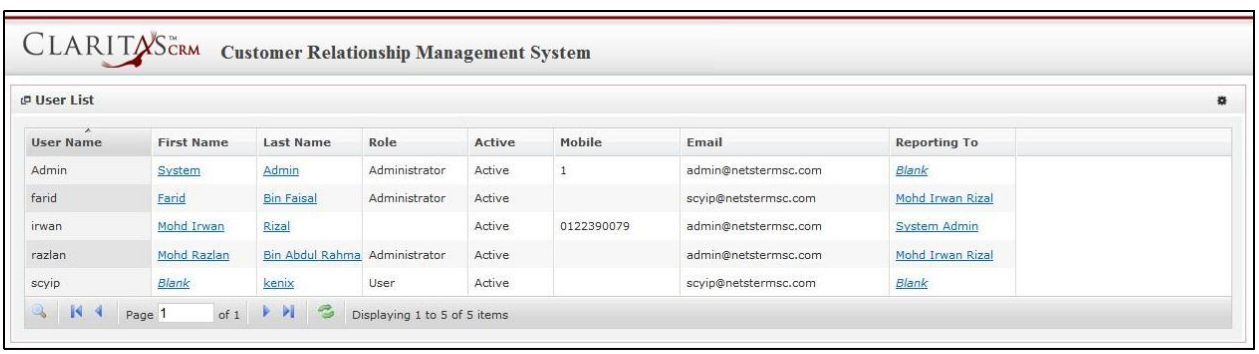


Figure 7.40: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Meeting for the related Quote. There are two ways of entering the **Assigned To** field:
  i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 7.41: Assigned To Field Auto Complete Dropdown

  ii. Click at the  button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Figure 7.42: Assigned To Popup

- After a New Meeting is created, the subpanel will auto-refresh and display the newly-created Meeting.

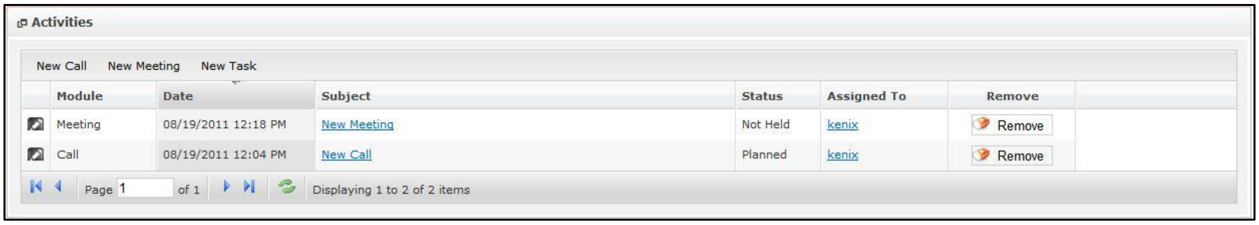


Figure 7.43: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Meeting and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Meeting.

Quote – Activities Subpanel (New Task)

To create a New Task related to a Quote, click at the New Task menu at **Activities** subpanel. Once New Task menu is clicked, a Task Management window will pop up for user to create a New Task. Enter the details of the Task and click Save button to create the New Task. Or click Cancel menu to cancel creating New Task.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

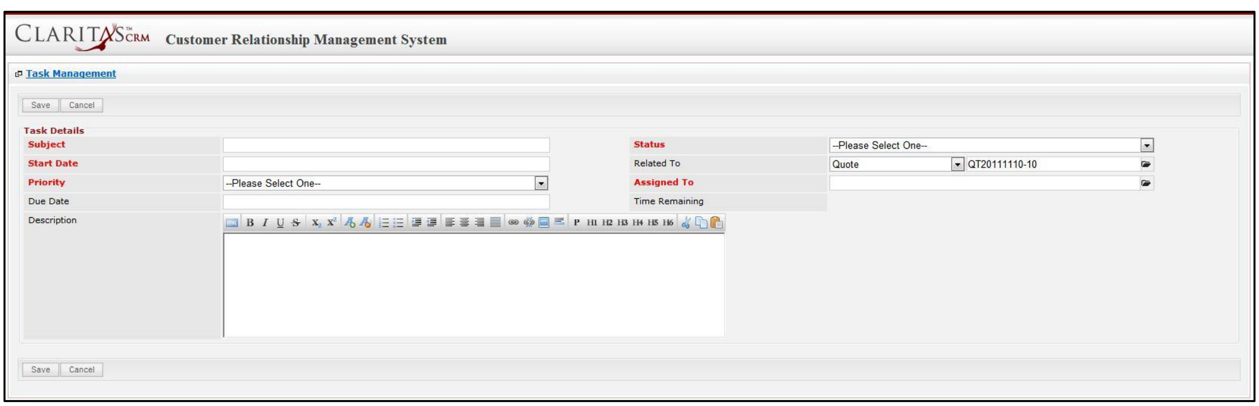


Figure 7.44: New Task Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Priority**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Quote**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Task. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time

bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Task is created. Click at the Done menu to set the date and time.

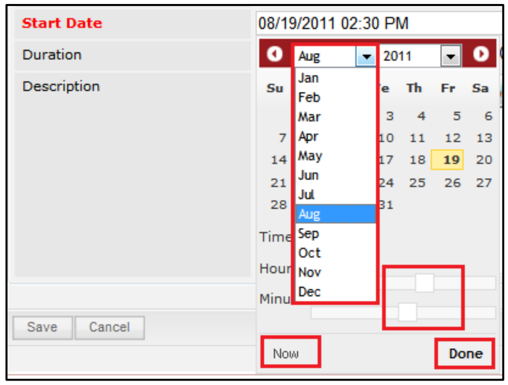
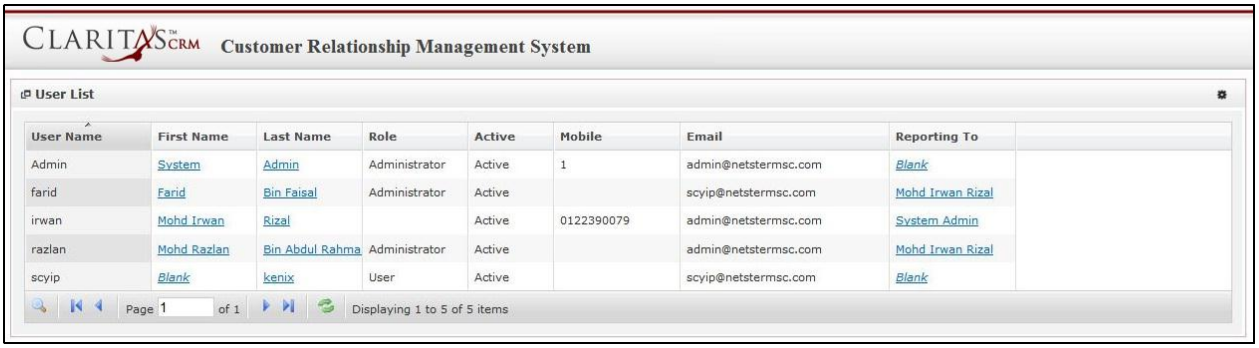


Figure 7.45: Start Date Time

- **Priority** field once selected will auto-populate the **Due Date** field and **Time Remaining** accordingly.
- There are five **Statuses** available for Task- **Not Started**, **In Progress**, **Completed**, **Pending Input**, and **Deferred.**
- **Assigned To** field is to assign a User to in charge of the Task for the related Quote. There are two ways of entering the Assigned To field:
    - i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 7.46: Assigned To Field Auto Complete Dropdown

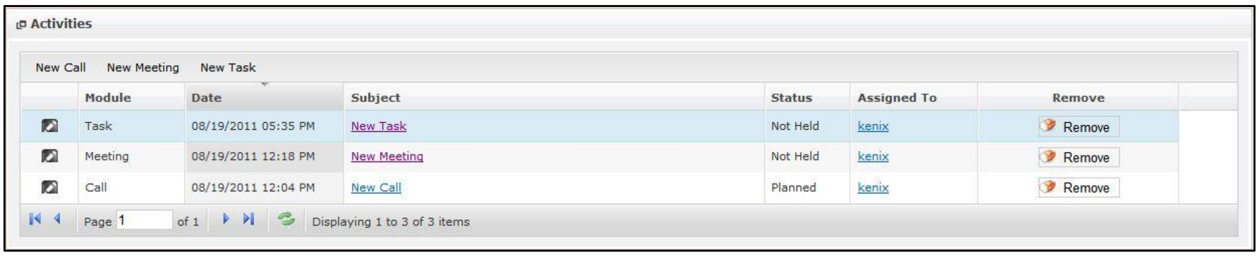
    - ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Figure 7.47: Assigned To Popup

- After a New Task is created, the subpanel will auto-refresh and display the newly-created Task.



	Module	Date	Subject	Status	Assigned To	Remove
	Task	08/19/2011 05:35 PM	New Task	Not Held	kenix	Remove
	Meeting	08/19/2011 12:18 PM	New Meeting	Not Held	kenix	Remove
	Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Figure 7.48: Activities Subpanel List New Task

To **cancel creating New Task**, click Cancel button. A confirmation dialog showing “Are you sure you want to close this window?” will prompt user to cancel creating New Task and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Task.

Quote – History Subpanel

This subpanel contains any history or note related to the Quote.

Quote – History Subpanel (New Note)

To create a New Note related to a Quote, click at the New Note menu at **History** subpanel. Once New Note menu is clicked, a Note Management window will pop up for user to create a New Note.

Enter the details of the Note and click Save button to create the New Note.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

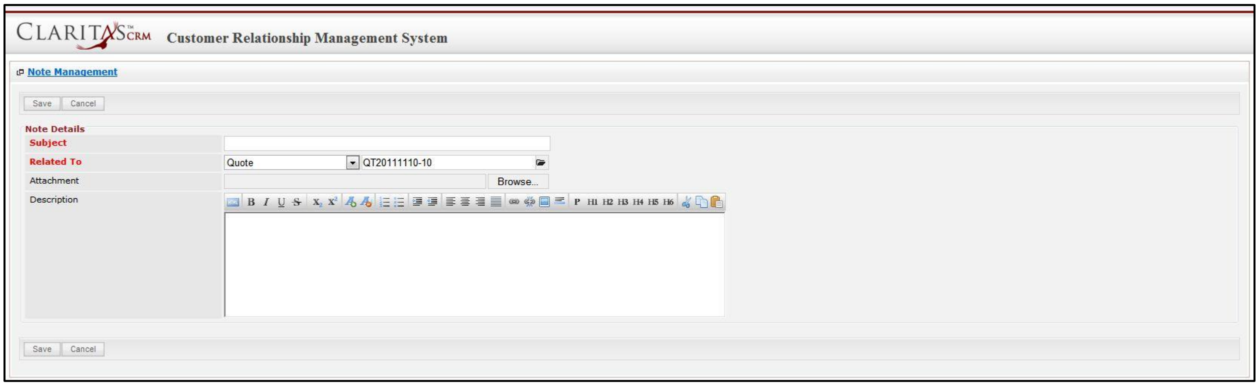
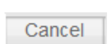
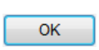
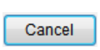


Figure 7.49: New Note Management Popup

- Compulsory fields: **Subject**, and **Related To**.
- **Related To** field will auto populate the name of the related **Quote**.
- **Attachment** field allow file extensions are as below (format that is not stated are not allowed to be uploaded):
  - **Documents:** .doc, .docx, .xls, .xlsx, . rtf, .txt, .pdf, .ppt, .pptx
  - **Pictures:** .jpg, .bmp, .png, .bmp, .gif
  - **Audio:** .mp3, .wma
  - **Video: .**3gp, .mp4, .rmvb, .avi, .flv
  - **Archive:** .zip, .rar
- After a New Note is created, the subpanel will auto-refresh and display the newly-created Note.

Figure 7.50: History Subpanel List New Note

To **cancel creating New Note**, click  button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Note and close the window. Click  button to **confirm**.

Clicking  button will **cancel** closing the window and user can proceed with creating the New Note.

8 Support – Case

This module is to **create and store Case details**.

Case Listing

To view Case Listing, click at the **Support > Case** menu at the Main Menu bar.

Figure 8.1: Case Menu in Main Menu

Page will load the list of the Case available in the system.

Figure 8.2: Case Listing

To view the Case Details, click at the Case ID hyperlink in Case column.

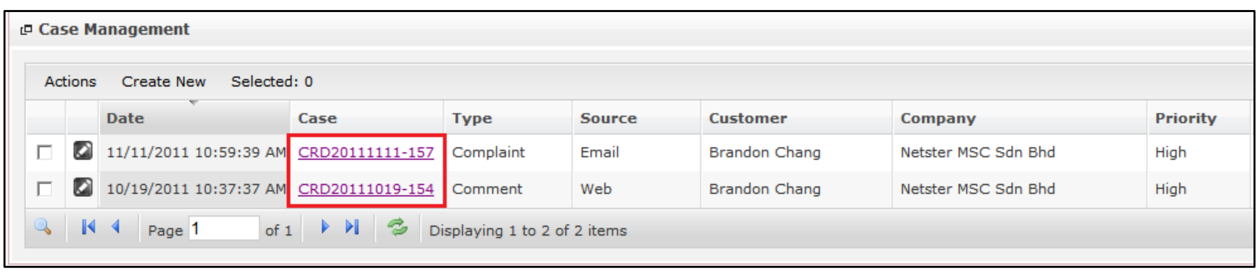


Figure 8.3: Case ID Hyperlink

After clicking the Case ID hyperlink, page will navigate to the **Case Management Detail** page which displays all the details of the Case include related **Activities**, **History** and **Issues**.

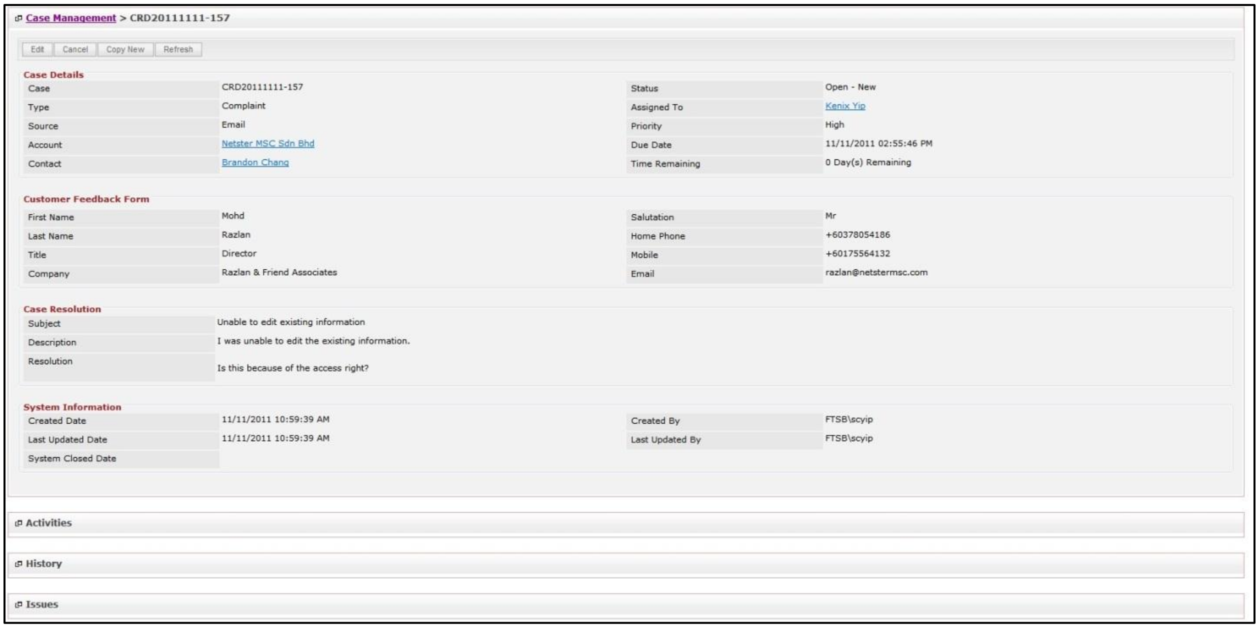


Figure 8.4: Case Management Detail Page

To copy the entire record and save as a new record, click Copy New button at **Case Maintenance Detail** page.

To create a new case, click at Create New menu at the top of the Case Listing.

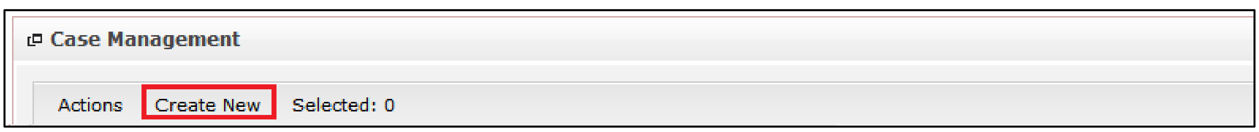


Figure 8.5: Create New Case Menu

After clicking Create New menu, page will navigate to **Case Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Case Management Detail** page or click Cancel button to cancel creating and navigates back to the **Case Listing** page.

***Related Topics**: See "[Create New Case]"*

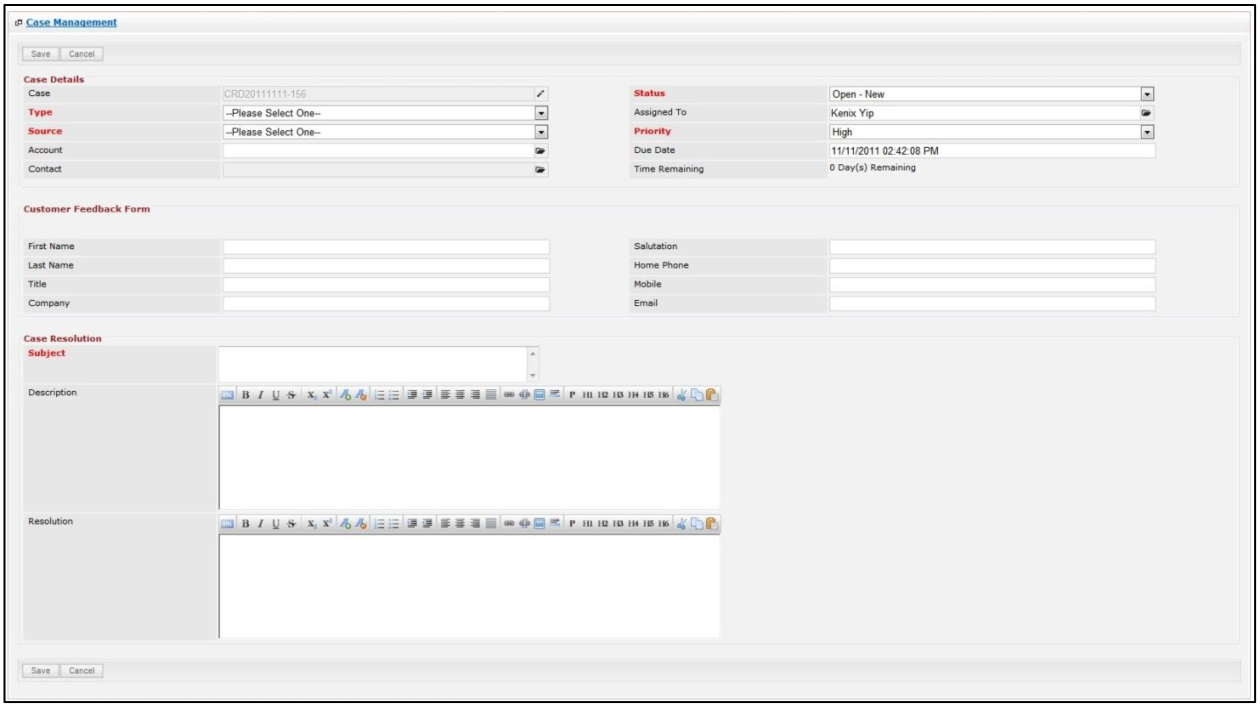


Figure 8.6: Case Management Create New Page

To **delete** a case, select the record and click **Actions > Delete**.

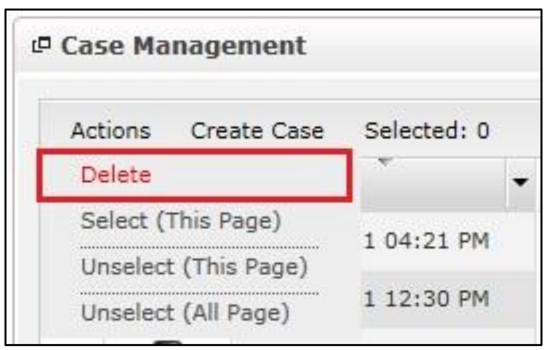


Figure 8.7: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 8.8: Message Showing Case Deleted Successfully

Deleted case will **no longer** be displayed in Case Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

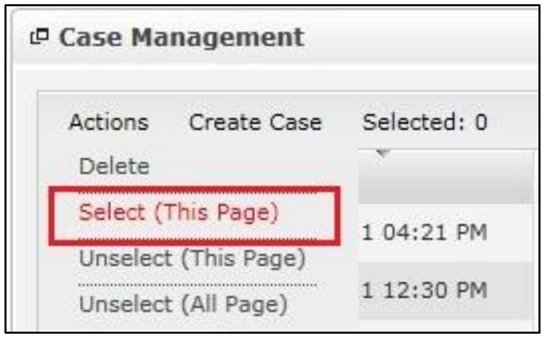


Figure 8.9: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

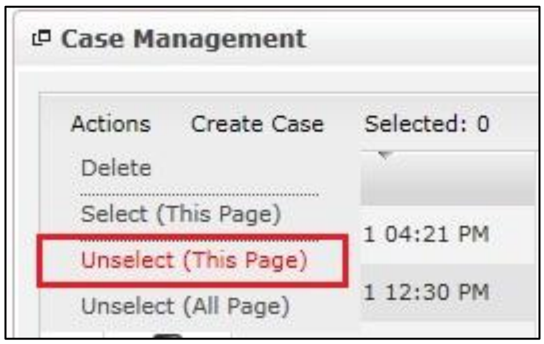


Figure 8.10: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

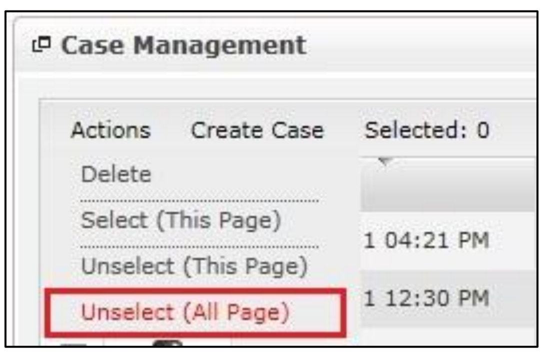


Figure 8.11: Actions > Unselect (All Pages) Menu

To go to the First Page of the listing, click at the **First Page** button.

To go to the Previous Page of the listing, click at the **Previous Page** button.

To go to the Next Page of the listing, click at the **Next Page** button.

To go to the Last Page of the listing, click at the **Last Page** button.

To refresh the listing page, click at the **Refresh** button.

To edit the details of the Case, click at the **Edit** button or click the Edit button in **Case Management Detail** page. After clicking at the **Edit** button page will navigate to the **Case Management Edit** page.

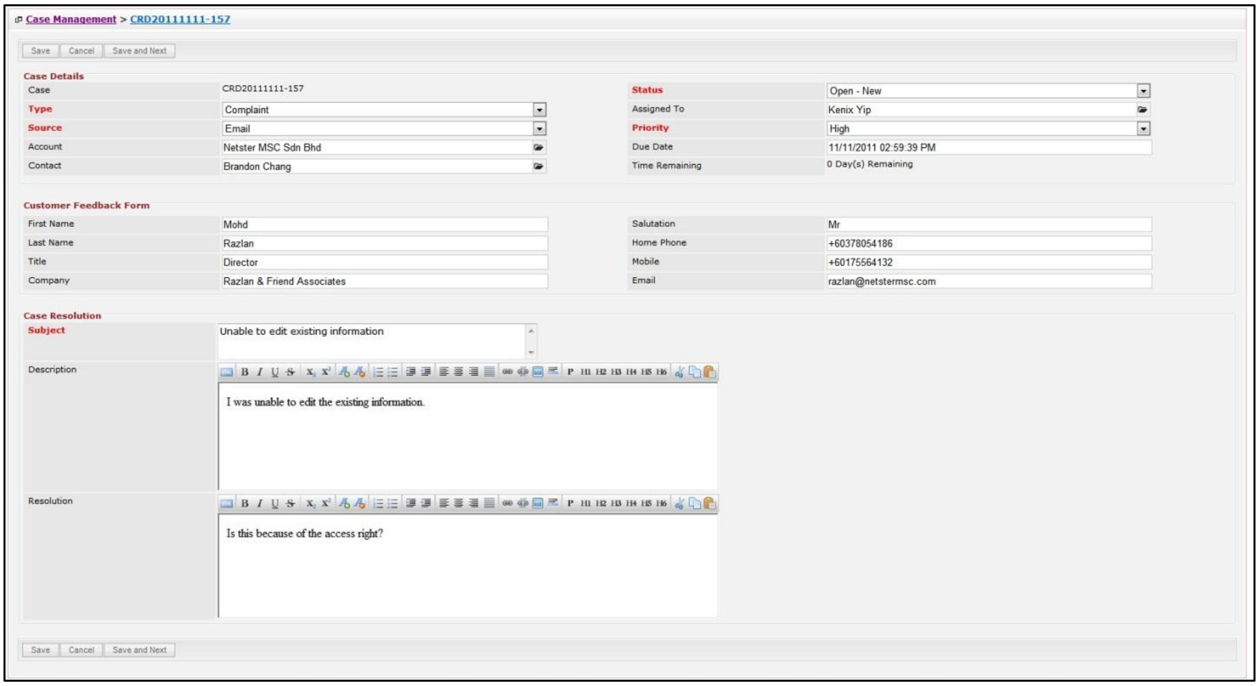


Figure 8.12: Case Management Edit Page

Edit the relevant details and click Save button to save the changes and navigates back to **Case Management Detail** page or click Save and Next button to save the changes and navigates to the **Case Management Edit** page of the next Case. Or click Cancel button to cancel editing and navigates back to the **Case Management Detail** page.

***Related Topics**: See "[Edit Case]"*

Create New Case

To create new case, click at the **Support > Case** menu at the Main Menu bar. Then click the Create New menu at the top of the **Case Listing**. After clicking Create New menu, page will navigate to **Case Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Case Management Detail** page.

There are **three** main sections to be filled in to create a new Case: **Case Details**, **Customer Feedback Form**, and **Case Resolution.**

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

7) **Case Details**

- Compulsory fields: **Type**, **Source**, **Status**, and **Priority**.

Figure 8.13: Create Case - Case Details

- **Type** field is the type of the case; Options will be **Comment**, **Complaint**, **Compliment**, **Enquiry**, **Suggestion**, **Support** or **Other**.
- **Source** field is the source of the case created; Options available are: **Call**, **Email**, **Fax**, **Letter**, **Walk In**, **Web** or **Other**.
- **Status** field is the status of the case created; Options available are: **Open – New**, **Open – Assigned**, **Closed**, **Closed – Rejected**, **Closed – Duplicate** or **Closed – KIV**.
- **Priority** field is the priority of the case created; Options available are: **High**, **Medium** or **Low**.
- **Due Date** field when clicked will populate a calendar for user to select the date and time for the Case. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Case is created. Click at the Done menu to set the date and time.

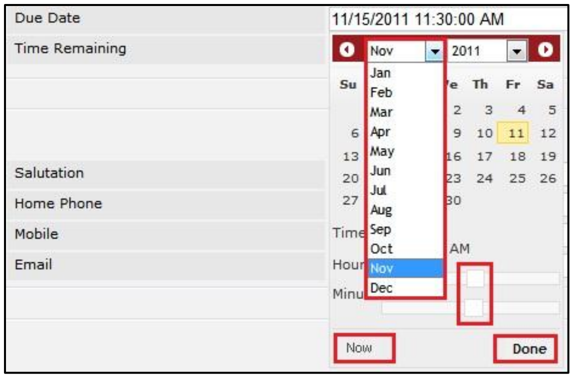


Figure 8.14: Due Date Time

- Once the Due Date is selected, **Time Remaining** field will auto-populate the remaining time (in day(s)) for the case.

8) **Customer Feedback Form**

- For user to enter the related Customer Details

Figure 8.15: Create Case – Customer Feedback Form

9) **Case Information**

- Compulsory fields: **Subject**.
- For user to enter the related Case Subject, Case Description and Resolution.

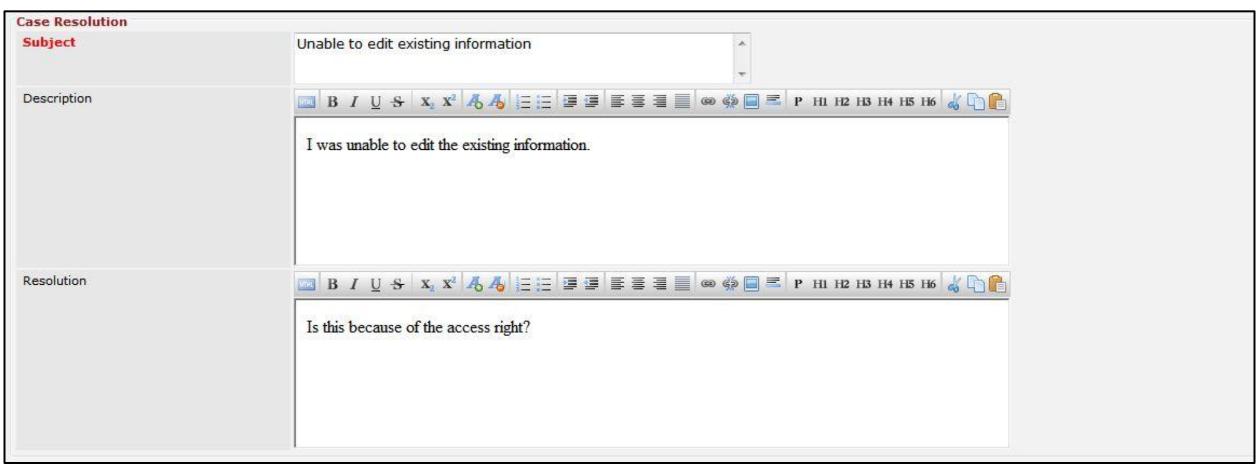
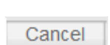


Figure 8.16: Create Contact – Case Resolution

To cancel creating New Case, click  button and navigates back to the **Case Listing** page.

Edit Case

To edit the details of the Case, click at the **Edit** button or click the Edit button in **Case Management Detail** page. After clicking the **Edit** button or Edit button, page will navigate to the **Case Management Edit** page. Edit the relevant details and click Save button to save the changes and navigates back to **Case Management Detail** page or click Save and Next button to save the changes and navigates to the **Case Management Edit page** for the next record.

There are **three** main sections of Case to be edited: **Case Details**, **Customer Feedback Form**, and **Case Information.**

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Case Details**

- Compulsory fields: **Type**, **Source**, **Status**, and **Priority**.


Case Details

Case	CRD20111111-157	Status	Open - New
Type	Complaint	Assigned To	Kenix Yip
Source	Email	Priority	High
Account	Netster MSC Sdn Bhd	Due Date	11/11/2011 02:59:39 PM
Contact	Brandon Chang	Time Remaining	0 Day(s) Remaining

Figure 8.17: Edit Case - Case Details

- **Type** field is the type of the case; Options will be **Comment**, **Complaint**, **Compliment**, **Enquiry**, **Suggestion**, **Support** or **Other**.
- **Source** field is the source of the case created; Options available are: **Call**, **Email**, **Fax**, **Letter**, **Walk In**, **Web** or **Other**.
- **Status** field is the status of the case created; Options available are: **Open – New**, **Open – Assigned**, **Closed**, **Closed – Rejected**, **Closed – Duplicate** or **Closed – KIV**.
- **Priority** field is the priority of the case created; Options available are: **High**, **Medium** or **Low**.
- **Due Date** field when clicked will populate a calendar for user to select the date and time for the Case. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Case is created. Click at the Done menu to set the date and time.

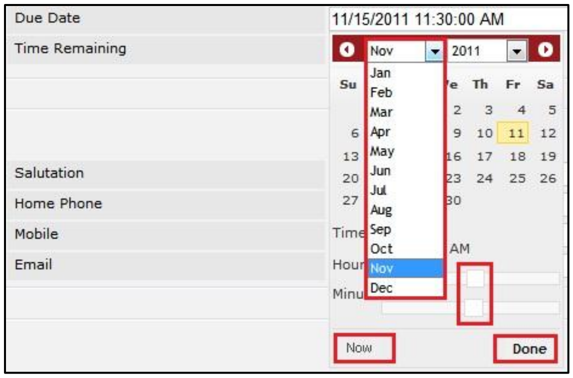


Figure 8.18: Due Date Time

- Once the Due Date is selected, **Time Remaining** field will auto-populate the remaining time (in day(s)) for the case.

2) **Customer Feedback Form**

- For user to enter the related Customer Details

Figure 8.19: Edit Case – Customer Feedback Form

3) **Case Information**

- Compulsory fields: **Subject**.
- For user to enter the related Case Subject, Case Description and Resolution.

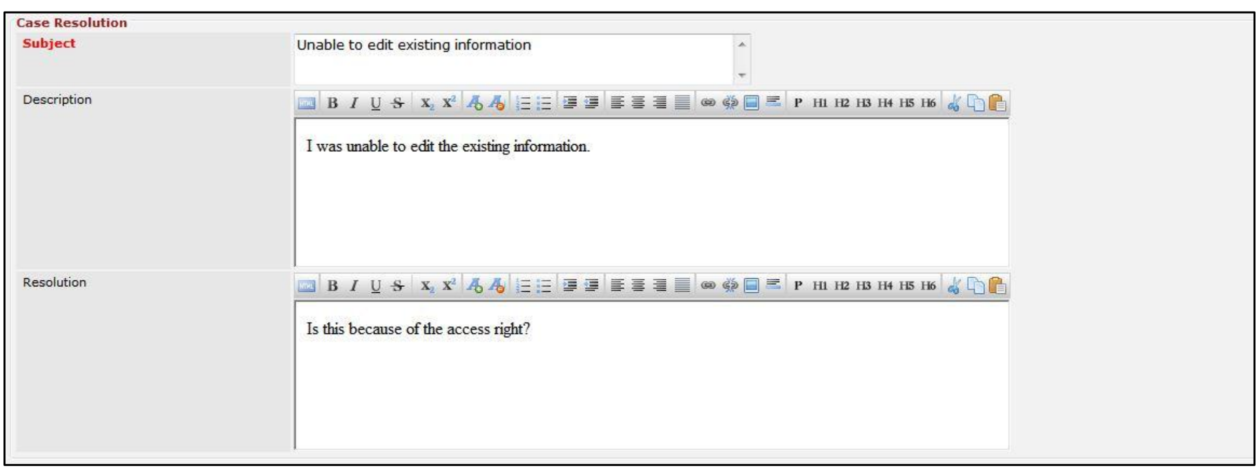


Figure 8.20: Edit Case – Case Resolution

To cancel editing Case, click Cancel button and navigates back to the **Case Management Detail** page.

Case – Activities Subpanel

This subpanel contains any activities related to the contact. **Call**, **Meeting** or **Task** created will be displayed in this **Activities** subpanel.

Case – Activities Subpanel (New Call)

To create a New Call related to a Case, click at the New Call menu at **Activities** subpanel. Once New Call menu is clicked, a Call Management window will pop up for user to create a New Call. Enter the details of the Call and click Save button to create the New Call.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

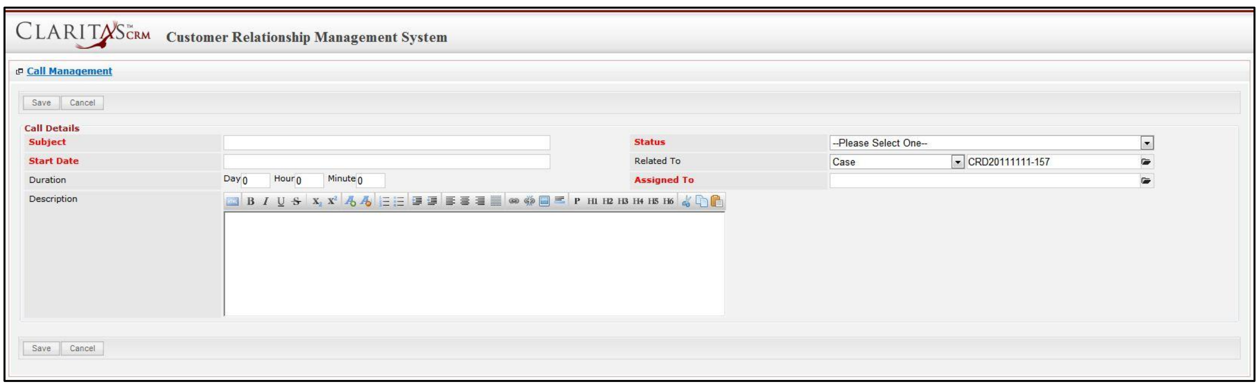


Figure 8.21: New Call Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Case**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Call. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Call is created. Click at the Done menu to set the date and time.

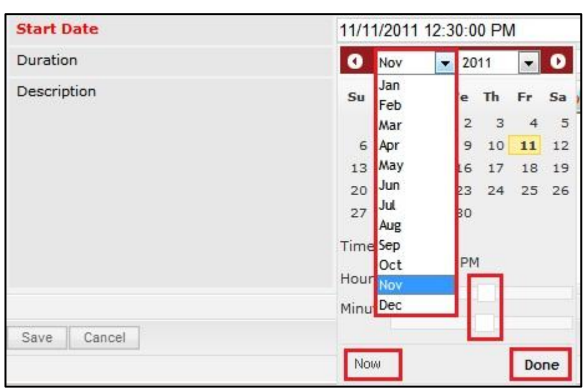
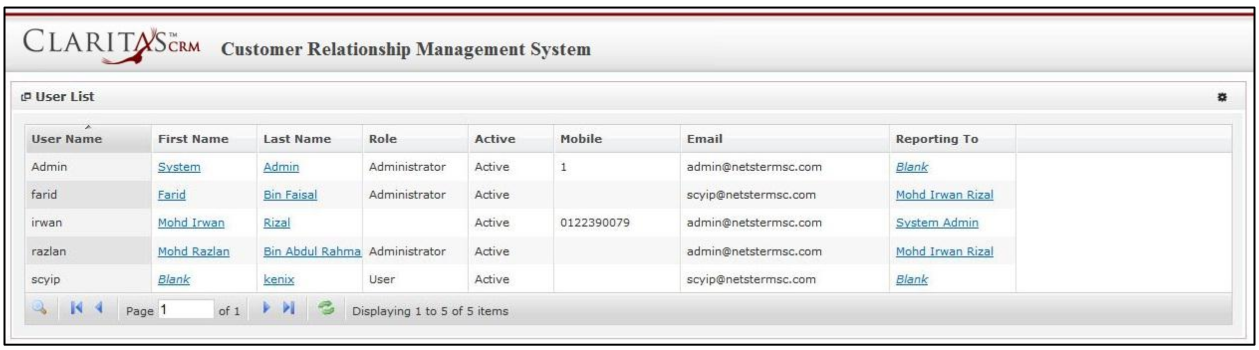


Figure 8.22: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Call for the related Case. There are two ways of entering the Assigned To field:
    i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 8.23: Assigned To Field Auto Complete Dropdown

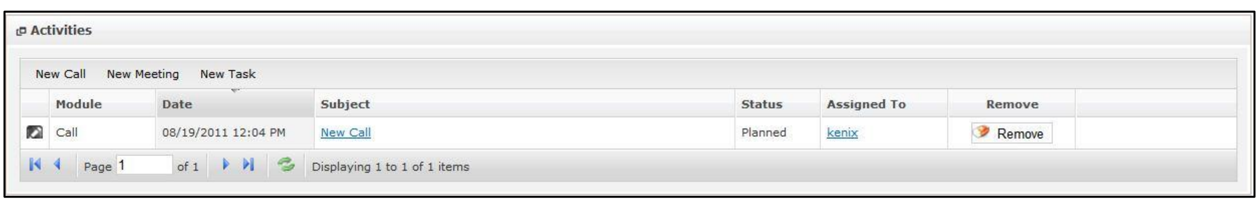
    ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Figure 8.24: Assigned To Popup

- After a New Call is created, the subpanel will auto-refresh and display the newly-created Call.



Module	Date	Subject	Status	Assigned To	Remove
Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Figure 8.25: Activities Subpanel List New Call

To **cancel creating New Call**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Call and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Call.

Case – Activities Subpanel (New Meeting)

To create a New Meeting related to a Case, click at the New Meeting menu at **Activities** subpanel. Once New Meeting menu is clicked, a Meeting Management window will pop up for user to create a New Meeting. Enter the details of the Meeting and click Save button to create the New Meeting.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

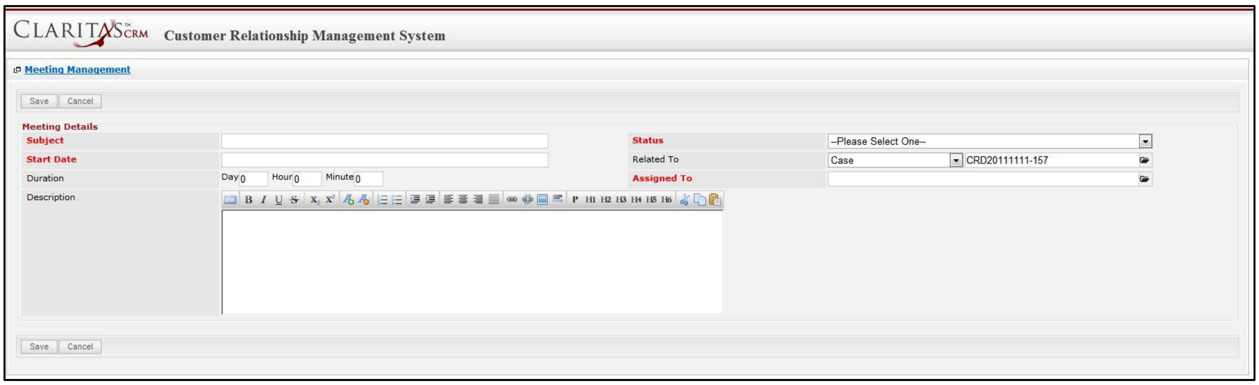


Figure 8.26: New Meeting Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Case**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Meeting. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Meeting is created. Click at the Done menu to set the date and time.

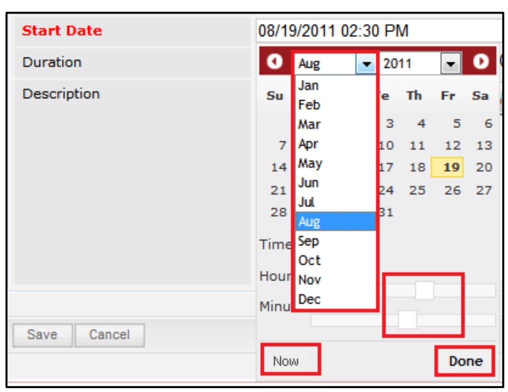


Figure 8.27: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Meeting for the related **Case**. There are two ways of entering the **Assigned To** field:

i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)

OR

Figure 8.28: Assigned To Field Auto Complete Dropdown

ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

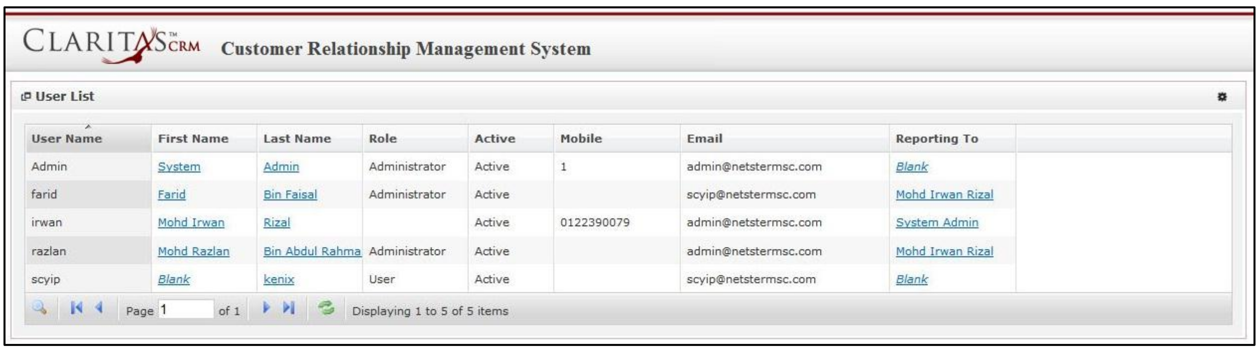


Figure 8.29: Assigned To Popup

- After a New Meeting is created, the subpanel will auto-refresh and display the newly-created Meeting.

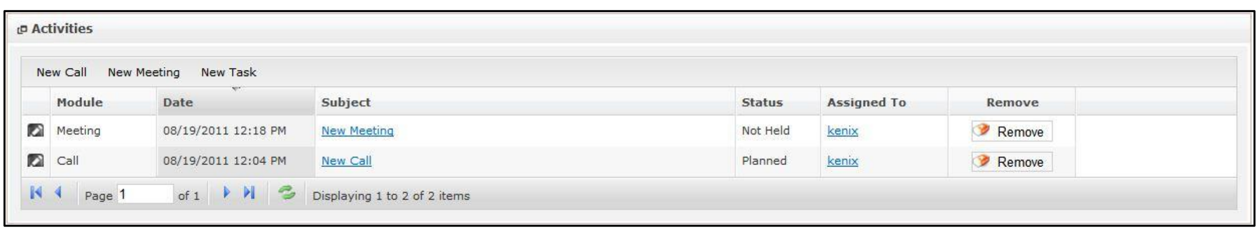


Figure 8.30: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Meeting and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Meeting.

Case – Activities Subpanel (New Task)

To create a New Task related to a Case, click at the New Task menu at **Activities** subpanel. Once New Task menu is clicked, a Task Management window will pop up for user to create a New Task. Enter the details of the Task and click Save button to create the New Task. Or click Cancel menu to cancel creating New Task.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

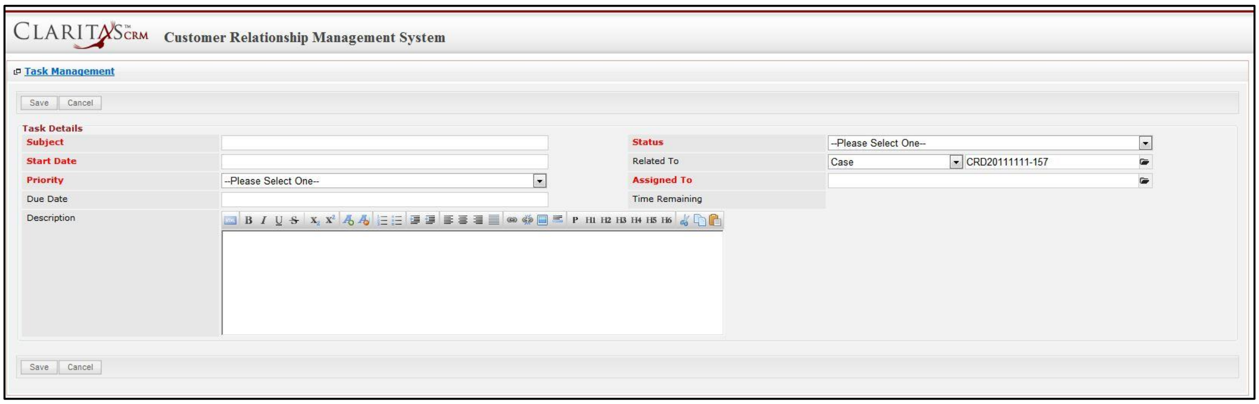


Figure 8.31: New Task Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Priority**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Case**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Task. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Task is created. Click at the Done menu to set the date and time.

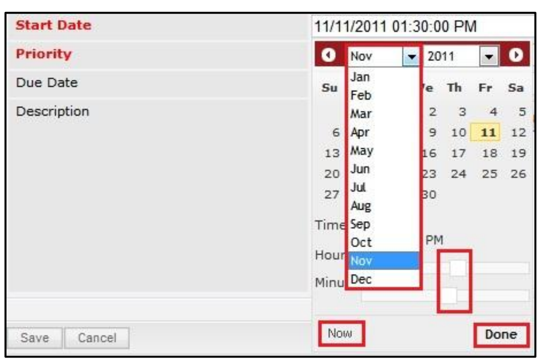


Figure 8.32: Start Date Time

- **Priority** field once selected will auto-populate the **Due Date** field and **Time Remaining** accordingly.

- There are five **Statuses** available for Task- **Not Started**, **In Progress**, **Completed**, **Pending Input**, and **Deferred.**
- **Assigned To** field is to assign a User to in charge of the Task for the related Case. There are two ways of entering the Assigned To field:
  i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 8.33: Assigned To Field Auto Complete Dropdown

  ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

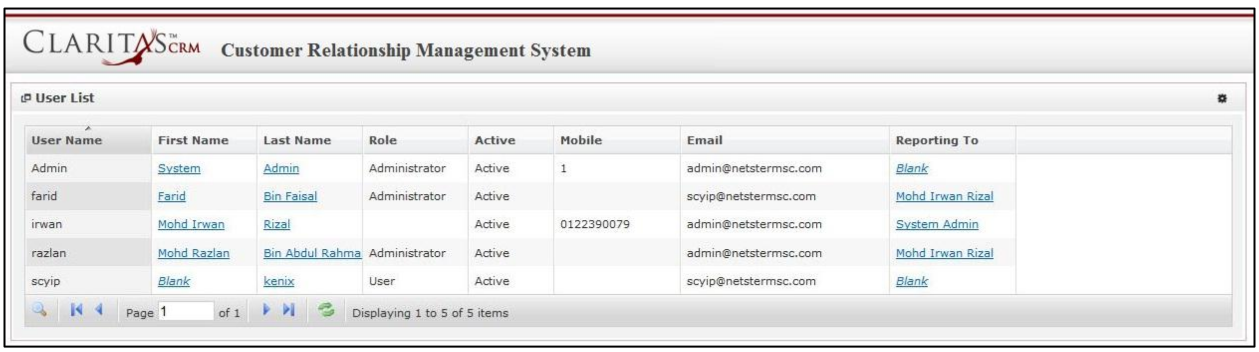


Figure 8.34: Assigned To Popup

- After a New Task is created, the subpanel will auto-refresh and display the newly-created Task.

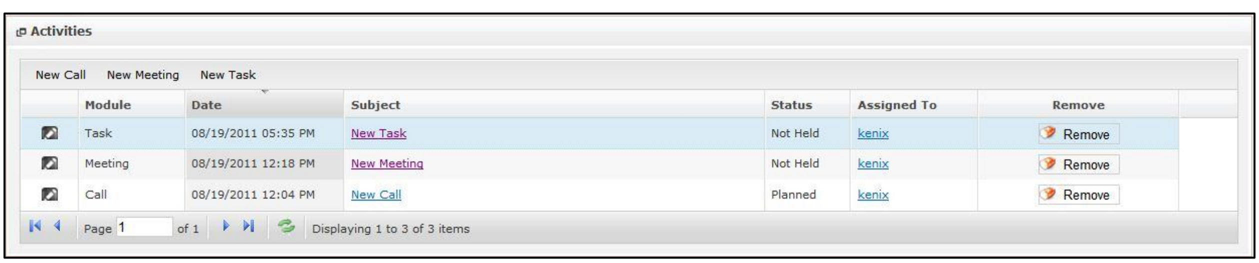


Figure 8.35: Activities Subpanel List New Task

To **cancel creating New Task**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Task and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Task.

Case – History Subpanel

This subpanel contains any history or note related to the Case.

Case – History Subpanel (New Note)

To create a New Note related to a Case, click at the New Note menu at **History** subpanel. Once New Note menu is clicked, a Note Management window will pop up for user to create a New Note. Enter the details of the Note and click Save button to create the New Note.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

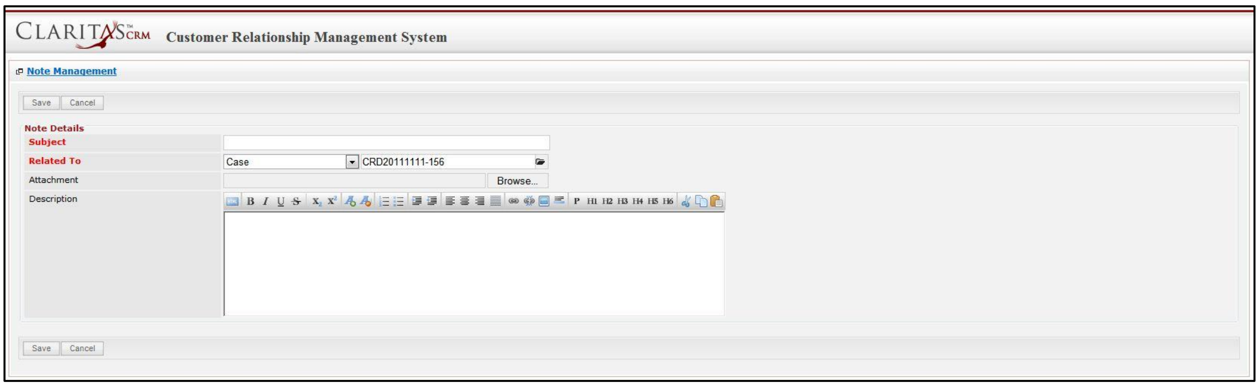


Figure 8.36: New Note Management Popup

- Compulsory fields: **Subject**, and **Related To**.
- **Related To** field will auto populate the name of the related **Case**.
- **Attachment** field allow file extensions are as below (format that is not stated are not allowed to be uploaded):
  - **Documents:** .doc, .docx, .xls, .xlsx, . rtf, .txt, .pdf, .ppt, .pptx
  - **Pictures:** .jpg, .bmp, .png, .bmp, .gif
  - **Audio:** .mp3, .wma
  - **Video:** **.**3gp, .mp4, .rmvb, .avi, .flv
  - **Archive:** .zip, .rar
- After a New Task is created, the subpanel will auto-refresh and display the newly-created Note.

Figure 8.37: History Subpanel List New Task

To **cancel creating New Note**, click Cancel button. A confirmation dialog showing “Are you sure you want to close this window?” will prompt user to cancel creating New Note and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Note.

Case – Issues Subpanel

This subpanel contains any Issue related to the **Case**.

Create New Issue

To create a New Issue related to a Case, click at the Create New menu at **Issue** subpanel. Once Create New menu is clicked, an Issue Management window will pop up for user to create a New Issue.

Enter the details of the Issue and click Save button to create the New Issue.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

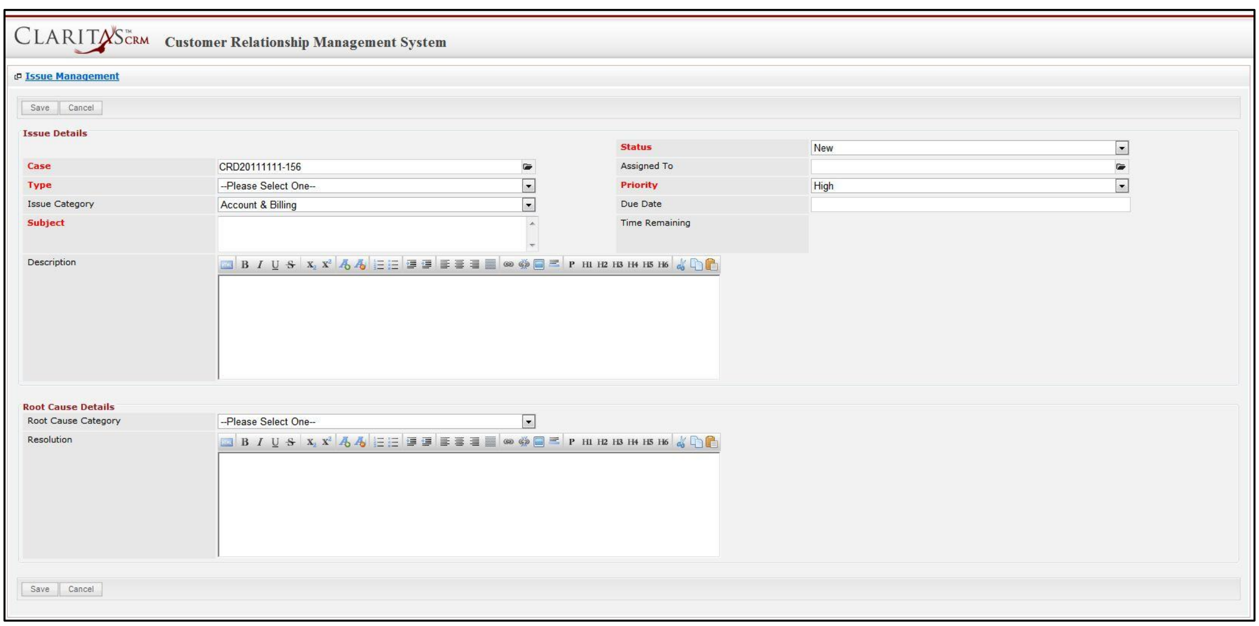


Figure 8.38: New Issue Management Popup

- Compulsory fields: **Case**, **Type**, **Subject**, **Status** and **Priority**.
- **Case** field will auto populate the name of the related **Case**.

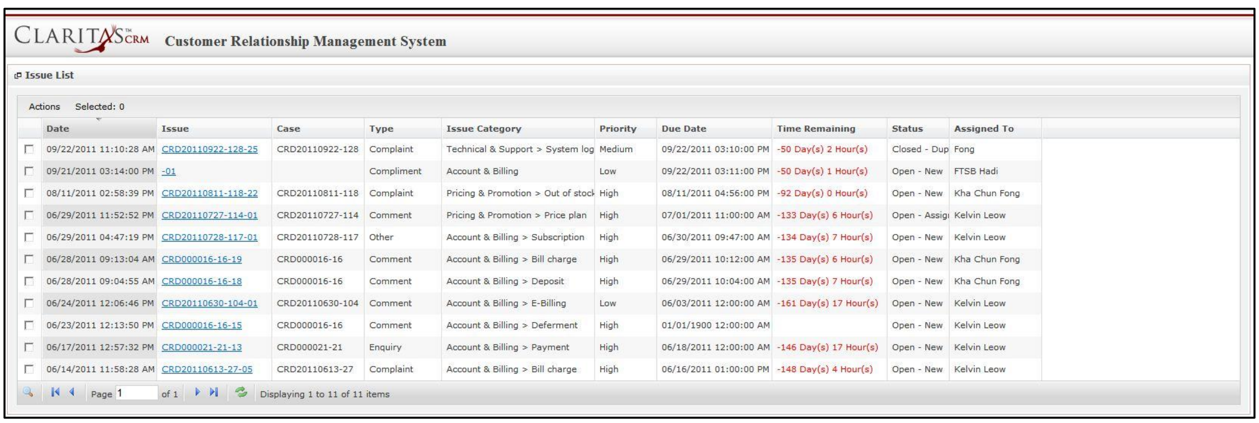
- **Type** field is the type of the case; Options will be **Comment**, **Complaint**, **Compliment**, **Enquiry**, **Suggestion**, **Support** or **Other**.
- **Status** field is the status of the case created; Options available are: **New**, **Assigned**, **Closed**, **Pending Input**, **Closed – Reject** or **Closed – Duplicate**.
- **Priority** field is the priority of the case created; Options available are: **High**, **Medium** or **Low**.

To **cancel creating New Issue**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Issue and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Issue.

Select Issue

To select an **Issue** to this **Case**, click at the Select menu. Once Select menu is clicked, an **Issue List** window will pop up for user to select an **Issue**. Click at the **Issue Name** hyperlink in **Issue Name** column to select the **Issue** that associate with this **Case**.



Date	Issue	Case	Type	Issue Category	Priority	Due Date	Time Remaining	Status	Assigned To
09/22/2011 11:10:28 AM	CRD20110922-128-25	CRD20110922-128	Complaint	Technical & Support > System log	Medium	09/22/2011 03:10:00 PM	-50 Day(s) 2 Hour(s)	Closed - Dup	Fong
09/21/2011 03:14:00 PM	-01		Compliment	Account & Billing	Low	09/22/2011 03:11:00 PM	-50 Day(s) 1 Hour(s)	Open - New	FTSB Hadi
08/11/2011 02:58:39 PM	CRD20110811-118-22	CRD20110811-118	Complaint	Pricing & Promotion > Out of stock	High	08/11/2011 04:56:00 PM	-92 Day(s) 0 Hour(s)	Open - New	Kha Chun Fong
06/29/2011 11:52:52 PM	CRD20110727-114-01	CRD20110727-114	Comment	Pricing & Promotion > Price plan	High	07/01/2011 11:00:00 AM	-133 Day(s) 6 Hour(s)	Open - Assig	Kelvin Leow
06/29/2011 04:47:19 PM	CRD20110728-117-01	CRD20110728-117	Other	Account & Billing > Subscription	High	06/30/2011 09:47:00 AM	-134 Day(s) 7 Hour(s)	Open - New	Kelvin Leow
06/28/2011 09:13:04 AM	CRD000016-16-19	CRD000016-16	Comment	Account & Billing > Bill charge	High	06/29/2011 10:12:00 AM	-135 Day(s) 6 Hour(s)	Open - New	Kha Chun Fong
06/28/2011 09:04:55 AM	CRD000016-16-18	CRD000016-16	Comment	Account & Billing > Deposit	High	06/29/2011 10:04:00 AM	-135 Day(s) 7 Hour(s)	Open - New	Kha Chun Fong
06/24/2011 12:06:46 PM	CRD20110630-104-01	CRD20110630-104	Comment	Account & Billing > E-Billing	Low	06/03/2011 12:00:00 AM	-161 Day(s) 17 Hour(s)	Open - New	Kelvin Leow
06/23/2011 12:13:50 PM	CRD000016-16-15	CRD000016-16	Comment	Account & Billing > Deferment	High	01/01/1900 12:00:00 AM		Open - New	Kelvin Leow
06/17/2011 12:57:32 PM	CRD000021-21-13	CRD000021-21	Enquiry	Account & Billing > Payment	High	06/18/2011 12:00:00 AM	-146 Day(s) 17 Hour(s)	Open - New	Kelvin Leow
06/14/2011 11:58:28 AM	CRD20110613-27-05	CRD20110613-27	Complaint	Account & Billing > Bill charge	High	06/16/2011 01:00:00 PM	-148 Day(s) 4 Hour(s)	Open - New	Kelvin Leow

Figure 8.39: Select Issue Popup

9 Support – Issue

This module is to **create and store Issue details**.

Issue Listing

To view Issue Listing, click at the **Support > Issue** menu at the Main Menu bar.

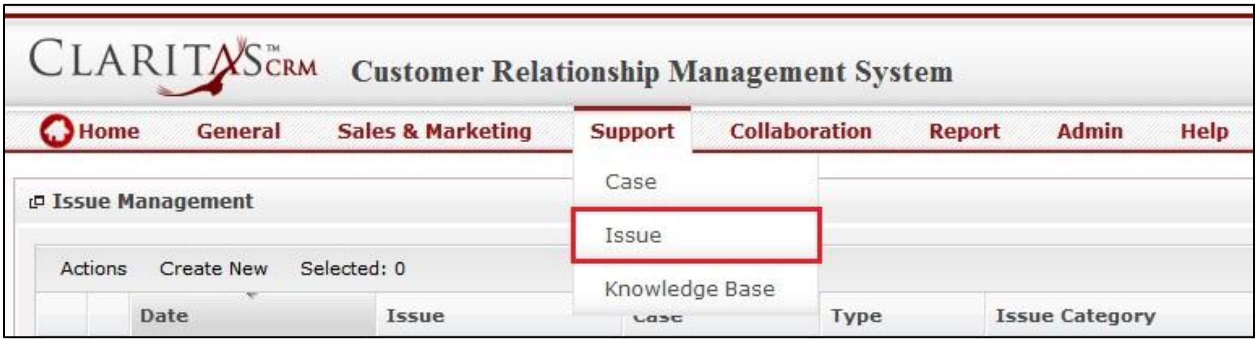
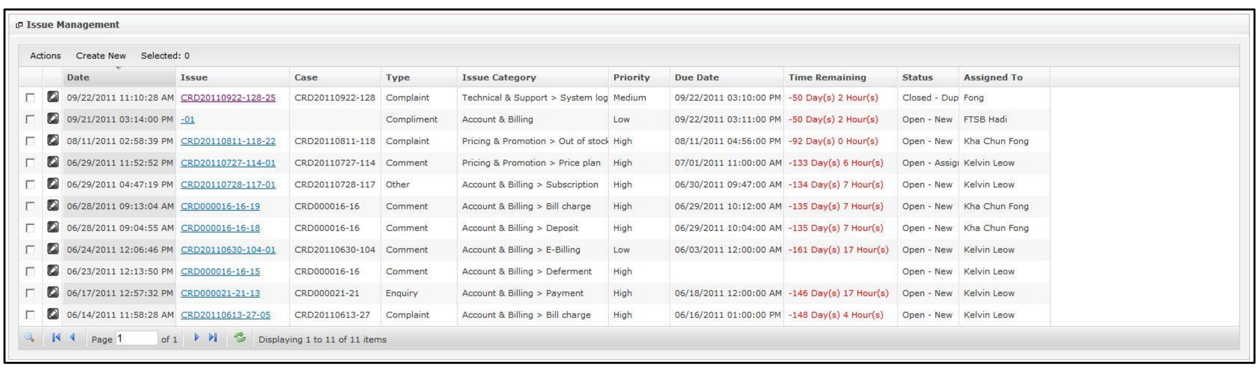


Figure 9.1: Issue Menu in Main Menu

Page will load the list of the Issue available in the system.



Date	Issue	Case	Type	Issue Category	Priority	Due Date	Time Remaining	Status	Assigned To
09/22/2011 11:10:28 AM	CRD20110922-128-25	CRD20110922-128	Complaint	Technical & Support > System log	Medium	09/22/2011 03:10:00 PM	-50 Day(s) 2 Hour(s)	Closed - Dup	Fong
09/21/2011 03:14:00 PM	-01		Compliment	Account & Billing	Low	09/22/2011 03:11:00 PM	-50 Day(s) 2 Hour(s)	Open - New	FTSB Hadi
08/11/2011 02:58:39 PM	CRD20110811-118-22	CRD20110811-118	Complaint	Pricing & Promotion > Out of stock	High	08/11/2011 04:56:00 PM	-92 Day(s) 0 Hour(s)	Open - New	Kha Chun Fong
06/29/2011 11:52:52 PM	CRD20110727-114-01	CRD20110727-114	Comment	Pricing & Promotion > Price plan	High	07/01/2011 11:00:00 AM	-133 Day(s) 6 Hour(s)	Open - Assign	Kelvin Leow
06/29/2011 04:47:19 PM	CRD20110728-117-01	CRD20110728-117	Other	Account & Billing > Subscription	High	06/30/2011 09:47:00 AM	-134 Day(s) 7 Hour(s)	Open - New	Kelvin Leow
06/28/2011 09:13:04 AM	CRD000016-16-19	CRD000016-16	Comment	Account & Billing > Bill charge	High	06/29/2011 10:12:00 AM	-135 Day(s) 7 Hour(s)	Open - New	Kha Chun Fong
06/28/2011 09:04:55 AM	CRD000016-16-18	CRD000016-16	Comment	Account & Billing > Deposit	High	06/29/2011 10:04:00 AM	-135 Day(s) 7 Hour(s)	Open - New	Kha Chun Fong
06/24/2011 12:06:46 PM	CRD20110630-104-01	CRD20110630-104	Comment	Account & Billing > E-Billing	Low	06/03/2011 12:00:00 AM	-161 Day(s) 17 Hour(s)	Open - New	Kelvin Leow
06/23/2011 12:13:50 PM	CRD000016-16-15	CRD000016-16	Comment	Account & Billing > Deferment	High			Open - New	Kelvin Leow
06/17/2011 12:57:32 PM	CRD000021-21-13	CRD000021-21	Enquiry	Account & Billing > Payment	High	06/18/2011 12:00:00 AM	-146 Day(s) 17 Hour(s)	Open - New	Kelvin Leow
06/14/2011 11:58:28 AM	CRD20110613-27-05	CRD20110613-27	Complaint	Account & Billing > Bill charge	High	06/16/2011 01:00:00 PM	-148 Day(s) 4 Hour(s)	Open - New	Kelvin Leow

Page 1 of 1 Displaying 1 to 11 of 11 items

Figure 9.2: Issue Listing

To view the Issue Details, click at the <u>Issue ID</u> hyperlink in Issue column.

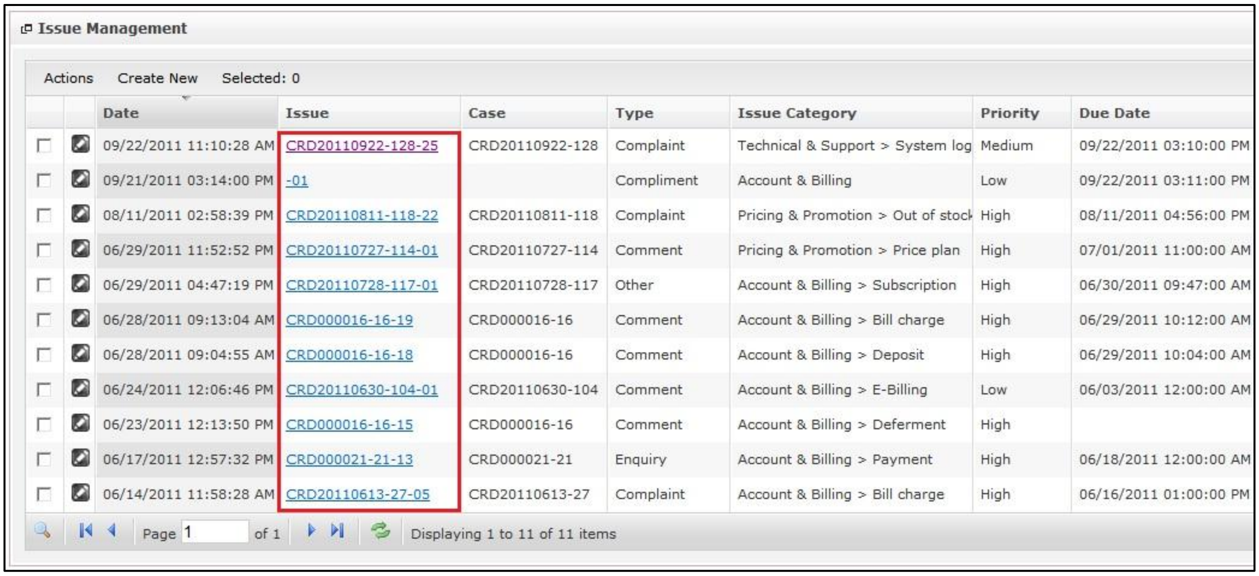


Figure 9.3: Issue ID Hyperlink

After clicking the <u>Issue ID</u> hyperlink, page will navigate to the **Issue Management Detail** page which displays all the details of the Issue include related **Activities**, **History** and **Knowledge Base**.

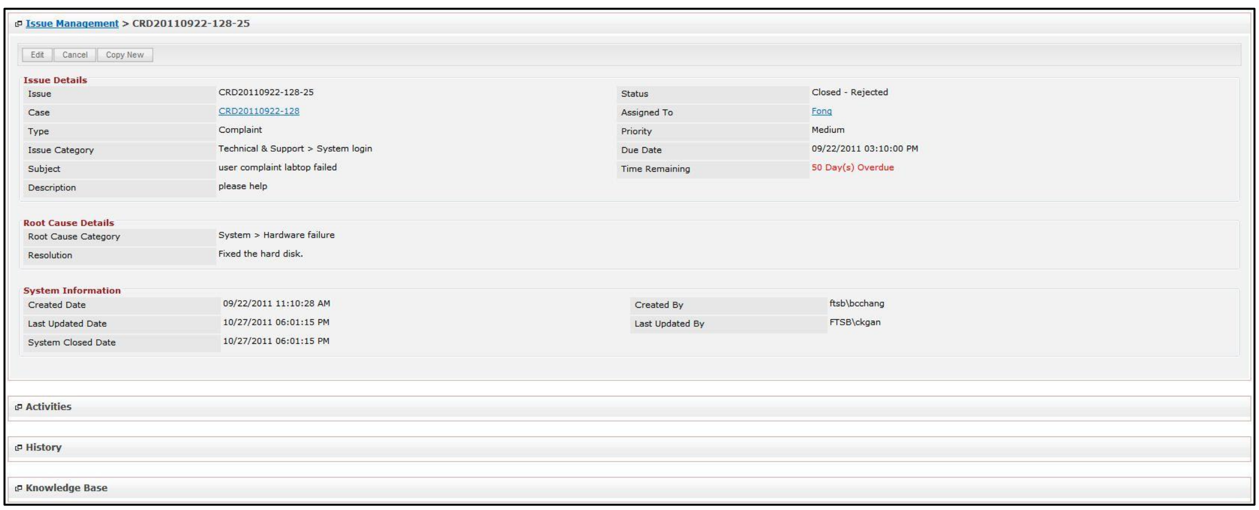


Figure 9.4: Issue Management Detail Page

To copy the entire record and save as a new record, click Copy New button at **User Maintenance Detail** page.

To create a new Issue, click at Create New menu at the top of the Issue Listing.

Figure 9.5: Create New Issue Menu

After clicking Create New menu, page will navigate to **Issue Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Issue Management Detail** page or click Cancel button to cancel creating and navigates back to the **Issue Listing** page.

***Related Topics**: See "[Create New Issue](#)"*

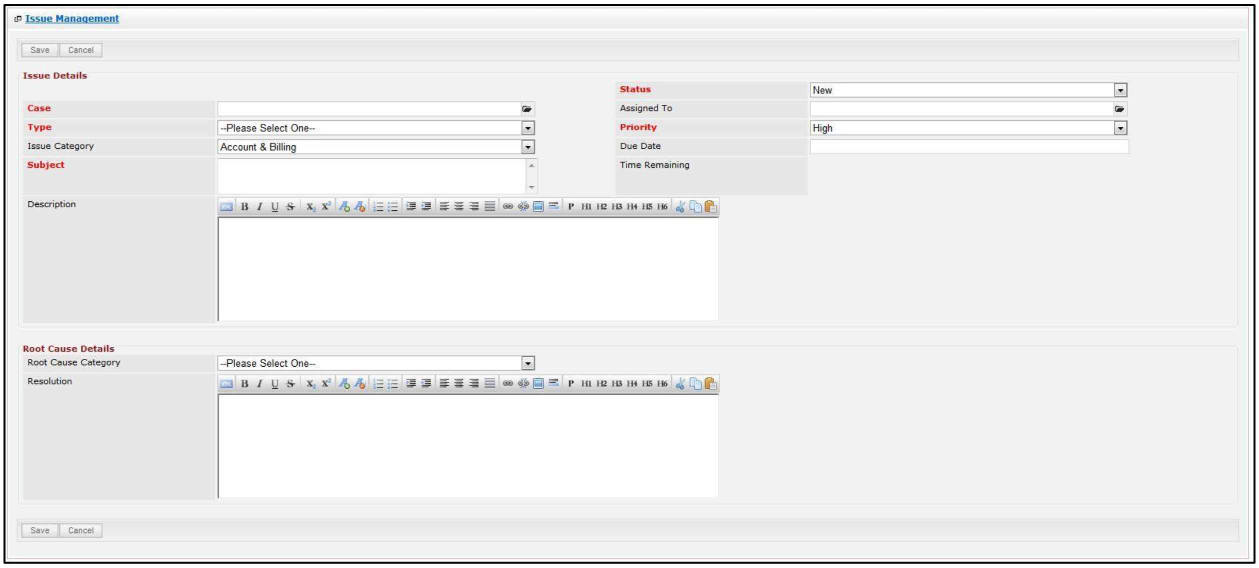


Figure 9.6: Issue Management Create New Page

To **delete** an Issue, select the record and click **Actions > Delete**.

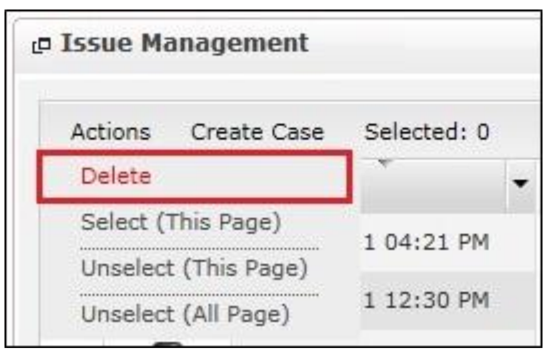


Figure 9.7: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 9.8: Message Showing Issue Deleted Successfully

Deleted Issue will **no longer** be displayed in Issue Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

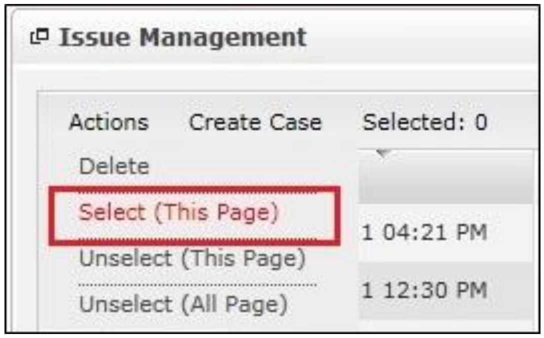


Figure 9.9: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

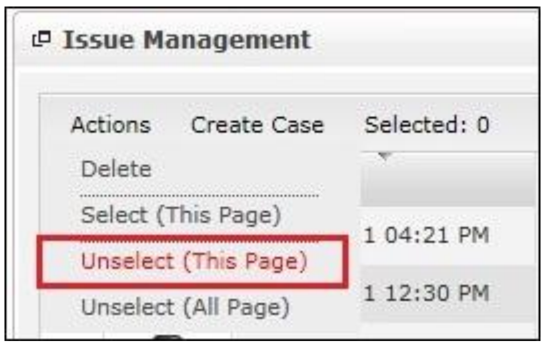


Figure 9.10: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

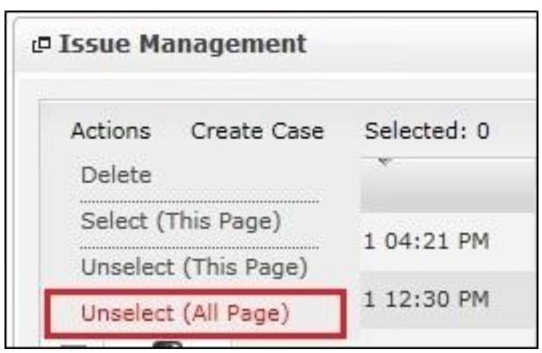


Figure 9.11: Actions > Unselect (All Pages) Menu

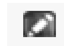
To go to the First Page of the listing, click at the **First Page**  button.

To go to the Previous Page of the listing, click at the **Previous Page**  button.

To go to the Next Page of the listing, click at the **Next Page**  button.

To go to the Last Page of the listing, click at the **Last Page**  button.

To refresh the listing page, click at the **Refresh**  button.

To edit the details of the Issue, click at the **Edit**  button or click the 

button in **Issue Management Detail** page. After clicking at the **Edit**  button page will navigate to the **Issue Management Edit** page.

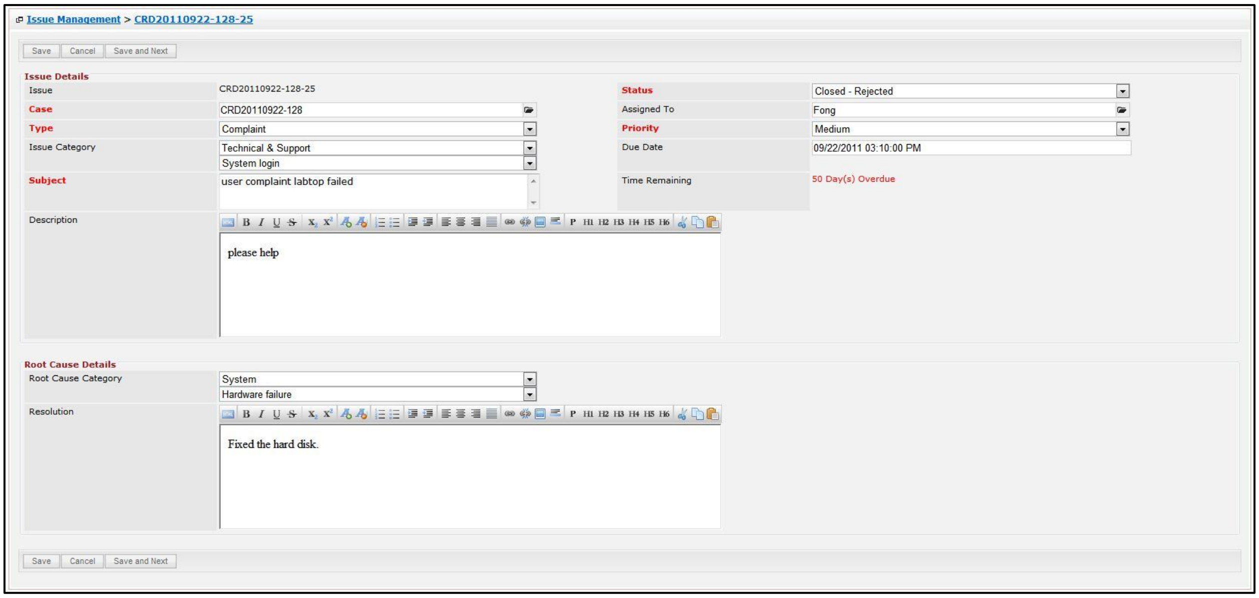
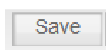
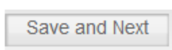
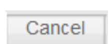


Figure 9.12: Issue Management Edit Page

Edit the relevant details and click 

button to save the changes and navigates back to **Issue Management Detail** page or click 

button to save the changes and navigates to the **Issue Management Edit** page of the next Issue. Or click 

button to cancel editing and navigates back to the **Issue Management Detail** page.

***Related Topics**: See "Edit Issue"*

Create New Issue

To create new Issue, click at the **Support > Issue** menu at the Main Menu bar. Then click the Create New menu at the top of the **Issue Listing**. After clicking Create New menu, page will navigate to **Issue Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Issue Management Detail** page.

There are **two** main sections to be filled in to create a new Issue: **Issue Details** and **Root Cause Details.**

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Issue Details**

- Compulsory fields: **Case**, **Type**, **Subject**, **Status** and **Priority**.

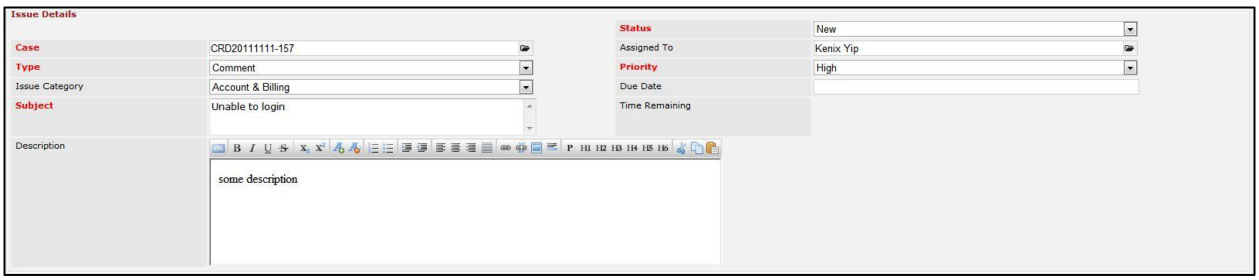


Figure 9.13: Create Issue - Issue Details

- **Case** field is to associate the issue to the related Case. There are two ways of entering the **Case** field:

    i. Type in the Case ID and wait for the **auto-complete** dropdown of the Case, if the case id entered does not match any of the available cases; the textbox will be auto-cleared. (Click at the Case ID to select the Case) **OR**

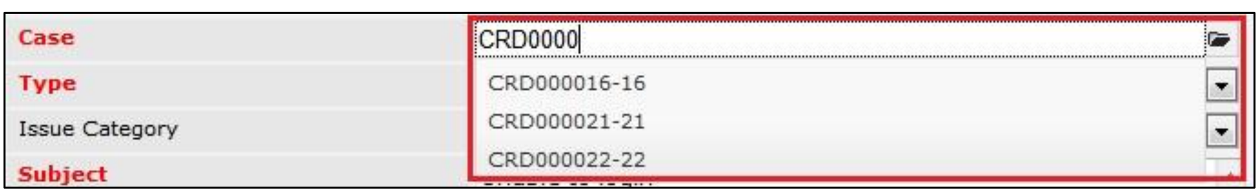
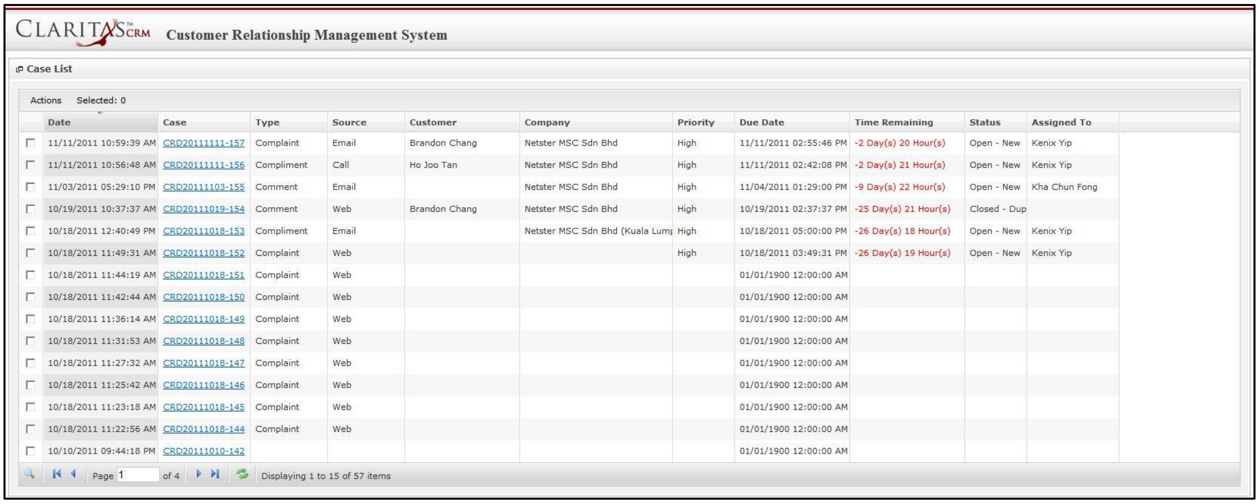


Figure 9.14: Case Field Auto Complete Dropdown

    ii. Click at the button to open a new popup containing the list of all Cases. (Click at the Case ID hyperlink to select the Case)



Date	Case	Type	Source	Customer	Company	Priority	Due Date	Time Remaining	Status	Assigned To
11/11/2011 10:59:39 AM	CRD20111111-157	Complaint	Email	Brandon Chang	Netster MSC Sdn Bhd	High	11/11/2011 02:55:46 PM	-2 Day(s) 20 Hour(s)	Open - New	Kenix Yip
11/11/2011 10:56:48 AM	CRD20111111-156	Compliment	Call	Ho Joo Tan	Netster MSC Sdn Bhd	High	11/11/2011 02:42:08 PM	-2 Day(s) 21 Hour(s)	Open - New	Kenix Yip
11/03/2011 05:29:10 PM	CRD20111103-155	Comment	Email		Netster MSC Sdn Bhd	High	11/04/2011 01:29:00 PM	-9 Day(s) 22 Hour(s)	Open - New	Kha Chun Fong
10/19/2011 10:37:37 AM	CRD20111019-154	Comment	Web	Brandon Chang	Netster MSC Sdn Bhd	High	10/19/2011 02:37:37 PM	-25 Day(s) 21 Hour(s)	Closed - Dup	
10/18/2011 12:40:49 PM	CRD20111018-153	Compliment	Email		Netster MSC Sdn Bhd (Kuala Lump	High	10/18/2011 05:00:00 PM	-26 Day(s) 18 Hour(s)	Open - New	Kenix Yip
10/18/2011 11:49:31 AM	CRD20111018-152	Complaint	Web			High	10/18/2011 03:49:31 PM	-26 Day(s) 19 Hour(s)	Open - New	Kenix Yip
10/18/2011 11:44:19 AM	CRD20111018-151	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:42:44 AM	CRD20111018-150	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:36:14 AM	CRD20111018-149	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:31:53 AM	CRD20111018-148	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:27:32 AM	CRD20111018-147	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:25:42 AM	CRD20111018-146	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:23:18 AM	CRD20111018-145	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:22:56 AM	CRD20111018-144	Complaint	Web				01/01/1900 12:00:00 AM			
10/10/2011 09:44:18 PM	CRD20111010-142						01/01/1900 12:00:00 AM			

Page 1 of 4 Displaying 1 to 15 of 57 items

Figure 9.15: Case Popup

- **Type** field is the type of the Issue; Options will be **Comment**, **Complaint**, **Compliment**, **Enquiry**, **Suggestion**, **Support** or **Other**.
- **Subject** field is the subject name of the issue.
- **Status** field is the status of the Issue created; Options available are: **New**, **Assigned**, **Closed**, **Closed**, **Pending Input**, **Closed – Rejected** or **Closed – Duplicate**.
- **Priority** field is the priority of the Issue created; Options available are: **High**, **Medium** or **Low**.
- **Due Date** field when clicked will populate a calendar for user to select the date and time for the Issue. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Issue is created. Click at the Done menu to set the date and time.

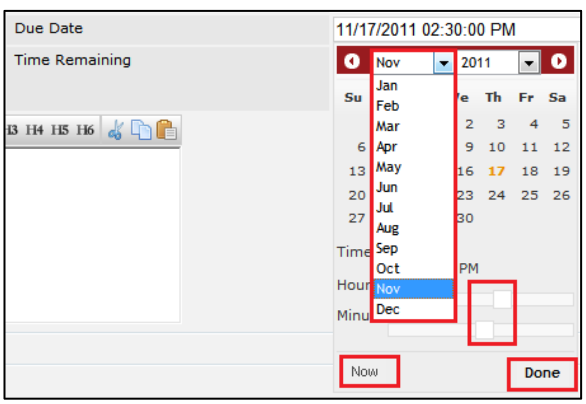


Figure 9.16: Due Date Time

- Once the Due Date is selected, **Time Remaining** field will auto-populate the remaining time (in day(s)) for the Issue.

2) **Root Cause Details**

- For user to enter the root cause details – Root Cause Category and Resolution.

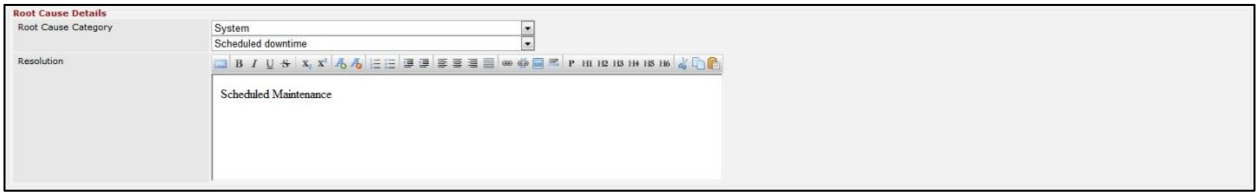


Figure 9.17: Create Issue – Root Cause Details

To cancel creating New Issue, click Cancel button and navigates back to the **Issue Listing** page.

Edit Issue

To edit the details of the Issue, click at the **Edit** button or click the Edit button in **Issue Management Detail** page. After clicking the **Edit** button or Edit button, page will navigate to the **Issue Management Edit** page. Edit the relevant details and click Save button to save the changes and navigates back to **Issue Management Detail** page or click Save and Next button to save the changes and navigates to the **Issue Management Edit page** for the next record.

There are **two** main sections of Issue to be edited: **Issue Details** and **Root Cause Details.**

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Issue Details**

- Compulsory fields: **Case**, **Type**, **Subject**, **Status** and **Priority**.

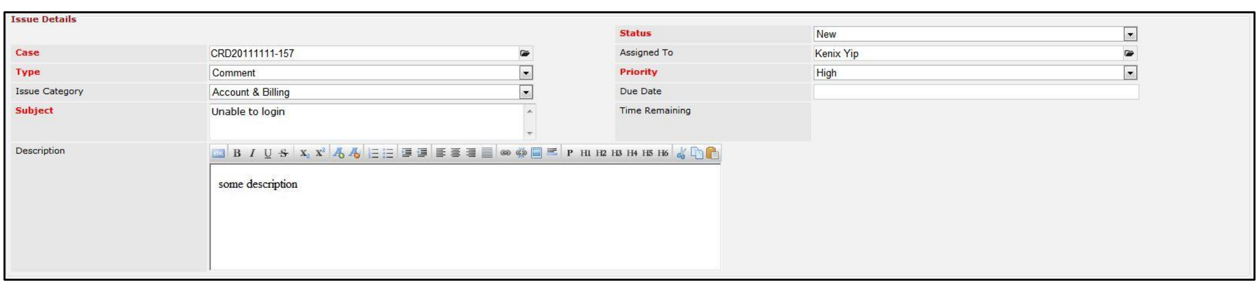


Figure 9.18: Edit Issue - Issue Details

- **Case** field is to associate the issue to the related Case. There are two ways of entering the **Case** field:
    i. Type in the Case ID and wait for the **auto-complete** dropdown of the Case, if the case id entered does not match any of the available cases; the textbox will be auto-cleared. (Click at the Case ID to select the Case) **OR**

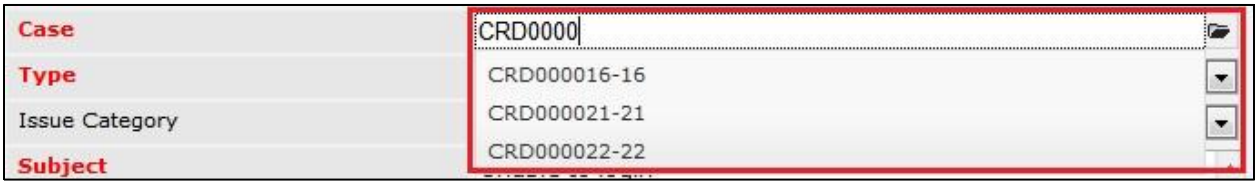
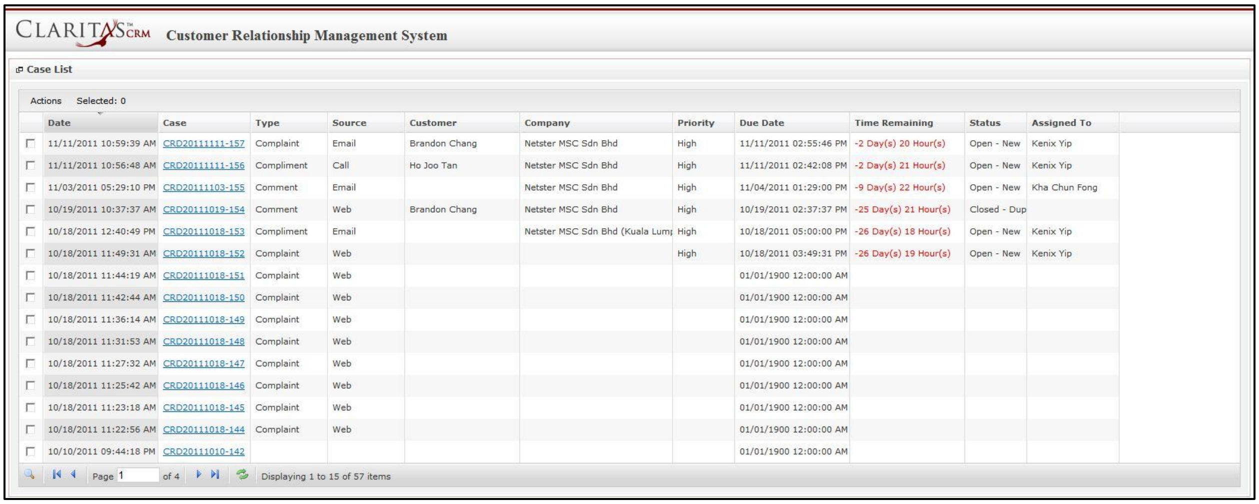


Figure 9.19: Case Field Auto Complete Dropdown

ii. Click at the button to open a new popup containing the list of all Cases. (Click at the Case ID hyperlink to select the Case)



Date	Case	Type	Source	Customer	Company	Priority	Due Date	Time Remaining	Status	Assigned To
11/11/2011 10:59:39 AM	CRD20111111-157	Complaint	Email	Brandon Chang	Netster MSC Sdn Bhd	High	11/11/2011 02:55:46 PM	-2 Day(s) 20 Hour(s)	Open - New	Kenix Yip
11/11/2011 10:56:48 AM	CRD20111111-156	Compliment	Call	Ho Joo Tan	Netster MSC Sdn Bhd	High	11/11/2011 02:42:08 PM	-2 Day(s) 21 Hour(s)	Open - New	Kenix Yip
11/03/2011 05:29:10 PM	CRD20111103-155	Comment	Email		Netster MSC Sdn Bhd	High	11/04/2011 01:29:00 PM	-9 Day(s) 22 Hour(s)	Open - New	Kha Chun Fong
10/19/2011 10:37:37 AM	CRD20111019-154	Comment	Web	Brandon Chang	Netster MSC Sdn Bhd	High	10/19/2011 02:37:37 PM	-25 Day(s) 21 Hour(s)	Closed - Dup	
10/18/2011 12:40:49 PM	CRD20111018-153	Compliment	Email		Netster MSC Sdn Bhd (Kuala Lump	High	10/18/2011 05:00:00 PM	-26 Day(s) 18 Hour(s)	Open - New	Kenix Yip
10/18/2011 11:49:31 AM	CRD20111018-152	Complaint	Web			High	10/18/2011 03:49:31 PM	-26 Day(s) 19 Hour(s)	Open - New	Kenix Yip
10/18/2011 11:44:19 AM	CRD20111018-151	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:42:44 AM	CRD20111018-150	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:36:14 AM	CRD20111018-149	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:31:53 AM	CRD20111018-148	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:27:32 AM	CRD20111018-147	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:25:42 AM	CRD20111018-146	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:23:18 AM	CRD20111018-145	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:22:56 AM	CRD20111018-144	Complaint	Web				01/01/1900 12:00:00 AM			
10/10/2011 09:44:18 PM	CRD20111010-142						01/01/1900 12:00:00 AM			

Figure 9.20: Case Popup

- **Type** field is the type of the Issue; Options will be **Comment**, **Complaint**, **Compliment**, **Enquiry**, **Suggestion**, **Support** or **Other**.
- **Subject** field is the subject name of the issue.
- **Status** field is the status of the Issue created; Options available are: **New**, **Assigned**, **Closed**, **Closed**, **Pending Input**, **Closed – Rejected** or **Closed – Duplicate**.
- **Priority** field is the priority of the Issue created; Options available are: **High**, **Medium** or **Low**.
- **Due Date** field when clicked will populate a calendar for user to select the date and time for the Issue. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Issue is created. Click at the Done menu to set the date and time.

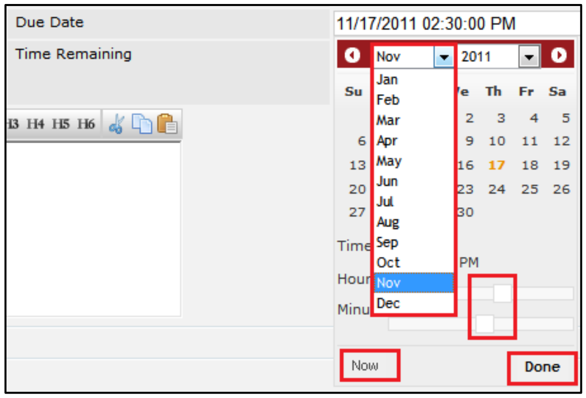


Figure 9.21: Due Date Time

- Once the Due Date is selected, **Time Remaining** field will auto-populate the remaining time (in day(s)) for the Issue.

2) **Root Cause Details**

- For user to enter the root cause details – Root Cause Category and Resolution.

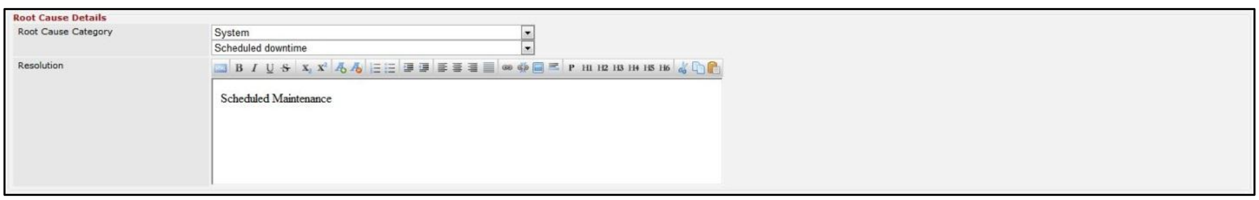


Figure 9.22: Edit Issue – Root Cause Details

To cancel editing Issue, click Cancel button and navigates back to the **Issue Management Detail** page.

Issue – Activities Subpanel

This subpanel contains any activities related to the contact. **Call**, **Meeting** or **Task** created will be displayed in this **Activities** subpanel.

Issue – Activities Subpanel (New Call)

To create a New Call related to an Issue, click at the New Call menu at **Activities** subpanel. Once New Call menu is clicked, a Call Management window will pop up for user to create a New Call. Enter the details of the Call and click Save button to create the New Call.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

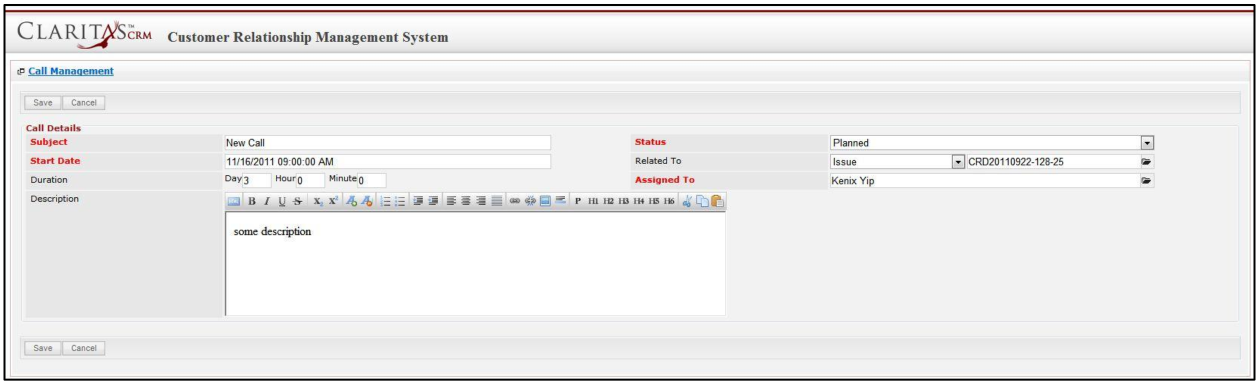


Figure 9.23: New Call Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Issue**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Call. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Call is created. Click at the Done menu to set the date and time.

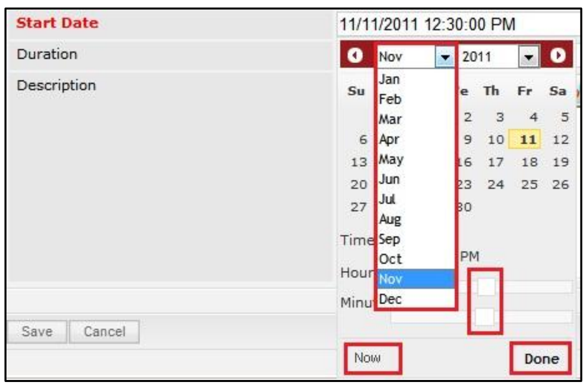


Figure 9.24: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Call for the related Issue. There are two ways of entering the Assigned To field:
    i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 9.25: Assigned To Field Auto Complete Dropdown

ii. Click at the button to open a new popup containing the list of all Users. (Click at the user’s First Name or Last Name hyperlink to select the user)

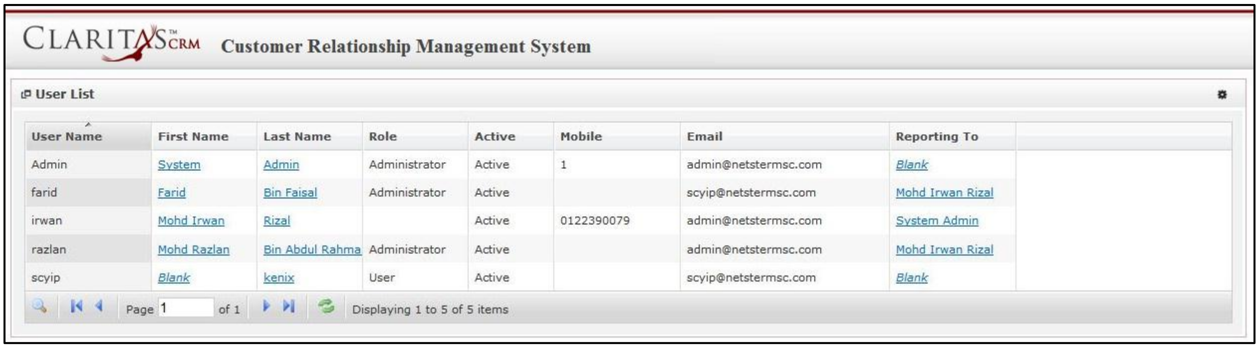


Figure 9.26: Assigned To Popup

- After a New Call is created, the subpanel will auto-refresh and display the newly-created Call.

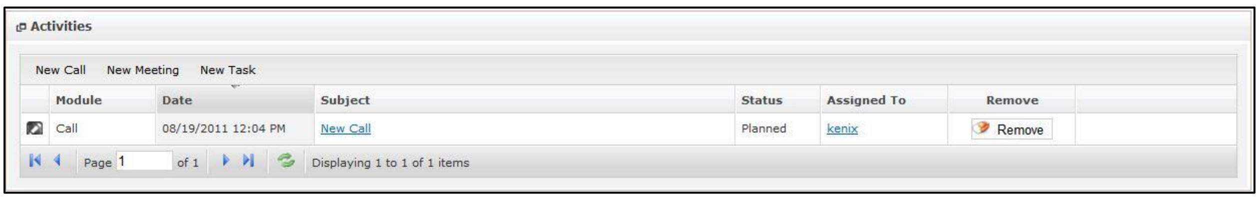


Figure 9.27: Activities Subpanel List New Call

To **cancel creating New Call**, click Cancel button. A confirmation dialog showing “Are you sure you want to close this window?” will prompt user to cancel creating New Call and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Call.

Issue – Activities Subpanel (New Meeting)

To create a New Meeting related to an Issue, click at the New Meeting menu at **Activities** subpanel. Once New Meeting menu is clicked, a Meeting Management window will pop up for user to create a New Meeting. Enter the details of the Meeting and click Save button to create the New Meeting.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

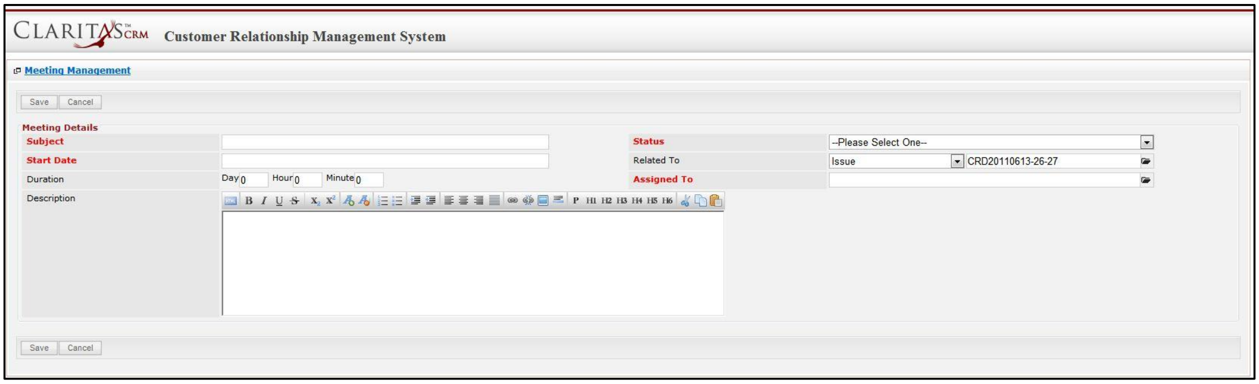


Figure 9.28: New Meeting Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Issue**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Meeting. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Meeting is created. Click at the Done menu to set the date and time.

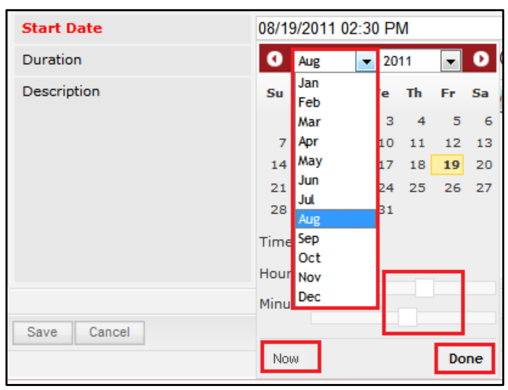
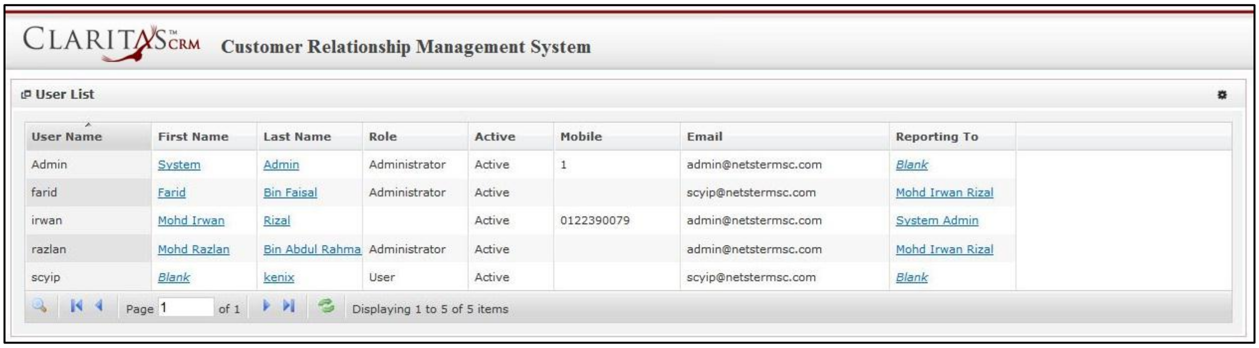


Figure 9.29: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Meeting for the related **Issue**. There are two ways of entering the **Assigned To** field:
    i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)
    OR

Figure 9.30: Assigned To Field Auto Complete Dropdown

ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)


CLARITAS CRM Customer Relationship Management System

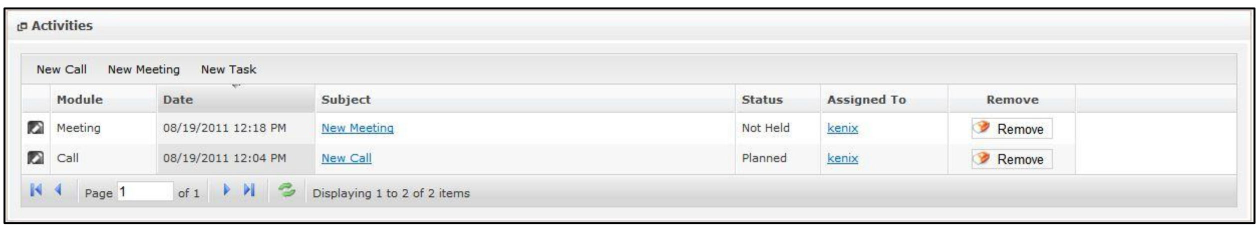
User List

User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 9.31: Assigned To Popup

- After a New Meeting is created, the subpanel will auto-refresh and display the newly-created Meeting.


Activities

New Call New Meeting New Task

Module	Date	Subject	Status	Assigned To	Remove
Meeting	08/19/2011 12:18 PM	New Meeting	Not Held	kenix	Remove
Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Page 1 of 1 Displaying 1 to 2 of 2 items

Figure 9.32: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Meeting and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Meeting.

Issue – Activities Subpanel (New Task)

To create a New Task related to an Issue, click at the New Task menu at **Activities** subpanel. Once New Task menu is clicked, a Task Management window will pop up for user to create a New Task. Enter the details of the Task and click Save button to create the New Task. Or click Cancel menu to cancel creating New Task.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

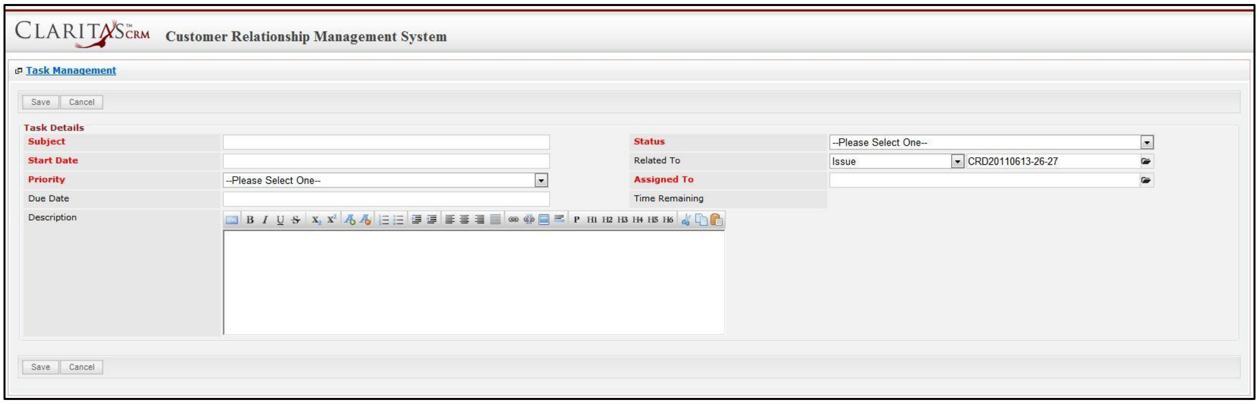


Figure 9.33: New Task Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Priority**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Issue**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Task. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Task is created. Click at the Done menu to set the date and time.

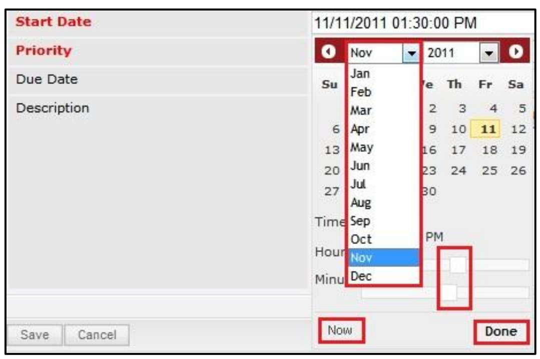
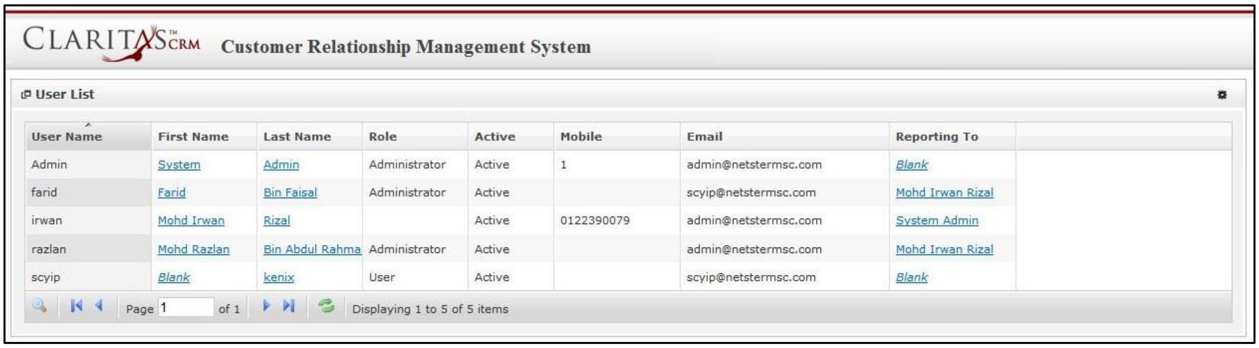


Figure 9.34: Start Date Time

- **Priority** field once selected will auto-populate the **Due Date** field and **Time Remaining** accordingly.
- There are five **Statuses** available for Task- **Not Started**, **In Progress**, **Completed**, **Pending Input**, and **Deferred.**
- **Assigned To** field is to assign a User to in charge of the Task for the related Issue. There are two ways of entering the Assigned To field:
  i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 9.35: Assigned To Field Auto Complete Dropdown

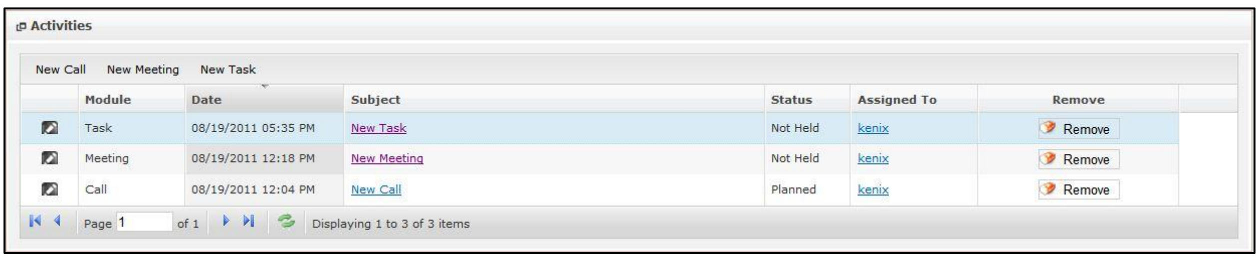
ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Figure 9.36: Assigned To Popup

- After a New Task is created, the subpanel will auto-refresh and display the newly-created Task.



Module	Date	Subject	Status	Assigned To	Remove
Task	08/19/2011 05:35 PM	New Task	Not Held	kenix	Remove
Meeting	08/19/2011 12:18 PM	New Meeting	Not Held	kenix	Remove
Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Figure 9.37: Activities Subpanel List New Task

To **cancel creating New Task**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Task and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Task.

Issue – History Subpanel

This subpanel contains any history or note related to the Issue.

Issue – History Subpanel (New Note)

To create a New Note related to an Issue, click at the New Note menu at **History** subpanel. Once New Note menu is clicked, a Note Management window will pop up for user to create a New Note.

Enter the details of the Note and click Save button to create the New Note.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

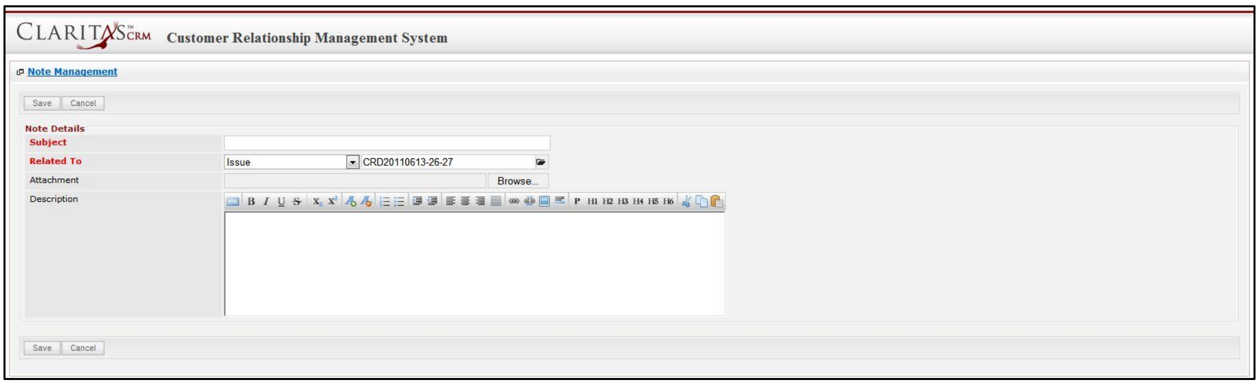
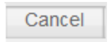
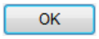
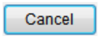


Figure 9.38: New Note Management Popup

- Compulsory fields: **Subject**, and **Related To**.
- **Related To** field will auto populate the name of the related **Issue**.
- **Attachment** field allow file extensions are as below (format that is not stated are not allowed to be uploaded):
  - **Documents:** .doc, .docx, .xls, .xlsx, . rtf, .txt, .pdf, .ppt, .pptx
  - **Pictures:** .jpg, .bmp, .png, .bmp, .gif
  - **Audio:** .mp3, .wma
  - **Video:** .3gp, .mp4, .rmvb, .avi, .flv
  - **Archive:** .zip, .rar
- After a New Task is created, the subpanel will auto-refresh and display the newly-created Note.

Figure 9.39: History Subpanel List New Task

To **cancel creating New Note**, click  button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Note and close the window. Click  button to **confirm**.

Clicking  button will **cancel** closing the window and user can proceed with creating the New Note.

Issue – Knowledge Base Subpanel

This subpanel contains any Knowledge Base related to the Issue Category.

The related Knowledge Base will only be displayed in this Knowledge Base Subpanel if the Issue Category matches the Knowledge Base.

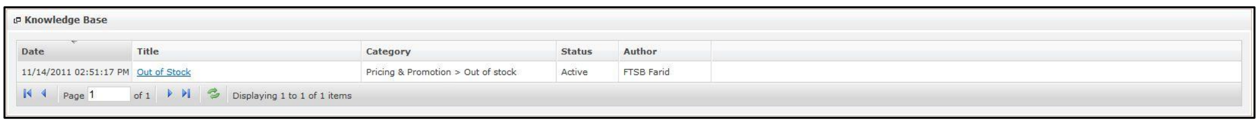


Figure 9.40: Knowledge Base Subpanel

10 Knowledge Base

This module is to **create and store Knowledge Base details**.

Knowledge Base Listing

To view Knowledge Base Listing, click at the **Support > Knowledge Base** menu at the Main Menu bar.

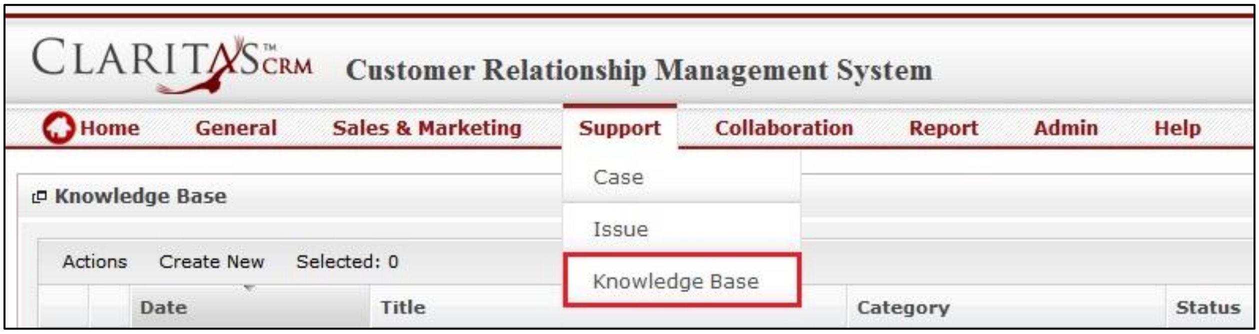
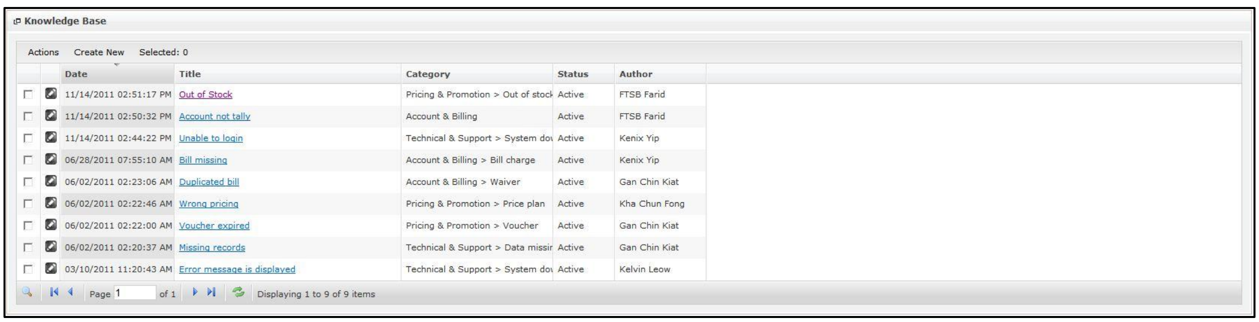


Figure 10.1: Knowledge Base Menu in Main Menu

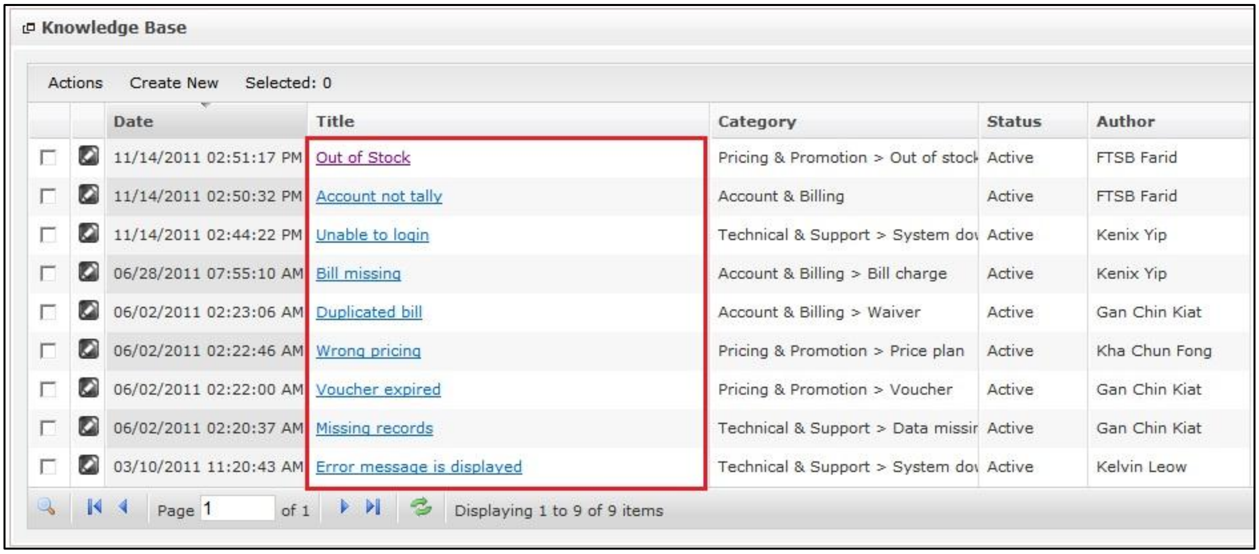
Page will load the list of the Knowledge Base available in the system.



Date	Title	Category	Status	Author
11/14/2011 02:51:17 PM	Out of Stock	Pricing & Promotion > Out of stock	Active	FTSB Farid
11/14/2011 02:50:32 PM	Account not tally	Account & Billing	Active	FTSB Farid
11/14/2011 02:44:22 PM	Unable to login	Technical & Support > System dov	Active	Kenix Yip
06/28/2011 07:55:10 AM	Bill missing	Account & Billing > Bill charge	Active	Kenix Yip
06/02/2011 02:23:06 AM	Duplicated bill	Account & Billing > Waiver	Active	Gan Chin Kiat
06/02/2011 02:22:46 AM	Wrong pricing	Pricing & Promotion > Price plan	Active	Kha Chun Fong
06/02/2011 02:22:00 AM	Voucher expired	Pricing & Promotion > Voucher	Active	Gan Chin Kiat
06/02/2011 02:20:37 AM	Missing records	Technical & Support > Data missir	Active	Gan Chin Kiat
03/10/2011 11:20:43 AM	Error message is displayed	Technical & Support > System dov	Active	Kelvin Leow

Figure 10.2: Knowledge Base Listing

To view the Knowledge Base Details, click at the Knowledge Base ID hyperlink in Knowledge Base column.



Knowledge Base

Actions | Create New | Selected: 0

		Date	Title	Category	Status	Author
☐		11/14/2011 02:51:17 PM	Out of Stock	Pricing & Promotion > Out of stock	Active	FTSB Farid
☐		11/14/2011 02:50:32 PM	Account not tally	Account & Billing	Active	FTSB Farid
☐		11/14/2011 02:44:22 PM	Unable to login	Technical & Support > System dow	Active	Kenix Yip
☐		06/28/2011 07:55:10 AM	Bill missing	Account & Billing > Bill charge	Active	Kenix Yip
☐		06/02/2011 02:23:06 AM	Duplicated bill	Account & Billing > Waiver	Active	Gan Chin Kiat
☐		06/02/2011 02:22:46 AM	Wrong pricing	Pricing & Promotion > Price plan	Active	Kha Chun Fong
☐		06/02/2011 02:22:00 AM	Voucher expired	Pricing & Promotion > Voucher	Active	Gan Chin Kiat
☐		06/02/2011 02:20:37 AM	Missing records	Technical & Support > Data missir	Active	Gan Chin Kiat
☐		03/10/2011 11:20:43 AM	Error message is displayed	Technical & Support > System dow	Active	Kelvin Leow

Page 1 of 1 Displaying 1 to 9 of 9 items

Figure 10.3: Knowledge Base ID Hyperlink

After clicking the <u>Knowledge Base ID</u> hyperlink, page will navigate to the **Knowledge Base Management Detail** page which displays all the details of the Knowledge Base include related **Activities** and **History**.

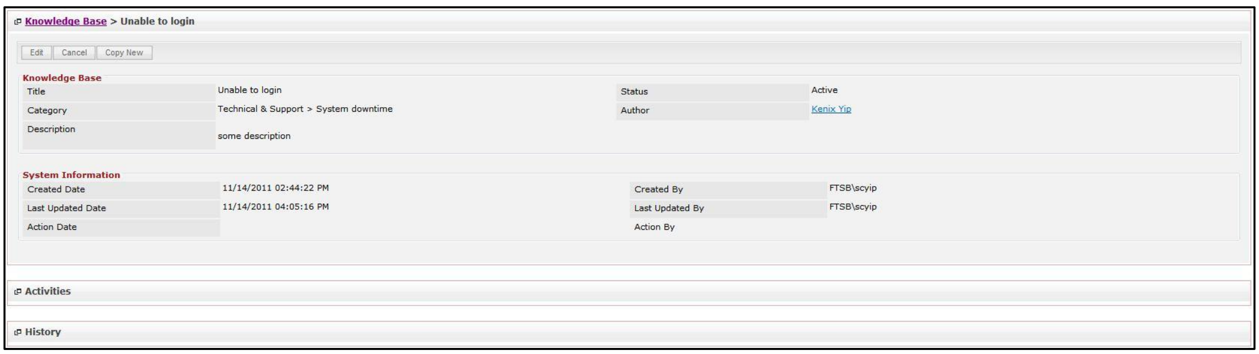


Figure 10.4: Knowledge Base Management Detail Page

To copy the entire record and save as a new record, click Copy New button at **User Maintenance Detail** page.

To create a new Knowledge Base, click at Create New menu at the top of the Knowledge Base Listing.

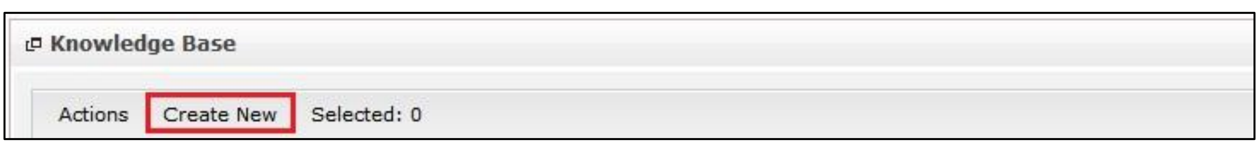


Figure 10.5: Create New Knowledge Base Menu

After clicking Create New menu, page will navigate to **Knowledge Base Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Knowledge Base**

Management Detail page or click Cancel button to cancel creating and navigates back to the **Knowledge Base Listing** page.

***Related Topics**: See "[Create New Knowledge Base]"*

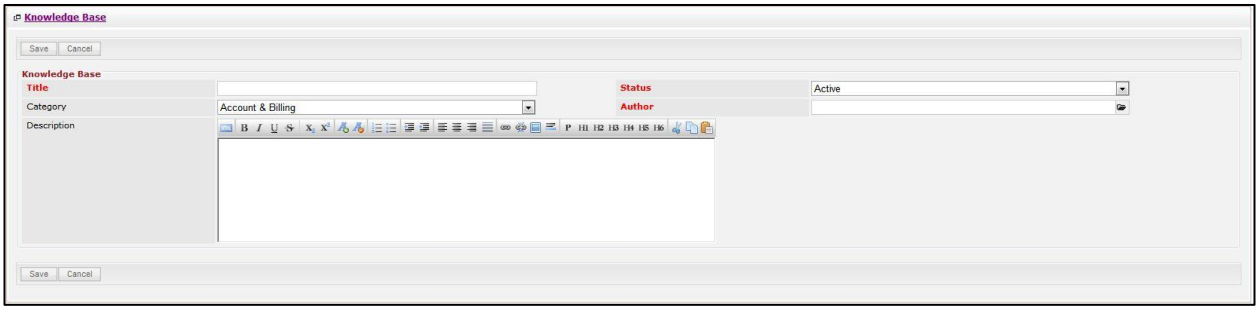


Figure 10.6: Knowledge Base Management Create New Page

To **delete** a Knowledge Base, select the record and click **Actions > Delete**.

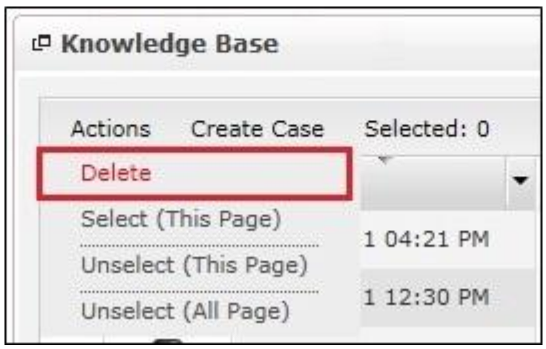


Figure 10.7: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 10.8: Message Showing Knowledge Base Deleted Successfully

Deleted Knowledge Base will **no longer** be displayed in Knowledge Base Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

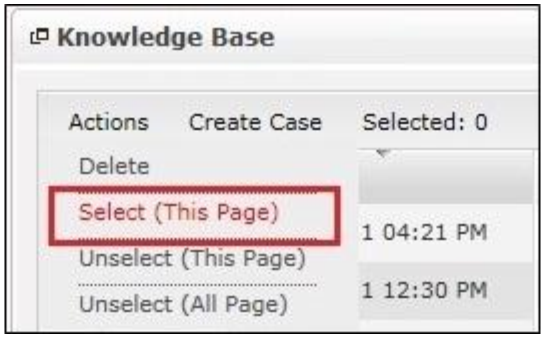


Figure 10.9: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

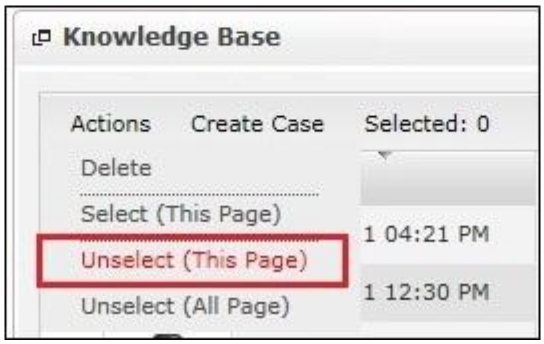


Figure 10.10: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

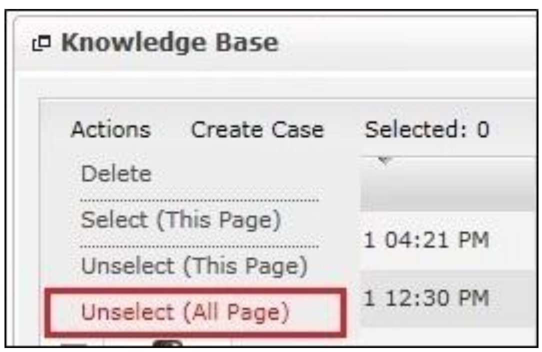


Figure 10.11: Actions > Unselect (All Pages) Menu

To go to the First Page of the listing, click at the **First Page**  button.

To go to the Previous Page of the listing, click at the **Previous Page**  button.

To go to the Next Page of the listing, click at the **Next Page**  button.

To go to the Last Page of the listing, click at the **Last Page**  button.

To refresh the listing page, click at the **Refresh**  button.

To edit the details of the Knowledge Base, click at the **Edit** button or click the Edit button in **Knowledge Base Management Detail** page. After clicking at the **Edit** button page will navigate to the **Knowledge Base Management Edit** page.

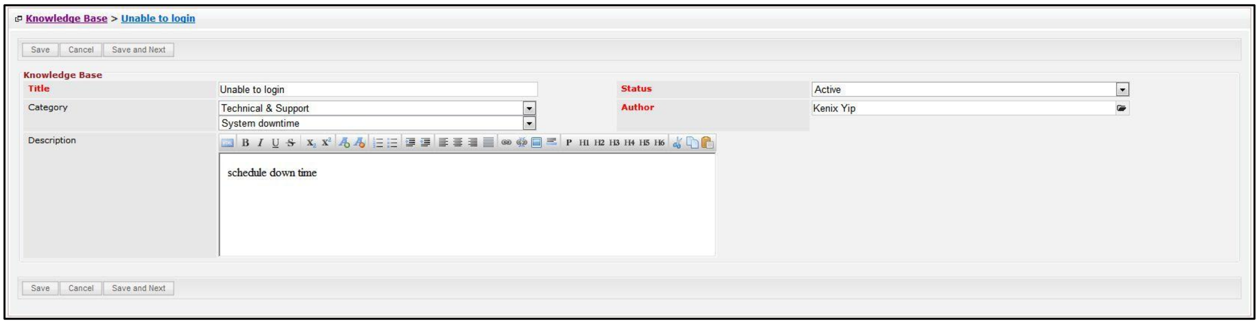


Figure 10.12: Knowledge Base Management Edit Page

Edit the relevant details and click Save button to save the changes and navigates back to **Knowledge Base Management Detail** page or click Save and Next button to save the changes and navigates to the **Knowledge Base Management Edit** page of the next Knowledge Base. Or click Cancel button to cancel editing and navigates back to the **Knowledge Base Management Detail** page.

***Related Topics**: See "Edit Knowledge Base"*

Create New Knowledge Base

To create new Knowledge Base, click at the **Support > Knowledge Base** menu at the Main Menu bar. Then click the Create New menu at the top of the **Knowledge Base Listing**. After clicking Create New menu, page will navigate to **Knowledge Base Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Knowledge Base Management Detail** page.

There is only **one** main section to be filled in to create a new Knowledge Base: **Knowledge Base.**

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Knowledge Base**

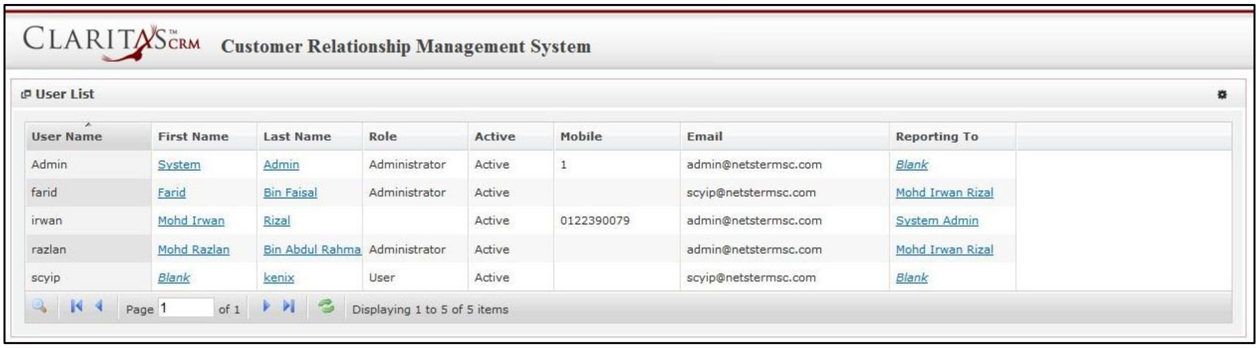
- Compulsory fields: **Title**, **Status** and **Author**.

Figure 10.13: Create Knowledge Base - Knowledge Base

- **Title** field will be the Knowledge Base Title for identification.
- **Status** field is the status of the Knowledge Base created; Options available are: **Active** or **Inactive**.
- **Author** field is to associate the Knowledge Base to the related Author. There are two ways of entering the **Author** field:
    i. Type in the Author (User) name and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the Author) **OR**

Figure 10.14: Author Field Auto Complete Dropdown

    ii. Click at the button to open a new popup containing the list of all Users. (Click at the User hyperlink to select the Author)



User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Figure 10.15: Author Popup

- **Type** field is the type of the Knowledge Base; Options will be **Comment**, **Complaint**, **Compliment**, **Enquiry**, **Suggestion**, **Support** or **Other**.
- **Subject** field is the subject name of the Knowledge Base.

To cancel creating New Knowledge Base, click Cancel button and navigates back to the **Knowledge Base Listing** page.

Edit Knowledge Base

To edit the details of the Knowledge Base, click at the **Edit** button or click the Edit button in **Knowledge Base Management Detail** page. After clicking the **Edit** button or Edit button, page will navigate to the **Knowledge Base Management Edit** page. Edit the relevant details and click Save button to save the changes and navigates back to **Knowledge Base Management Detail** page or click Save and Next button to save the changes and navigates to the **Knowledge Base Management Edit page** for the next record.

There is only **one** main section of Knowledge Base to be edited: **Knowledge Base.**

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Knowledge Base**

- Compulsory fields: **Title**, **Status** and **Author**.

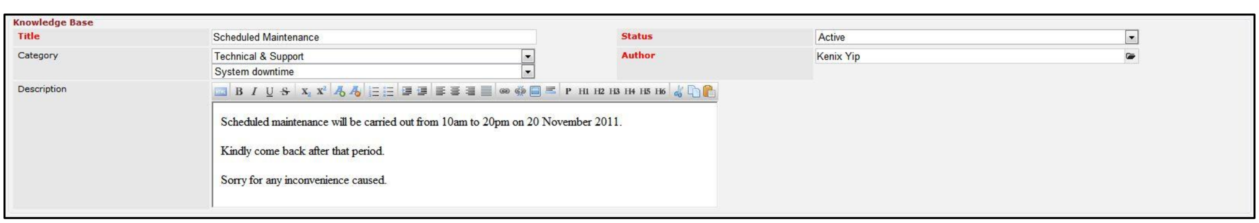
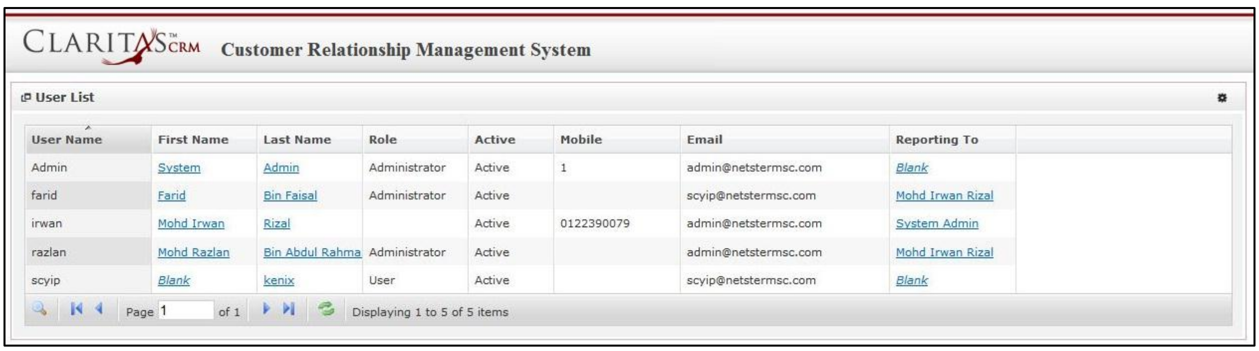


Figure 10.16: Edit Knowledge Base - Knowledge Base

- **Title** field will be the Knowledge Base Name for identification.
- **Status** field is the status of the Knowledge Base created; Options available are: **Active** or **Inactive**.
- **Author** field is to associate the Knowledge Base to the related Author. There are two ways of entering the **Author** field:
    i. Type in the Author (User) name and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the Author) **OR**

Figure 10.17: Author Field Auto Complete Dropdown

    ii. Click at the button to open a new popup containing the list of all Users. (Click at the User hyperlink to select the Author)



User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 10.18: Author Popup

To cancel editing Knowledge Base, click Cancel button and navigates back to the **Knowledge Base Management Detail** page.

Knowledge Base – Activities Subpanel

This subpanel contains any activities related to the contact. **Call**, **Meeting** or **Task** created will be displayed in this **Activities** subpanel.

Knowledge Base – Activities Subpanel (New Call)

To create a New Call related to a Knowledge Base, click at the New Call menu at **Activities** subpanel.

Once New Call menu is clicked, a Call Management window will pop up for user to create a New Call.

Enter the details of the Call and click Save button to create the New Call.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

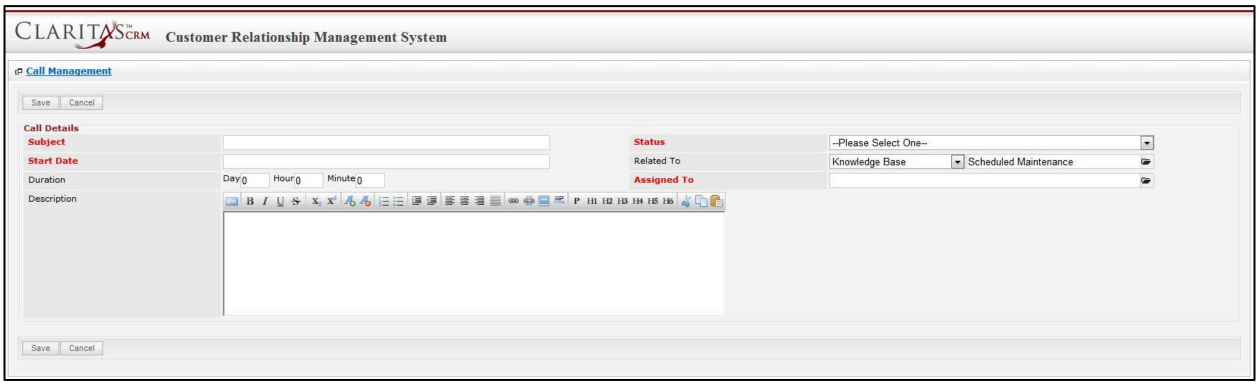


Figure 10.19: New Call Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Knowledge Base**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Call. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Call is created. Click at the Done menu to set the date and time.

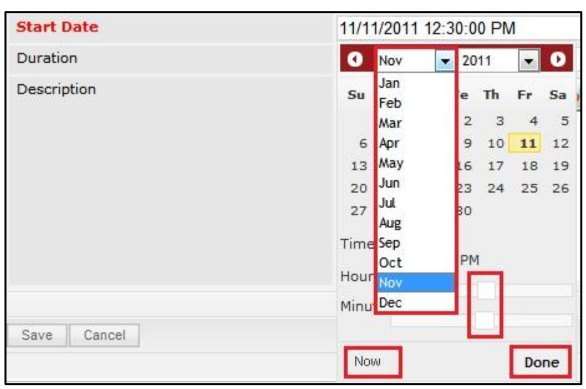


Figure 10.20: Start Date Time

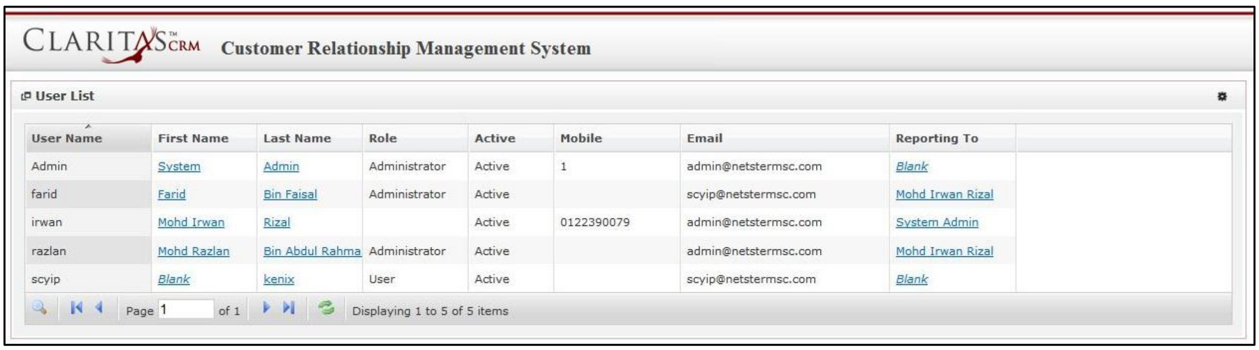
- **Assigned To** field is to assign a User to in charge of the Call for the related Knowledge Base. There are two ways of entering the Assigned To field:
    i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available

users; the textbox will be auto-cleared. (Click at the User name to select the user)

OR

Figure 10.21: Assigned To Field Auto Complete Dropdown

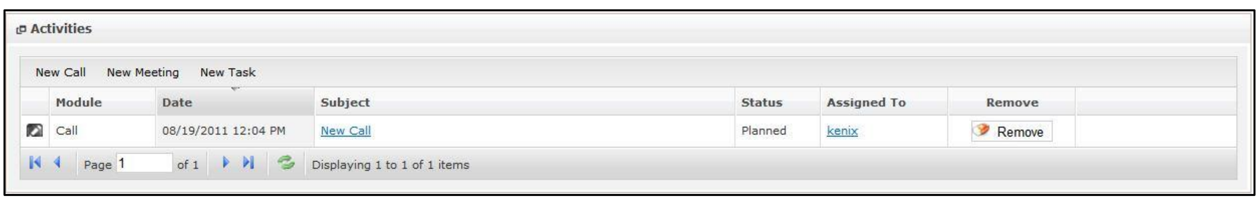
ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Figure 10.22: Assigned To Popup

- After a New Call is created, the subpanel will auto-refresh and display the newly-created Call.



Module	Date	Subject	Status	Assigned To	Remove
Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Figure 10.23: Activities Subpanel List New Call

To **cancel creating New Call**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Call and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Call.

Knowledge Base – Activities Subpanel (New Meeting)

To create a New Meeting related to a Knowledge Base, click at the New Meeting menu at **Activities** subpanel. Once New Meeting menu is clicked, a Meeting Management window will pop up for user to create a New Meeting. Enter the details of the Meeting and click Save button to create the New Meeting.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

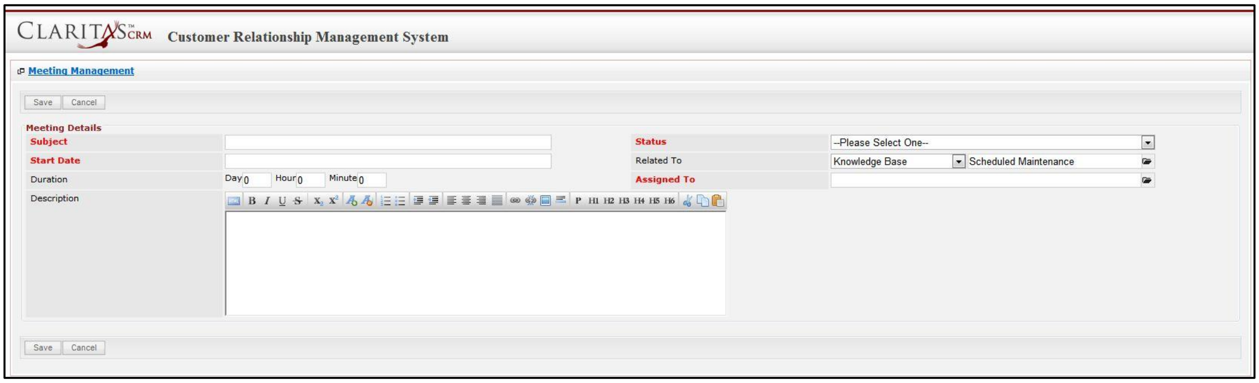


Figure 10.24: New Meeting Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Knowledge Base**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Meeting. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Meeting is created. Click at the Done menu to set the date and time.

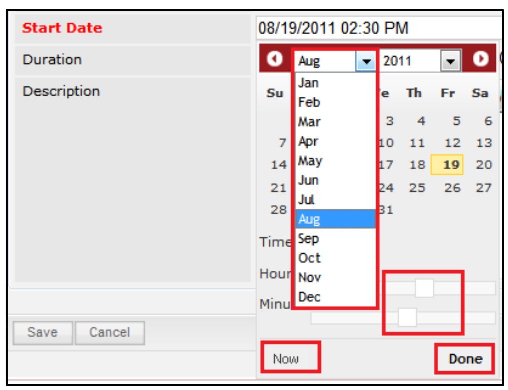


Figure 10.25: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Meeting for the related **Knowledge Base**. There are two ways of entering the **Assigned To** field:

i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)

OR

Figure 10.26: Assigned To Field Auto Complete Dropdown

ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

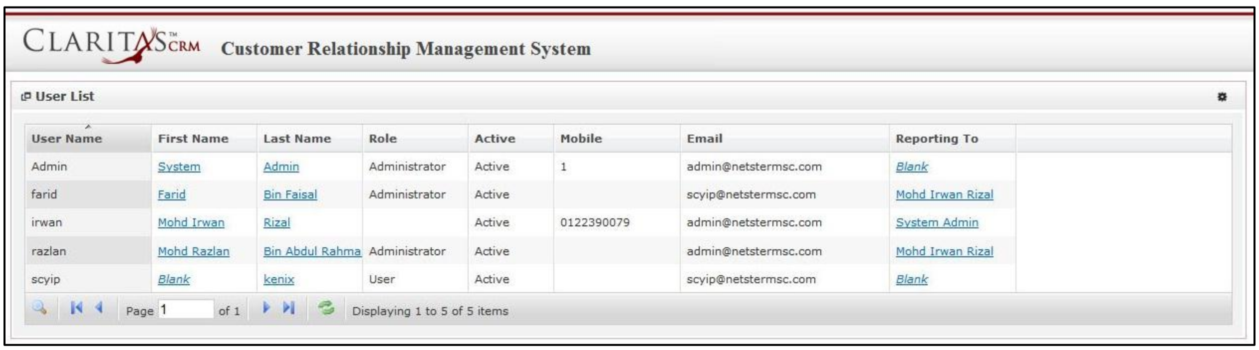


Figure 10.27: Assigned To Popup

- After a New Meeting is created, the subpanel will auto-refresh and display the newly-created Meeting.

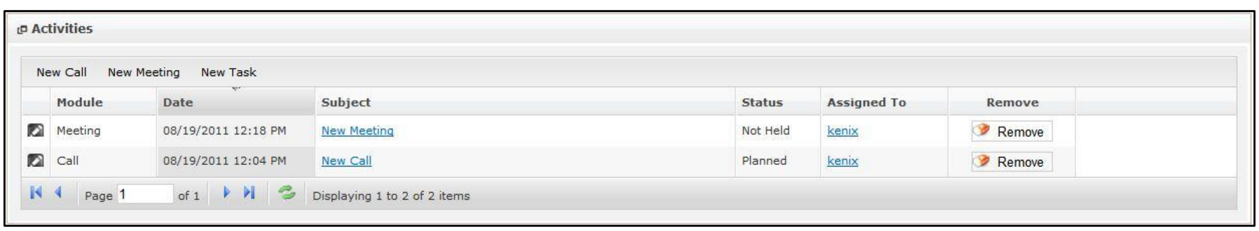


Figure 10.28: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Meeting and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Meeting.

Knowledge Base – Activities Subpanel (New Task)

To create a New Task related to a Knowledge Base, click at the New Task menu at **Activities** subpanel. Once New Task menu is clicked, a Task Management window will pop up for user to create a New Task. Enter the details of the Task and click Save button to create the New Task. Or click Cancel menu to cancel creating New Task.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

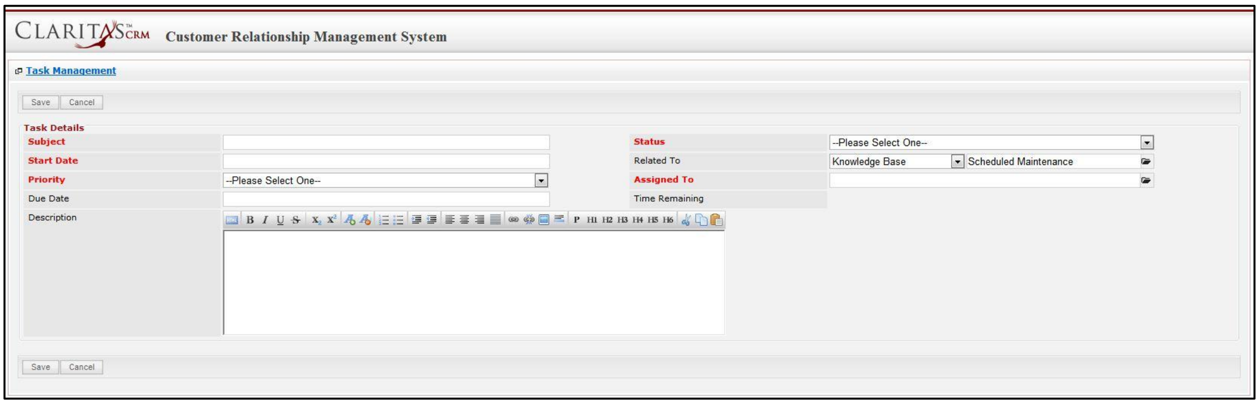


Figure 10.29: New Task Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Priority**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **Knowledge Base**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Task. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Task is created. Click at the Done menu to set the date and time.

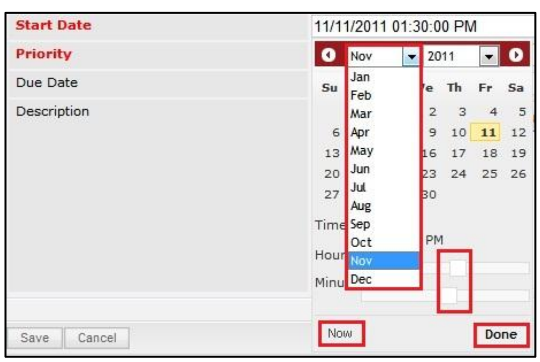


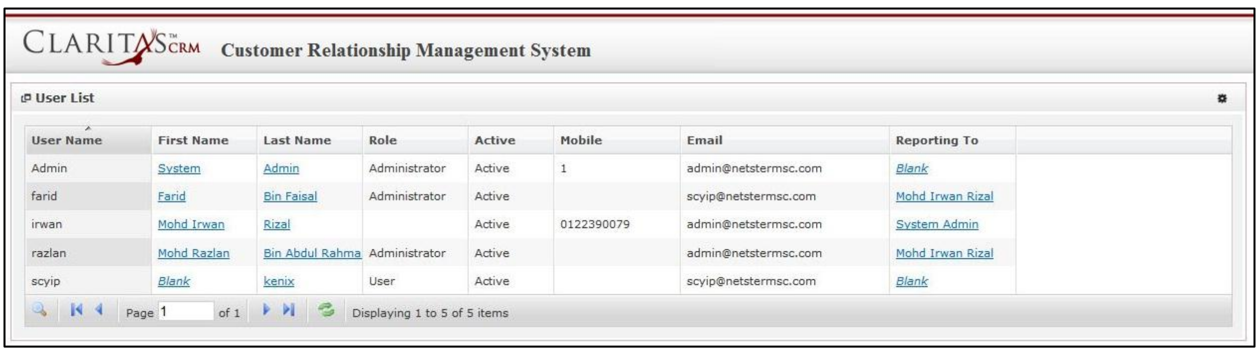
Figure 10.30: Start Date Time

- **Priority** field once selected will auto-populate the **Due Date** field and **Time Remaining** accordingly.

- There are five **Statuses** available for Task- **Not Started**, **In Progress**, **Completed**, **Pending Input**, and **Deferred.**
- **Assigned To** field is to assign a User to in charge of the Task for the related Knowledge Base. There are two ways of entering the Assigned To field:
  i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 10.31: Assigned To Field Auto Complete Dropdown

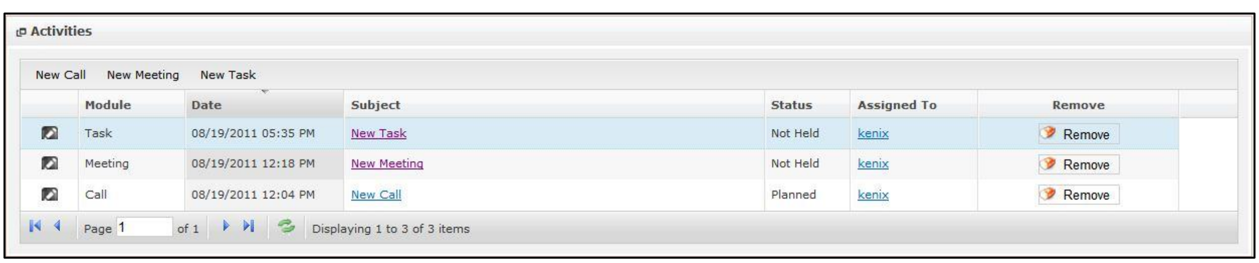
  ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Figure 10.32: Assigned To Popup

- After a New Task is created, the subpanel will auto-refresh and display the newly-created Task.



Module	Date	Subject	Status	Assigned To	Remove
Task	08/19/2011 05:35 PM	New Task	Not Held	kenix	Remove
Meeting	08/19/2011 12:18 PM	New Meeting	Not Held	kenix	Remove
Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Figure 10.33: Activities Subpanel List New Task

To **cancel creating New Task**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Task and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Task.

Knowledge Base – History Subpanel

This subpanel contains any history or note related to the Knowledge Base.

Knowledge Base – History Subpanel (New Note)

To create a New Note related to a Knowledge Base, click at the New Note menu at **History** subpanel. Once New Note menu is clicked, a Note Management window will pop up for user to create a New Note. Enter the details of the Note and click Save button to create the New Note.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

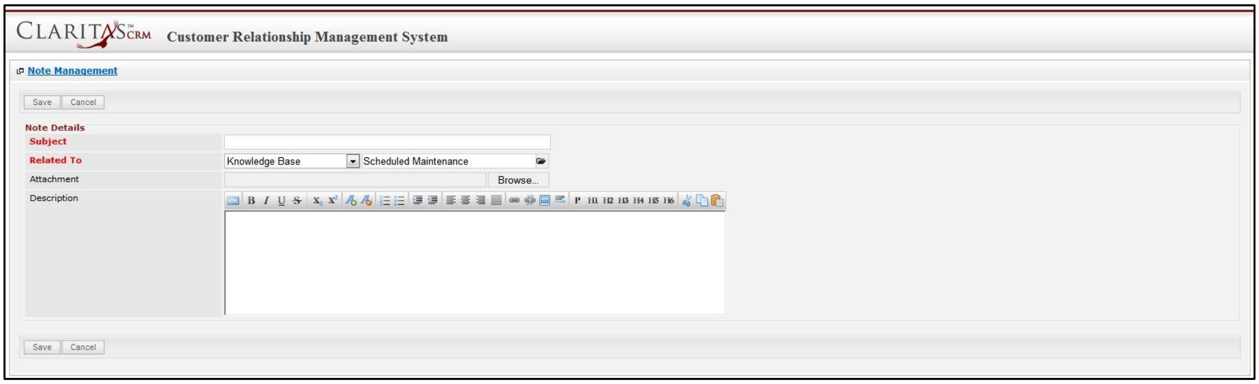


Figure 10.34: New Note Management Popup

- Compulsory fields: **Subject**, and **Related To**.
- **Related To** field will auto populate the name of the related **Knowledge Base**.
- **Attachment** field allow file extensions are as below (format that is not stated are not allowed to be uploaded):
    - **Documents:** .doc, .docx, .xls, .xlsx, . rtf, .txt, .pdf, .ppt, .pptx
    - **Pictures:** .jpg, .bmp, .png, .bmp, .gif
    - **Audio:** .mp3, .wma
    - **Video:** .3gp, .mp4, .rmvb, .avi, .flv
    - **Archive:** .zip, .rar
- After a New Task is created, the subpanel will auto-refresh and display the newly-created Note.

Figure 10.35: History Subpanel List New Task

To **cancel creating New Note**, click Cancel button. A confirmation dialog showing “Are you sure you want to close this window?” will prompt user to cancel creating New Note and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Note.

11 Collaboration – Meeting

This module is to **create and store Meeting details**.

Meeting Listing

To view Meeting Listing, click at the **Collaboration > Meeting** menu at the Main Menu bar.

Figure 11.1: Meeting Menu in Main Menu

Page will load the list of the Meeting available in the system.

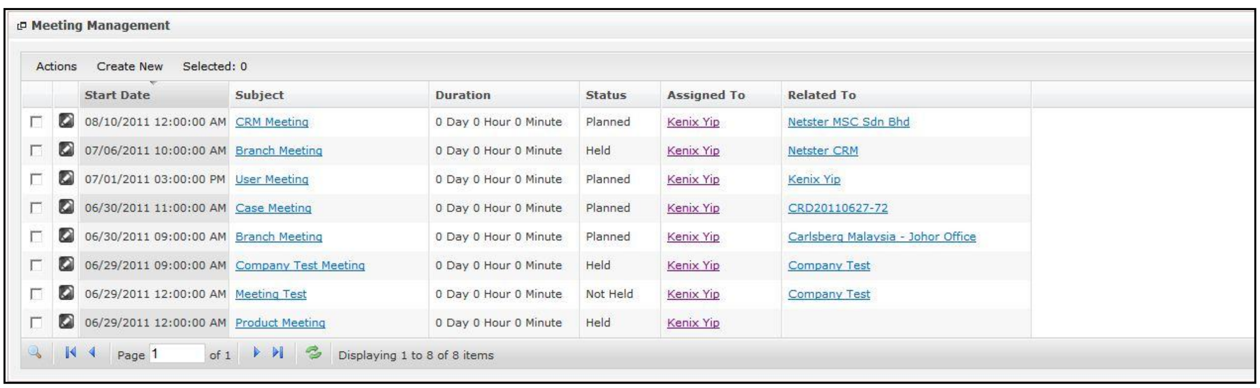


Figure 11.2: Meeting Listing

To view the Meeting Details, click at the Subject hyperlink in Subject column.

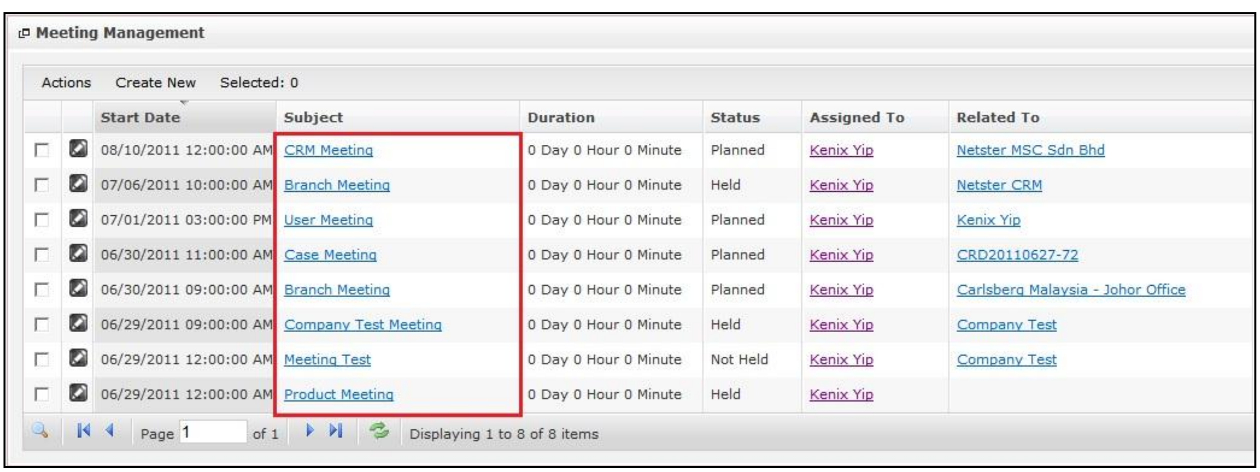


Figure 11.3: Subject Hyperlink

After clicking the Subject hyperlink, page will navigate to the **Meeting Management Detail** page which displays all the details of the Meeting.

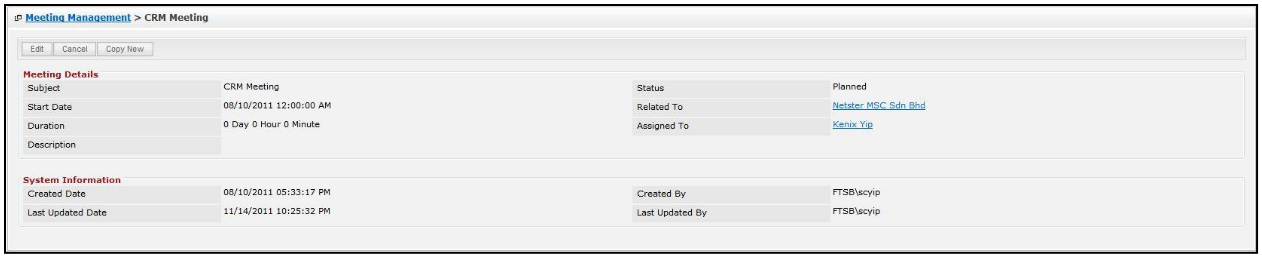


Figure 11.4: Meeting Management Detail Page

To copy the entire record and save as a new record, click Copy New button at **Meeting Maintenance Detail** page.

To create a new meeting, click at Create New menu at the top of the Meeting Listing.

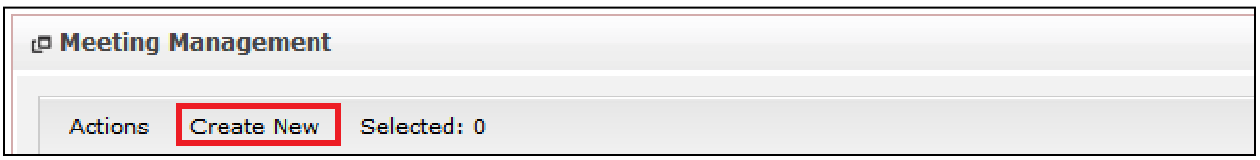


Figure 11.5: Create New Meeting Menu

After clicking Create New menu, page will navigate to **Meeting Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Meeting Management Detail** page or click Cancel button to cancel creating and navigates back to the **Meeting Listing** page.

***Related Topics**: See "Create New Meeting"*

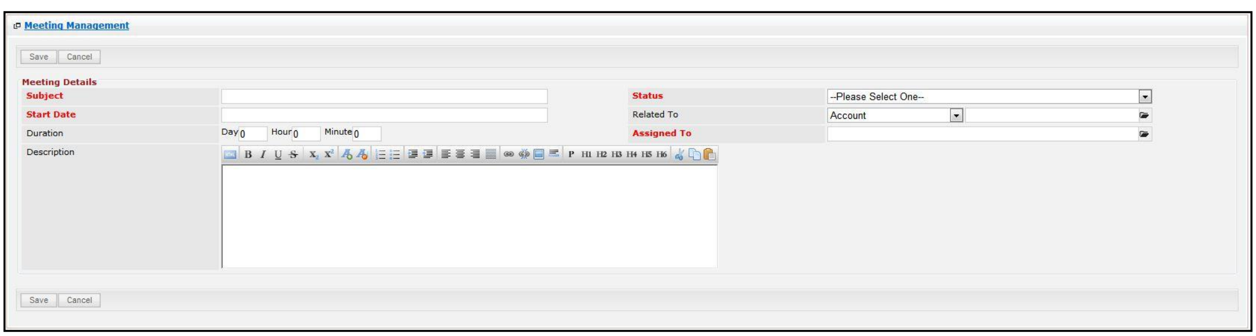


Figure 11.6: Meeting Management Create New Page

To **delete** a meeting, select the record and click **Actions > Delete**.

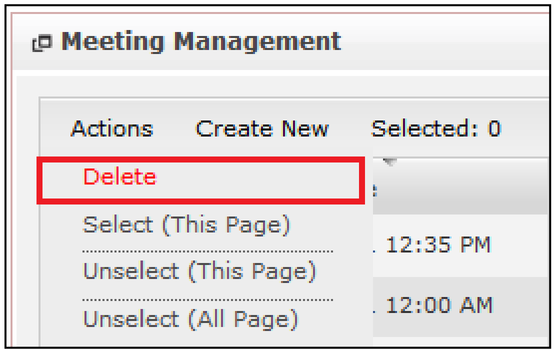


Figure 11.7: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 11.8: Message Showing Meeting Deleted Successfully

Deleted meeting will **no longer** be displayed in Meeting Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

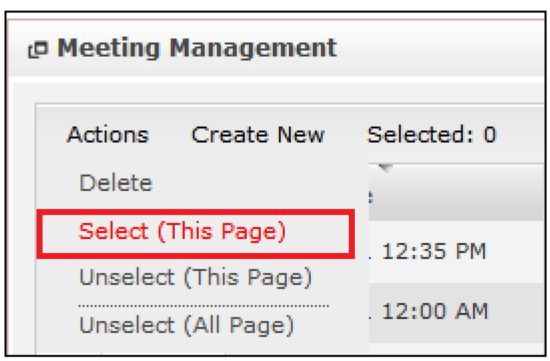


Figure 11.9: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

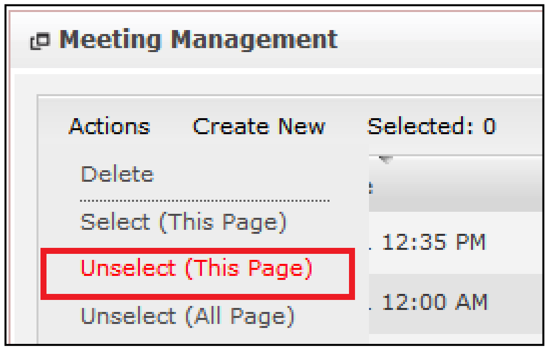


Figure 11.10: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

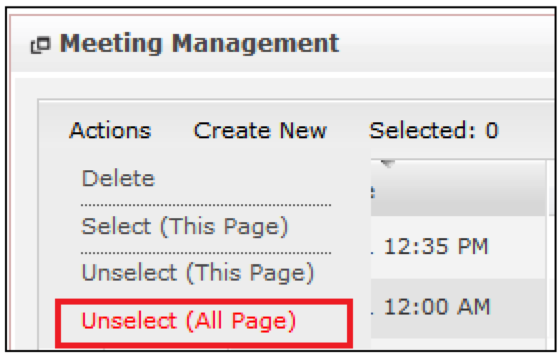


Figure 11.11: Actions > Unselect (All Pages) Menu

To go to the First Page of the listing, click at the **First Page** button.

To go to the Previous Page of the listing, click at the **Previous Page** button.

To go to the Next Page of the listing, click at the **Next Page** button.

To go to the Last Page of the listing, click at the **Last Page** button.

To refresh the listing page, click at the **Refresh** button.

To search for record/s, click at the **Search** button. An **Advance Search** section will expand at the bottom of the listing for user to select the search field and enter search value.

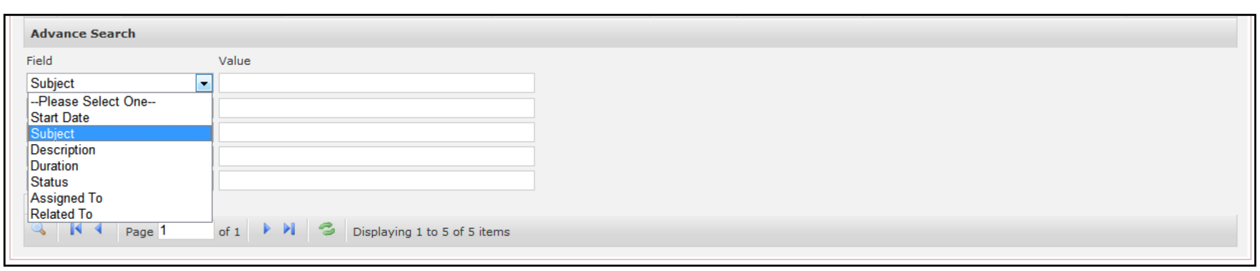


Figure 11.12: Meeting Advance Search

To edit the details of the Meeting, click at the **Edit** button or click the Edit button in **Meeting Management Detail** page. After clicking at the **Edit** button page will navigate to the **Meeting Management Edit** page.

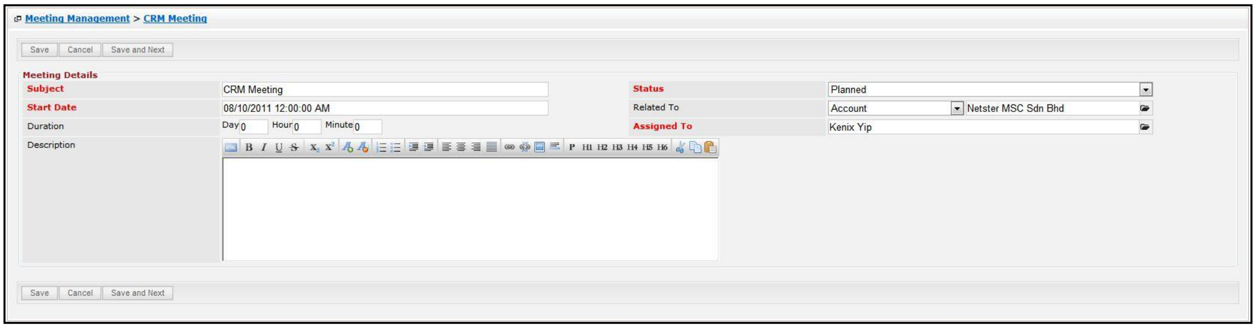


Figure 11.13: Meeting Management Edit Page

Edit the relevant details and click Save button to save the changes and navigates back to **Meeting Management Detail** page. Or click Cancel button to cancel editing and navigates back to the **Meeting Management Detail** page.

***Related Topics**: See "Edit Meeting"*

Create New Meeting

To create new meeting, click at the **Collaboration > Meeting** menu at the Main Menu bar. Then click the Create New menu at the top of the **Meeting Listing**. After clicking Create New menu, page will navigate to **Meeting Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Meeting Management Detail** page.

There is only **one** main section to be filled in to create a new Meeting: **Meeting Details**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

10) **Meeting Details**

- Compulsory fields: **Subject**, **Start Date**, **Status** and **Assigned To**.

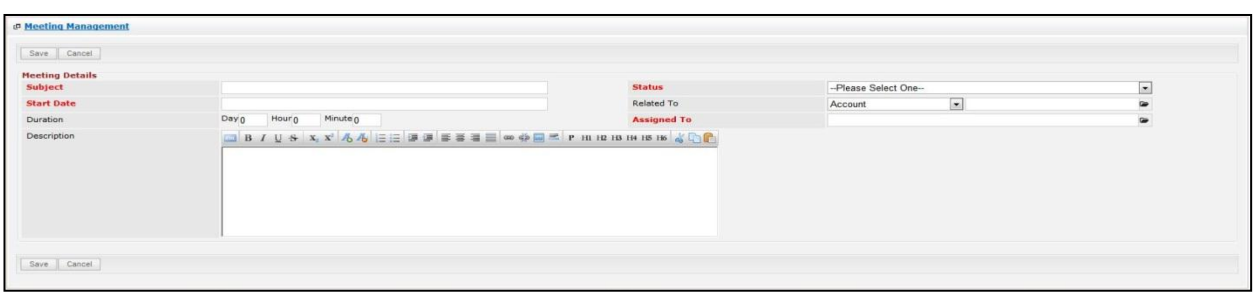


Figure 11.14: Create New Meeting – Meeting Details

- **Subject** field will be the Meeting Name for identification.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Meeting. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Meeting is created. Click at the Done menu to set the date and time.

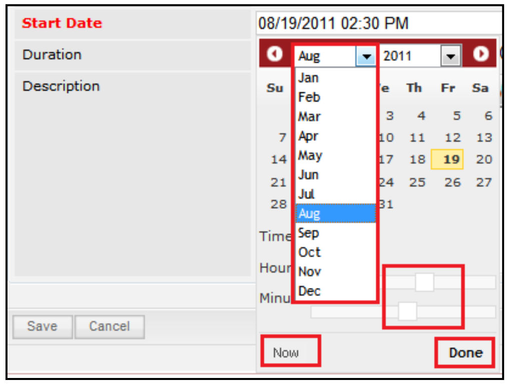


Figure 11.15: Start Date Time

- **Status** field is the status of the Campaign created; Options available are: **Planned**, **Held** or **Not Held**.
- **Assigned To** field is to assign a User to in charge of the Meeting for the related Contact. There are two ways of entering the **Assigned To** field:

    vii. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 11.16: Assigned To Field Auto Complete Dropdown

    viii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

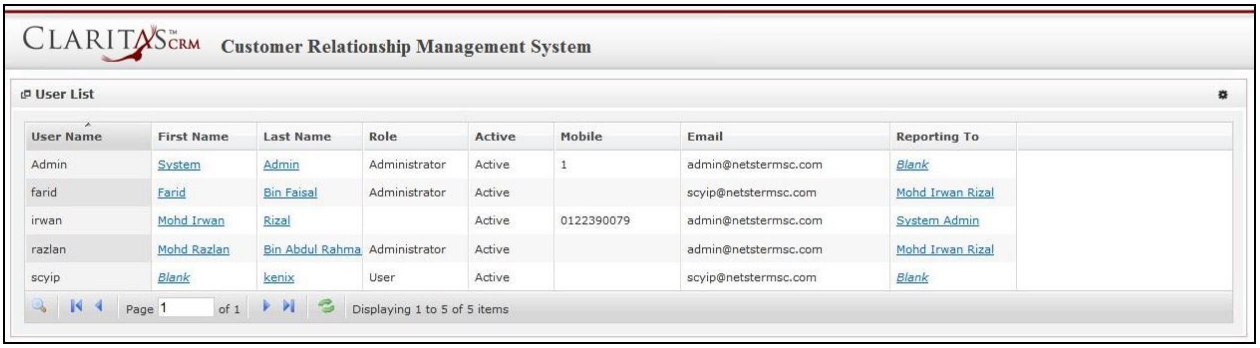


Figure 11.17: Assigned To Popup

To **cancel creating New Meeting**, click Cancel button. Page will navigate back to **Meeting Listing** page.

Edit Meeting

To edit meeting details, click at the **Collaboration > Meeting** menu at the Main Menu bar. Click at the **Edit** button in **Meeting Listing** page or click at the Subject hyperlink in **Meeting Listing** page then click the Edit button in **Meeting Management Detail** page. After clicking the **Edit** button or Edit button, page will navigate to **Meeting Management** page. Edit the relevant details and click Save button to save the changes and navigates back to **Meeting Management Detail** page or click Save and Next button to save the changes and navigates to the **Meeting Management Edit page** for the next record.

There is only **one** main section of Meetings to be edited: **Meeting Details**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Meeting Details**

- Compulsory fields: **Subject**, **Start Date**, **Status** and **Assigned To**.

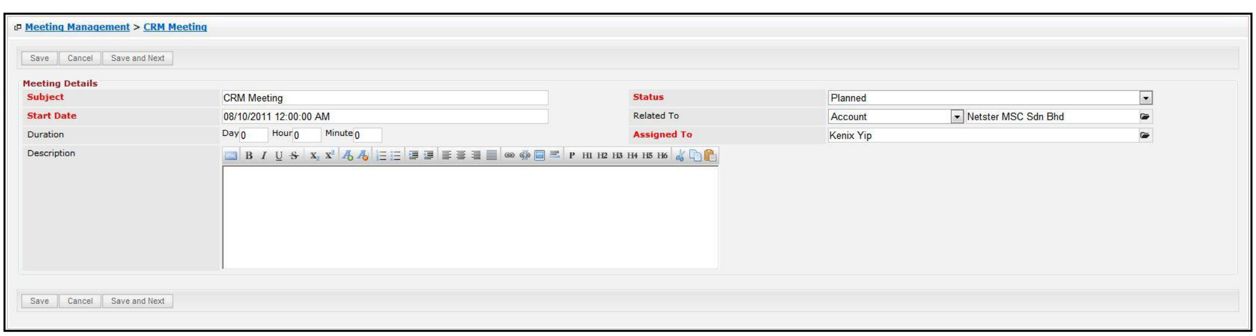


Figure 11.18: Edit Meeting – Meeting Details

- **Subject** field will be the Meeting Name for identification.

- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Meeting. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Meeting is created. Click at the Done menu to set the date and time.

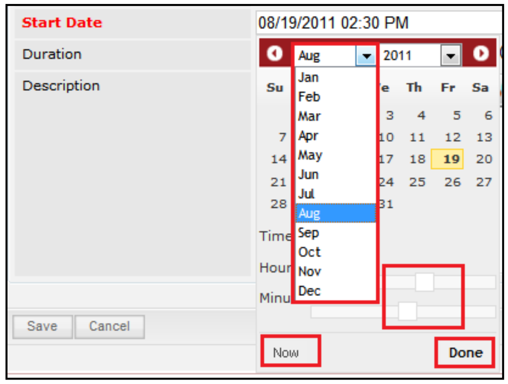
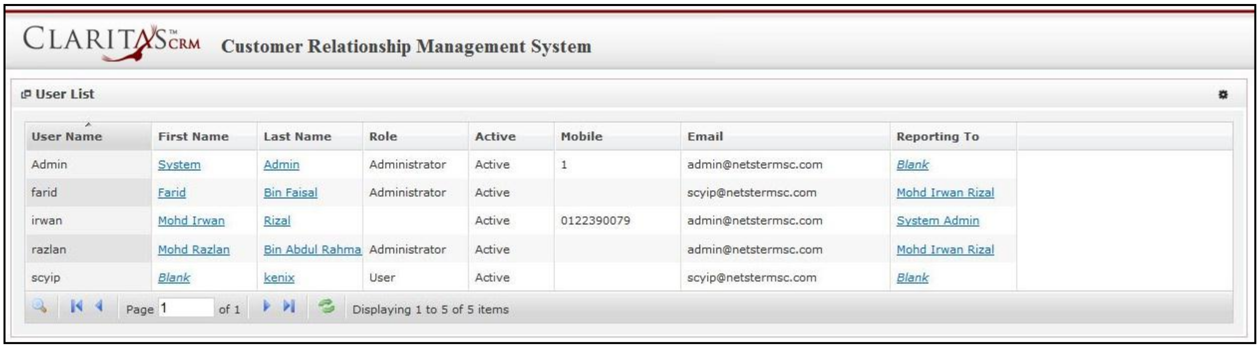


Figure 11.19: Start Date Time

- **Status** field is the status of the Campaign created; Options available are: **Planned**, **Held** or **Not Held**.
- **Assigned To** field is to assign a User to in charge of the Meeting for the related Contact. There are two ways of entering the **Assigned To** field:
    i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)
    OR

Figure 11.20: Assigned To Field Auto Complete Dropdown

    ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



CLARITAS CRM Customer Relationship Management System

User List

User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 11.21: Assigned To Popup

To **cancel editing New Meeting**, click Cancel button at **Meeting Management Detail** page. Page will navigate back to **Meeting Listing** page.

12 Collaboration – Call

This module is to **create and store Call details**.

Call Listing

To view Call Listing, click at the **Collaboration > Call** menu at the Main Menu bar.

Figure 12.1: Call Menu in Main Menu

Page will load the list of the Call available in the system.

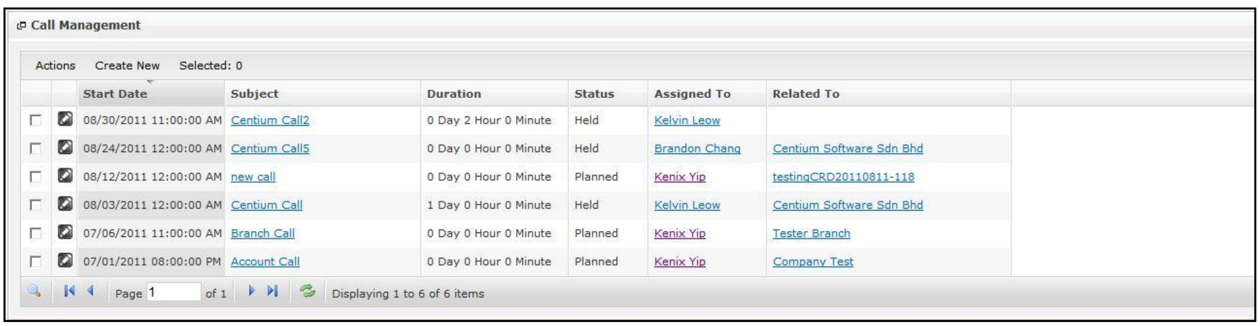


Figure 12.2: Call Listing

To view the Call Details, click at the Subject hyperlink in Subject column.

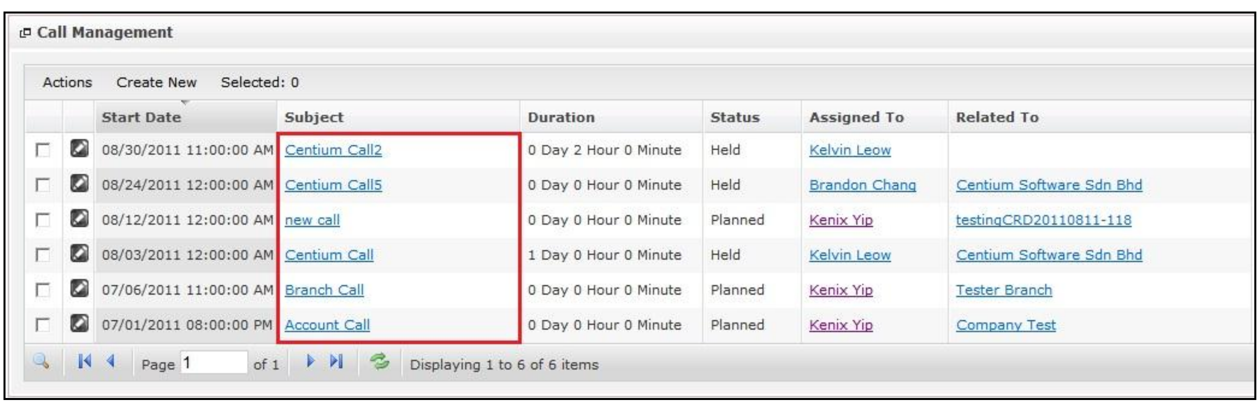


Figure 12.3: Subject Hyperlink

After clicking the Subject hyperlink, page will navigate to the **Call Management Detail** page which displays all the details of the Call.

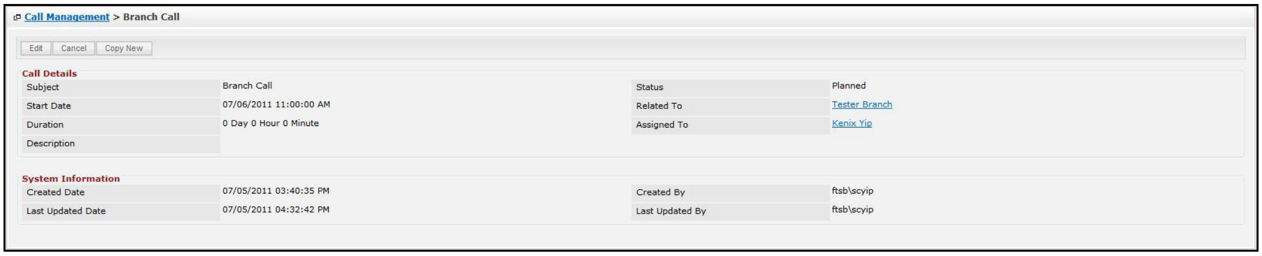


Figure 12.4: Call Management Detail Page

To copy the entire record and save as a new record, click Copy New button at **Call Maintenance Detail** page.

To create a new call, click at Create New menu at the top of the Call Listing.

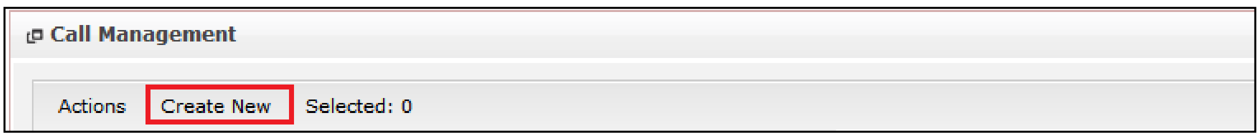


Figure 12.5: Create New Call Menu

After clicking Create New menu, page will navigate to **Call Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Call Management Detail** page or click Cancel button to cancel creating and navigates back to the **Call Listing** page.

***Related Topics**: See "Create New Call"*

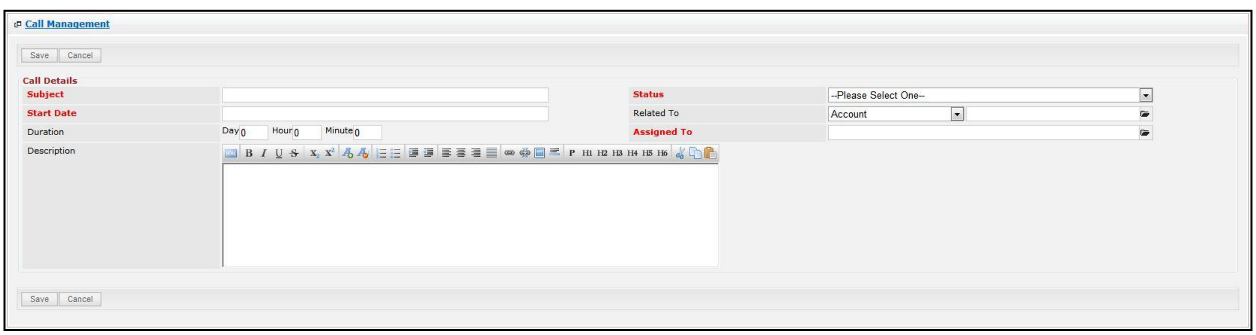


Figure 12.6: Call Management Create New Page

To **delete** a call, select the record and click **Actions > Delete**.

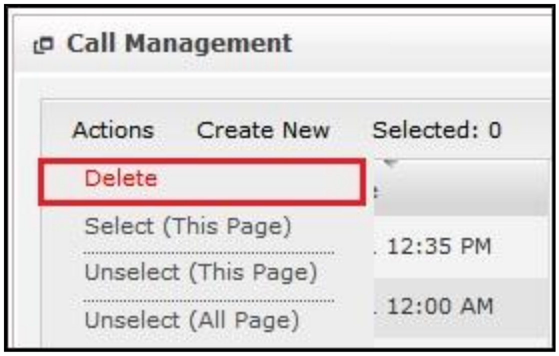


Figure 12.7: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 12.8: Message Showing Call Deleted Successfully

Deleted call will **no longer** be displayed in Call Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

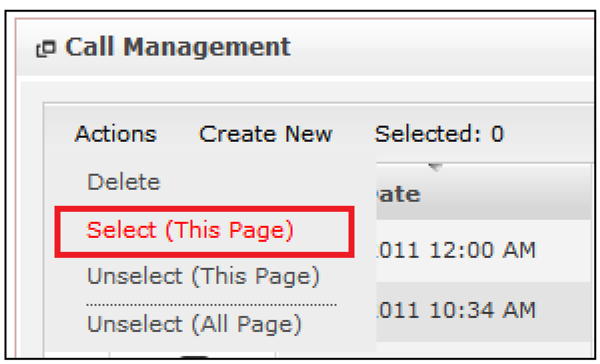


Figure 12.9: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

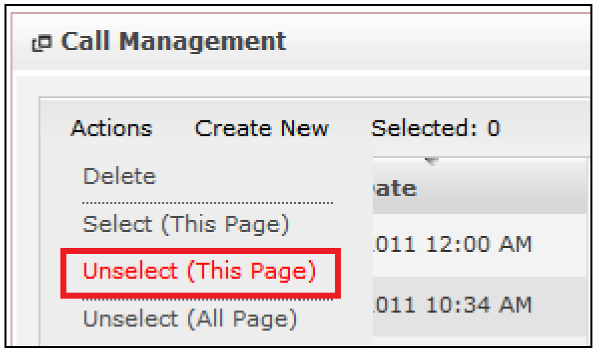


Figure 12.10: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

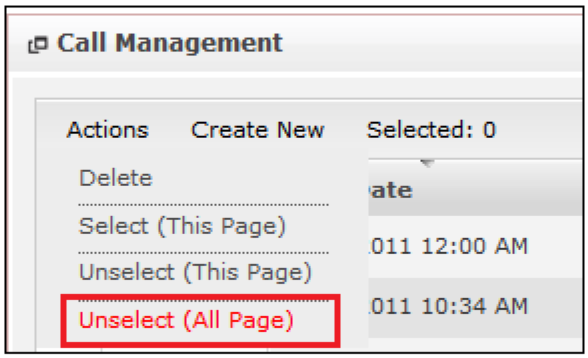


Figure 12.11: Actions > Unselect (All Pages) Menu

To go to the First Page of the listing, click at the **First Page**  button.

To go to the Previous Page of the listing, click at the **Previous Page**  button.

To go to the Next Page of the listing, click at the **Next Page**  button.

To go to the Last Page of the listing, click at the **Last Page**  button.

To refresh the listing page, click at the **Refresh**  button.

To search for record/s, click at the **Search**  button. An **Advance Search** section will expand at the bottom of the listing for user to select the search field and enter search value.

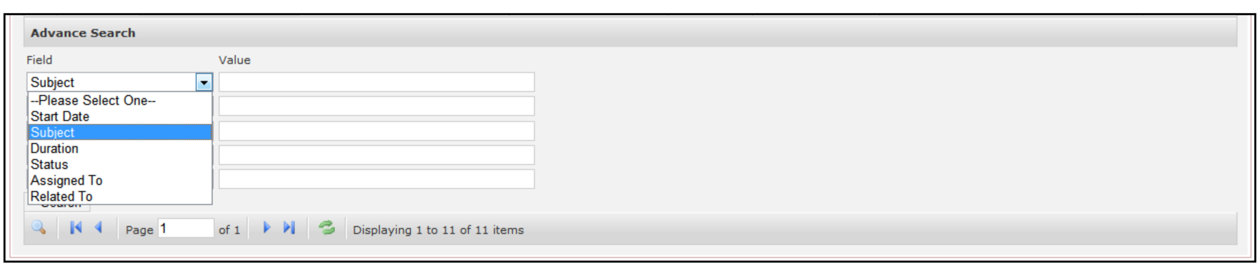


Figure 12.12: Call Advance Search

To edit the details of the Call, click at the **Edit** button or click the Edit button in **Call Management Detail** page. After clicking at the **Edit** button page will navigate to the **Call Management Edit** page.

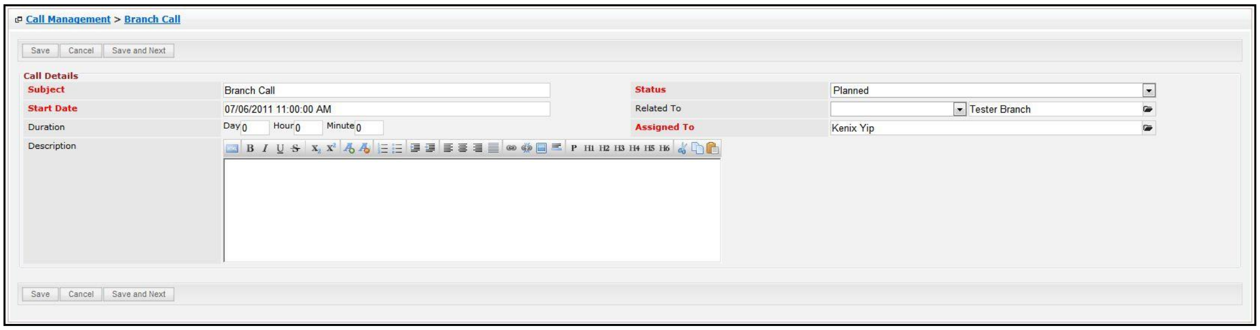


Figure 12.13: Call Management Edit Page

Edit the relevant details and click Save button to save the changes and navigates back to **Call Management Detail** page. Or click Cancel button to cancel editing and navigates back to the **Call Management Detail** page.

Related Topics: *See "Edit Call"*

Create New Call

To create new call, click at the **Collaboration > Call** menu at the Main Menu bar. Then click the Create New menu at the top of the **Call Listing**. After clicking Create New menu, page will navigate to **Call Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Call Management Detail** page.

There is only **one** main section to be filled in to create a new Call: **Call Details**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Call Details**

- Compulsory fields: **Subject**, **Start Date**, **Status** and **Assigned To**.

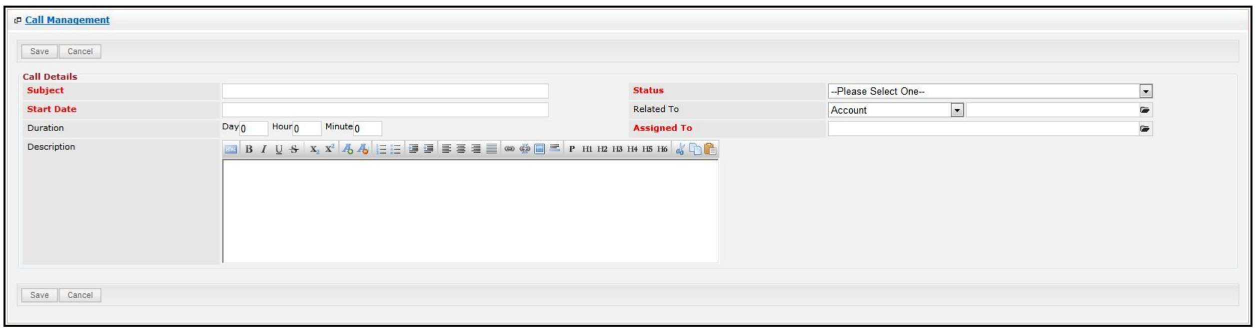


Figure 12.14: Create New Call – Call Details

- **Subject** field will be the Call Name for identification.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Call. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Call is created. Click at the Done menu to set the date and time.

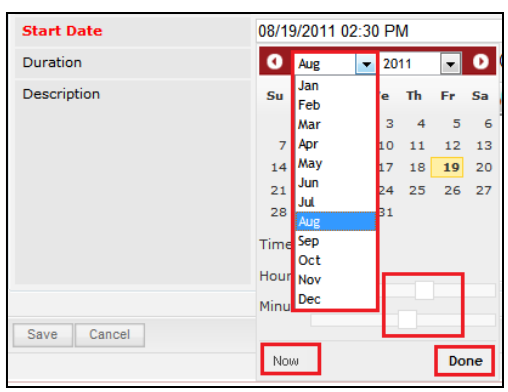


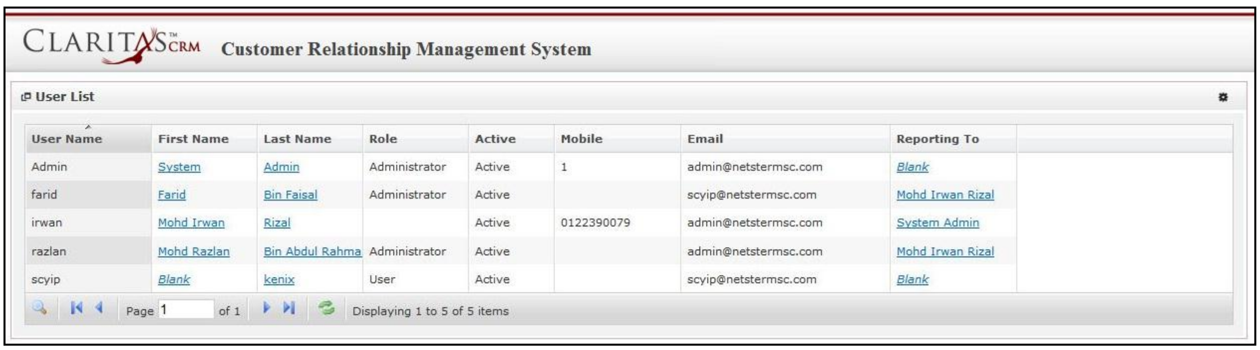
Figure 12.15: Start Date Time

- **Status** field is the status of the Campaign created; Options available are: **Planned**, **Held** or **Not Held**.

- **Assigned To** field is to assign a User to in charge of the Call for the related Contact. There are two ways of entering the **Assigned To** field:
    i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)
    OR

Figure 12.16: Assigned To Field Auto Complete Dropdown

    ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Figure 12.17: Assigned To Popup

To **cancel creating New Call**, click Cancel button. Page will navigate back to **Call Listing** page.

Edit Call

To edit call details, click at the **Collaboration > Call** menu at the Main Menu bar. Click at the **Edit** button in **Call Listing** page or click at the <u>Subject</u> hyperlink in **Call Listing** page then click the Edit button in **Call Management Detail** page. After clicking the **Edit** button or Edit button, page will navigate to **Call Management** page. Edit the relevant details and click Save button to save the changes and navigates back to **Call Management Detail** page or click Save and Next button to save the changes and navigates to the **Call Management Edit page** for the next record.

There is only **one** main section of Calls to be edited: **Call Details**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Call Details**

- Compulsory fields: **Subject**, **Start Date**, **Status** and **Assigned To**.

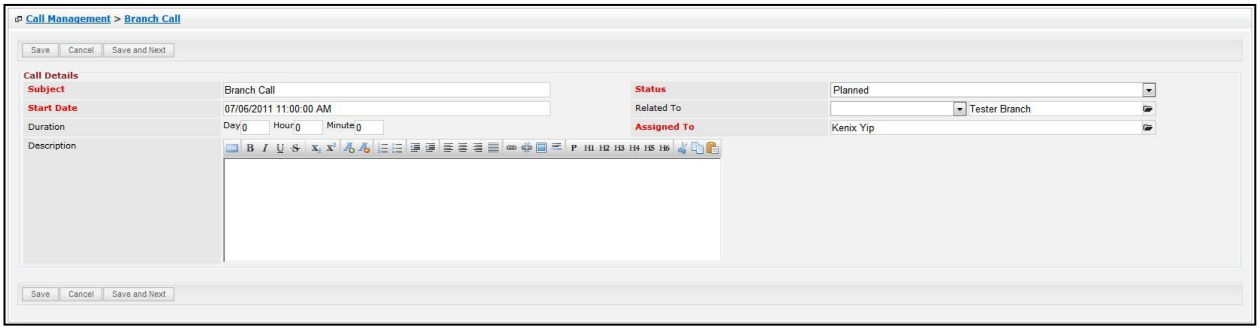


Figure 12.18: Edit Call – Call Details

- **Subject** field will be the Call Name for identification.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Call. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Call is created. Click at the Done menu to set the date and time.

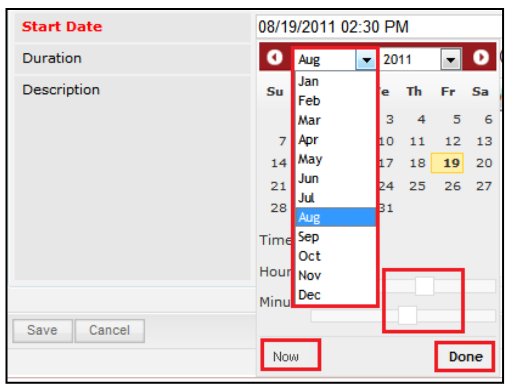
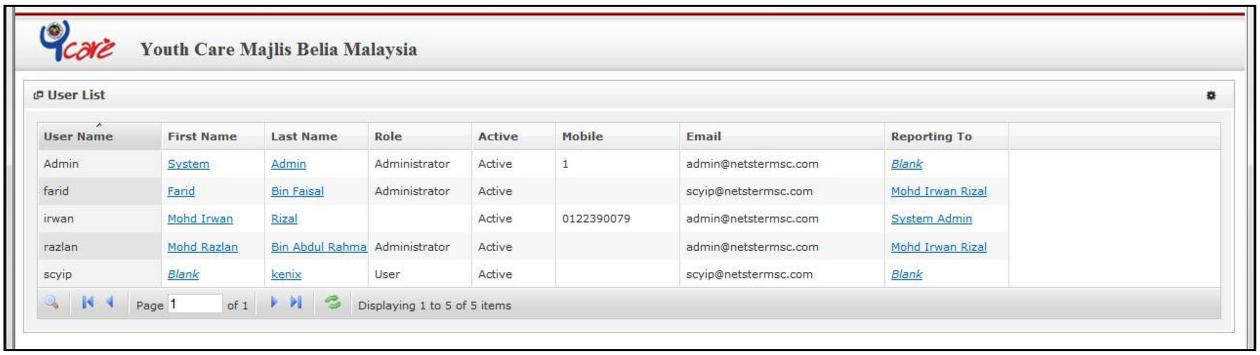


Figure 12.19: Start Date Time

- **Status** field is the status of the Campaign created; Options available are: **Planned**, **Held** or **Not Held**.
- **Assigned To** field is to assign a User to in charge of the Call for the related Contact. There are two ways of entering the **Assigned To** field:
    i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 12.20: Assigned To Field Auto Complete Dropdown

ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 12.21: Assigned To Popup

To **cancel editing New Call**, click Cancel button at **Call Management Detail** page. Page will navigate back to **Call Listing** page.

13 Collaboration – Task

This module is to **create and store Task details**.

Task Listing

To view Task Listing, click at the **Collaboration > Task** menu at the Main Menu bar.

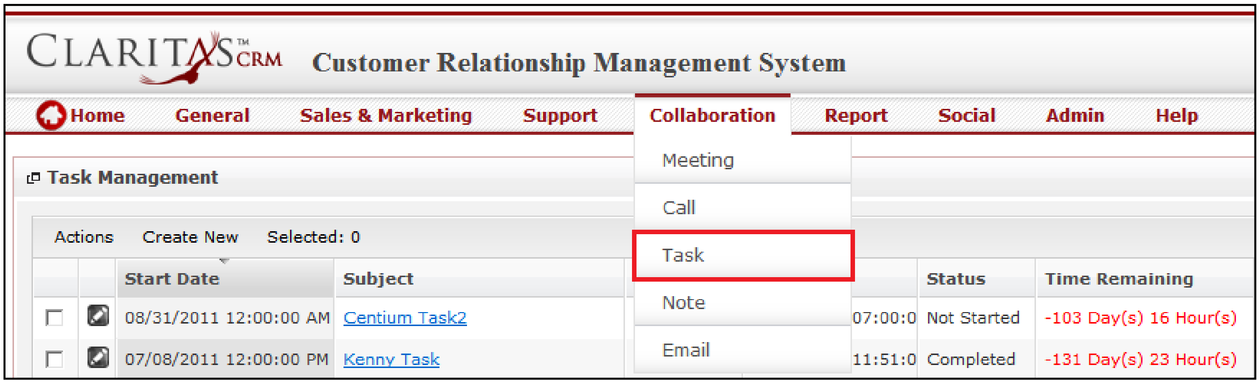


Figure 13.1: Task Menu in Main Menu

Page will load the list of the Task available in the system.

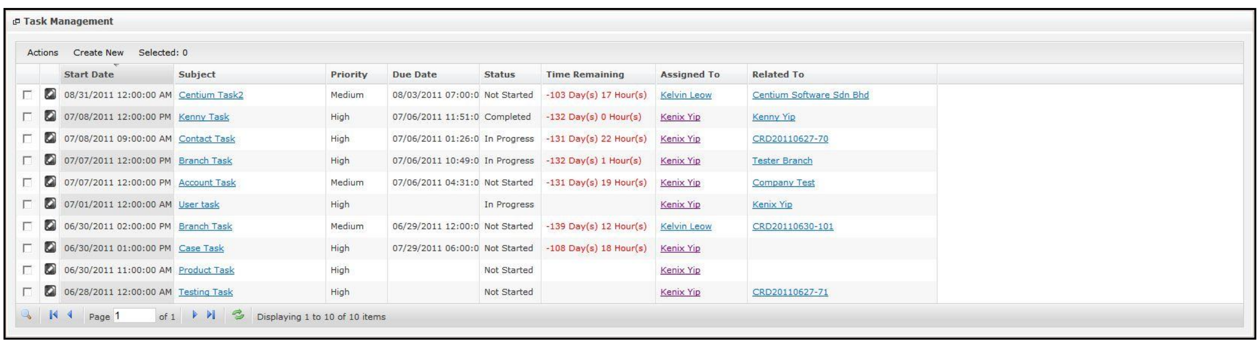
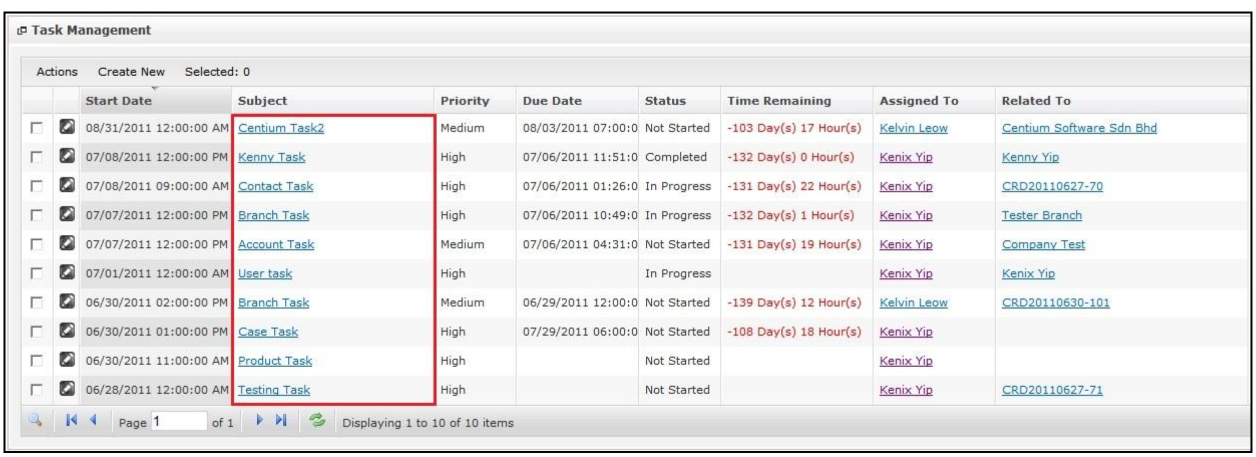


Figure 13.2: Task Listing

To view the Task Details, click at the <u>Subject</u> hyperlink in Subject column.



Task Management

Actions Create New Selected: 0

Start Date	Subject	Priority	Due Date	Status	Time Remaining	Assigned To	Related To
08/31/2011 12:00:00 AM	Centium Task2	Medium	08/03/2011 07:00:0	Not Started	-103 Day(s) 17 Hour(s)	Kelvin Leow	Centium Software Sdn Bhd
07/08/2011 12:00:00 PM	Kenny Task	High	07/06/2011 11:51:0	Completed	-132 Day(s) 0 Hour(s)	Kenix Yip	Kenny Yip
07/08/2011 09:00:00 AM	Contact Task	High	07/06/2011 01:26:0	In Progress	-131 Day(s) 22 Hour(s)	Kenix Yip	CRD20110627-70
07/07/2011 12:00:00 PM	Branch Task	High	07/06/2011 10:49:0	In Progress	-132 Day(s) 1 Hour(s)	Kenix Yip	Tester Branch
07/07/2011 12:00:00 PM	Account Task	Medium	07/06/2011 04:31:0	Not Started	-131 Day(s) 19 Hour(s)	Kenix Yip	Company Test
07/01/2011 12:00:00 AM	User task	High		In Progress		Kenix Yip	Kenix Yip
06/30/2011 02:00:00 PM	Branch Task	Medium	06/29/2011 12:00:0	Not Started	-139 Day(s) 12 Hour(s)	Kelvin Leow	CRD20110630-101
06/30/2011 01:00:00 PM	Case Task	High	07/29/2011 06:00:0	Not Started	-108 Day(s) 18 Hour(s)	Kenix Yip	
06/30/2011 11:00:00 AM	Product Task	High		Not Started		Kenix Yip	
06/28/2011 12:00:00 AM	Testing Task	High		Not Started		Kenix Yip	CRD20110627-71

Page 1 of 1 Displaying 1 to 10 of 10 items

Figure 13.3: Subject Hyperlink

After clicking the Subject hyperlink, page will navigate to the **Task Management Detail** page which displays all the details of the Task.

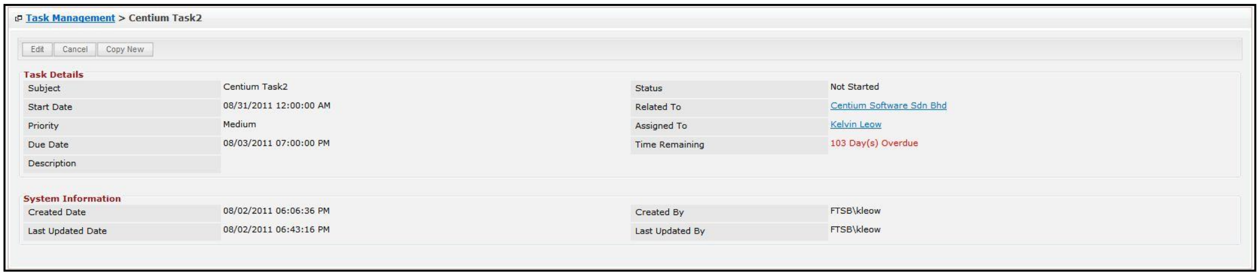


Figure 13.4: Task Management Detail Page

To copy the entire record and save as a new record, click Copy New button at **Task Maintenance Detail** page.

To create a new task, click at Create New menu at the top of the Task Listing.

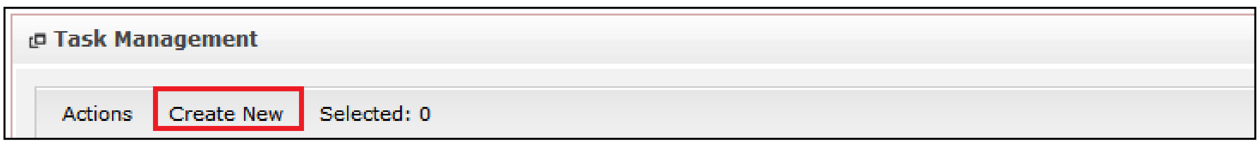


Figure 13.5: Create New Task Menu

After clicking Create New menu, page will navigate to **Task Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Task Management Detail** page or click Cancel button to cancel creating and navigates back to the **Task Listing** page.

***Related Topics**: See "[Create New Task]"*

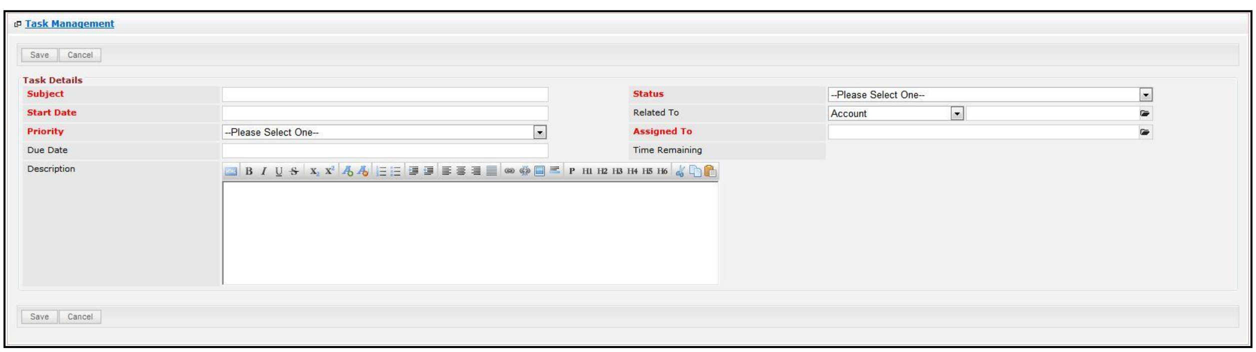


Figure 13.6: Task Management Create New Page

To **delete** a task, select the record and click **Actions > Delete**.

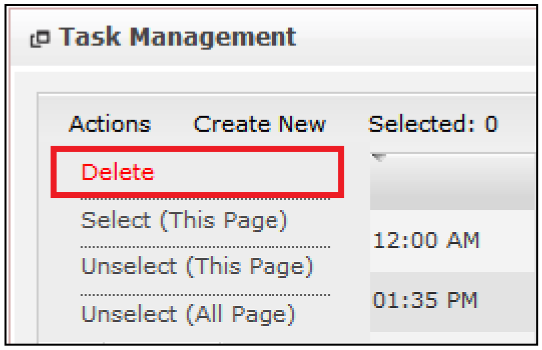


Figure 13.7: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 13.8: Message Showing Task Deleted Successfully

Deleted task will **no longer** be displayed in Task Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

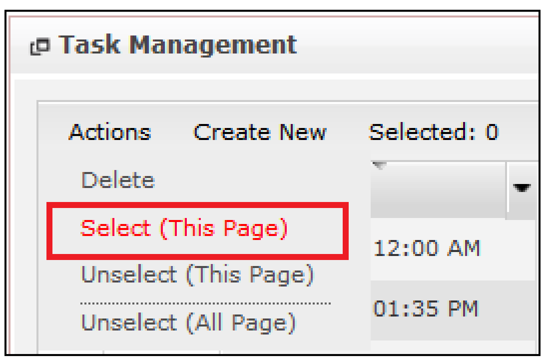


Figure 13.9: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

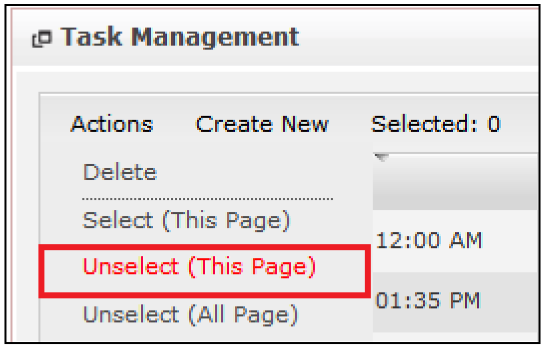


Figure 13.10: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

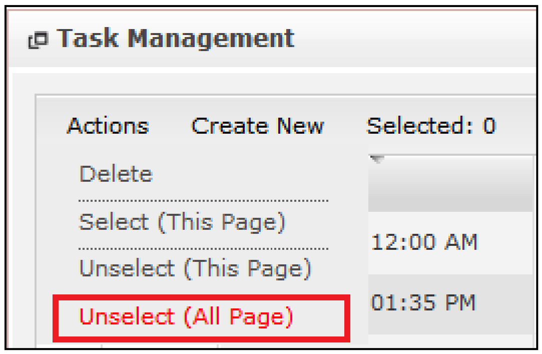


Figure 13.11: Actions > Unselect (All Pages) Menu

To go to the First Page of the listing, click at the **First Page**  button.

To go to the Previous Page of the listing, click at the **Previous Page**  button.

To go to the Next Page of the listing, click at the **Next Page**  button.

To go to the Last Page of the listing, click at the **Last Page**  button.

To refresh the listing page, click at the **Refresh**  button.

To search for record/s, click at the **Search**  button. An **Advance Search** section will expand at the bottom of the listing for user to select the search field and enter search value.

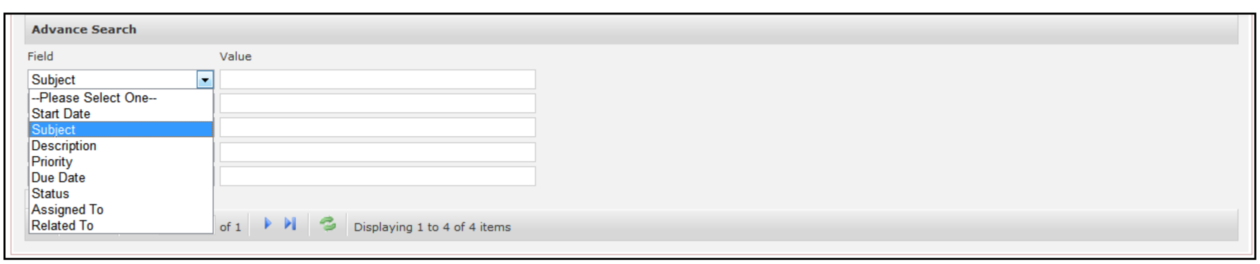


Figure 13.12: Task Advance Search

To edit the details of the Task, click at the **Edit** button or click the Edit button in **Task Management Detail** page. After clicking at the **Edit** button page will navigate to the **Task Management Edit** page.

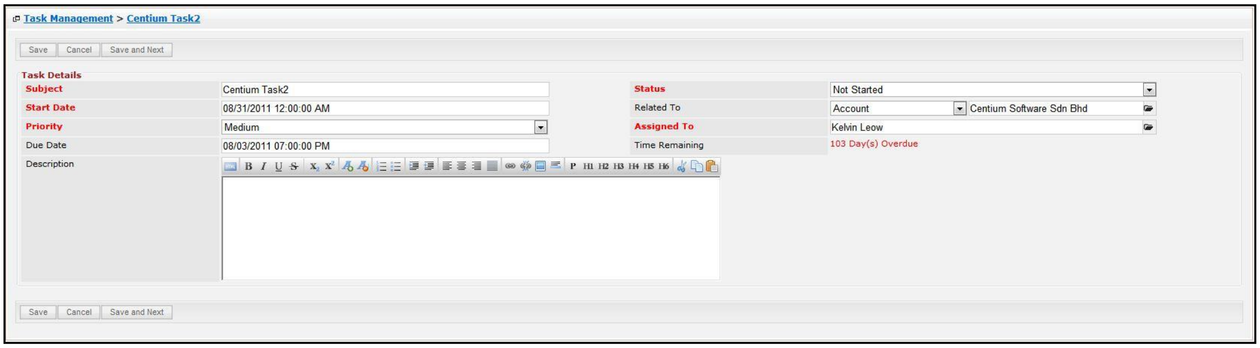


Figure 13.13: Task Management Edit Page

Edit the relevant details and click Save button to save the changes and navigates back to **Task Management Detail** page. Or click Cancel button to cancel editing and navigates back to the **Task Management Detail** page.

***Related Topics**: See "Edit Task"*

Create New Task

To create new task, click at the **Collaboration > Task** menu at the Main Menu bar. Then click the Create New menu at the top of the **Task Listing**. After clicking Create New menu, page will navigate to **Task Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Task Management Detail** page.

There is only **one** main section to be filled in to create a new Task: **Task Details**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Task Details**

- Compulsory fields: **Subject**, **Start Date**, **Priority**, **Status** and **Assigned To**.

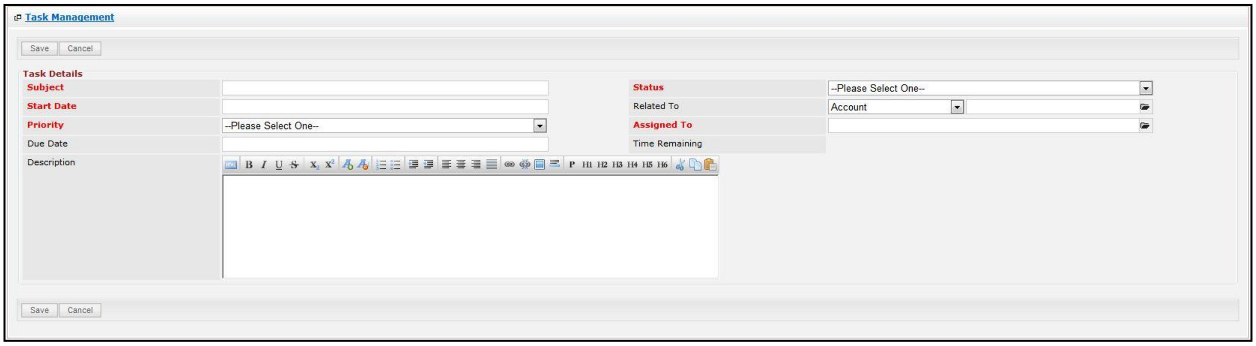


Figure 13.14: Create Task – Task Details

- **Subject** field will be the Task Name for identification.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Task. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Task is created. Click at the Done menu to set the date and time.

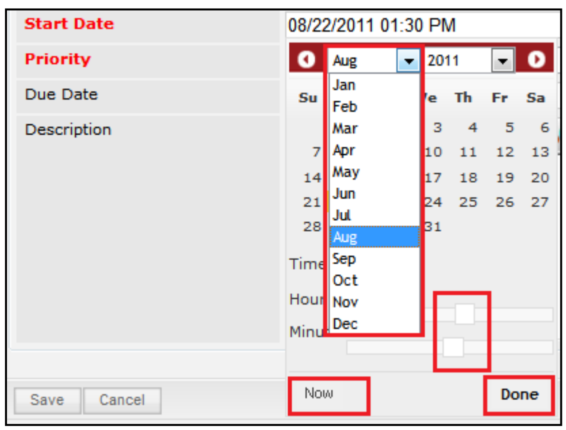


Figure 13.15: Start Date Time

- **Priority** field once selected will auto-populate the **Due Date** field and **Time Remaining** accordingly. If the Priority is **High**, the task will be due the **same** day; if the Priority is **Medium**, the task will be due in **three** days; if the Priority is **Low**, the task will be due in **five** days;
- There are five **Statuses** available for Task- **Not Started**, **In Progress**, **Completed**, **Pending Input**, and **Deferred.**
- **Assigned To** field is to assign a User to in charge of the Task for the related Contact. There are two ways of entering the Assigned To field:

i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)

OR

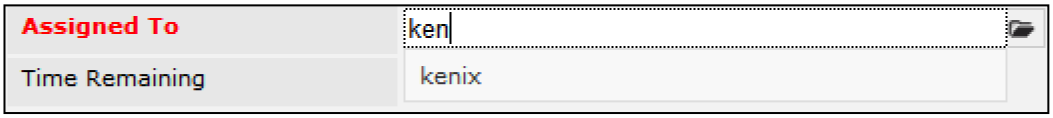
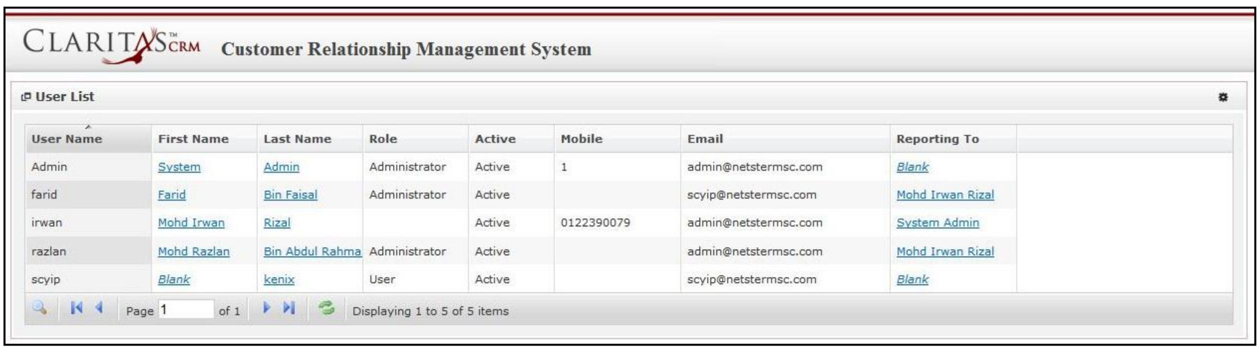


Figure 13.16: Assigned To Field Auto Complete Dropdown

ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 13.17: Assigned To Popup

To **cancel creating New Task**, click Cancel button. Page will navigate back to **Task Listing** page.

Edit Task

To edit task details, click at the **Collaboration > Task** menu at the Main Menu bar. Click at the **Edit** button in **Task Listing** page or click at the Subject hyperlink in **Task Listing** page then click the Edit button in **Task Management Detail** page. After clicking the **Edit** button or Edit button, page will navigate to **Task Management** page. Edit the relevant details and click Save button to save the changes and navigates back to **Task Management Detail** page or click Save and Next button to save the changes and navigates to the **Task Management Edit page** for the next record.

There is only **one** main section of Tasks to be edited: **Task Details**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Task Details**

- Compulsory fields: **Subject**, **Start Date**, **Status** and **Assigned To**.

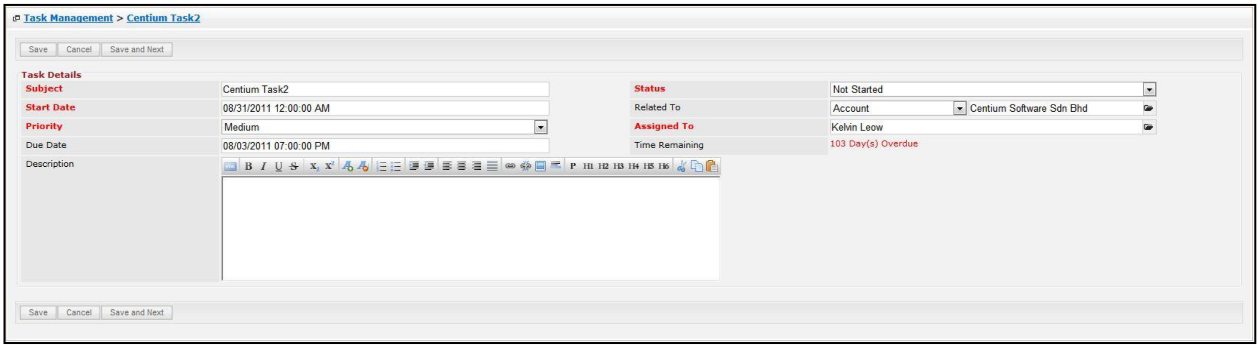


Figure 13.18: Edit Task – Task Details

- **Subject** field will be the Task Name for identification.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Task. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Task is created. Click at the Done menu to set the date and time.

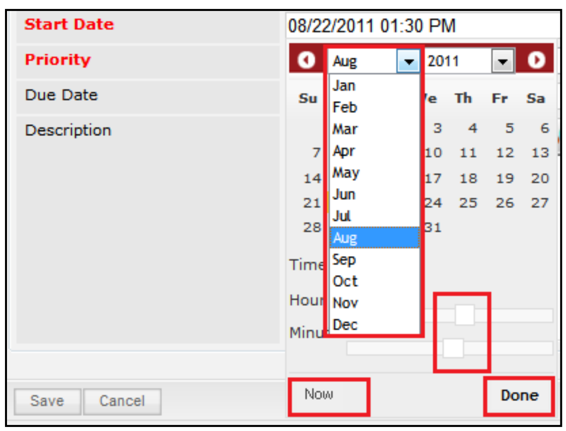


Figure 13.19: Start Date Time

- **Priority** field once selected will auto-populate the **Due Date** field and **Time Remaining** accordingly. If the Priority is **High**, the task will be due the **same** day; if the Priority is **Medium**, the task will be due in **three** days; if the Priority is **Low**, the task will be due in **five** days;
- There are five **Statuses** available for Task- **Not Started**, **In Progress**, **Completed**, **Pending Input**, and **Deferred.**
- **Assigned To** field is to assign a User to in charge of the Task for the related Contact. There are two ways of entering the Assigned To field:

i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)

OR

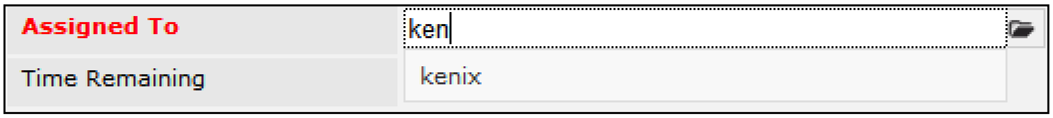
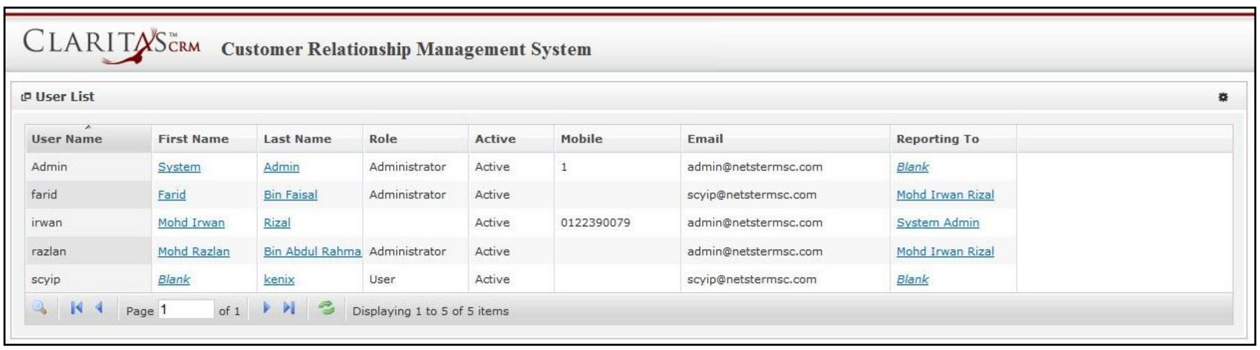


Figure 13.20: Assigned To Field Auto Complete Dropdown

ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Figure 13.21: Assigned To Popup

To **cancel editing New Task**, click Cancel button. Page will navigate back to **Task Listing** page.

14 Collaboration – Note

This module is to **create and store Note details**.

Note Listing

To view Note Listing, click at the **Collaboration > Note** menu at the Main Menu bar.

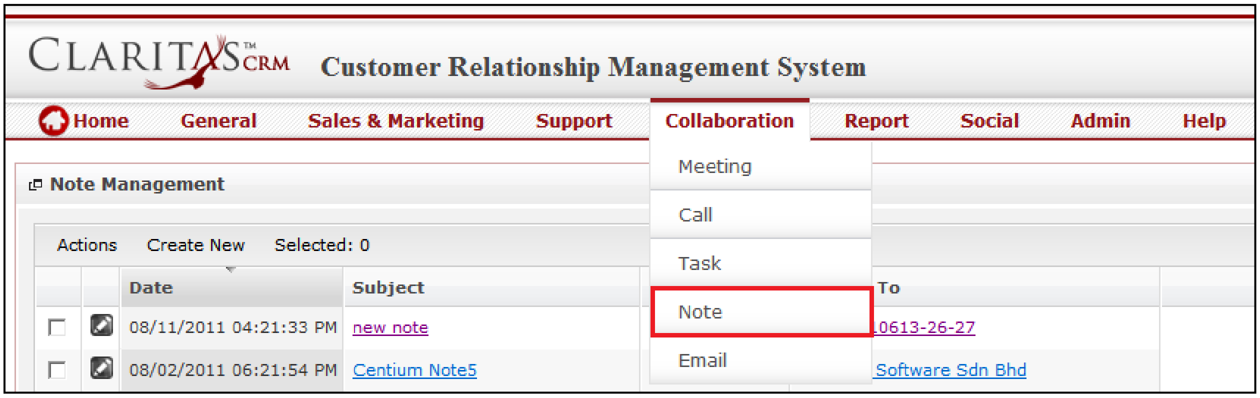


Figure 14.1: Note Menu in Main Menu

Page will load the list of the Note available in the system.

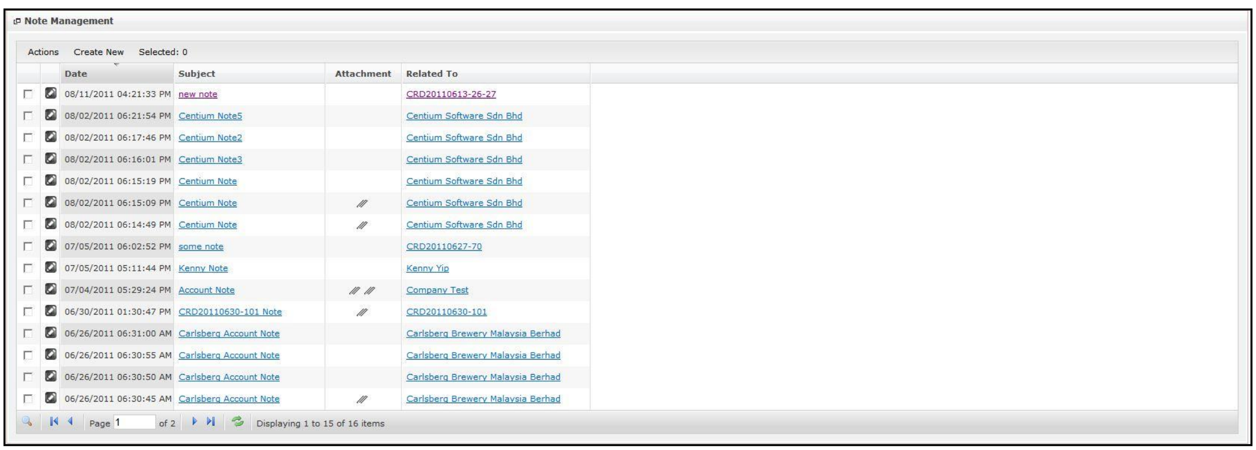


Figure 14.2: Note Listing

To view the Note Details, click at the Subject hyperlink in Subject column.

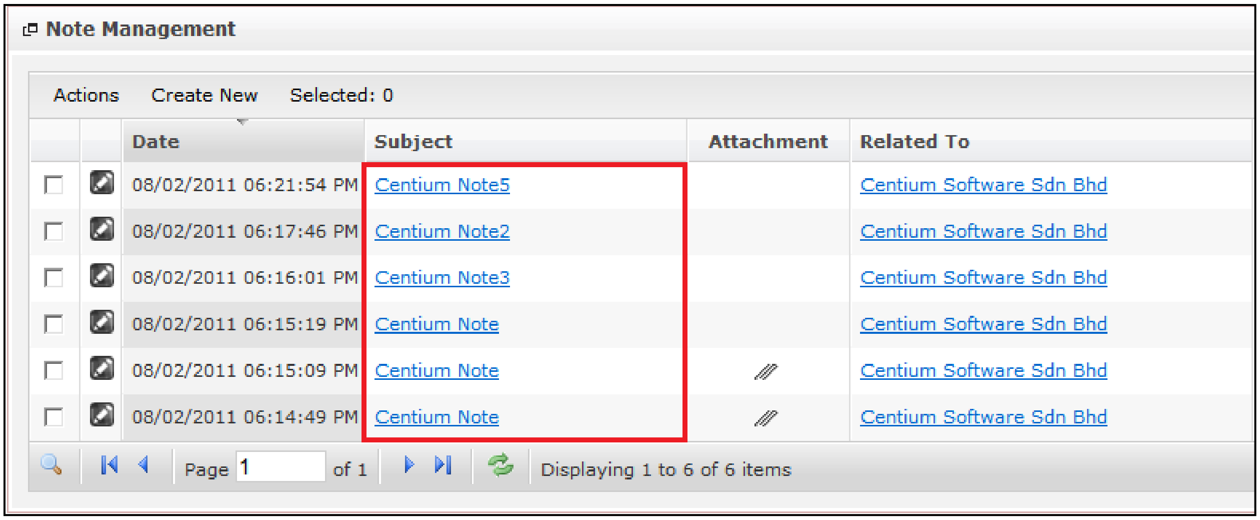


Figure 14.3: Subject Hyperlink

After clicking the <u>Subject</u> hyperlink, page will navigate to the **Note Management Detail** page which displays all the details of the Note.

Figure 14.4: Note Management Detail Page

To copy the entire record and save as a new record, click Copy New button at **Note Maintenance Detail** page.

To create a new note, click at Create New menu at the top of the Note Listing.

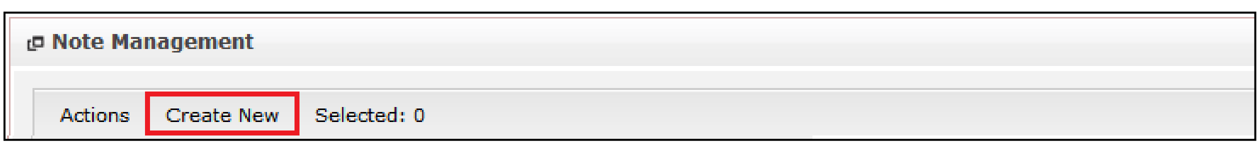


Figure 14.5: Create New Note Menu

After clicking Create New menu, page will navigate to **Note Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Note Management Detail** page or click Cancel button to cancel creating and navigates back to the **Note Listing** page.

***Related Topics**: See "<u>Create New Note</u>"*

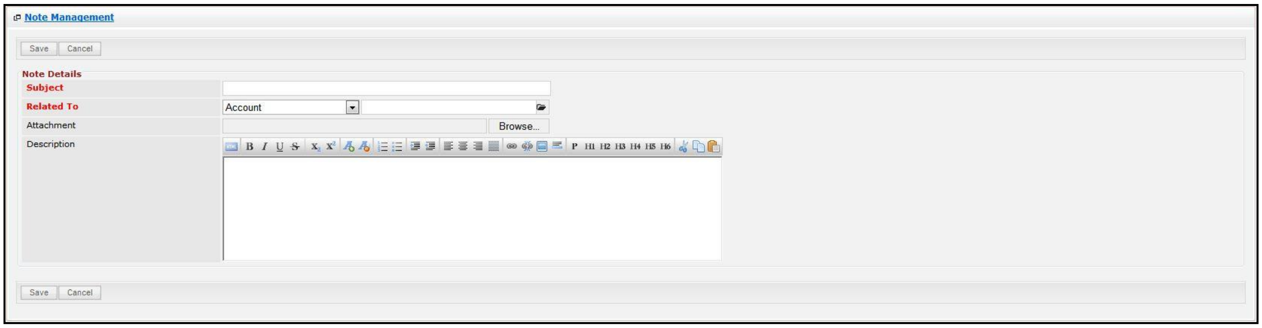


Figure 14.6: Note Management Create New Page

To **delete** a note, select the record and click **Actions > Delete**.

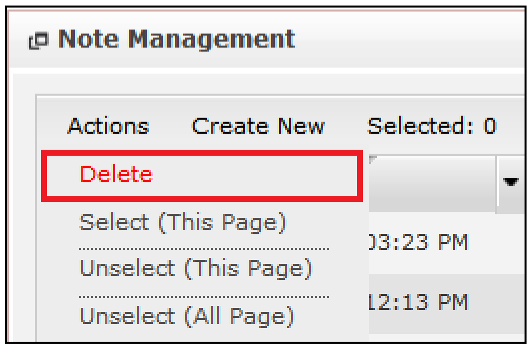


Figure 14.7: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 14.8: Message Showing Note Deleted Successfully

Deleted note will **no longer** be displayed in Note Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

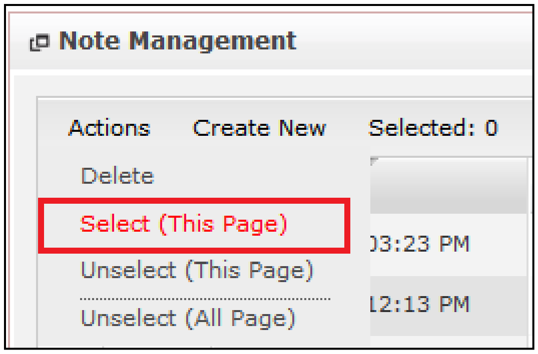


Figure 14.9: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

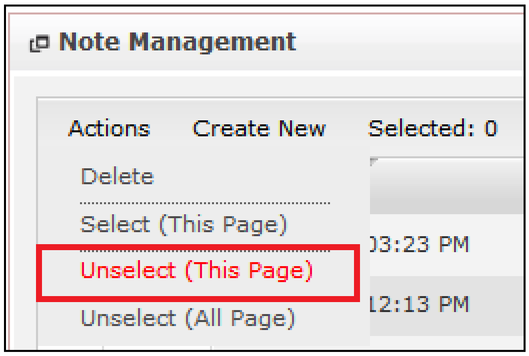


Figure 14.10: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

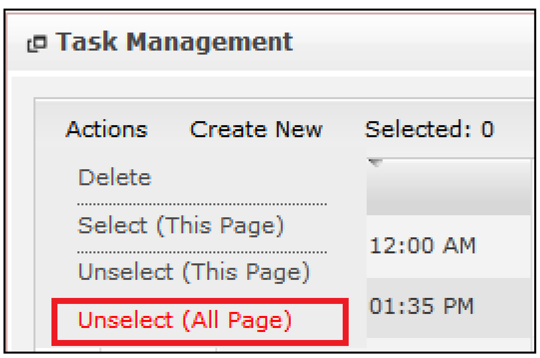


Figure 14.11: Actions > Unselect (All Pages) Menu

To go to the First Page of the listing, click at the **First Page**  button.

To go to the Previous Page of the listing, click at the **Previous Page**  button.

To go to the Next Page of the listing, click at the **Next Page**  button.

To go to the Last Page of the listing, click at the **Last Page**  button.

To refresh the listing page, click at the **Refresh**  button.

To search for record/s, click at the **Search** button. An **Advance Search** section will expand at the bottom of the listing for user to select the search field and enter search value.

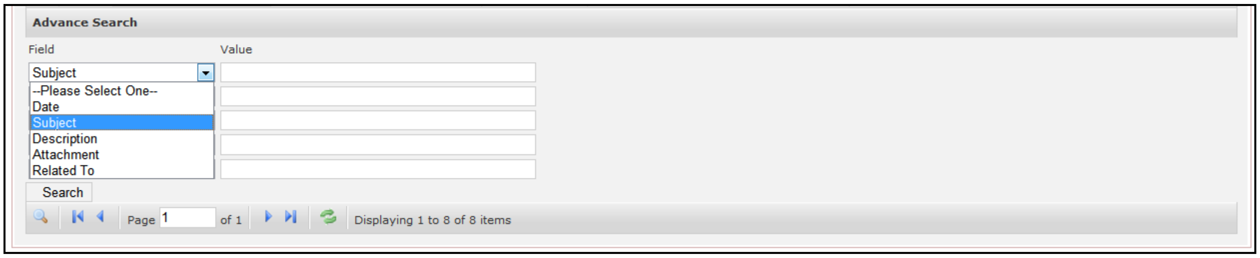


Figure 14.12: Note Advance Search

To edit the details of the Note, click at the **Edit** button or click the Edit button in **Note Management Detail** page. After clicking at the **Edit** button page will navigate to the **Note Management Edit** page.

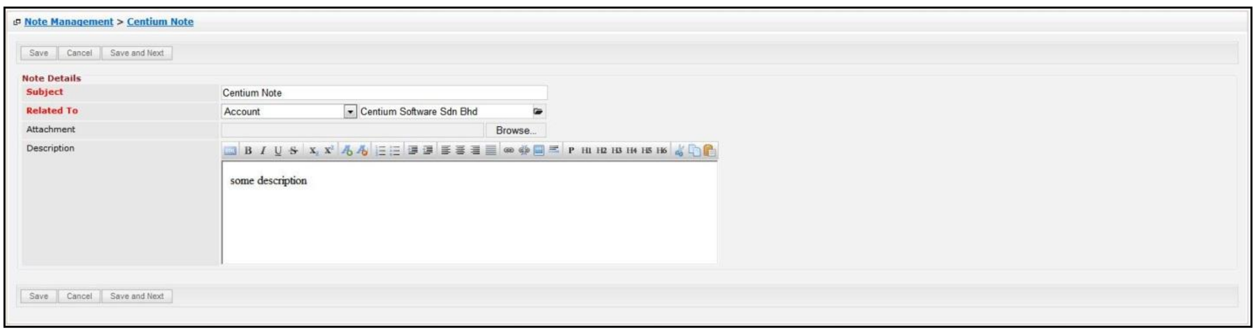


Figure 14.13: Note Management Edit Page

Edit the relevant details and click Save button to save the changes and navigates back to **Note Management Detail** page. Or click Cancel button to cancel editing and navigates back to the **Note Management Detail** page.

Related Topics*: See "Edit Note"*

Create New Note

To create new note, click at the **Collaboration > Note** menu at the Main Menu bar. Then click the Create New menu at the top of the **Note Listing**. After clicking Create New menu, page will navigate to **Note Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Note Management Detail** page.

There is only **one** main section to be filled in to create a new Note: **Note Details**.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

1) **Note Details**

- Compulsory fields: **Subject** and **Related To**.

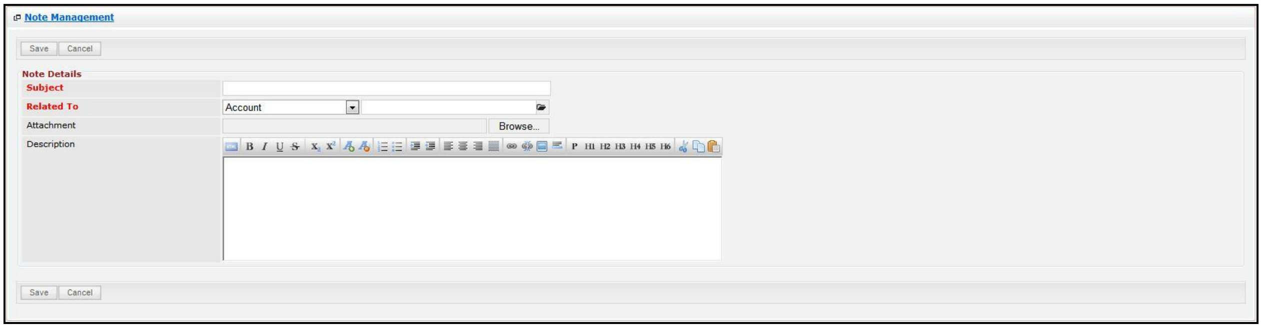


Figure 14.14: Create Note – Note Details

- **Subject** field will be the Meeting Name for identification.
- **Related To** field will auto populate the name of the related module.
- **Attachment** field allow file extensions are as below (format that is not stated are not allowed to be uploaded):
  - **Documents:** .doc, .docx, .xls, .xlsx, .rtf, .txt, .pdf, .ppt, .pptx
  - **Pictures:** .jpg, .bmp, .png, .bmp, .gif
  - **Audio:** .mp3, .wma
  - **Video:** .3gp, .mp4, .rmvb, .avi, .flv
  - **Archive:** .zip, .rar

To **cancel creating New Note**, click Cancel button. Page will navigate back to **Note Listing** page.

Edit Note

To edit note details, click at the **Collaboration > Note** menu at the Main Menu bar. Click at the **Edit** button in **Note Listing** page or click at the Subject hyperlink in **Note Listing** page then click the Edit button in **Note Management Detail** page. After clicking the **Edit** button or Edit button, page will navigate to **Note Management** page. Edit the relevant details and click Save button to save the changes and navigates back to **Note Management Detail** page or click Save and Next button to save the changes and navigates to the **Note Management Edit page** for the next record.

There is only **one** main section of Notes to be edited: **Note Details**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Note Details**

- Compulsory fields: **Subject** and **Related To**.

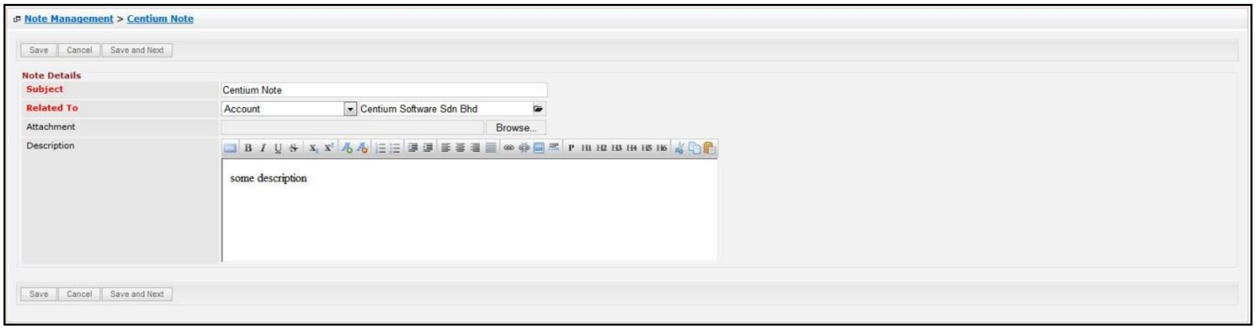
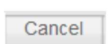


Figure 14.15: Edit Note – Note Details

- **Subject** field will be the Meeting Name for identification.
- **Related To** field will auto populate the name of the related module.
- **Attachment** field allow file extensions are as below (format that is not stated are not allowed to be uploaded):
    - **Documents:** .doc, .docx, .xls, .xlsx, . rtf, .txt, .pdf, .ppt, .pptx
    - **Pictures:** .jpg, .bmp, .png, .bmp, .gif
    - **Audio:** .mp3, .wma
    - **Video:** .3gp, .mp4, .rmvb, .avi, .flv
    - **Archive:** .zip, .rar

To **cancel editing New Note**, click 

button. Page will navigate back to **Note Listing** page.

15 Collaboration – Email

This module is to **store emails**.

Email Listing

To view Email Listing, click at the **Collaboration > Email** menu at the Main Menu bar.

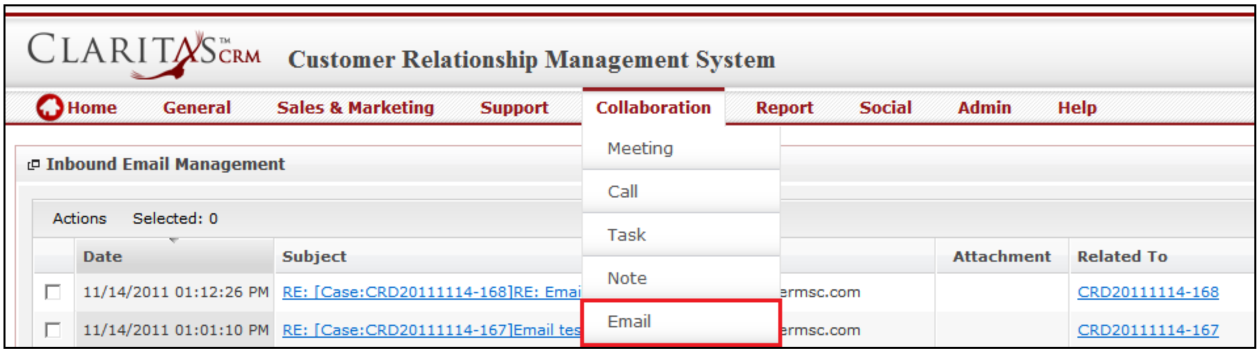


Figure 15.1: Email Menu in Main Menu

Page will load the list of the Email available in the system. This listing only displays all the Email sent by all the users or system through other module such as Campaign module. User cannot create a new email in this module itself.

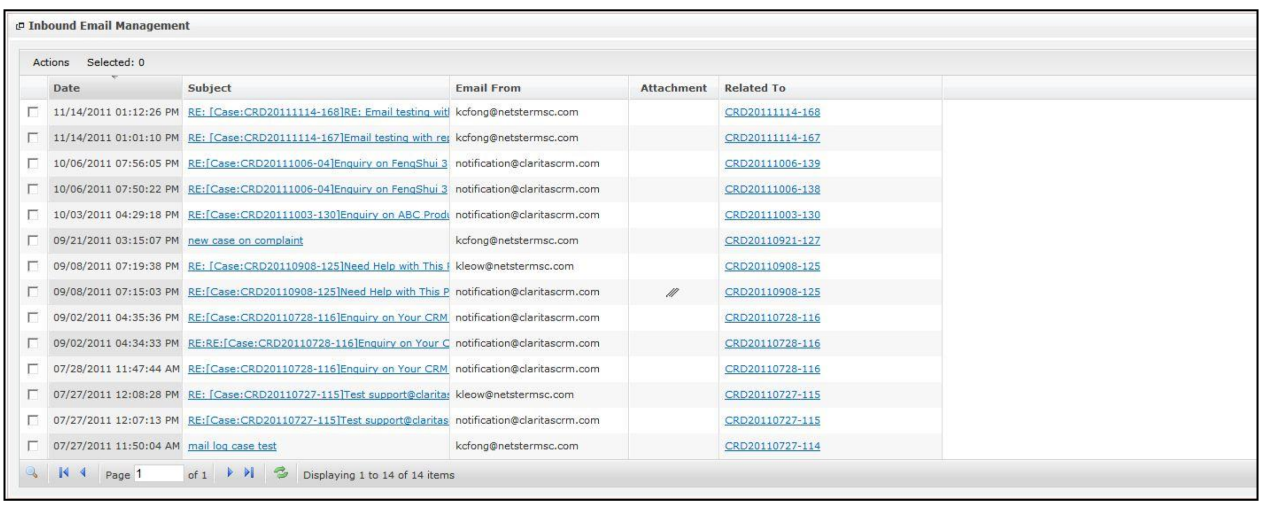


Figure 15.2: Email Listing

To view the Email Details, click at the Subject hyperlink in Subject column.

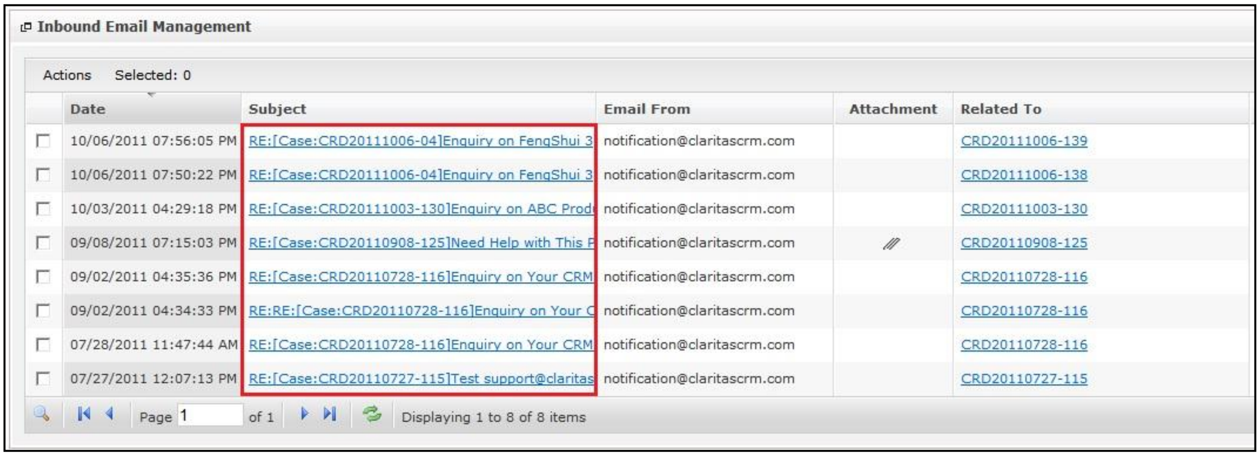


Figure 15.3: Subject Hyperlink

After clicking the Subject hyperlink, page will navigate to the **Email Management Detail** page which displays all the details of the Email.

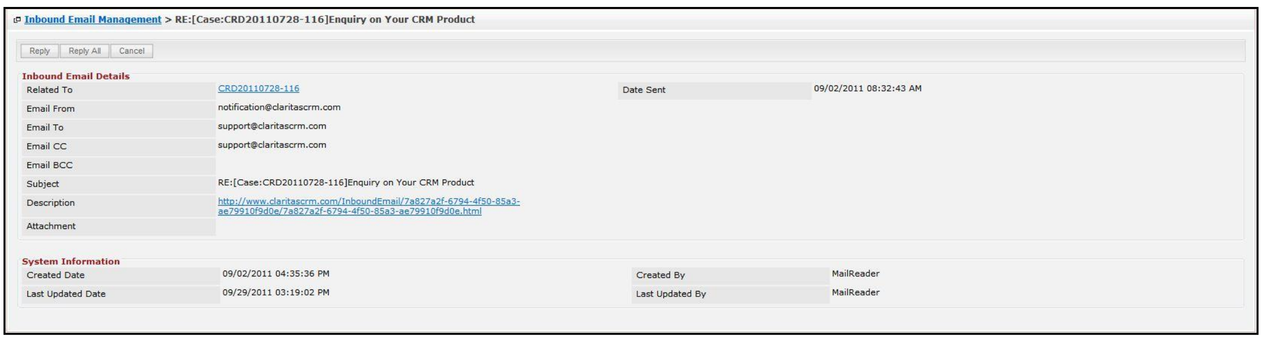


Figure 15.4: Email Management Detail Page

To **reply** the email to the **email sender**, click at the Reply button. A Compose Message window will pop up for user to enter the content and reply to that email.

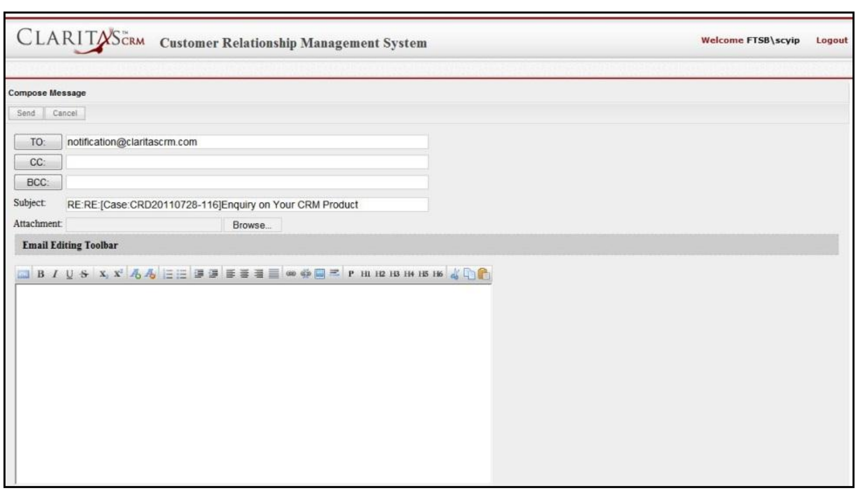


Figure 15.5: Reply – Compose Message Popup

To **reply** the email to **all users** (include sender and recipients), click at the Reply All button. A Compose Message window will pop up for user to enter the content and reply to that email.

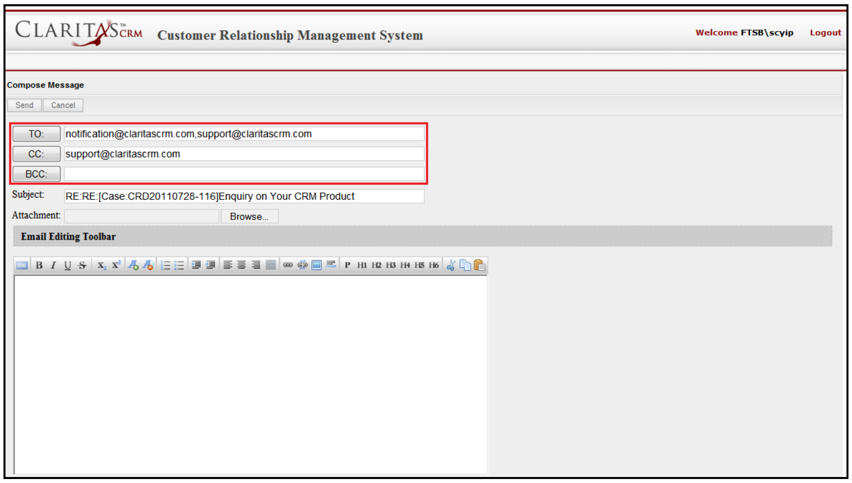


Figure 15.6: Reply All – Compose Message Popup

To **delete** an Email, select the record and click **Actions > Delete**.

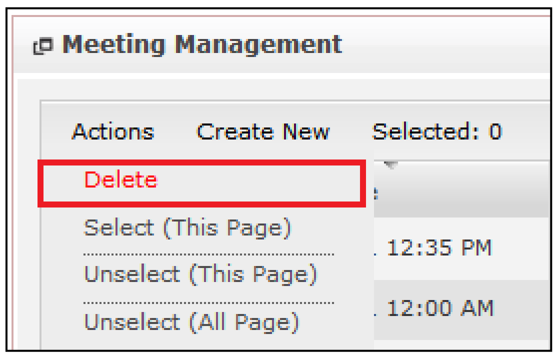


Figure 15.7: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 15.8: Message Showing Email Deleted Successfully

Deleted Email will **no longer** be displayed in Email Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

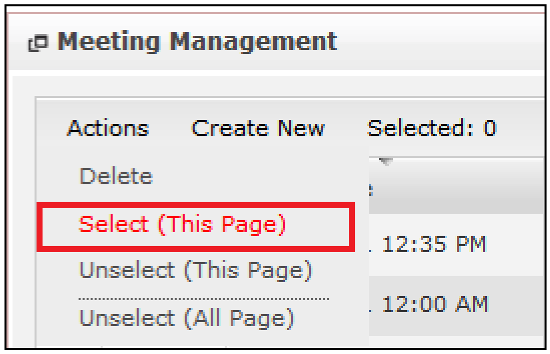


Figure 15.9: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

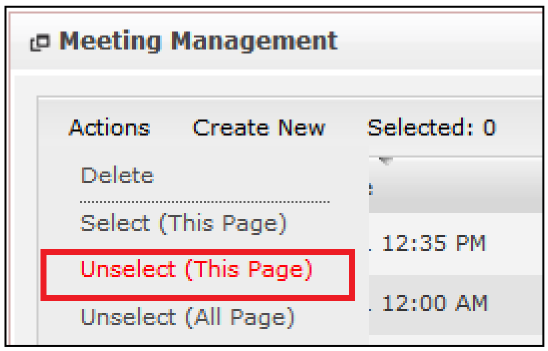


Figure 15.10: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

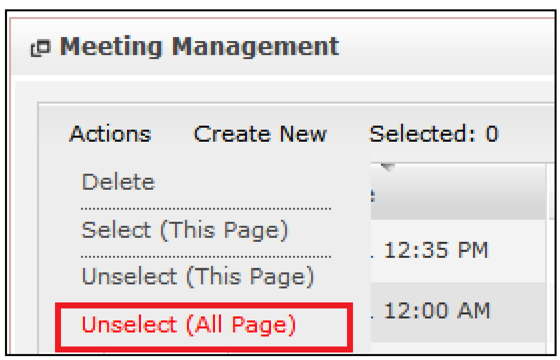


Figure 15.11: Actions > Unselect (All Pages) Menu

To go to the First Page of the listing, click at the **First Page**  button.

To go to the Previous Page of the listing, click at the **Previous Page**  button.

To go to the Next Page of the listing, click at the **Next Page**  button.

To go to the Last Page of the listing, click at the **Last Page**  button.

To refresh the listing page, click at the **Refresh**  button.

To search for record/s, click at the **Search**  button. An **Advance Search** section will expand at the bottom of the listing for user to select the search field and enter search value.

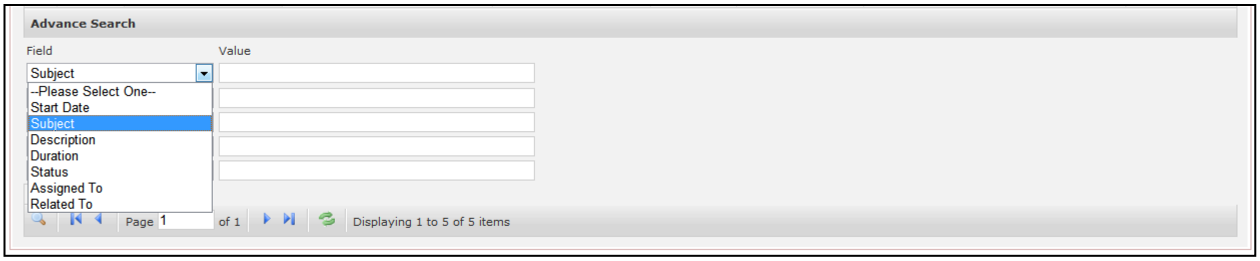


Figure 15.12: Email Advance Search

16 Report

This module stores all relevant reports of the system.

Case Reports

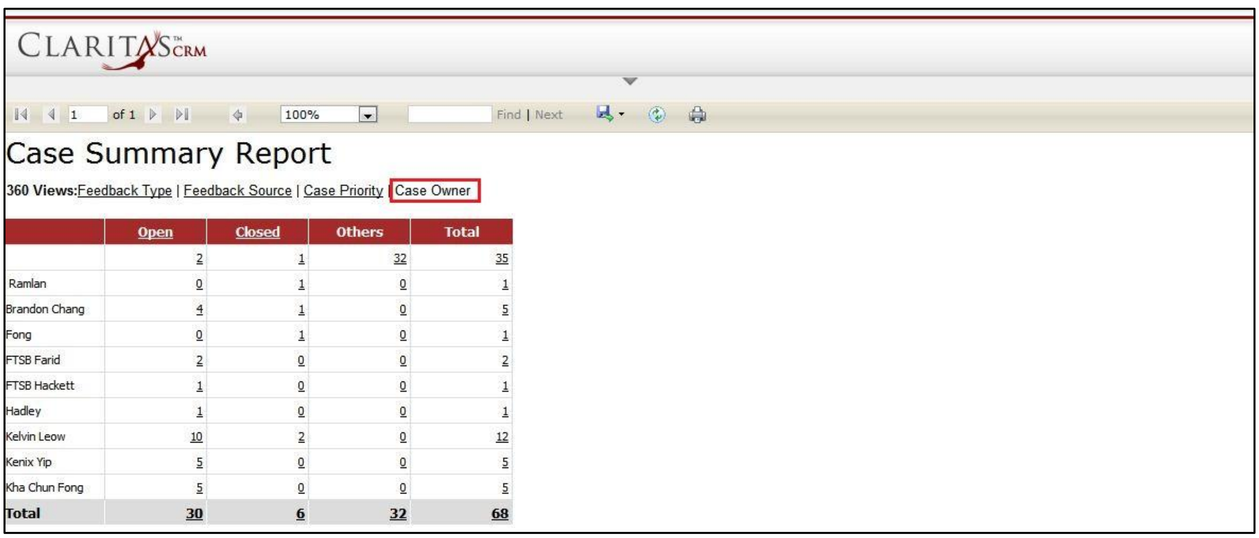
Case Summary Report

Click at **Report** menu at the Main Menu bar.

Figure 16.1: Report Menu in Main Menu

To view the **Case Summary Report**, click at the Case Report 01: Case Summary hyperlink, Case Summary Report window will pop up.

The report shows the Case Summary Report based on Case Owner (default view).



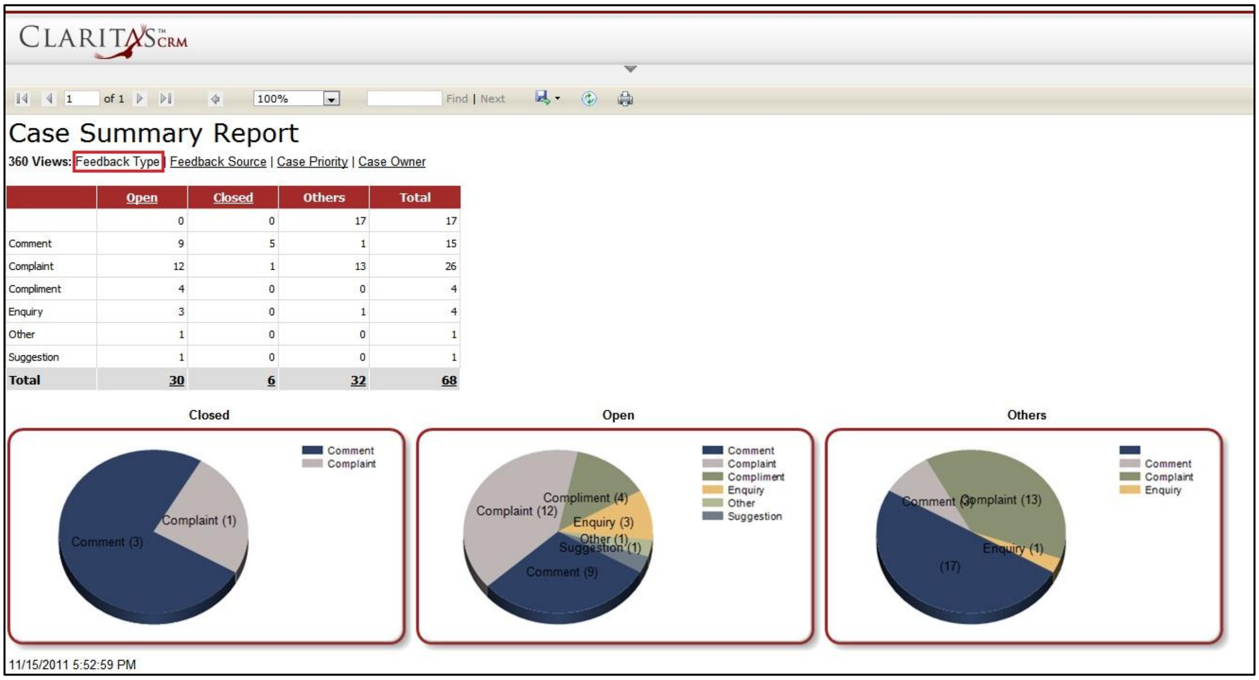
Case Summary Report

360 Views: Feedback Type | Feedback Source | Case Priority | Case Owner

	Open	Closed	Others	Total
	2	1	32	35
Ramlan	0	1	0	1
Brandon Chang	4	1	0	5
Fong	0	1	0	1
FTSB Farid	2	0	0	2
FTSB Hackett	1	0	0	1
Hadley	1	0	0	1
Kelvin Leow	10	2	0	12
Kenix Yip	5	0	0	5
Kha Chun Fong	5	0	0	5
Total	30	6	32	68

Figure 16.2: Case Summary Report (Case Owner)

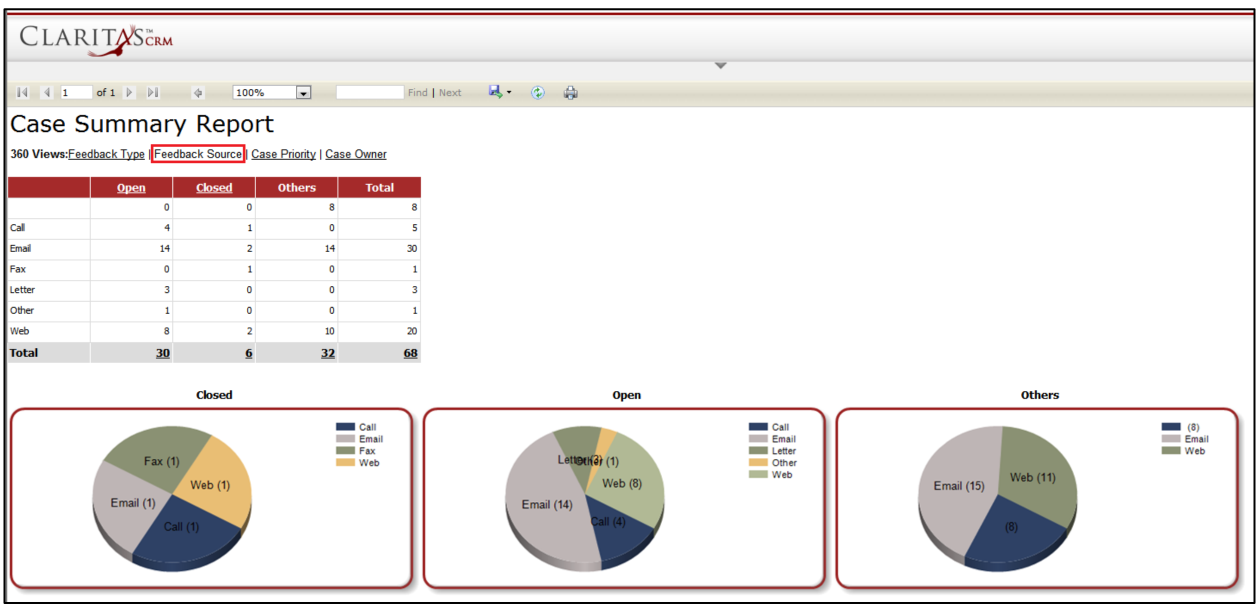
To view Case Summary Report based on Feedback Type, click at the Feedback Type hyperlink.



	Open	Closed	Others	Total
	0	0	17	17
Comment	9	5	1	15
Complaint	12	1	13	26
Compliment	4	0	0	4
Enquiry	3	0	1	4
Other	1	0	0	1
Suggestion	1	0	0	1
Total	30	6	32	68

Figure 16.3: Case Summary Report (Feedback Type)

To view Case Summary Report based on Feedback Source, click at the Feedback Source hyperlink.



	Open	Closed	Others	Total
	0	0	8	8
Call	4	1	0	5
Email	14	2	14	30
Fax	0	1	0	1
Letter	3	0	0	3
Other	1	0	0	1
Web	8	2	10	20
Total	30	6	32	68

Figure 16.4: Case Summary Report (Feedback Source)

To view Case Summary Report based on Case Priority, click at the Case Priority hyperlink.

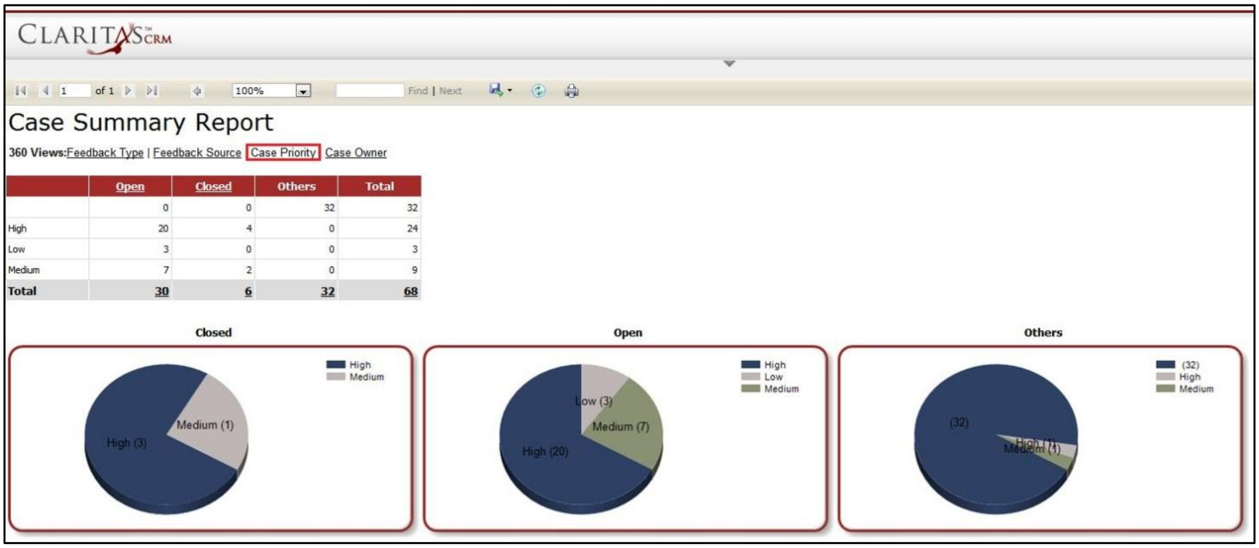


Figure 16.5: Case Summary Report (Case Priority)

User can also filter the record display by selecting the filters. Click at [dropdown arrow] and select the Field, Filter and Value. Then, click at the Refresh Report button. Page will refresh and display result based on the filter entered.

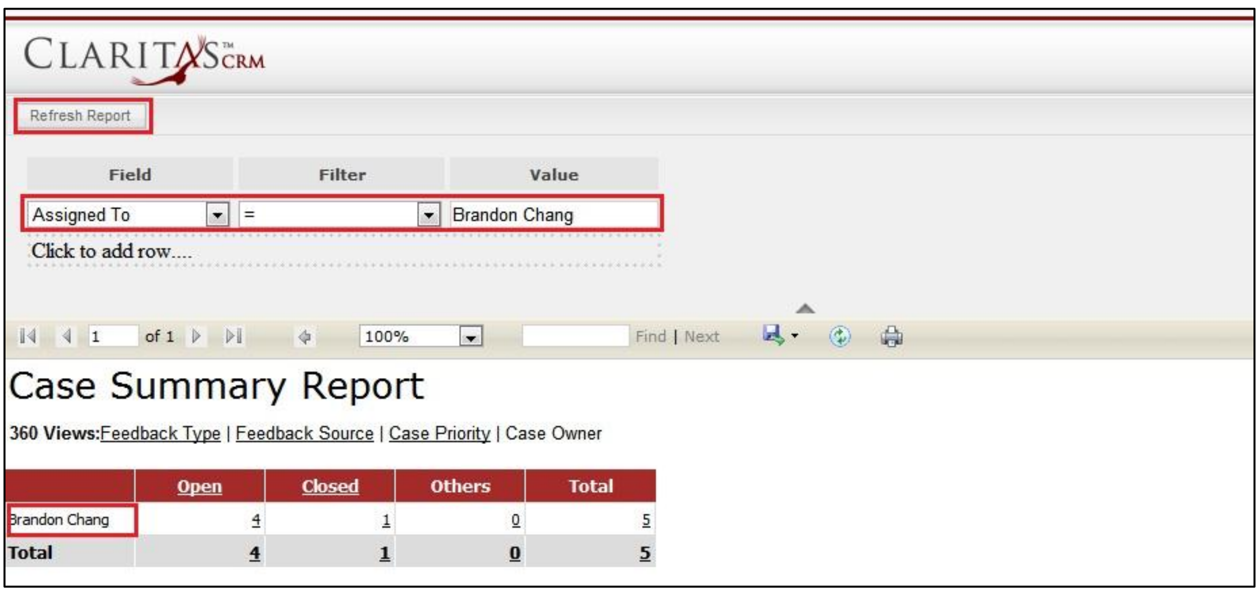


Figure 16.6: Filtered Case Summary Report

To go to the First Page of the report, click at the **First Page Image Icon** .

To go to the Previous Page of the report, click at the **Previous Page Image Icon** .

To go to the Next Page of the report, click at the **Next Page Image Icon** .

To go to the Last Page of the report, click at the **Last Page Image Icon** .

To find any keyword, type in the **keyword** (Example: **Case**) in the **Find textbox** and click **Find**.

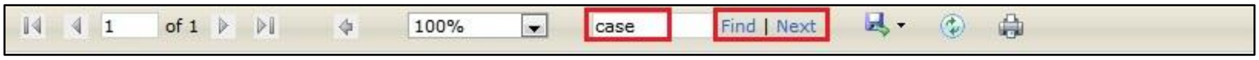


Figure 16.7: Find Textbox in Case Summary Report

To find next result of Case, click at the **Next** button.

To export the report to **Excel**, **PDF** or **Word**, click at the **Export Image Icon** and select the format of report to be exported as.

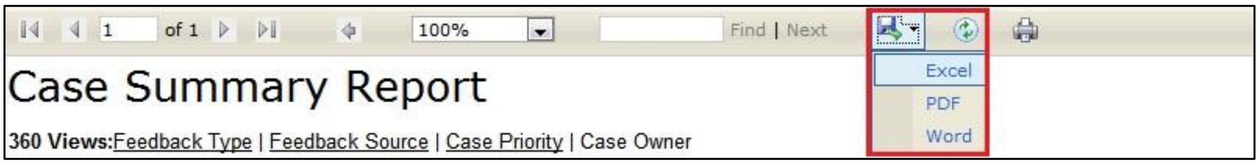


Figure 16.8: Export Case Summary Report

To refresh the report, click at the **Refresh Icon** . The page will refresh and report will reload.

To print the report, click at the **Print Icon** . A print window will pop up for user to check the setting before printing.

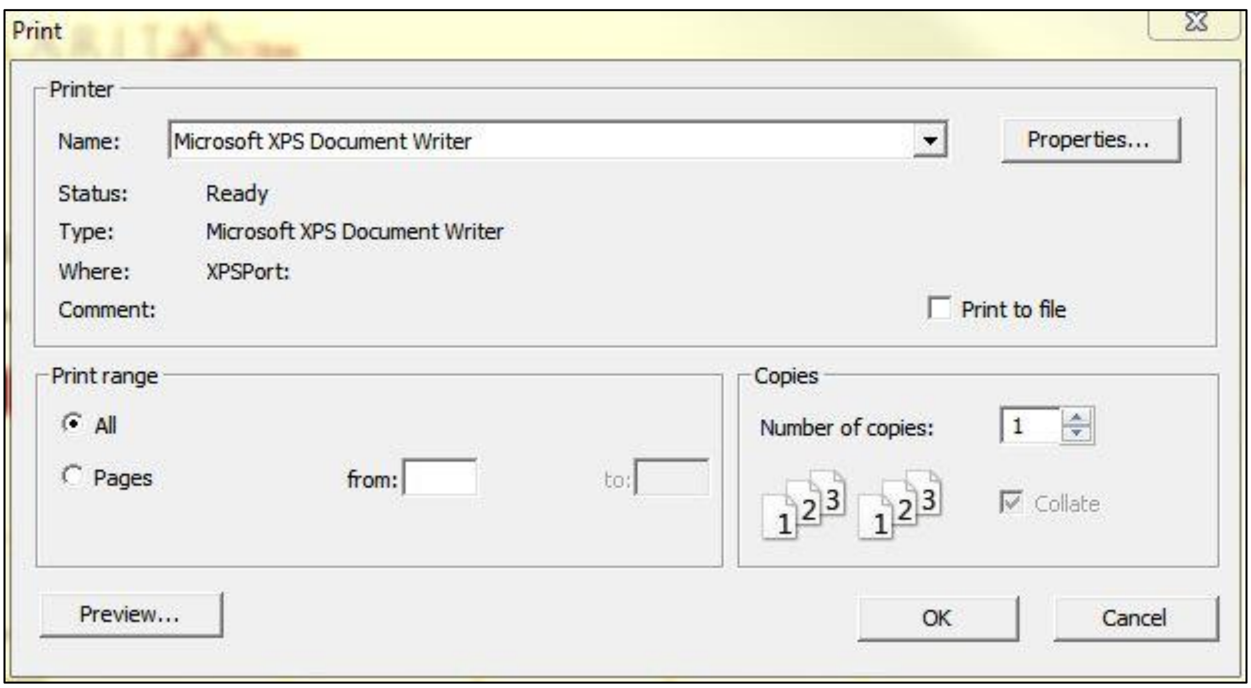


Figure 16.9: Print Popup

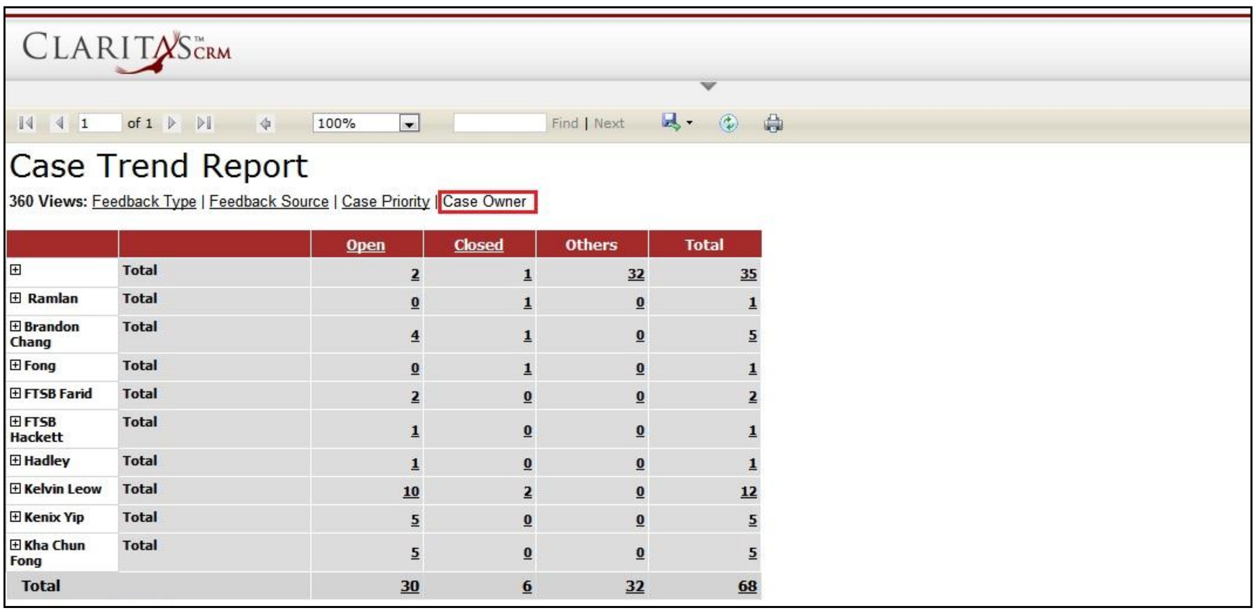
Case Trend

Click at **Report** menu at the Main Menu bar.

Figure 16.10: Report Menu in Main Menu

To view the **Case Trend**, click at the Case Report 02: Case Trend hyperlink, Case Trend Report window will pop up.

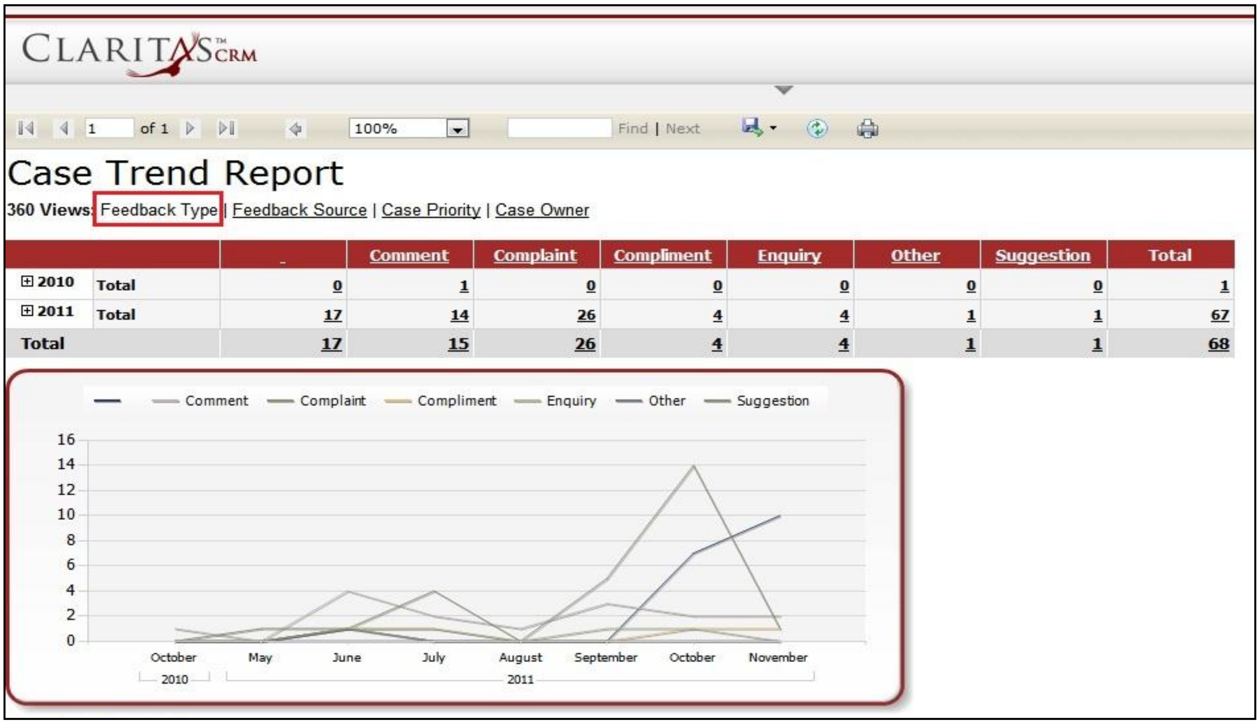
The report shows the Case Trend Report based on Case Owner (default view).



		Open	Closed	Others	Total
⊞	Total	2	1	32	35
⊞ Ramlan	Total	0	1	0	1
⊞ Brandon Chang	Total	4	1	0	5
⊞ Fong	Total	0	1	0	1
⊞ FTSB Farid	Total	2	0	0	2
⊞ FTSB Hackett	Total	1	0	0	1
⊞ Hadley	Total	1	0	0	1
⊞ Kelvin Leow	Total	10	2	0	12
⊞ Kenix Yip	Total	5	0	0	5
⊞ Kha Chun Fong	Total	5	0	0	5
Total		30	6	32	68

Figure 16.11: Case Trend Report (Case Owner)

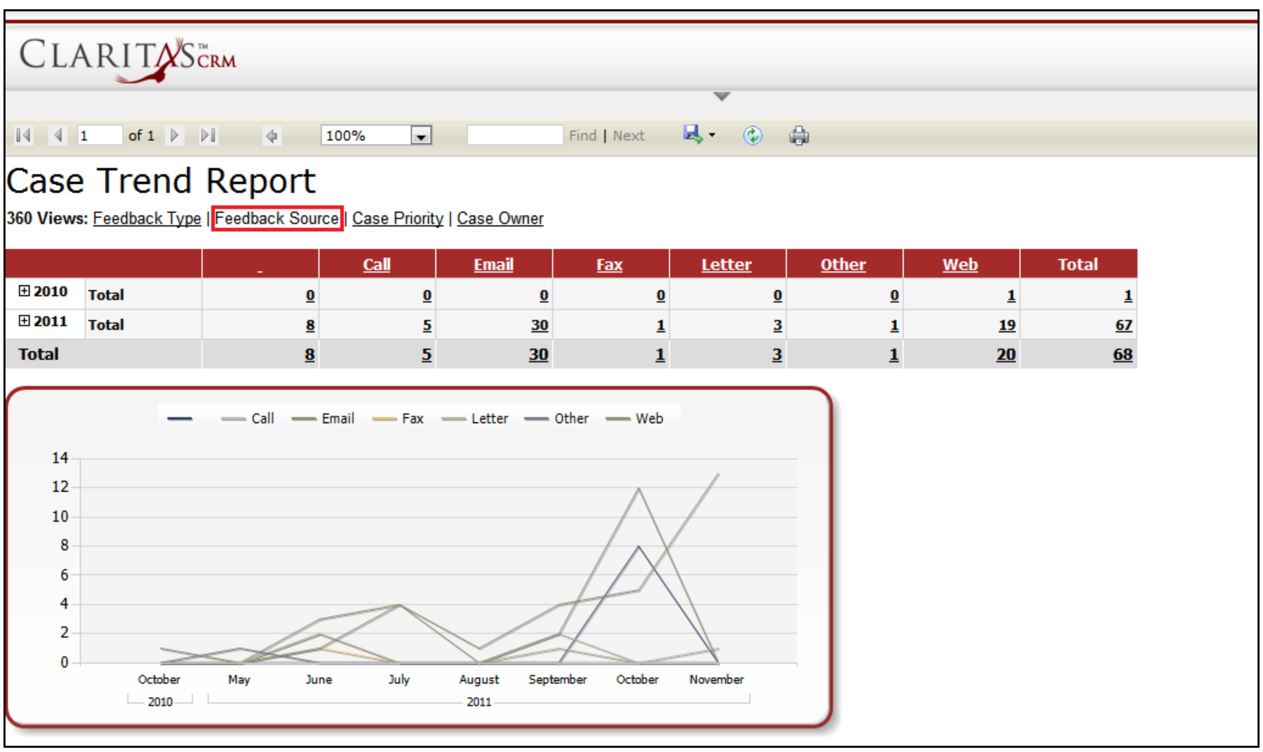
To view Case Trend Report based on Feedback Type, click at the Feedback Type hyperlink.



		_	Comment	Complaint	Compliment	Enquiry	Other	Suggestion	Total
⊞ 2010	Total	0	1	0	0	0	0	0	1
⊞ 2011	Total	17	14	26	4	4	1	1	67
Total		17	15	26	4	4	1	1	68

Figure 16.12: Case Trend Report (Feedback Type)

To view Case Trend Report based on Feedback Source, click at the Feedback Source hyperlink.



		_	Call	Email	Fax	Letter	Other	Web	Total
⊞ 2010	Total	0	0	0	0	0	0	1	1
⊞ 2011	Total	8	5	30	1	3	1	19	67
Total		8	5	30	1	3	1	20	68

Figure 16.13: Case Trend Report (Feedback Source)

To view Case Trend Report based on Case Priority, click at the Case Priority hyperlink.

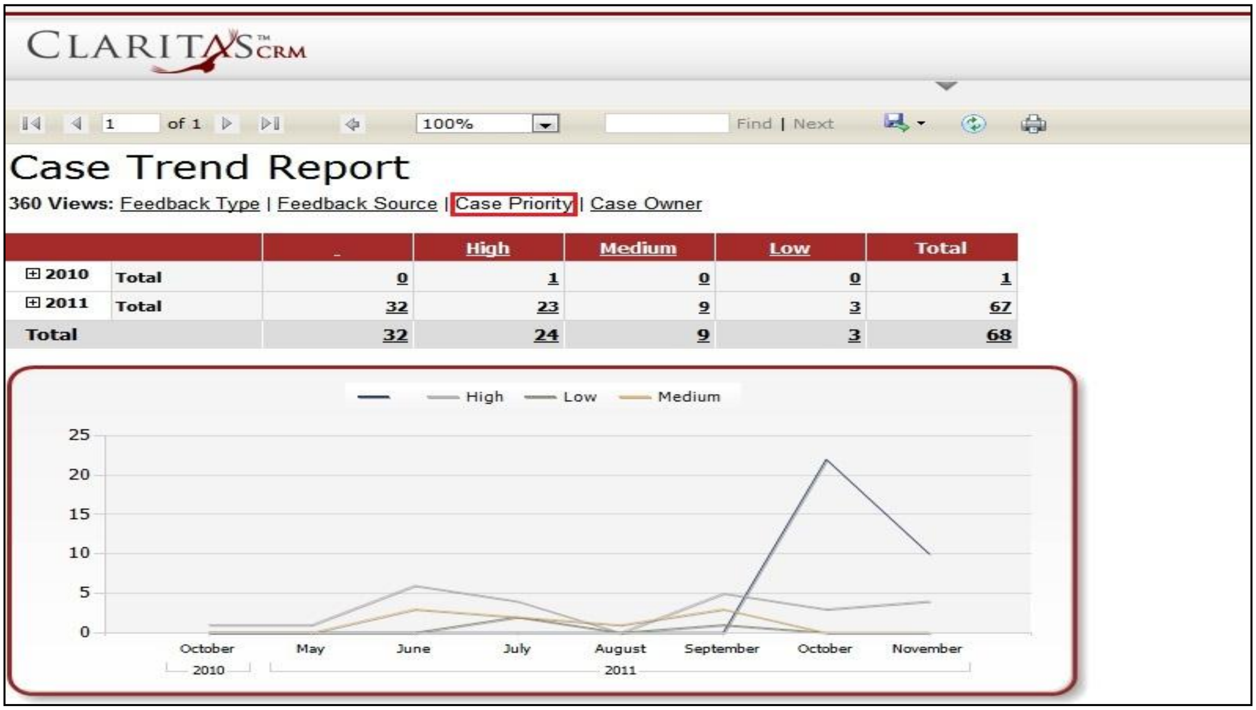


Figure 16.14: Case Trend Report (Case Priority)

User can also filter the record display by selecting the filters. Click at [dropdown arrow] and select the Field, Filter and Value. Then, click at the Refresh Report button. Page will refresh and display result based on the filter entered.

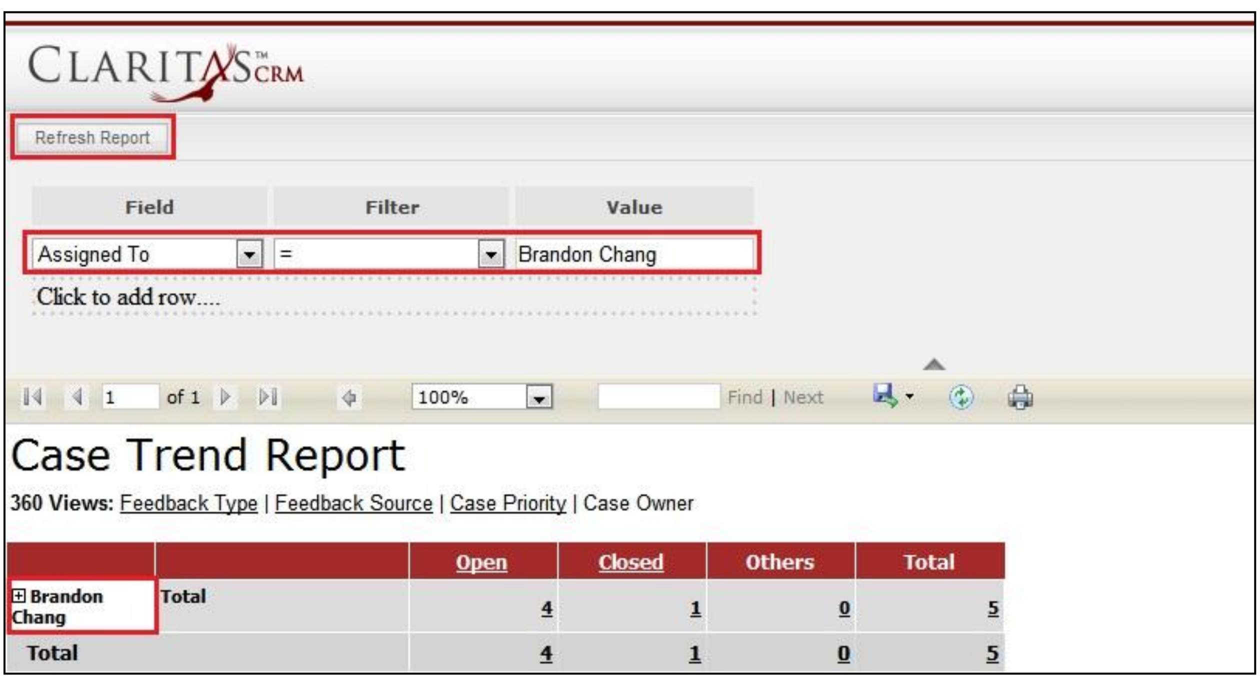


Figure 16.15: Filtered Case Trend Report

To go to the First Page of the report, click at the **First Page Image Icon** .

To go to the Previous Page of the report, click at the **Previous Page Image Icon** .

To go to the Next Page of the report, click at the **Next Page Image Icon** .

To go to the Last Page of the report, click at the **Last Page Image Icon** .

To find any keyword, type in the **keyword** (Example: **Case**) in the **Find textbox** and click **Find**.

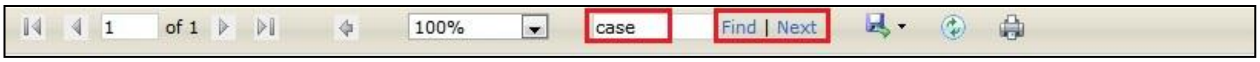


Figure 16.16: Find Textbox in Case Trend Report

To find next result of Case, click at the **Next** button.

To export the report to **Excel**, **PDF** or **Word**, click at the **Export Image Icon** and select the format of report to be exported as.

Figure 16.17: Export Case Trend Report

To refresh the report, click at the **Refresh Icon** . The page will refresh and report will reload.

To print the report, click at the **Print Icon** . A print window will pop up for user to check the setting before printing.

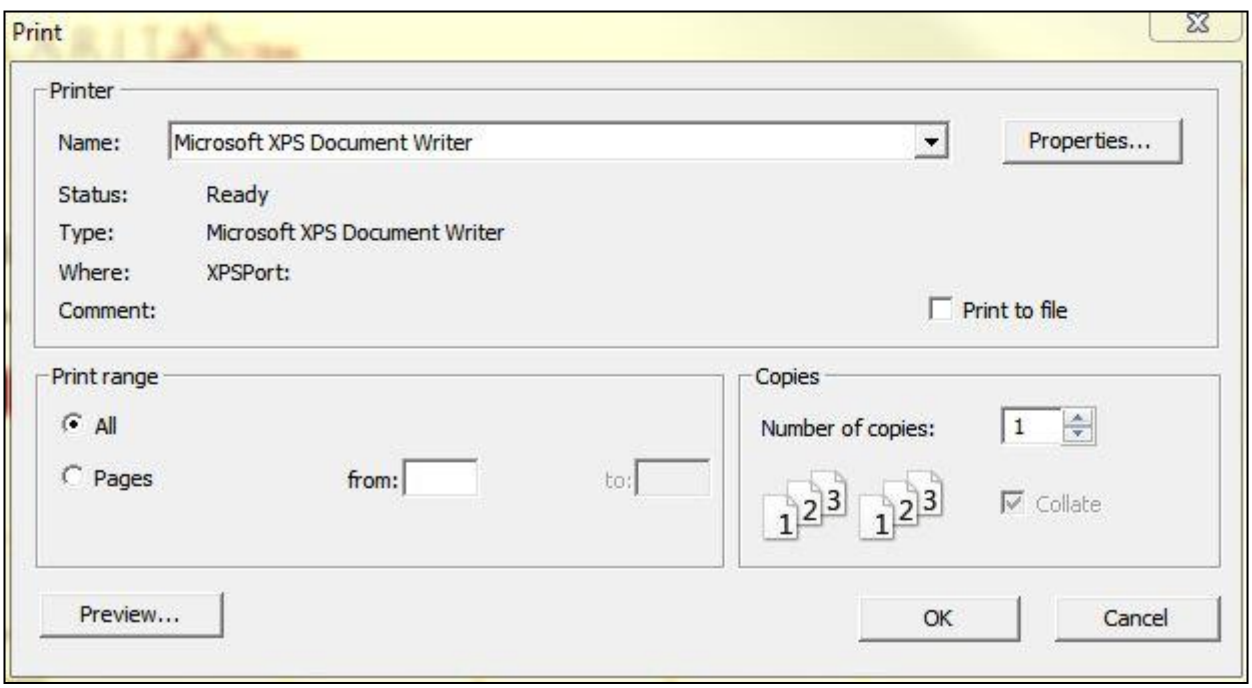


Figure 16.18: Print Popup

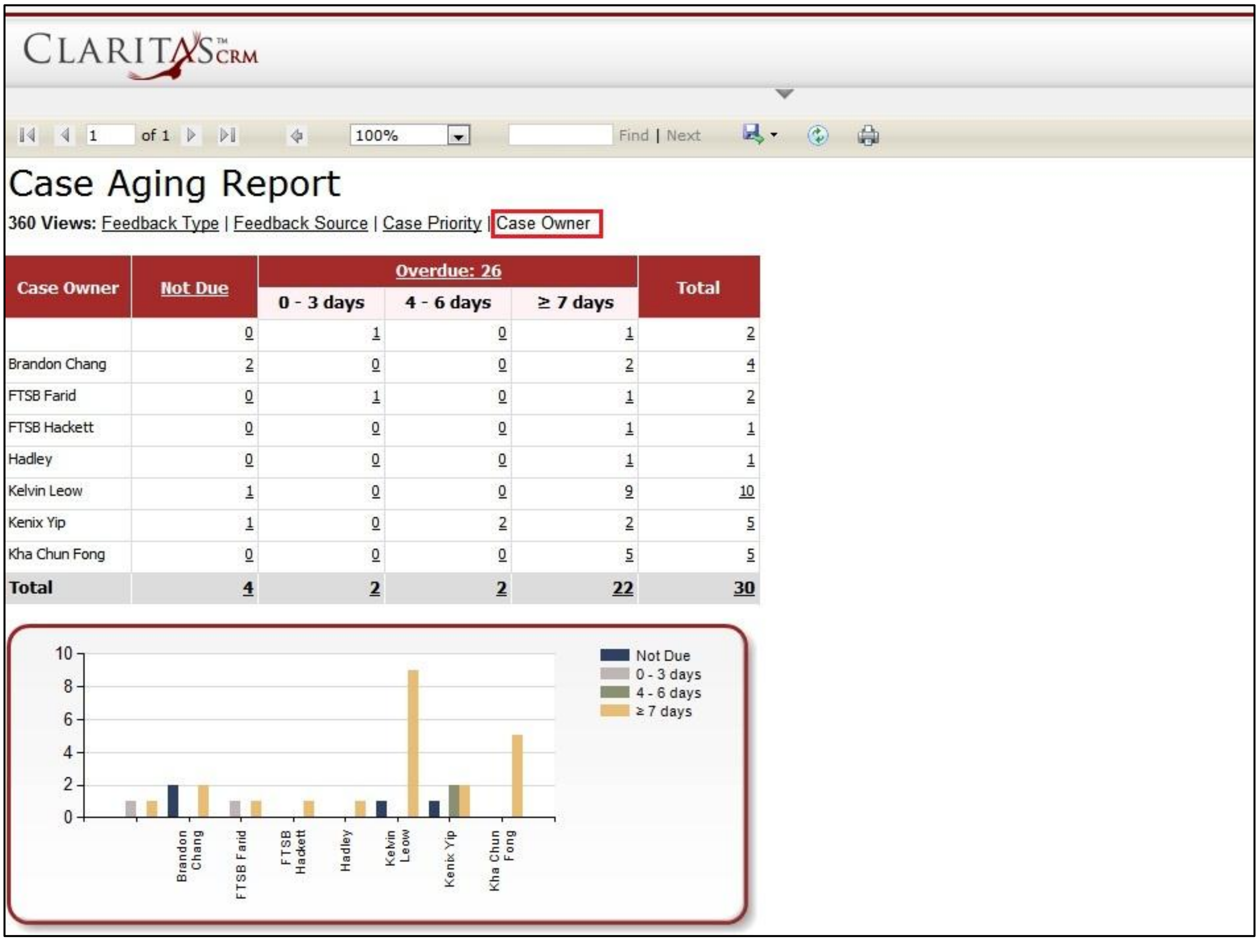
Case Aging Report

Click at **Report** menu at the Main Menu bar.

Figure 16.19: Report Menu in Main Menu

To view the **Case Aging Report**, click at the Case Report 03: Case Aging Summary hyperlink, Case Aging Report window will pop up.

The report shows the Case Aging Report based on Case Owner (default view).



Case Owner	Not Due	Overdue: 26			Total
		0 - 3 days	4 - 6 days	≥ 7 days	
	0	1	0	1	2
Brandon Chang	2	0	0	2	4
FTSB Farid	0	1	0	1	2
FTSB Hackett	0	0	0	1	1
Hadley	0	0	0	1	1
Kelvin Leow	1	0	0	9	10
Kenix Yip	1	0	2	2	5
Kha Chun Fong	0	0	0	5	5
Total	**4**	**2**	**2**	**22**	**30**

Figure 16.20: Case Aging Report (Case Owner)

To view Case Aging Report based on Feedback Type, click at the Feedback Type hyperlink.

CLARITAS CRM

Case Aging Report

360 Views: Feedback Type | Feedback Source | Case Priority | Case Owner

Case Type	Not Due	Overdue: 26			Total
		0 - 3 days	4 - 6 days	≥ 7 days	
Comment	1	2	0	6	9
Complaint	0	0	1	11	12
Compliment	1	0	1	2	4
Enquiry	0	0	0	3	3
Other	1	0	0	0	1
Suggestion	1	0	0	0	1
Total	4	2	2	22	30

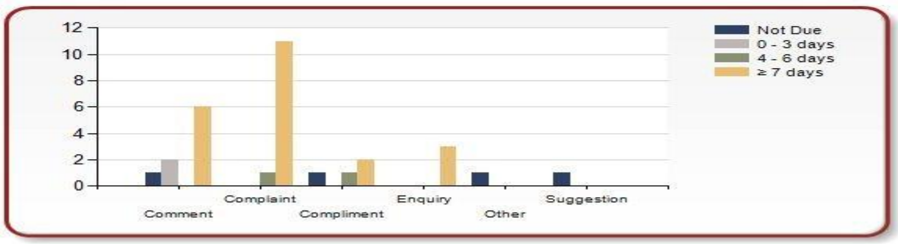


Figure 16.21: Case Aging Report (Feedback Type)

To view Case Aging Report based on Feedback Source, click at the Feedback Type hyperlink.

CLARITAS CRM

Case Aging Report

360 Views: Feedback Type | Feedback Source | Case Priority | Case Owner

Case Source	Not Due	Overdue: 26			Total
		0 - 3 days	4 - 6 days	≥ 7 days	
Call	1	1	1	1	4
Email	1	1	1	11	14
Letter	0	0	0	3	3
Other	0	0	0	1	1
Web	2	0	0	6	8
Total	4	2	2	22	30

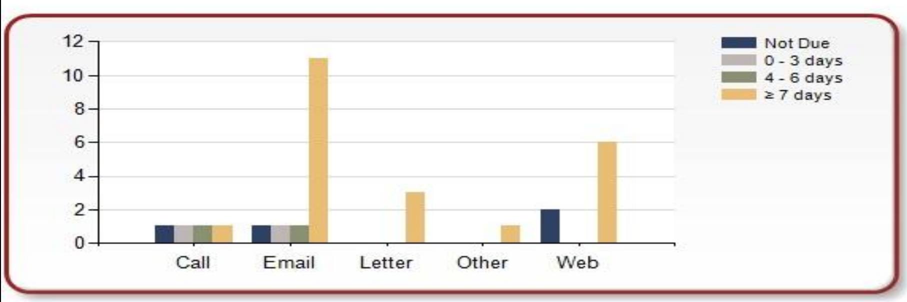
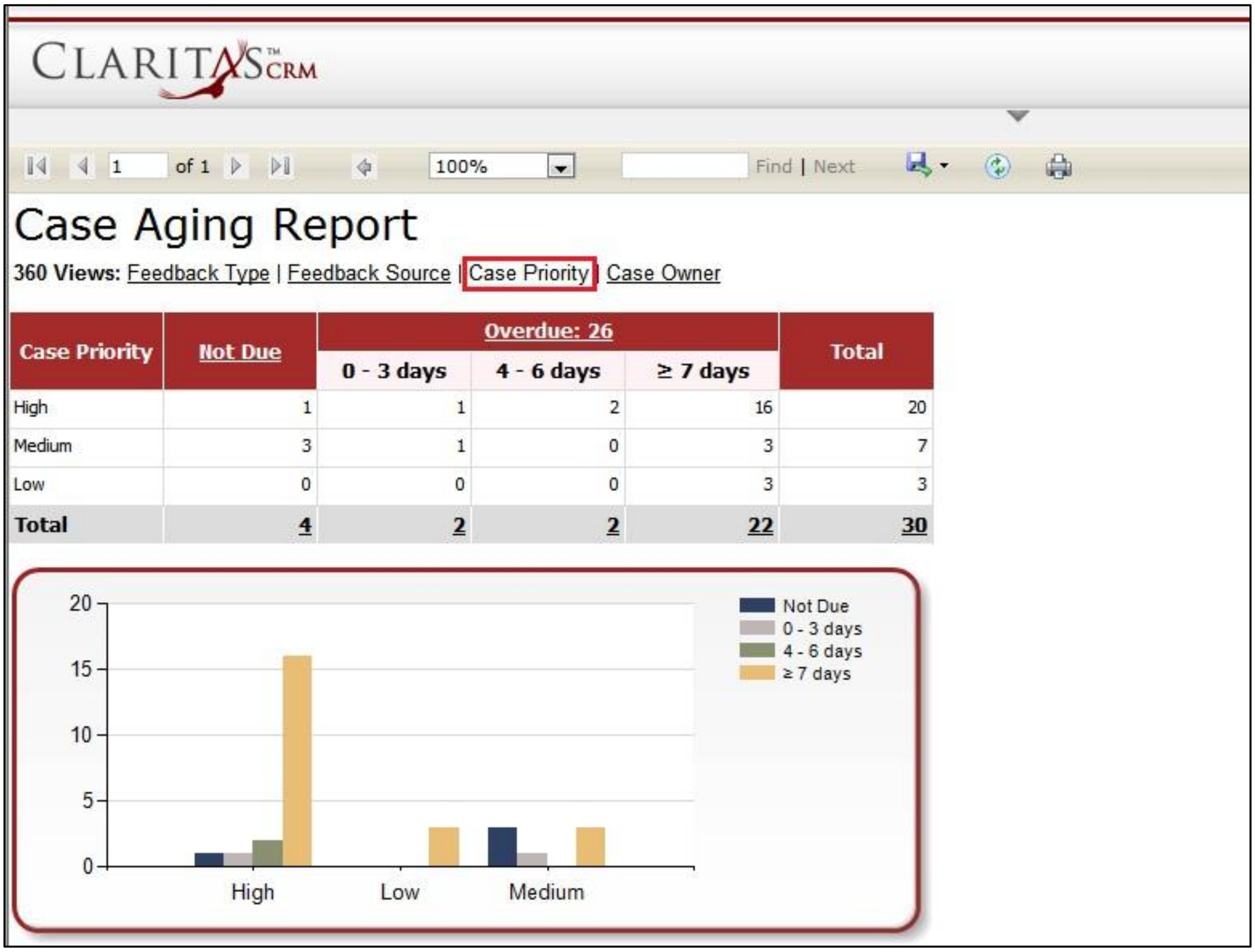


Figure 16.22: Case Aging Report (Feedback Source)

To view Case Aging Report based on Case Priority, click at the Feedback Type hyperlink.



Case Priority	Not Due	Overdue: 26			Total
		0 - 3 days	4 - 6 days	≥ 7 days	
High	1	1	2	16	20
Medium	3	1	0	3	7
Low	0	0	0	3	3
Total	4	2	2	22	30

Figure 16.23: Case Aging Report (Case Priority)

User can also filter the record display by selecting the filters. Click at and select the Field, Filter and Value. Then, click at the Refresh Report button. Page will refresh and display result based on the filter entered.

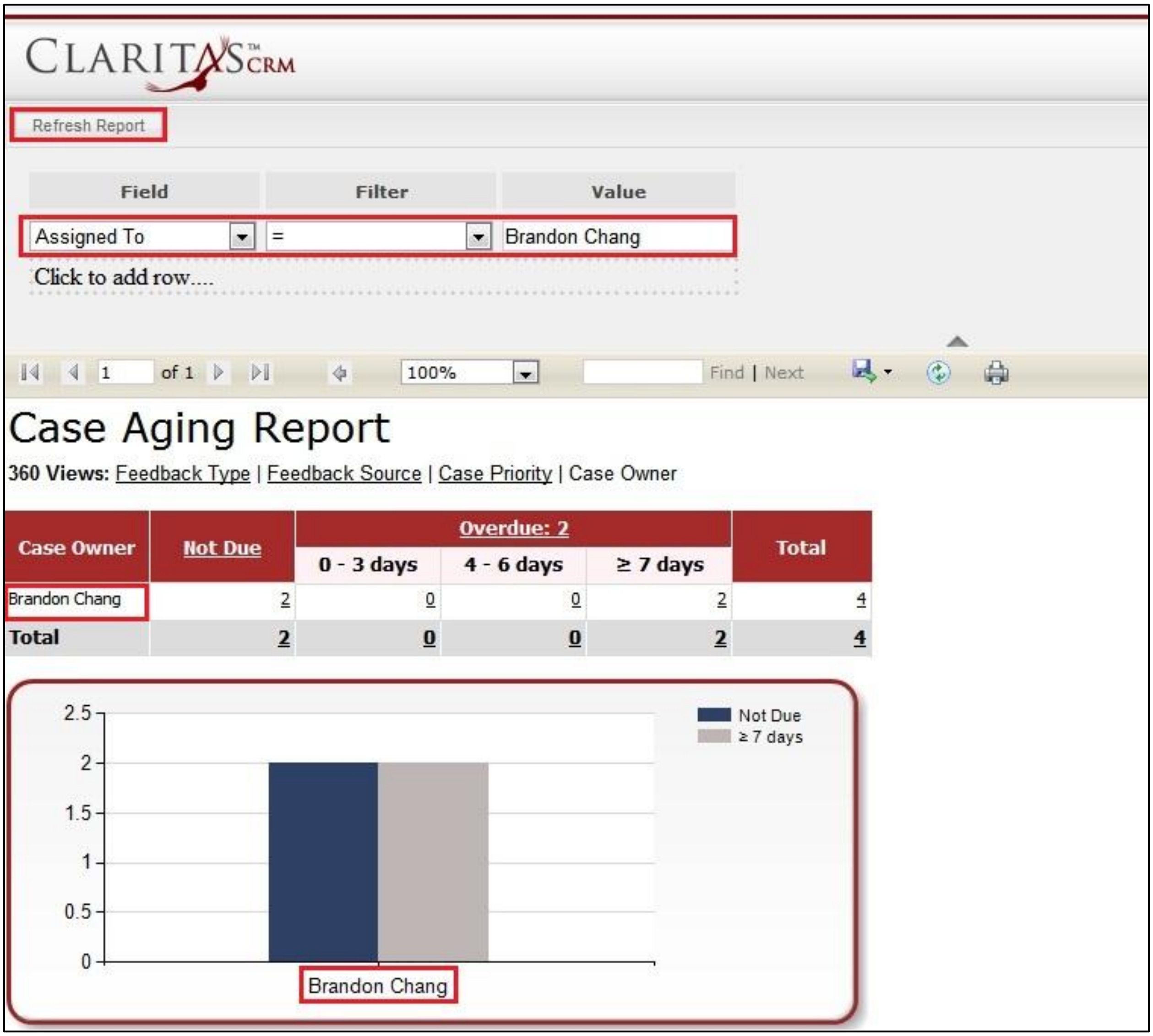


Figure 16.24: Filtered Case Aging Report

To go to the First Page of the report, click at the **First Page Image Icon** .

To go to the Previous Page of the report, click at the **Previous Page Image Icon** .

To go to the Next Page of the report, click at the **Next Page Image Icon** .

To go to the Last Page of the report, click at the **Last Page Image Icon** .

To find any keyword, type in the **keyword** (Example: **Case**) in the **Find textbox** and click **Find**.

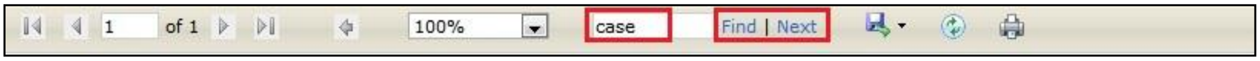


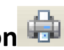
Figure 16.25: Find Textbox in Case Aging

To find next result of Case, click at the **Next** button.

To export the report to **Excel**, **PDF** or **Word**, click at the **Export Image Icon**  and select the format of report to be exported as.

Figure 16.26: Export Case Aging Report

To refresh the report, click at the **Refresh Icon** . The page will refresh and report will reload.

To print the report, click at the **Print Icon** . A print window will pop up for user to check the setting before printing.

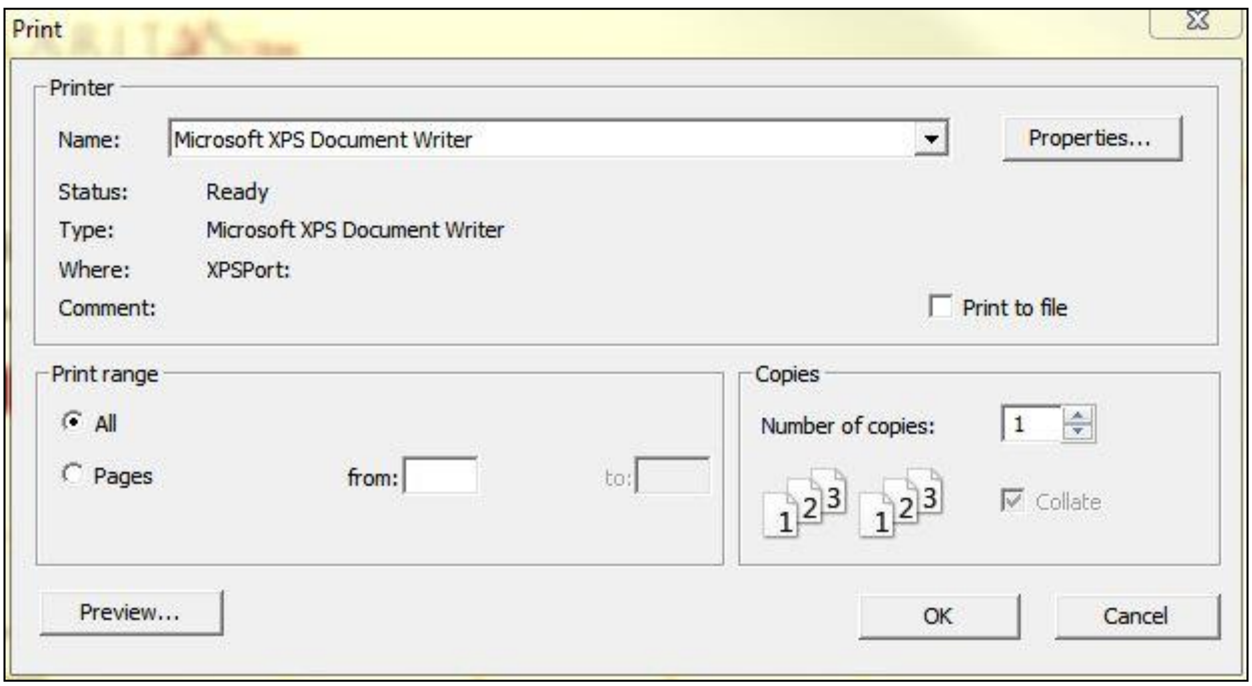


Figure 16.27: Print Popup

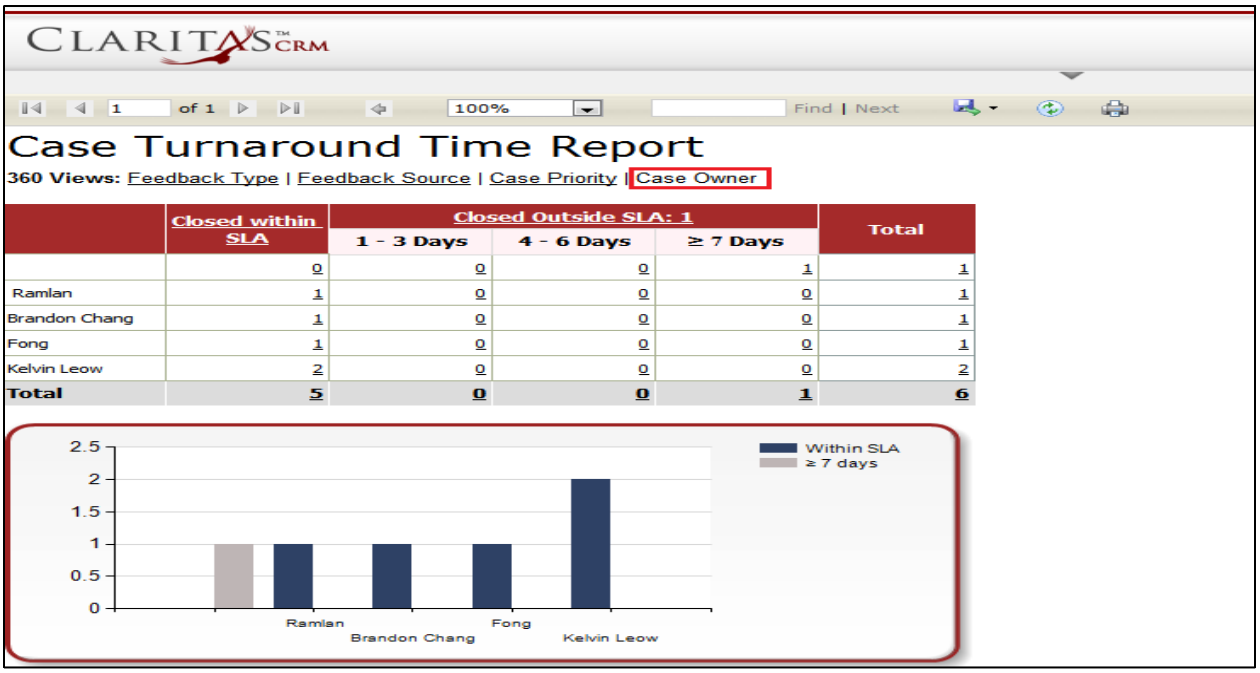
Case Turnaround Time Report

Click at **Report** menu at the Main Menu bar.

Figure 16.28: Report Menu in Main Menu

To view the **Case Turnaround Time Report**, click at the Case Report 04: Case Turnaround hyperlink, Case Turnaround Time Report window will pop up.

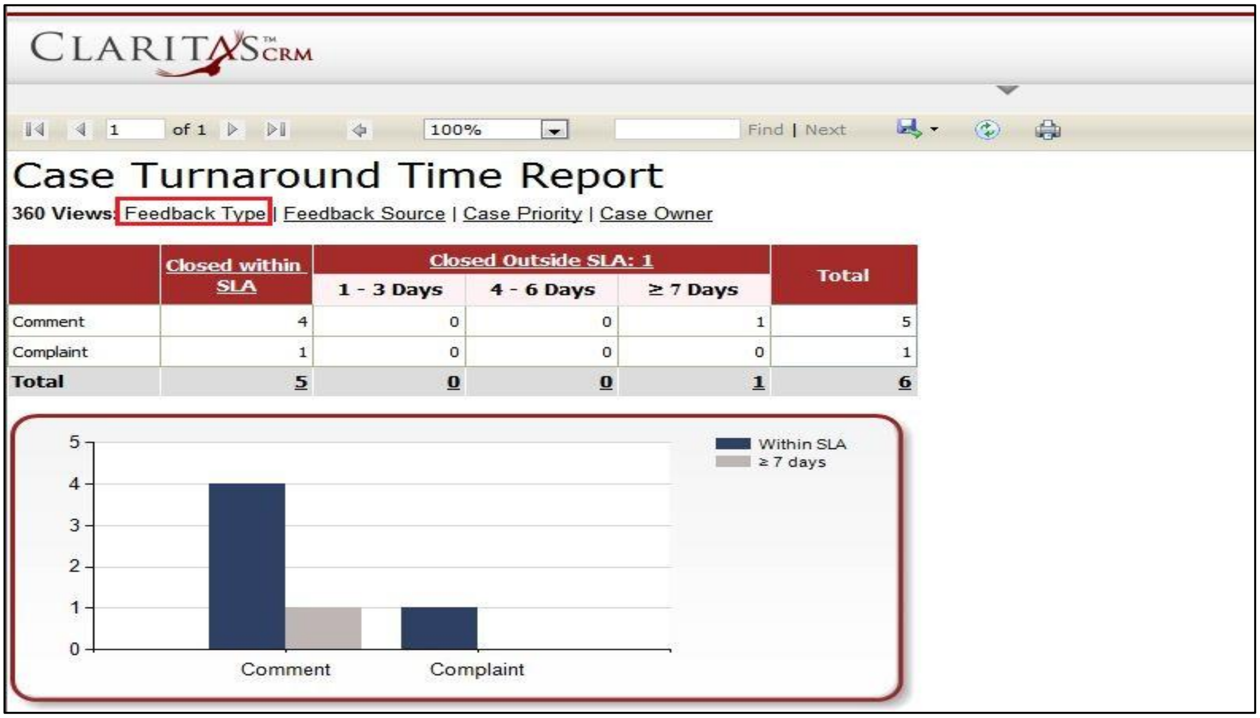
The report shows the Case Turnaround Time Report based on Case Owner (default view).



	Closed within SLA	Closed Outside SLA: 1			Total
		1 - 3 Days	4 - 6 Days	≥ 7 Days	
	0	0	0	1	1
Ramlan	1	0	0	0	1
Brandon Chang	1	0	0	0	1
Fong	1	0	0	0	1
Kelvin Leow	2	0	0	0	2
Total	**5**	**0**	**0**	**1**	**6**

Figure 16.29: Case Turnaround Time Report (Case Owner)

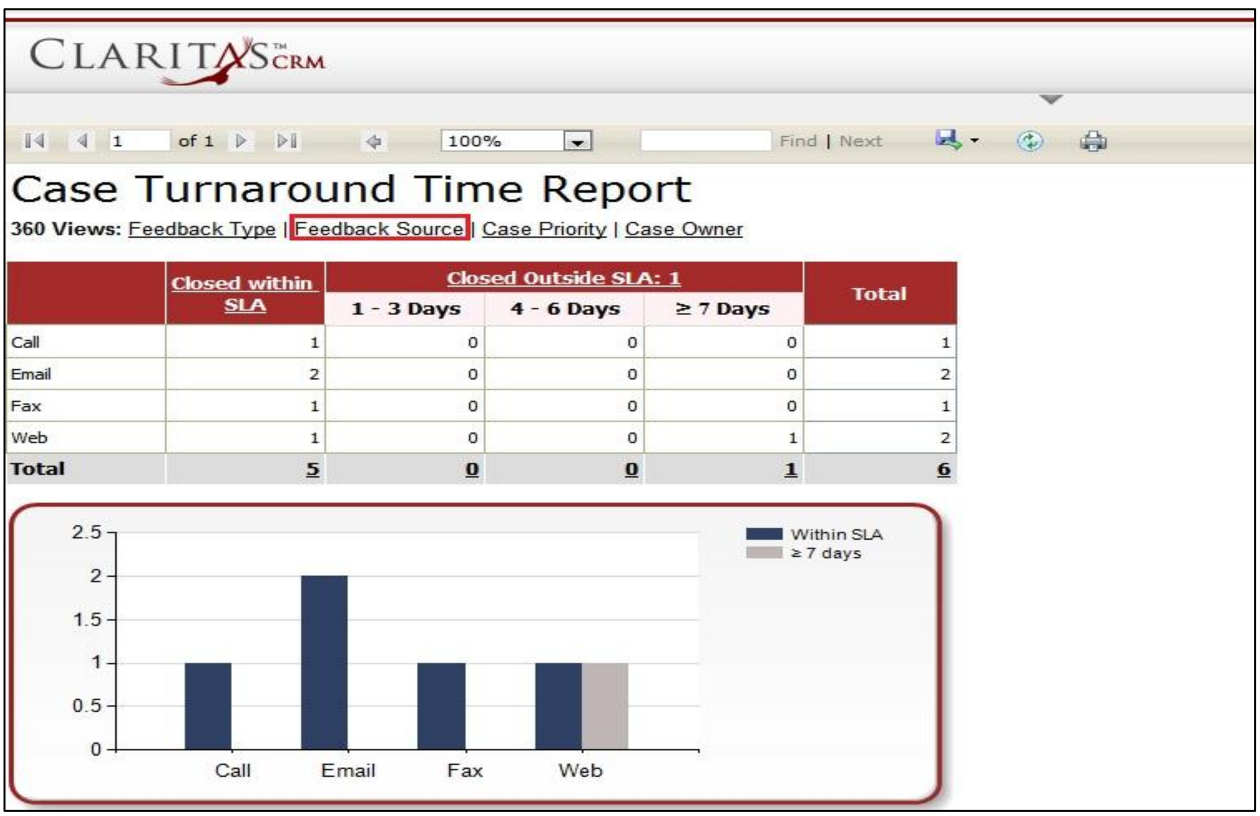
To view Case Turnaround Time Report based on Feedback Type, click at the Feedback Type hyperlink.



	Closed within SLA	Closed Outside SLA: 1			Total
		1 - 3 Days	4 - 6 Days	≥ 7 Days	
Comment	4	0	0	1	5
Complaint	1	0	0	0	1
Total	5	0	0	1	6

Figure 16.30: Case Turnaround Time Report (Feedback Type)

To view Case Turnaround Time Report based on Feedback Source, click at the Feedback Source hyperlink.



	Closed within SLA	Closed Outside SLA: 1			Total
		1 - 3 Days	4 - 6 Days	≥ 7 Days	
Call	1	0	0	0	1
Email	2	0	0	0	2
Fax	1	0	0	0	1
Web	1	0	0	1	2
Total	5	0	0	1	6

Figure 16.31: Case Turnaround (Feedback Source)

To view Case Turnaround Time Report based on Case Priority, click at the Case Priority hyperlink.

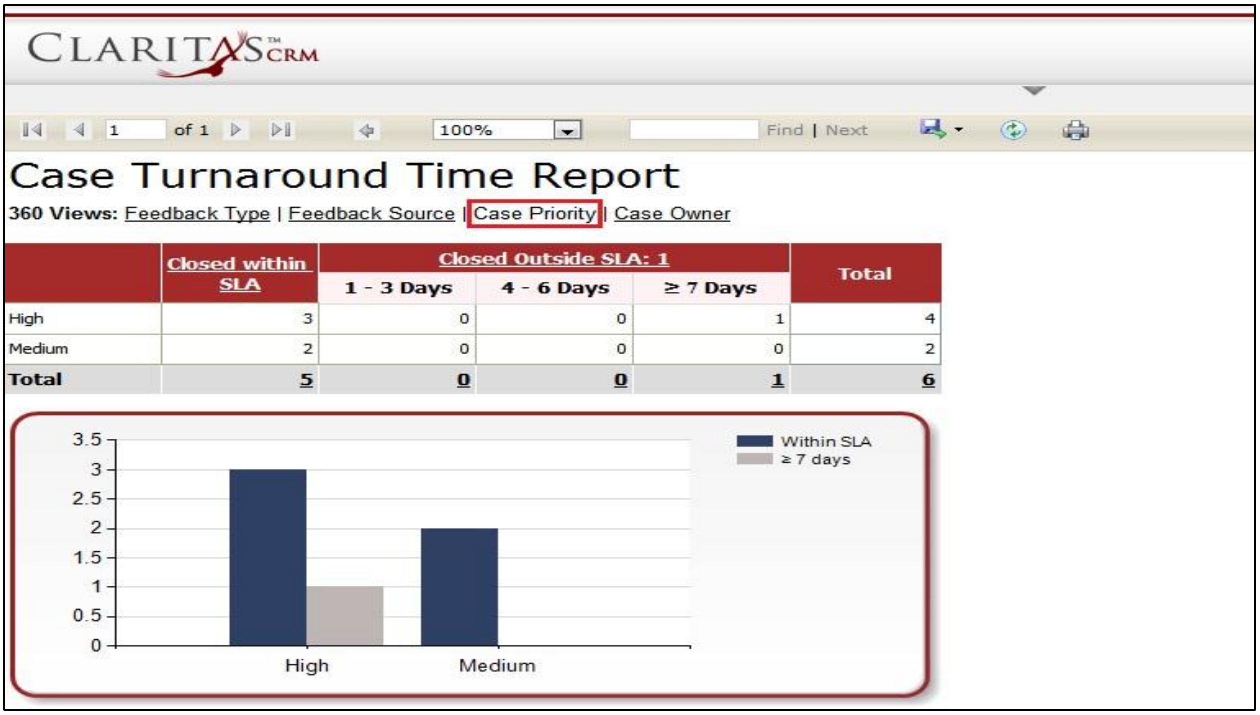


Figure 16.32: Case Turnaround (Case Priority)

User can also filter the record display by selecting the filters. Click at and select the Field, Filter and Value. Then, click at the Refresh Report button. Page will refresh and display result based on the filter entered.

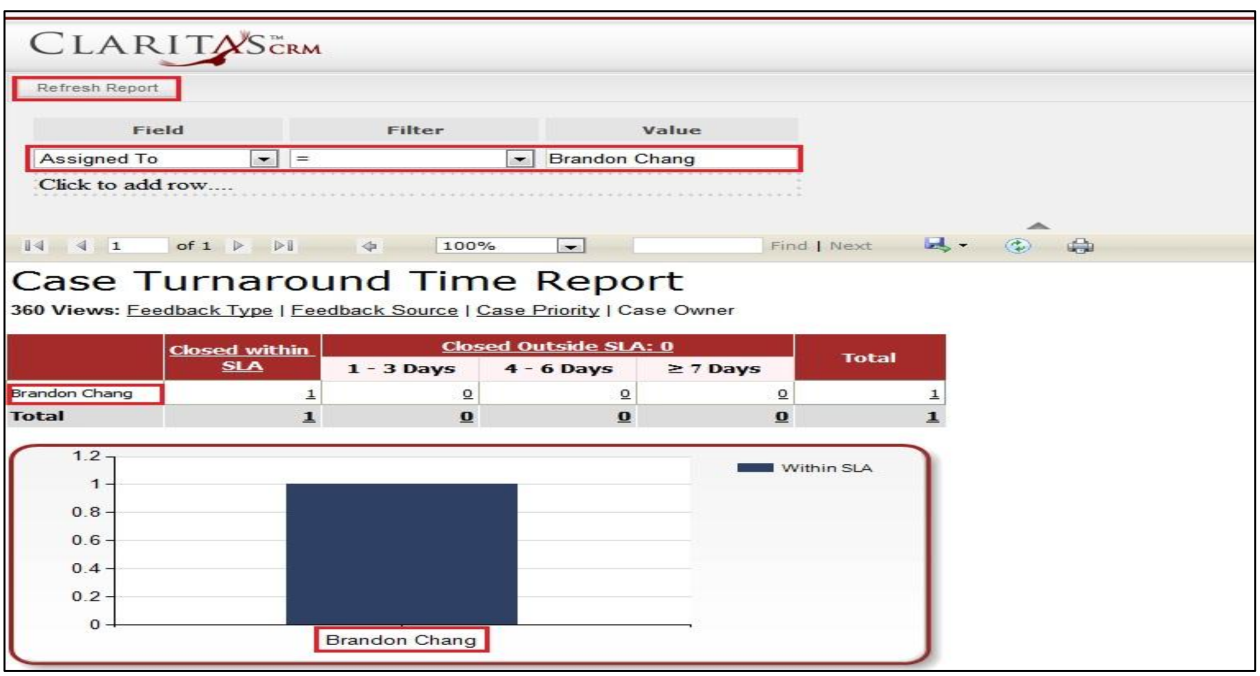


Figure 16.33: Filtered Case Turnaround Time Report

To go to the First Page of the report, click at the **First Page Image Icon**.

To go to the Previous Page of the report, click at the **Previous Page Image Icon**.

To go to the Next Page of the report, click at the **Next Page Image Icon**.

To go to the Last Page of the report, click at the **Last Page Image Icon**.

To find any keyword, type in the **keyword** (Example: **Case**) in the **Find textbox** and click **Find**.

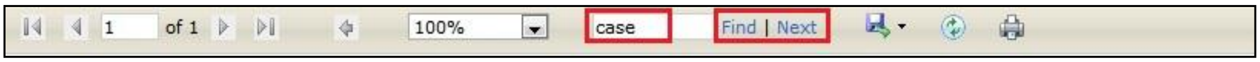


Figure 16.34: Find Textbox in Case Turnaround

To find next result of Case, click at the **Next** button.

To export the report to **Excel**, **PDF** or **Word**, click at the **Export Image Icon** and select the format of report to be exported as.

Figure 16.35: Export Case Turnaround Time Report

To refresh the report, click at the **Refresh Icon**. The page will refresh and report will reload.

To print the report, click at the **Print Icon**. A print window will pop up for user to check the setting before printing.

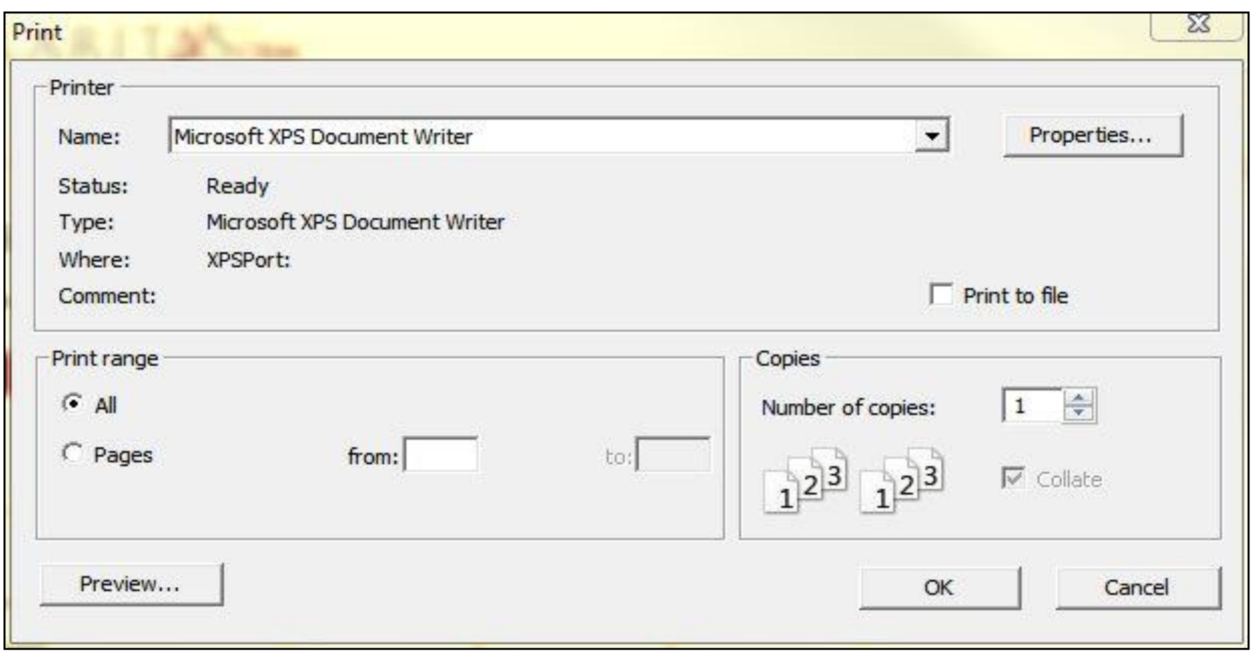


Figure 16.36: Print Popup

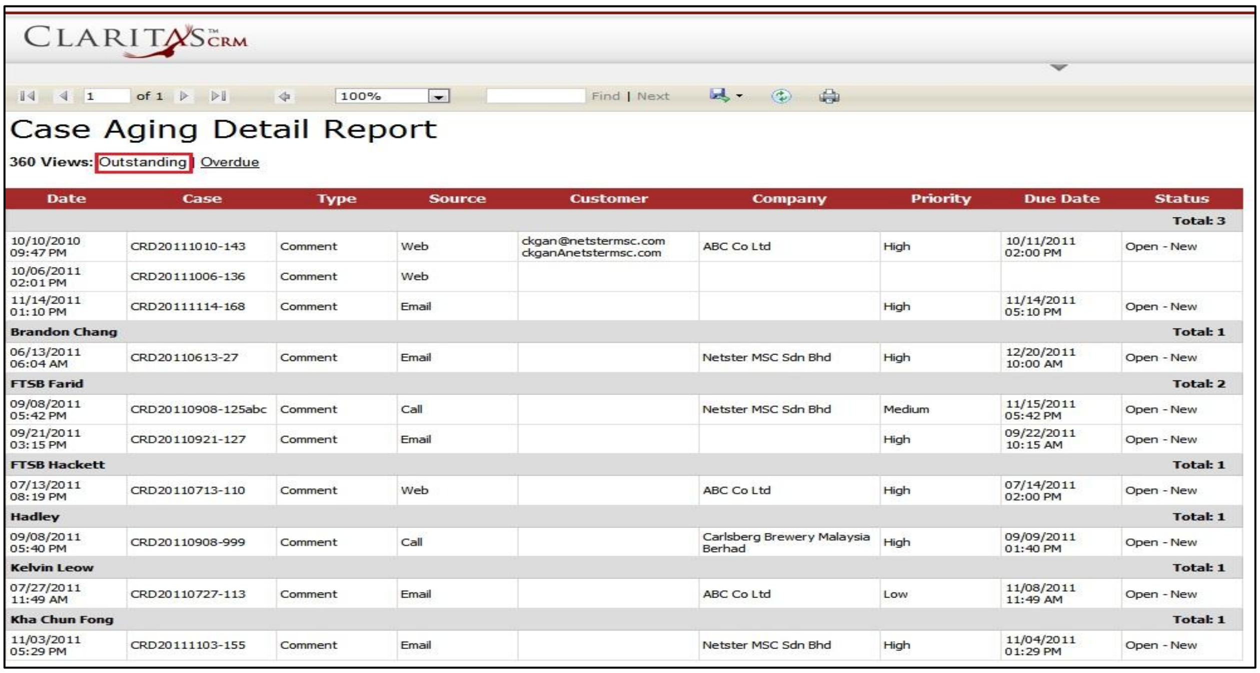
Case Aging Detail Report

Click at **Report** menu at the Main Menu bar.

Figure 16.37: Report Menu in Main Menu

To view the **Case Aging Detail Report**, click at the Case Report 05: Case Turnaround hyperlink, Case Aging Detail Report window will pop up.

The report shows the Case Aging Detail Report based on Outstanding Cases (default view).



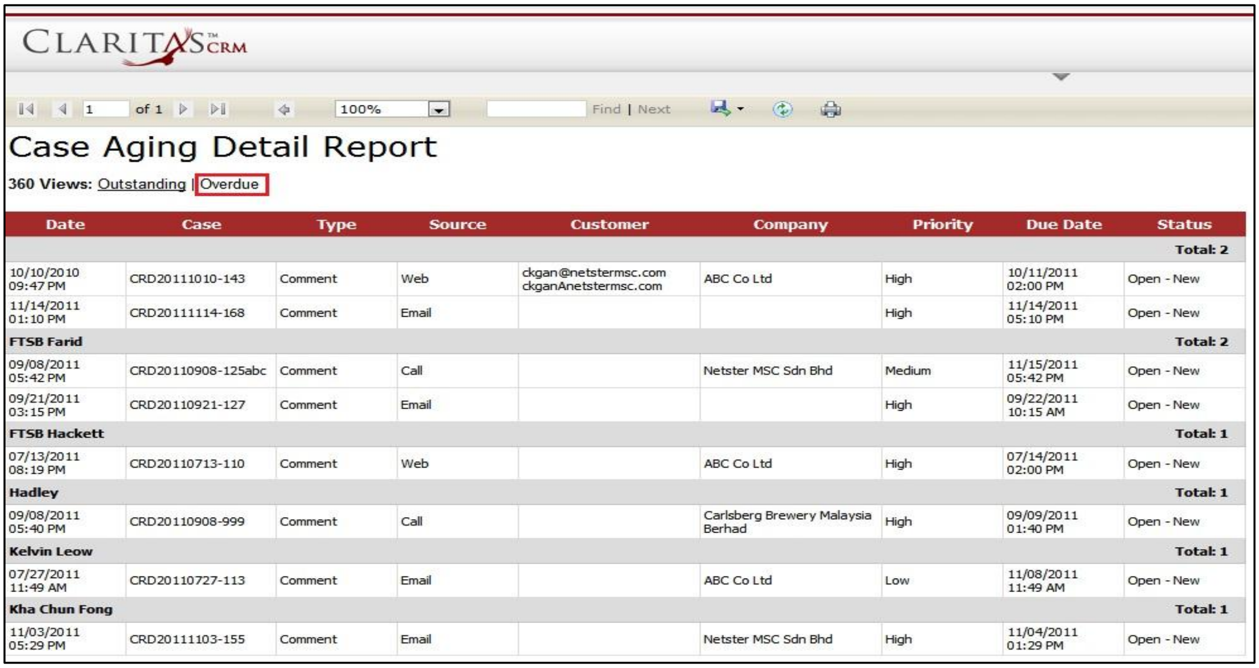
Case Aging Detail Report

360 Views: Outstanding | Overdue

Date	Case	Type	Source	Customer	Company	Priority	Due Date	Status
								Total: 3
10/10/2010 09:47 PM	CRD20111010-143	Comment	Web	ckgan@netstermsc.com ckganAnetstermsc.com	ABC Co Ltd	High	10/11/2011 02:00 PM	Open - New
10/06/2011 02:01 PM	CRD20111006-136	Comment	Web					
11/14/2011 01:10 PM	CRD20111114-168	Comment	Email			High	11/14/2011 05:10 PM	Open - New
Brandon Chang								**Total: 1**
06/13/2011 06:04 AM	CRD20110613-27	Comment	Email		Netster MSC Sdn Bhd	High	12/20/2011 10:00 AM	Open - New
FTSB Farid								**Total: 2**
09/08/2011 05:42 PM	CRD20110908-125abc	Comment	Call		Netster MSC Sdn Bhd	Medium	11/15/2011 05:42 PM	Open - New
09/21/2011 03:15 PM	CRD20110921-127	Comment	Email			High	09/22/2011 10:15 AM	Open - New
FTSB Hackett								**Total: 1**
07/13/2011 08:19 PM	CRD20110713-110	Comment	Web		ABC Co Ltd	High	07/14/2011 02:00 PM	Open - New
Hadley								**Total: 1**
09/08/2011 05:40 PM	CRD20110908-999	Comment	Call		Carlsberg Brewery Malaysia Berhad	High	09/09/2011 01:40 PM	Open - New
Kelvin Leow								**Total: 1**
07/27/2011 11:49 AM	CRD20110727-113	Comment	Email		ABC Co Ltd	Low	11/08/2011 11:49 AM	Open - New
Kha Chun Fong								**Total: 1**
11/03/2011 05:29 PM	CRD20111103-155	Comment	Email		Netster MSC Sdn Bhd	High	11/04/2011 01:29 PM	Open - New

Figure 16.38: Case Aging Detail Report (Outstanding Cases)

To view Case Aging Detail Report based on Overdue Cases, click at the Overdue hyperlink.



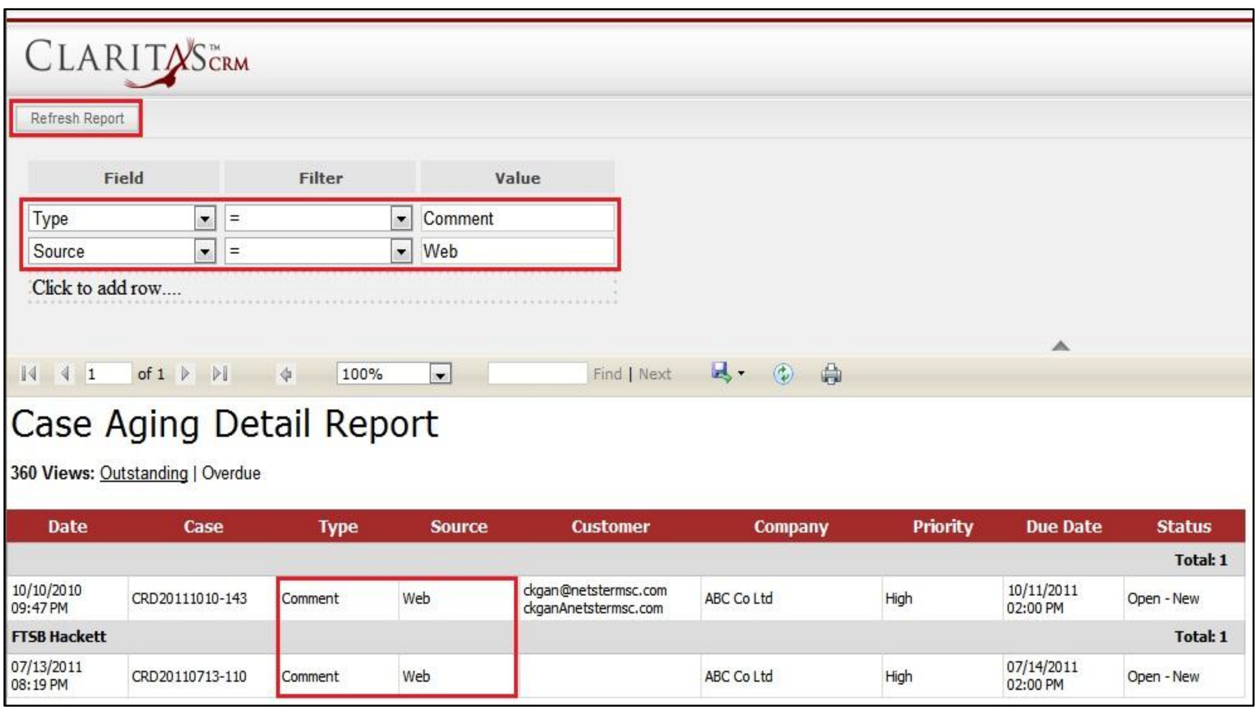
Case Aging Detail Report

360 Views: Outstanding | Overdue

Date	Case	Type	Source	Customer	Company	Priority	Due Date	Status
								Total: 2
10/10/2010 09:47 PM	CRD20111010-143	Comment	Web	ckgan@netstermsc.com ckganAnetstermsc.com	ABC Co Ltd	High	10/11/2011 02:00 PM	Open - New
11/14/2011 01:10 PM	CRD20111114-168	Comment	Email			High	11/14/2011 05:10 PM	Open - New
FTSB Farid								Total: 2
09/08/2011 05:42 PM	CRD20110908-125abc	Comment	Call		Netster MSC Sdn Bhd	Medium	11/15/2011 05:42 PM	Open - New
09/21/2011 03:15 PM	CRD20110921-127	Comment	Email			High	09/22/2011 10:15 AM	Open - New
FTSB Hackett								Total: 1
07/13/2011 08:19 PM	CRD20110713-110	Comment	Web		ABC Co Ltd	High	07/14/2011 02:00 PM	Open - New
Hadley								Total: 1
09/08/2011 05:40 PM	CRD20110908-999	Comment	Call		Carlsberg Brewery Malaysia Berhad	High	09/09/2011 01:40 PM	Open - New
Kelvin Leow								Total: 1
07/27/2011 11:49 AM	CRD20110727-113	Comment	Email		ABC Co Ltd	Low	11/08/2011 11:49 AM	Open - New
Kha Chun Fong								Total: 1
11/03/2011 05:29 PM	CRD20111103-155	Comment	Email		Netster MSC Sdn Bhd	High	11/04/2011 01:29 PM	Open - New

Figure 16.39: Case Aging Detail Report (Overdue Cases)

User can also filter the record display by selecting the filters. Click at and select the Field, Filter and Value. Then, click at the Refresh Report button. Page will refresh and display result based on the filter entered.



Field	Filter	Value
Type	=	Comment
Source	=	Web

Case Aging Detail Report

360 Views: Outstanding | Overdue

Date	Case	Type	Source	Customer	Company	Priority	Due Date	Status
								Total: 1
10/10/2010 09:47 PM	CRD20111010-143	Comment	Web	ckgan@netstermsc.com ckganAnetstermsc.com	ABC Co Ltd	High	10/11/2011 02:00 PM	Open - New
FTSB Hackett								Total: 1
07/13/2011 08:19 PM	CRD20110713-110	Comment	Web		ABC Co Ltd	High	07/14/2011 02:00 PM	Open - New

Figure 16.40: Filtered Case Aging Detail Report

To go to the First Page of the report, click at the **First Page Image Icon** .

To go to the Previous Page of the report, click at the **Previous Page Image Icon** .

To go to the Next Page of the report, click at the **Next Page Image Icon** .

To go to the Last Page of the report, click at the **Last Page Image Icon** .

To find any keyword, type in the **keyword** (Example: **Case**) in the **Find textbox** and click **Find**.

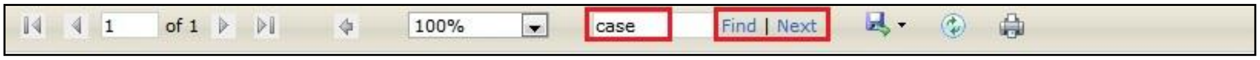


Figure 16.41: Find Textbox in Case Turnaround

To find next result of Case, click at the **Next** button.

To export the report to **Excel**, **PDF** or **Word**, click at the **Export Image Icon** and select the format of report to be exported as.

Figure 16.42: Export Case Aging Detail Report

To refresh the report, click at the **Refresh Icon** . The page will refresh and report will reload.

To print the report, click at the **Print Icon** . A print window will pop up for user to check the setting before printing.

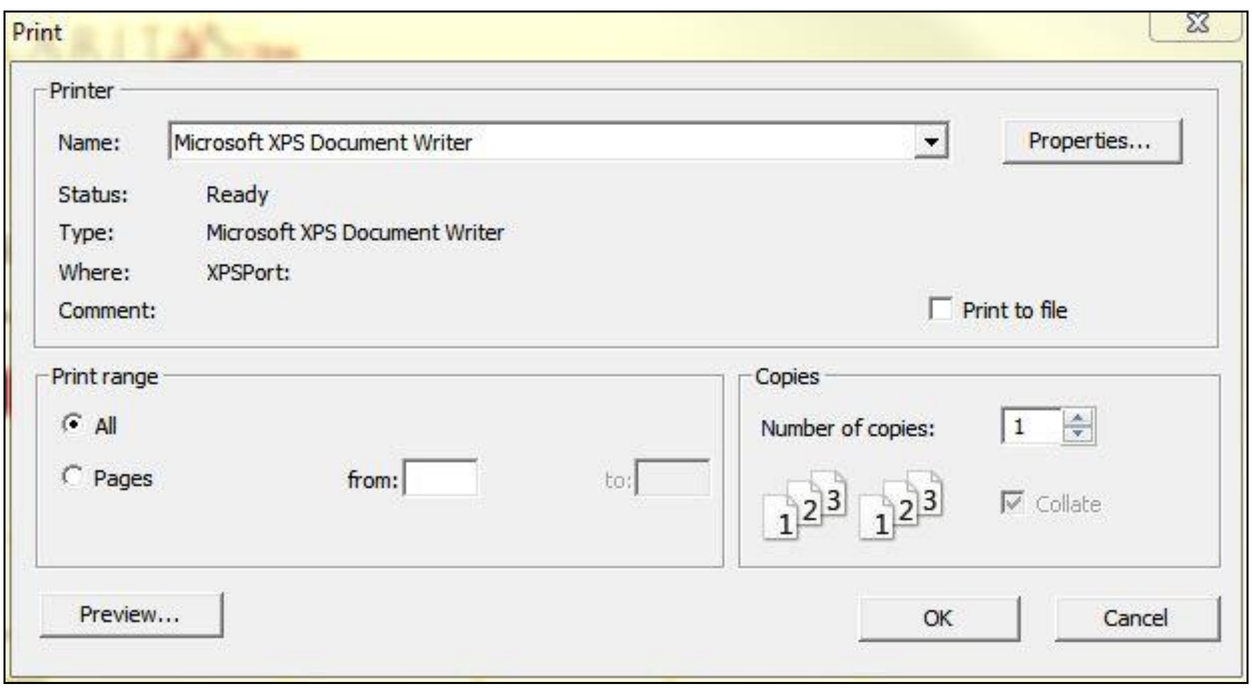


Figure 16.43: Print Popup

Contact Report

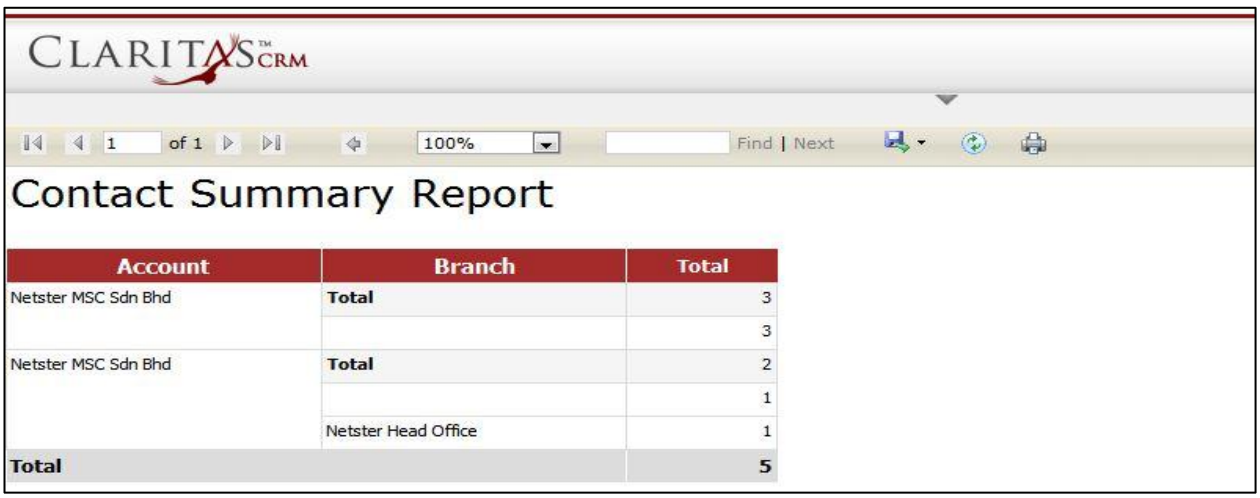
Contact Summary Report

Click at **Report** menu at the Main Menu bar.

Figure 16.44: Report Menu in Main Menu

To view the **Contact Summary Report**, click at the <u>Contact Report 01: Contact Summary</u> hyperlink, Contact Summary Report window will pop up.

The report shows the Contact Summary Report of all Contacts available.



Contact Summary Report

Account	Branch	Total
Netster MSC Sdn Bhd	**Total**	3
		3
Netster MSC Sdn Bhd	**Total**	2
		1
	Netster Head Office	1
Total		**5**

Figure 16.45: Contact Summary Report (Outstanding Cases)

User can also filter the record display by selecting the filters. Click at and select the Field, Filter and Value. Then, click at the Refresh Report button. Page will refresh and display result based on the filter entered.

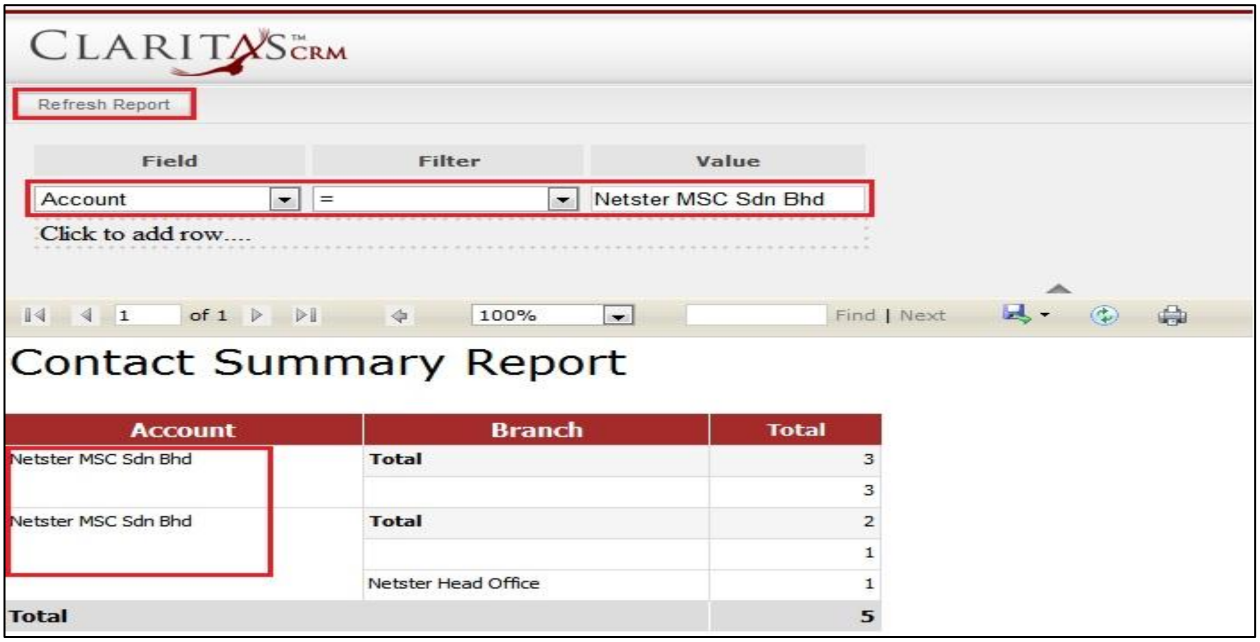


Figure 16.46: Filtered Contact Summary Report

To go to the First Page of the report, click at the **First Page Image Icon** .

To go to the Previous Page of the report, click at the **Previous Page Image Icon** .

To go to the Next Page of the report, click at the **Next Page Image Icon** .

To go to the Last Page of the report, click at the **Last Page Image Icon** .

To find any keyword, type in the **keyword** (Example: **Contact**) in the **Find textbox** and click **Find**.

Figure 16.47: Find Textbox in Contact Summary Report

To find next result of Contact, click at the **Next** button.

To export the report to **Excel**, **PDF** or **Word**, click at the **Export Image Icon** and select the format of report to be exported as.

Figure 16.48: Export Contact Summary Report

To refresh the report, click at the **Refresh Icon**. The page will refresh and report will reload.

To print the report, click at the **Print Icon**. A print window will pop up for user to check the setting before printing.

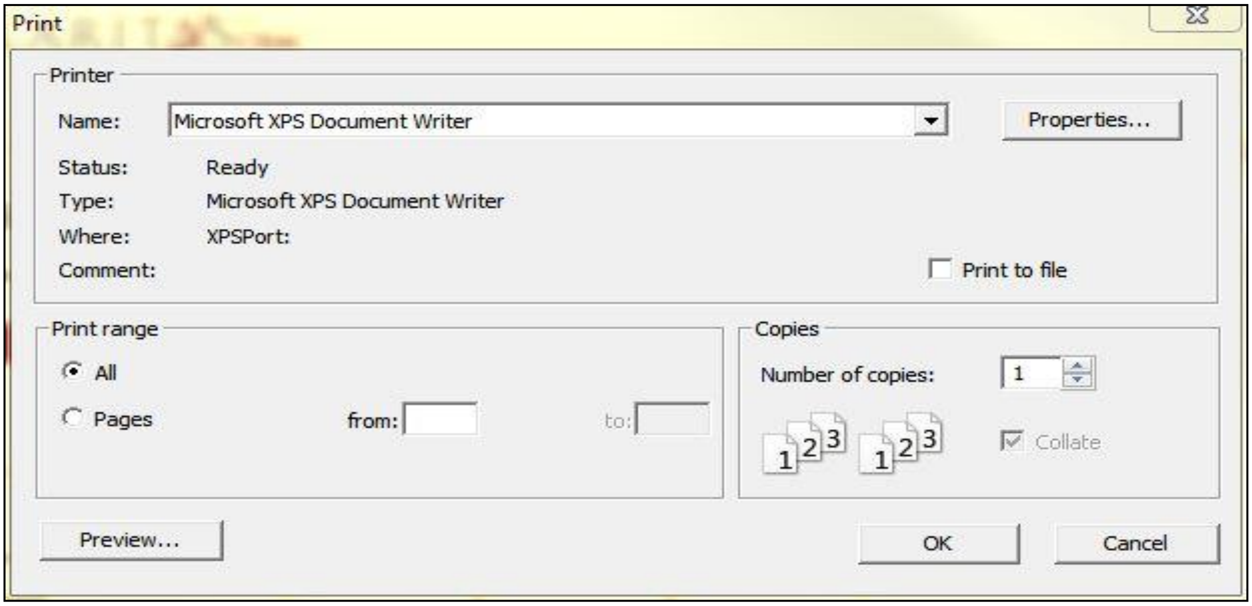


Figure 16.49: Print Popup

Issue Report

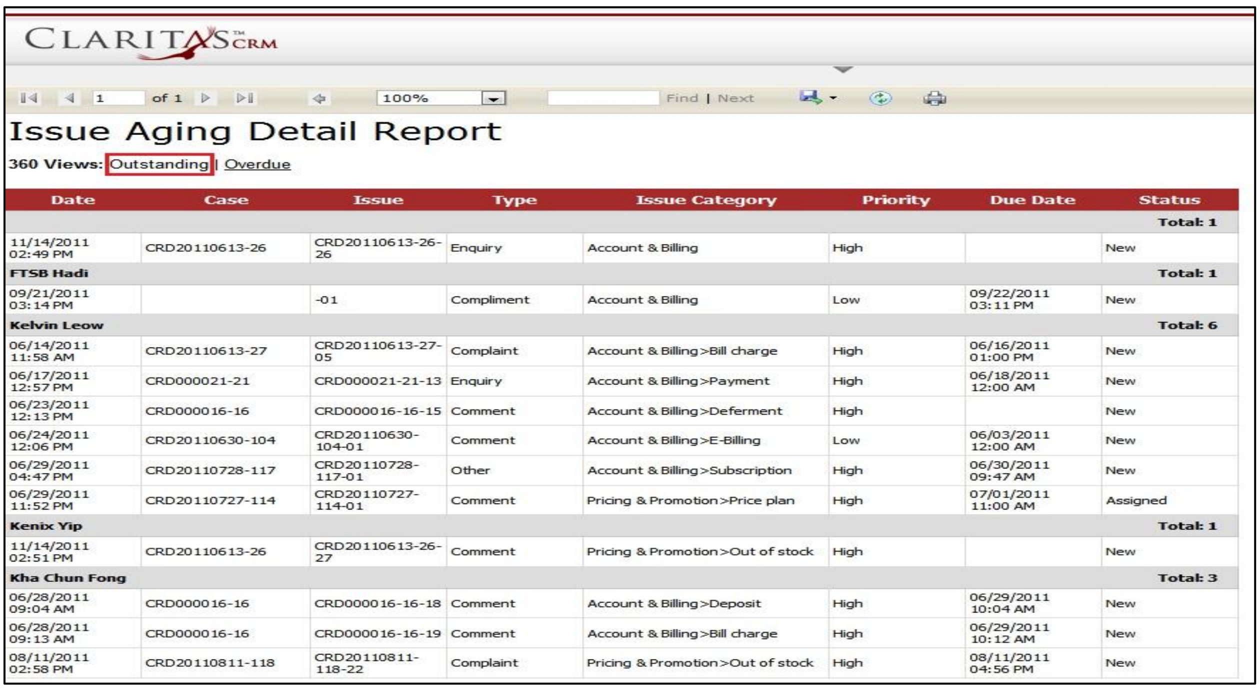
Issue Aging Detail Report

Click at **Report** menu at the Main Menu bar.

Figure 16.50: Report Menu in Main Menu

To view the **Issue Aging Detail Report**, click at the Issue Report 01: Issue Aging Detail hyperlink, Issue Aging Detail Report window will pop up.

The report shows the Issue Aging Detail Report of all available Cases.



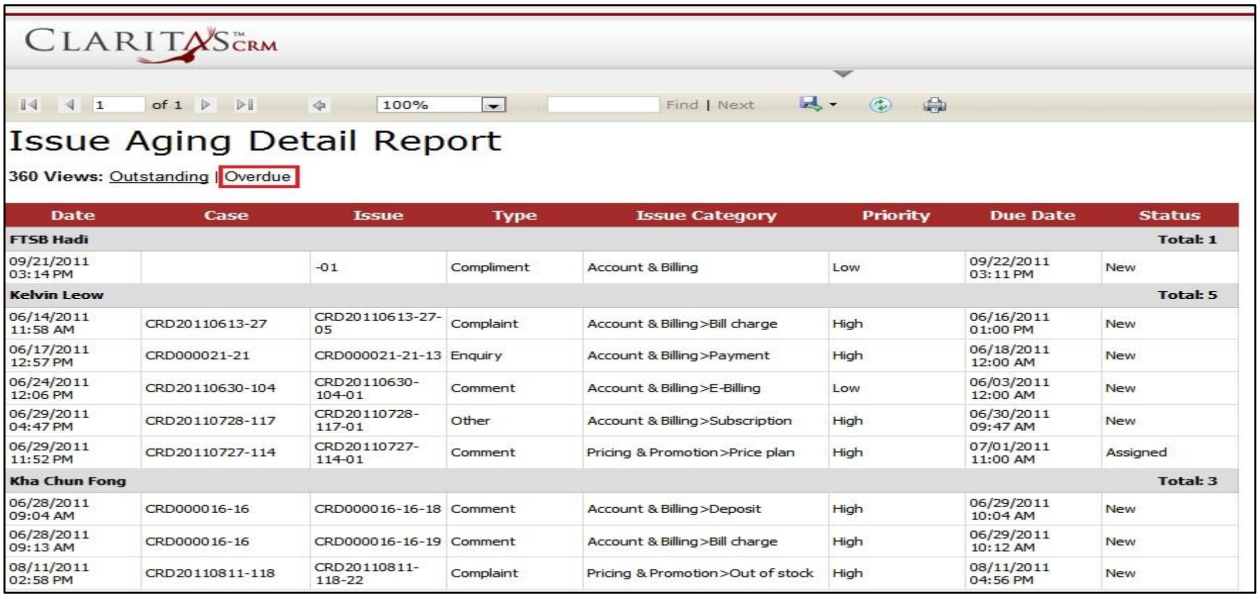
Issue Aging Detail Report

360 Views: Outstanding | Overdue

Date	Case	Issue	Type	Issue Category	Priority	Due Date	Status
							Total: 1
11/14/2011 02:49 PM	CRD20110613-26	CRD20110613-26-26	Enquiry	Account & Billing	High		New
FTSB Hadi							Total: 1
09/21/2011 03:14 PM		-01	Compliment	Account & Billing	Low	09/22/2011 03:11 PM	New
Kelvin Leow							Total: 6
06/14/2011 11:58 AM	CRD20110613-27	CRD20110613-27-05	Complaint	Account & Billing>Bill charge	High	06/16/2011 01:00 PM	New
06/17/2011 12:57 PM	CRD000021-21	CRD000021-21-13	Enquiry	Account & Billing>Payment	High	06/18/2011 12:00 AM	New
06/23/2011 12:13 PM	CRD000016-16	CRD000016-16-15	Comment	Account & Billing>Deferment	High		New
06/24/2011 12:06 PM	CRD20110630-104	CRD20110630-104-01	Comment	Account & Billing>E-Billing	Low	06/03/2011 12:00 AM	New
06/29/2011 04:47 PM	CRD20110728-117	CRD20110728-117-01	Other	Account & Billing>Subscription	High	06/30/2011 09:47 AM	New
06/29/2011 11:52 PM	CRD20110727-114	CRD20110727-114-01	Comment	Pricing & Promotion>Price plan	High	07/01/2011 11:00 AM	Assigned
Kenix Yip							Total: 1
11/14/2011 02:51 PM	CRD20110613-26	CRD20110613-26-27	Comment	Pricing & Promotion>Out of stock	High		New
Kha Chun Fong							Total: 3
06/28/2011 09:04 AM	CRD000016-16	CRD000016-16-18	Comment	Account & Billing>Deposit	High	06/29/2011 10:04 AM	New
06/28/2011 09:13 AM	CRD000016-16	CRD000016-16-19	Comment	Account & Billing>Bill charge	High	06/29/2011 10:12 AM	New
08/11/2011 02:58 PM	CRD20110811-118	CRD20110811-118-22	Complaint	Pricing & Promotion>Out of stock	High	08/11/2011 04:56 PM	New

Figure 16.51: Issue Aging Detail Report (Outstanding Cases)

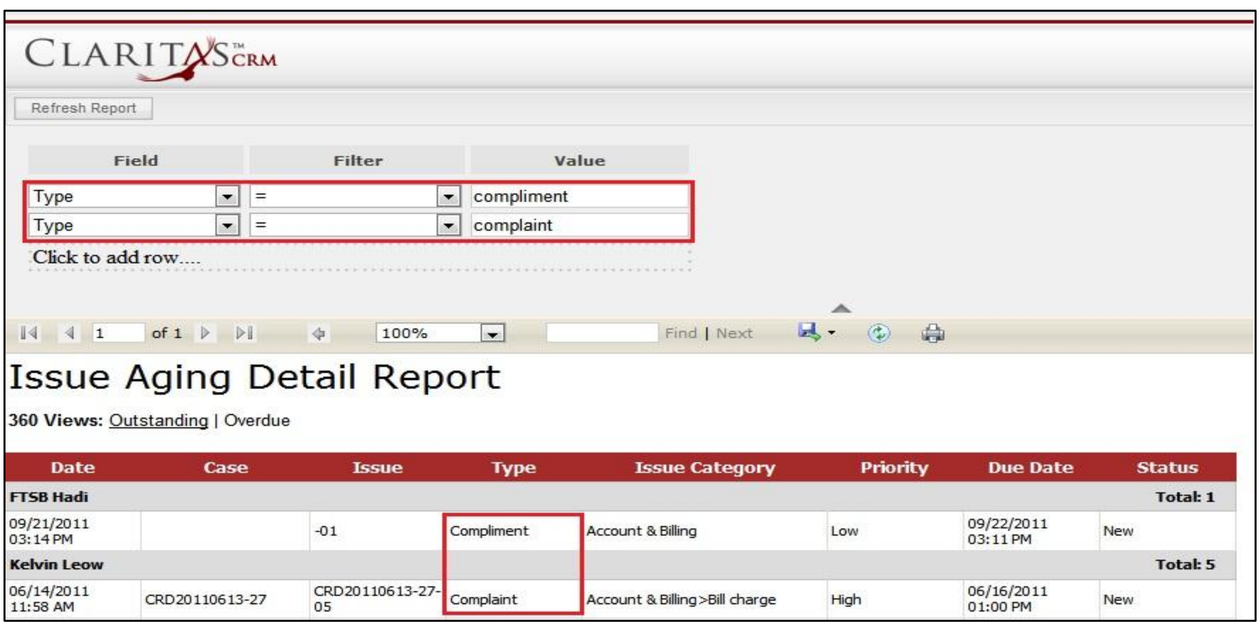
To view Issue Aging Detail Report based on Overdue Cases, click at the Overdue hyperlink.



Date	Case	Issue	Type	Issue Category	Priority	Due Date	Status
FTSB Hadi							Total: 1
09/21/2011 03:14 PM		-01	Compliment	Account & Billing	Low	09/22/2011 03:11 PM	New
Kelvin Leow							Total: 5
06/14/2011 11:58 AM	CRD20110613-27	CRD20110613-27-05	Complaint	Account & Billing>Bill charge	High	06/16/2011 01:00 PM	New
06/17/2011 12:57 PM	CRD000021-21	CRD000021-21-13	Enquiry	Account & Billing>Payment	High	06/18/2011 12:00 AM	New
06/24/2011 12:06 PM	CRD20110630-104	CRD20110630-104-01	Comment	Account & Billing>E-Billing	Low	06/03/2011 12:00 AM	New
06/29/2011 04:47 PM	CRD20110728-117	CRD20110728-117-01	Other	Account & Billing>Subscription	High	06/30/2011 09:47 AM	New
06/29/2011 11:52 PM	CRD20110727-114	CRD20110727-114-01	Comment	Pricing & Promotion>Price plan	High	07/01/2011 11:00 AM	Assigned
Kha Chun Fong							Total: 3
06/28/2011 09:04 AM	CRD000016-16	CRD000016-16-18	Comment	Account & Billing>Deposit	High	06/29/2011 10:04 AM	New
06/28/2011 09:13 AM	CRD000016-16	CRD000016-16-19	Comment	Account & Billing>Bill charge	High	06/29/2011 10:12 AM	New
08/11/2011 02:58 PM	CRD20110811-118	CRD20110811-118-22	Complaint	Pricing & Promotion>Out of stock	High	08/11/2011 04:56 PM	New

Figure 16.52: Issue Aging Detail Report (Overdue Cases)

User can also filter the record display by selecting the filters. Click at and select the Field, Filter and Value. Then, click at the Refresh Report button. Page will refresh and display result based on the filter entered.



Date	Case	Issue	Type	Issue Category	Priority	Due Date	Status
FTSB Hadi							Total: 1
09/21/2011 03:14 PM		-01	Compliment	Account & Billing	Low	09/22/2011 03:11 PM	New
Kelvin Leow							Total: 5
06/14/2011 11:58 AM	CRD20110613-27	CRD20110613-27-05	Complaint	Account & Billing>Bill charge	High	06/16/2011 01:00 PM	New

Figure 16.53: Filtered Issue Aging Detail Report

To go to the First Page of the report, click at the **First Page Image Icon** .

To go to the Previous Page of the report, click at the **Previous Page Image Icon** .

To go to the Next Page of the report, click at the **Next Page Image Icon** .

To go to the Last Page of the report, click at the **Last Page Image Icon** .

To find any keyword, type in the **keyword** (Example: **Comment**) in the **Find textbox** and click **Find**.

Figure 16.54: Find Textbox in Case Turnaround

To find next result of Comment, click at the **Next** button.

To export the report to **Excel**, **PDF** or **Word**, click at the **Export Image Icon** and select the format of report to be exported as.

Figure 16.55: Export Issue Aging Detail Report

To refresh the report, click at the **Refresh Icon** . The page will refresh and report will reload.

To print the report, click at the **Print Icon** . A print window will pop up for user to check the setting before printing.

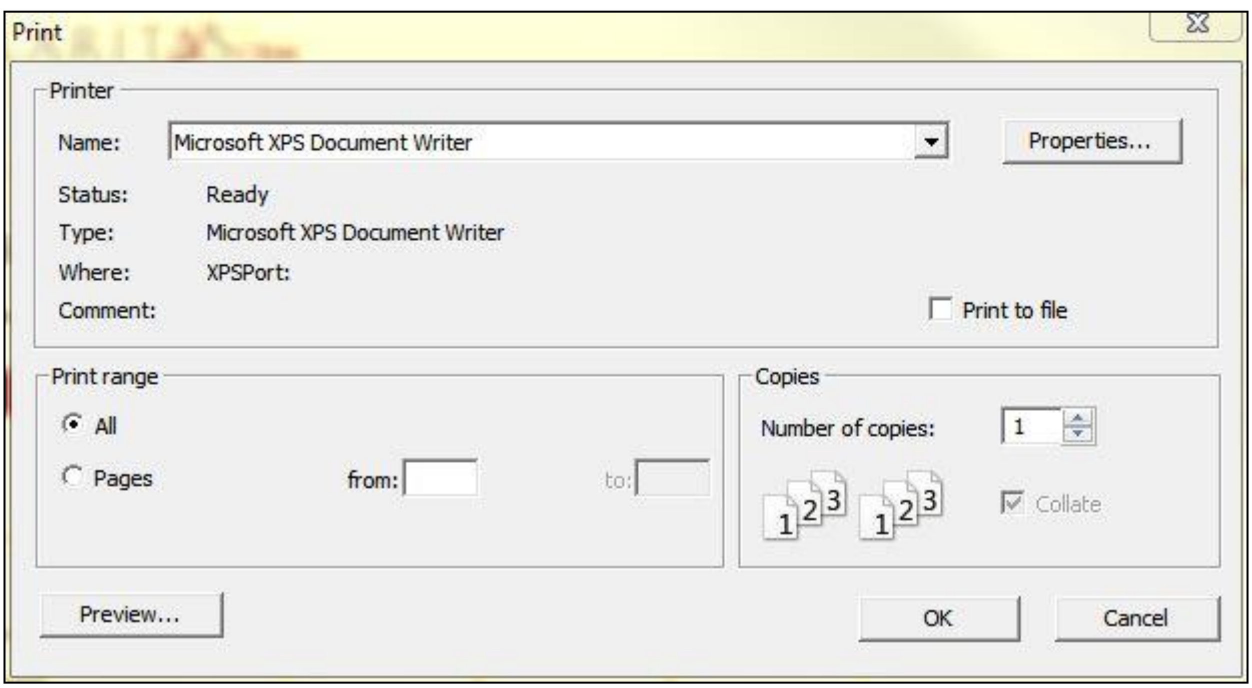


Figure 16.56: Print Popup

Lead Reports

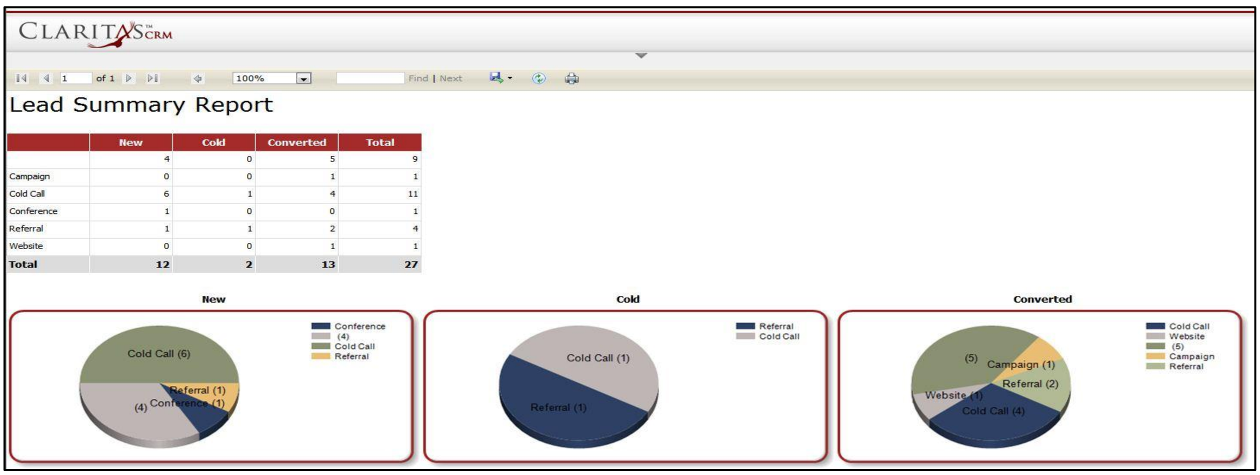
Lead Summary Report

Click at **Report** menu at the Main Menu bar.

Figure 16.57: Report Menu in Main Menu

To view the **Lead Summary Report**, click at the <u>Lead Report 01: Lead Summary</u> hyperlink, Lead Summary Report window will pop up.

The report shows the Lead Summary Report of all Leads available.



	New	Cold	Converted	Total
	4	0	5	9
Campaign	0	0	1	1
Cold Call	6	1	4	11
Conference	1	0	0	1
Referral	1	1	2	4
Website	0	0	1	1
Total	**12**	**2**	**13**	**27**

Figure 16.58: Lead Summary Report

User can also filter the record display by selecting the filters. Click at and select the Field, Filter and Value. Then, click at the Refresh Report button. Page will refresh and display result based on the filter entered.

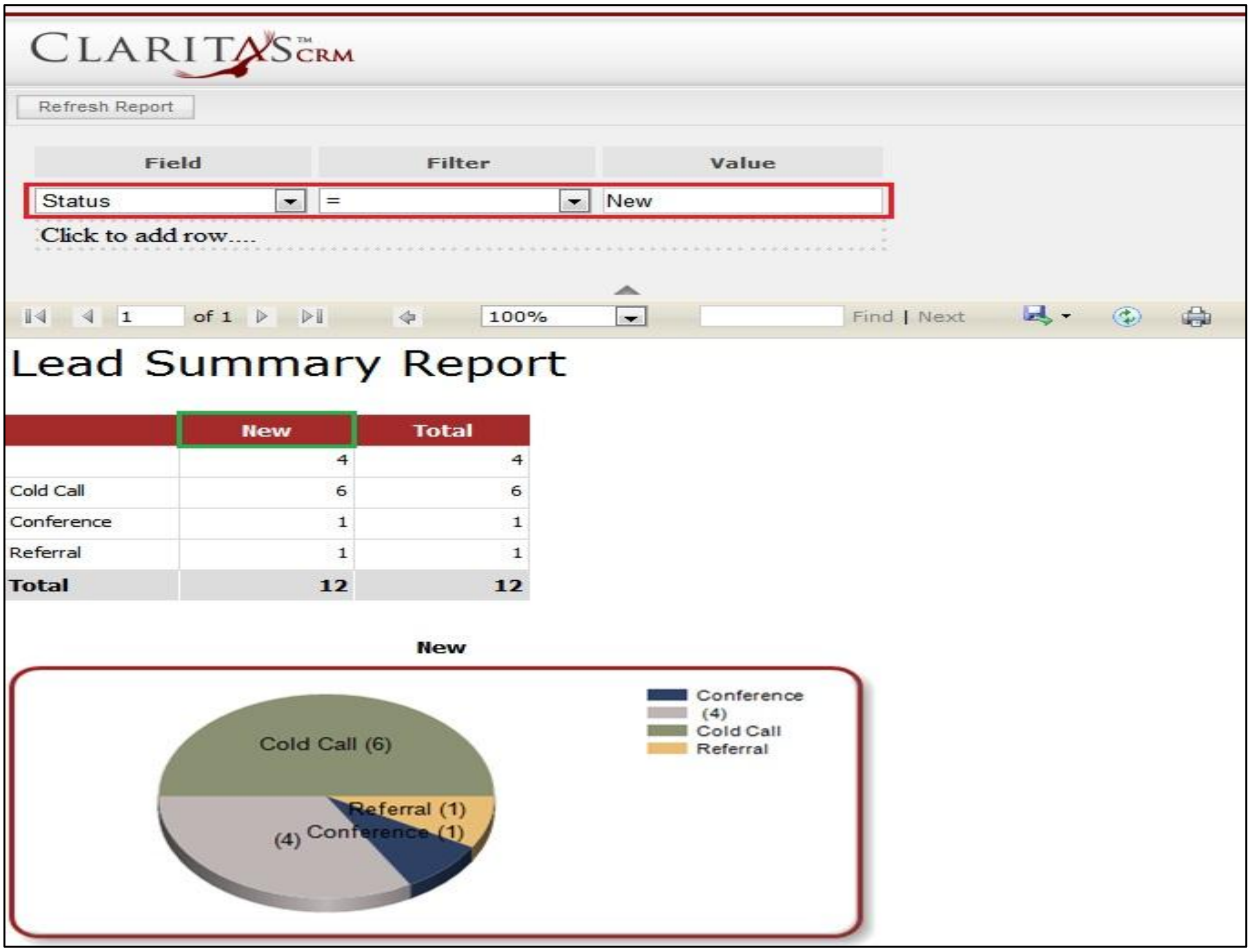


Figure 16.59: Filtered Lead Summary Report

To go to the First Page of the report, click at the **First Page Image Icon**.

To go to the Previous Page of the report, click at the **Previous Page Image Icon**.

To go to the Next Page of the report, click at the **Next Page Image Icon**.

To go to the Last Page of the report, click at the **Last Page Image Icon**.

To find any keyword, type in the **keyword** (Example: **Lead**) in the **Find textbox** and click **Find**.

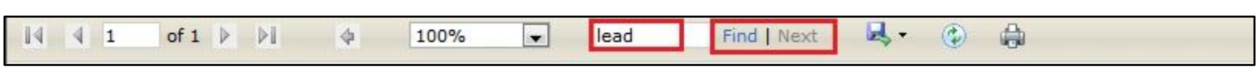


Figure 16.60: Find Textbox in Lead Summary Report

To find next result of Lead, click at the **Next** button.

To export the report to **Excel**, **PDF** or **Word**, click at the **Export Image Icon** and select the format of report to be exported as.

Figure 16.61: Export Lead Summary Report

To refresh the report, click at the **Refresh Icon**. The page will refresh and report will reload.

To print the report, click at the **Print Icon**. A print window will pop up for user to check the setting before printing.

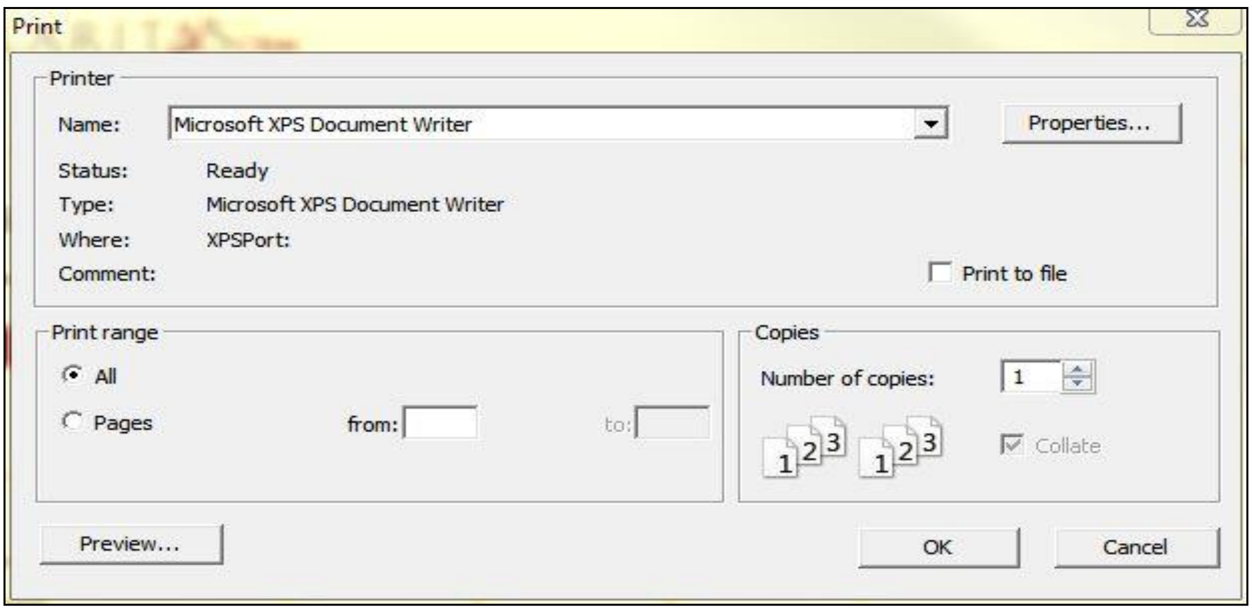


Figure 16.62: Print Popup

Lead Demographic Report

Click at **Report** menu at the Main Menu bar.

Figure 16.63: Report Menu in Main Menu

To view the **Lead Demographic Report**, click at the <u>Lead Report 02: Lead Demographic</u> hyperlink, Lead Demographic Report window will pop up.

The report shows the Lead Demographic Report of all Leads available.

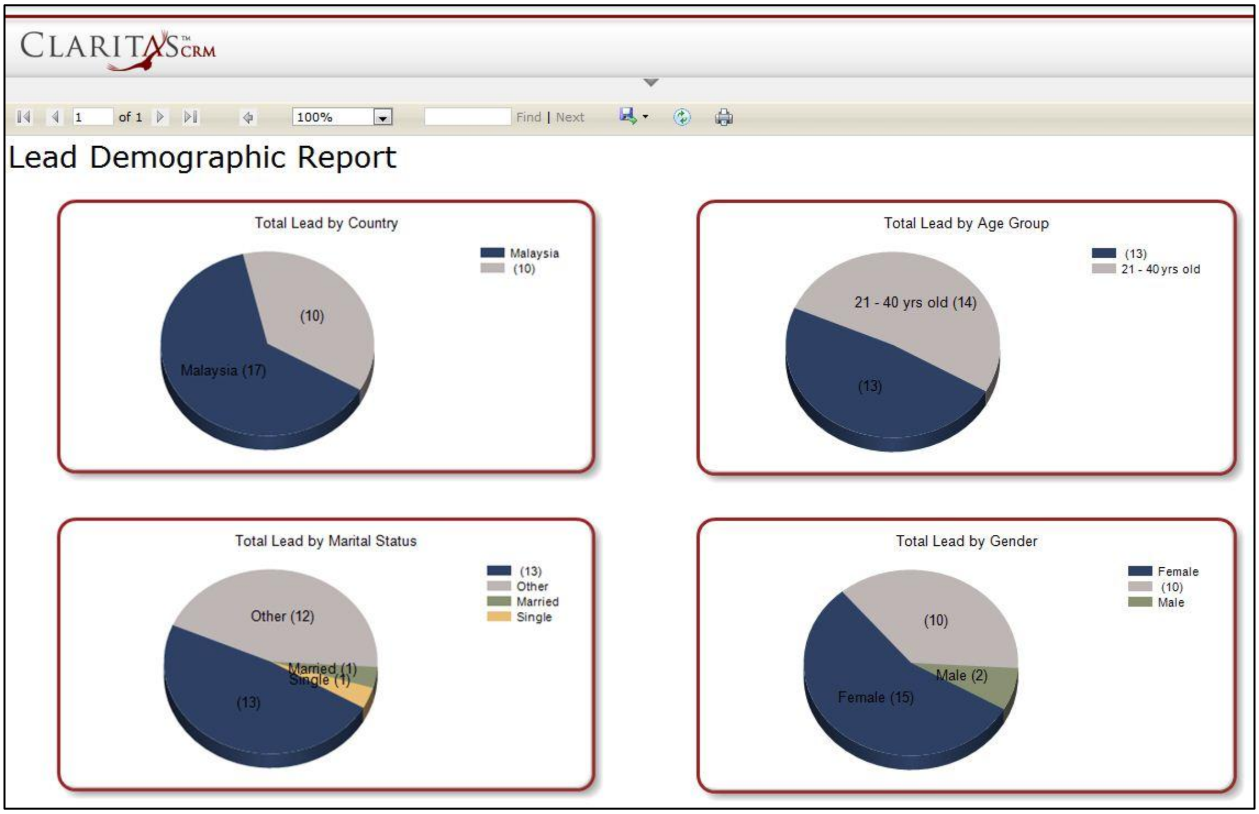


Figure 16.64: Lead Demographic Report

User can also filter the record display by selecting the filters. Click at  and select the Field, Filter and Value. Then, click at the  button. Page will refresh and display result based on the filter entered.

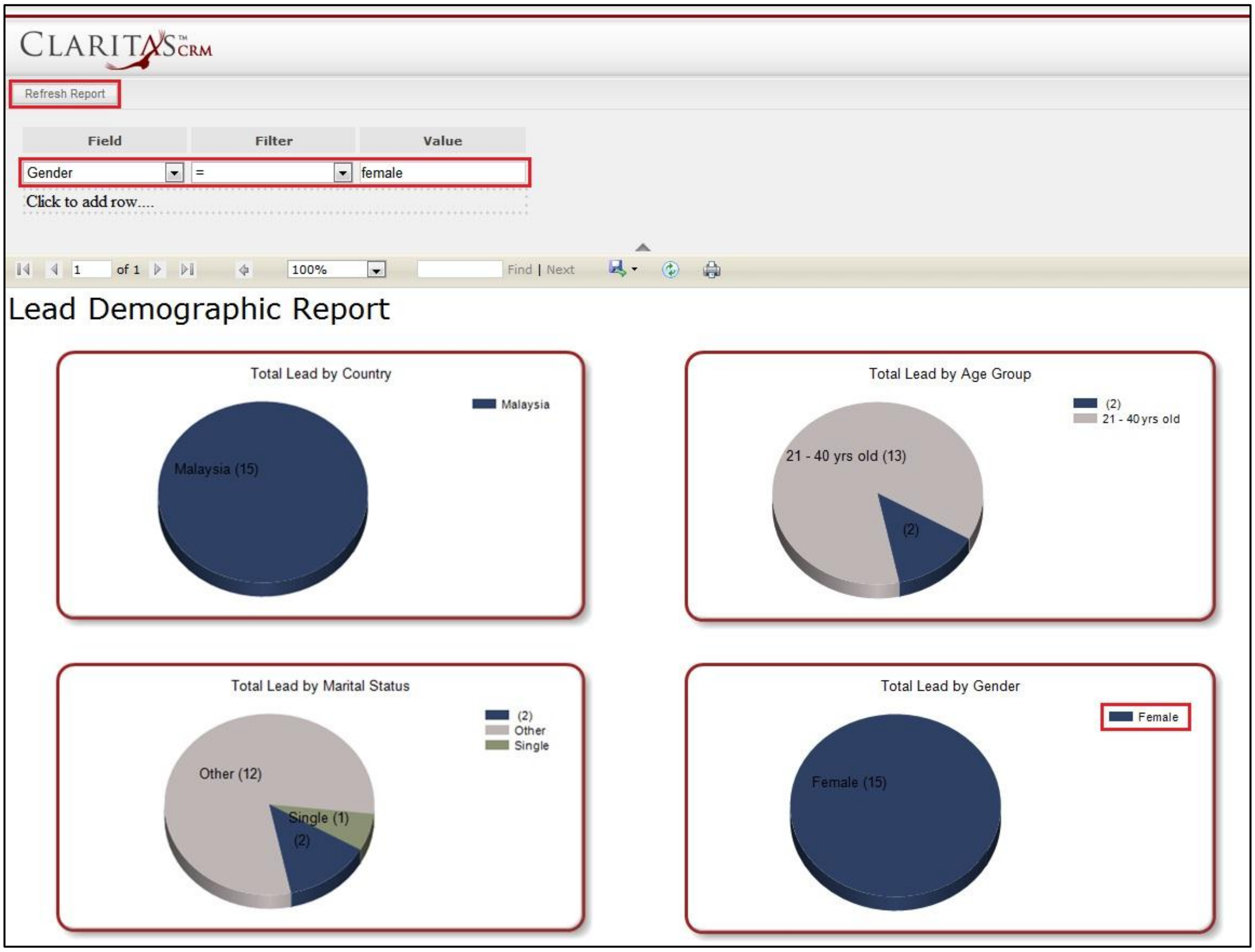
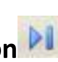


Figure 16.65: Filtered Lead Demographic Report

To go to the First Page of the report, click at the **First Page Image Icon** .

To go to the Previous Page of the report, click at the **Previous Page Image Icon** .

To go to the Next Page of the report, click at the **Next Page Image Icon** .

To go to the Last Page of the report, click at the **Last Page Image Icon** .

To find any keyword, type in the **keyword** (Example: **Lead**) in the **Find textbox** and click **Find**.

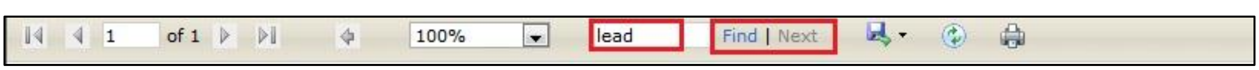


Figure 16.66: Find Textbox in Lead Demographic Report

To find next result of Lead, click at the **Next** button.

To export the report to **Excel**, **PDF** or **Word**, click at the **Export Image Icon** and select the format of report to be exported as.

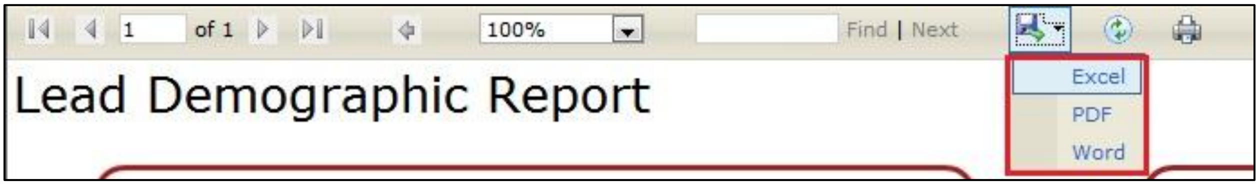


Figure 16.67: Export Lead Demographic Report

To refresh the report, click at the **Refresh Icon**. The page will refresh and report will reload.

To print the report, click at the **Print Icon**. A print window will pop up for user to check the setting before printing.

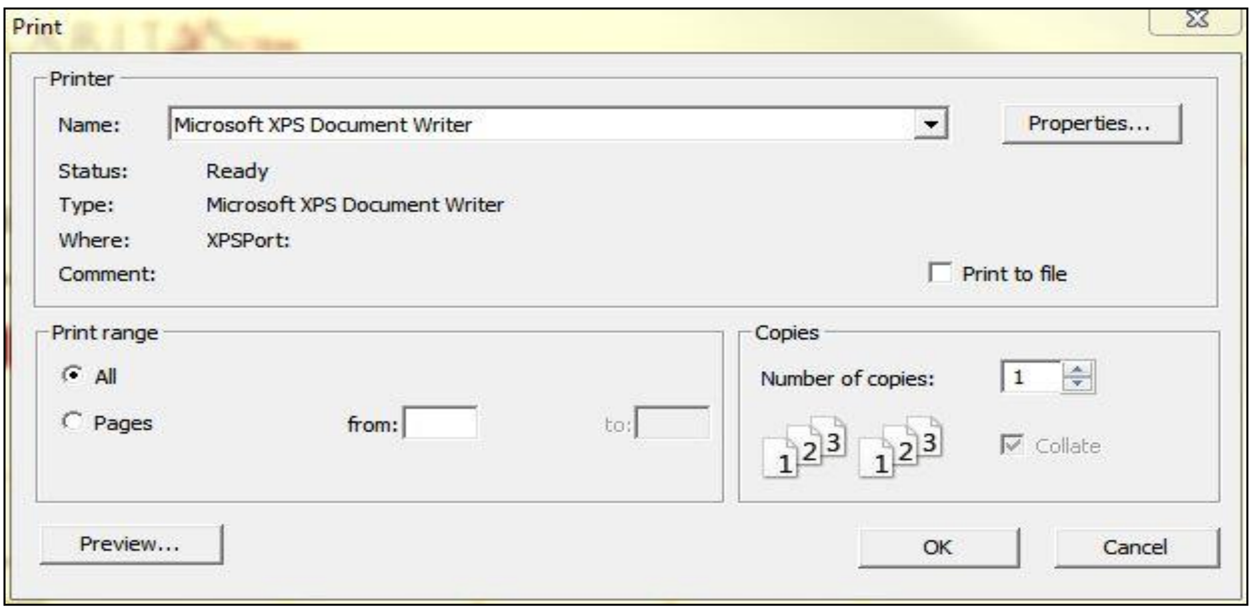


Figure 16.68: Print Popup

Opportunity Report

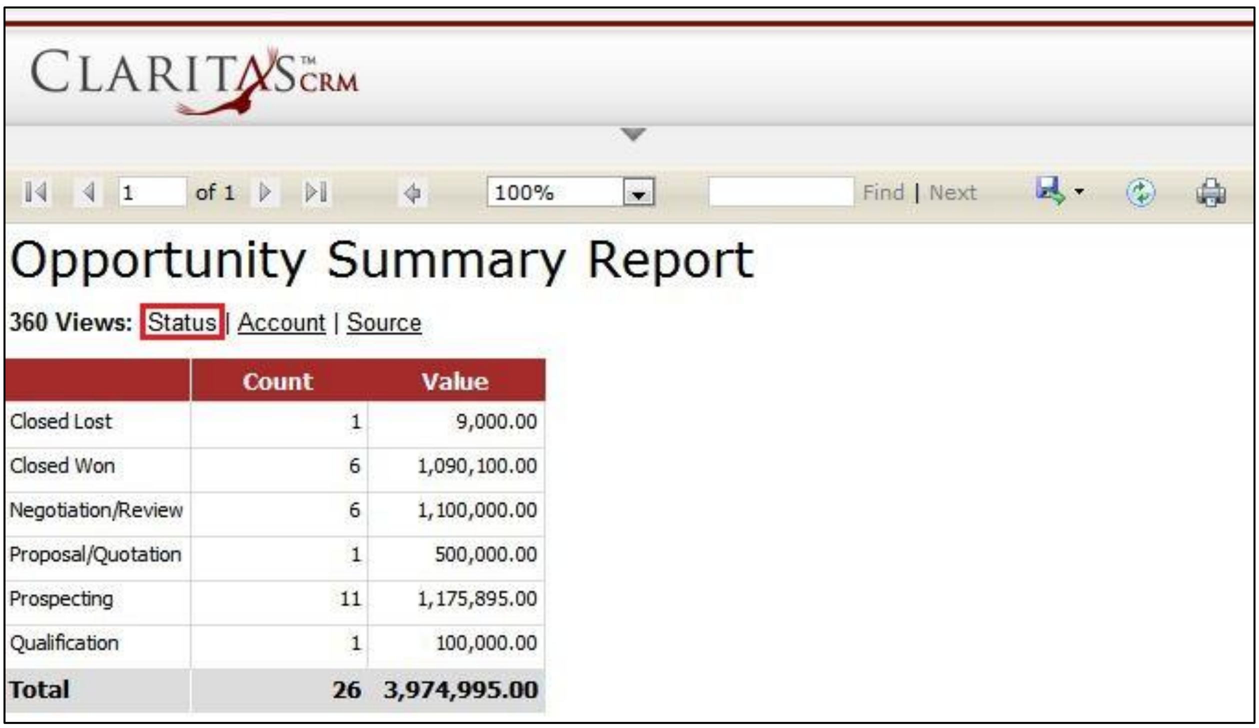
Opportunity Summary

Click at **Report** menu at the Main Menu bar.

Figure 16.69: Report Menu in Main Menu

To view the **Opportunity Summary Report**, click at the Opportunity Report 01: Opportunity Summary hyperlink, Opportunity Summary Report window will pop up.

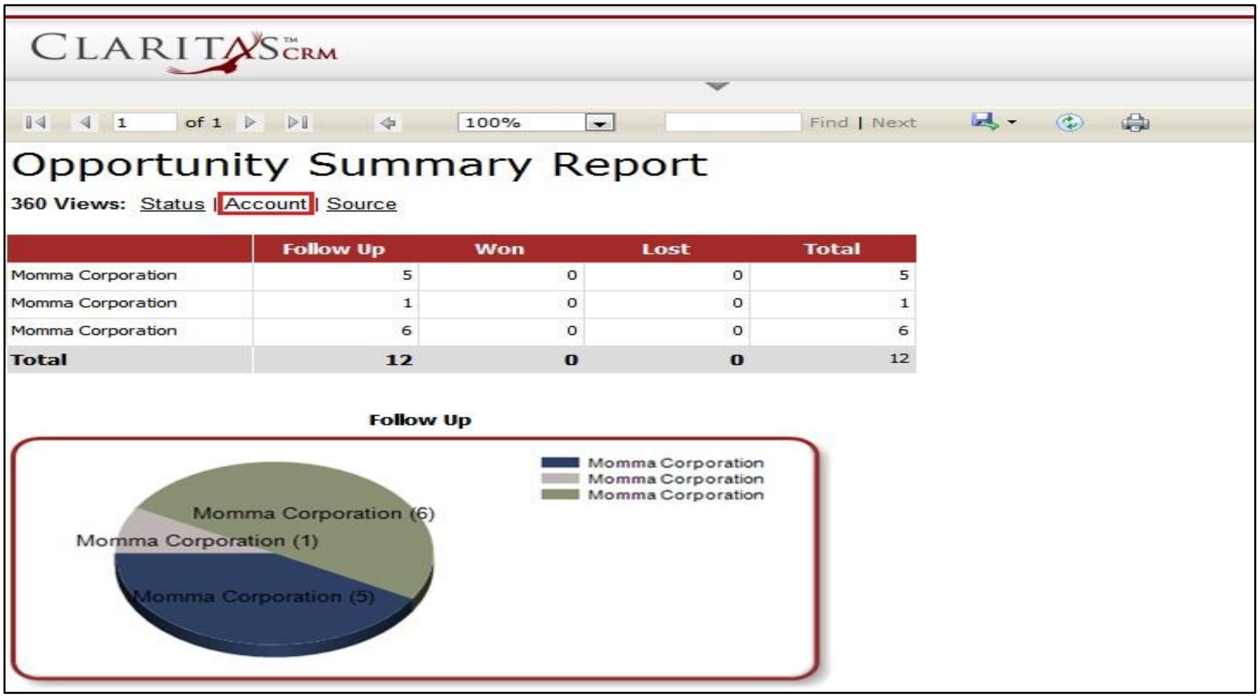
The report shows the Opportunity Summary Report of all Opportunities available based on Status (default view).



	Count	Value
Closed Lost	1	9,000.00
Closed Won	6	1,090,100.00
Negotiation/Review	6	1,100,000.00
Proposal/Quotation	1	500,000.00
Prospecting	11	1,175,895.00
Qualification	1	100,000.00
Total	**26**	**3,974,995.00**

Figure 16.70: Opportunity Summary Report

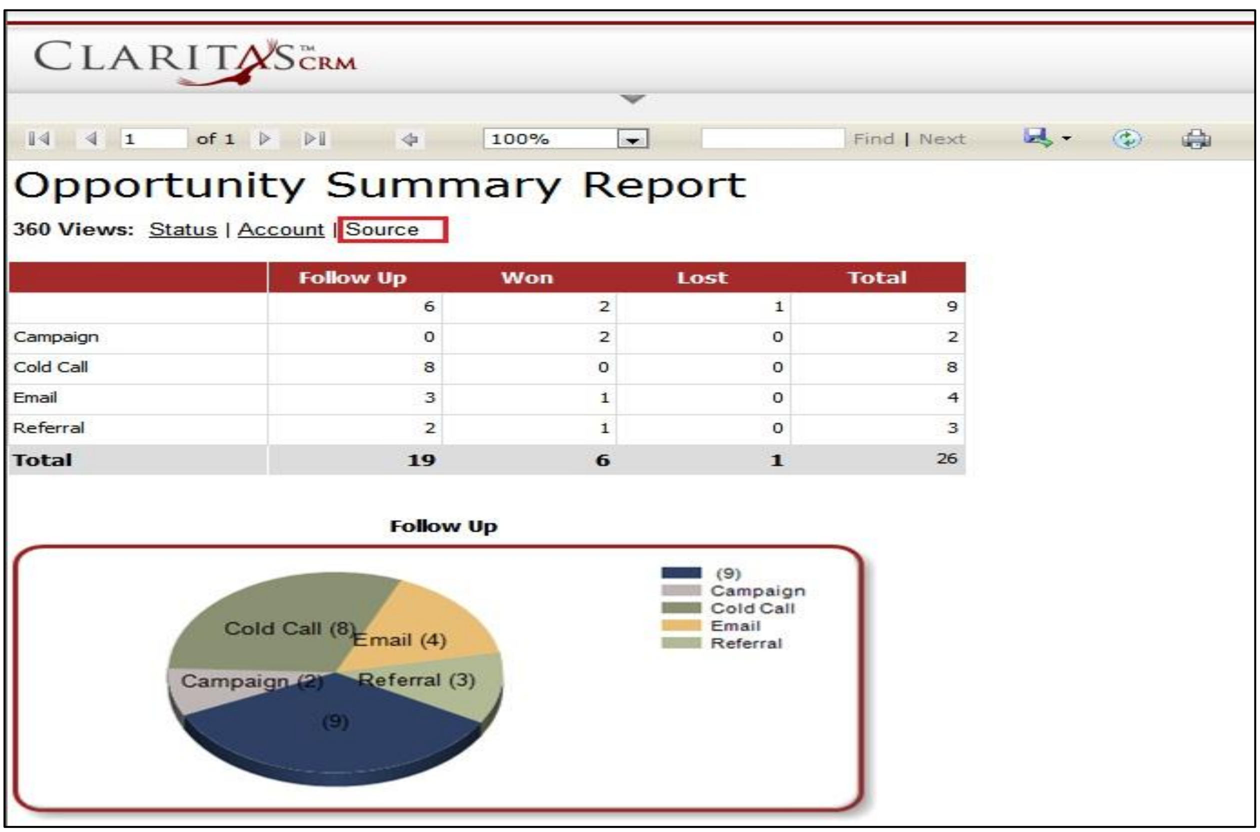
To view Opportunity Summary Report based on Account, click at the Account hyperlink.



	Follow Up	Won	Lost	Total
Momma Corporation	5	0	0	5
Momma Corporation	1	0	0	1
Momma Corporation	6	0	0	6
Total	**12**	**0**	**0**	12

Figure 16.71: Opportunity Summary Report (Feedback Type)

To view Opportunity Summary Report based on Source, click at the Source hyperlink.



	Follow Up	Won	Lost	Total
	6	2	1	9
Campaign	0	2	0	2
Cold Call	8	0	0	8
Email	3	1	0	4
Referral	2	1	0	3
Total	**19**	**6**	**1**	26

Figure 16.72: Opportunity Summary Report (Account)

User can also filter the record display by selecting the filters. Click at and select the Field, Filter and Value. Then, click at the Refresh Report button. Page will refresh and display result based on the filter entered.

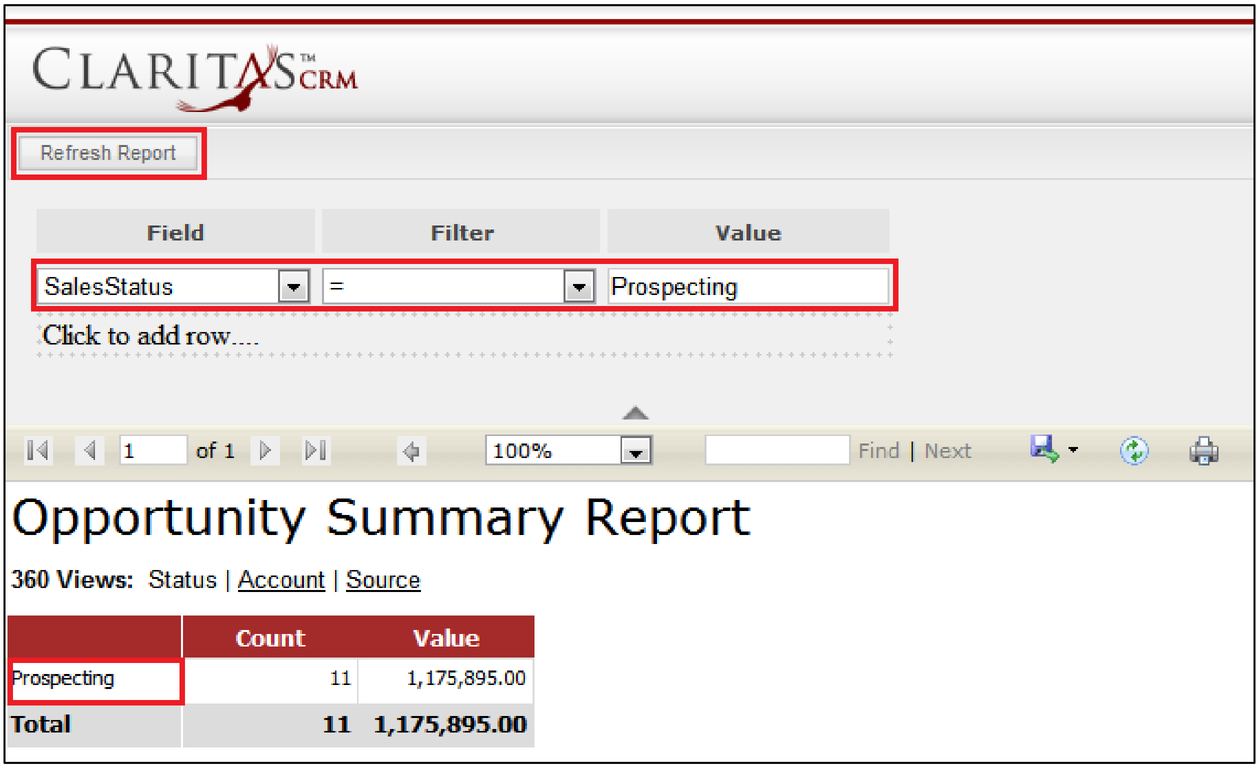


Figure 16.73: Filtered Opportunity Summary Report

To go to the First Page of the report, click at the **First Page Image Icon** .

To go to the Previous Page of the report, click at the **Previous Page Image Icon** .

To go to the Next Page of the report, click at the **Next Page Image Icon** .

To go to the Last Page of the report, click at the **Last Page Image Icon** .

To find any keyword, type in the **keyword** (Example: **Opportunity**) in the **Find textbox** and click **Find**.

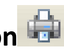
Figure 16.74: Find Textbox in Opportunity Summary Report

To find next result of Opportunity, click at the **Next** button.

To export the report to **Excel**, **PDF** or **Word**, click at the **Export Image Icon**  and select the format of report to be exported as.

Figure 16.75: Export Opportunity Summary Report

To refresh the report, click at the **Refresh Icon** . The page will refresh and report will reload.

To print the report, click at the **Print Icon** . A print window will pop up for user to check the setting before printing.

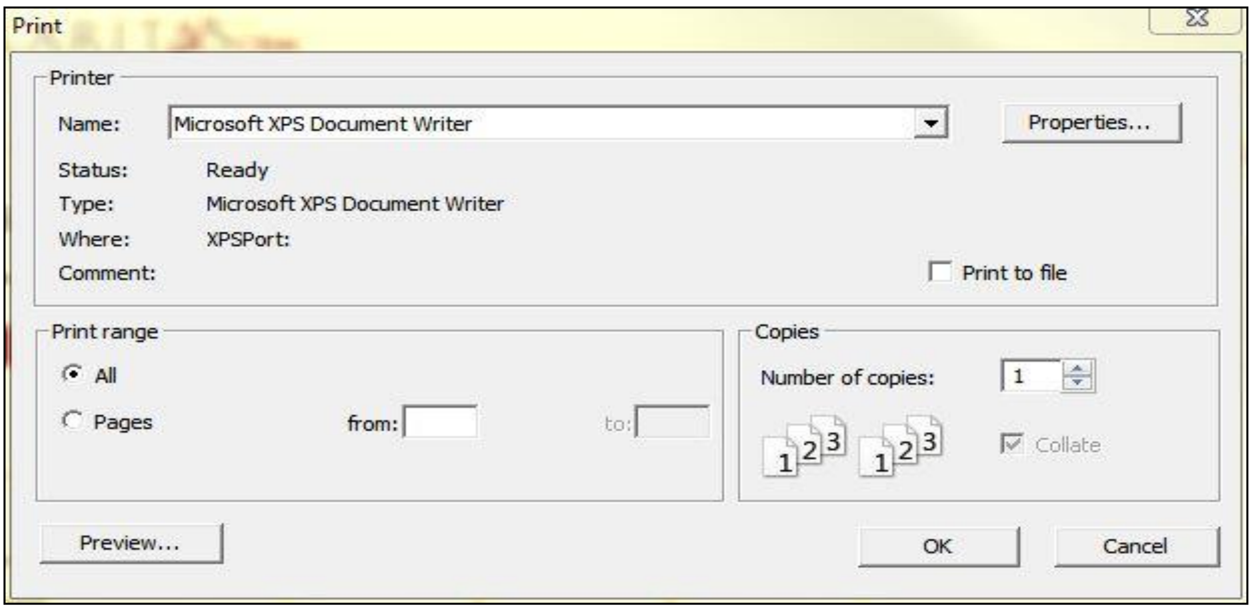


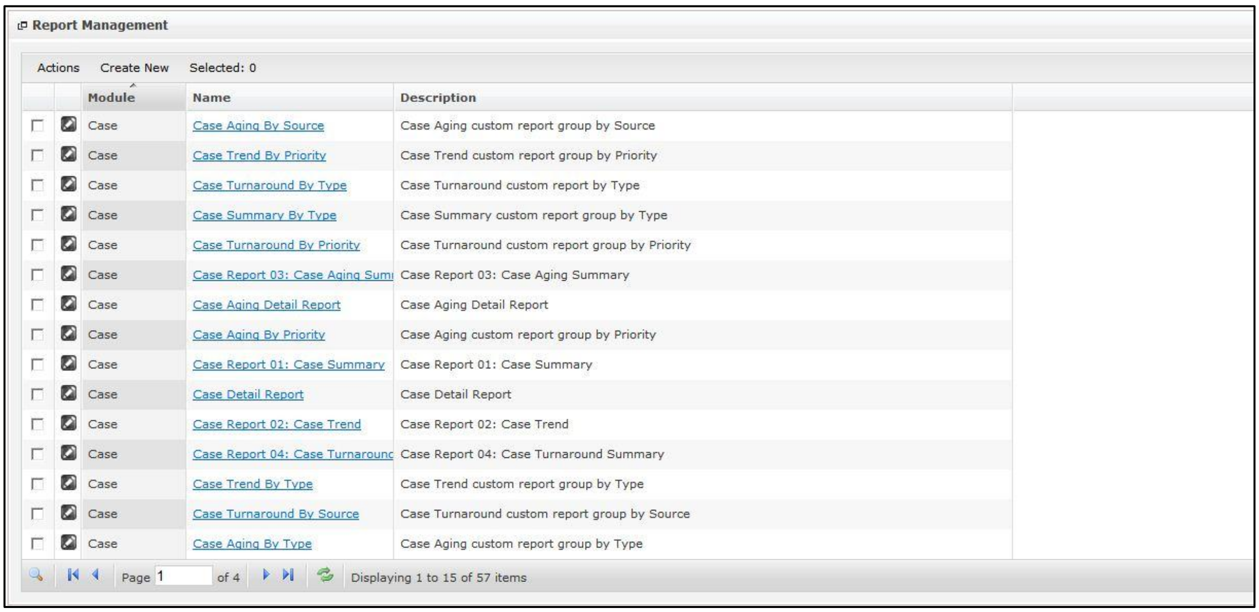
Figure 16.76: Print Popup

Report Listing

To view Report Listing, click at the **Report** menu at the Main Menu bar.

Figure 16.77: Report Menu in Main Menu

Page will load the list of the Reports available in the system.



Report Management

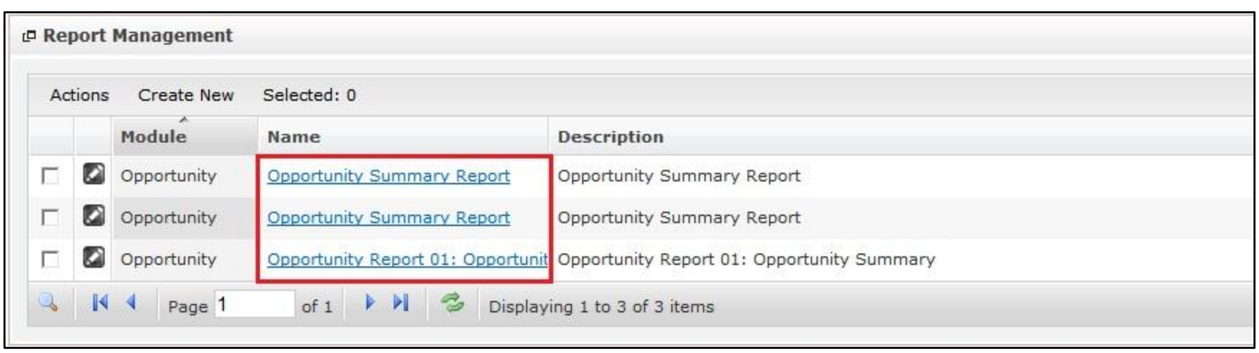
Actions Create New Selected: 0

Module	Name	Description
Case	Case Aging By Source	Case Aging custom report group by Source
Case	Case Trend By Priority	Case Trend custom report group by Priority
Case	Case Turnaround By Type	Case Turnaround custom report by Type
Case	Case Summary By Type	Case Summary custom report group by Type
Case	Case Turnaround By Priority	Case Turnaround custom report group by Priority
Case	Case Report 03: Case Aging Sum	Case Report 03: Case Aging Summary
Case	Case Aging Detail Report	Case Aging Detail Report
Case	Case Aging By Priority	Case Aging custom report group by Priority
Case	Case Report 01: Case Summary	Case Report 01: Case Summary
Case	Case Detail Report	Case Detail Report
Case	Case Report 02: Case Trend	Case Report 02: Case Trend
Case	Case Report 04: Case Turnaround	Case Report 04: Case Turnaround Summary
Case	Case Trend By Type	Case Trend custom report group by Type
Case	Case Turnaround By Source	Case Turnaround custom report group by Source
Case	Case Aging By Type	Case Aging custom report group by Type

Page 1 of 4 Displaying 1 to 15 of 57 items

Figure 16.78: Report Listing

To view the Report Details, click at the Report Name hyperlink in Name column.



Report Management

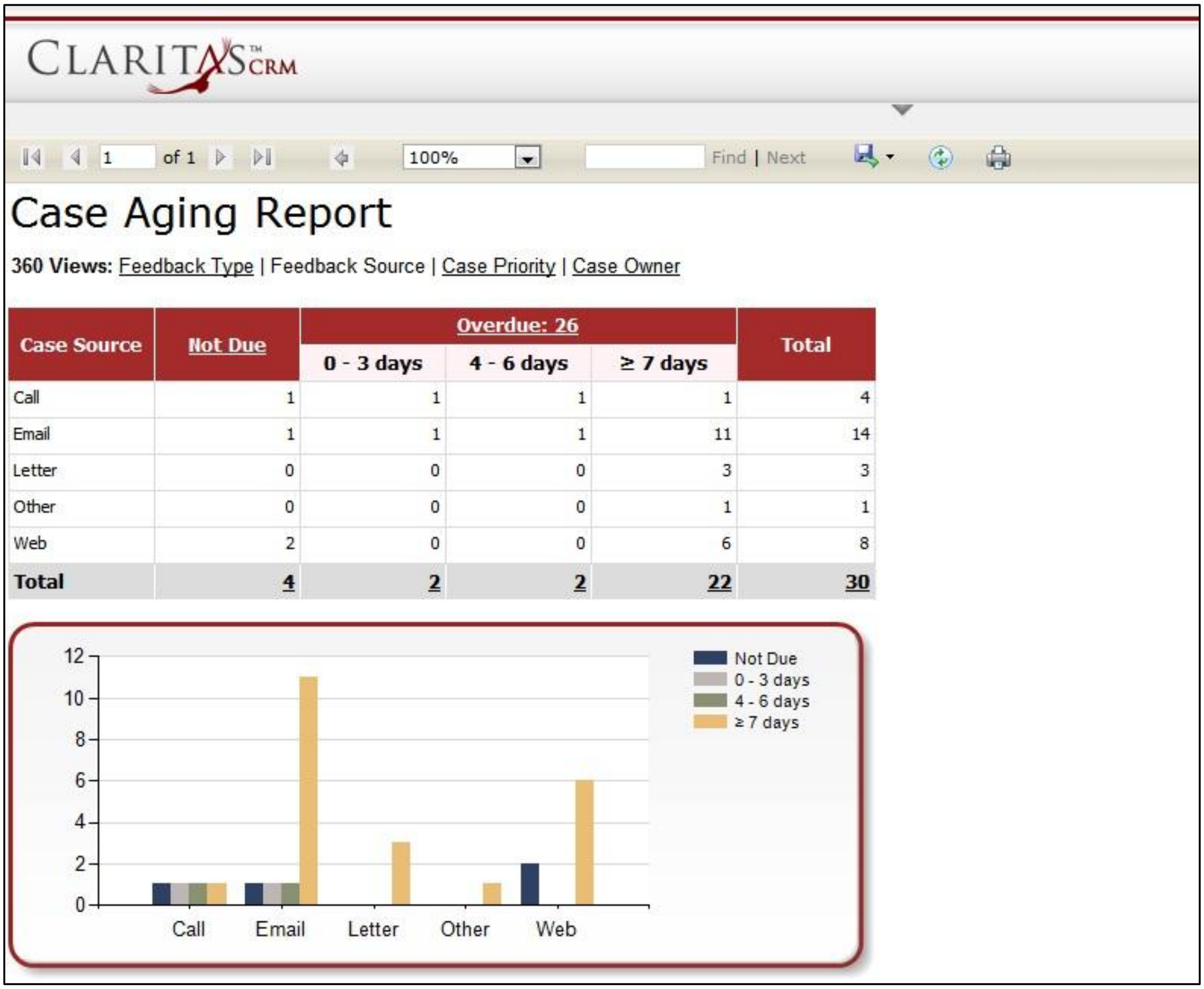
Actions Create New Selected: 0

Module	Name	Description
Opportunity	Opportunity Summary Report	Opportunity Summary Report
Opportunity	Opportunity Summary Report	Opportunity Summary Report
Opportunity	Opportunity Report 01: Opportunit	Opportunity Report 01: Opportunity Summary

Page 1 of 1 Displaying 1 to 3 of 3 items

Figure 16.79: Report Name Hyperlink

After clicking the Report Name hyperlink, windows showing the report will popup.



Case Source	Not Due	Overdue: 26			Total
		0 - 3 days	4 - 6 days	≥ 7 days	
Call	1	1	1	1	4
Email	1	1	1	11	14
Letter	0	0	0	3	3
Other	0	0	0	1	1
Web	2	0	0	6	8
Total	**4**	**2**	**2**	**22**	**30**

Figure 16.80: Report Popup

To go to the First Page of the listing, click at the **First Page** button.

To go to the Previous Page of the listing, click at the **Previous Page** button.

To go to the Next Page of the listing, click at the **Next Page** button.

To go to the Last Page of the listing, click at the **Last Page** button.

To refresh the listing page, click at the **Refresh** button.

To search for record/s, click at the **Search**  button. An **Advance Search** section will expand at the bottom of the listing for user to select the search field and enter search value.

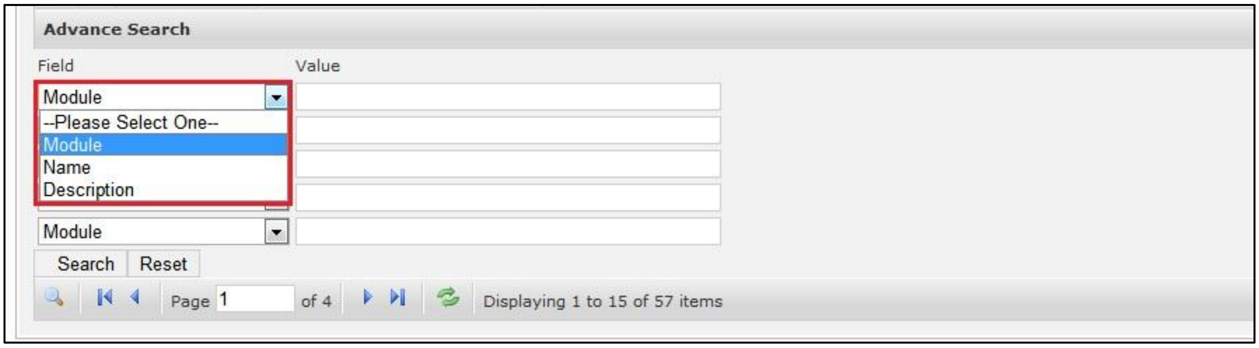


Figure 16.81: Report Advance Search

17 Admin – User

This module is to **create and store User details**.

User Listing

To view User Listing, click at the **Admin** menu at the Main Menu bar.

Figure 17.1: Admin Menu in Main Menu

Page will navigate to Admin Management Page. Click at the User Menu in Admin Management Page.

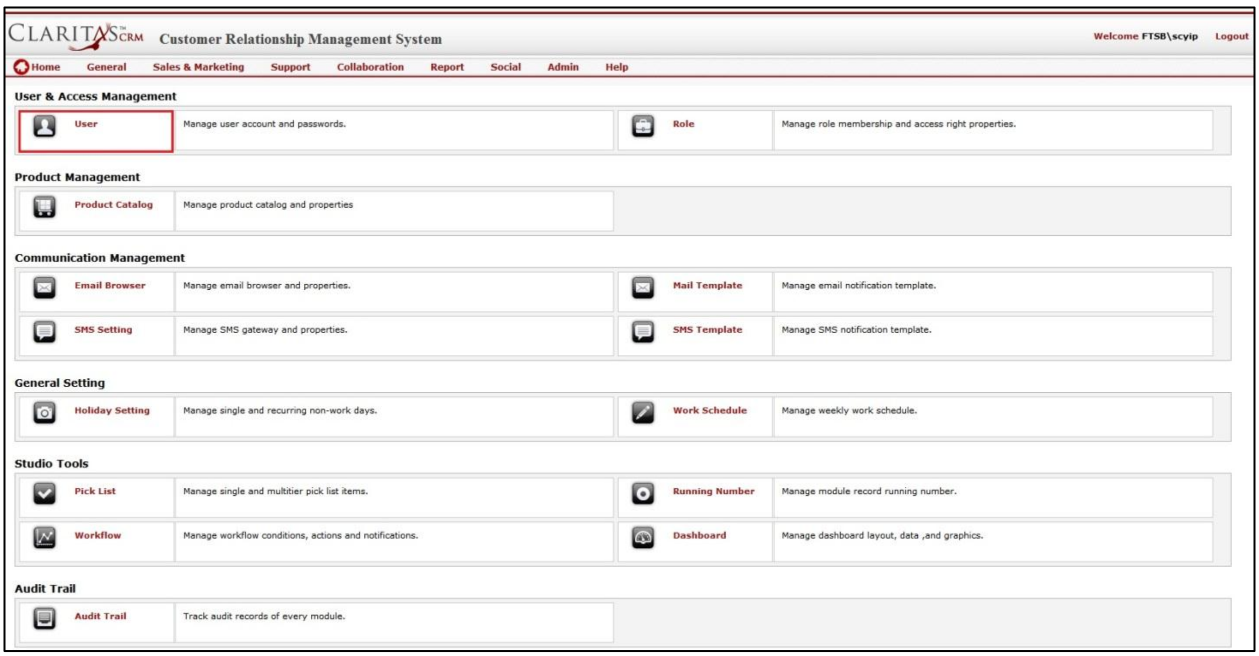


Figure 17.2: User Menu in Admin Management Page

Page will load the list of the User available in the system.

Figure 17.3: User Listing

To view the User Details, click at the First Name or Last Name hyperlink in First Name or Last Name column.

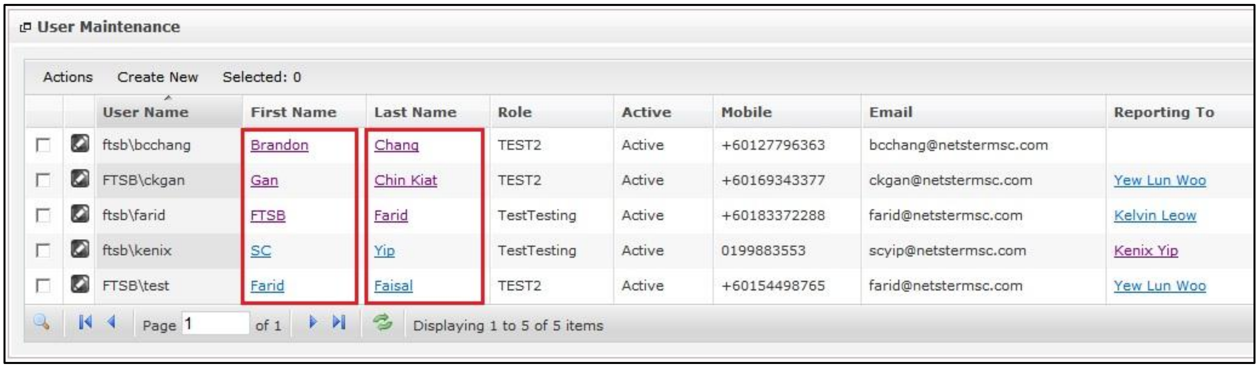


Figure 17.4: First Name and Last Name Hyperlink

After clicking the First Name or Last Name hyperlink, page will navigate to the **User Maintenance Detail** page which displays all the details of the User include related **Activities**, **History** and **User List**.

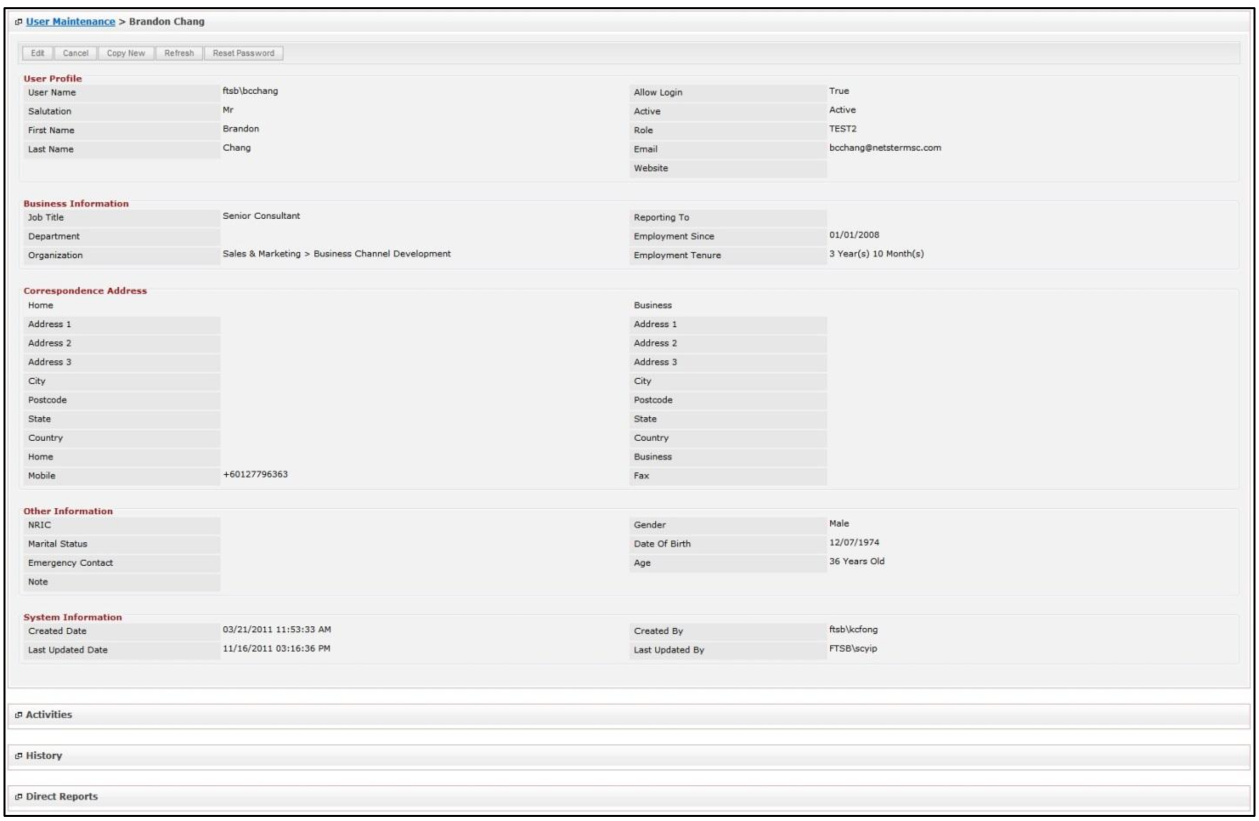
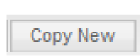


Figure 17.5: User Maintenance Detail Page

To copy the entire record and save as a new record, click 

button at **User Maintenance Detail** page.

To reset user's password, click Reset Password button at **User Maintenance Detail** page. A message showing "New password has been sent to [User_Email]" will popup.

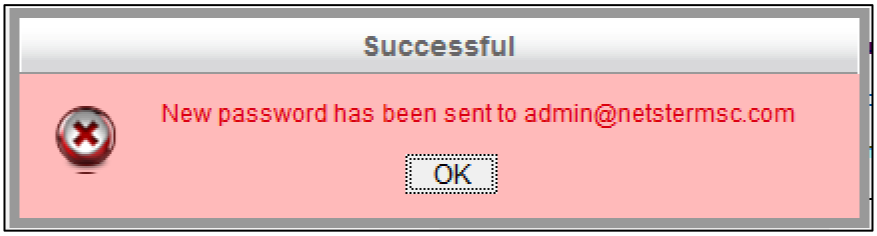


Figure 17.6: Reset Password Popup

To create a new user, click at Create New menu at the top of the User Listing.

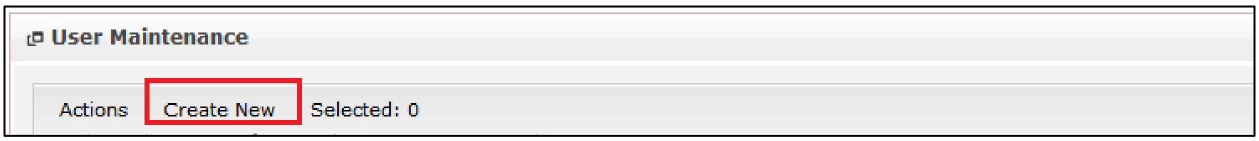


Figure 17.7: Create New User Menu

After clicking Create New menu, page will navigate to **User Maintenance** page. Enter the relevant details and click Save button to save the changes and navigates to **User Maintenance Detail** page or click Cancel button to cancel creating and navigates back to the **User Listing** page.

***Related Topics**: See "Create New User"*

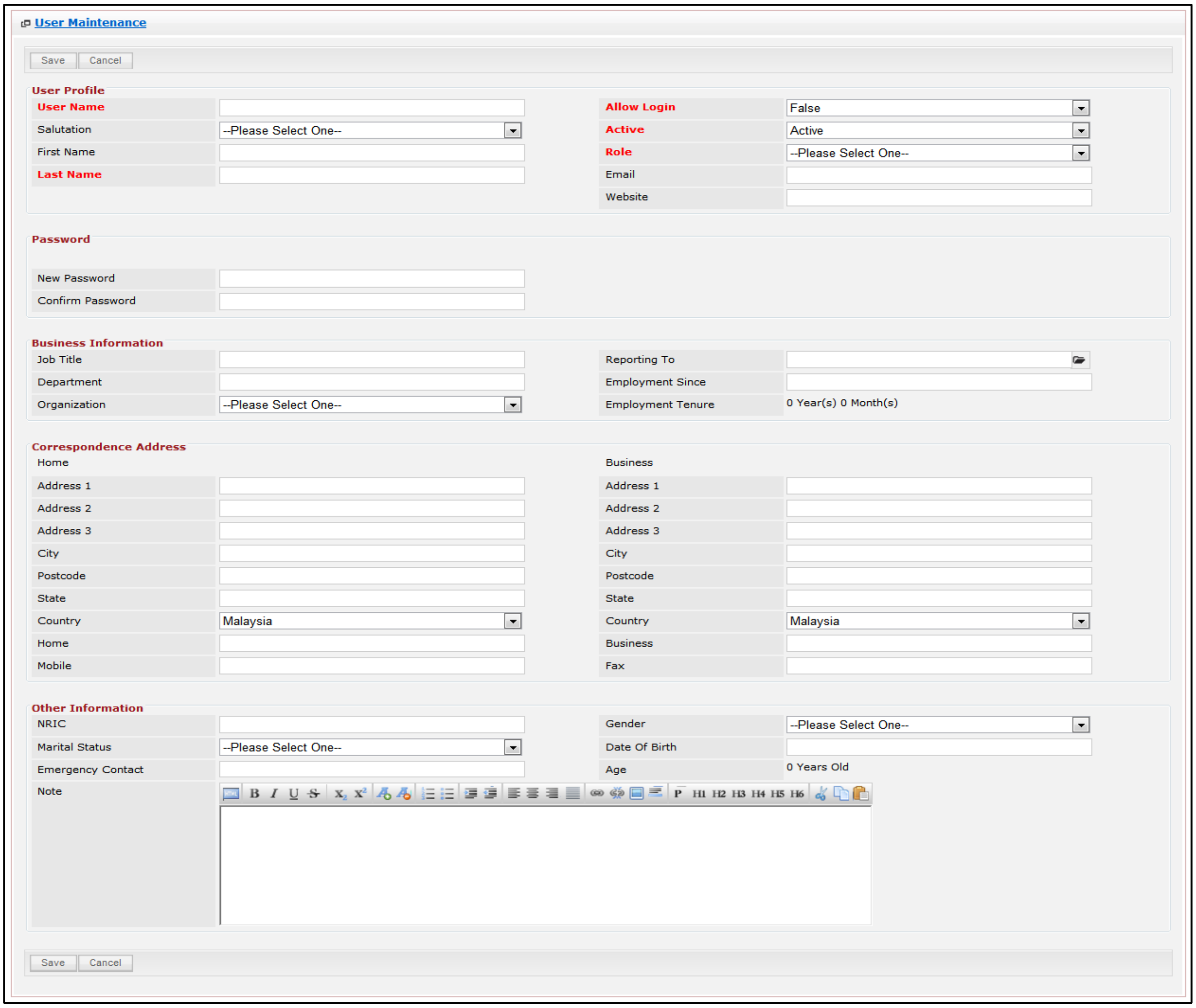


Figure 17.8: User Maintenance Create New Page

To **delete** a user, select the record and click **Actions > Delete**.

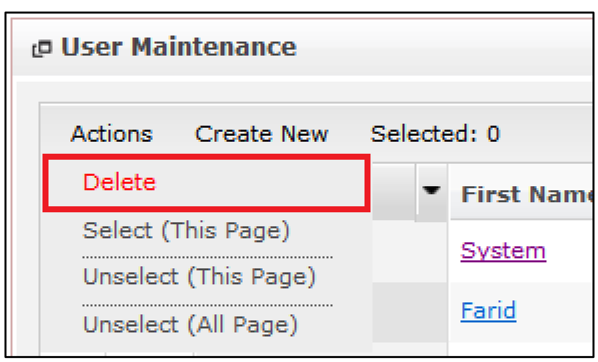


Figure 17.9: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 17.10: Message Showing User Deleted Successfully

Deleted user will **no longer** be displayed in User Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

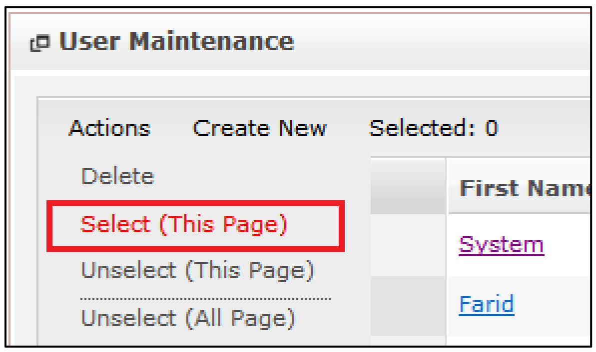


Figure 17.11: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

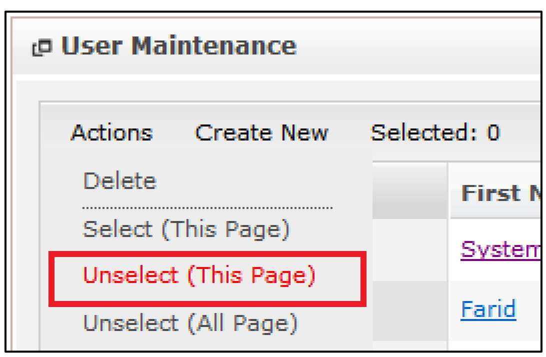


Figure 17.12: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

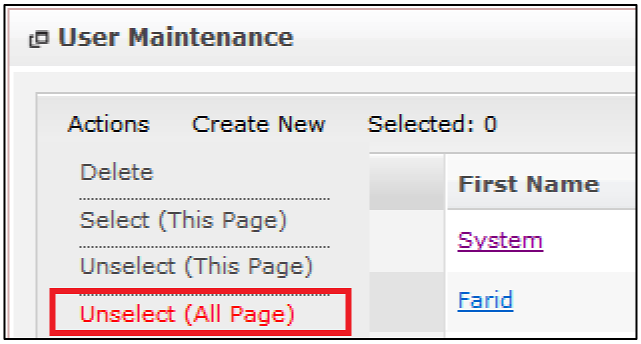


Figure 17.13: Actions > Unselect (All Pages) Menu

To go to the First Page of the listing, click at the **First Page** button.

To go to the Previous Page of the listing, click at the **Previous Page** button.

To go to the Next Page of the listing, click at the **Next Page** button.

To go to the Last Page of the listing, click at the **Last Page** button.

To refresh the listing page, click at the **Refresh** button.

To search for record/s, click at the **Search** button. An **Advance Search** section will expand at the bottom of the listing for user to select the search field and enter search value.

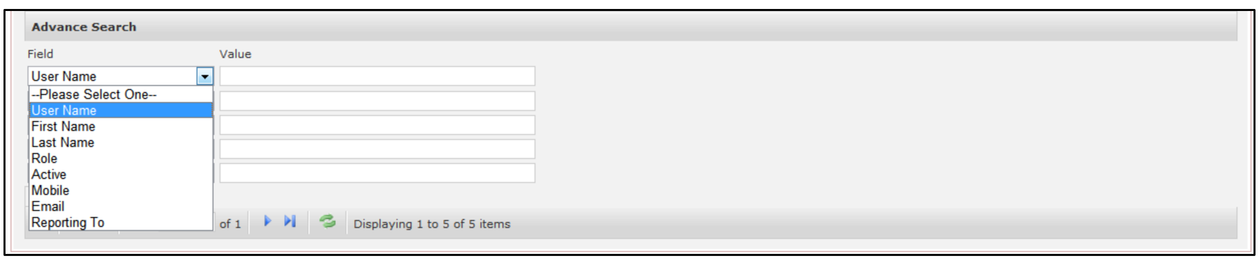


Figure 17.14: User Advance Search

To edit the details of the User, click at the **Edit** button or click the Edit button in **User Maintenance Detail** page. After clicking at the **Edit** button page will navigate to the **User Maintenance Edit** page.

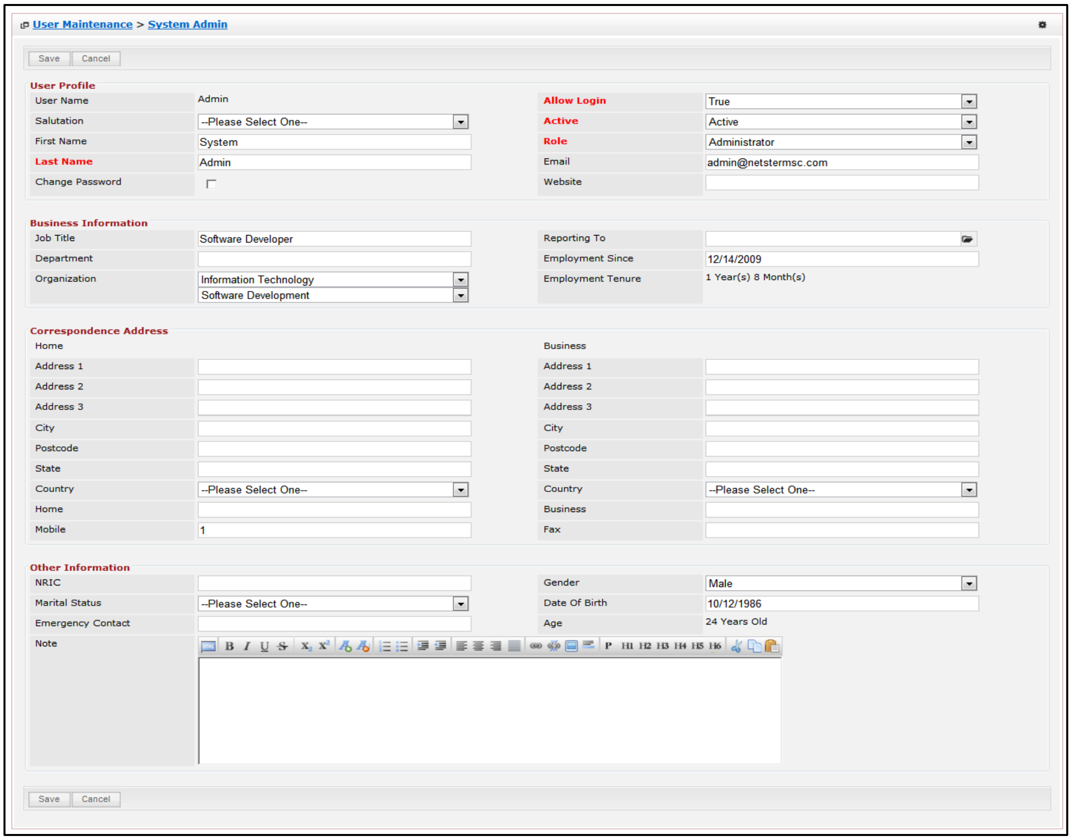


Figure 17.15: User Maintenance Edit Page

Edit the relevant details and click Save button to save the changes and navigates back to **User Maintenance Detail** page or click Save and Next button to save the changes and navigates to the **User Maintenance Edit** page of the next User. Or click Cancel button to cancel editing and navigates back to the **User Maintenance Detail** page.

To change the user's password, check ☑ the Change Password checkbox, a Password section will appear for user to enter Old Password, New Password and Confirm Password.

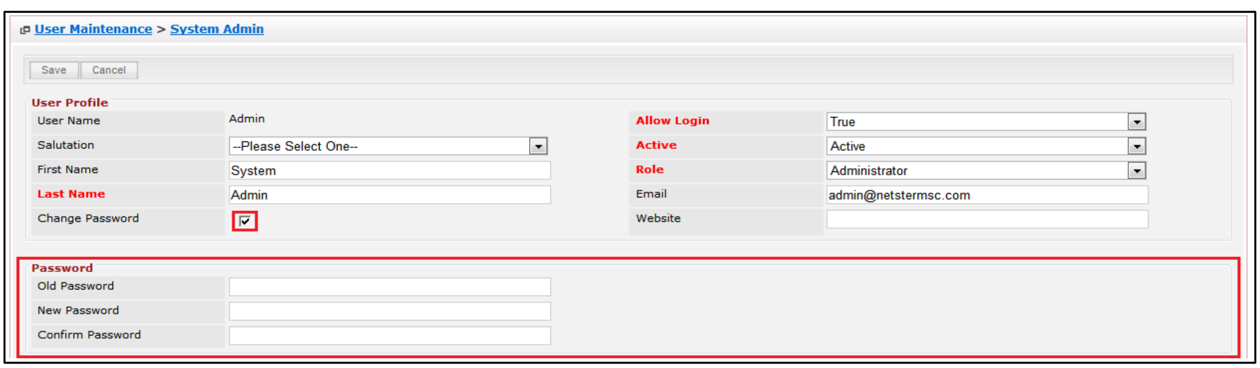


Figure 17.16: User Change Password

***Related Topics**: See "Edit User"*

Create New User

To create new user, click at the **Admin** menu at the Main Menu bar. Page will navigate to Admin Management Page. Click at the User Menu in Admin Management Page. Then click the Create New menu at the top of the **User Listing**. After clicking Create New menu, page will navigate to **User Maintenance** page. Enter the relevant details and click Save button to save the changes and navigates to **User Maintenance Detail** page.

There are **five** main sections to be filled in to create a new User: **User Profile**, **Password**, **Business Information**, **Correspondence Address** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **User Profile**

- Compulsory fields: **User Name**, **Allow Login**, **Active**, **Role**, and **Last Name**

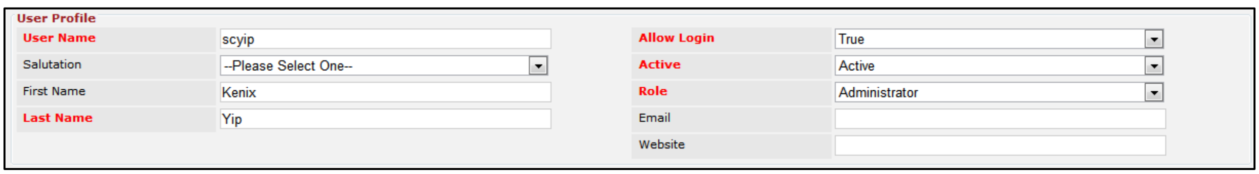


Figure 17.17: Create User - User Profile

- **User Name** is the ID that user used to login to the system. User Name must be unique. User will receive an error message showing "Invalid username. Please try another one."

Figure 17.18: Create User - User Details

- **Last Name** field will be the last name of the user for identification.
- **Allow Login** field defines if the user is allowed to login to the system. If **Allow Login** is set to **True**, user will be **able** to login to the system. Meanwhile, if **Allow Login** is set to be **False**, user will **not be able** to login to the system.
- **Active** field defines if the status of the user is **Active** or **Inactive**.
- **Role** field defines the user role in the system. If the user **Role** is **Administrator** or **Developer**, then the user will have **full access** to the system whereas if the user **Role** is **Agent**, then the user will ONLY have **partial access** to the system.

2) **Password**

- This section is for user to enter the login password for the user to login. Both New Password and Confirm Password field must match each other to be able to save the password.

Figure 17.19: Create User - Password

3) **Business Information**

- For user to enter some **Business Information** of the user such as **Job Title**, **Department**, **Organization**, **Reporting To** and **Employment Since**. (Optional)
- **Employment Tenure** field will be **auto-calculated** based on the **Employment Since** field.

Figure 17.20: Create User – Business Information

4) **Correspondence Address**

- For user to enter some **Correspondence Address** of the user – Home Address and Business Address. (Optional)

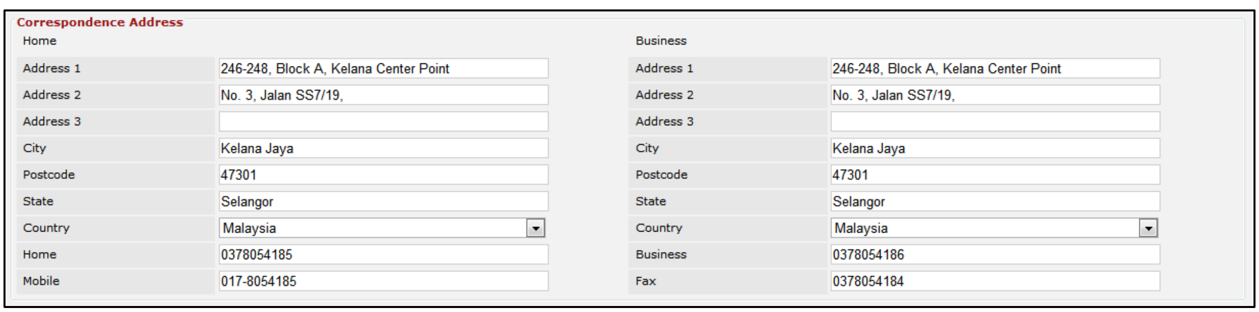


Figure 17.21: Create User – Correspondence Address

5) **Other Information**

- For user to enter some **Other Information** of the user such as **NRIC**, **Marital Status**, **Emergency Contact**, **Gender**, **Date of Birth**, **Age** and **Note**. (Optional)
- **Age** field will be **auto-calculated** based on the **Date of Birth** field.

Figure 17.22: Create User – Other Information

To cancel creating New User, click Cancel button and navigates back to the **User Listing** page.

Edit User

To edit user, click at the **Admin** menu at the Main Menu bar. Page will navigate to Admin Management Page. Click at the User Menu in Admin Management Page. Then click at the **Edit** button in **User Listing** page or click at the First Name or Last Name hyperlink in **User Listing** page then click the Edit button in **User Maintenance Edit** page. After clicking **Edit** button or Edit button, page will navigate to **User Maintenance** page. Edit the relevant details and click Save button to save the changes and navigates back to **User Maintenance Detail** page or click Save and Next button to save the changes and navigates to the **User Management Edit page** for the next record.

There are **four** main sections of User to be edited: **User Profile**, **Business Information**, **Correspondence Address** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **User Profile**

- Compulsory fields: **Allow Login**, **Active**, **Role**, and **Last Name**

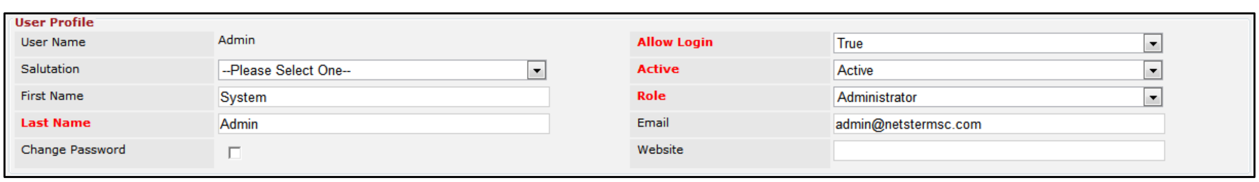


Figure 17.23: Edit User - User Profile

- **User Name** is not editable once created.
- **Last Name** field will be the last name of the user for identification.
- To change the user's password, check the Change Password checkbox, a Password section will appear for user to enter Old Password, New Password and Confirm Password.

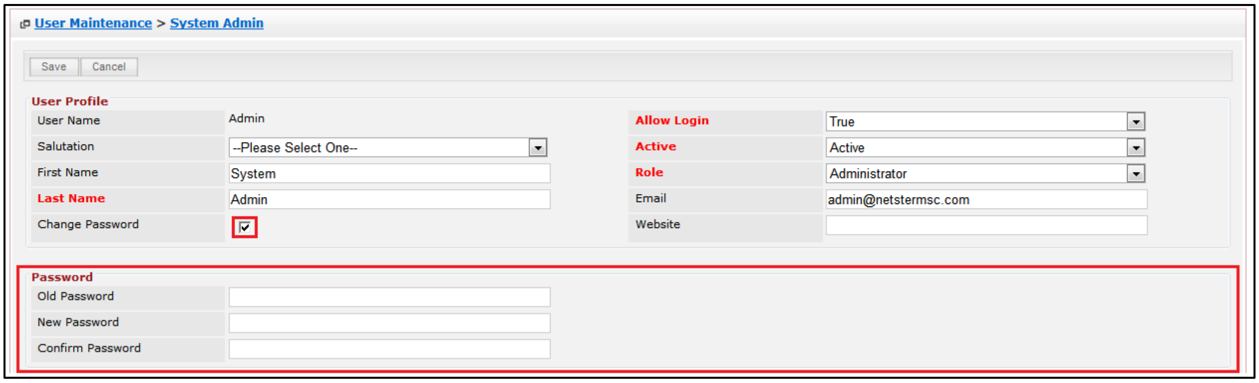


Figure 17.24: User Change Password

- **Allow Login** field defines if the user is allowed to login to the system. If **Allow Login** is set to **True**, user will be **able** to login to the system. Meanwhile, if **Allow Login** is set to be **False**, user will **not be able** to login to the system.
- **Active** field defines if the status of the user is **Active** or **Inactive**.
- **Role** field defines the user role in the system. If the user **Role** is **Administrator**, then the user will have **full access** to the system whereas if the user **Role** is **User**, then the user will ONLY have **partial access** to the system.

2) **Business Information**

- For user to enter some **Business Information** of the user such as **Job Title**, **Department**, **Organization**, **Reporting To** and **Employment Since**. (Optional)
- **Employment Tenure** field will be **auto-calculated** based on the **Employment Since** field.

Figure 17.25: Edit User – Business Information

3) **Correspondence Address**

- For user to enter some **Correspondence Address** of the user – Home Address and Business Address. (Optional)

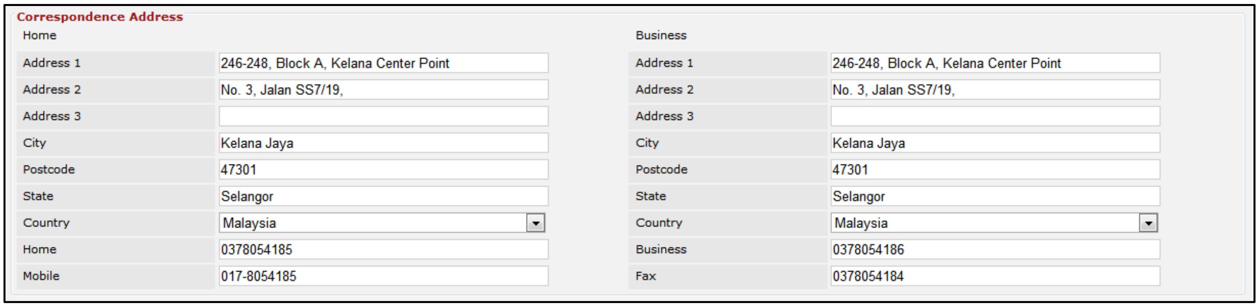


Figure 17.26: Edit User – Correspondence Address

4) **Other Information**

- For user to enter some **Other Information** of the user such as **NRIC**, **Marital Status**, **Emergency Contact**, **Gender**, **Date of Birth**, **Age** and **Note**. (Optional)
- **Age** field will be **auto-calculated** based on the **Date of Birth** field.

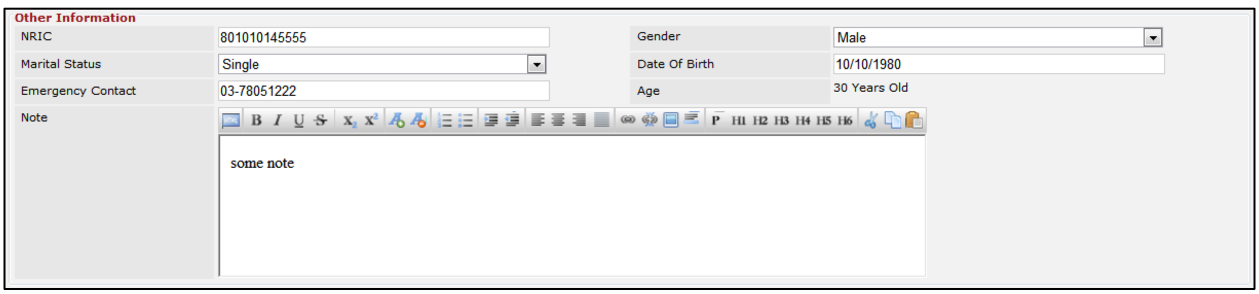


Figure 17.27: Edit User – Other Information

To cancel editing User, click Cancel button and navigates back to the **User Maintenance Detail** page.

User – Activities Subpanel

This subpanel contains any activities related to the user. **Call**, **Meeting** or **Task** created will be displayed in this **Activities** subpanel.

User – Activities Subpanel (New Call)

To create a New Call related to a User, click at the New Call menu at **Activities** subpanel. Once New Call menu is clicked, a Call Management window will pop up for user to create a New Call. Enter the details of the Call and click Save button to create the New Call. Or click Cancel menu to cancel creating New Call.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

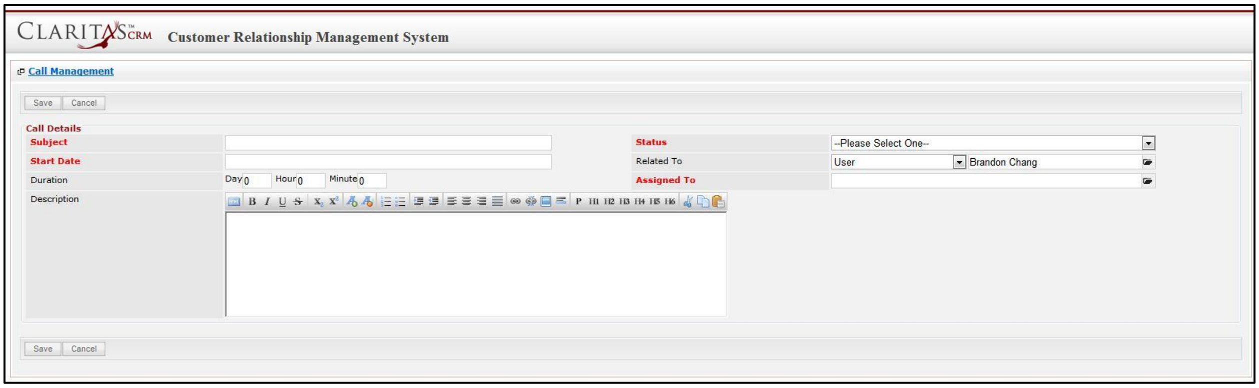


Figure 17.28: New Call Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **User**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Call. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Call is created. Click at the Done menu to set the date and time.

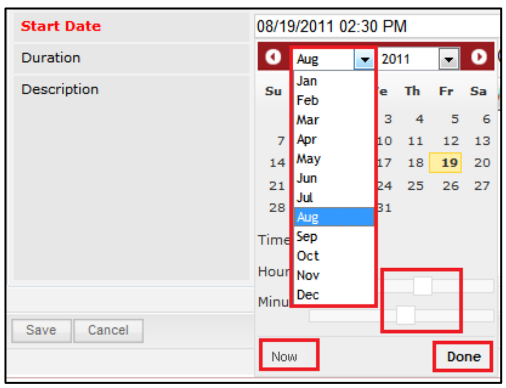


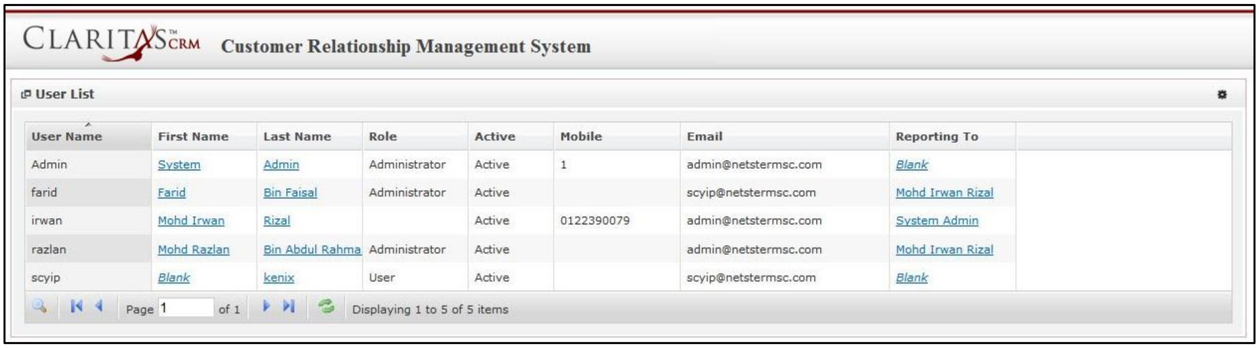
Figure 17.29: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Call for the related User. There are two ways of entering the Assigned To field:
  i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)

     OR

Figure 17.30: Assigned To Field Auto Complete Dropdown

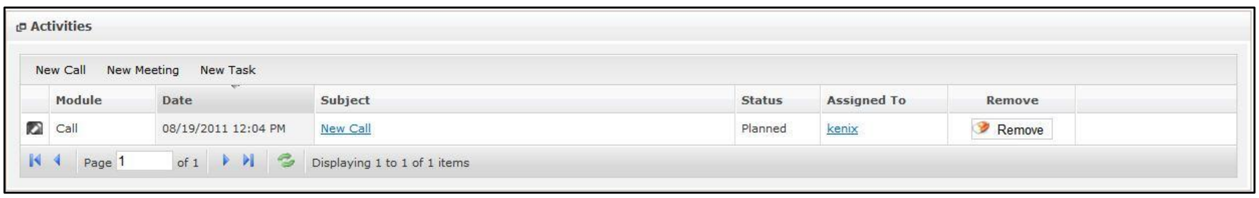
ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Figure 17.31: Assigned To Popup

- After a New Call is created, the subpanel will auto-refresh and display the newly-created Call.



Module	Date	Subject	Status	Assigned To	Remove
Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Figure 17.32: Activities Subpanel List New Call

To **cancel creating New Call**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Call and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** creating New Call and **navigate** to **Call Listing** page.

User – Activities Subpanel (New Meeting)

To create a New Meeting related to a User, click at the New Meeting menu at **Activities** subpanel. Once New Meeting menu is clicked, a Meeting Management window will pop up for user to create a New Meeting. Enter the details of the Meeting and click Save button to create the New Meeting. Or click Cancel menu to cancel creating New Meeting.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

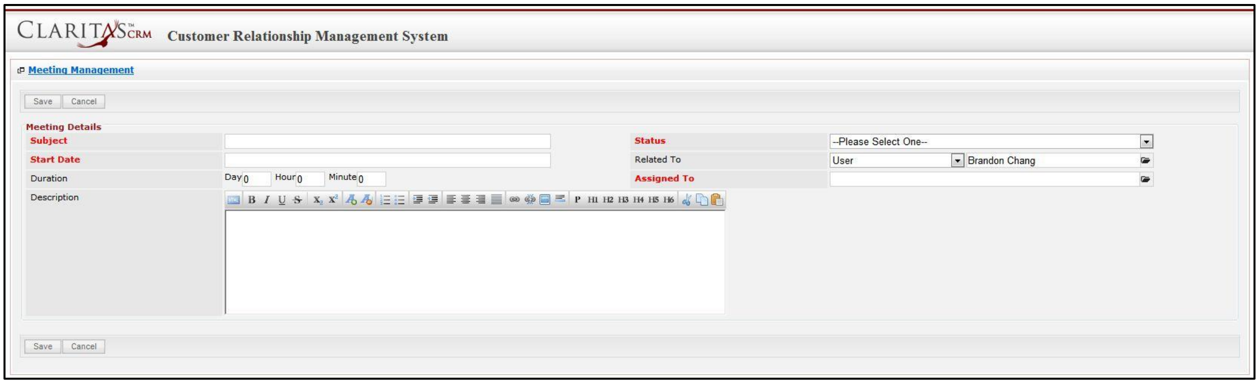


Figure 17.33: New Meeting Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **User**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Meeting. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Meeting is created. Click at the Done menu to set the date and time.

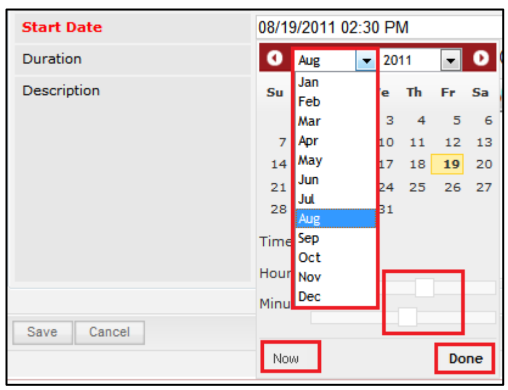


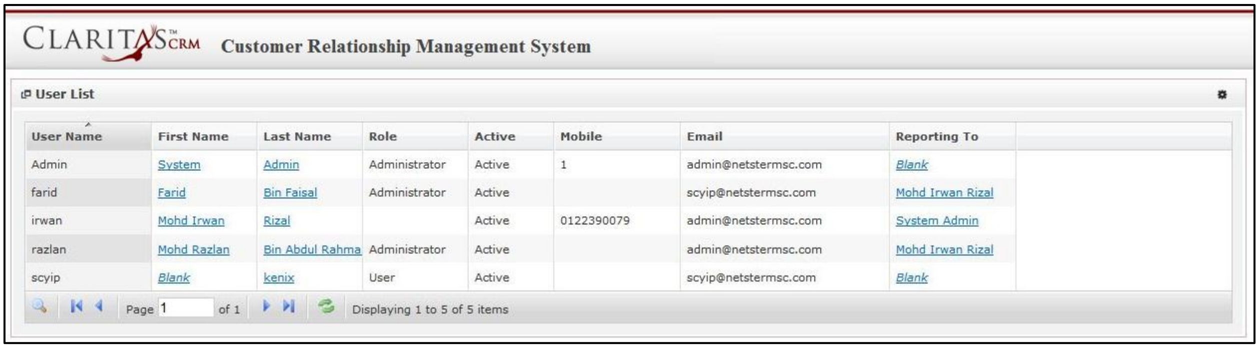
Figure 17.34: Start Date Time

- **Assigned To** field is to assign a User to in charge of the Meeting for the related User. There are two ways of entering the **Assigned To** field:
  i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)

     OR

Figure 17.35: Assigned To Field Auto Complete Dropdown

ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

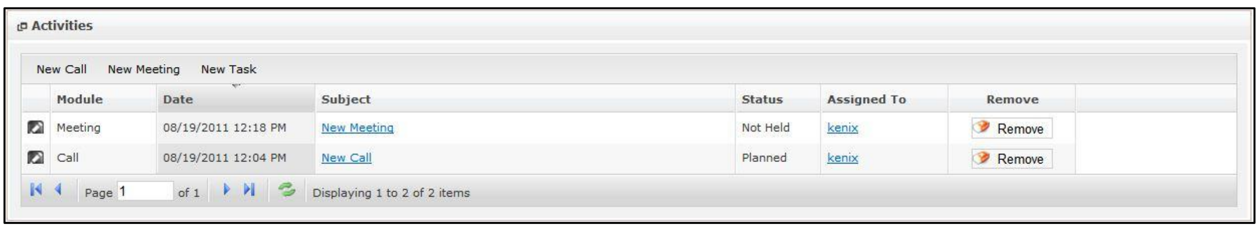


User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 17.36: Assigned To Popup

- After a New Meeting is created, the subpanel will auto-refresh and display the newly-created Meeting.



Module	Date	Subject	Status	Assigned To	Remove
Meeting	08/19/2011 12:18 PM	New Meeting	Not Held	kenix	Remove
Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Page 1 of 1 Displaying 1 to 2 of 2 items

Figure 17.37: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Meeting and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** creating New Meeting and **navigate** to **Meeting Listing** page.

User – Activities Subpanel (New Task)

To create a New Task related to a User, click at the New Task menu at **Activities** subpanel. Once New Task menu is clicked, a Task Management window will pop up for user to create a New Task. Enter the details of the Task and click Save button to create the New Task. Or click Cancel menu to cancel creating New Task.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

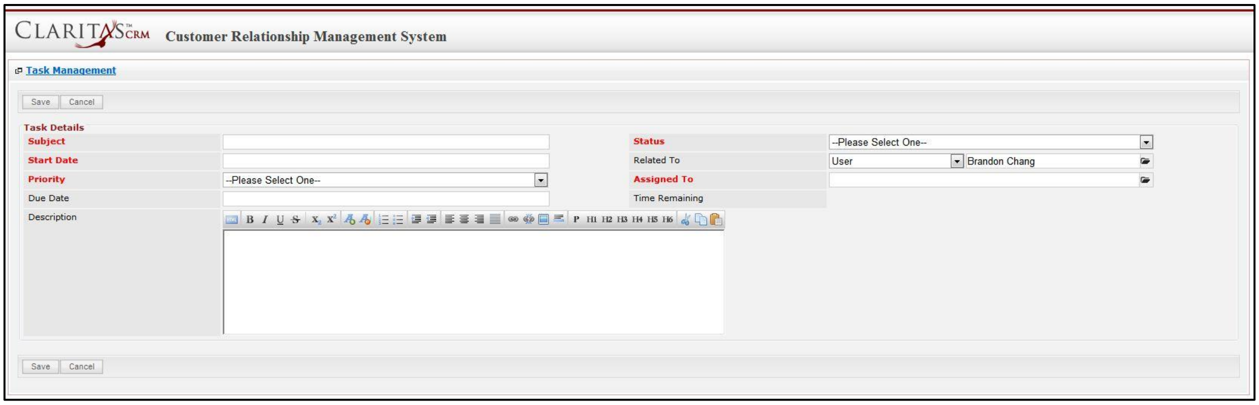


Figure 17.38: New Task Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Priority**, **Status**, and **Assigned To**.
- **Related To** field will auto populate the name of the related **User**.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Task. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Task is created. Click at the **Done** menu to set the date and time.

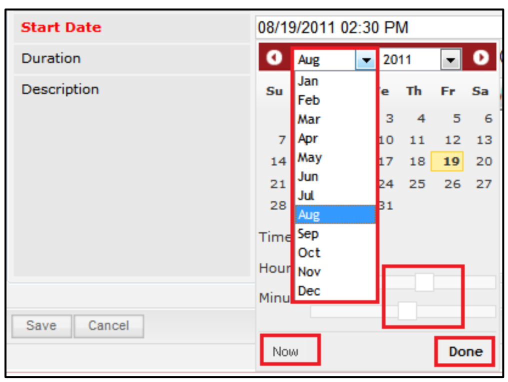


Figure 17.39: Start Date Time

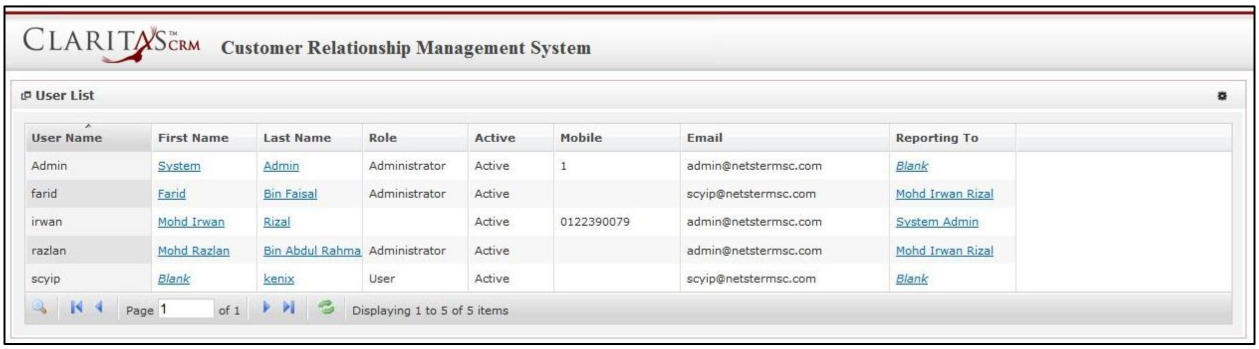
- **Priority** field once selected will auto-populate the **Due Date** field and **Time Remaining** accordingly. If the Priority is **High**, the task will be due the **same** day; if the Priority is **Medium**, the task will be due in **three** days; if the Priority is **Low**, the task will be due in **five** days;
- There are five **Statuses** available for Task- **Not Started**, **In Progress**, **Completed**, **Pending Input**, and **Deferred.**
- **Assigned To** field is to assign a User to in charge of the Task for the related User. There are two ways of entering the Assigned To field:
  i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available

users; the textbox will be auto-cleared. (Click at the User name to select the user)

OR

Figure 17.40: Assigned To Field Auto Complete Dropdown

ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

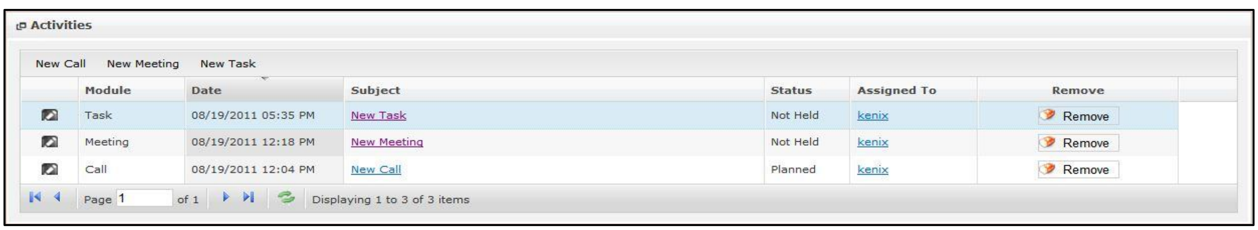


User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 17.41: Assigned To Popup

- After a New Task is created, the subpanel will auto-refresh and display the newly-created Task.



Module	Date	Subject	Status	Assigned To	Remove
Task	08/19/2011 05:35 PM	New Task	Not Held	kenix	Remove
Meeting	08/19/2011 12:18 PM	New Meeting	Not Held	kenix	Remove
Call	08/19/2011 12:04 PM	New Call	Planned	kenix	Remove

Page 1 of 1 Displaying 1 to 3 of 3 items

Figure 17.42: Activities Subpanel List New Task

To **cancel creating New Task**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Task and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** creating New Task and **navigate** to **Task Listing** page.

User – History Subpanel

This subpanel contains any history or note related to the user.

User – History Subpanel (New Note)

To create a New Note related to a User, click at the New Note menu at **History** subpanel. Once New Note menu is clicked, a Note Management window will pop up for user to create a New Note.

Enter the details of the Note and click Save button to create the New Note.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

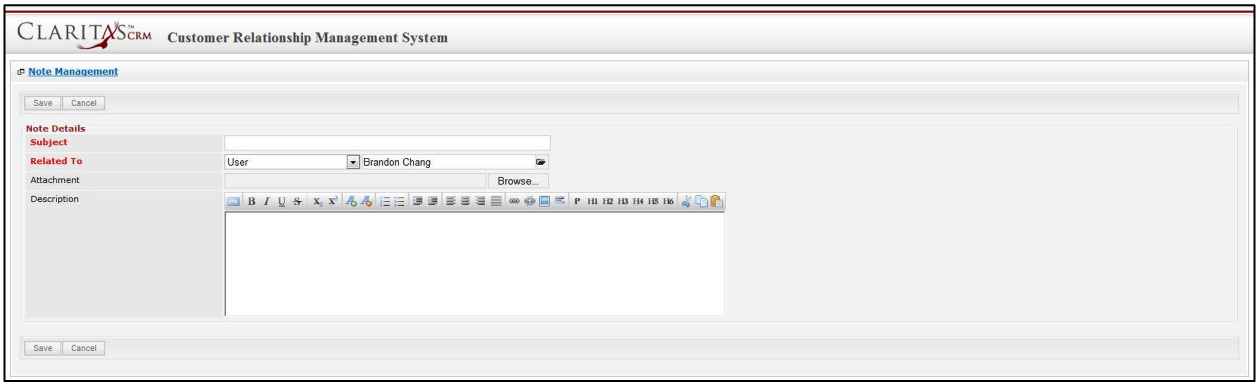


Figure 17.43: New Note Management Popup

Compulsory fields: **Subject**, and **Related To**.

- **Related To** field will auto populate the name of the related **User**.
- **Attachment** field allow file extensions are as below (format that is not stated are not allowed to be uploaded):
    - **Documents:** .doc, .docx, .xls, .xlsx, . rtf, .txt, .pdf, .ppt, .pptx
    - **Pictures:** .jpg, .bmp, .png, .bmp, .gif
    - **Audio:** .mp3, .wma
    - **Video:** .3gp, .mp4, .rmvb, .avi, .flv
    - **Archive:** .zip, .rar
- After a New Task is created, the subpanel will auto-refresh and display the newly-created Note.

Figure 17.44: History Subpanel List New Task

To **cancel creating New Note**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Note and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** creating New Note and **navigate** to **Note Listing** page.

User – Direct Report Subpanel

This subpanel contains user directly reports to the **User**.

Create New User

To create a New User directly reports to a User, click at the Create New menu at **User List** subpanel.

Once Create New menu is clicked, a User Management window will pop up for user to create a New User.

Enter the details of the User and click Save button to create the New User.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

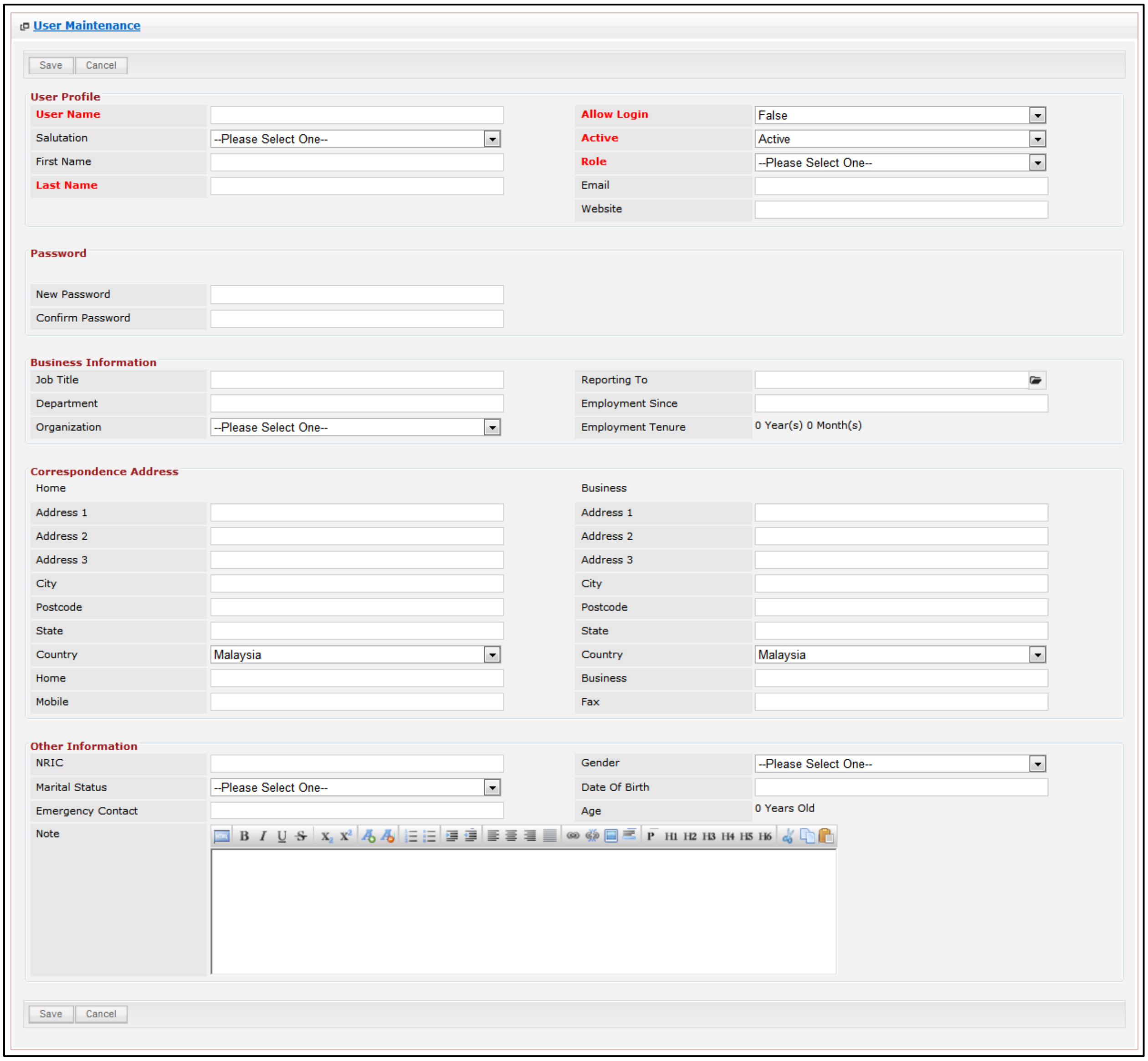


Figure 17.45: New User Management Popup

Compulsory fields: **User Name**, **Allow Login**, **Active**, **Role**, and **Last Name**

There are **five** main sections to be filled in to create a new User: **User Profile**, **Password**, **Business Information**, **Correspondence Address** and **Other Information**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **User Profile**

- Compulsory fields: **User Name**, **Allow Login**, **Active**, **Role**, and **Last Name**

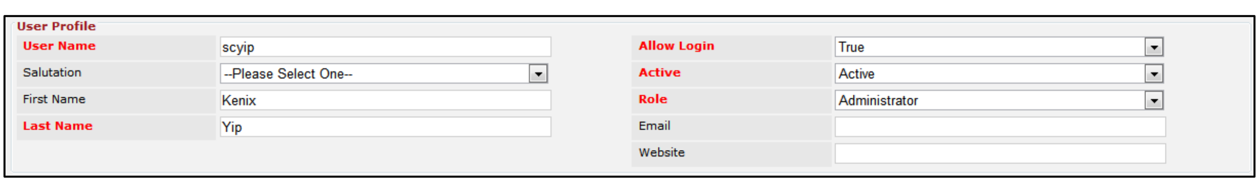


Figure 17.46: Create User - User Profile

- **User Name** is the ID that user used to login to the system. User Name must be unique. User will receive an error message showing "Invalid username. Please try another one."

Figure 17.47: Create User - User Details

- **Allow Login** field defines if the user is allowed to login to the system. If **Allow Login** is set to **True**, user will be **able** to login to the system. Meanwhile, if **Allow Login** is set to be **False**, user will **not be able** to login to the system.
- **Active** field defines if the status of the user is **Active** or **Inactive**.
- **Role** field defines the user role in the system. If the user **Role** is **Administrator**, then the user will have **full access** to the system whereas if the user **Role** is **User**, then the user will ONLY have **partial access** to the system.
- **Last Name** field will be the last name of the user for identification.

2) **Password**

- This section is for user to enter the login password for the user to login. Both New Password and Confirm Password field must match each other to be able to save the password.

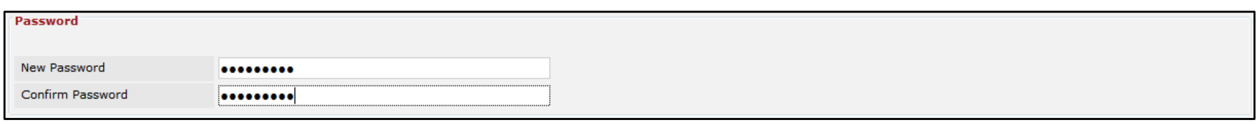


Figure 17.48: Create User - Password

3) **Business Information**

- For user to enter some **Business Information** of the user such as **Job Title**, **Department**, **Organization**, **Reporting To** and **Employment Since**. (Optional)
- **Employment Tenure** field will be **auto-calculated** based on the **Employment Since** field.

Figure 17.49: Create User – Remarks

4) **Correspondence Address**

- For user to enter some **Correspondence Address** of the user – Home Address and Business Address. (Optional)

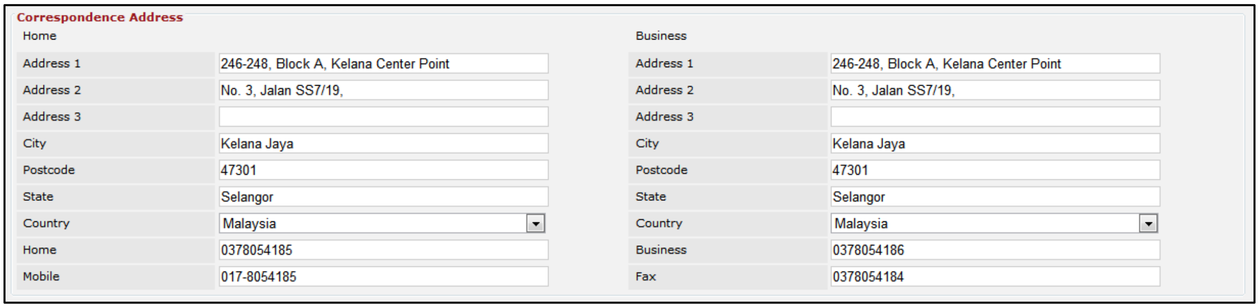


Figure 17.50: Create User – Correspondence Address

5) **Other Information**

- For user to enter some **Other Information** of the user such as **NRIC**, **Marital Status**, **Emergency Contact**, **Gender**, **Date of Birth**, **Age** and **Note**. (Optional)
- **Age** field will be **auto-calculated** based on the **Date of Birth** field.

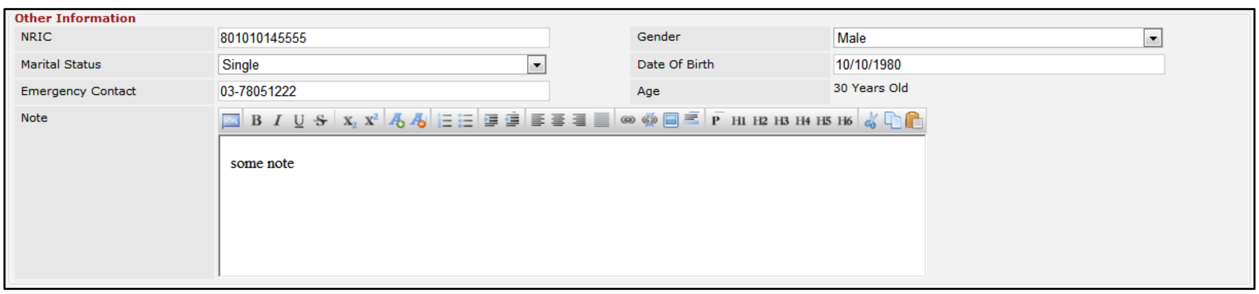


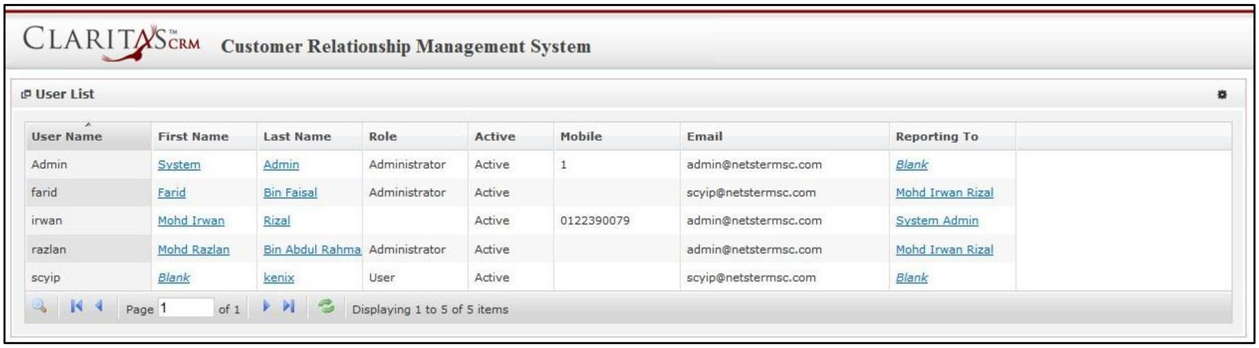
Figure 17.51: Create User – Other Information

To **cancel creating New User**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New User and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** creating New User and **navigate** to **User Listing** page.

Select User

To select a **User** to this **User**, click at the Select menu. Once Select menu is clicked, a **User List** window will pop up for user to select a **User**. Click at the **First Name** or **Last Name** hyperlink in **First Name** or **Last Name column** to select the **User** that associate with this **User**.



CLARITAS CRM Customer Relationship Management System

User List

User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal		Active	0122390079	admin@netstermsc.com	System Admin
razlan	Mohd Razlan	Bin Abdul Rahma	Administrator	Active		admin@netstermsc.com	Mohd Irwan Rizal
scyip	Blank	kenix	User	Active		scyip@netstermsc.com	Blank

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 17.52: Select User Popup

18 Admin – Role

This module is to **create and store Role details**.

Role Listing

To view Role Listing, click at the **Admin** menu at the Main Menu bar.

Figure 18.1: Admin Menu in Main Menu

Page will navigate to Admin Management Page. Click at the Role Menu in Admin Management Page.

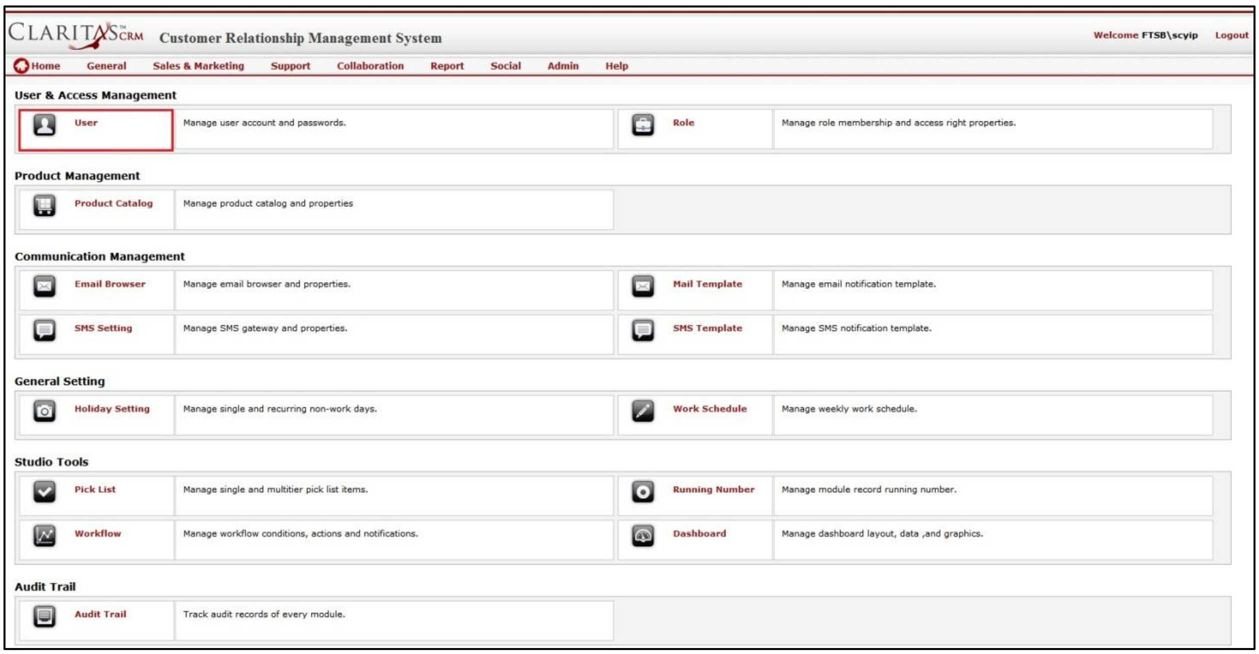


Figure 18.2: Role Menu in Admin Management Page

Page will load the list of the Role available in the system.

Figure 18.3: Role Listing

To view the Role Details, click at the Role Name hyperlink in Role Name column.

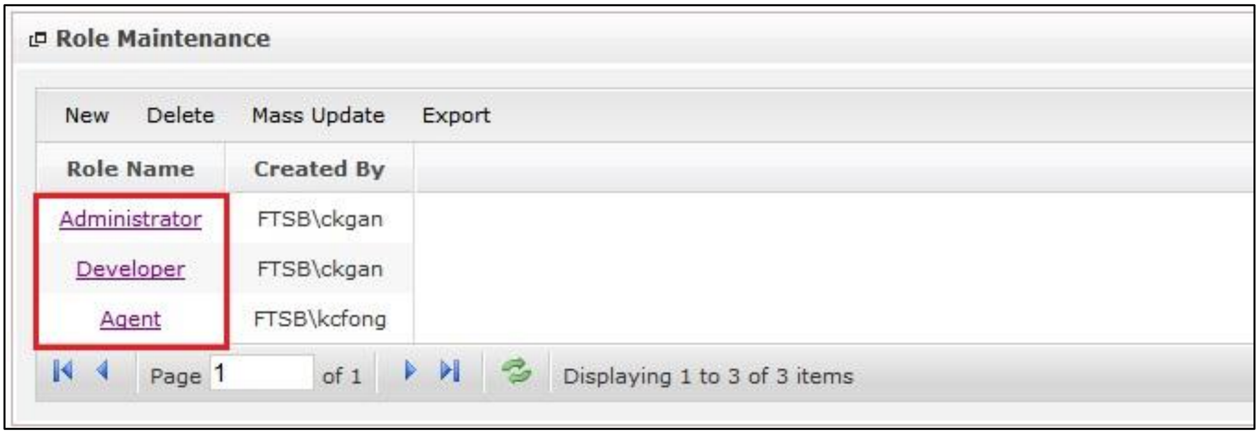


Figure 18.4: Role Name Hyperlink

After clicking the Role Name hyperlink, page will navigate to the **Role Maintenance Detail** page which displays all the details of the Role.

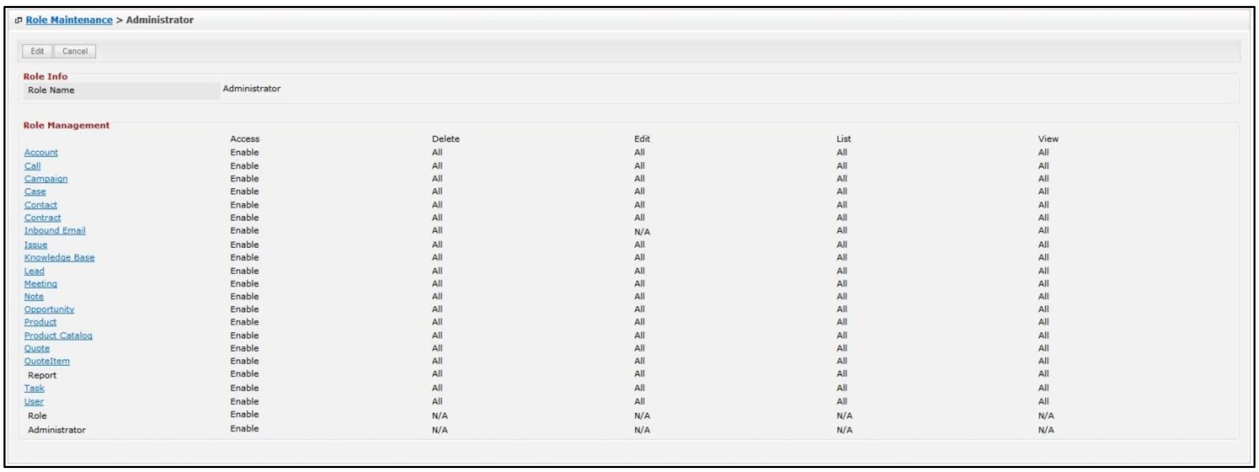


Figure 18.5: Role Maintenance Detail Page

To create a new role, click at New menu at the top of the Role Listing.

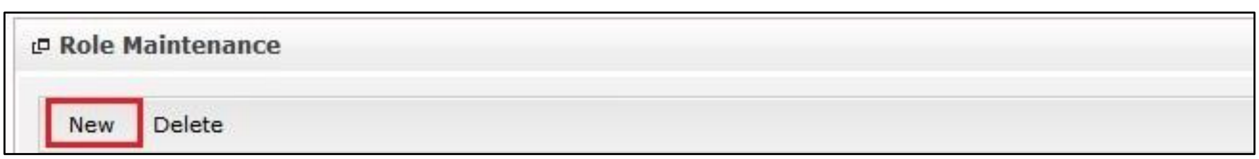


Figure 18.6: Create New Role Menu

After clicking New menu, page will navigate to **Role Maintenance** page. Enter the name of the Role and select the relevant access and click Save button to save the changes and navigates to **Role Maintenance Detail** page or click Cancel button to cancel creating and navigates back to the **Role Listing** page.

***Related Topics**: See “[Create New Role]”*

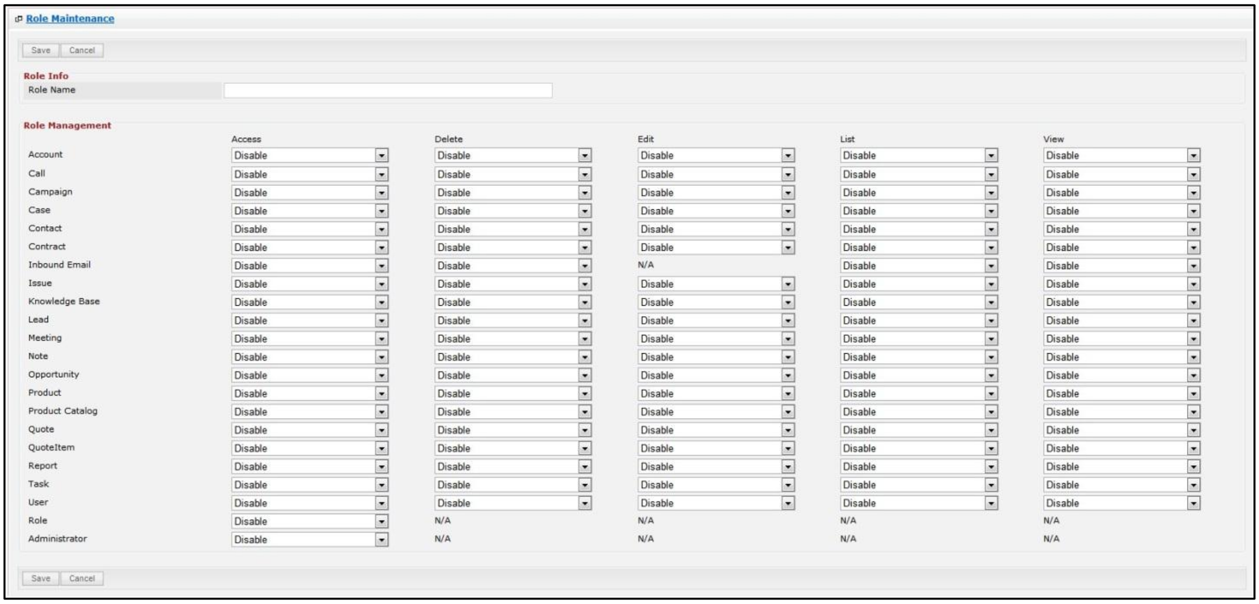


Figure 18.7: Role Maintenance Create New Page

To **delete** a role, select the record and click **Actions > Delete**.

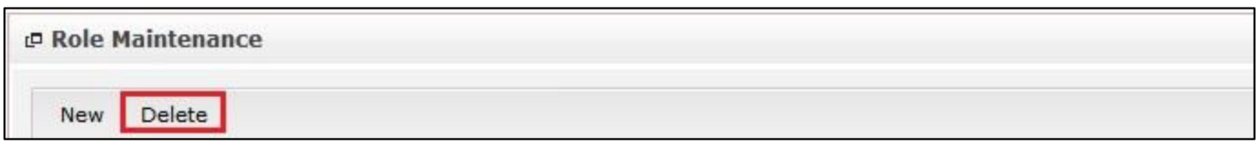


Figure 18.8: Action > Delete Menu

A confirmation message box will prompt for confirmation to delete the role. Click Yes button to **confirm**.

Clicking No button will **cancel** deleting Role and **close** the confirmation message box.

Figure 18.9: Delete Confirmation Message Box

Deleted role will **no longer** be displayed in Role Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To go to the First Page of the listing, click at the **First Page** button.

To go to the Previous Page of the listing, click at the **Previous Page** button.

To go to the Next Page of the listing, click at the **Next Page** button.

To go to the Last Page of the listing, click at the **Last Page** button.

To refresh the listing page, click at the **Refresh** button.

There are two ways to edit Role. First, click at the Role hyperlink, then click the Edit button in **Role Maintenance Detail** page. After clicking at the **Edit** Edit button page will navigate to the **Role Maintenance Edit** page.

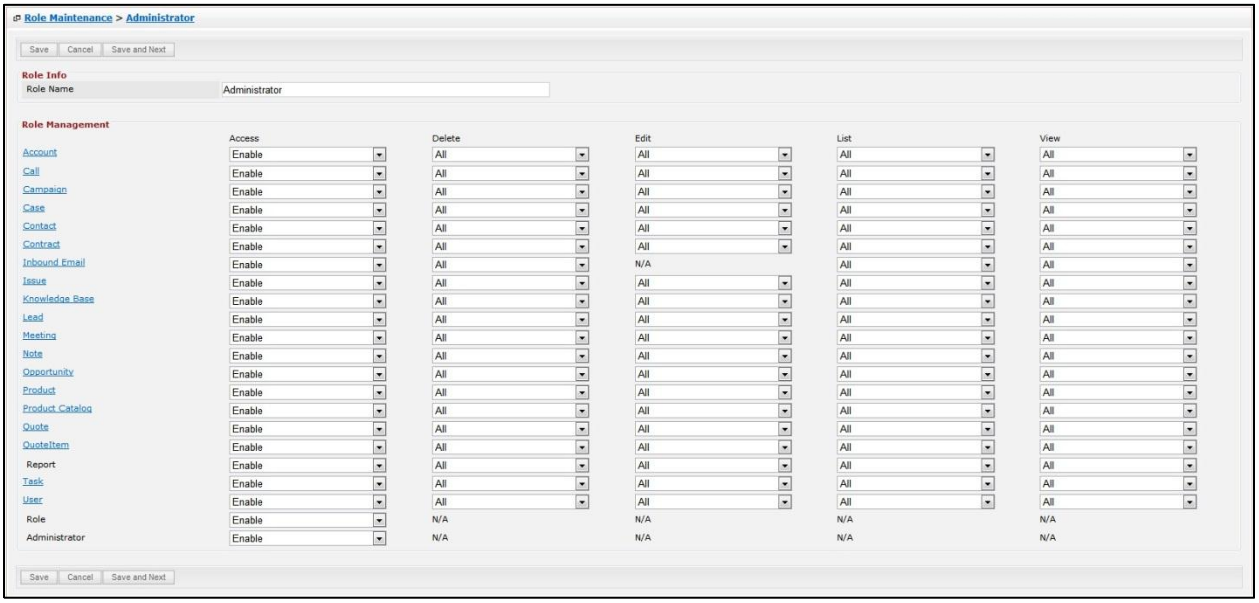


Figure 18.10: Role Maintenance Edit Page

Edit the relevant access and click Save button to save the changes and navigates back to **Role Maintenance Detail** page. Or click Cancel button to cancel editing and navigates back to the **Role Maintenance Detail** page.

Second way to edit Role is to double-click at the access fields and edit the fields in **Role Maintenance Detail** page.

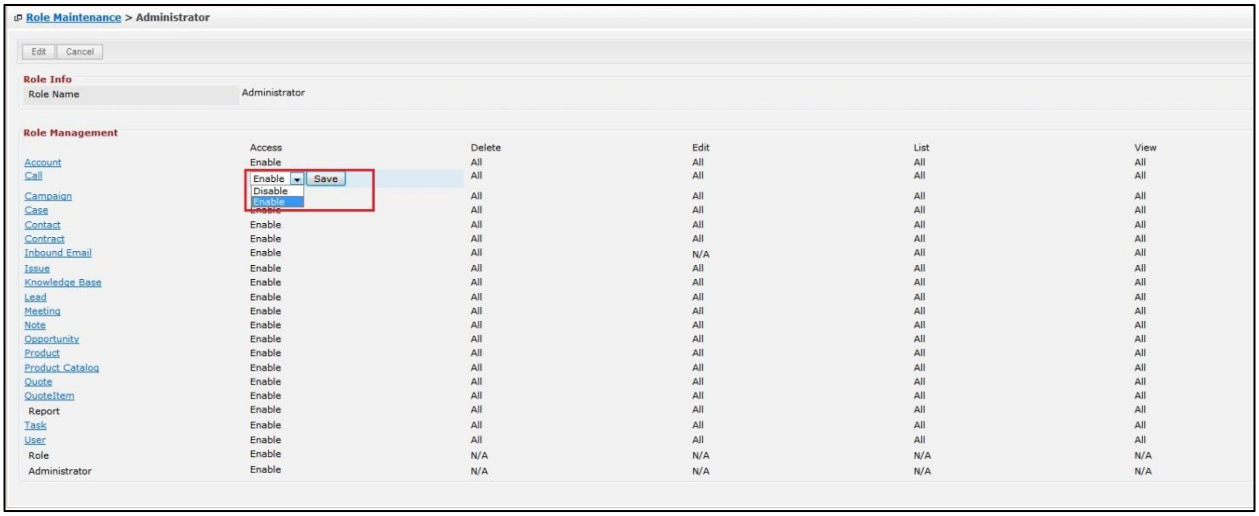


Figure 18.11: On-Click Edit Role

Edit the relevant access and click Save button to save the changes.

***Related Topics**: See "[Edit Role]"*

Create New Role

To create new user, click at the **Admin** menu at the Main Menu bar. Page will navigate to Admin Management Page. Click at the User Menu in Admin Management Page. Then click the Create New menu at the top of the **Role Listing**. After clicking Create New menu, page will navigate to **Role Maintenance** page. Enter the name of the Role and select the relevant access and click Save button to save the changes and navigates to **Role Maintenance Detail** page or click Cancel button to cancel creating and navigates back to the **Role Listing** page.

There are only **two** main sections to be filled in to create a new Role: **Role Info** and **Role Management**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Role Info**
   - **Role Name** field is for user to enter the name of the role for identification.

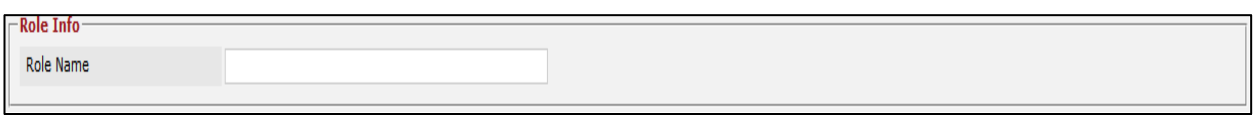


Figure 18.12: Role Name Text Box

2) **Role Management**

- This section is for Administrator to management the **Access Right** of a user group **Module Level** and **Field Level**.
- **Access** is the **Module Level Access Right**. There are **two** options for Module Level Access which are: **Disable** or **Enable**.
    - **Module Access Right** is "**Disable":**
        - If a **Module Access Right** is "**Disable"**, then all the users in the Role Group will **not be able** to access the module. i.e. If the **Module Access Right** for **Report** module is "**Disable**", then there will be **no Report menu** at the **Main Menu**.
    - **Module Access Right** is "**Enable**":
        - In contrary, if the **Module Access Right** is "**Enable**", then all the users in the Role Group will be **able** to access the module.
- **Delete**, **Edit**, **List** and **View** are the **Field Access Right**. There are **four** options for Field Level Access which are: **Disable**, **Owner**, **Hierarchy** and **All**.
    - **Field Access Right** is "**Disable**":
        - If the **Field Access Right** is "**Disable**", then all the users in Role Group will **not be able** to access the field. i.e. If **Delete Field Access Right** is "**Disable**" then there will be **no Delete menu** at the **Actions Menu**, thus user will not be able to delete any record.
    - **Field Access Right** is "**Owner**":
        - If the **Field Access Right** is "**Owner**", then only the owner of the record (User that creates the record) in Role Group will **be able** to access the field. i.e. If **Delete Field Access Right** is "**Owner**" then only the owner of the record will have the **Delete menu** at the **Actions Menu**, thus only the owner of the record will be able to delete the record created by him/her.
    - **Field Access Right** is "**Hierarchy**":
        - If the **Field Access Right** is "**Hierarchy**", then only the owner or the superior of the owner of the record (User that creates the record or the superior of the owner that creates the record) in Role Group will **be able** to access the field. i.e. If **Delete Field Access Right** is "**Hierarchy**" then only the owner or the superior of the owner of the record will have the **Delete menu** at the

Actions Menu, thus only the owner or the superior of the owner of the record will be able to delete the record created by him/her. A user name scyip is reporting to another user name farid, then farid is the superior of scyip.

- **Field Access Right** is "**All**":
  - If the **Field Access Right** is "**All**", then all the users in Role Group will **be able** to access the field. i.e. If **Delete Field Access Right** is "**All**" then there will be **Delete menu** at the **Actions Menu**, thus all users will be able to delete any record.

To **cancel creating New Role**, click Cancel button. Page will navigate back to **Role Listing** page.

Edit Role

To edit role, click at the **Admin** menu at the Main Menu bar. Page will navigate to Admin Management Page. Click at the User Menu in Admin Management Page. Click at the <u>Role Name</u> hyperlink in **Role Listing** page. Click the Edit button in **Role Maintenance Detail** page or double-click at the access fields and edit the fields in **Role Maintenance Detail** page. After clicking Edit button, page will navigate to **Role Maintenance Edit** page. Edit the relevant details and click Save button to save the changes and navigates back to **User Maintenance Detail** page or click Save and Next button to save the changes and navigates to the **User Management Edit page** for the next record.

There are **two** main sections to be edited: **Role Info** and **Role Management**.

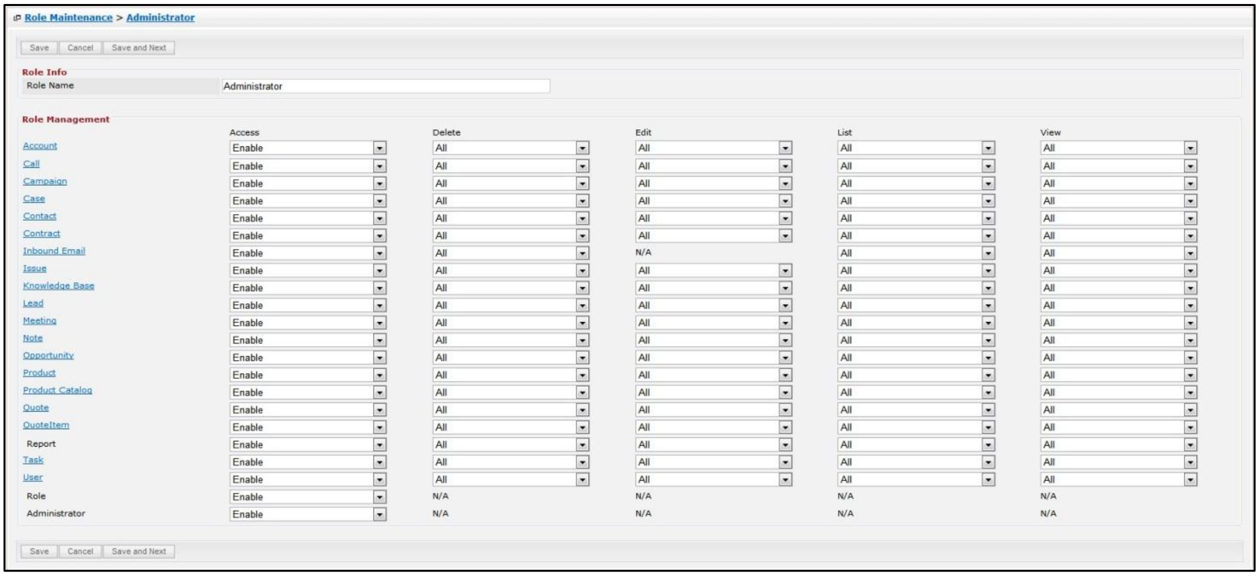
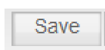


Figure 18.13: Role Maintenance Edit Page

Edit the relevant access and click 

button to save the changes and navigates back to **Role Maintenance Detail** page.

1) **Role Info**

   - **Role Name** field is for user to enter the name of the role for identification.

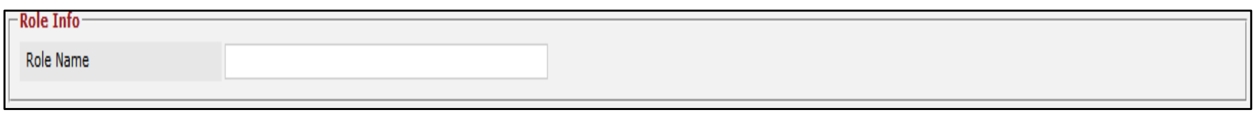
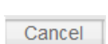


Figure 18.14: On-Click Edit Role

2) **Role Management**

   - This section is for Administrator to management the **Access Right** of a user group **Module Level** and **Field Level**.
   - **Access** is the **Module Level Access Right**. There are **two** options for Module Level Access which are: **Disable** or **Enable**.
     - **Module Access Right** is **"Disable":**
       - If a **Module Access Right** is **"Disable"**, then all the users in the Role Group will **not be able** to access the module. i.e. If the **Module Access Right** for **Report** module is "**Disable**", then there will be **no Report menu** at the **Main Menu**.
     - **Module Access Right** is "**Enable**":
       - In contrary, if the **Module Access Right** is "**Enable**", then all the users in the Role Group will be **able** to access the module.

- **Delete**, **Edit**, **List** and **View** are the **Field Access Right**. There are **four** options for Field Level Access which are: **Disable**, **Owner**, **Hierarchy** and **All**.
    - **Field Access Right** is “**Disable**”:
        - If the **Field Access Right** is “**Disable**”, then all the users in Role Group will **not be able** to access the field. i.e. If **Delete Field Access Right** is “**Disable**” then there will be **no Delete menu** at the **Actions Menu**, thus user will not be able to delete any record.
    - **Field Access Right** is “**Owner**”:
        - If the **Field Access Right** is “**Owner**”, then only the owner of the record (User that creates the record) in Role Group will **be able** to access the field. i.e. If **Delete Field Access Right** is “**Owner**” then only the owner of the record will have the **Delete menu** at the **Actions Menu**, thus only the owner of the record will be able to delete the record created by him/her.
    - **Field Access Right** is “**Hierarchy**”:
        - If the **Field Access Right** is “**Hierarchy**”, then only the owner or the superior of the owner of the record (User that creates the record or the superior of the owner that creates the record) in Role Group will **be able** to access the field. i.e. If **Delete Field Access Right** is “**Hierarchy**” then only the owner or the superior of the owner of the record will have the **Delete menu** at the **Actions Menu**, thus only the owner or the superior of the owner of the record will be able to delete the record created by him/her. A user name scyip is reporting to another user name farid, then farid is the superior of scyip.
    - **Field Access Right** is “**All**”:
        - If the **Field Access Right** is “**All**”, then all the users in Role Group will **be able** to access the field. i.e. If **Delete Field Access Right** is “**All**” then there will be **Delete menu** at the **Actions Menu**, thus all users will be able to delete any record.

To cancel editing role, click 

button and navigates back to the **Role Maintenance Detail** page.

Second way to edit Role is to double-click at the access fields and edit the fields in **Role Maintenance Detail** page.

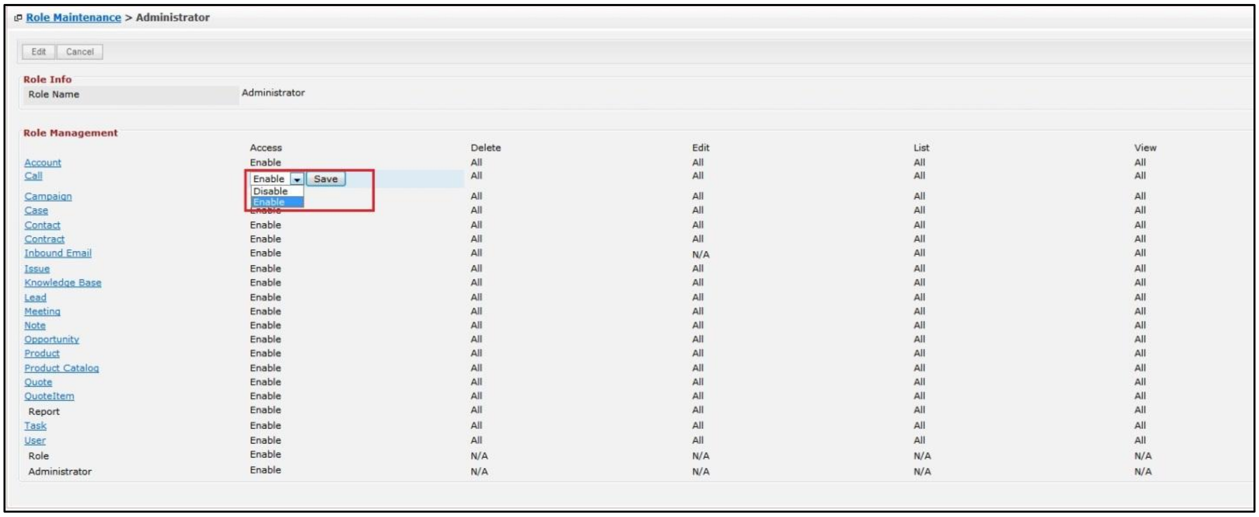
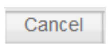


Figure 18.15: On-Click Edit Role

To cancel editing role, click  button and navigates back to the **Role Listing** page.

19 Admin – Product Catalog

This module is to **create and store Product Catalog details**.

Product Catalog Listing

To view Product Catalog Listing, click at the **Admin** menu at the Main Menu bar.

Figure 19.1: Admin Menu in Main Menu

Page will navigate to Admin Management Page. Click at the User Menu in Admin Management Page.

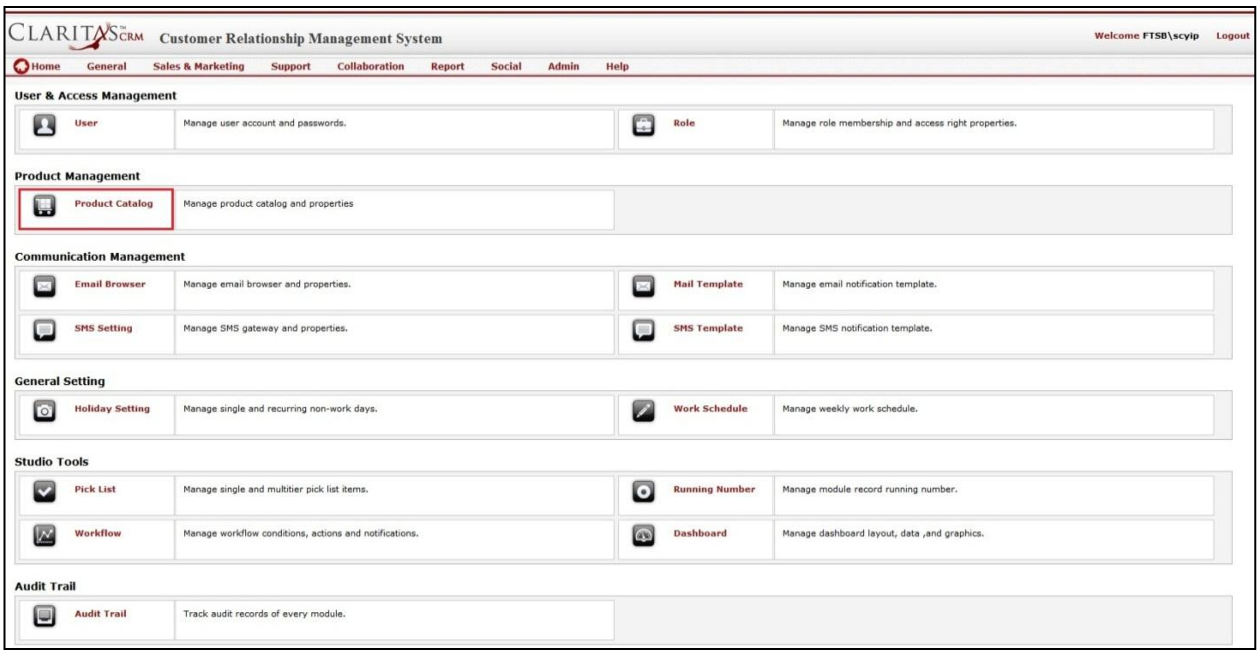


Figure 19.2: Product Catalog Menu in Admin Management Page

Page will load the list of the Product Catalog available in the system.

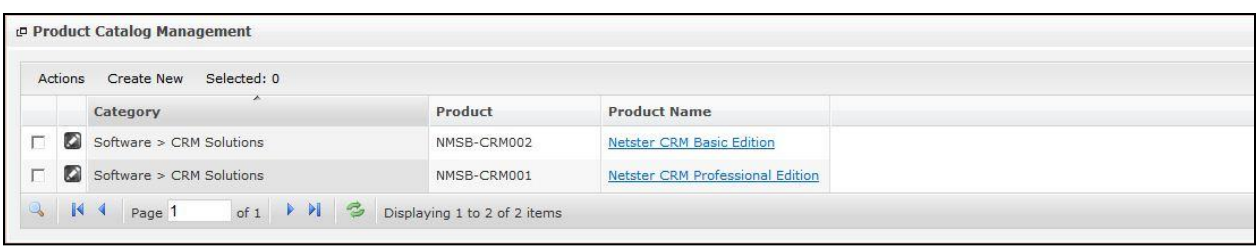


Figure 19.3: Product Catalog Listing

To view the Product Catalog Details, click at the Product Catalog ID hyperlink in Product Catalog column.

Figure 19.4: Product Catalog ID Hyperlink

After clicking the Product Catalog ID hyperlink, page will navigate to the **Product Catalog Management Detail** page which displays all the details of the Product Catalog include related **Activities**, **History** and **Knowledge Base**.

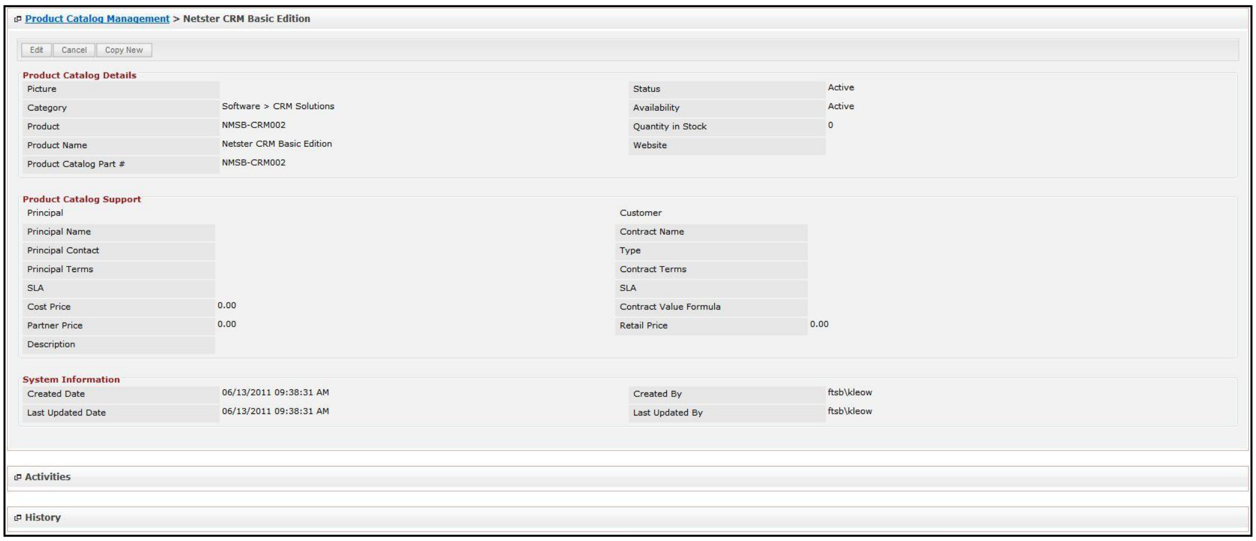


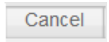
Figure 19.5: Product Catalog Management Detail Page

To copy the entire record and save as a new record, click Copy New button at **User Maintenance Detail** page.

To create a new Product Catalog, click at Create New menu at the top of the Product Catalog Listing.

Figure 19.6: Create New Product Catalog Menu

After clicking Create New menu, page will navigate to **Product Catalog Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Product Catalog**

Management Detail page or click  button to cancel creating and navigates back to the **Product Catalog Listing** page.

***Related Topics**: See "[Create New Product Catalog]"*

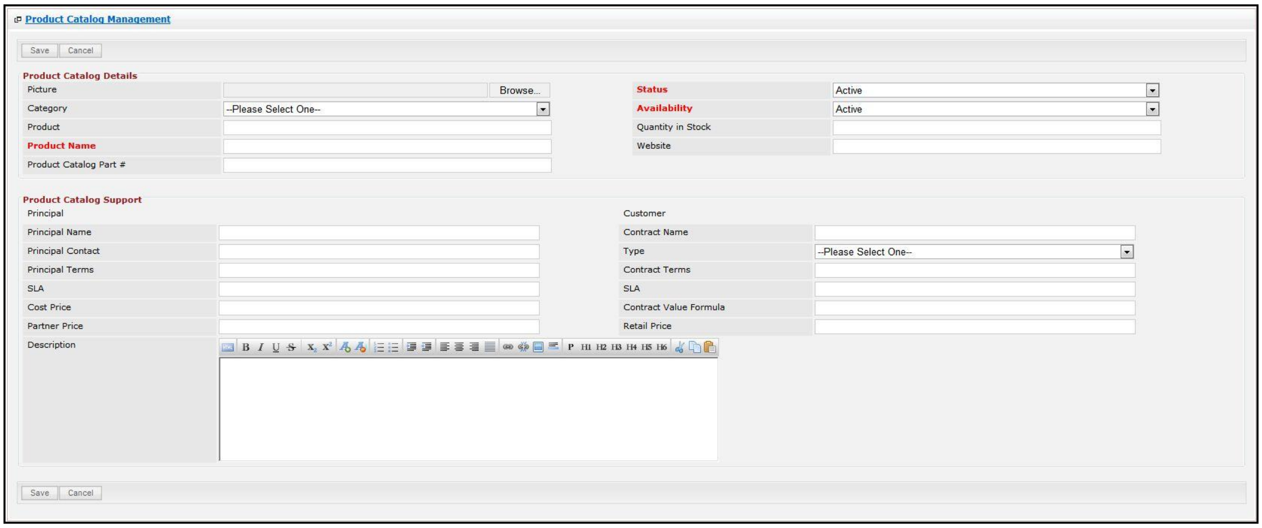


Figure 19.7: Product Catalog Management Create New Page

To **delete** a Product Catalog, select the record and click **Actions > Delete**.

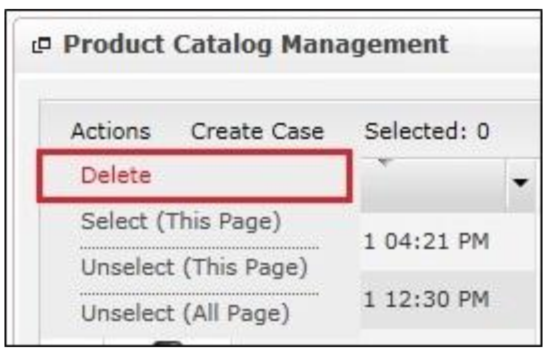


Figure 19.8: Action > Delete Menu

Message showing "**You have successful deleted 1 record(s).**" will be displayed to show that the deletion is successful.

Figure 19.9: Message Showing Product Catalog Deleted Successfully

Deleted Product Catalog will **no longer** be displayed in Product Catalog Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To select all records in the particular page, click **Actions > Select (This Page)**.

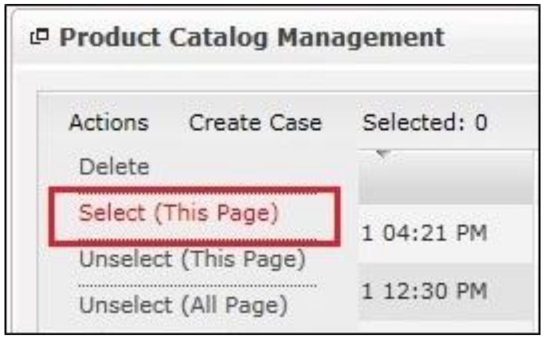


Figure 19.10: Actions > Select (This Page) Menu

To unselect all the selected records in the particular page, click **Actions > Unselect (This Page)**.

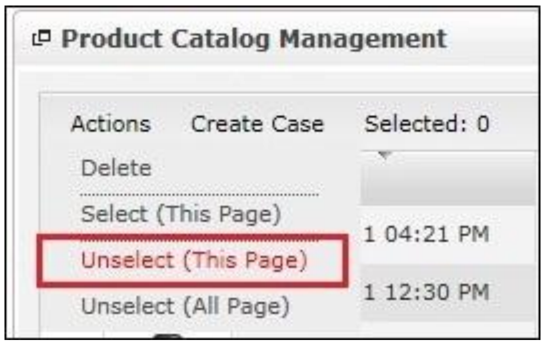


Figure 19.11: Actions > Unselect (This Page) Menu

To unselect all the selected records in all pages, click **Actions > Unselect (All Pages)**.

Figure 19.12: Actions > Unselect (All Pages) Menu

To go to the First Page of the listing, click at the **First Page**  button.

To go to the Previous Page of the listing, click at the **Previous Page**  button.

To go to the Next Page of the listing, click at the **Next Page**  button.

To go to the Last Page of the listing, click at the **Last Page**  button.

To refresh the listing page, click at the **Refresh**  button.

To edit the details of the Product Catalog, click at the **Edit** button or click the button in **Product Catalog Management Detail** page. After clicking at the **Edit** button page will navigate to the **Product Catalog Management Edit** page.

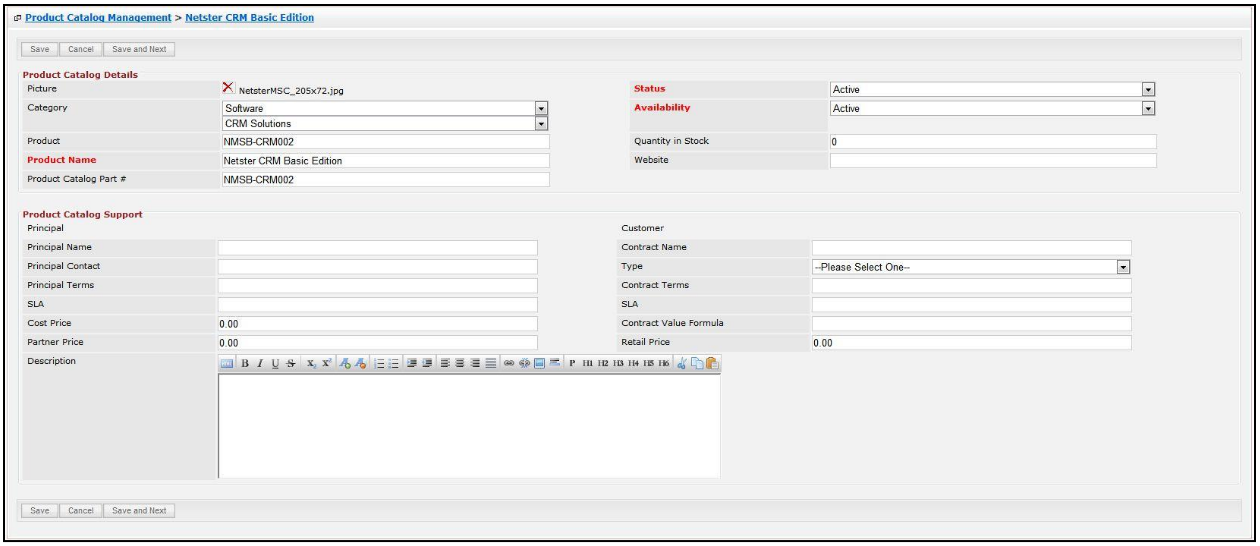


Figure 19.13: Product Catalog Management Edit Page

Edit the relevant details and click button to save the changes and navigates back to **Product Catalog Management Detail** page or click button to save the changes and navigates to the **Product Catalog Management Edit** page of the next Product Catalog. Or click button to cancel editing and navigates back to the **Product Catalog Management Detail** page.

***Related Topics**: See "Edit Product Catalog"*

Create New Product Catalog

To create new Product Catalog, click at the **Admin** menu at the Main Menu bar. Page will navigate to Admin Management Page. Click at the Product Catalog Menu in Admin Management Page. Then click the Create New menu at the top of the **Product Catalog Listing**. After clicking Create New menu, page will navigate to **Product Catalog Management** page. Enter the relevant details and click Save button to save the changes and navigates to **Product Catalog Management Detail** page.

There are **two** main sections to be filled in to create a new Product Catalog: **Product Catalog Details** and **Product Catalog Support.**

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Product Catalog Details**

- Compulsory fields: **Product Name**, **Status** and **Availability**.

Figure 19.14: Create Product Catalog - Product Catalog Details

- **Product Name** field will be the Product Name for identification.
- **Status** field is the status of the Product Catalog created; Options available are: **Active** or **Inactive**.
- **Availability** field is the availability status of the Product Catalog; Options available are: **Active** or **Inactive**.

2) **Product Catalog Support**

- For user to enter the Product Catalog Support details for Principal and Customer. (Optional)

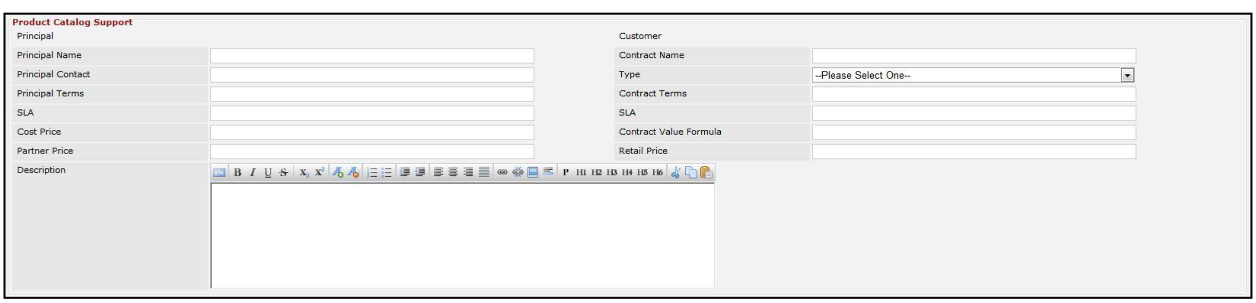


Figure 19.15: Create Product Catalog – Product Catalog Support

To cancel creating New Product Catalog, click Cancel button and navigates back to the **Product Catalog Listing** page.

Edit Product Catalog

To edit the details of the Product Catalog, click at the **Edit** button or click the Edit button in **Product Catalog Management Detail** page. After clicking the **Edit** button or Edit button, page will navigate to the **Product Catalog Management Edit** page. Edit the relevant details and click Save button to save the changes and navigates back to **Product Catalog Management Detail** page or click Save and Next button to save the changes and navigates to the **Product Catalog Management Edit page** for the next record. There are **two** main sections of Product Catalog to be edited **Product Catalog Details** and **Product Catalog Support.**

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Product Catalog Details**

- Compulsory fields: **Case**, **Type**, **Subject**, **Status** and **Priority**.

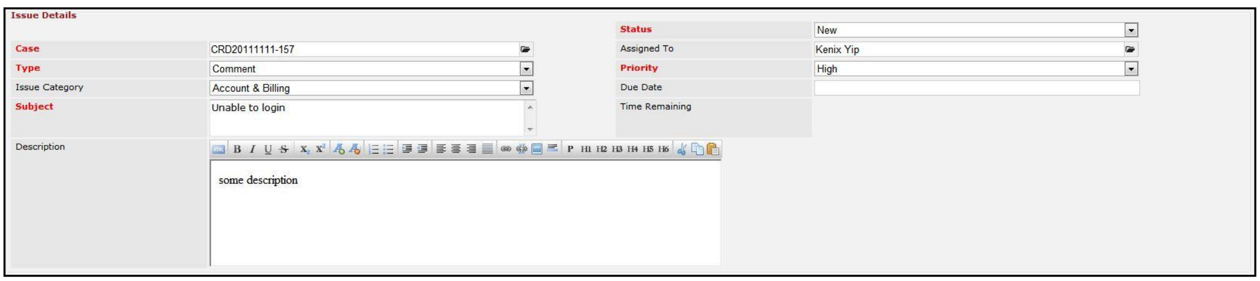


Figure 19.16: Edit Product Catalog - Product Catalog Details

- **Product Name** field will be the Product Name for identification.
- **Status** field is the status of the Product Catalog created; Options available are: **Active** or **Inactive**.
- **Availability** field is the availability status of the Product Catalog; Options available are: **Active** or **Inactive**.

2) **Root Cause Details**

- For user to enter the Product Catalog Support details for Principal and Customer. (Optional)

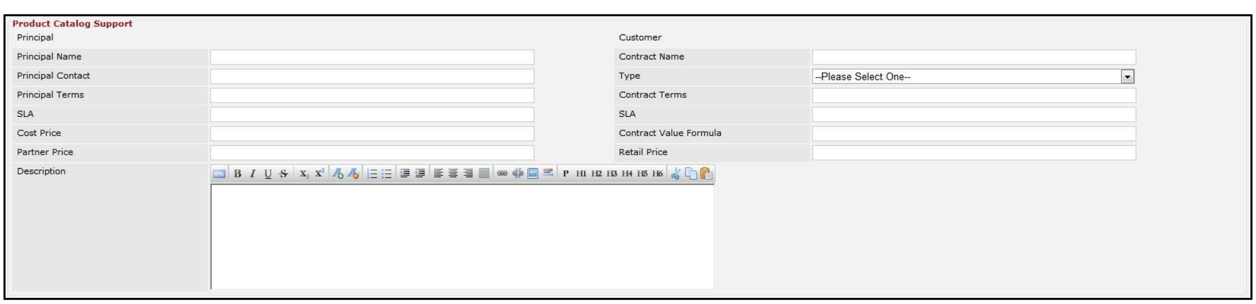


Figure 19.17: Create Product Catalog – Product Catalog Support

To cancel editing Product Catalog, click Cancel button and navigates back to the **Product Catalog Management Detail** page.

Product Catalog – Activities Subpanel

This subpanel contains any activities related to the contact. **Call**, **Meeting** or **Task** created will be displayed in this **Activities** subpanel.

Product Catalog – Activities Subpanel (New Call)

To create a New Call related to a Product Catalog, click at the New Call menu at **Activities** subpanel. Once New Call menu is clicked, a Call Management window will pop up for user to create a New Call. Enter the details of the Call and click Save button to create the New Call.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

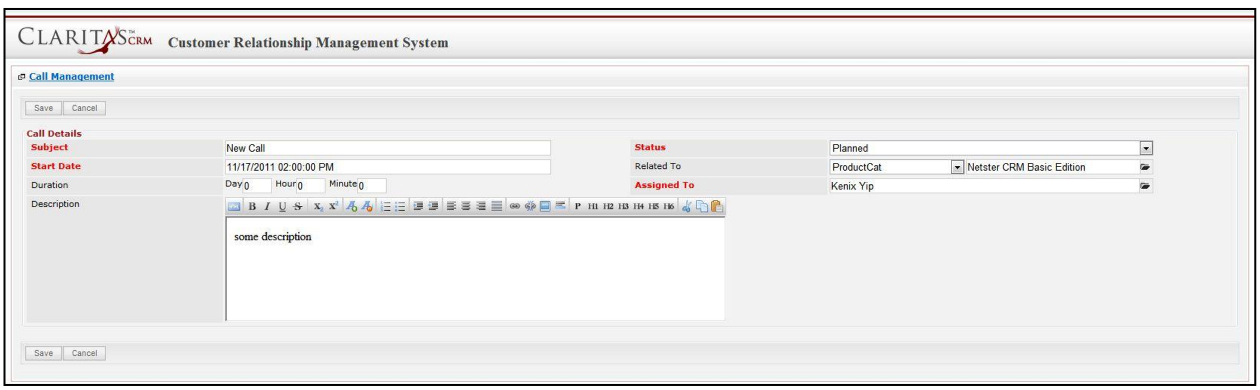


Figure 19.18: New Call Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Subject** field will be the Call Name for identification.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Call. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Call is created. Click at the Done menu to set the date and time.

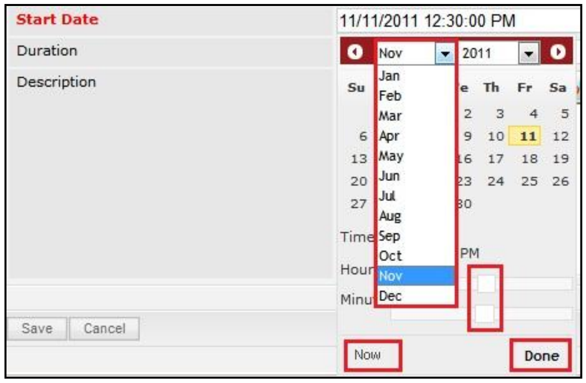


Figure 19.19: Start Date Time

- **Related To** field will auto populate the name of the related **Product Catalog**.
- **Status** field is the status of the Call created; Options available are: **Planned**, **Held** or **Not Held**.
- **Assigned To** field is to assign a User to in charge of the Call for the related Product Catalog. There are two ways of entering the Assigned To field:

  i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)

  OR

Figure 19.20: Assigned To Field Auto Complete Dropdown

  ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

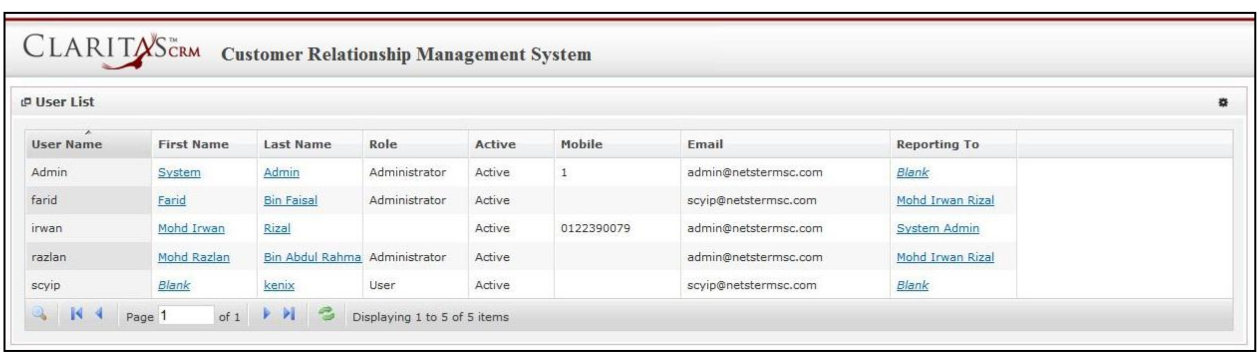


Figure 19.21: Assigned To Popup

- After a New Call is created, the subpanel will auto-refresh and display the newly-created Call.

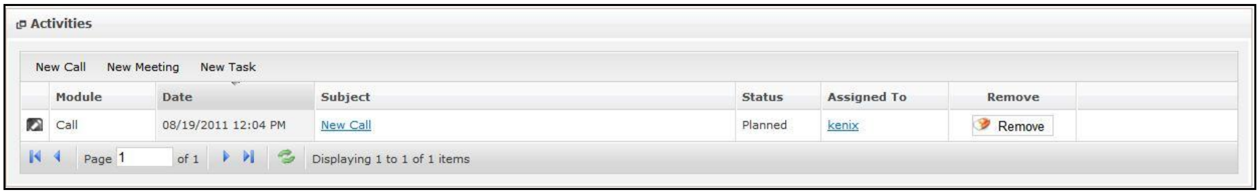


Figure 19.22: Activities Subpanel List New Call

To **cancel creating New Call**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Call and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Call.

Product Catalog – Activities Subpanel (New Meeting)

To create a New Meeting related to a Product Catalog, click at the New Meeting menu at **Activities** subpanel. Once New Meeting menu is clicked, a Meeting Management window will pop up for user to create a New Meeting. Enter the details of the Meeting and click Save button to create the New Meeting.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

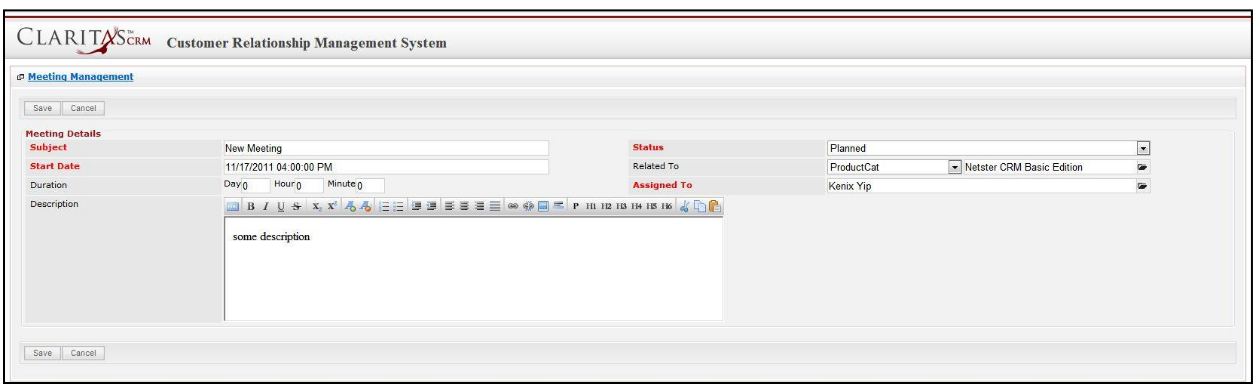


Figure 19.23: New Meeting Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Status**, and **Assigned To**.
- **Subject** field will be the Meeting Name for identification.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Call. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Meeting is created. Click at the Done menu to set the date and time.

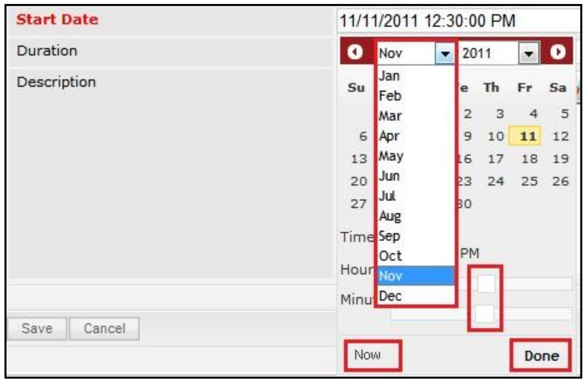


Figure 19.24: Start Date Time

- **Related To** field will auto populate the name of the related **Product Catalog**.
- **Status** field is the status of the Meeting created; Options available are: **Planned**, **Held** or **Not Held**.
- **Assigned To** field is to assign a User to in charge of the Meeting for the related Product Catalog. There are two ways of entering the Assigned To field:
    i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)
    OR

Figure 19.25: Assigned To Field Auto Complete Dropdown

    ii. Click at the button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

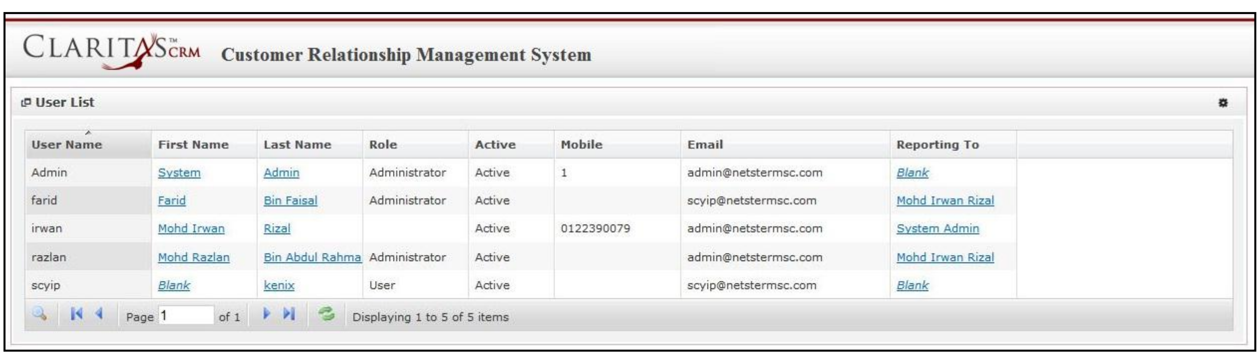


Figure 19.26: Assigned To Popup

- After a New Meeting is created, the subpanel will auto-refresh and display the newly-created Meeting.

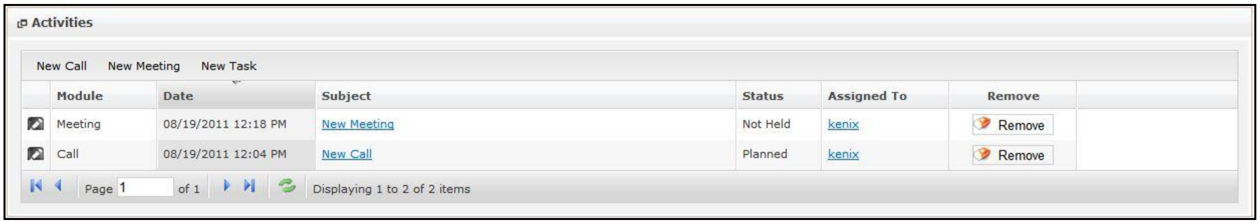


Figure 19.27: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click Cancel button. A confirmation dialog showing "Are you sure you want to close this window?" will prompt user to cancel creating New Meeting and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Meeting.

Product Catalog – Activities Subpanel (New Task)

To create a New Task related to a Product Catalog, click at the New Task menu at **Activities** subpanel. Once New Task menu is clicked, a Task Management window will pop up for user to create a New Task. Enter the details of the Task and click Save button to create the New Task. Or click Cancel menu to cancel creating New Task.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

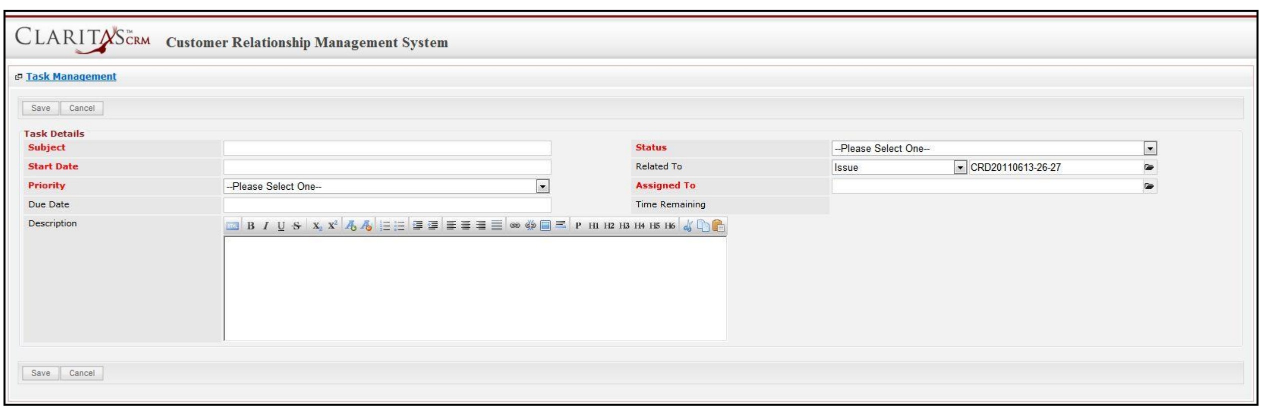


Figure 19.28: New Task Management Popup

- Compulsory fields: **Subject**, **Start Date**, **Priority**, **Status**, and **Assigned To**.
- **Subject** field will be the Task Name for identification.
- **Start Date** field when clicked will populate a calendar for user to select the date and time for the Task. Click at the **Month** and **Year** dropdown to navigate to the selected date and drag the time

bar **horizontally** to set the time. OR click at the Now menu to set the **current time** when the Task is created. Click at the Done menu to set the date and time.

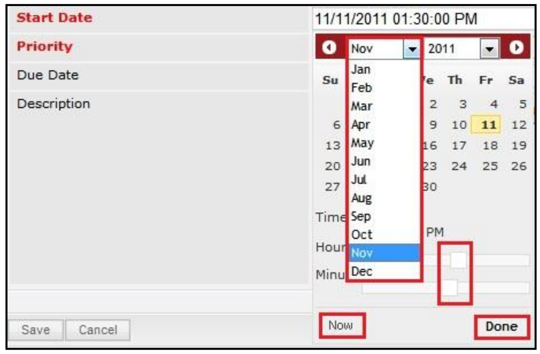


Figure 19.29: Start Date Time

- **Priority** field once selected will auto-populate the **Due Date** field and **Time Remaining** accordingly.
- There are five **Statuses** available for Task- **Not Started**, **In Progress**, **Completed**, **Pending Input**, and **Deferred.**
- **Related To** field will auto populate the name of the related **Product Catalog**.
- **Assigned To** field is to assign a User to in charge of the Task for the related Product Catalog. There are two ways of entering the Assigned To field:
  i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user) **OR**

Figure 19.30: Assigned To Field Auto Complete Dropdown

  ii. Click at the  button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)

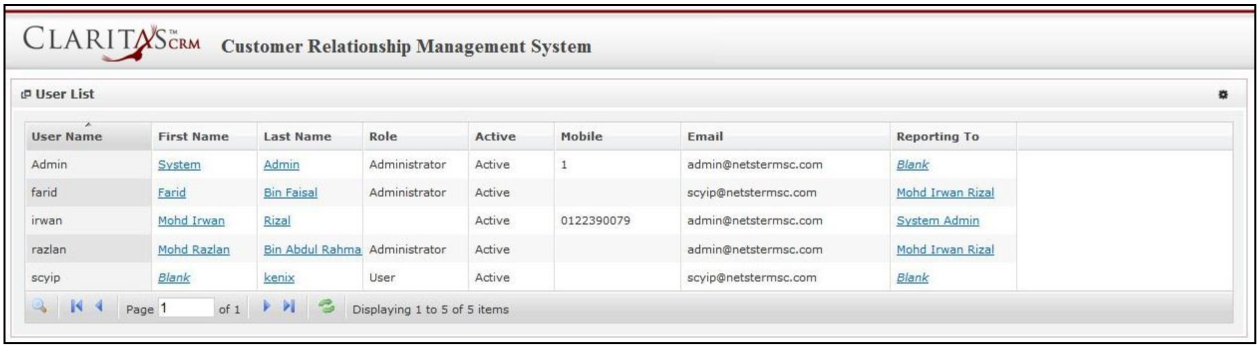


Figure 19.31: Assigned To Popup

- After a New Task is created, the subpanel will auto-refresh and display the newly-created Task.

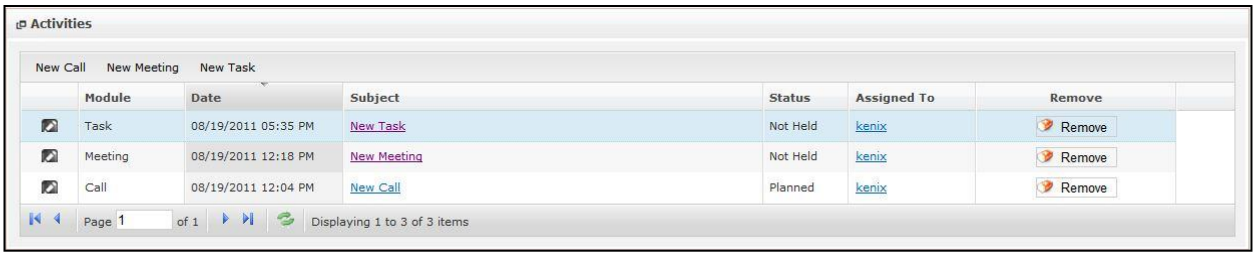


Figure 19.32: Activities Subpanel List New Task

To **cancel creating New Task**, click Cancel button. A confirmation dialog showing “Are you sure you want to close this window?” will prompt user to cancel creating New Task and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Task.

Product Catalog – History Subpanel

This subpanel contains any history or note related to the Product Catalog.

Product Catalog – History Subpanel (New Note)

To create a New Note related to a Product Catalog, click at the New Note menu at **History** subpanel. Once New Note menu is clicked, a Note Management window will pop up for user to create a New Note. Enter the details of the Note and click Save button to create the New Note.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

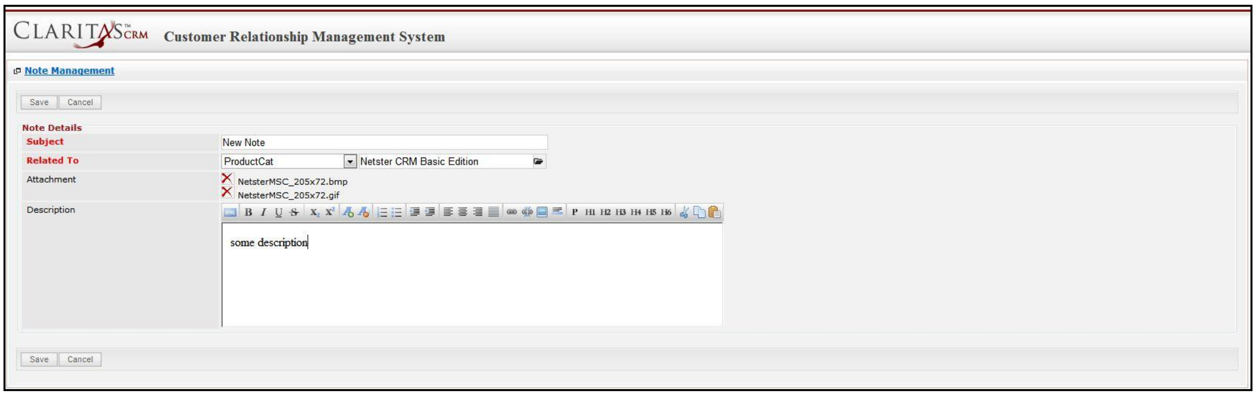


Figure 19.33: New Note Management Popup

- Compulsory fields: **Subject**, and **Related To**.
- **Related To** field will auto populate the name of the related **Product Catalog**.
- **Attachment** field allow file extensions are as below (format that is not stated are not allowed to be uploaded):
  - **Documents:** .doc, .docx, .xls, .xlsx, . rtf, .txt, .pdf, .ppt, .pptx
  - **Pictures:** .jpg, .bmp, .png, .bmp, .gif
  - **Audio:** .mp3, .wma
  - **Video:** .3gp, .mp4, .rmvb, .avi, .flv
  - **Archive:** .zip, .rar
- After a New Task is created, the subpanel will auto-refresh and display the newly-created Note.

Figure 19.34: History Subpanel List New Task

To **cancel creating New Note**, click Cancel button. A confirmation dialog showing “Are you sure you want to close this window?” will prompt user to cancel creating New Note and close the window. Click OK button to **confirm**.

Clicking Cancel button will **cancel** closing the window and user can proceed with creating the New Note.

20 Admin – Holiday Setting

This module is to **create and store Holiday Setting details**.

Holiday Setting Listing

To view Holiday Setting Listing, click at the **Admin** menu at the Main Menu bar.

Figure 20.1: Admin Menu in Main Menu

Page will navigate to Admin Management Page. Click at the Holiday Setting Menu in Admin Management Page.

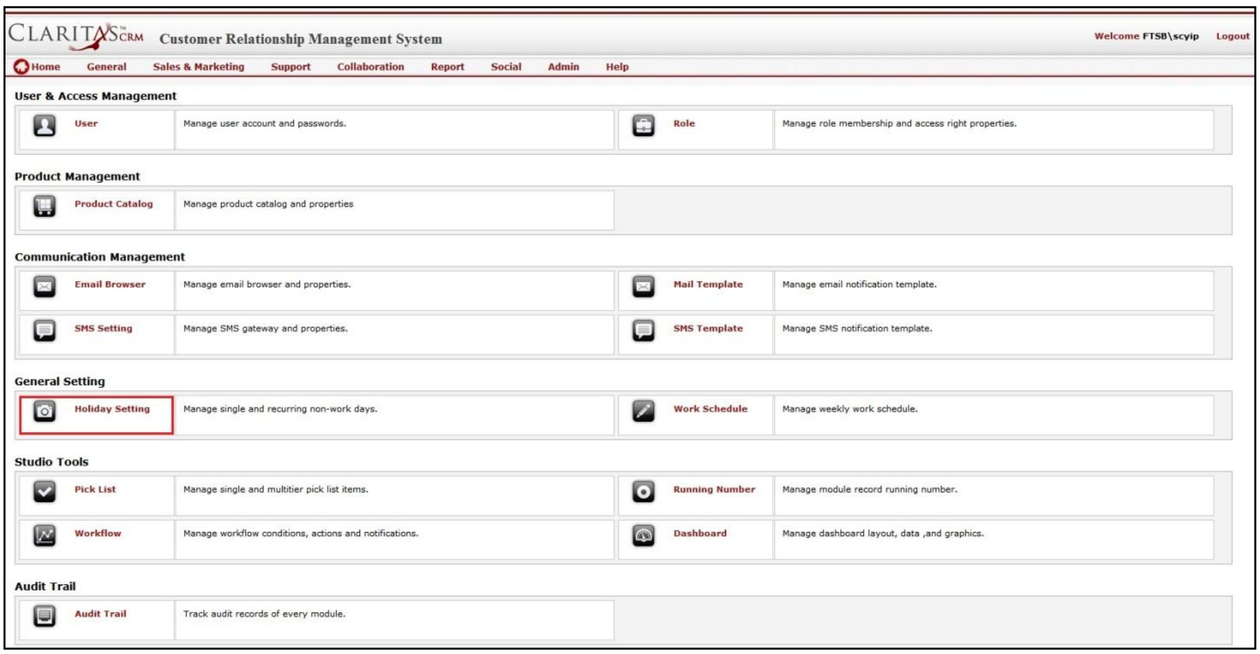


Figure 20.2: Holiday Setting Menu in Admin Management Page

Page will load the list of the Holiday Setting available and Add Holiday Detail form in the system.

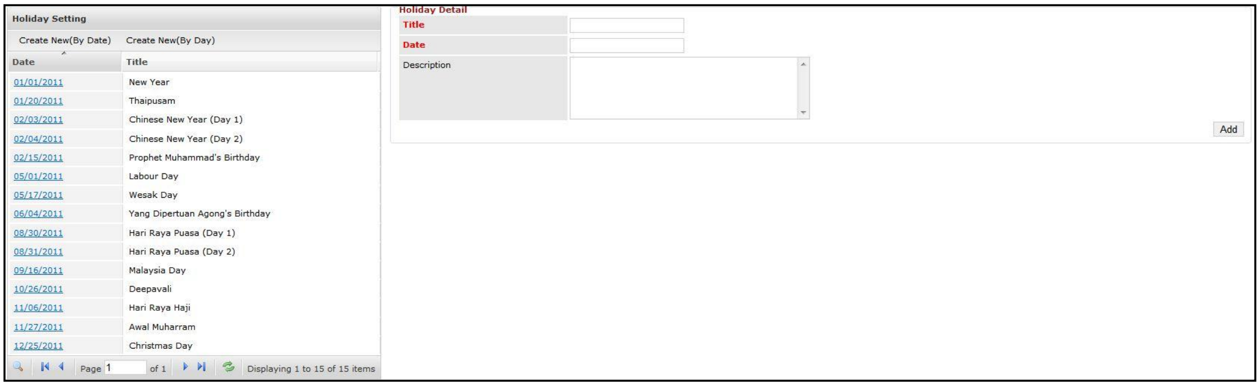


Figure 20.3: Holiday Setting Listing and Add Holiday Detail Form

To view the Holiday Setting Details, click at the Date hyperlink in Subject column. The Holiday Setting Details will be displayed at the Holiday Detail section next to the listing.

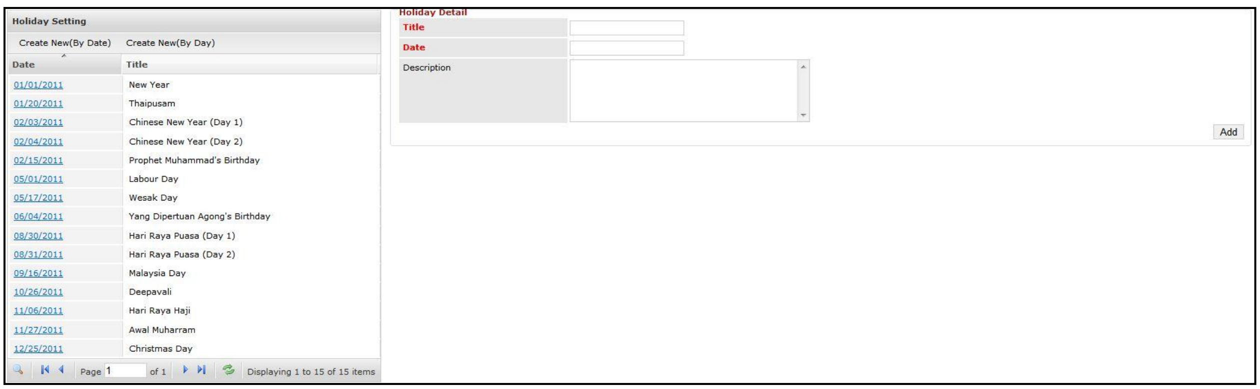


Figure 20.4: Date Hyperlink

To create a new Holiday Setting, click at the Create New(By Date) button to create the holiday by date or Create New(By Day) button to create the holiday by day at the top of the Holiday Setting Listing.

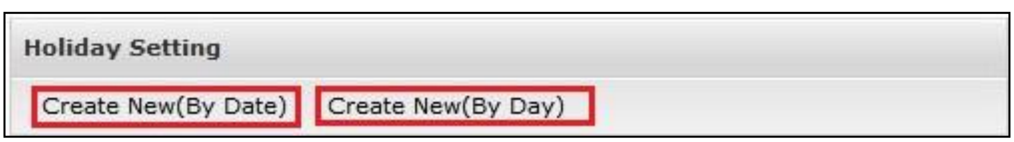


Figure 20.5: Create New Holiday Setting Menu

After clicking Create New(By Date) button or Create New(By Day) button, **Holiday Detail** form will be emptied for user to enter data. Enter the relevant details and click Add button to save the details and display in **Holiday Setting Listing.** A message showing "Save successful" will pop up to show that Holiday Detail is added successfully. Click OK button to close the dialog.

***Related Topics**: See "Create New Holiday Setting"*

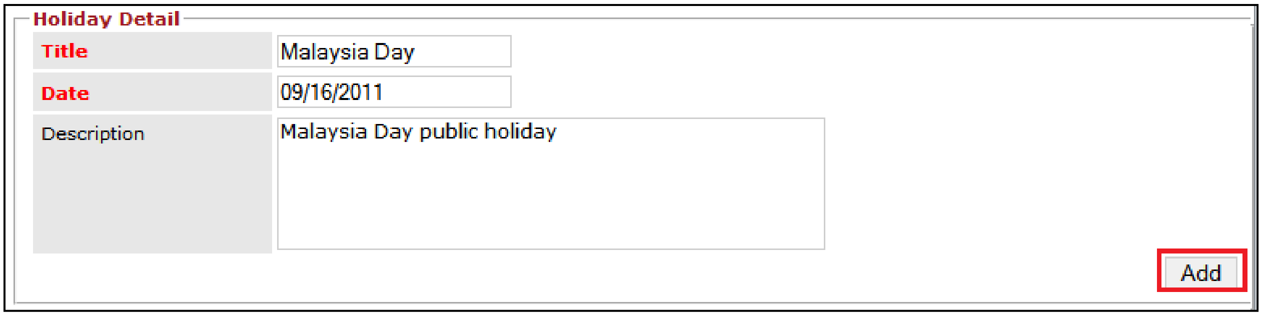


Figure 20.6: Add Holiday Detail Form

Figure 20.7: Holiday Detail Save Successful Dialog

To **delete** a Holiday Setting, click at the Date hyperlink of the selected record and click Delete button.

Figure 20.8: Delete Holiday Setting

Message showing "**Record is deleted**" will be displayed to show that the deletion is successful.

Figure 20.9: Message Showing Holiday Setting Deleted Successfully

Deleted Holiday Setting will **no longer** be displayed in Holiday Setting Listing.

*** MAKE SURE** that the correct record is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

To go to the First Page of the listing, click at the **First Page** button.

To go to the Previous Page of the listing, click at the **Previous Page** button.

To go to the Next Page of the listing, click at the **Next Page** button.

To go to the Last Page of the listing, click at the **Last Page** button.

To refresh the listing page, click at the **Refresh** button.

To search for record/s, click at the **Search** button. An **Advance Search** section will expand at the bottom of the listing for user to select the search field and enter search value.

Figure 20.10: Holiday Setting Advance Search

To edit the details of the Holiday Setting, click at the Date hyperlink of the selected record then edit the details and click Update button.

Figure 20.11: Holiday Detail Update

***Related Topics**: See "[Edit Holiday Setting]"*

Create New Holiday Setting (By Date)

To create new Holiday Setting, click at the **Admin** menu at the Main Menu bar. Page will navigate to Admin Management Page. Click at the Holiday Setting Menu in Admin Management Page. Then click the Create New(By Date) button at the top of the **Holiday Setting Listing**. After clicking Create New(By Date) button, **Holiday Detail** form will be emptied for user to enter data. Enter the relevant details and click Add button to save the details and display in **Holiday Setting Listing.** A message showing "Save successful" will pop up to show that Holiday Detail is added successfully. Click OK button to close the dialog.

There is only **one** main section to be filled in to create a new Holiday Setting: **Holiday Details**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Holiday Details**

   - Compulsory fields: **Title** and **Date.**

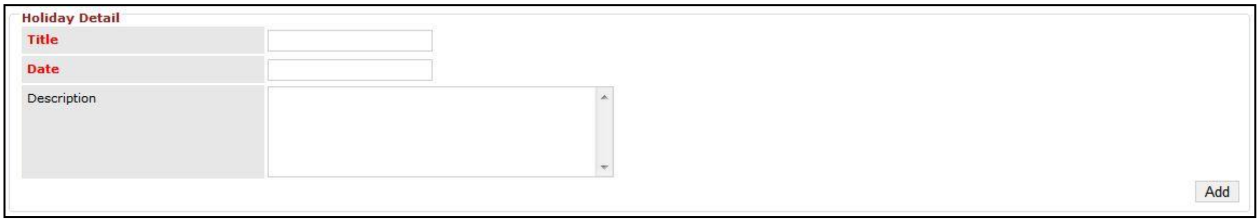


Figure 20.12: Create Holiday by Date - Holiday Detail

   - **Title** field is for user to enter the title of the holiday i.e Hari Raya Holiday.
   - **Date** field when clicked will populate a calendar for user to select the date and time for the Holiday Setting. Click at the **Month** and **Year** dropdown to navigate to the selected date. Click at the date to select.

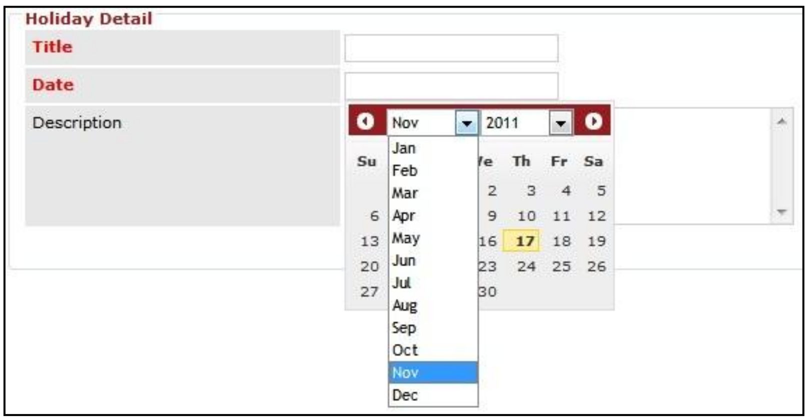


Figure 20.13: Holiday Date Field

   - **Description** field is for user to enter the description for the holiday i.e. First Day of Hari Raya.

Create New Holiday Setting (By Day)

To create new Holiday Setting, click at the **Admin** menu at the Main Menu bar. Page will navigate to Admin Management Page. Click at the Holiday Setting Menu in Admin Management Page. Then click the Create New(By Day) button at the top of the **Holiday Setting Listing**. After clicking Create New(By Day) button, **Holiday Detail** form will be emptied for user to enter data. Enter the relevant details and click Add button to save the details and display in **Holiday Setting Listing.** A message showing "**Save successful**" will pop up to show that Holiday Detail is added successfully. Click OK button to close the dialog. Creating New Holiday by Day will add **12 records** altogether for that **specific day and week** for **every month of the year**.

There is only **one** main section to be filled in to create a new Holiday Setting: **Holiday Details**.

Note: Fields highlighted in ***RED*** *are required/compulsory fields and must be filled in.*

1) **Holiday Details**

- Compulsory fields: **Title**, **Year**, **Day**, and **Nth Week**.

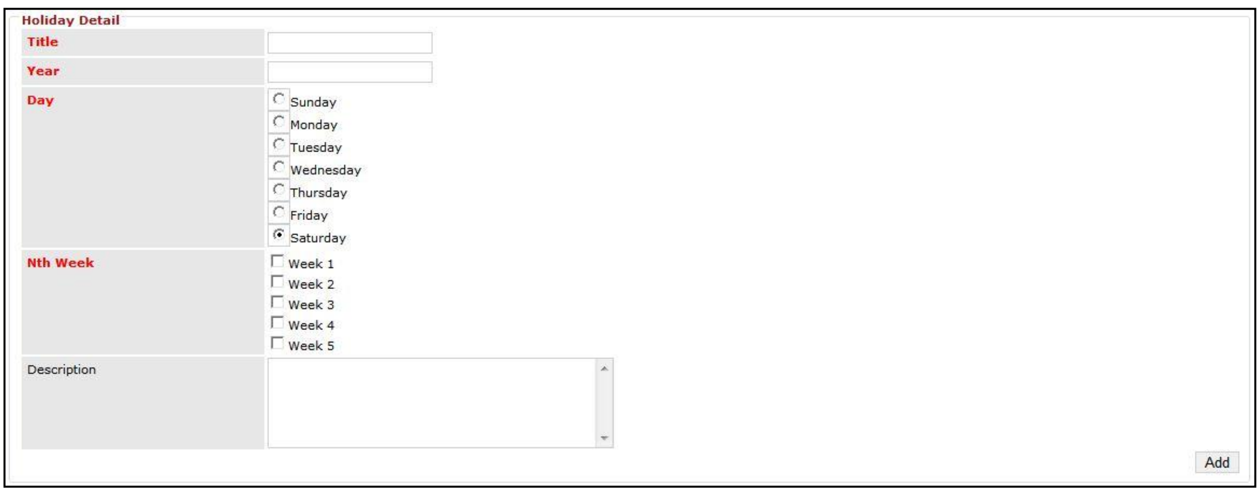


Figure 20.14: Create Holiday by Day – Holiday Detail

- **Title** field is for user to enter the title of the holiday i.e First Saturday of Month.
- **Year** field is for user to enter the year of the holiday.
- **Day** field is for user to select which day will be the holiday; Options available are: **Sunday**, **Monday**, **Tuesday**, **Wednesday**, **Thursday**, **Friday** and **Saturday**.
- **Nth Week** is for user to select which week will be the holiday. Options available are: **Week 1**, **Week 2**, **Week 3**, **Week 4** and **Week 5**.
- **Description** field is for user to enter the description for the holiday i.e. First Saturday is Public Holiday.

Altogether 12 records are added to the listing for that specific day and week for every month of the year.

Holiday Setting

Create New(By Date) Create New(By Day)

Date	Title
01/02/2012	First Saturday
02/06/2012	First Saturday
03/05/2012	First Saturday
04/02/2012	First Saturday
05/07/2012	First Saturday
06/04/2012	First Saturday
07/02/2012	First Saturday
08/06/2012	First Saturday
09/03/2012	First Saturday
10/01/2012	First Saturday
11/05/2012	First Saturday
12/03/2012	First Saturday

Page 2 of 2 Displaying 16 to 27 of 27 items

Figure 20.15: Holiday Created by Day

Edit Holiday Setting

To edit Holiday Setting, click at the **Admin** menu at the Main Menu bar. Page will navigate to Admin Management Page. Click at the Holiday Setting Menu in Admin Management Page. To edit the details of the Holiday Setting, click at the Date hyperlink of the selected record then edit the details and click Update button.

There is only **one** main section of Holiday Settings to be edited: **Holiday Details**.

*Note: Fields highlighted in **RED** are required/compulsory fields and must be filled in.*

1) **Holiday Setting Details**

   - Compulsory fields: **Title** and **Date.**
   - **Title** field is for user to enter the title of the holiday i.e Hari Raya Holiday.
   - **Date** field when clicked will populate a calendar for user to select the date and time for the Holiday Setting. Click at the **Month** and **Year** dropdown to navigate to the selected date. Click at the date to select.

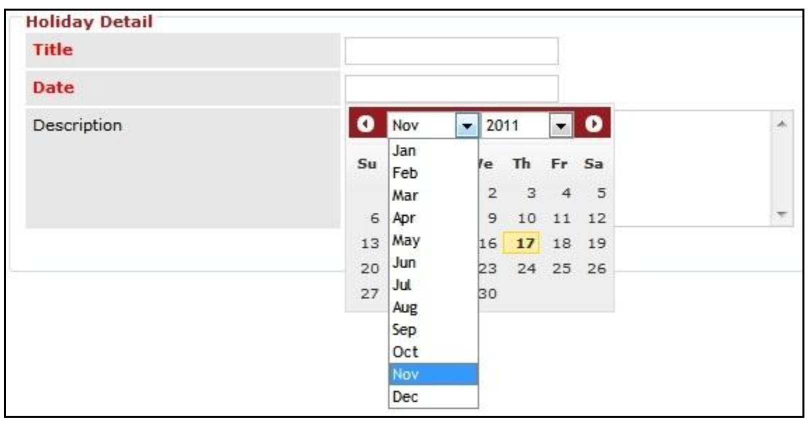


Figure 20.16: Holiday Date Field

   - **Description** field is for user to enter the description for the holiday i.e. First Day of Hari Raya.

21 Admin – Work Schedule

This module is to **set the work schedule**.

Work Schedule

To view the Work Schedule, click at the **Admin** menu at the Main Menu bar.

Figure 21.1: Admin Menu in Main Menu

Page will navigate to Admin Management Page. Click at the Work Schedule Menu in Admin Management Page.

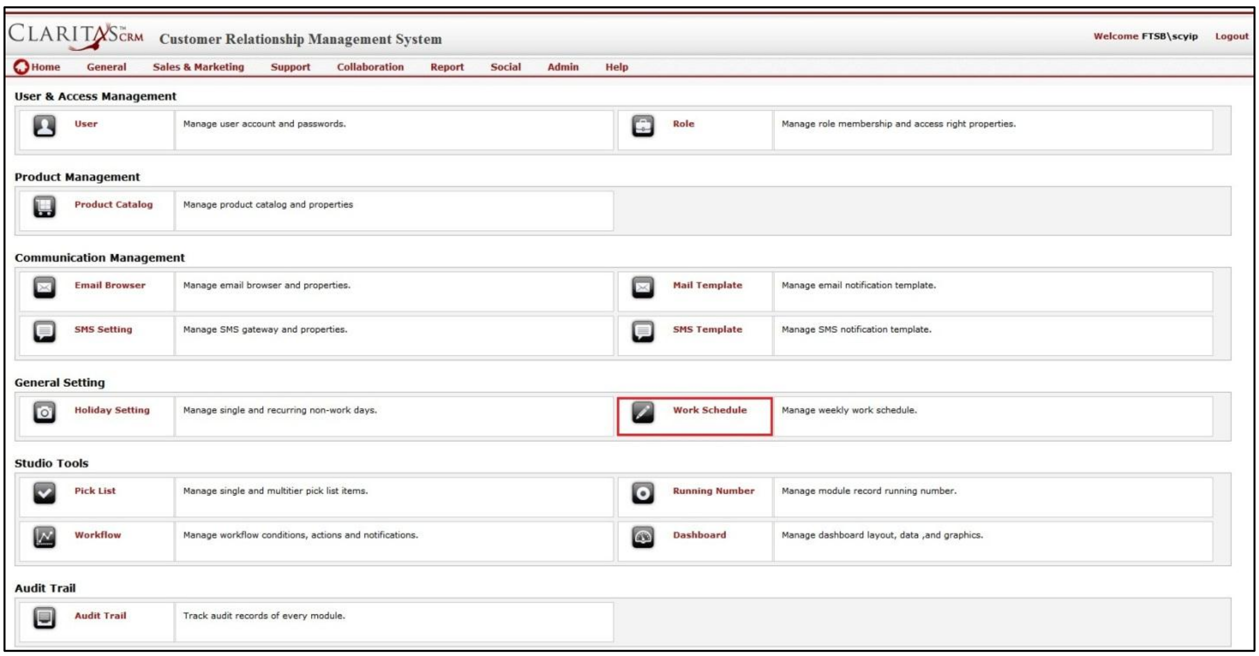


Figure 21.2: Work Schedule Menu in Admin Management Page

Page will load the Work Schedule as set in the system.

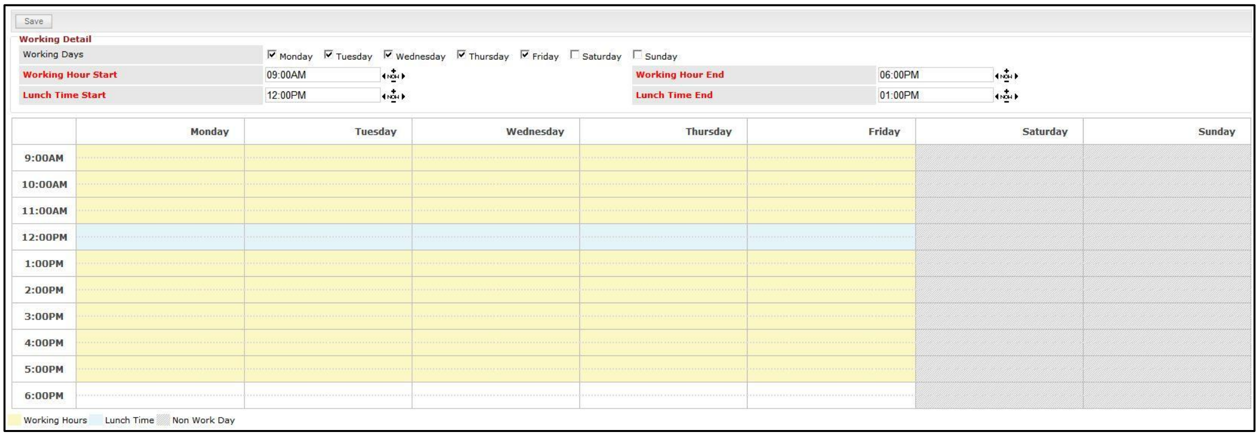


Figure 21.3: Work Schedule

Compulsory fields: **Working Hour Start**, **Working Hour End**, **Lunch Time Start**, and **Lunch Time End**.

Select the Working days by checking the Working Days checkboxes.

Enter/ Select the Working Hour Start, Working Hour End, Lunch Time Start, and Lunch Time End fields.

Note that the Work Schedule below the Working Detail section will change with the details entered in Working Details section.

Click Save button to save the changes.

22 Admin – Pick List

This module is to **manage pick list in the system**.

Pick List Listing

To go to Pick List module, click at the **Admin** menu at the Main Menu bar.

Figure 22.1: Admin Menu in Main Menu

Page will navigate to Admin Management Page. Click at the Pick List Menu in Admin Management Page.

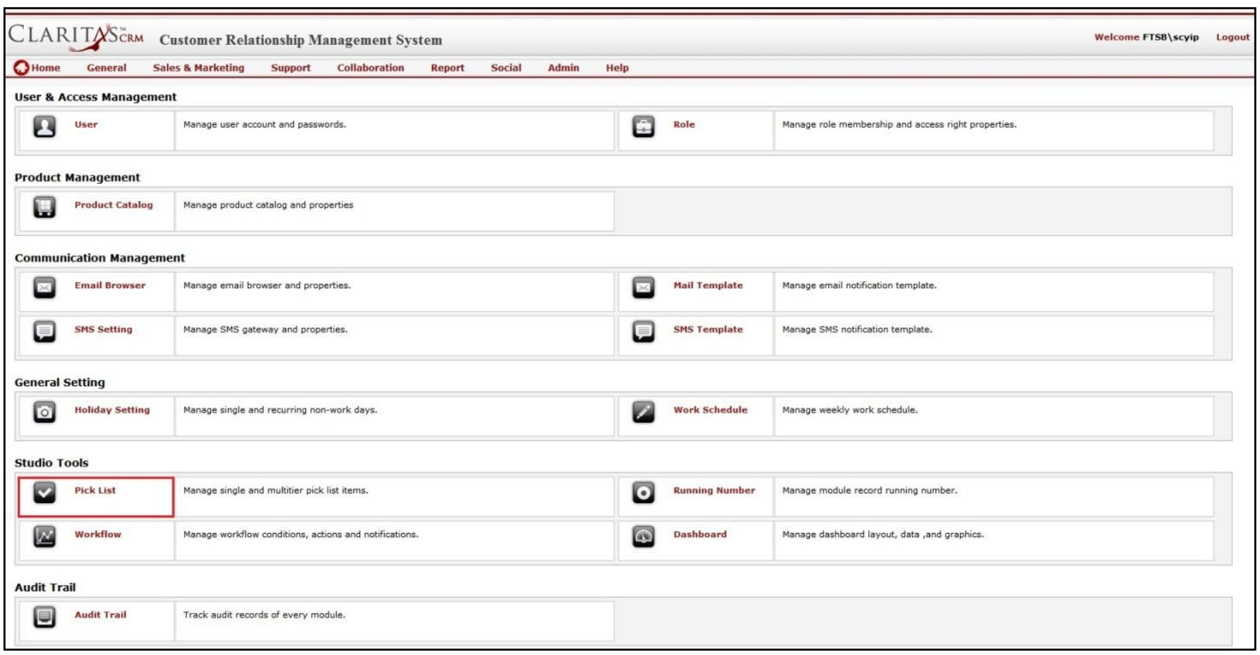


Figure 22.2: Pick List Menu in Admin Management Page

Page will load the Pick Listing and Pick List Detail Page.

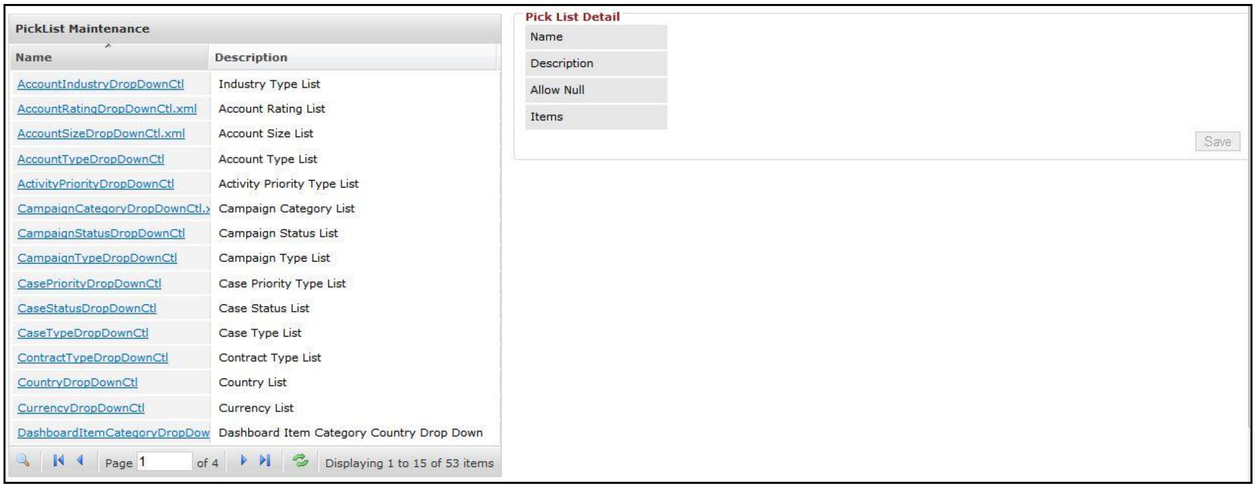


Figure 22.3: Pick List Page

Click at the Pick List Name hyperlink to view the detail of the Pick List in Pick List Detail section.

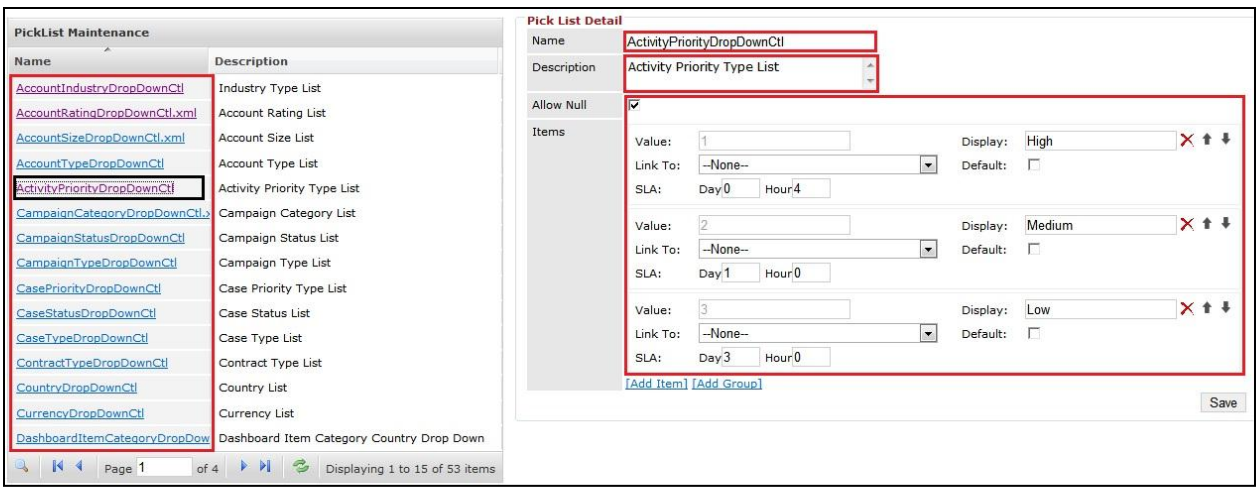


Figure 22.4: Pick List Detail

Name field is for user to define the name for the pick list for identification.

Description field is for user to enter some description for the pick list.

Allow Null and **Default** checkboxes determine the default value for the pick list.

The table below shows checking and unchecking of **Allow Null** and **Default** checkboxes and what value to be set as default and is displayed as initial value:

Case	Allow Null	Default	Default Value for Pick List
1	☐	☑	**Checked value** as default
2	☑	☐	**--Please select one--** as default
3	☑	☑	**Checked value** as default
4	☐	☐	**First value** of pick list as default

Below is the description of the above table:

1) Case 1:

  - **Allow Null** checkbox is **unchecked** and **Default** checkbox is checked , in this case, value "Closed" is checked , then the default value for the CaseStatusDropDownCtl will be "Closed".

2) Case 2:

  - **Allow Null** checkbox is **checked** and **Default** checkbox is **unchecked** , then the default value for the CaseStatusDropDownCtl will be "--Please select one--".

3) Case 3:

  - **Allow Null** checkbox is **checked** and **Default** checkbox is **checked** , in this case, value "Closed" is checked , then the default value for the CaseStatusDropDownCtl will be "Closed".

4) Case 4:

  - **Allow Null** checkbox is **unchecked** and **Default** checkbox is also unchecked , then the default value for the CaseStatusDropDownCtl will be "Closed".

User is able to **Add Item/Group** and **Delete Item/Group** from the selected pick list.

To **Add Group** to the selected pick list, click at the Pick List Name hyperlink to view the details of the Pick List in Pick List Detail section. Then click at the Add Group hyperlink. A new panel will appear for user to enter the **Group Name**. Click Save button to save the changes.

Figure 22.5: Add Group to PickList

User can also move the **Group** up or down by clicking at the **Move Up** icon or **Move Down** icon.

To delete the added **Group**, click at the **Delete** icon.

To **Add Item** to the selected pick list, click at the Pick List Name hyperlink to view the detail of the Pick List in Pick List Detail section. Then click at the Add Item hyperlink. A new panel will appear for user to enter the **Value**, **Display**, **Link To** and **Default**. Click Save button to save the changes.

  - **Value** field will be the Value stored in database. This value must be unique and cannot be edited once Save button is clicked. It is advisable to enter a meaningful and without space Value for the field.

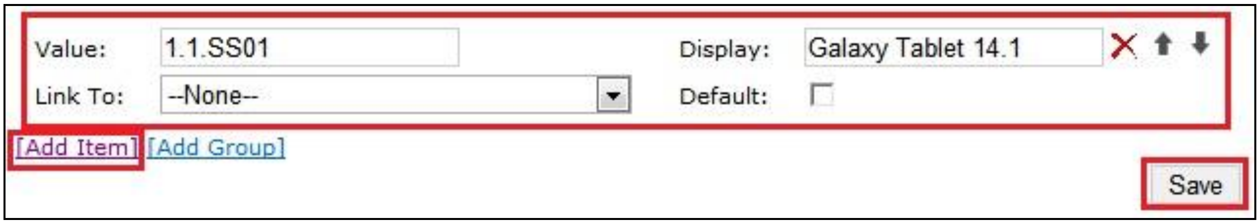


Figure 22.6: Add Item to PickList

To **edit item** in pick list, click at the Pick List Name hyperlink to view the detail of the Pick List in Pick List Detail section. Then edit the **Display**, **Link To** or **Default** field and click Save button to save the changes. **Value** field is **not editable**.

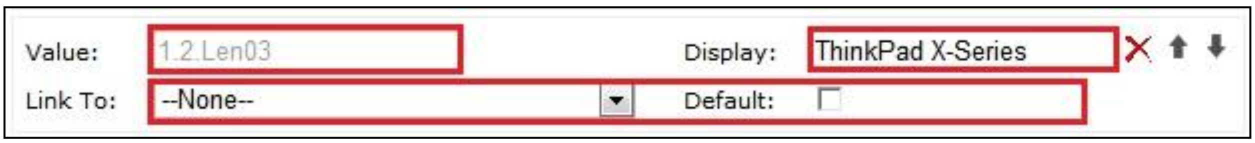


Figure 22.7: Add Item to PickList

User can also move the **Item** up or down by clicking at the **Move Up** icon or **Move Down** icon.

To **delete item** in pick list, click at the Pick List Name hyperlink to view the detail of the Pick List in Pick List Detail section. Then click at the button to **delete** the selected item.

*** MAKE SURE** that the correct item is being deleted as all the deleted data will be erased from the database and **CANNOT** be recovered!

23 Admin – Running Number

This module is to **manage running number in the system**.

Running Number Listing

To go to Running Number module, click at the **Admin** menu at the Main Menu bar.

Figure 23.1: Admin Menu in Main Menu

Page will navigate to Admin Management Page. Click at the Running Number Menu in Admin Management Page.

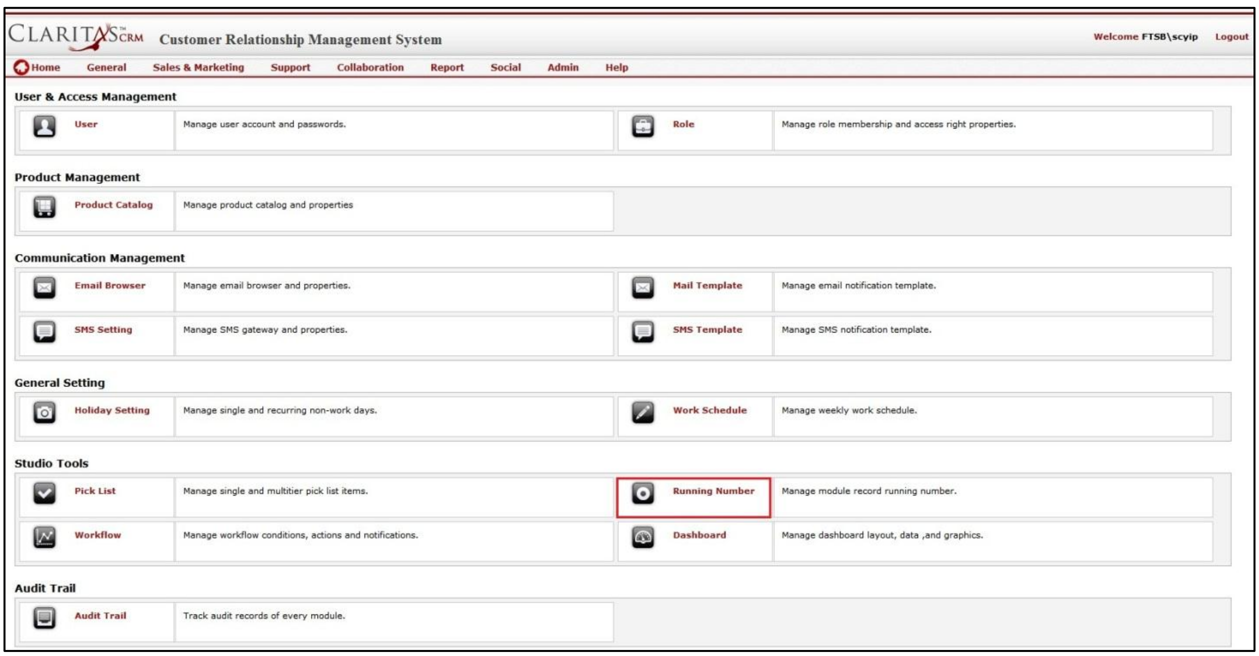


Figure 23.2: Running Number Menu in Admin Management Page

Page will load the Running Number and Running Number Detail Page.

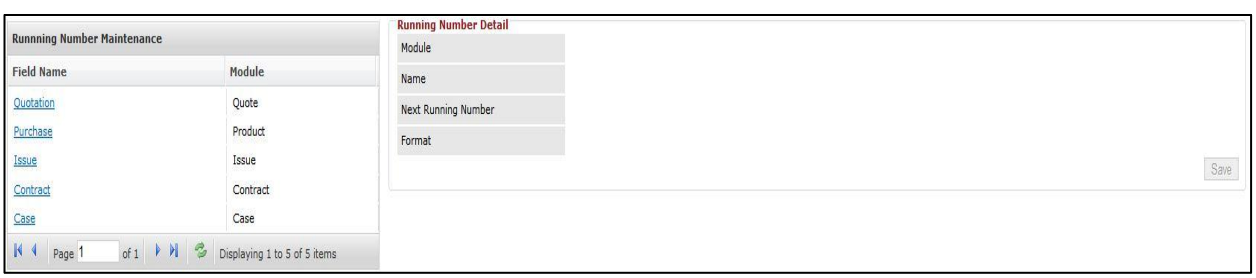


Figure 23.3: Running Number Page

Click at the Field Name hyperlink to view the detail of the Running Number in Running Number Detail section.

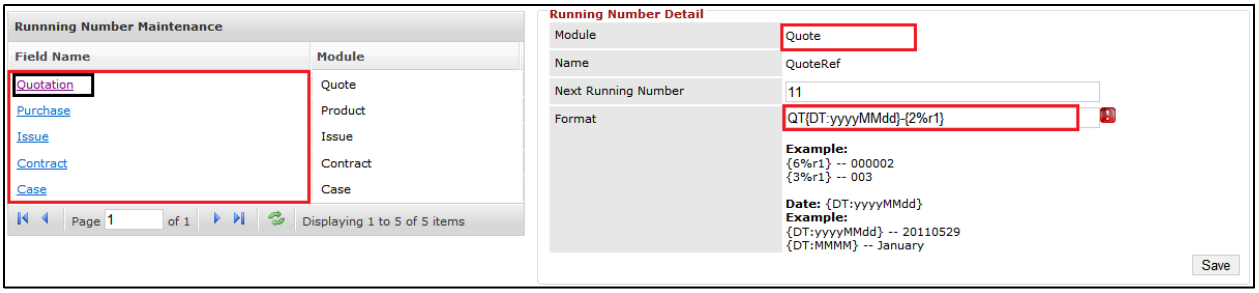


Figure 23.4: Running Number Detail

Module field is the name of the module for the running number.

Name field is the Name of the field that uses the running number.

Next Running Number and **Format** fields define the format and how the running number will go. Below is some description on how to write the running number:

Format:

{6%r1} -- 000002

{3%r1} – 003

Date: {DT:yyyyMMdd}

{DT:yyyyMMdd} – 20110529

{DT:MMMM} – January

Example:

Next Running Number: **100**

Format**: {DT:yyyyMMdd}-{6%r1}**

Then the running number will be **20110822-000100**.

Mouse over the Information icon to see the Date Format and examples as below:

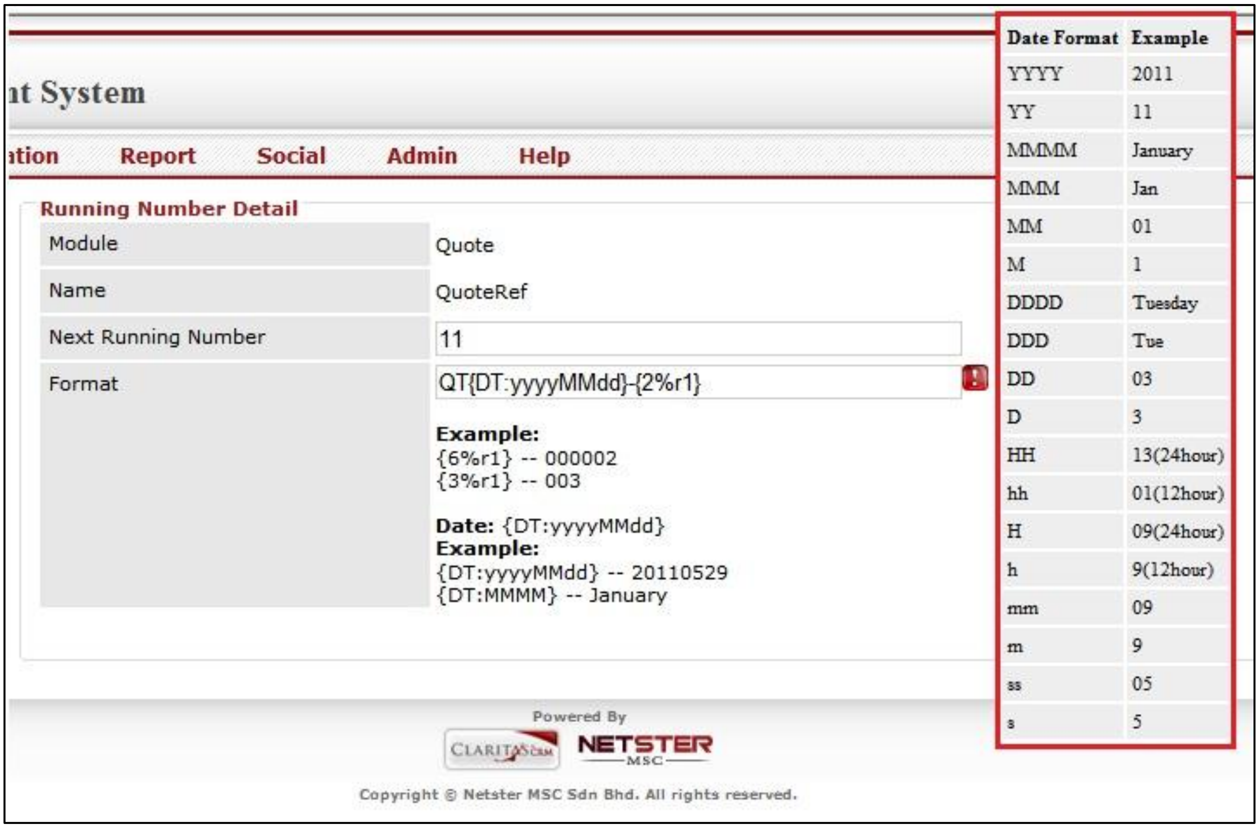


Figure 23.5: Date Format and Examples

24 Admin – Audit Trail

This module is to let user to **track the audit records of every module.**

To go to Audit Trail module, click at the **Admin** menu at the Main Menu bar.

Figure 24.1: Admin Menu in Main Menu

Page will navigate to Admin Management Page. Click at the Audit Trail Menu in Admin Management Page.

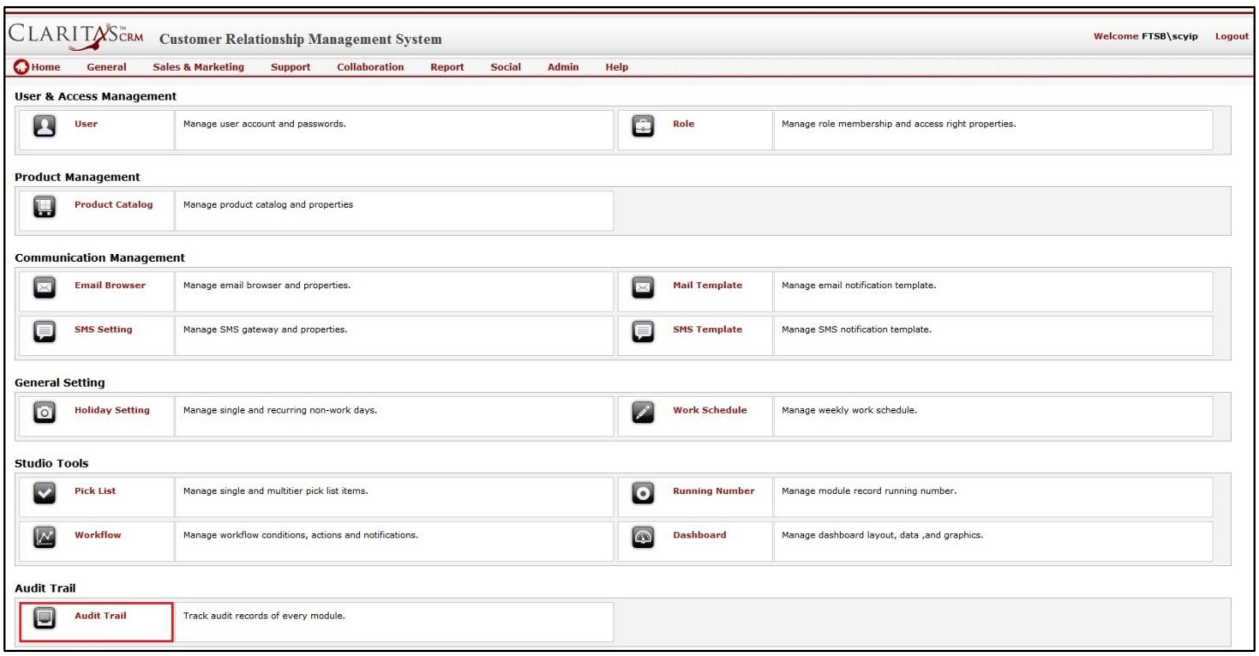
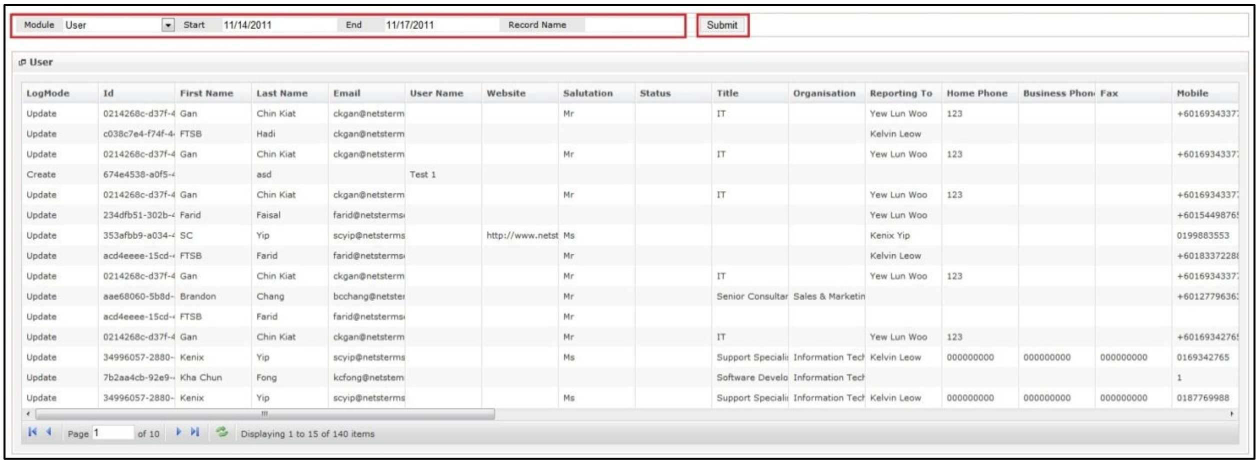


Figure 24.2: Audit Trail Menu in Admin Management Page

Page will load the Audit Trail Page with **Module**, **Start**, **End**, and **Record Name** field for selection.

Figure 24.3: Running Number Page

To view the audit records of each module, select the **Module**, **Start**, **End**, or **Record Name** field and click Submit button.



Module User Start 11/14/2011 End 11/17/2011 Record Name Submit

User

LogMode	Id	First Name	Last Name	Email	User Name	Website	Salutation	Status	Title	Organisation	Reporting To	Home Phone	Business Phon	Fax	Mobile
Update	0214268c-d37f-4	Gan	Chin Kiat	ckgan@netsterm			Mr		IT		Yew Lun Woo	123			+6016934337
Update	c038c7e4-f74f-4	FTSB	Hadi	ckgan@netsterm							Kelvin Leow				
Update	0214268c-d37f-4	Gan	Chin Kiat	ckgan@netsterm			Mr		IT		Yew Lun Woo	123			+6016934337
Create	674e4538-a0f5-		asd		Test 1										
Update	0214268c-d37f-4	Gan	Chin Kiat	ckgan@netsterm			Mr		IT		Yew Lun Woo	123			+6016934337
Update	234dfb51-302b-	Farid	Faisal	farid@netsterms							Yew Lun Woo				+6015449876
Update	353afbb9-a034-	SC	Yip	scyip@netsterms		http://www.netst	Ms				Kenix Yip				0199883553
Update	acd4eeee-15cd-	FTSB	Farid	farid@netsterms			Mr				Kelvin Leow				+6018337228
Update	0214268c-d37f-4	Gan	Chin Kiat	ckgan@netsterm			Mr		IT		Yew Lun Woo	123			+6016934337
Update	aae68060-5b8d-	Brandon	Chang	bcchang@netster			Mr		Senior Consultar	Sales & Marketin					+6012779636
Update	acd4eeee-15cd-	FTSB	Farid	farid@netsterms			Mr								
Update	0214268c-d37f-4	Gan	Chin Kiat	ckgan@netsterm			Mr		IT		Yew Lun Woo	123			+6016934276
Update	34996057-2880-	Kenix	Yip	scyip@netsterms			Ms		Support Speciali	Information Tech	Kelvin Leow	000000000	000000000	000000000	0169342765
Update	7b2aa4cb-92e9-	Kha Chun	Fong	kcfong@netstem					Software Develo	Information Tech					1
Update	34996057-2880-	Kenix	Yip	scyip@netsterms			Ms		Support Speciali	Information Tech	Kelvin Leow	000000000	000000000	000000000	0187769988

Page 1 of 10 Displaying 1 to 15 of 140 items

Figure 24.4: Audit Trail Log

To go to the First Page of the listing, click at the **First Page** button.

To go to the Previous Page of the listing, click at the **Previous Page** button.

To go to the Next Page of the listing, click at the **Next Page** button.

To go to the Last Page of the listing, click at the **Last Page** button.

To refresh the listing page, click at the **Refresh** button.