



CLARITAS<sup>TM</sup> CRM

# USER GUIDE

*Claritas Customer Relationship Management*



---

---

## Table of Contents

1	Introduction.....	1
	Getting Started.....	1
	Forgot Password .....	2
2	General – Account .....	4
	Account Listing .....	4
	Create New Account.....	9
	Edit Account.....	10
	Account – Activities Subpanel.....	11
	Account – Activities Subpanel (New Call) .....	11
	Account – Activities Subpanel (New Meeting) .....	13
	Account – Activities Subpanel (New Task).....	15
	Account – History Subpanel .....	18
	Account – History Subpanel (New Note) .....	18
	Account – Contacts Subpanel.....	19
	Create New Contact.....	19
	Select Contact.....	21
	Account – Leads Subpanel.....	22
	Create New Lead .....	22
	Select Lead .....	24
	Account – Product Subpanel.....	24
	Create New Products.....	24
	Select Product.....	25
	Account – Quotes Subpanel.....	26
	Create New Quote .....	26
	Select Quote .....	28
	Account – Opportunities Subpanel.....	29
	Create New Opportunity.....	29
	Select Opportunity.....	31
	Account – Contracts Subpanel.....	32
	Create New Contract .....	32
	Select Contract .....	33
	Account – Cases Subpanel .....	35
	Create New Case .....	35

---



---

	Select Issue.....	37
3	General – Contact .....	38
	Contact Listing .....	38
	Create New Contact.....	43
	Edit Contact.....	44
	Contact – Activities Subpanel.....	46
	Contact – Activities Subpanel (New Call) .....	46
	Contact – Activities Subpanel (New Meeting).....	48
	Contact – Activities Subpanel (New Task) .....	50
	Contact – History Subpanel.....	52
	Contact – History Subpanel (New Note).....	53
	Contact – Direct Reports Subpanel.....	54
	Create New Contact.....	54
	Select Contact.....	56
	Contact – Cases Subpanel .....	56
	Create New Case .....	57
	Select Issue.....	59
	Contact – Contracts Subpanel .....	61
	Create New Contract .....	61
	Select Contract .....	62
	Contact – Opportunities Subpanel.....	63
	Create New Opportunity.....	63
	Select Opportunity.....	65
	Contact – Quotes Subpanel .....	66
	Create New Quote .....	66
	Select Quote .....	69
4	Sales & Marketing - Campaign .....	70
	Campaign Listing.....	70
	Create New Campaign .....	76
	Edit Campaign .....	79
	Campaign – Targets Subpanel .....	81
	Campaign – Targets Subpanel (Add Lead).....	81
	Campaign – Targets Subpanel (Add Contact).....	82
	Campaign – Target Subpanel (Add User) .....	83
	Campaign – Target Subpanel (Email).....	84

---



---

	Campaign – Target Subpanel (SMS) .....	85
5	Sales & Marketing - Lead.....	86
	Lead Listing .....	86
	Create New Lead .....	91
	Edit Lead.....	92
	Convert Lead.....	94
	Lead – Activities Subpanel .....	97
	Lead – Activities Subpanel (New Call) .....	97
	Lead – Activities Subpanel (New Meeting) .....	99
	Lead – Activities Subpanel (New Task) .....	101
	Lead – History Subpanel.....	103
	Lead – History Subpanel (New Note).....	103
	Lead – Campaigns Subpanel.....	104
6	Sales & Marketing - Opportunity .....	106
	Opportunity Listing .....	106
	Create New Opportunity.....	110
	Edit Opportunity.....	112
	Convert Opportunity.....	114
	Opportunity – Activities Subpanel.....	116
	Opportunity – Activities Subpanel (New Call) .....	116
	Opportunity – Activities Subpanel (New Meeting).....	118
	Opportunity – Activities Subpanel (New Task) .....	120
	Opportunity – History Subpanel .....	122
	Opportunity – History Subpanel (New Note).....	122
	Opportunity – Quotes Subpanel.....	123
	Create New Quote .....	124
	Select Quote .....	126
	Opportunity – Contracts Subpanel .....	127
	Create New Contract .....	127
	Select Contract .....	128
7	Sales & Marketing – Quotes.....	129
	Quote Listing .....	129
	Create New Quote .....	134
	Edit Quote.....	136
	Quote – Quote Summary Subpanel .....	139

---



---

Quote – Quote Items .....	140
Quote – Activities Subpanel .....	142
Quote – Activities Subpanel (New Call) .....	142
Quote – Activities Subpanel (New Meeting) .....	144
Quote – Activities Subpanel (New Task) .....	146
Quote – History Subpanel .....	148
Quote – History Subpanel (New Note) .....	148
8 Support – Case .....	150
Case Listing .....	150
Create New Case .....	155
Edit Case .....	157
Case – Activities Subpanel .....	159
Case – Activities Subpanel (New Call) .....	159
Case – Activities Subpanel (New Meeting) .....	161
Case – Activities Subpanel (New Task) .....	163
Case – History Subpanel .....	165
Case – History Subpanel (New Note) .....	165
Case – Issues Subpanel .....	166
Create New Issue .....	166
Select Issue .....	167
9 Support – Issue .....	168
Issue Listing .....	168
Create New Issue .....	173
Edit Issue .....	175
Issue – Activities Subpanel .....	177
Issue – Activities Subpanel (New Call) .....	177
Issue – Activities Subpanel (New Meeting) .....	179
Issue – Activities Subpanel (New Task) .....	181
Issue – History Subpanel .....	184
Issue – History Subpanel (New Note) .....	184
Issue – Knowledge Base Subpanel .....	185
10 Knowledge Base .....	186
Knowledge Base Listing .....	186
Create New Knowledge Base .....	191
Edit Knowledge Base .....	192

---



---

Knowledge Base – Activities Subpanel .....	193
Knowledge Base – Activities Subpanel (New Call).....	194
Knowledge Base – Activities Subpanel (New Meeting) .....	195
Knowledge Base – Activities Subpanel (New Task).....	198
Knowledge Base – History Subpanel.....	200
Knowledge Base – History Subpanel (New Note).....	200
11 Collaboration – Meeting .....	202
Meeting Listing.....	202
Create New Meeting .....	206
Edit Meeting .....	208
12 Collaboration – Call.....	211
Call Listing.....	211
Create New Call .....	216
Edit Call.....	217
13 Collaboration – Task.....	220
Task Listing .....	220
Create New Task.....	224
Edit Task.....	226
14 Collaboration – Note .....	229
Note Listing .....	229
Create New Note.....	233
Edit Note .....	234
15 Collaboration – Email.....	236
Email Listing.....	236
16 Report.....	241
Case Reports .....	241
Case Summary Report.....	241
Case Trend.....	245
Case Aging Report.....	249
Case Turnaround Time Report .....	254
Case Aging Detail Report.....	258
Contact Report.....	261
Contact Summary Report.....	261
Issue Report.....	264
Issue Aging Detail Report .....	264

---



---

Lead Reports.....	268
Lead Summary Report .....	268
Lead Demographic Report.....	271
Opportunity Report.....	274
Opportunity Summary.....	274
Report Listing.....	278
17 Admin – User .....	281
User Listing .....	281
Create New User.....	288
Edit User .....	290
User – Activities Subpanel.....	292
User – Activities Subpanel (New Call) .....	292
User – Activities Subpanel (New Meeting).....	294
User – Activities Subpanel (New Task) .....	296
User – History Subpanel .....	299
User – History Subpanel (New Note) .....	299
User – Direct Report Subpanel .....	300
Create New User.....	300
Select User.....	303
18 Admin – Role.....	305
Role Listing.....	305
Create New Role .....	309
Edit Role .....	311
19 Admin – Product Catalog .....	315
Product Catalog Listing .....	315
Create New Product Catalog.....	320
Edit Product Catalog.....	321
Product Catalog – Activities Subpanel.....	322
Product Catalog – Activities Subpanel (New Call) .....	322
Product Catalog – Activities Subpanel (New Meeting).....	324
Product Catalog – Activities Subpanel (New Task) .....	326
Product Catalog – History Subpanel .....	329
Product Catalog – History Subpanel (New Note).....	329
20 Admin – Holiday Setting.....	331
Holiday Setting Listing.....	331

---

---

---

	Create New Holiday Setting (By Date).....	334
	Create New Holiday Setting (By Day) .....	336
	Edit Holiday Setting.....	338
21	Admin – Work Schedule.....	339
	Work Schedule .....	339
22	Admin – Pick List.....	341
	Pick List Listing.....	341
23	Admin – Running Number.....	345
	Running Number Listing.....	345
24	Admin – Audit Trail.....	348



---

---

## Table of Figures

Figure 1.1: Claritas CRM Login Page .....	1
Figure 1.2: Password Retrieval .....	2
Figure 1.3: Password Retrieval Auto Mail .....	2
Figure 1.4: Enter New Password .....	3
Figure 2.1: Account Menu in Main Menu .....	4
Figure 2.2: Account Listing .....	4
Figure 2.3: Company Name Hyperlink .....	4
Figure 2.4: Account Management Detail Page .....	5
Figure 2.5: Create New Account Menu .....	5
Figure 2.6: Account Management Create New Page .....	6
Figure 2.7: Action > Delete Menu .....	6
Figure 2.8: Message Showing Account Deleted Successfully .....	6
Figure 2.9: Actions > Select (This Page) Menu .....	7
Figure 2.10: Actions > Unselect (This Page) Menu .....	7
Figure 2.11: Actions > Unselect (All Pages) Menu .....	7
Figure 2.12: Account Advance Search .....	8
Figure 2.13: Account Management Edit Page .....	8
Figure 2.14: Create Account - Account Details .....	9
Figure 2.15: Create Account – Correspondence Address .....	9
Figure 2.16: Create User – Other Information .....	10
Figure 2.17: Create Account - Account Details .....	10
Figure 2.18: Create Account – Correspondence Address .....	11
Figure 2.19: Create User – Other Information .....	11
Figure 2.20: New Call Management Popup .....	12
Figure 2.21: Start Date Time .....	12
Figure 2.22: Assigned To Field Auto Complete Dropdown .....	12
Figure 2.23: Assigned To Popup .....	13
Figure 2.24: Activities Subpanel List New Call .....	13
Figure 2.25: New Meeting Management Popup .....	14
Figure 2.26: Start Date Time .....	14
Figure 2.27: Assigned To Field Auto Complete Dropdown .....	14
Figure 2.28: Assigned To Popup .....	15
Figure 2.29: Activities Subpanel List New Meeting .....	15
Figure 2.30: New Task Management Popup .....	16
Figure 2.31: Start Date Time .....	16
Figure 2.32: Assigned To Field Auto Complete Dropdown .....	17
Figure 2.33: Assigned To Popup .....	17
Figure 2.34: Activities Subpanel List New Task .....	17
Figure 2.35: New Note Management Popup .....	18
Figure 2.36: History Subpanel List New Note .....	18
Figure 2.37: New Contact Management Popup .....	19
Figure 2.38: Create Contact – Contact Details .....	20
Figure 2.39: Create Contact – Business Information .....	20
Figure 2.40: Create Contact – Correspondence Address .....	20
Figure 2.41: Create Contact – Other Information .....	21
Figure 2.42: Select User Popup .....	21

---



---

Figure 2.43: New Lead Management Popup .....	22
Figure 2.44: Create Lead – Lead Details.....	23
Figure 2.45: Create Lead – Business Information .....	23
Figure 2.46: Create Lead – Correspondence Address .....	23
Figure 2.47: Create Lead – Other Information.....	23
Figure 2.48: Select Lead Popup .....	24
Figure 2.49: New Product Management Popup .....	25
Figure 2.50: Select Product Popup .....	25
Figure 2.51: New Quote Management Popup .....	26
Figure 2.52: Quotation Date .....	27
Figure 2.53: Valid Until .....	27
Figure 2.54: Quotes Subpanel List New Quote.....	28
Figure 2.55: Select Quote Popup .....	28
Figure 2.56: New Opportunity Management Popup .....	29
Figure 2.57: Create Opportunity - Opportunity Details.....	30
Figure 2.58: Account Field Auto Complete Dropdown .....	30
Figure 2.59: Account Popup.....	30
Figure 2.60: Expected Close Date.....	31
Figure 2.61: Create Opportunity - Other Information.....	31
Figure 2.62: Select Opportunity Popup.....	32
Figure 2.63: New Contract Management Popup.....	32
Figure 2.64: Product Field Auto Complete Dropdown.....	33
Figure 2.65: Product Listing Popup .....	33
Figure 2.66: Select Contract Popup .....	34
Figure 2.67: New Issue Management Popup .....	35
Figure 2.68: Create Case - Case Details.....	35
Figure 2.69: Due Date Time .....	36
Figure 2.70: Create Case – Customer Feedback Form.....	36
Figure 2.71: Create Contact – Case Resolution.....	37
Figure 2.72: Select Issue Popup.....	37
Figure 3.1: Contact Menu in Main Menu .....	38
Figure 3.2: Contact Listing.....	38
Figure 3.3: First Name and Last Name Hyperlink .....	38
Figure 3.4: Contact Management Detail Page .....	39
Figure 3.5: Create New Contact Menu .....	39
Figure 3.6: Contact Management Create New Page.....	40
Figure 3.7: Action > Delete Menu .....	40
Figure 3.8: Message Showing Contact Deleted Successfully.....	40
Figure 3.9: Actions > Select (This Page) Menu.....	41
Figure 3.10: Actions > Unselect (This Page) Menu .....	41
Figure 3.11: Actions > Unselect (All Pages) Menu .....	41
Figure 3.12: Contact Advance Search.....	42
Figure 3.13: Contact Management Edit Page.....	42
Figure 3.14: Create Contact – Contact Details.....	43
Figure 3.15: Create Contact – Password .....	43
Figure 3.16: Create Contact – Correspondence Address.....	44
Figure 3.17: Create Contact – Other Information.....	44
Figure 3.18: Create Contact – Contact Details.....	45

---

---



---

Figure 3.19: Create Contact – Password .....	45
Figure 3.20: Create Contact – Correspondence Address.....	45
Figure 3.21: Create Contact – Other Information.....	46
Figure 3.22: New Call Management Popup .....	46
Figure 3.23: Start Date Time .....	47
Figure 3.24: Assigned To Field Auto Complete Dropdown .....	47
Figure 3.25: Assigned To Popup .....	48
Figure 3.26: Activities Subpanel List New Call .....	48
Figure 3.27: New Meeting Management Popup.....	49
Figure 3.28: Start Date Time .....	49
Figure 3.29: Assigned To Field Auto Complete Dropdown .....	49
Figure 3.30: Assigned To Popup .....	50
Figure 3.31: Activities Subpanel List New Meeting.....	50
Figure 3.32: New Task Management Popup .....	51
Figure 3.33: Start Date Time .....	51
Figure 3.34: Assigned To Field Auto Complete Dropdown .....	52
Figure 3.35: Assigned To Popup .....	52
Figure 3.36: Activities Subpanel List New Task .....	52
Figure 3.37: New Note Management Popup.....	53
Figure 3.38: History Subpanel List New Note.....	53
Figure 3.39: New Contact Management Popup .....	54
Figure 3.40: Create Contact – Contact Details.....	55
Figure 3.41: Create Contact – Business Information.....	55
Figure 3.42: Create Contact – Correspondence Address.....	55
Figure 3.43: Create Contact – Other Information.....	56
Figure 3.44: Select User Popup.....	56
Figure 3.45: New Issue Management Popup .....	57
Figure 3.46: Create Case - Case Details.....	57
Figure 3.47: Due Date Time .....	58
Figure 3.48: Create Case – Customer Feedback Form.....	58
Figure 3.49: Create Contact – Case Resolution.....	59
Figure 3.50: Select Issue Popup.....	59
Figure 3.51: New Contract Management Popup.....	61
Figure 3.52: Product Field Auto Complete Dropdown.....	62
Figure 3.53: Product Listing Popup .....	62
Figure 3.54: Select Contract Popup .....	62
Figure 3.55: New Opportunity Management Popup .....	63
Figure 3.56: Create Opportunity - Opportunity Details.....	64
Figure 3.57: Contact Field Auto Complete Dropdown.....	64
Figure 3.58: Contact Popup.....	64
Figure 3.59: Expected Close Date.....	65
Figure 3.60: Create Opportunity - Other Information.....	65
Figure 3.61: Select Opportunity Popup.....	66
Figure 3.62: New Quote Management Popup .....	67
Figure 3.63: Quotation Date .....	67
Figure 3.64: Valid Until .....	68
Figure 3.65: Quotes Subpanel List New Quote .....	68
Figure 3.66: Select Quote Popup .....	69

---

---



---

Figure 4.1: Campaign Menu in Main Menu .....	70
Figure 4.2: Campaign Listing .....	70
Figure 4.3: Campaign Name Hyperlink.....	70
Figure 4.4: Campaign Management Detail Page .....	72
Figure 4.5: Create New Campaign Menu .....	72
Figure 4.6: Campaign Management Create New Page .....	73
Figure 4.7: Action > Delete Menu .....	73
Figure 4.8: Message Showing Campaign Deleted Successfully .....	73
Figure 4.9: Actions > Select (This Page) Menu .....	74
Figure 4.10: Actions > Unselect (This Page) Menu .....	74
Figure 4.11: Actions > Unselect (All Pages) Menu .....	74
Figure 4.12: Campaign Advance Search.....	75
Figure 4.13: Campaign Management Edit Page .....	75
Figure 4.14: Create Campaign - Campaign Details.....	76
Figure 4.15: Create Campaign – Campaign Planning.....	77
Figure 4.16: Start Date .....	77
Figure 4.17: End Date .....	77
Figure 4.18: Create Campaign – Campaign Statistics .....	78
Figure 4.19: Create Campaign – Campaign ROI.....	78
Figure 4.20: Edit Campaign - Campaign Details.....	79
Figure 4.21: Create Campaign – Campaign Planning.....	80
Figure 4.22: Start Date .....	80
Figure 4.23: End Date .....	80
Figure 4.24: Lead Listing Popup.....	81
Figure 4.25: Target Subpanel List Added Lead.....	81
Figure 4.26: Contact Listing Popup .....	82
Figure 4.27: Target Subpanel List Added Contact.....	82
Figure 4.28: User Listing Popup .....	83
Figure 4.29: Target Subpanel List Added User .....	83
Figure 4.30: Compose Message Popup .....	84
Figure 4.31: Target's Received Email .....	84
Figure 4.32: Compose SMS Popup.....	85
Figure 4.33: Target's Received SMS .....	85
Figure 5.1: Lead Menu in Main Menu .....	86
Figure 5.2: Lead Listing.....	86
Figure 5.3: Lead First Name and Last Name Hyperlinks .....	86
Figure 5.4: Lead Management Detail Page .....	87
Figure 5.5: Create New Lead Menu .....	87
Figure 5.6: Lead Management Create New Page .....	88
Figure 5.7: Action > Delete Menu .....	88
Figure 5.8: Message Showing Lead Deleted Successfully.....	88
Figure 5.9: Actions > Select (This Page) Menu .....	89
Figure 5.10: Actions > Unselect (This Page) Menu .....	89
Figure 5.11: Actions > Unselect (All Pages) Menu .....	89
Figure 5.12: Lead Advance Search.....	90
Figure 5.13: Lead Management Edit Page .....	90
Figure 5.14: Create Lead - Lead Details .....	91
Figure 5.15: Create Lead – Business Information .....	91

---



---

Figure 5.16: Create Lead – Correspondence Address .....	92
Figure 5.17: Create Lead – Other Information.....	92
Figure 5.18: Edit Lead - Lead Details .....	93
Figure 5.19: Edit Lead – Business Information.....	93
Figure 5.20: Create Lead – Correspondence Address .....	93
Figure 5.21: Create Lead – Other Information.....	93
Figure 5.22: Convert Lead - Contact Management Popup.....	94
Figure 5.23: Convert Lead - Status Changed to "Converted" .....	94
Figure 5.24: Account Details Panel Expanded .....	94
Figure 5.25: Opportunity Details Panel Expanded.....	95
Figure 5.26: Converted Lead Details Disabled.....	96
Figure 5.27: New Call Management Popup .....	97
Figure 5.28: Start Date Time .....	98
Figure 5.29: Assigned To Field Auto Complete Dropdown .....	98
Figure 5.30: Assigned To Popup .....	98
Figure 5.31: Activities Subpanel List New Call .....	98
Figure 5.32: New Meeting Management Popup.....	99
Figure 5.33: Start Date Time .....	100
Figure 5.34: Assigned To Field Auto Complete Dropdown .....	100
Figure 5.35: Assigned To Popup .....	100
Figure 5.36: Activities Subpanel List New Meeting.....	101
Figure 5.37: New Task Management Popup .....	101
Figure 5.38: Start Date Time .....	102
Figure 5.39: Assigned To Field Auto Complete Dropdown .....	102
Figure 5.40: Assigned To Popup .....	103
Figure 5.41: Activities Subpanel List New Task .....	103
Figure 5.42: New Note Management Popup.....	104
Figure 5.43: History Subpanel List New Note.....	104
Figure 6.1: Opportunity Menu in Main Menu.....	106
Figure 6.2: Opportunity Listing .....	106
Figure 6.3: Name Hyperlink .....	106
Figure 6.4: Opportunity Management Detail Page.....	107
Figure 6.5: Create New Opportunity Menu .....	107
Figure 6.6: Opportunity Management Create New Page.....	108
Figure 6.7: Action > Delete Menu .....	108
Figure 6.8: Message Showing Opportunity Deleted Successfully.....	108
Figure 6.9: Actions > Select (This Page) Menu.....	109
Figure 6.10: Actions > Unselect (This Page) Menu .....	109
Figure 6.11: Actions > Unselect (All Pages) Menu .....	109
Figure 6.12: Opportunity Advance Search .....	110
Figure 6.13: Opportunity Management Edit Page.....	110
Figure 6.14: Create Opportunity - Opportunity Details .....	111
Figure 6.15: Account Field Auto Complete Dropdown .....	111
Figure 6.16: Account Popup .....	111
Figure 6.17: Expected Close Date.....	112
Figure 6.18: Create Opportunity - Other Information.....	112
Figure 6.19: Edit Opportunity - Opportunity Details .....	113
Figure 6.20: Account Field Auto Complete Dropdown .....	113

---

---



---

Figure 6.21: Account Popup .....	113
Figure 6.22: Expected Close Date.....	114
Figure 6.23: Edit Opportunity - Other Information.....	114
Figure 6.24: Convert Lead - Contact Management Popup.....	115
Figure 6.25: Convert Lead - Status Changed to "Closed Won" .....	115
Figure 6.26: Converted Opportunity Details Disabled .....	115
Figure 6.27: New Call Management Popup .....	116
Figure 6.28: Start Date Time .....	117
Figure 6.29: Assigned To Field Auto Complete Dropdown .....	117
Figure 6.30: Assigned To Popup .....	117
Figure 6.31: Activities Subpanel List New Call .....	117
Figure 6.32: New Meeting Management Popup.....	118
Figure 6.33: Start Date Time .....	119
Figure 6.34: Assigned To Field Auto Complete Dropdown .....	119
Figure 6.35: Assigned To Popup .....	119
Figure 6.36: Activities Subpanel List New Meeting.....	120
Figure 6.37: New Task Management Popup .....	120
Figure 6.38: Start Date Time .....	121
Figure 6.39: Assigned To Field Auto Complete Dropdown .....	121
Figure 6.40: Assigned To Popup .....	122
Figure 6.41: Activities Subpanel List New Task .....	122
Figure 6.42: New Note Management Popup.....	123
Figure 6.43: History Subpanel List New Note .....	123
Figure 6.44: New Quote Management Popup .....	124
Figure 6.45: Quotation Date .....	125
Figure 6.46: Valid Until .....	125
Figure 6.47: Quotes Subpanel List New Quote .....	126
Figure 6.48: Select Quote Popup .....	126
Figure 6.49: New Contract Management Popup.....	127
Figure 6.50: Product Field Auto Complete Dropdown.....	127
Figure 6.51: Product Listing Popup .....	128
Figure 6.52: Select Contract Popup .....	128
Figure 7.1: Quote Menu in Main Menu .....	129
Figure 7.2: Quote Listing.....	129
Figure 7.3: Quotation Hyperlink .....	129
Figure 7.4: Quote Management Detail Page .....	130
Figure 7.5: Create New Quote Menu .....	130
Figure 7.6: Quote Management Create New Page .....	131
Figure 7.7: Action > Delete Menu .....	131
Figure 7.8: Message Showing Quote Deleted Successfully.....	131
Figure 7.9: Actions > Select (This Page) Menu.....	132
Figure 7.10: Actions > Unselect (This Page) Menu .....	132
Figure 7.11: Actions > Unselect (All Pages) Menu .....	132
Figure 7.12: Quote Advance Search.....	133
Figure 7.13: Quote Management Edit Page .....	133
Figure 7.14: Create Quote - Quote Details .....	134
Figure 7.15: Account Field Auto Complete Dropdown .....	134
Figure 7.16: Account Popup .....	135

---



---

Figure 7.17: Quotation Date .....	135
Figure 7.18: Valid Until .....	135
Figure 7.19: Create Quote - Correspondence Address .....	136
Figure 7.20: Create Quote - Other Information.....	136
Figure 7.21: Edit Quote - Quote Details.....	137
Figure 7.22: Account Field Auto Complete Dropdown .....	137
Figure 7.23: Account Popup .....	137
Figure 7.24: Quotation Date .....	138
Figure 7.25: Valid Until .....	138
Figure 7.26: Edit Quote - Correspondence Address .....	139
Figure 7.27: Edit Quote - Quote Other Information.....	139
Figure 7.28: Quote Summary .....	139
Figure 7.29: Edit Quote Discount.....	140
Figure 7.30: New Quote Item Management Popup .....	140
Figure 7.31: Product Name Field Auto Complete Dropdown .....	141
Figure 7.32: Product Listing Popup .....	141
Figure 7.33: Activities Subpanel List New Call .....	141
Figure 7.34: New Call Management Popup .....	142
Figure 7.35: Start Date Time .....	143
Figure 7.36: Assigned To Field Auto Complete Dropdown .....	143
Figure 7.37: Assigned To Popup .....	143
Figure 7.38: Activities Subpanel List New Call .....	143
Figure 7.39: New Meeting Management Popup.....	144
Figure 7.40: Start Date Time .....	145
Figure 7.41: Assigned To Field Auto Complete Dropdown .....	145
Figure 7.42: Assigned To Popup .....	145
Figure 7.43: Activities Subpanel List New Meeting.....	146
Figure 7.44: New Task Management Popup .....	146
Figure 7.45: Start Date Time .....	147
Figure 7.46: Assigned To Field Auto Complete Dropdown .....	147
Figure 7.47: Assigned To Popup .....	148
Figure 7.48: Activities Subpanel List New Task .....	148
Figure 7.49: New Note Management Popup.....	149
Figure 7.50: History Subpanel List New Note .....	149
Figure 8.1: Case Menu in Main Menu .....	150
Figure 8.2: Case Listing .....	150
Figure 8.3: Case ID Hyperlink .....	150
Figure 8.4: Case Management Detail Page.....	151
Figure 8.5: Create New Case Menu .....	151
Figure 8.6: Case Management Create New Page .....	152
Figure 8.7: Action > Delete Menu .....	152
Figure 8.8: Message Showing Case Deleted Successfully .....	152
Figure 8.9: Actions > Select (This Page) Menu.....	153
Figure 8.10: Actions > Unselect (This Page) Menu .....	153
Figure 8.11: Actions > Unselect (All Pages) Menu .....	153
Figure 8.12: Case Management Edit Page .....	154
Figure 8.13: Create Case - Case Details.....	155
Figure 8.14: Due Date Time .....	156

---

---



---

Figure 8.15: Create Case – Customer Feedback Form .....	156
Figure 8.16: Create Contact – Case Resolution.....	156
Figure 8.17: Edit Case - Case Details.....	157
Figure 8.18: Due Date Time .....	158
Figure 8.19: Edit Case – Customer Feedback Form .....	158
Figure 8.20: Edit Case – Case Resolution .....	158
Figure 8.21: New Call Management Popup .....	159
Figure 8.22: Start Date Time .....	159
Figure 8.23: Assigned To Field Auto Complete Dropdown .....	160
Figure 8.24: Assigned To Popup .....	160
Figure 8.25: Activities Subpanel List New Call .....	160
Figure 8.26: New Meeting Management Popup.....	161
Figure 8.27: Start Date Time .....	161
Figure 8.28: Assigned To Field Auto Complete Dropdown .....	162
Figure 8.29: Assigned To Popup .....	162
Figure 8.30: Activities Subpanel List New Meeting.....	162
Figure 8.31: New Task Management Popup .....	163
Figure 8.32: Start Date Time .....	163
Figure 8.33: Assigned To Field Auto Complete Dropdown .....	164
Figure 8.34: Assigned To Popup .....	164
Figure 8.35: Activities Subpanel List New Task .....	164
Figure 8.36: New Note Management Popup.....	165
Figure 8.37: History Subpanel List New Task.....	165
Figure 8.38: New Issue Management Popup .....	166
Figure 8.39: Select Issue Popup.....	167
Figure 9.1: Issue Menu in Main Menu.....	168
Figure 9.2: Issue Listing .....	168
Figure 9.3: Issue ID Hyperlink.....	169
Figure 9.4: Issue Management Detail Page.....	169
Figure 9.5: Create New Issue Menu.....	169
Figure 9.6: Issue Management Create New Page.....	170
Figure 9.7: Action > Delete Menu .....	170
Figure 9.8: Message Showing Issue Deleted Successfully .....	170
Figure 9.9: Actions > Select (This Page) Menu.....	171
Figure 9.10: Actions > Unselect (This Page) Menu .....	171
Figure 9.11: Actions > Unselect (All Pages) Menu .....	171
Figure 9.12: Issue Management Edit Page.....	172
Figure 9.13: Create Issue - Issue Details .....	173
Figure 9.14: Case Field Auto Complete Dropdown .....	173
Figure 9.15: Case Popup .....	174
Figure 9.16: Due Date Time .....	174
Figure 9.17: Create Issue – Root Cause Details.....	175
Figure 9.18: Edit Issue - Issue Details .....	175
Figure 9.19: Case Field Auto Complete Dropdown .....	176
Figure 9.20: Case Popup .....	176
Figure 9.21: Due Date Time .....	177
Figure 9.22: Edit Issue – Root Cause Details.....	177
Figure 9.23: New Call Management Popup .....	178



---



---

Figure 9.24: Start Date Time .....	178
Figure 9.25: Assigned To Field Auto Complete Dropdown .....	178
Figure 9.26: Assigned To Popup .....	179
Figure 9.27: Activities Subpanel List New Call .....	179
Figure 9.28: New Meeting Management Popup.....	180
Figure 9.29: Start Date Time .....	180
Figure 9.30: Assigned To Field Auto Complete Dropdown .....	180
Figure 9.31: Assigned To Popup .....	181
Figure 9.32: Activities Subpanel List New Meeting.....	181
Figure 9.33: New Task Management Popup .....	182
Figure 9.34: Start Date Time .....	182
Figure 9.35: Assigned To Field Auto Complete Dropdown .....	183
Figure 9.36: Assigned To Popup .....	183
Figure 9.37: Activities Subpanel List New Task .....	183
Figure 9.38: New Note Management Popup.....	184
Figure 9.39: History Subpanel List New Task.....	184
Figure 9.40: Knowledge Base Subpanel .....	185
Figure 10.1: Knowledge Base Menu in Main Menu .....	186
Figure 10.2: Knowledge Base Listing.....	186
Figure 10.3: Knowledge Base ID Hyperlink .....	187
Figure 10.4: Knowledge Base Management Detail Page .....	187
Figure 10.5: Create New Knowledge Base Menu .....	187
Figure 10.6: Knowledge Base Management Create New Page .....	188
Figure 10.7: Action > Delete Menu.....	188
Figure 10.8: Message Showing Knowledge Base Deleted Successfully .....	188
Figure 10.9: Actions > Select (This Page) Menu.....	189
Figure 10.10: Actions > Unselect (This Page) Menu .....	189
Figure 10.11: Actions > Unselect (All Pages) Menu .....	189
Figure 10.12: Knowledge Base Management Edit Page .....	190
Figure 10.13: Create Knowledge Base - Knowledge Base .....	191
Figure 10.14: Author Field Auto Complete Dropdown.....	191
Figure 10.15: Author Popup .....	192
Figure 10.16: Edit Knowledge Base - Knowledge Base .....	192
Figure 10.17: Author Field Auto Complete Dropdown.....	193
Figure 10.18: Author Popup .....	193
Figure 10.19: New Call Management Popup.....	194
Figure 10.20: Start Date Time .....	194
Figure 10.21: Assigned To Field Auto Complete Dropdown .....	195
Figure 10.22: Assigned To Popup .....	195
Figure 10.23: Activities Subpanel List New Call.....	195
Figure 10.24: New Meeting Management Popup.....	196
Figure 10.25: Start Date Time .....	196
Figure 10.26: Assigned To Field Auto Complete Dropdown .....	197
Figure 10.27: Assigned To Popup .....	197
Figure 10.28: Activities Subpanel List New Meeting .....	197
Figure 10.29: New Task Management Popup .....	198
Figure 10.30: Start Date Time .....	198
Figure 10.31: Assigned To Field Auto Complete Dropdown .....	199

---



---

Figure 10.32: Assigned To Popup .....	199
Figure 10.33: Activities Subpanel List New Task .....	199
Figure 10.34: New Note Management Popup .....	200
Figure 10.35: History Subpanel List New Task .....	200
Figure 11.1: Meeting Menu in Main Menu .....	202
Figure 11.2: Meeting Listing .....	202
Figure 11.3: Subject Hyperlink .....	202
Figure 11.4: Meeting Management Detail Page .....	203
Figure 11.5: Create New Meeting Menu .....	203
Figure 11.6: Meeting Management Create New Page .....	203
Figure 11.7: Action > Delete Menu .....	204
Figure 11.8: Message Showing Meeting Deleted Successfully .....	204
Figure 11.9: Actions > Select (This Page) Menu .....	204
Figure 11.10: Actions > Unselect (This Page) Menu .....	205
Figure 11.11: Actions > Unselect (All Pages) Menu .....	205
Figure 11.12: Meeting Advance Search .....	205
Figure 11.13: Meeting Management Edit Page .....	206
Figure 11.14: Create New Meeting – Meeting Details .....	206
Figure 11.15: Start Date Time .....	207
Figure 11.16: Assigned To Field Auto Complete Dropdown .....	207
Figure 11.17: Assigned To Popup .....	208
Figure 11.18: Edit Meeting – Meeting Details .....	208
Figure 11.19: Start Date Time .....	209
Figure 11.20: Assigned To Field Auto Complete Dropdown .....	209
Figure 11.21: Assigned To Popup .....	210
Figure 12.1: Call Menu in Main Menu .....	211
Figure 12.2: Call Listing .....	211
Figure 12.3: Subject Hyperlink .....	211
Figure 12.4: Call Management Detail Page .....	212
Figure 12.5: Create New Call Menu .....	212
Figure 12.6: Call Management Create New Page .....	212
Figure 12.7: Action > Delete Menu .....	213
Figure 12.8: Message Showing Call Deleted Successfully .....	213
Figure 12.9: Actions > Select (This Page) Menu .....	213
Figure 12.10: Actions > Unselect (This Page) Menu .....	214
Figure 12.11: Actions > Unselect (All Pages) Menu .....	214
Figure 12.12: Call Advance Search .....	214
Figure 12.13: Call Management Edit Page .....	215
Figure 12.14: Create New Call – Call Details .....	216
Figure 12.15: Start Date Time .....	216
Figure 12.16: Assigned To Field Auto Complete Dropdown .....	217
Figure 12.17: Assigned To Popup .....	217
Figure 12.18: Edit Call – Call Details .....	218
Figure 12.19: Start Date Time .....	218
Figure 12.20: Assigned To Field Auto Complete Dropdown .....	219
Figure 12.21: Assigned To Popup .....	219
Figure 13.1: Task Menu in Main Menu .....	220
Figure 13.2: Task Listing .....	220

---



---

Figure 13.3: Subject Hyperlink .....	220
Figure 13.4: Task Management Detail Page .....	221
Figure 13.5: Create New Task Menu .....	221
Figure 13.6: Task Management Create New Page .....	221
Figure 13.7: Action > Delete Menu .....	222
Figure 13.8: Message Showing Task Deleted Successfully .....	222
Figure 13.9: Actions > Select (This Page) Menu .....	222
Figure 13.10: Actions > Unselect (This Page) Menu .....	223
Figure 13.11: Actions > Unselect (All Pages) Menu .....	223
Figure 13.12: Task Advance Search .....	223
Figure 13.13: Task Management Edit Page .....	224
Figure 13.14: Create Task – Task Details .....	225
Figure 13.15: Start Date Time .....	225
Figure 13.16: Assigned To Field Auto Complete Dropdown .....	226
Figure 13.17: Assigned To Popup .....	226
Figure 13.18: Edit Task – Task Details .....	227
Figure 13.19: Start Date Time .....	227
Figure 13.20: Assigned To Field Auto Complete Dropdown .....	228
Figure 13.21: Assigned To Popup .....	228
Figure 14.1: Note Menu in Main Menu .....	229
Figure 14.2: Note Listing .....	229
Figure 14.3: Subject Hyperlink .....	230
Figure 14.4: Note Management Detail Page .....	230
Figure 14.5: Create New Note Menu .....	230
Figure 14.6: Note Management Create New Page .....	231
Figure 14.7: Action > Delete Menu .....	231
Figure 14.8: Message Showing Note Deleted Successfully .....	231
Figure 14.9: Actions > Select (This Page) Menu .....	232
Figure 14.10: Actions > Unselect (This Page) Menu .....	232
Figure 14.11: Actions > Unselect (All Pages) Menu .....	232
Figure 14.12: Note Advance Search .....	233
Figure 14.13: Note Management Edit Page .....	233
Figure 14.14: Create Note – Note Details .....	234
Figure 14.15: Edit Note – Note Details .....	235
Figure 15.1: Email Menu in Main Menu .....	236
Figure 15.2: Email Listing .....	236
Figure 15.3: Subject Hyperlink .....	237
Figure 15.4: Email Management Detail Page .....	237
Figure 15.5: Reply – Compose Message Popup .....	237
Figure 15.6: Reply All – Compose Message Popup .....	238
Figure 15.7: Action > Delete Menu .....	238
Figure 15.8: Message Showing Email Deleted Successfully .....	238
Figure 15.9: Actions > Select (This Page) Menu .....	239
Figure 15.10: Actions > Unselect (This Page) Menu .....	239
Figure 15.11: Actions > Unselect (All Pages) Menu .....	239
Figure 15.12: Email Advance Search .....	240
Figure 16.1: Report Menu in Main Menu .....	241
Figure 16.2: Case Summary Report (Case Owner) .....	241

---



---

Figure 16.3: Case Summary Report (Feedback Type) .....	242
Figure 16.4: Case Summary Report (Feedback Source).....	242
Figure 16.5: Case Summary Report (Case Priority) .....	243
Figure 16.6: Filtered Case Summary Report .....	243
Figure 16.7: Find Textbox in Case Summary Report .....	244
Figure 16.8: Export Case Summary Report .....	244
Figure 16.9: Print Popup .....	244
Figure 16.10: Report Menu in Main Menu.....	245
Figure 16.11: Case Trend Report (Case Owner) .....	245
Figure 16.12: Case Trend Report (Feedback Type).....	246
Figure 16.13: Case Trend Report (Feedback Source) .....	246
Figure 16.14: Case Trend Report (Case Priority) .....	247
Figure 16.15: Filtered Case Trend Report.....	247
Figure 16.16: Find Textbox in Case Trend Report.....	248
Figure 16.17: Export Case Trend Report .....	248
Figure 16.18: Print Popup .....	248
Figure 16.19: Report Menu in Main Menu.....	249
Figure 16.20: Case Aging Report (Case Owner) .....	249
Figure 16.21: Case Aging Report (Feedback Type) .....	250
Figure 16.22: Case Aging Report (Feedback Source) .....	250
Figure 16.23: Case Aging Report (Case Priority).....	251
Figure 16.24: Filtered Case Aging Report.....	252
Figure 16.25: Find Textbox in Case Aging.....	253
Figure 16.26: Export Case Aging Report.....	253
Figure 16.27: Print Popup .....	253
Figure 16.28: Report Menu in Main Menu.....	254
Figure 16.29: Case Turnaround Time Report (Case Owner) .....	254
Figure 16.30: Case Turnaround Time Report (Feedback Type).....	255
Figure 16.31: Case Turnaround (Feedback Source).....	255
Figure 16.32: Case Turnaround (Case Priority) .....	256
Figure 16.33: Filtered Case Turnaround Time Report .....	256
Figure 16.34: Find Textbox in Case Turnaround .....	257
Figure 16.35: Export Case Turnaround Time Report .....	257
Figure 16.36: Print Popup .....	257
Figure 16.37: Report Menu in Main Menu.....	258
Figure 16.38: Case Aging Detail Report (Outstanding Cases) .....	258
Figure 16.39: Case Aging Detail Report (Overdue Cases) .....	259
Figure 16.40: Filtered Case Aging Detail Report .....	259
Figure 16.41: Find Textbox in Case Turnaround .....	260
Figure 16.42: Export Case Aging Detail Report .....	260
Figure 16.43: Print Popup .....	260
Figure 16.44: Report Menu in Main Menu.....	261
Figure 16.45: Contact Summary Report (Outstanding Cases) .....	261
Figure 16.46: Filtered Contact Summary Report .....	262
Figure 16.47: Find Textbox in Contact Summary Report.....	262
Figure 16.48: Export Contact Summary Report .....	262
Figure 16.49: Print Popup .....	263
Figure 16.50: Report Menu in Main Menu.....	264

---



---

Figure 16.51: Issue Aging Detail Report (Outstanding Cases) .....	264
Figure 16.52: Issue Aging Detail Report (Overdue Cases) .....	265
Figure 16.53: Filtered Issue Aging Detail Report .....	265
Figure 16.54: Find Textbox in Case Turnaround .....	266
Figure 16.55: Export Issue Aging Detail Report .....	266
Figure 16.56: Print Popup .....	266
Figure 16.57: Report Menu in Main Menu .....	268
Figure 16.58: Lead Summary Report .....	268
Figure 16.59: Filtered Lead Summary Report .....	269
Figure 16.60: Find Textbox in Lead Summary Report .....	269
Figure 16.61: Export Lead Summary Report .....	270
Figure 16.62: Print Popup .....	270
Figure 16.63: Report Menu in Main Menu .....	271
Figure 16.64: Lead Demographic Report .....	271
Figure 16.65: Filtered Lead Demographic Report .....	272
Figure 16.66: Find Textbox in Lead Demographic Report .....	272
Figure 16.67: Export Lead Demographic Report .....	273
Figure 16.68: Print Popup .....	273
Figure 16.69: Report Menu in Main Menu .....	274
Figure 16.70: Opportunity Summary Report .....	274
Figure 16.71: Opportunity Summary Report (Feedback Type) .....	275
Figure 16.72: Opportunity Summary Report (Account) .....	275
Figure 16.73: Filtered Opportunity Summary Report .....	276
Figure 16.74: Find Textbox in Opportunity Summary Report .....	276
Figure 16.75: Export Opportunity Summary Report .....	277
Figure 16.76: Print Popup .....	277
Figure 16.77: Report Menu in Main Menu .....	278
Figure 16.78: Report Listing .....	278
Figure 16.79: Report Name Hyperlink .....	278
Figure 16.80: Report Popup .....	279
Figure 16.81: Report Advance Search .....	280
Figure 17.1: Admin Menu in Main Menu .....	281
Figure 17.2: User Menu in Admin Management Page .....	281
Figure 17.3: User Listing .....	281
Figure 17.4: First Name and Last Name Hyperlink .....	282
Figure 17.5: User Maintenance Detail Page .....	282
Figure 17.6: Reset Password Popup .....	283
Figure 17.7: Create New User Menu .....	283
Figure 17.8: User Maintenance Create New Page .....	284
Figure 17.9: Action > Delete Menu .....	284
Figure 17.10: Message Showing User Deleted Successfully .....	285
Figure 17.11: Actions > Select (This Page) Menu .....	285
Figure 17.12: Actions > Unselect (This Page) Menu .....	285
Figure 17.13: Actions > Unselect (All Pages) Menu .....	286
Figure 17.14: User Advance Search .....	286
Figure 17.15: User Maintenance Edit Page .....	287
Figure 17.16: User Change Password .....	287
Figure 17.17: Create User - User Profile .....	288

---

---



---

Figure 17.18: Create User - User Details .....	288
Figure 17.19: Create User - Password .....	289
Figure 17.20: Create User – Business Information.....	289
Figure 17.21: Create User – Correspondence Address.....	289
Figure 17.22: Create User – Other Information.....	290
Figure 17.23: Edit User - User Profile .....	290
Figure 17.24: User Change Password.....	291
Figure 17.25: Edit User – Business Information.....	291
Figure 17.26: Edit User – Correspondence Address.....	292
Figure 17.27: Edit User – Other Information .....	292
Figure 17.28: New Call Management Popup.....	293
Figure 17.29: Start Date Time.....	293
Figure 17.30: Assigned To Field Auto Complete Dropdown .....	293
Figure 17.31: Assigned To Popup .....	294
Figure 17.32: Activities Subpanel List New Call.....	294
Figure 17.33: New Meeting Management Popup.....	295
Figure 17.34: Start Date Time .....	295
Figure 17.35: Assigned To Field Auto Complete Dropdown .....	295
Figure 17.36: Assigned To Popup .....	296
Figure 17.37: Activities Subpanel List New Meeting .....	296
Figure 17.38: New Task Management Popup .....	297
Figure 17.39: Start Date Time .....	297
Figure 17.40: Assigned To Field Auto Complete Dropdown .....	298
Figure 17.41: Assigned To Popup .....	298
Figure 17.42: Activities Subpanel List New Task.....	298
Figure 17.43: New Note Management Popup .....	299
Figure 17.44: History Subpanel List New Task .....	299
Figure 17.45: New User Management Popup .....	301
Figure 17.46: Create User - User Profile .....	302
Figure 17.47: Create User - User Details .....	302
Figure 17.48: Create User - Password .....	302
Figure 17.49: Create User – Remarks .....	302
Figure 17.50: Create User – Correspondence Address.....	303
Figure 17.51: Create User – Other Information.....	303
Figure 17.52: Select User Popup.....	304
Figure 18.1: Admin Menu in Main Menu.....	305
Figure 18.2: Role Menu in Admin Management Page .....	305
Figure 18.3: Role Listing .....	305
Figure 18.4: Role Name Hyperlink .....	306
Figure 18.5: Role Maintenance Detail Page .....	306
Figure 18.6: Create New Role Menu.....	306
Figure 18.7: Role Maintenance Create New Page .....	307
Figure 18.8: Action > Delete Menu.....	307
Figure 18.9: Delete Confirmation Message Box.....	307
Figure 18.10: Role Maintenance Edit Page .....	308
Figure 18.11: On-Click Edit Role .....	309
Figure 18.12: Role Name Text Box .....	309
Figure 18.13: Role Maintenance Edit Page .....	312

---



---

Figure 18.14: On-Click Edit Role .....	312
Figure 18.15: On-Click Edit Role .....	314
Figure 19.1: Admin Menu in Main Menu.....	315
Figure 19.2: Product Catalog Menu in Admin Management Page .....	315
Figure 19.3: Product Catalog Listing.....	315
Figure 19.4: Product Catalog ID Hyperlink.....	316
Figure 19.5: Product Catalog Management Detail Page .....	316
Figure 19.6: Create New Product Catalog Menu .....	316
Figure 19.7: Product Catalog Management Create New Page.....	317
Figure 19.8: Action > Delete Menu.....	317
Figure 19.9: Message Showing Product Catalog Deleted Successfully.....	317
Figure 19.10: Actions > Select (This Page) Menu .....	318
Figure 19.11: Actions > Unselect (This Page) Menu .....	318
Figure 19.12: Actions > Unselect (All Pages) Menu .....	318
Figure 19.13: Product Catalog Management Edit Page.....	319
Figure 19.14: Create Product Catalog - Product Catalog Details.....	320
Figure 19.15: Create Product Catalog – Product Catalog Support .....	320
Figure 19.16: Edit Product Catalog - Product Catalog Details .....	321
Figure 19.17: Create Product Catalog – Product Catalog Support .....	321
Figure 19.18: New Call Management Popup.....	322
Figure 19.19: Start Date Time .....	323
Figure 19.20: Assigned To Field Auto Complete Dropdown .....	323
Figure 19.21: Assigned To Popup .....	323
Figure 19.22: Activities Subpanel List New Call.....	324
Figure 19.23: New Meeting Management Popup.....	324
Figure 19.24: Start Date Time .....	325
Figure 19.25: Assigned To Field Auto Complete Dropdown .....	325
Figure 19.26: Assigned To Popup .....	325
Figure 19.27: Activities Subpanel List New Meeting .....	326
Figure 19.28: New Task Management Popup .....	326
Figure 19.29: Start Date Time .....	327
Figure 19.30: Assigned To Field Auto Complete Dropdown .....	327
Figure 19.31: Assigned To Popup .....	328
Figure 19.32: Activities Subpanel List New Task.....	328
Figure 19.33: New Note Management Popup .....	329
Figure 19.34: History Subpanel List New Task .....	329
Figure 20.1: Admin Menu in Main Menu.....	331
Figure 20.2: Holiday Setting Menu in Admin Management Page.....	331
Figure 20.3: Holiday Setting Listing and Add Holiday Detail Form.....	332
Figure 20.4: Date Hyperlink.....	332
Figure 20.5: Create New Holiday Setting Menu .....	332
Figure 20.6: Add Holiday Detail Form.....	333
Figure 20.7: Holiday Detail Save Successful Dialog .....	333
Figure 20.8: Delete Holiday Setting.....	333
Figure 20.9: Message Showing Holiday Setting Deleted Successfully .....	333
Figure 20.10: Holiday Setting Advance Search.....	334
Figure 20.11: Holiday Detail Update .....	334
Figure 20.12: Create Holiday by Date - Holiday Detail.....	335

---



---

Figure 20.13: Holiday Date Field .....	335
Figure 20.14: Create Holiday by Day – Holiday Detail .....	336
Figure 20.15: Holiday Created by Day .....	337
Figure 20.16: Holiday Date Field .....	338
Figure 21.1: Admin Menu in Main Menu .....	339
Figure 21.2: Work Schedule Menu in Admin Management Page .....	339
Figure 21.3: Work Schedule .....	340
Figure 22.1: Admin Menu in Main Menu .....	341
Figure 22.2: Pick List Menu in Admin Management Page .....	341
Figure 22.3: Pick List Page .....	342
Figure 22.4: Pick List Detail .....	342
Figure 22.5: Add Group to PickList .....	343
Figure 22.6: Add Item to PickList .....	344
Figure 22.7: Add Item to PickList .....	344
Figure 23.1: Admin Menu in Main Menu .....	345
Figure 23.2: Running Number Menu in Admin Management Page .....	345
Figure 23.3: Running Number Page .....	345
Figure 23.4: Running Number Detail .....	346
Figure 23.5: Date Format and Examples .....	347
Figure 24.1: Admin Menu in Main Menu .....	348
Figure 24.2: Audit Trail Menu in Admin Management Page .....	348
Figure 24.3: Running Number Page .....	348
Figure 24.4: Audit Trail Log .....	349



---

---

# 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.

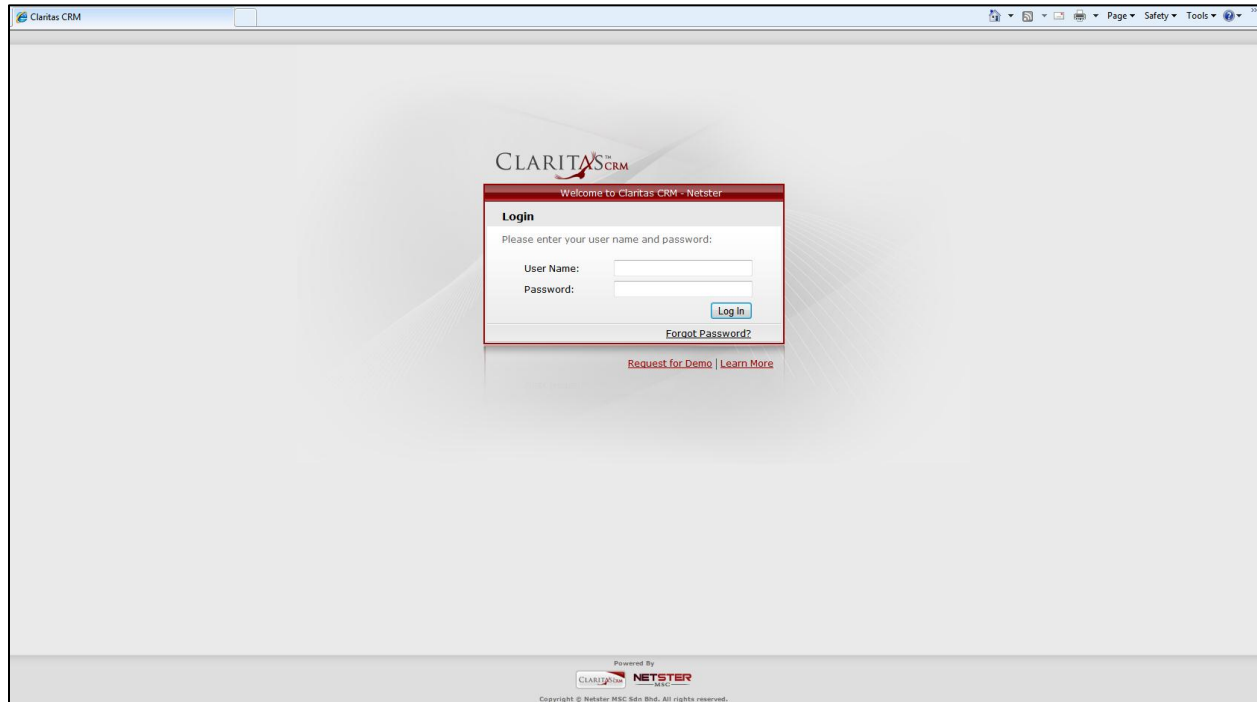


Figure 1.1: Claritas CRM Login Page

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  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.*



The screenshot shows the Claritas CRM login and password retrieval interface. At the top, the logo 'CLARITAS CRM' is displayed. Below it, a red banner reads 'Welcome to Claritas CRM'. The main section is titled 'Login' and contains a form with the following elements:

- A heading: 'Please enter your user name and password:'
- Two input fields: 'User Name:' and 'Password:'.
- A 'Log In' button.
- A link: '[Forgot Password?](#)'
- A second form section with an input field for 'User Name:' containing the text 'scyip'.
- A confirmation message: 'New password has been sent to [redacted]@netstermsc.com'.
- A 'Submit' button.

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.

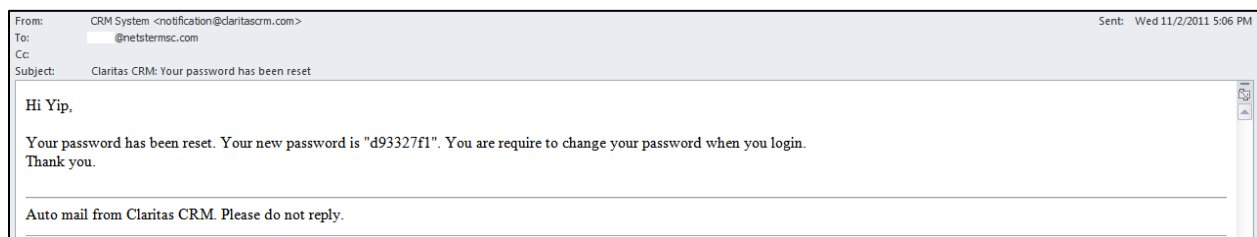


Figure 1.3: Password Retrieval Auto Mail

---

---

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:

Welcome to Claritas CRM

### Change Password

You are require to change your password for first time login.

New Password

Confirm Password

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.

The screenshot shows the Account Management page with a table of accounts. The table has columns for Company, Type, Industry, Country, Phone, Fax, Website, and Updated By. The first row is highlighted with a red box.

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

Figure 2.2: Account Listing

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

The screenshot shows the Account Management page with a table of accounts. The 'Company Name' column is highlighted with a red box, indicating that the hyperlink is being clicked.

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

Figure 2.3: Company Name Hyperlink

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

**Account Management > Netster MSC Sdn Bhd**

Edit Cancel Copy New

**Account Details**

Company	Netster MSC Sdn Bhd	Reg Number	
Parent Company		Email	
Alternative Name		Website	http://www.netstermsc.com
Type	Shareholder		

**Correspondence Address**

<b>Billing</b>		<b>Shipping</b>	
Address 1		Address 1	
Address 2		Address 2	
Address 3		Address 3	
City		City	
Postcode		Postcode	
State		State	
Country	Malaysia	Country	
Phone	+60378054185	Phone	+60378054185
Fax	+60378054184	Fax	+60378054184

**Other Information**

Industry	Technology	Company Size	
Annual Revenue		Company Rating	
Note			

**System Information**

Created Date	11/08/2011 03:21:26 PM	Created By	FTSB\ucyip
Last Updated Date	11/08/2011 03:24:12 PM	Last Updated By	FTSB\ucyip

Activities

History

Contacts

Leads

Products

Quotes

Opportunities

Contracts

Cases

**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.

**Account Management**

Actions **Create New** Selected: 0

**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**.

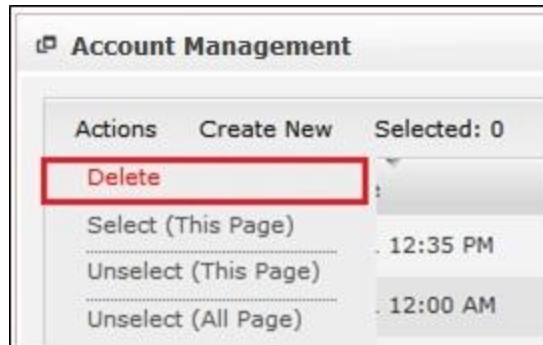


Figure 2.7: Action > Delete Menu

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)**.

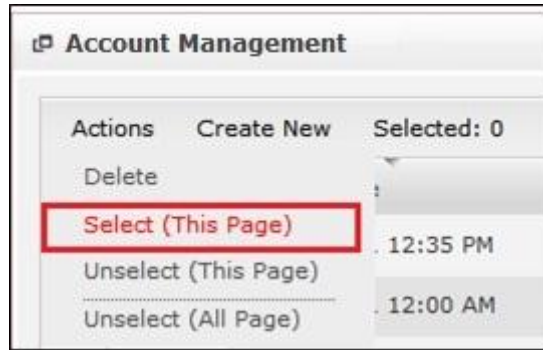


Figure 2.9: Actions > Select (This Page) Menu

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

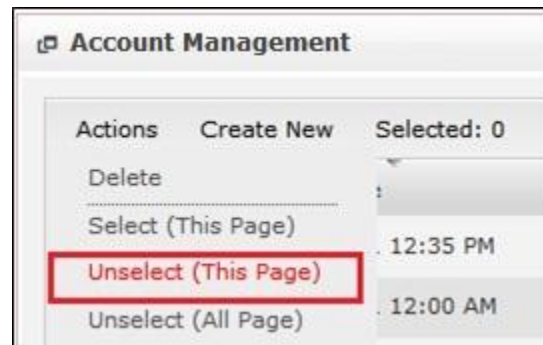


Figure 2.10: Actions > Unselect (This Page) Menu

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

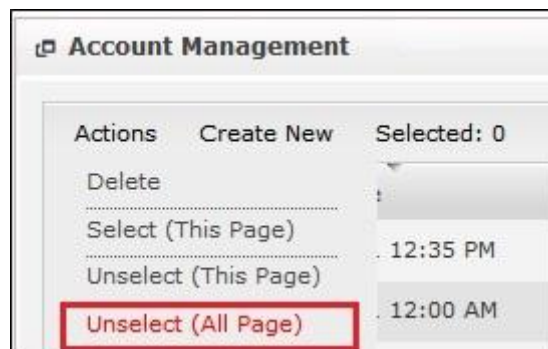






Figure 2.11: Actions > Unselect (All Pages) Menu

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.

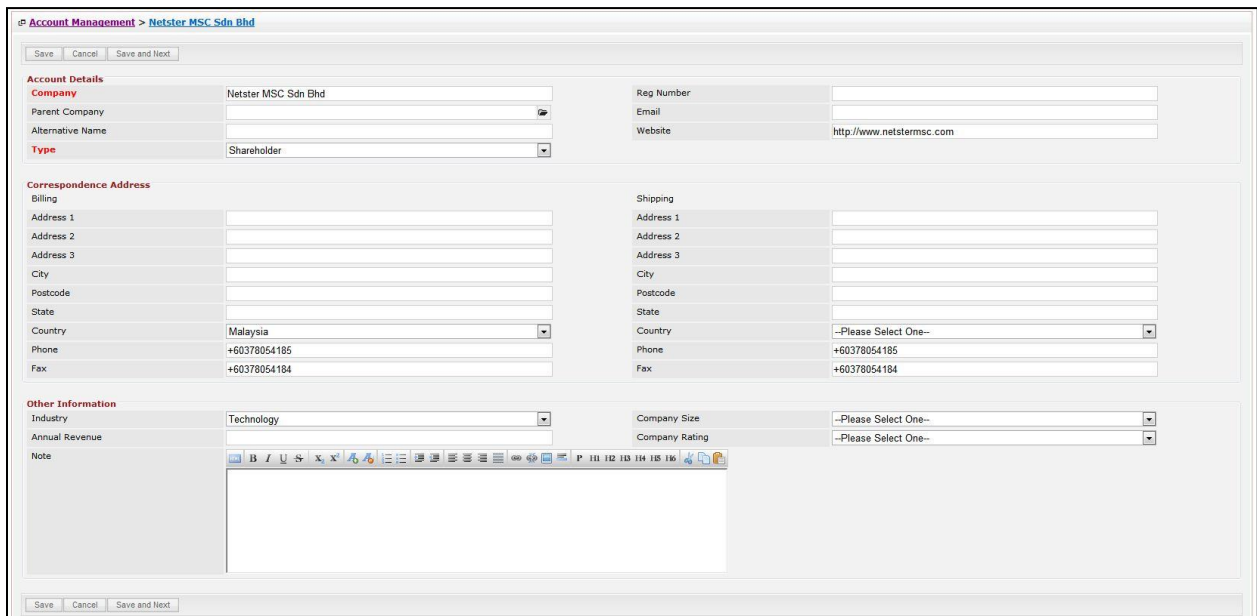


Figure 2.13: Account Management Edit Page

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**.

<b>Account Details</b>			
<b>Company</b>	Netster MSC Sdn Bhd (Kuala Lumpur)	Reg Number	
Parent Company	Netster MSC Sdn Bhd	Email	admin@netstermsc.com
Alternative Name		Website	http://www.netstermsc.com
<b>Type</b>	Shareholder		

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)

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

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  button. Page will navigate back to **Account Listing** page.

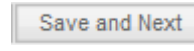
## Edit Account

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

 button in **Account Management Detail** page. After clicking the **Edit**  button or  button, page will navigate to **Account Management Edit** page. Edit the relevant details and click

 button to save the changes and navigates back to **Account Management Detail** page or click

 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)

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

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.

Other Information	
Industry	Technology
Annual Revenue	
Note	<p>Netbiter MSC (NC) is a your strategic partner in web businesses. We are based in Malaysia, also with presence in Singapore, Indonesia, Cambodia, Taiwan and Australia. NC is Microsoft Gold Certified Partner and MSC Status Company - recognition of technology excellence in the development of ISV business solutions. Our philosophy is to deliver quality results through strategic partnership and technology innovation. We take care of client's Internet business need, so that you can focus on growing your core business!</p>
Company Size	--Please Select One--
Company Rating	--Please Select One--

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.*

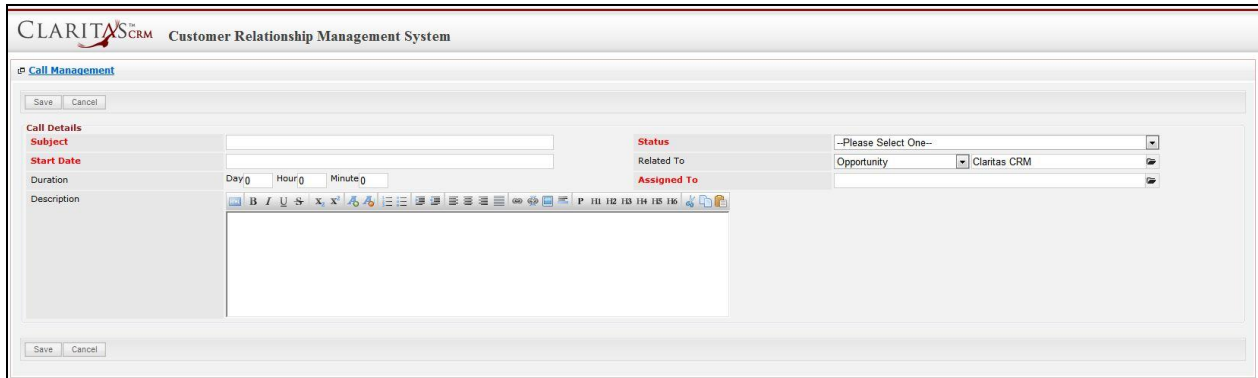


Figure 2.20: New Call Management Popup

- 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.

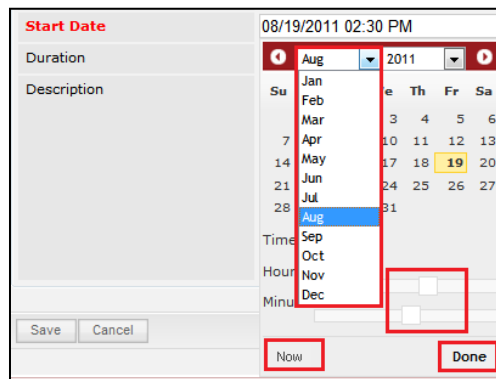




Figure 2.21: Start Date Time

- **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:
  - 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)



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

Figure 2.23: Assigned To Popup

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

New Call, Status: Planned, Assigned To: [kenix](#), and a Remove button. Below the table is a pagination bar showing 'Page 1 of 1' and 'Displaying 1 to 1 of 1 items'." data-bbox="116 359 885 448"/>




Module	Date	Subject	Status	Assigned To	Remove
 Call	08/19/2011 12:04 PM	<a href="#">New Call</a>	Planned	<a href="#">kenix</a>	 Remove

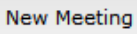


Figure 2.24: Activities Subpanel List New Call

To **cancel creating New Call**, click  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  button to **confirm**.

Clicking  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  menu at **Activities** subpanel.

Once  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  button to create the New Meeting. Or click  menu to cancel creating New Meeting.

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

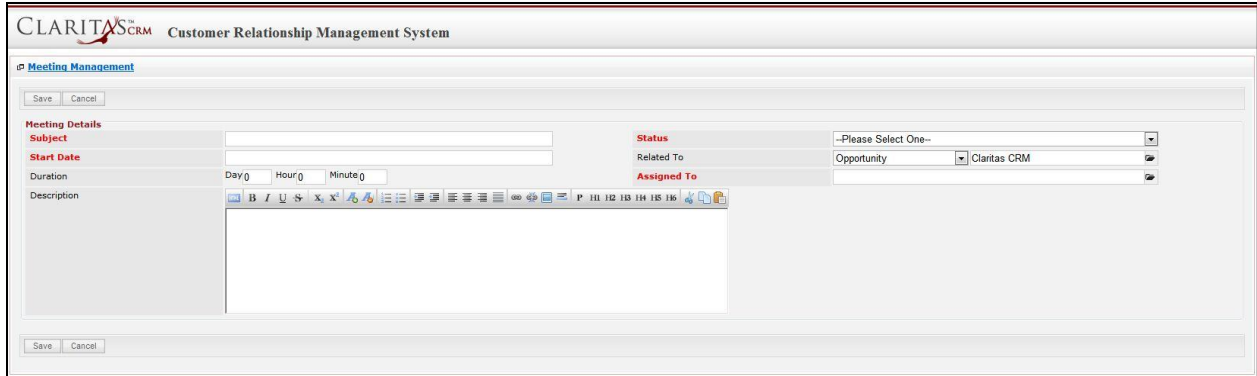


Figure 2.25: New Meeting Management Popup

- 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.

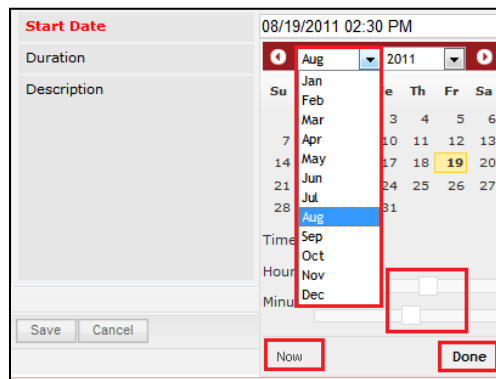




Figure 2.26: Start Date Time

- **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:
  - 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

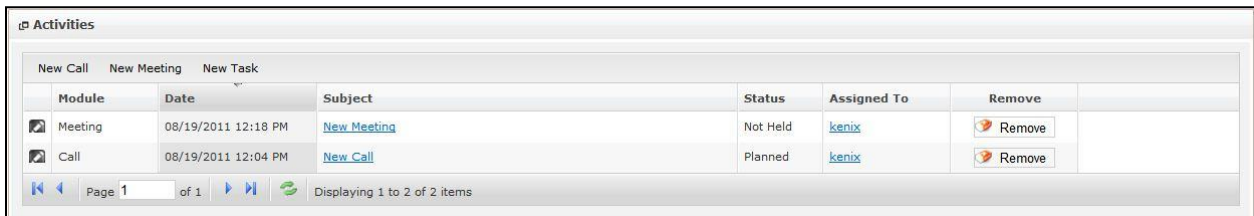
- ii. Click at the  button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



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

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	<a href="#">New Meeting</a>	Not Held	<a href="#">kenix</a>	 Remove
 Call	08/19/2011 12:04 PM	<a href="#">New Call</a>	Planned	<a href="#">kenix</a>	 Remove

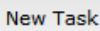



Figure 2.29: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click  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  button to **confirm**.

Clicking  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  menu at **Activities** subpanel. Once  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  button to create the New Task. Or click  menu to cancel creating New Task.

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

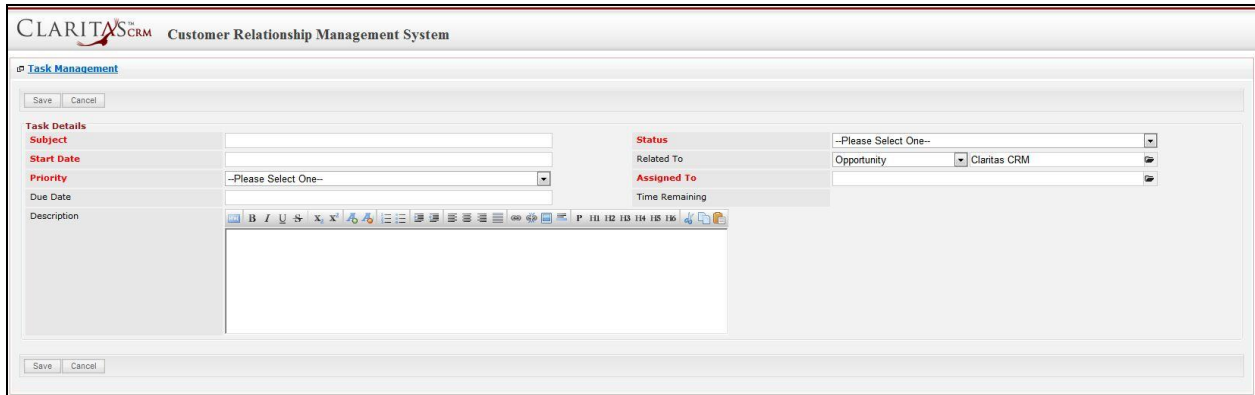


Figure 2.30: New Task Management Popup

- 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.

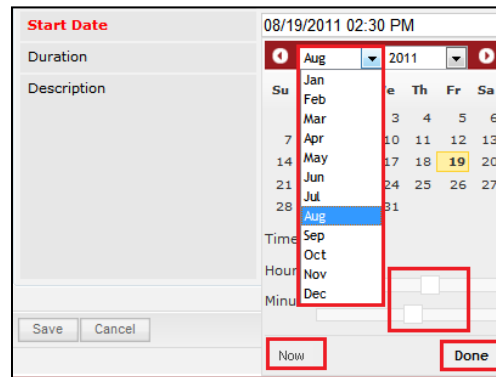


Figure 2.31: Start Date Time

- **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:
  - 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

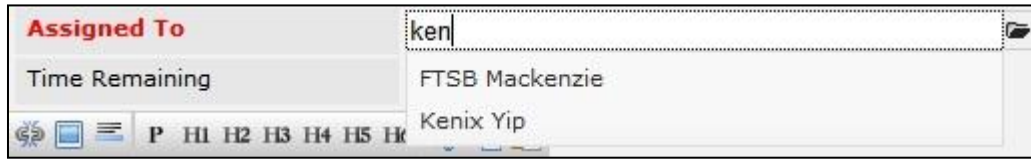


Figure 2.32: Assigned To Field Auto Complete Dropdown


- 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)





Figure 2.33: Assigned To Popup

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



Figure 2.34: Activities Subpanel List New Task

To **cancel creating New Task**, click  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  button to **confirm**.

Clicking  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.

Module	Date	Subject	Attachment	Remove
Note	08/19/2011 03:23 PM	<a href="#">New Note</a>		Remove

Figure 2.36: 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.

## 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  menu at **Contact List** subpanel.

Once  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  button to create the New Contact.

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

The screenshot shows the 'New Contact Management' popup window in the CLARITAS CRM system. The window title is 'CLARITAS CRM Customer Relationship Management System' and the subpanel is 'Contact Management'. The form is divided into several sections: 'Contact Details' with fields for Picture (with a 'Browse...' button), Salutation (dropdown), First Name, Last Name (highlighted in red), Status (dropdown), Email, and Website; 'Business Information' with fields for Job Title, Department, Account (dropdown, showing 'Netster MSC Sdn Bhd'), Source, and Reporting To (dropdown); 'Correspondence Address' with two columns of fields for Business and Home addresses, including Address 1-3, City, Postcode, State, Country (dropdown), Phone, and Fax; and 'Other Information' with fields for Occupation, Date Of Birth, Marital Status, NRIC, and Gender (dropdown). A rich text editor for 'Note' is at the bottom, with a 'Save' and 'Cancel' button at the bottom right.

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

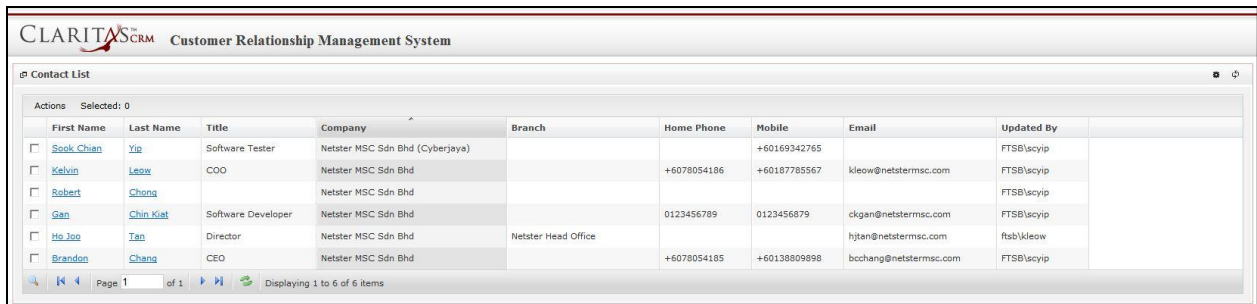
To **cancel creating New Contact**, click  button. A confirmation dialog showing “Are you sure you want to close this window?” will prompt user to cancel creating New Contact and close the window.

Click  button to **confirm**.

Clicking  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  menu. Once  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**.



Actions	Selected: 0	First Name	Last Name	Title	Company	Branch	Home Phone	Mobile	Email	Updated By
<input type="checkbox"/>		<a href="#">Soek Chian</a>	<a href="#">Yip</a>	Software Tester	Netster MSC Sdn Bhd (Cyberjaya)			+60169342765		FTSB\acyip
<input type="checkbox"/>		<a href="#">Kelvin</a>	<a href="#">Leow</a>	COO	Netster MSC Sdn Bhd		+6078054186	+60187785567	kleow@netstermsc.com	FTSB\acyip
<input type="checkbox"/>		<a href="#">Robert</a>	<a href="#">Chong</a>		Netster MSC Sdn Bhd					FTSB\acyip
<input type="checkbox"/>		<a href="#">Gan</a>	<a href="#">Chin Kiat</a>	Software Developer	Netster MSC Sdn Bhd		0123456789	0123456879	ckgan@netstermsc.com	FTSB\acyip
<input type="checkbox"/>		<a href="#">Ho Joe</a>	<a href="#">Tan</a>	Director	Netster MSC Sdn Bhd	Netster Head Office			hjtjan@netstermsc.com	ftsb\kleow
<input type="checkbox"/>		<a href="#">Brandon</a>	<a href="#">Chang</a>	CEO	Netster MSC Sdn Bhd		+6078054185	+60138809898	bcchang@netstermsc.com	FTSB\acyip

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.*

The screenshot shows the 'Lead Management' popup window in the CLARITAS CRM system. The form is titled 'Lead Management' and includes a 'Save' and 'Cancel' button at the top left. The form is organized into several sections:

- Lead Details:** Includes fields for Picture (with a 'Browse...' button), Salutation (dropdown), First Name, Last Name (highlighted in red), Status (dropdown, highlighted in red), Email, and Website.
- Business Information:** Includes Job Title, Department, Source (dropdown), and Account (dropdown, currently set to 'Netster MSC Sdn Bhd').
- Correspondence Address:** Divided into 'Business' and 'Home' sections, each with fields for Address 1, Address 2, Address 3, City, Postcode, State, and Country (dropdown).
- Other Information:** Includes Occupation (dropdown), Date Of Birth, Marital Status (dropdown), NRIC, and Gender (dropdown).

At the bottom of the form, there is a 'Note' field with a rich text editor toolbar and a 'Save' and 'Cancel' button.

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)

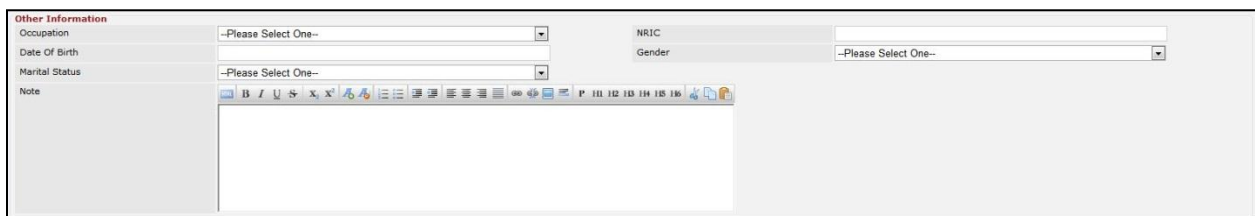


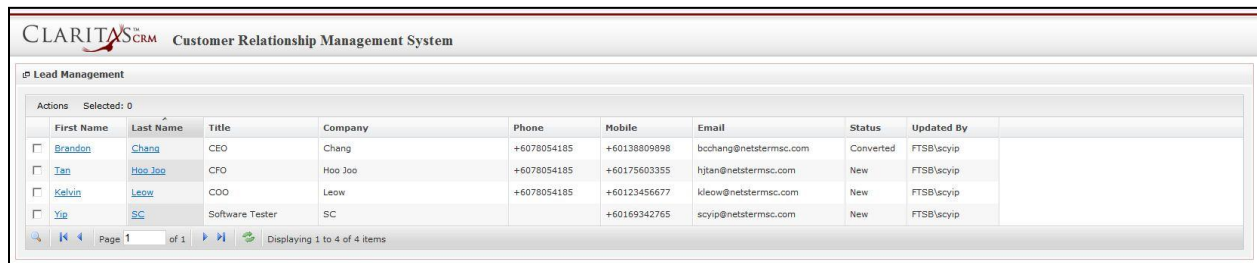
Figure 2.47: Create Lead – Other Information

To **cancel creating New Lead**, click  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  button to **confirm**.

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

## Select Lead

To select a **Lead** to this **Account**, click at the  menu. Once  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**.



The screenshot shows the CLARITAS CRM Customer Relationship Management System interface. The main window is titled "Lead Management" and displays a table of leads. The table has columns for First Name, Last Name, Title, Company, Phone, Mobile, Email, Status, and Updated By. There are four rows of data, each with a checkbox in the first column. The first row is for Brandon Chang, CEO at Chang, with phone +6078054185 and mobile +60138809898. The second row is for Tan Hoo Joo, CFO at Hoo Joo, with phone +6078054185 and mobile +60175603355. The third row is for Kelvin Leow, COO at Leow, with phone +6078054185 and mobile +60123456677. The fourth row is for Yip SC, Software Tester at SC, with phone +60169342765 and mobile +60169342765. The status for the first row is "Converted" and for the others is "New". The updated by field for all rows is "FTSB\scyp".

Actions	Selected: 0	First Name	Last Name	Title	Company	Phone	Mobile	Email	Status	Updated By
<input type="checkbox"/>		Brandon	Chang	CEO	Chang	+6078054185	+60138809898	bcchang@netstermsc.com	Converted	FTSB\scyp
<input type="checkbox"/>		Tan	Hoo Joo	CFO	Hoo Joo	+6078054185	+60175603355	htan@netstermsc.com	New	FTSB\scyp
<input type="checkbox"/>		Kelvin	Leow	COO	Leow	+6078054185	+60123456677	kleow@netstermsc.com	New	FTSB\scyp
<input type="checkbox"/>		Yip	SC	Software Tester	SC	+60169342765	+60169342765	scyp@netstermsc.com	New	FTSB\scyp

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  menu at **Product List** subpanel.

Once  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  button to create the New Product.

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



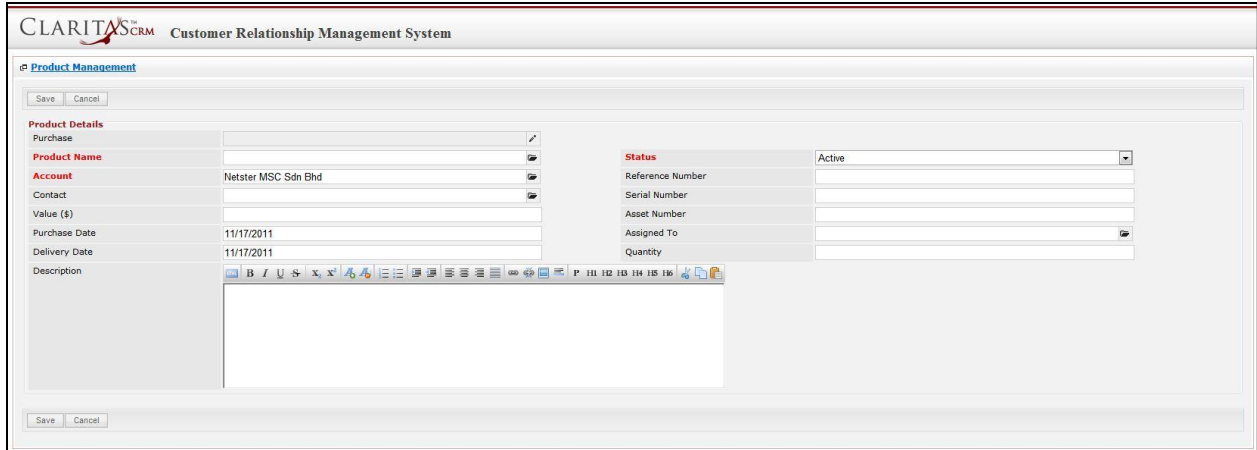


Figure 2.49: New Product Management Popup

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  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  button to **confirm**.

Clicking  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  menu. Once  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.*

The screenshot displays the 'CLARITAS CRM Customer Relationship Management System' interface. The main window is titled 'Quote Management' and contains several sections:

- Quote Details:** A table with fields for Quotation, Title, Account (populated with 'Netster MSC Sdn Bhd'), Contact, Opportunity (populated with 'Claritas CRM'), Quotation Date (populated with '11/09/2011'), and Valid Until.
- Status and Payment Terms:** Two dropdown menus, both currently set to '--Please Select One--'. Below them are fields for 'Assigned To' and 'Reference Number 1'.
- Validity Remaining:** A field for tracking the quote's validity.
- Correspondence Address:** A section with two columns: 'Billing' and 'Shipping'. Each column contains fields for Address 1, Address 2, Address 3, City, Postcode, State, and Country (dropdown).
- Other Information:** A text area for notes with a rich text editor toolbar.

Buttons for 'Save' and 'Cancel' are located at the top left and bottom left of the window.

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.

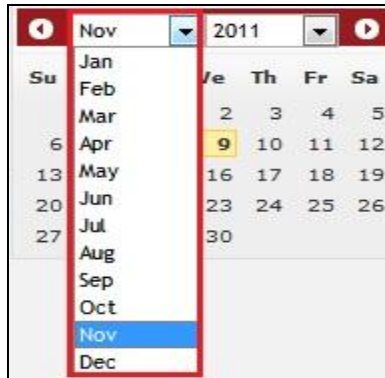


Figure 2.52: Quotation Date

- **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.

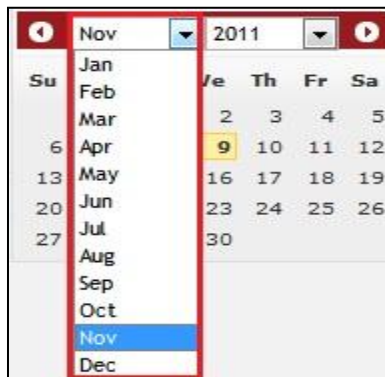


Figure 2.53: Valid Until

- **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  button or copy the address from the related Contact by clicking the  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.

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

Figure 2.54: Quotes Subpanel List New Quote

To **cancel creating New Quote**, click 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 button to **confirm**.

Clicking 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 menu. Once 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**.

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

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.*

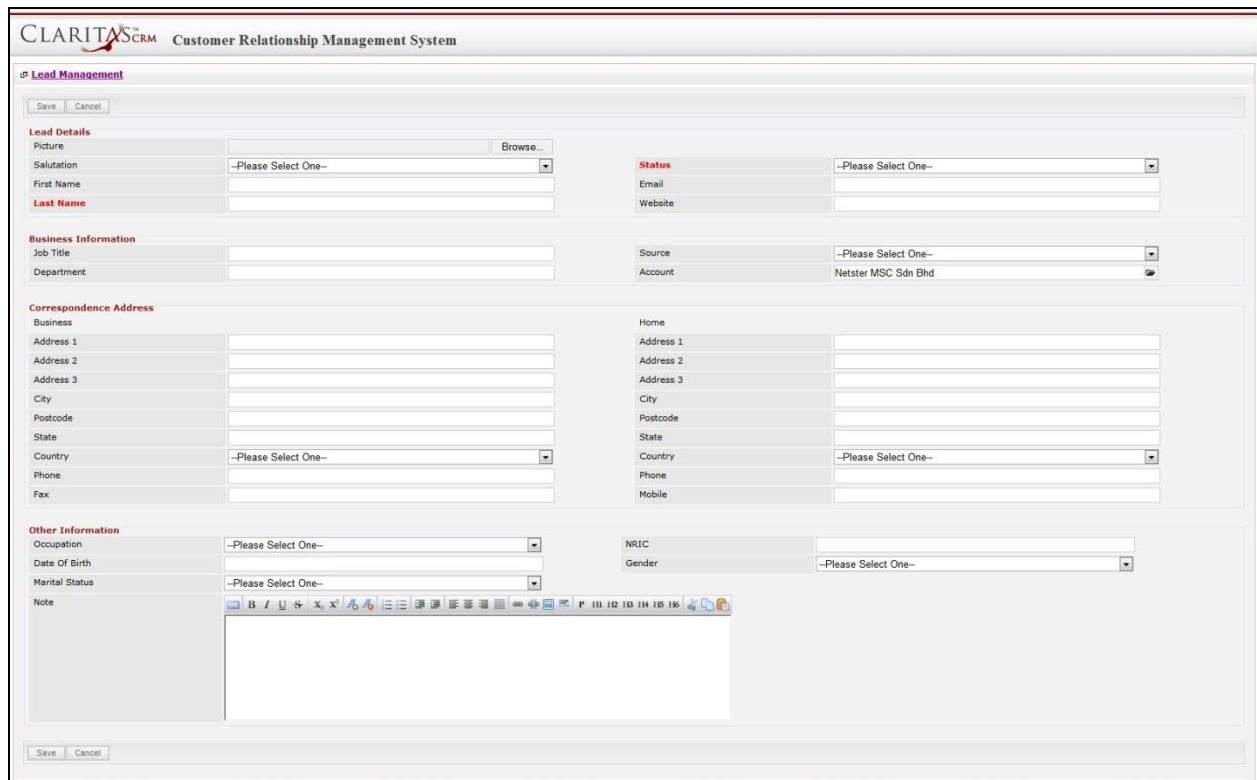


Figure 2.56: New Opportunity Management Popup

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:
  - 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


- 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.

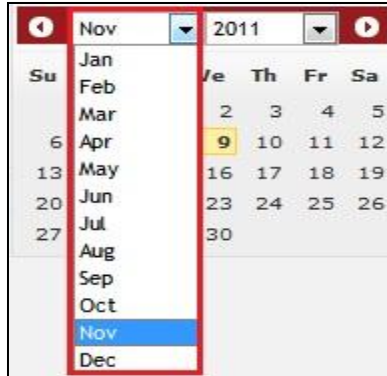


Figure 2.60: Expected Close Date

## 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  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  button to **confirm**.

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

## Select Opportunity

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

CLARITAS CRM Customer Relationship Management System

Opportunity List

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/Quo	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 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.*

CLARITAS CRM Customer Relationship Management System

Contract Management

Save Cancel

Contract Details

Contract

**Contract Name**

Type

**Account**

Contract

Opportunity

**Product**

Value

Description

**Status**

Reference Number

Assigned To

Start Date

End Date

Time Remaining

SLA

Save Cancel

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:

- 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



- 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  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  button to **confirm**.

Clicking  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  menu. Once  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
<input type="checkbox"/>	<a href="#">CTR20110628-02</a> Centium Contract	Contract - 12 Month	Centium Software Sdn Bhd	Dell EqualLogic PS6000	9,999.00	08/24/2011	-82 Day(s)	Active	Kenix Yip
<input type="checkbox"/>	<a href="#">CTR20111114-09</a> Claritas Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
<input type="checkbox"/>	<a href="#">CTR20111114-06</a> Netster Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
<input type="checkbox"/>	<a href="#">CTR20111114-07</a> CRM Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
<input type="checkbox"/>	<a href="#">CTR20111114-08</a> CMS Contract	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
<input type="checkbox"/>	<a href="#">CTR20111114-10</a> 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.*

The screenshot shows the 'CLARITAS CRM Customer Relationship Management System' interface. The 'Case Management' window is open, displaying a form with three main sections: 'Case Details', 'Customer Feedback Form', and 'Case Resolution'. The 'Case Details' section includes fields for Case, Type, Source, Account, Contact, Status, Assigned To, Priority, Due Date, and Time Remaining. The 'Customer Feedback Form' section includes fields for First Name, Last Name, Title, Company, Salutation, Home Phone, Mobile, and Email. The 'Case Resolution' section includes a Subject field and two rich text editors for Description and Resolution. The form is titled 'New Issue Management PopUp'.

Figure 2.67: New Issue Management PopUp

#### 1) Case Details

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

The screenshot shows the 'Create Case - Case Details' form with the following filled-in fields:

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 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.

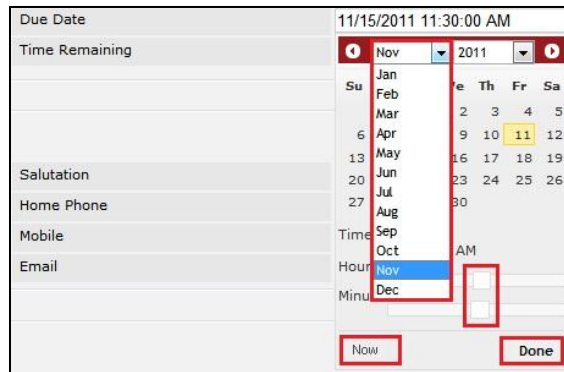


Figure 2.69: Due Date Time

- 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

Customer Feedback Form			
First Name	Mohd	Salutation	Mr
Last Name	Razlan	Home Phone	+60378054186
Title	Director	Mobile	+60175564132
Company	Razlan & Friend Associates	Email	razlan@netstermsc.com

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.

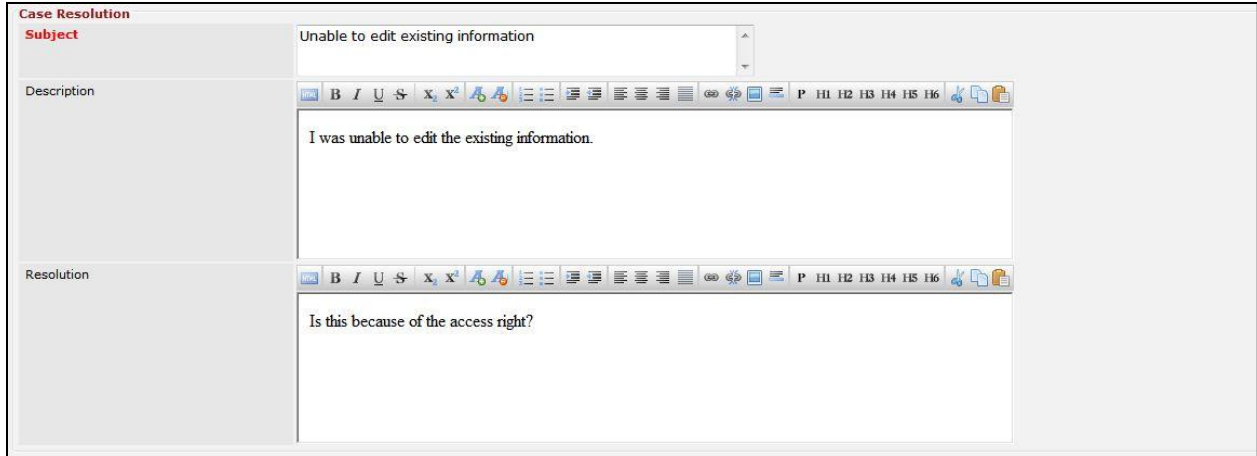


Figure 2.71: Create Contact – Case Resolution

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	<a href="#">CRD20111111-157</a>	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	<a href="#">CRD20111111-156</a>	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	<a href="#">CRD20111103-155</a>	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	<a href="#">CRD20111019-154</a>	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	<a href="#">CRD20111018-153</a>	Compliment	Email		Netster MSC Sdn Bhd (Kuala Lumpur)	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	<a href="#">CRD20110922-128</a>	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	<a href="#">CRD20110921-126</a>	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	<a href="#">CRD20110908-125</a>	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	<a href="#">CRD20110908-125a</a>	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	<a href="#">CRD20110728-116</a>	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	<a href="#">CRD20110627-70</a>	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	<a href="#">CRD20110613-27</a>	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	<a href="#">CRD000021-21</a>	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	<a href="#">CRD000016-16</a>	Complaint	Other		Telesto Connet 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.

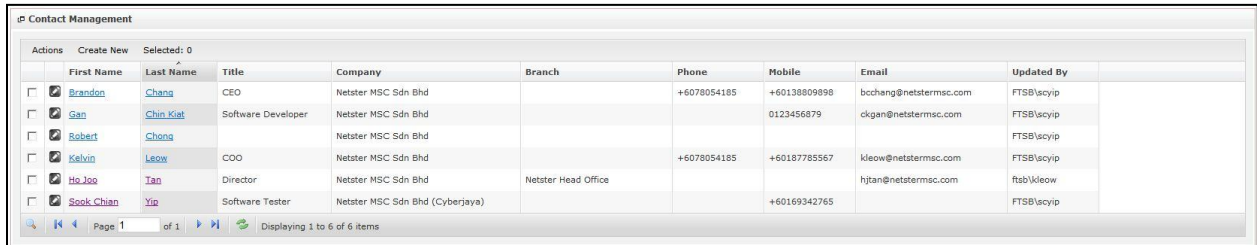
#### Contact Listing

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.

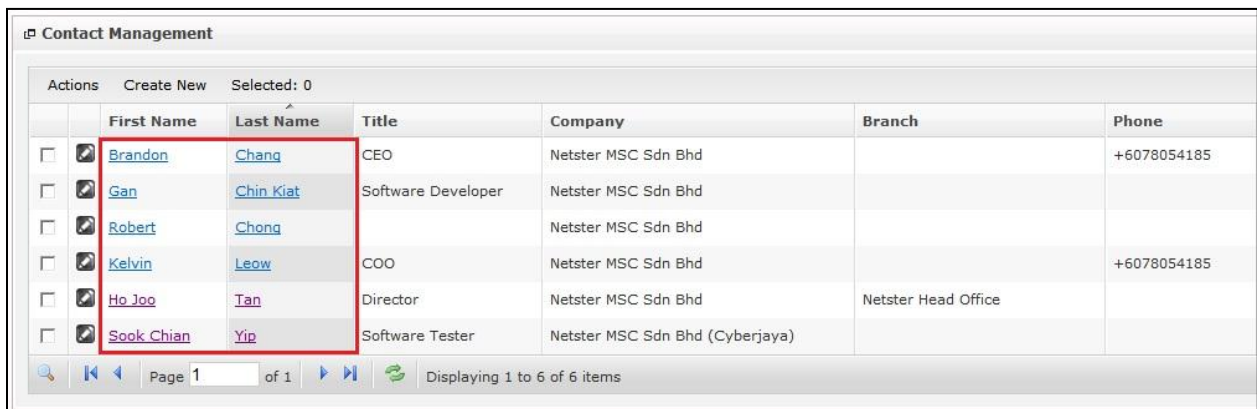


The screenshot shows the Contact Management page with a table of contacts. The table has columns for First Name, Last Name, Title, Company, Branch, Phone, Mobile, Email, and Updated By. The first row is highlighted, and the first name and last name are hyperlinked.

Actions	Create New	Selected: 0	First Name	Last Name	Title	Company	Branch	Phone	Mobile	Email	Updated By
<input type="checkbox"/>	<input checked="" type="checkbox"/>		<a href="#">Brandon</a>	<a href="#">Chang</a>	CEO	Netster MSC Sdn Bhd		+6078054185	+60138809898	bchang@netstermsc.com	FTSB\scyip
<input type="checkbox"/>	<input checked="" type="checkbox"/>		<a href="#">Gan</a>	<a href="#">Chin Kiat</a>	Software Developer	Netster MSC Sdn Bhd			0123456879	ckgan@netstermsc.com	FTSB\scyip
<input type="checkbox"/>	<input checked="" type="checkbox"/>		<a href="#">Robert</a>	<a href="#">Chong</a>		Netster MSC Sdn Bhd					FTSB\scyip
<input type="checkbox"/>	<input checked="" type="checkbox"/>		<a href="#">Kelvin</a>	<a href="#">Leow</a>	COO	Netster MSC Sdn Bhd		+6078054185	+60187785567	kleow@netstermsc.com	FTSB\scyip
<input type="checkbox"/>	<input checked="" type="checkbox"/>		<a href="#">Ho Joo</a>	<a href="#">Tan</a>	Director	Netster MSC Sdn Bhd	Netster Head Office			hjtan@netstermsc.com	ftsb\kleow
<input type="checkbox"/>	<input checked="" type="checkbox"/>		<a href="#">Sook Chian</a>	<a href="#">Yip</a>	Software Tester	Netster MSC Sdn Bhd (Cyberjaya)				+60169342765	FTSB\scyip

Figure 3.2: Contact Listing

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



The screenshot shows the Contact Management page with a table of contacts. The first name and last name columns are highlighted with a red box, indicating they are hyperlinks.

Actions	Create New	Selected: 0	First Name	Last Name	Title	Company	Branch	Phone
<input type="checkbox"/>	<input checked="" type="checkbox"/>		<a href="#">Brandon</a>	<a href="#">Chang</a>	CEO	Netster MSC Sdn Bhd		+6078054185
<input type="checkbox"/>	<input checked="" type="checkbox"/>		<a href="#">Gan</a>	<a href="#">Chin Kiat</a>	Software Developer	Netster MSC Sdn Bhd		
<input type="checkbox"/>	<input checked="" type="checkbox"/>		<a href="#">Robert</a>	<a href="#">Chong</a>		Netster MSC Sdn Bhd		
<input type="checkbox"/>	<input checked="" type="checkbox"/>		<a href="#">Kelvin</a>	<a href="#">Leow</a>	COO	Netster MSC Sdn Bhd		+6078054185
<input type="checkbox"/>	<input checked="" type="checkbox"/>		<a href="#">Ho Joo</a>	<a href="#">Tan</a>	Director	Netster MSC Sdn Bhd	Netster Head Office	
<input type="checkbox"/>	<input checked="" type="checkbox"/>		<a href="#">Sook Chian</a>	<a href="#">Yip</a>	Software Tester	Netster MSC Sdn Bhd (Cyberjaya)		


Figure 3.3: First Name and Last Name Hyperlink

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

☰ Contact Management > Brandon Chang

Edit Cancel Copy New

**Contact Details**

Picture 

Salutation Mr Status Active

First Name Brandon Email bchang@netstermsc.com

Last Name Chang Website http://www.netstermsc.com

**Business Information**

Job Title CEO Source Campaign

Department Management Reporting To

Account [Netster MSC Sdn Bhd](#)

**Correspondence Address**

Business		Home	
Address 1	246-248, Kelana Center Point	Address 1	246-248, Kelana Center Point
Address 2	3, Jalan SS7/19	Address 2	3, Jalan SS7/19
Address 3	Kelana Jaya	Address 3	Kelana Jaya
City	Petaling Jaya	City	Petaling Jaya
Postcode	47301	Postcode	47301
State	Selangor	State	Selangor
Country	Malaysia	Country	Malaysia
Phone	+6078054185	Phone	+6078054185
Fax	+6078054184	Mobile	+60138009898

**Other Information**

Occupation Management NRIC 781108555665

Date Of Birth 11/08/1978 Gender Male

Marital Status Married

Note

**System Information**

Created Date	11/08/2011 06:58:36 PM	Created By	FTSB\scvip
Last Updated Date	11/08/2011 06:58:36 PM	Last Updated By	FTSB\scvip

☰ Activities

☰ History

☰ Direct Reports

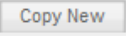
☰ Cases

☰ Contracts

☰ Opportunities

☰ Quotes

Figure 3.4: Contact Management Detail Page



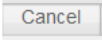
To copy the entire record and save as a new record, click  button at **Contact Maintenance Detail** page.

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

☰ Contact Management

Actions  Selected: 0

Figure 3.5: Create New Contact Menu

After clicking  menu, page will navigate to **Contact Management** page. Enter the relevant details and click  button to save the changes and navigates to **Contact Management Detail** page or click  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**.

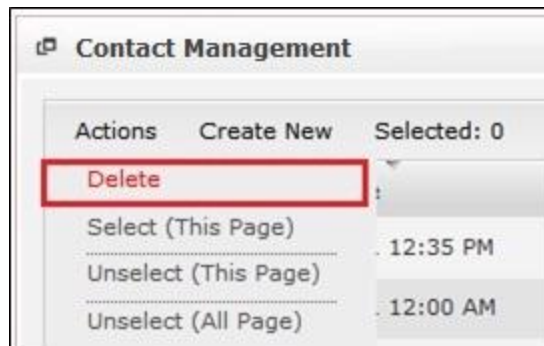


Figure 3.7: Action > Delete Menu

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)**.

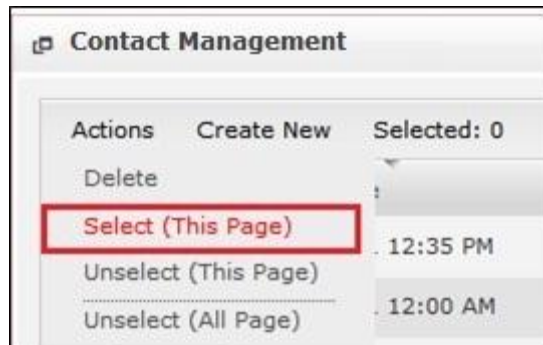


Figure 3.9: Actions > Select (This Page) Menu

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)**.

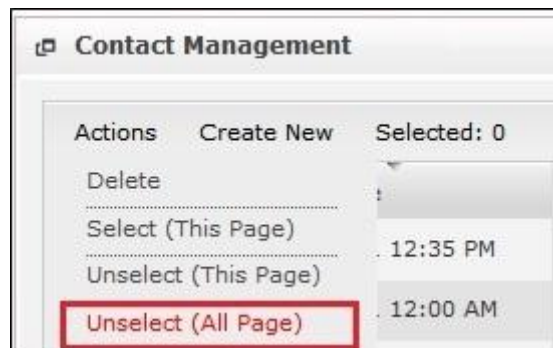






Figure 3.11: Actions > Unselect (All Pages) Menu

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.

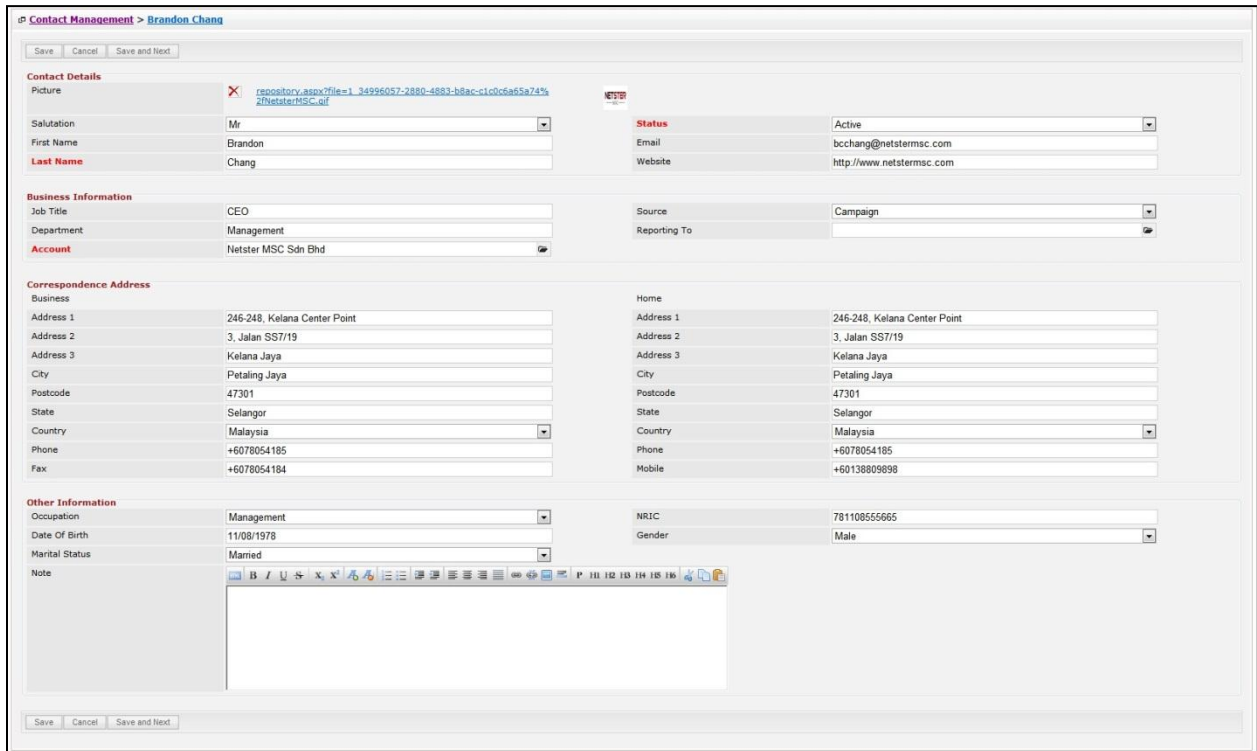




Figure 3.13: Contact Management Edit Page


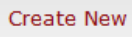

---

---

Edit the relevant details and click  button to save the changes and navigates back to **Contact Management Detail** page. Or click  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  menu at the top of the **Contact Listing**. After clicking  menu, page will navigate to **Contact Management** page. Enter the relevant details and click  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)

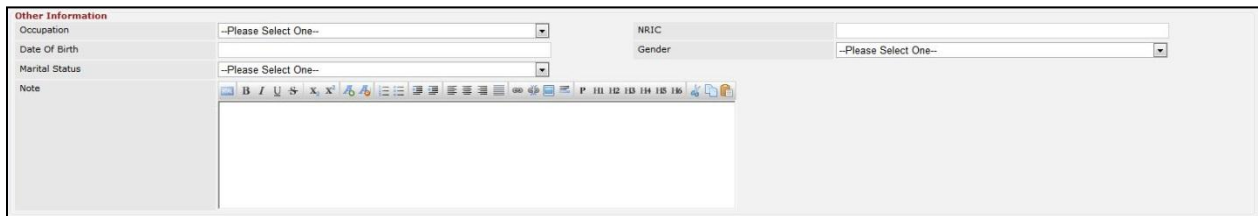


Figure 3.17: Create Contact – Other Information

To cancel creating New Contact, click  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**



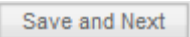
button in **Contact Listing** page or click at the Name hyperlink in **Contact Listing** page then click the



button in **Contact Management Detail** page. After clicking the **Edit**  button or 

button, page will navigate to **Contact Management Edit** page. Edit the relevant details and click 

button to save the changes and navigates back to **Contact Management Detail** page or click



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**

<b>Contact Details</b>	
Picture	<input type="text"/> Browse...
Salutation	--Please Select One--
<b>Last Name</b>	<input type="text"/>
First Name	<input type="text"/>
<b>Status</b>	Active
Email	<input type="text"/>
Website	<input type="text"/>

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**.

<b>Business Information</b>	
Job Title	<input type="text"/>
Department	<input type="text"/>
<b>Account</b>	Netster MSC Sdn Bhd
Source	--Please Select One--
Reporting To	<input type="text"/>

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)

<b>Correspondence Address</b>	
<b>Business</b>	
Address 1	<input type="text"/>
Address 2	<input type="text"/>
Address 3	<input type="text"/>
City	<input type="text"/>
Postcode	<input type="text"/>
State	<input type="text"/>
Country	--Please Select One--
Phone	<input type="text"/>
Fax	<input type="text"/>
<b>Home</b>	
Address 1	<input type="text"/>
Address 2	<input type="text"/>
Address 3	<input type="text"/>
City	<input type="text"/>
Postcode	<input type="text"/>
State	<input type="text"/>
Country	--Please Select One--
Phone	<input type="text"/>
Mobile	<input type="text"/>

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.*

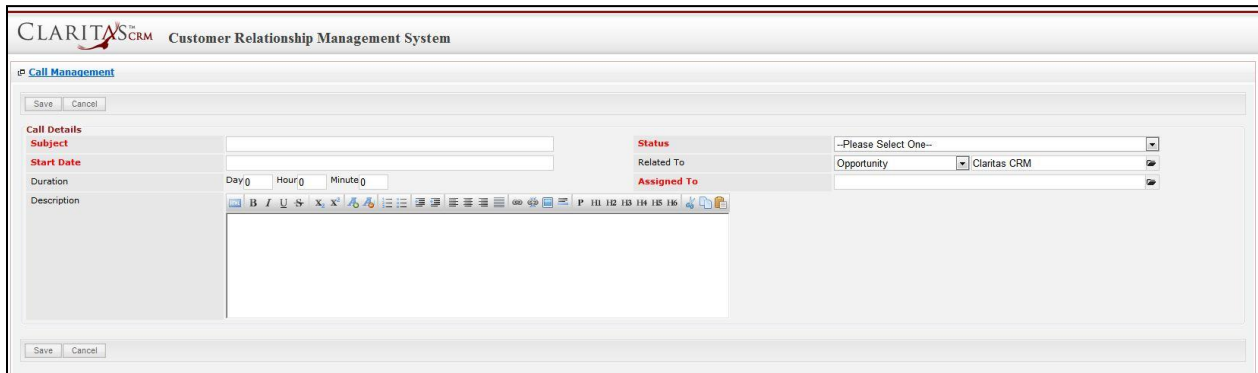


Figure 3.22: New Call Management PopUp

- 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.

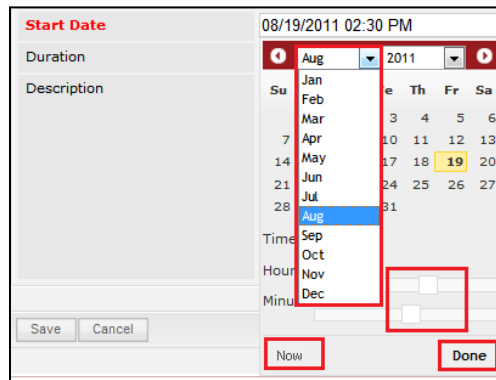



Figure 3.23: Start Date Time

- **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:
  - 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

- 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 <sup>SM</sup> CRM Customer Relationship Management System							
User List							
User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	<a href="#">System</a>	<a href="#">Admin</a>	Administrator	Active	1	admin@netstermsc.com	<a href="#">Blank</a>
farid	<a href="#">Farid</a>	<a href="#">Bin Faisal</a>	Administrator	Active		scyip@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
irwan	<a href="#">Mohd Irwan</a>	<a href="#">Rizal</a>		Active	0122390079	admin@netstermsc.com	<a href="#">System Admin</a>
razlan	<a href="#">Mohd Razlan</a>	<a href="#">Bin Abdul Rahma</a>	Administrator	Active		admin@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
scyip	<a href="#">Blank</a>	<a href="#">kenix</a>	User	Active		scyip@netstermsc.com	<a href="#">Blank</a>

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						
Module	Date	Subject	Status	Assigned To	Remove	
Call	08/19/2011 12:04 PM	<a href="#">New Call</a>	Planned	<a href="#">kenix</a>	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  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  button to **confirm**.

Clicking  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  menu at **Activities** subpanel.

Once  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  button to create the New Meeting. Or click  menu to cancel creating New Meeting.

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



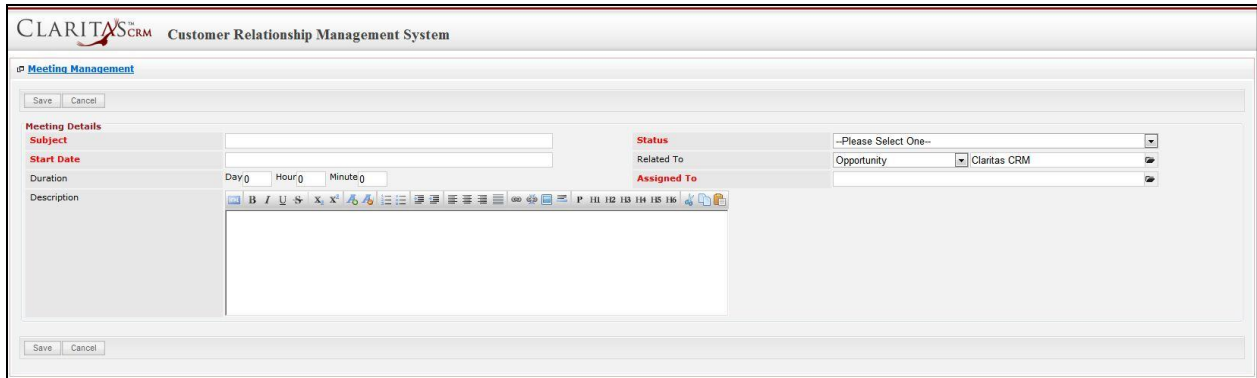


Figure 3.27: New Meeting Management Popup

- 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.

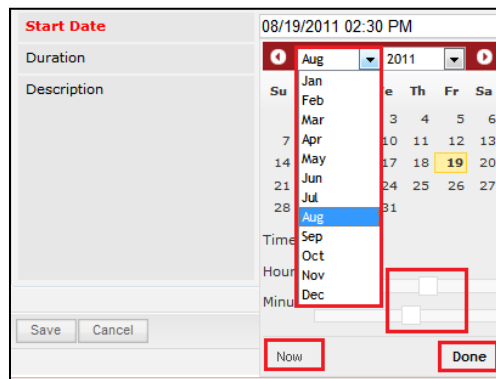



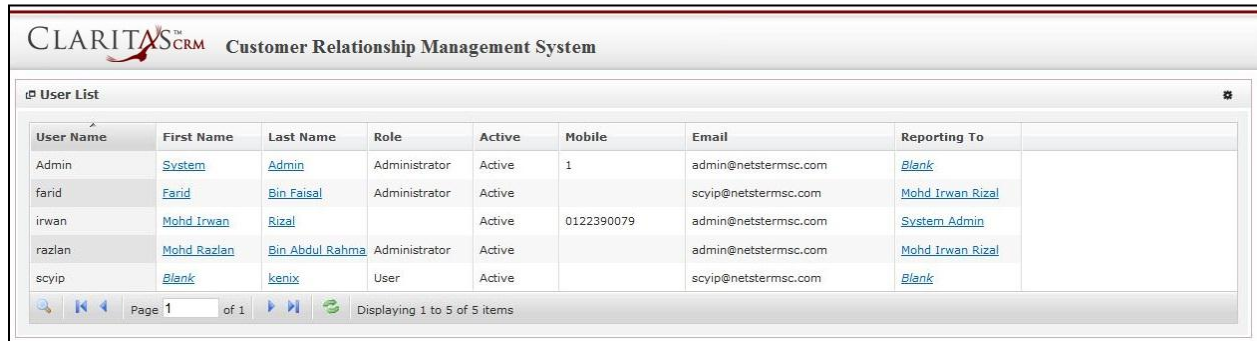
Figure 3.28: Start Date Time

- **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:
  - 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)



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

Figure 3.30: 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	<a href="#">New Meeting</a>	Not Held	<a href="#">kenix</a>	 Remove
 Call	08/19/2011 12:04 PM	<a href="#">New Call</a>	Planned	<a href="#">kenix</a>	 Remove

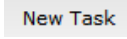
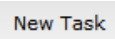


Figure 3.31: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click  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  button to **confirm**.

Clicking  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  menu at **Activities** subpanel. Once  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  button to create the New Task. Or click  menu to cancel creating New Task.

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

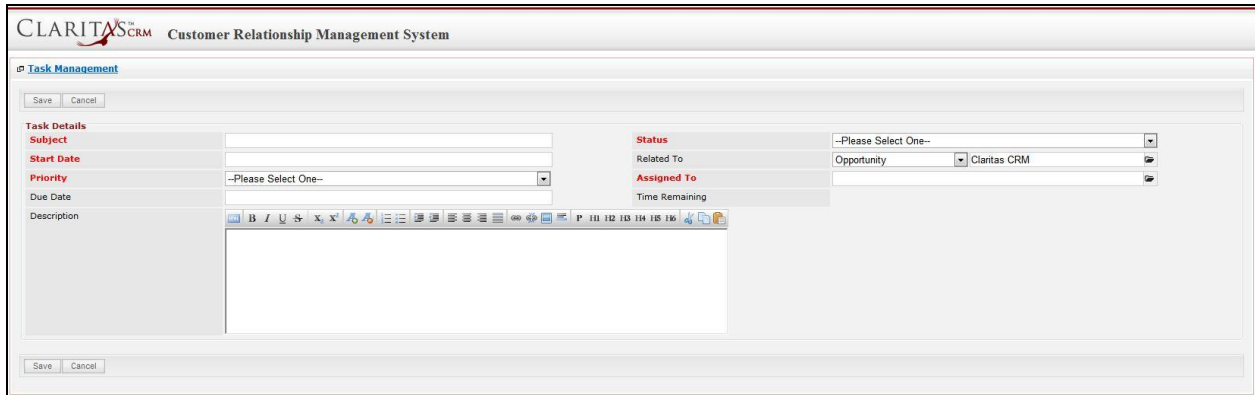


Figure 3.32: New Task Management Popup

- 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.

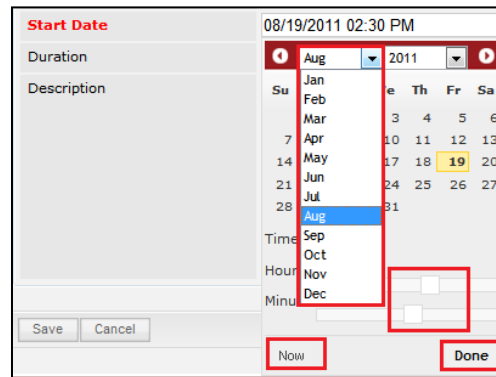


Figure 3.33: Start Date Time


- **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)

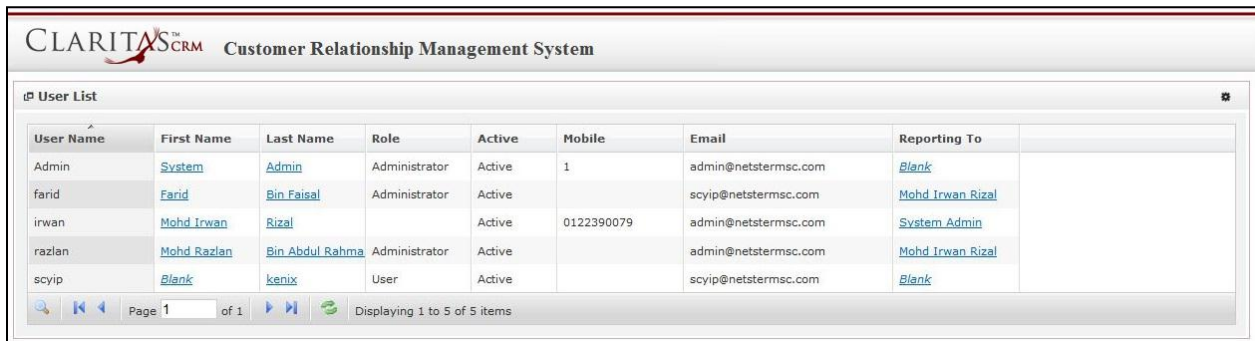




Figure 3.35: Assigned To Popup

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



Figure 3.36: Activities Subpanel List New Task

To **cancel creating New Task**, click  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  button to **confirm**.

Clicking  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.

Module	Date	Subject	Attachment	Remove
Note	08/19/2011 03:23 PM	New Note		Remove

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  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  menu at **Direct Reports List** subpanel. Once  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  button to create the New Contact.

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

The screenshot shows the 'Contact Management' window in the CLARITAS CRM system. The window title is 'CLARITAS CRM Customer Relationship Management System'. The main content area is titled 'Contact Management' and contains a form with the following sections:

- Contact Details:** Includes fields for Picture (with a 'Browse...' button), Salutation (dropdown), First Name, Last Name (highlighted in red), Status (dropdown, set to 'Active'), Email, and Website.
- Business Information:** Includes Job Title, Department, Account (set to 'Netster MSC Sdn Bhd'), Source (dropdown), and Reporting To (dropdown).
- Correspondence Address:** Divided into 'Business' and 'Home' sections, each with fields for Address 1, Address 2, Address 3, City, Postcode, State, and Country (dropdown). There are also fields for Phone and Fax.
- Other Information:** Includes Occupation (dropdown), Date of Birth, Marital Status (dropdown), NRIC, and Gender (dropdown).
- Note:** A rich text editor area with a toolbar and a large text input field.

At the top and bottom of the form are 'Save' and 'Cancel' buttons.

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  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  button to **confirm**.

Clicking  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  menu. Once  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**.

First Name	Last Name	Title	Company	Branch	Home Phone	Mobile	Email	Updated By
<a href="#">Sook Chian</a>	<a href="#">Yip</a>	Software Tester	Netster MSC Sdn Bhd (Cyberjaya)			+60169342765		FTSB/acyip
<a href="#">Kelvin</a>	<a href="#">Leow</a>	COO	Netster MSC Sdn Bhd		+6078054186	+60187785567	kleow@netstermsc.com	FTSB/acyip
<a href="#">Robert</a>	<a href="#">Chong</a>		Netster MSC Sdn Bhd					FTSB/acyip
<a href="#">Gan</a>	<a href="#">Chin Kiat</a>	Software Developer	Netster MSC Sdn Bhd		0123456789	012345679	ckgan@netstermsc.com	FTSB/acyip
<a href="#">Ho Joo</a>	<a href="#">Tan</a>	Director	Netster MSC Sdn Bhd	Netster Head Office			hjtjan@netstermsc.com	ftsb/kleow
<a href="#">Brandon</a>	<a href="#">Chang</a>	CEO	Netster MSC Sdn Bhd		+6078054185	+60138809898	bcchang@netstermsc.com	FTSB/acyip

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.*

The screenshot shows the 'CLARITY CRM Customer Relationship Management System' interface. The 'Case Management' window is open, displaying a form with three main sections: 'Case Details', 'Customer Feedback Form', and 'Case Resolution'. The 'Case Details' section includes fields for Case, Type, Source, Account, Contact, Status, Assigned To, Priority, Due Date, and Time Remaining. The 'Customer Feedback Form' section includes fields for First Name, Last Name, Title, Company, Salutation, Home Phone, Mobile, and Email. The 'Case Resolution' section includes a Subject field and two text areas for Description and Resolution, each with a rich text editor toolbar. The form has 'Save' and 'Cancel' buttons at the top and bottom.

Figure 3.45: New Issue Management Popup

### 4) Case Details

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

The screenshot shows the 'Create Case - Case Details' form with the following data entered:

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 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.

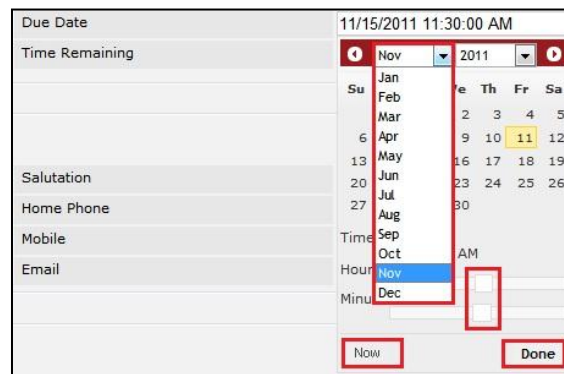


Figure 3.47: Due Date Time

- 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

Customer Feedback Form			
First Name	Mohd	Salutation	Mr
Last Name	Razlan	Home Phone	+60378054186
Title	Director	Mobile	+60175564132
Company	Razlan & Friend Associates	Email	razlan@netstermsc.com

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.

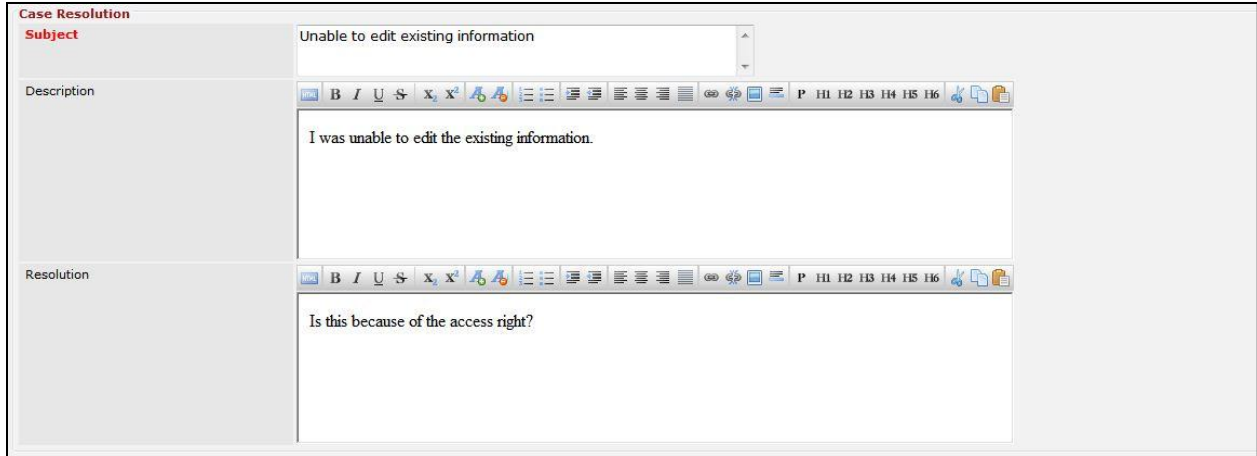


Figure 3.49: Create Contact – Case Resolution

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	<a href="#">CRD20111111-157</a>	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	<a href="#">CRD20111111-156</a>	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	<a href="#">CRD20111103-155</a>	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	<a href="#">CRD20111019-154</a>	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	<a href="#">CRD20111018-153</a>	Compliment	Email		Netster MSC Sdn Bhd (Kuala Lumpur)	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	<a href="#">CRD20110922-128</a>	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	<a href="#">CRD20110921-126</a>	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	<a href="#">CRD20110908-125</a>	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	<a href="#">CRD20110908-125a</a>	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	<a href="#">CRD20110728-116</a>	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	<a href="#">CRD20110627-70</a>	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	<a href="#">CRD20110613-27</a>	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	<a href="#">CRD000021-21</a>	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	<a href="#">CRD000016-16</a>	Complaint	Other		Telesto Connet Pvt. Ltd.	High	07/08/2011 07:32:00 AM	-132 Day(s) 11 Hour(s)	Open - New	Kelvin Leow

Figure 3.50: Select Issue Popup



## Contact – Contracts Subpanel

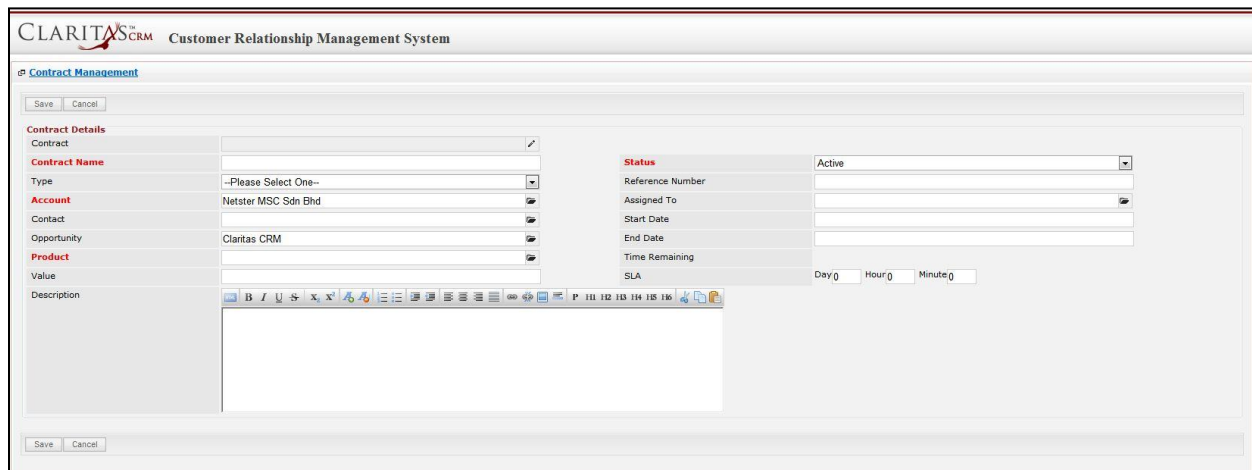
This subpanel contains any Contract related to the **Contact**.

### 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.*



The screenshot shows the 'New Contract Management Pop-up' window in the CLARITAS CRM system. The window title is 'Contract Management'. It features a 'Save' and 'Cancel' button at the top left. The form is divided into two main sections. The left section, titled 'Contract Details', includes fields for 'Contract Name' (highlighted in red), 'Type' (dropdown menu), 'Account' (text field with 'Netster MSC Sdn Bhd'), 'Contact' (dropdown menu), 'Opportunity' (dropdown menu with 'Claritas CRM'), 'Product' (dropdown menu, highlighted in red), 'Value' (text field), and 'Description' (text area). The right section, titled 'Status', includes a 'Status' dropdown menu (set to 'Active', highlighted in red), 'Reference Number' (text field), 'Assigned To' (dropdown menu), 'Start Date' (text field), 'End Date' (text field), 'Time Remaining' (text field), and 'SLA' (text field with 'Day: 0', 'Hour: 0', 'Minute: 0'). A 'Save' and 'Cancel' button is also located at the bottom left of the form.

Figure 3.51: New Contract Management Pop-up


- 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**

<b>Product</b>	wo
Value	Workflow Product

Figure 3.52: Product Field Auto Complete Dropdown

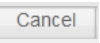

- iv. Click at the  button to open a new popup containing the list of all Products. (Click at the Product Name hyperlink to select the product)




Purchase Date	Product	Product Name	Account	Value (\$)	Status	Assigned To
10/13/2011	PROD20111013-10	<a href="#">Workflow Product</a>	Netster MSC Sdn Bhd	100.00	Active	Kenix Yip



Figure 3.53: Product Listing Popup

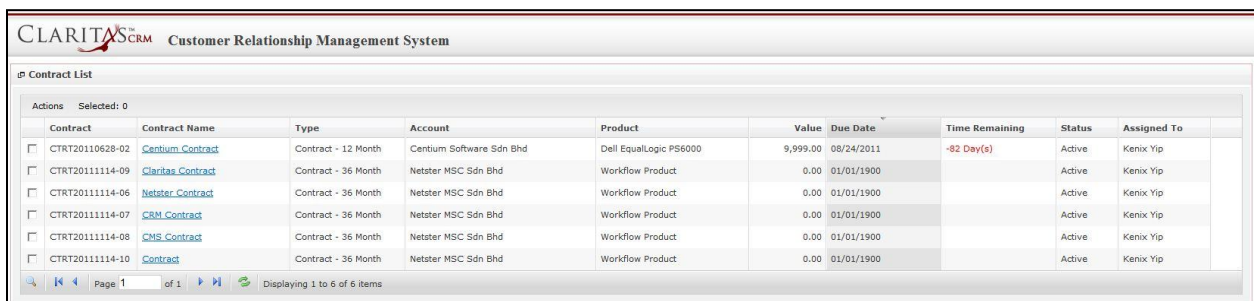
- **Status** field is the status of the Contract; the options for Status are: **Active** and **Inactive**.

To **cancel creating New Contract**, click  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  button to **confirm**.

Clicking  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  menu. Once  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
CTR720110628-02	<a href="#">Centium Contract</a>	Contract - 12 Month	Centium Software Sdn Bhd	Dell EqualLogic PS6000	9,999.00	08/24/2011	-82 Day(s)	Active	Kenix Yip
CTR720111114-09	<a href="#">Claritas Contract</a>	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
CTR720111114-06	<a href="#">Netster Contract</a>	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
CTR720111114-07	<a href="#">CRM Contract</a>	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
CTR720111114-08	<a href="#">CMS Contract</a>	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip
CTR720111114-10	<a href="#">Contract</a>	Contract - 36 Month	Netster MSC Sdn Bhd	Workflow Product	0.00	01/01/1900		Active	Kenix Yip

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.*

The screenshot shows the 'Lead Management' window in the CLARITAS CRM system. The form is organized into several sections: 'Lead Details', 'Business Information', 'Correspondence Address', and 'Other Information'. The 'Lead Details' section includes fields for 'Picture', 'Salutation', 'First Name', 'Last Name' (highlighted in red), 'Status' (highlighted in red), 'Email', and 'Website'. The 'Business Information' section includes 'Job Title', 'Department', 'Source', and 'Account'. The 'Correspondence Address' section is divided into 'Business' and 'Home' addresses, each with fields for 'Address 1', 'Address 2', 'Address 3', 'City', 'Postcode', 'State', 'Country', 'Phone', and 'Fax'. The 'Other Information' section includes 'Occupation', 'Date Of Birth', 'Marital Status', 'NRIC', and 'Gender'. A 'Note' field with a rich text editor is located at the bottom. 'Save' and 'Cancel' buttons are visible at the top and bottom of the form.

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:
  - 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

- 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)

Company	Type	Industry	Country	Phone	Fax	Website	Updated By
<a href="#">Netster MSC Sdn Bhd</a>	Shareholder	Technology	Malaysia	+60378054185	+60378054184	http://www.netstermsc.com	FTSB/acyip
<a href="#">Netster MSC Sdn Bhd (Cyberjaya)</a>	Partner	Technology	Malaysia	+60355678892	+60355678893	http://www.netstermsc.com	FTSB/acyip
<a href="#">Netster MSC Sdn Bhd (Kuala Lumpur)</a>	Partner	Technology	Malaysia	+60377888080	+60377888081	http://www.netstermsc.com	FTSB/acyip

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.



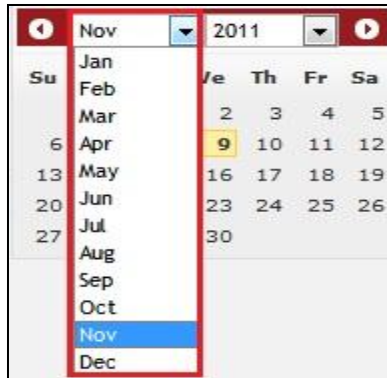


Figure 3.59: Expected Close Date

#### 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  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  button to **confirm**.

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

#### Select Opportunity

To select an **Opportunity** to this **Account**, click at the  menu. Once  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	<a href="#">Momma Corporation - CRM Soluti</a>	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	<a href="#">Momma Corporation - CRM Soluti</a>	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	<a href="#">Claritas CRM</a>	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	<a href="#">Momma Corporation - Momma Op</a>	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	<a href="#">Claritas CRM</a>		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	<a href="#">Netster CRM</a>		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	<a href="#">Momma Corporation - Momma Op</a>	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	<a href="#">Momma Corporation - Momma Op</a>	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	<a href="#">Momma Corporation - Momma Op</a>	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	<a href="#">aaa : Momma Opportunity</a>	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	<a href="#">aaa : Momma Opportunity</a>	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	<a href="#">opportunity AAA</a>	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	<a href="#">opportunity AAA</a>	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	<a href="#">Opportunity AAA</a>	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	<a href="#">Opportunity AAA</a>	Big Momma 2	Momma Corporation	999.00	10/31/2011	-17 Day(s) 18 Hour(s)	Prospecting	10	

Page 1 of 2 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.*

**CLARITAS CRM** Customer Relationship Management System

**Quote Management**

Save Cancel

**Quote Details**

Quotation

**Title**

**Account** Netster MSC Sdn Bhd

Contact

Opportunity Claritas CRM

**Quotation Date** 11/09/2011

**Valid Until**

**Status** --Please Select One--

**Payment Terms** --Please Select One--

Assigned To

Reference Number 1

Validity Remaining

**Correspondence Address**

Copy From Account Copy From Contact

**Billing**

Address 1

Address 2

Address 3

City

Postcode

State

Country --Please Select One--

Phone

Fax

**Shipping**

Address 1

Address 2

Address 3

City

Postcode

State

Country --Please Select One--

Phone

Fax

**Other Information**

Note

Save Cancel

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.

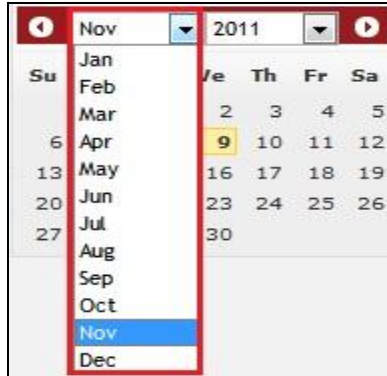


Figure 3.64: Valid Until

- **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.



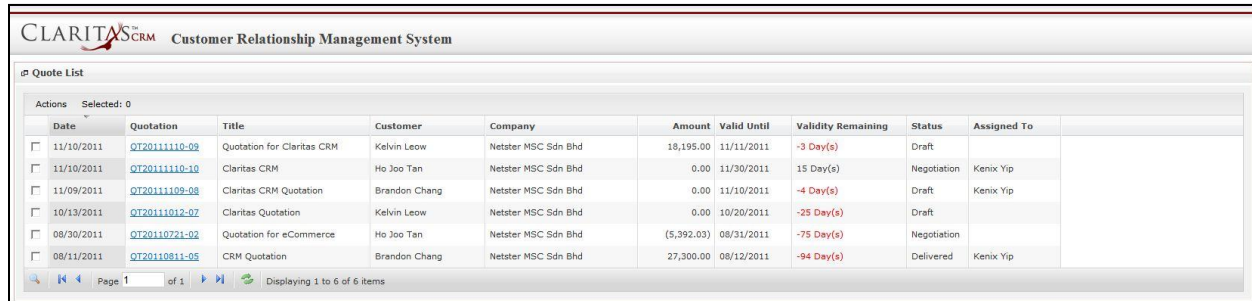
Figure 3.65: Quotes Subpanel List New Quote

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	<a href="#">QT20111110-03</a>	Quotation for Claritas CRM	Kelvin Leow	Netster MSC Sdn Bhd	18,195.00	11/11/2011	-3 Day(s)	Draft	
11/10/2011	<a href="#">QT20111110-10</a>	Claritas CRM	Ho Joo Tan	Netster MSC Sdn Bhd	0.00	11/30/2011	15 Day(s)	Negotiation	Kenix Yip
11/09/2011	<a href="#">QT20111109-08</a>	Claritas CRM Quotation	Brandon Chang	Netster MSC Sdn Bhd	0.00	11/10/2011	-4 Day(s)	Draft	Kenix Yip
10/13/2011	<a href="#">QT20111012-07</a>	Claritas Quotation	Kelvin Leow	Netster MSC Sdn Bhd	0.00	10/20/2011	-25 Day(s)	Draft	
08/30/2011	<a href="#">QT20110721-02</a>	Quotation for eCommerce	Ho Joo Tan	Netster MSC Sdn Bhd	(5,392.03)	08/31/2011	-75 Day(s)	Negotiation	
08/11/2011	<a href="#">QT20110811-05</a>	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 3.66: Select Quote Popup

## 4 Sales & Marketing - Campaign

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

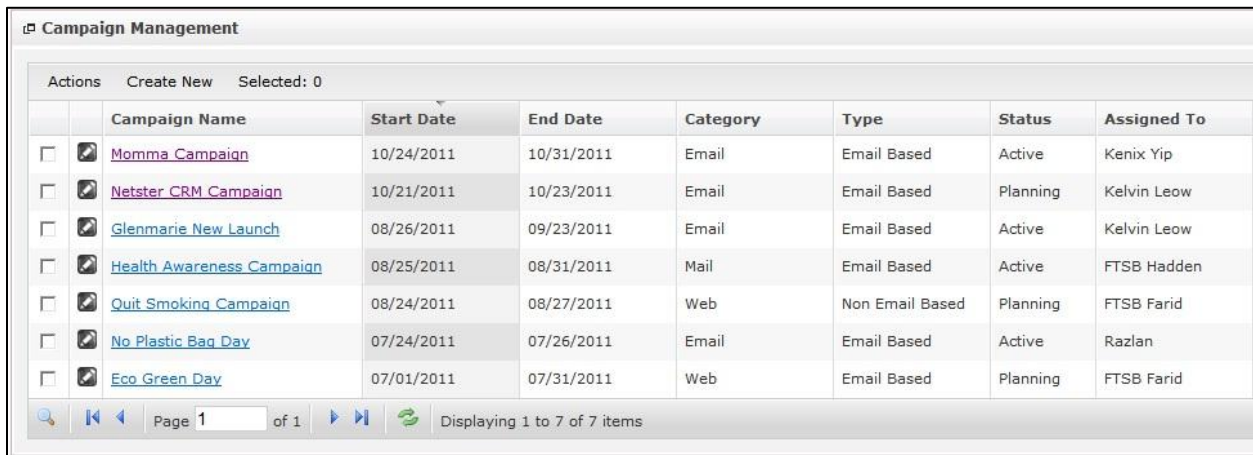
### Campaign Listing

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.



The screenshot shows the 'Campaign Management' page with a table listing campaigns. The table has columns for Campaign Name, Start Date, End Date, Category, Type, Status, and Assigned To. The first row is highlighted.

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

Figure 4.2: Campaign Listing

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



The screenshot shows the 'Campaign Management' page with the same table as Figure 4.2. The 'Momma Campaign' row is highlighted with a red box, indicating it is the selected item for viewing details.

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

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**.

The screenshot shows the 'Campaign Management Detail Page' for a campaign named 'Netster CRM Campaign'. It features several sections:

- Campaign Details:** Name: Netster CRM Campaign; Parent Campaign: [Glenmarie New Launch](#); Category: Email; Objective: To promote Claritas CRM; Remark: Claritas CRM launch day; Status: Planning; Type: Email Based; Assigned To: [Kelvin Leow](#).
- Campaign Planning:** Start Date: 10/21/2011; End Date: 10/23/2011; Budget: 0.00; Actual Cost: 0.00; Expected Cost: 0.00; Expected Revenue: 0.00; Expected Response (%):
- Campaign Statistics:** Total Targets: 0; Sent/Responded: 0; Total Viewed: 0; Total Clicked: 0; Total Bounced: 0; Total Opted Out: 0; Total Suppressed: 0.
- Campaign ROI:** Total Target: 3; Total Leads: 0; Total Contacts: 1; Total Users: 1; Converted Leads: 1; Total Opportunities: 0; Opportunity Amount (\$): 0.00; Converted Opportunities: 0; Won Opportunities (\$): 0.00.
- System Information:** Created Date: 10/20/2011 10:39:42 AM; Last Updated Date: 11/03/2011 11:19:17 AM; Created By: FTSB/vcfong; Last Updated By: FTSB/vcyp.

At the bottom, there is a 'Targets' section.

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.

The screenshot shows the 'Campaign Management' page with an 'Actions' menu. The 'Create New' button is highlighted with a red box. The text 'Selected: 0' is visible next to the menu.

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**.

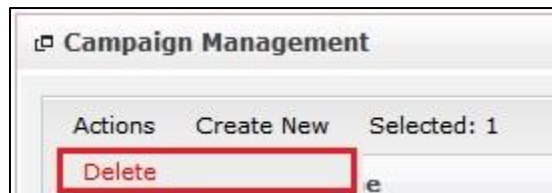


Figure 4.7: Action > Delete Menu

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)**.

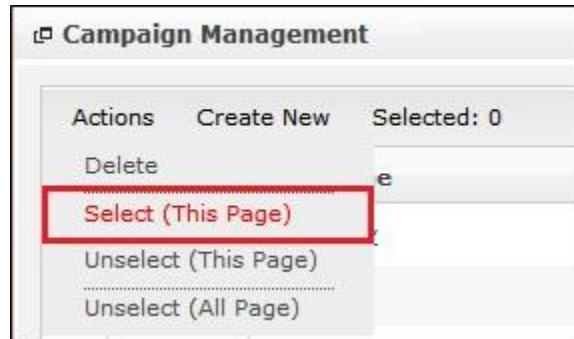


Figure 4.9: Actions > Select (This Page) Menu

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.

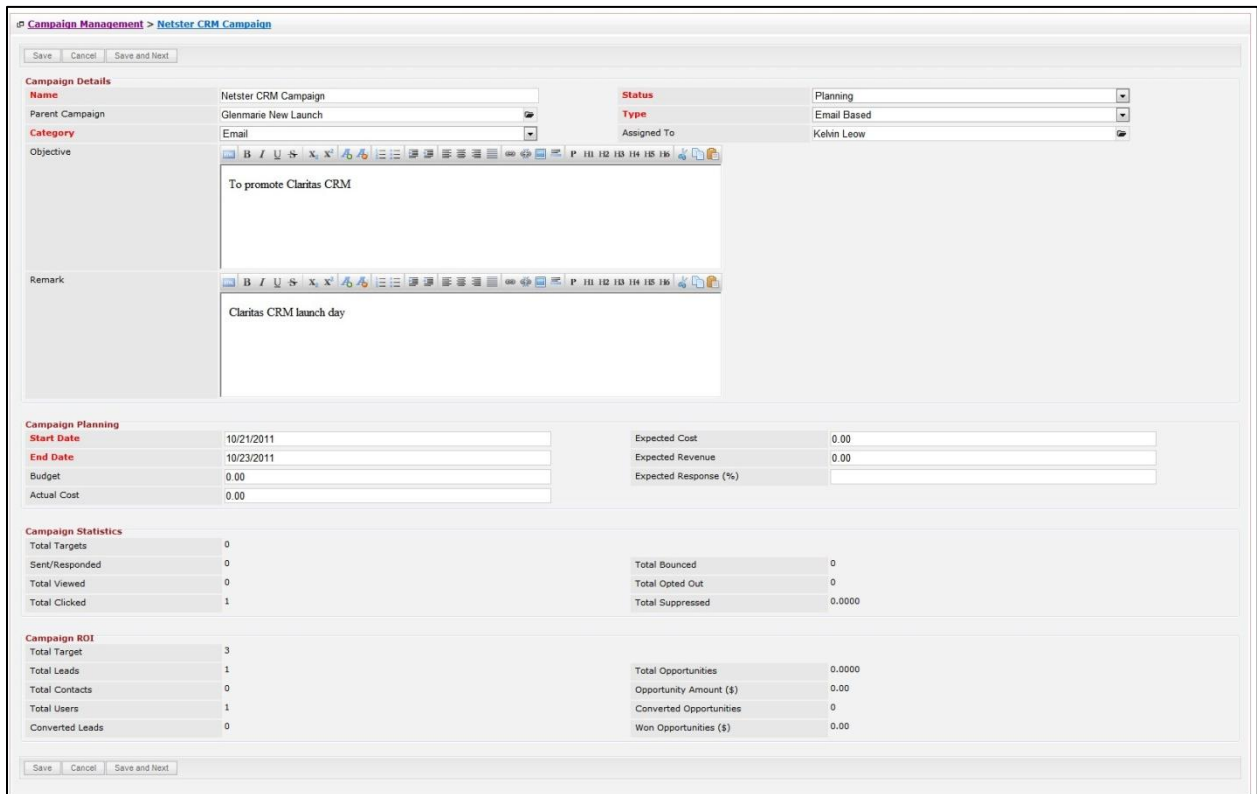
To refresh the listing page, click at the **Refresh**  button.

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  button to cancel editing and navigates back to the **Campaign Management Detail** page.

**Related Topics:** See [“Edit Campaign”](#)

## Create New Campaign

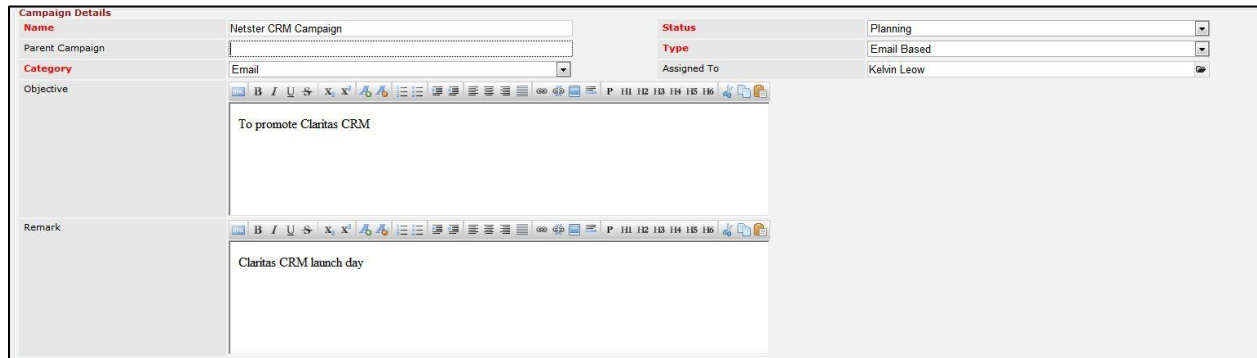
To create new campaign, click at the **Sales & Marketing > Campaign** menu at the Main Menu bar. Then click the  menu at the top of the **Campaign Listing**. After clicking Create New menu, page will navigate to **Campaign Management** page. Enter the relevant details and click  button to save the changes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

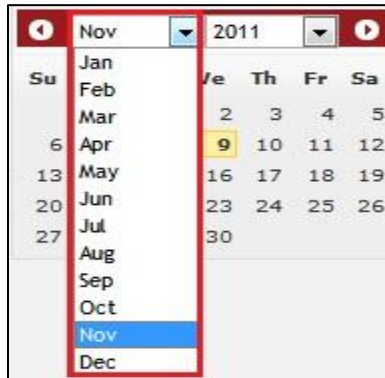


Figure 4.16: Start Date

- **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 Viewed	0
Total Clicked	0
Total Bounced	0
Total Opted Out	0
Total Suppressed	0


Figure 4.18: Create Campaign – Campaign Statistics

### 4) Campaign ROI






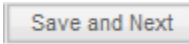
- All fields in this panel are non-editable.
- **Total Targets** indicates the total amount of targets of the campaign which includes Leads (Potential Customers), and Contact (Customers).
- **Total Leads** indicates the total amount of Leads (Potential Customers).
- **Total Contacts** indicates the total 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 Contacts	0
Total Users	0
Converted Leads	0
Total Opportunities	0
Opportunity Amount (\$)	0.00
Converted Opportunities	0
Won Opportunities (\$)	0.00

Figure 4.19: Create Campaign – Campaign ROI

To cancel creating New Campaign, click  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**

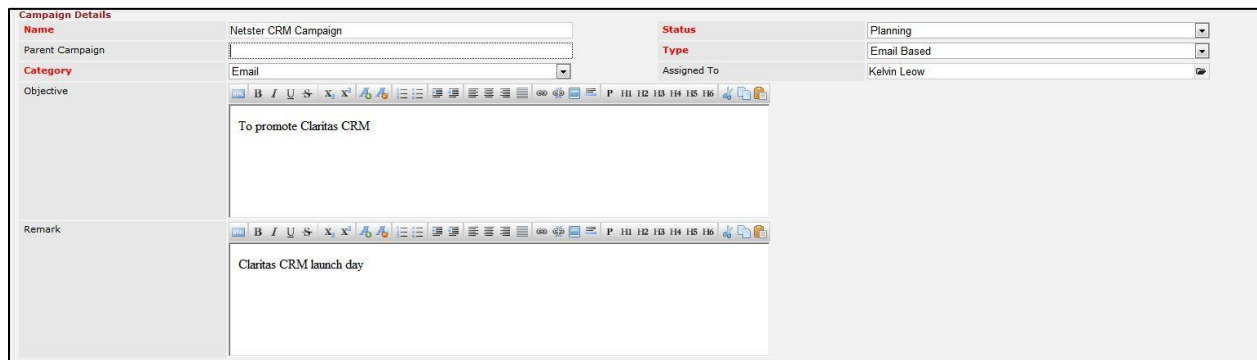


Figure 4.20: Edit Campaign - Campaign Details

- **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**

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 4.21: 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.

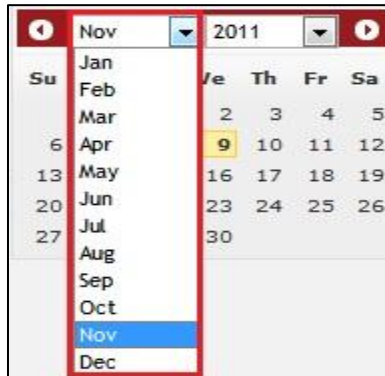


Figure 4.22: Start Date

- **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.

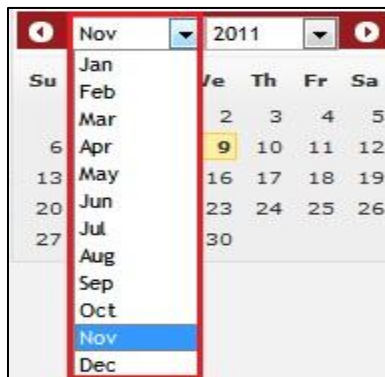


Figure 4.23: End Date

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

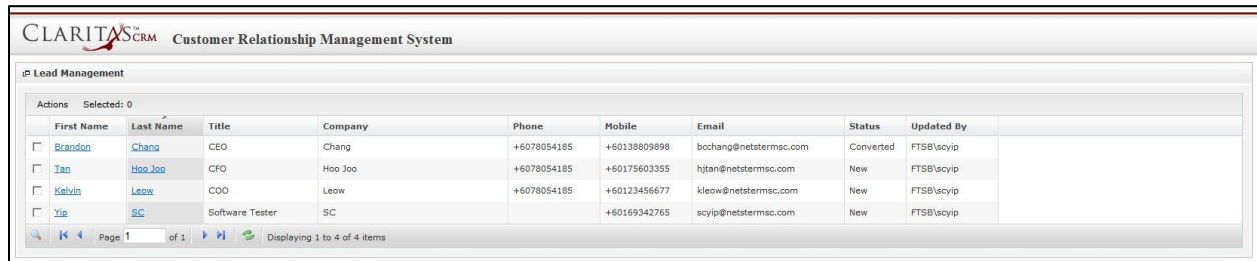


## Campaign – Targets Subpanel

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.



First Name	Last Name	Title	Company	Phone	Mobile	Email	Status	Updated By
<a href="#">Brandon</a>	<a href="#">Chang</a>	CEO	Chang	+6078054185	+60138809898	bchang@netstermsc.com	Converted	FTSB\scyip
<a href="#">Tan</a>	<a href="#">Hoo Joo</a>	CFO	Hoo Joo	+6078054185	+60175603355	htan@netstermsc.com	New	FTSB\scyip
<a href="#">Kelvin</a>	<a href="#">Leow</a>	COO	Leow	+6078054185	+60123456677	kleow@netstermsc.com	New	FTSB\scyip
<a href="#">Yip</a>	<a href="#">SC</a>	Software Tester	SC		+60169342765	scyip@netstermsc.com	New	FTSB\scyip

Figure 4.24: Lead Listing Popup

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



Module	Lead Status	First Name	Last Name	Company	Mobile	Email	Remove
<input checked="" type="checkbox"/> Lead	New	<a href="#">Yip</a>	<a href="#">SC</a>	Netster MSC Sdn Bhd		scyip@netstermsc.com	<input type="button" value="Remove"/>
<input checked="" type="checkbox"/> Contact		<a href="#">Seok Chian</a>	<a href="#">Yip</a>	Netster MSC Sdn Bhd (C)			<input type="button" value="Remove"/>
<input checked="" type="checkbox"/> User		<a href="#">Kenix</a>	<a href="#">Yip</a>		0169342765	scyip@netstermsc.com	<input type="button" value="Remove"/>

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.

First Name	Last Name	Title	Company	Branch	Home Phone	Mobile	Email	Updated By
<a href="#">Sook Chian</a>	<a href="#">Yip</a>	Software Tester	Netster MSC Sdn Bhd (Cyberjaya)			+60169342765		FTSB\scyip
<a href="#">Kelvin</a>	<a href="#">Leow</a>	COO	Netster MSC Sdn Bhd		+6078054186	+60187785567	kleow@netstermsc.com	FTSB\scyip
<a href="#">Robert</a>	<a href="#">Cheng</a>		Netster MSC Sdn Bhd					FTSB\scyip
<a href="#">Gan</a>	<a href="#">Chin Kiat</a>	Software Developer	Netster MSC Sdn Bhd		0123456789	0123456879	ckgan@netstermsc.com	FTSB\scyip
<a href="#">Brandon</a>	<a href="#">Chang</a>	CEO	Netster MSC Sdn Bhd		+6078054185	+60138809898	bochang@netstermsc.com	FTSB\scyip
<a href="#">Aaron</a>	<a href="#">Chong</a>		Pena Builders Sdn Bhd				aaron@sogokl.com.my	FTSB\scyip

Figure 4.26: Contact Listing Popup

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

Module	Lead Status	First Name	Last Name	Company	Mobile	Email	Remove
<input checked="" type="checkbox"/> Lead	New	<a href="#">Yip</a>	<a href="#">SC</a>	Netster MSC Sdn Bhd		scyip@netstermsc.com	Remove
<input checked="" type="checkbox"/> Contact		<a href="#">Sook Chian</a>	<a href="#">Yip</a>	Netster MSC Sdn Bhd (C)			Remove
<input checked="" type="checkbox"/> User		<a href="#">Kenix</a>	<a href="#">Yip</a>		0169342765	scyip@netstermsc.com	Remove

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.

User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	+60123335656	admin@netstermsc.com	System Technician
bochang	Brandon	Chang	Technician	Active	+60124896229	bochang@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	
yiwoo	Yew Lun	Woo	Administrator	Active	+60141100990	yiwoo@netstermsc.com	Kelvin Leow

Figure 4.28: User Listing Popup

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

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

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.

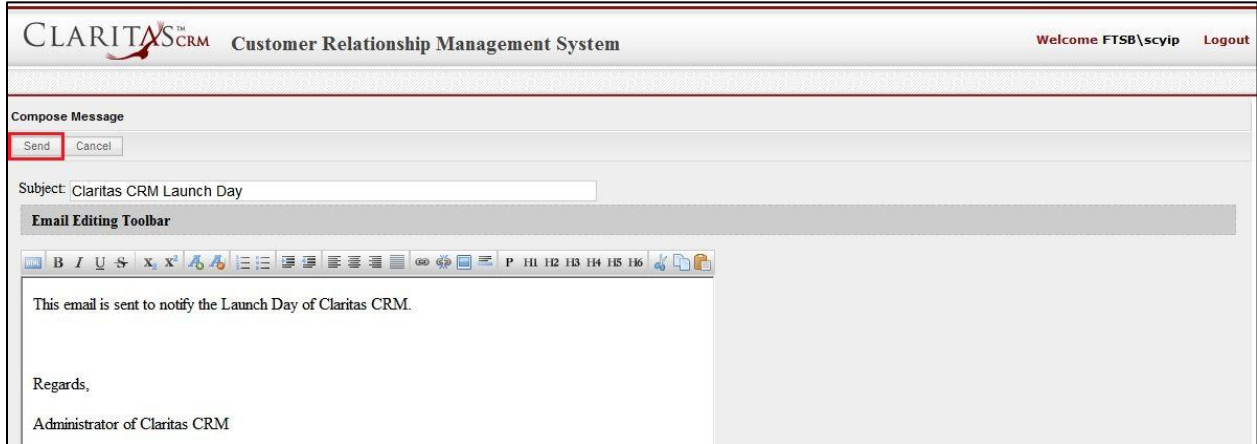


Figure 4.30: Compose Message Popup

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.

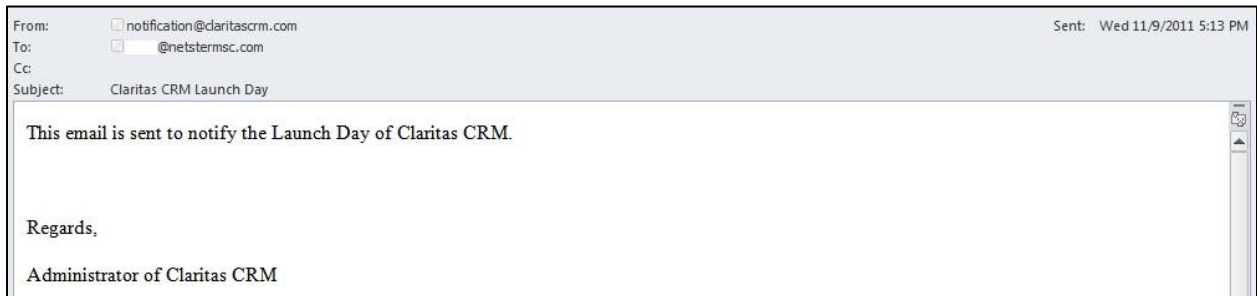


Figure 4.31: Target's Received Email

## 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.

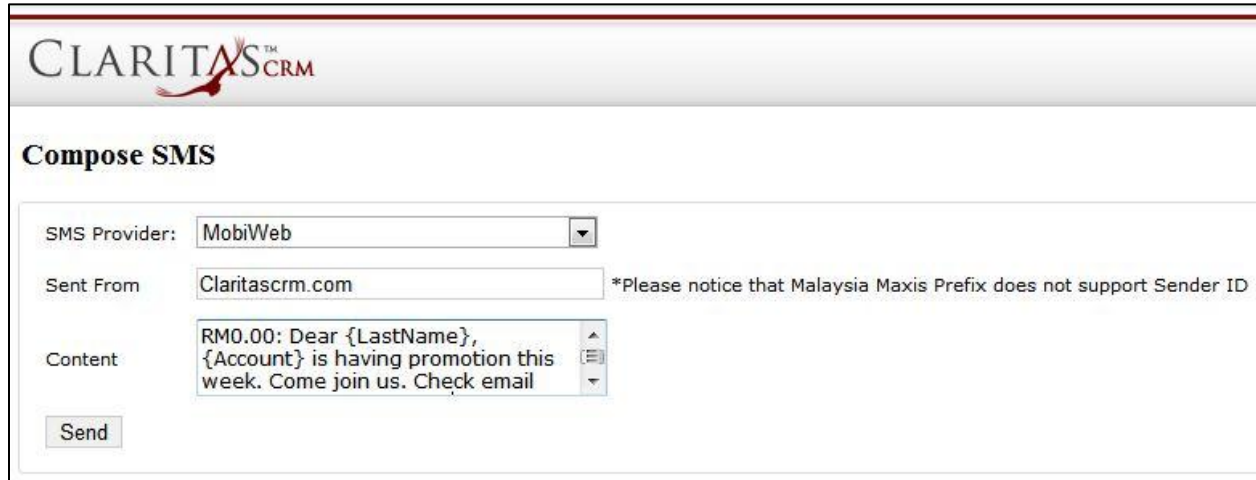


Figure 4.32: Compose SMS Popup

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.

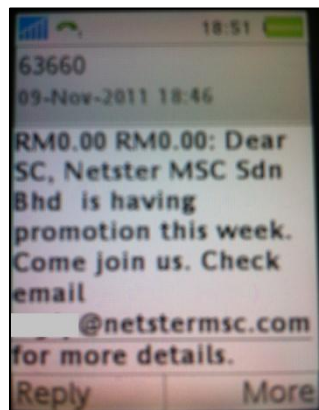


Figure 4.33: Target's Received SMS

## 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.

The screenshot shows the 'Lead Management' page with a table of leads. The table has columns for 'First Name', 'Last Name', 'Title', 'Company', 'Phone', 'Mobile', 'Email', 'Status', and 'Updated By'. The data rows are as follows:

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

Figure 5.2: Lead Listing

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

The screenshot shows the 'Lead Listing' page with the 'First Name' and 'Last Name' columns highlighted in red. The hyperlinks are underlined and colored. The data rows are as follows:

First Name	Last Name	Title	Company	Phone	Mobile
<a href="#">Brandon</a>	<a href="#">Chang</a>	CEO	Netster MSC Sdn Bhd	+6078054185	+60138809898
<a href="#">Tan</a>	<a href="#">Hoo Joo</a>	CFO	Netster MSC Sdn Bhd	+6078054185	+60175603355
<a href="#">Kelvin</a>	<a href="#">Leow</a>	COO	Netster MSC Sdn Bhd	+6078054185	+60123456677
<a href="#">Yip</a>	<a href="#">SC</a>	Software Tester	Netster MSC Sdn Bhd	+60169342765	

Figure 5.3: Lead First Name and Last Name Hyperlinks

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

**Lead Management > Brandon Chang**

Edit Cancel Copy New Refresh Convert Lead

**Lead Details**

Picture:

Salutation: Mr Status: New  
 First Name: Brandon Email: bochang@netstermsc.com  
 Last Name: Chang Website: http://www.netstermsc.com

**Business Information**

Job Title: CEO Source: Campaign  
 Department: Management Account: [Netster\\_MSC\\_Sdn\\_Bhd](#)

**Correspondence Address**

**Business**

Address 1: 246-246, Kelana Center Point  
 Address 2: 3, Jalan SS7/19  
 Address 3: Kelana Jaya  
 City: Petaling Jaya  
 Postcode: 47301  
 State: Selangor  
 Country: Malaysia  
 Phone: +6078054185  
 Fax: +6078054184

**Home**

Address 1: 246-246, Kelana Center Point  
 Address 2: 3, Jalan SS7/19  
 Address 3: Kelana Jaya  
 City: Petaling Jaya  
 Postcode: 47301  
 State: Selangor  
 Country: Malaysia  
 Phone: +6078054185  
 Mobile: +60138009898

**Other Information**

Occupation: Management NRIC: 781108555665  
 Date Of Birth: 11/08/1978 Gender: Male  
 Marital Status: Married  
 Note:

**System Information**

Created Date: 11/08/2011 03:27:12 PM Created By: FTSB\vcyip  
 Last Updated Date: 11/08/2011 03:40:48 PM Last Updated By: FTSB\vcyip  
 Converted Date:

Activities  
 History  
 Campaigns

Figure 5.4: Lead Management Detail Page

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

To refresh the page, click at the button.

To convert the Lead, click at the 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 menu at the top of the Lead Listing.

**Lead Management**

Actions Selected: 0

Figure 5.5: Create New Lead Menu

After clicking menu, page will navigate to **Lead Management** page. Enter the relevant details and click button to save the changes and navigates to **Lead Management Detail** page or click

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**.

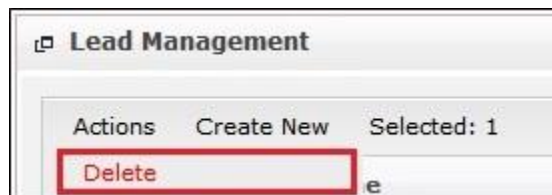


Figure 5.7: Action > Delete Menu

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)**.

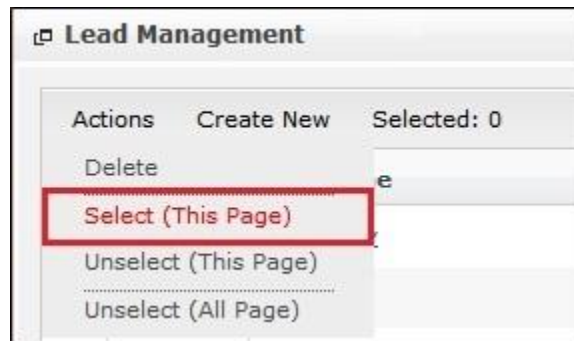


Figure 5.9: Actions > Select (This Page) Menu

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.

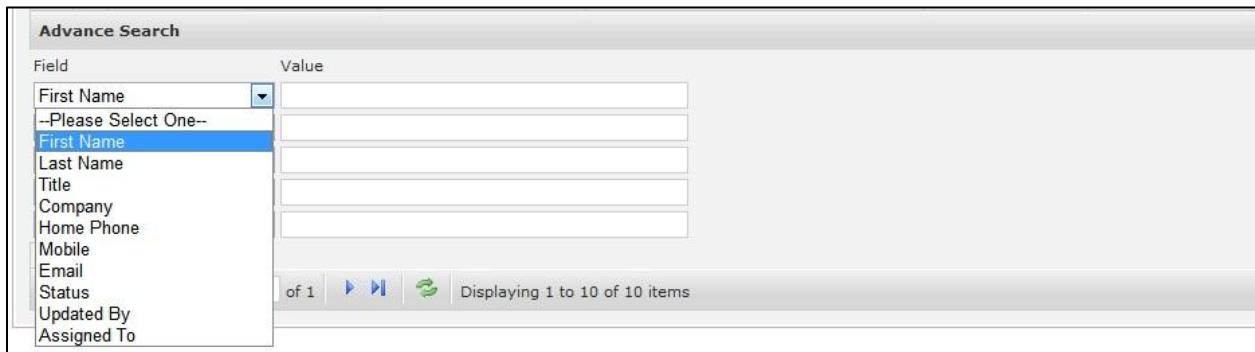




Figure 5.12: Lead Advance Search

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.

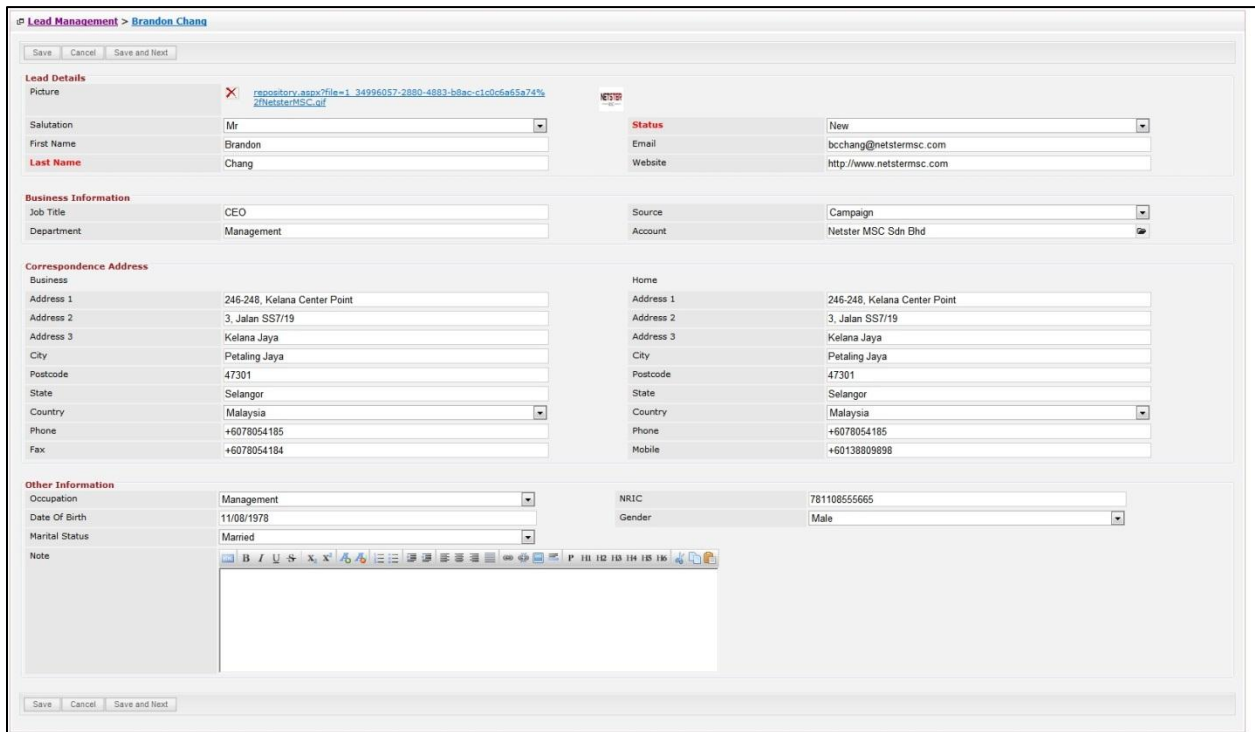


Figure 5.13: Lead Management Edit Page

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  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  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**

<b>Lead Details</b>	
Picture	<input type="text"/> Browse...
Salutation	--Please Select One--
First Name	Tan
<b>Last Name</b>	Hoo Joo
<b>Status</b>	New
Email	hjan@netstermsc.com
Website	http://www.netstermsc.com

**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

<b>Business Information</b>	
Job Title	CFO
Department	
Source	Conference
Account	Netster MSC Sdn Bhd

**Figure 5.15: Create Lead – Business Information**

### 3) Correspondence Address

- For user to enter the Correspondence Address of the Lead

Business		Home	
Address 1	246-248, Block A, Kelana Center Point	Address 1	246-248, Block A, Kelana Center Point
Address 2	No. 3, Jalan SS7/19, Kelana Jaya	Address 2	No. 3, Jalan SS7/19, Kelana Jaya
Address 3		Address 3	
City	Petaling Jaya	City	Petaling Jaya
Postcode	47301	Postcode	47301
State	Selangor	State	Selangor
Country	Malaysia	Country	Malaysia
Phone	+6078054185	Phone	
Fax	+6078054184	Mobile	+60175603355


Figure 5.16: Create Lead – Correspondence Address

### 4) Other Information

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


Occupation	--Please Select One--	NRIC	
Date Of Birth		Gender	--Please Select One--
Marital Status	--Please Select One--		
Note	<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"></div>		



Figure 5.17: Create Lead – Other Information

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

### Edit Lead

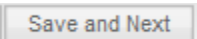
To edit lead details, click at the the **Sales & Marketing > Lead** menu at the Main Menu bar. Click at the

**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

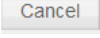
- For user to enter the Correspondence Address of the Lead

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  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.

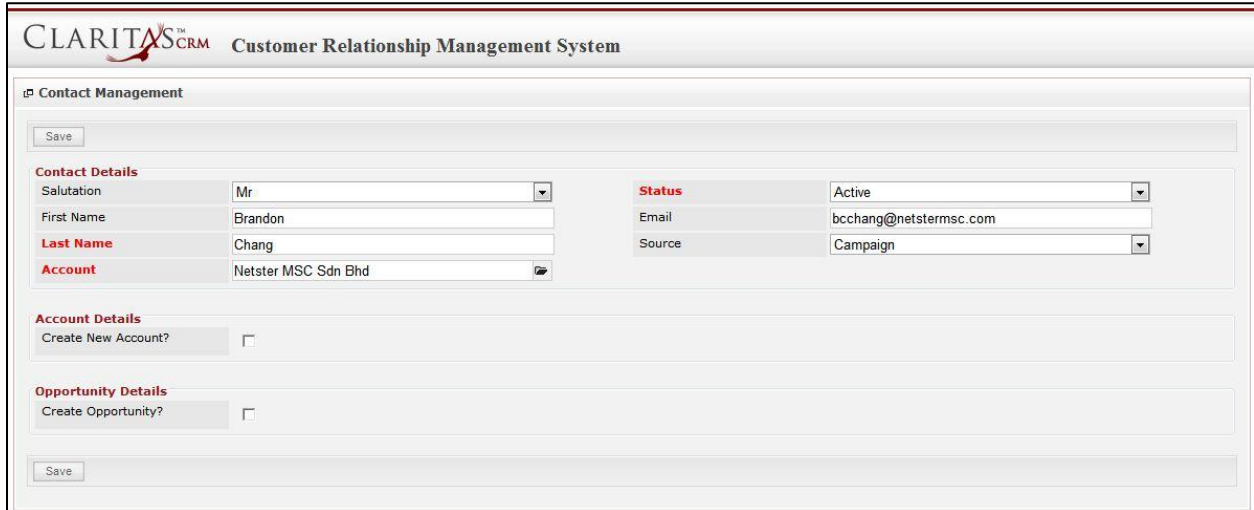


Figure 5.22: Convert Lead - Contact Management Popup

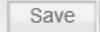
Edit the existing details of the Lead and click  button to save the changes and close the Contact Management popup window. Notice that the status of the Lead had changed.




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  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.

---

---

**Opportunity Details**  
Create Opportunity?

<b>Opportunity Name</b>	Netster MSC Sdn Bhd :	<b>Sales Status</b>	--Please Select One--
Type	--Please Select One--	<b>Probability (%)</b>	
Source	--Please Select One--	Assigned To	
Campaign		<b>Amount</b>	0
Next Step		<b>Expected Close Date</b>	

Figure 5.25: Opportunity Details Panel Expanded

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

Details of Converted Lead will be disabled except Status field.

The screenshot shows a CRM interface for a lead named Brandon Chang. The lead is in a 'Converted' status. The form is divided into several sections: Lead Details, Business Information, Correspondence Address, and Other Information. Most fields are disabled, indicated by a grey background and a lock icon. The 'Status' field is the only one that is active and shows 'Converted'. The 'Lead Details' section includes fields for Picture, Salutation (Mr), First Name (Brandon), Last Name (Chang), Status (Converted), Email (bcchang@netstermsc.com), and Website (http://www.netstermsc.com). The 'Business Information' section includes Job Title (CEO), Department (Management), Source (Campaign), and Account (Netster MSC Sdn Bhd). The 'Correspondence Address' section is split into Business and Home addresses, both with identical details: 246-248, Kelana Center Point, 3, Jalan SS7/19, Kelana Jaya, Petaling Jaya, 47301, Selangor, Malaysia. The 'Other Information' section includes Occupation (Management), Date Of Birth (11/08/1978), Marital Status (Married), NRIC (781108555665), and Gender (Male). A 'Note' field is present but empty. At the top of the form, there are buttons for 'Save', 'Cancel', and 'Save and Next'.

Section	Field	Value	Status
Lead Details	Picture	<a href="#">rspository.aspx?file=1_34996057-2880-4883-b8ac-cl0c6a65a74%2fNetsterMSC.gif</a>	Disabled
	Salutation	Mr	Disabled
	First Name	Brandon	Disabled
	Last Name	Chang	Disabled
	Status	Converted	Active
	Email	bcchang@netstermsc.com	Disabled
	Website	http://www.netstermsc.com	Disabled
Business Information	Job Title	CEO	Disabled
	Department	Management	Disabled
	Source	Campaign	Disabled
	Account	Netster MSC Sdn Bhd	Disabled
Correspondence Address	Business		
	Address 1	246-248, Kelana Center Point	Disabled
	Address 2	3, Jalan SS7/19	Disabled
	Address 3	Kelana Jaya	Disabled
	City	Petaling Jaya	Disabled
	Postcode	47301	Disabled
	State	Selangor	Disabled
	Country	Malaysia	Disabled
	Phone	+6078054185	Disabled
	Fax	+6078054184	Disabled
	Home		
	Address 1	246-248, Kelana Center Point	Disabled
	Address 2	3, Jalan SS7/19	Disabled
	Address 3	Kelana Jaya	Disabled
City	Petaling Jaya	Disabled	
Postcode	47301	Disabled	
State	Selangor	Disabled	
Country	Malaysia	Disabled	
Phone	+6078054185	Disabled	
Mobile	+60138809698	Disabled	
Other Information	Occupation	Management	Disabled
	Date Of Birth	11/08/1978	Disabled
	Marital Status	Married	Disabled
	NRIC	781108555665	Disabled
	Gender	Male	Disabled
Note		Disabled	

Figure 5.26: Converted Lead Details Disabled



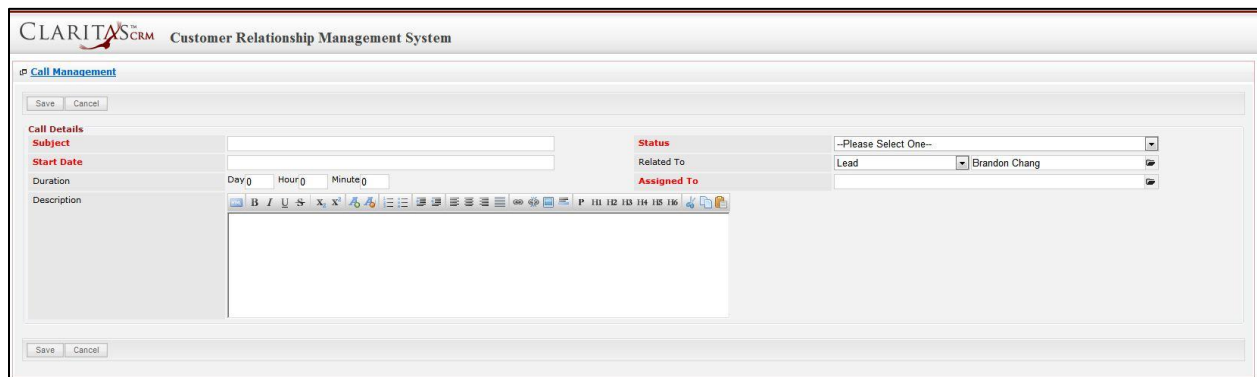
## Lead – Activities Subpanel

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.*



The screenshot shows the 'Call Management' window in the CLARITAS CRM system. The window has a title bar with the CLARITAS CRM logo and 'Customer Relationship Management System'. Below the title bar, there are 'Save' and 'Cancel' buttons. The main area is divided into two columns. The left column is titled 'Call Details' and contains fields for 'Subject', 'Start Date', 'Duration', and 'Description'. The 'Subject' field is highlighted in red. The 'Start Date' field is a date picker with 'Day 0', 'Hour 0', and 'Minute 0' dropdowns. The 'Duration' field has a text input and a 'Now' button. The 'Description' field is a rich text editor. The right column contains fields for 'Status', 'Related To', and 'Assigned To'. The 'Status' field is a dropdown menu with '--Please Select One--' selected. The 'Related To' field is a dropdown menu with 'Lead' selected. The 'Assigned To' field is a text input with 'Brandon Chang' entered. At the bottom of the window, there are 'Save' and 'Cancel' buttons.

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.

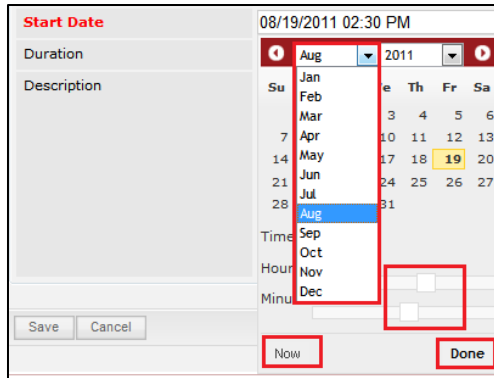


Figure 5.28: Start Date Time

- **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.

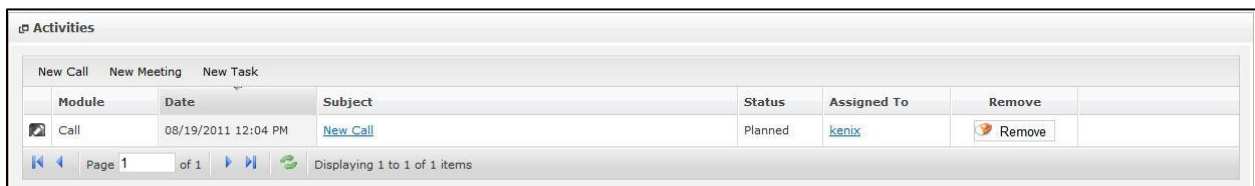


Figure 5.31: Activities Subpanel List New Call

To **cancel creating New Call**, click  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  button to **confirm**.

Clicking  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  menu at **Activities** subpanel. Once  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  button to create the New Meeting. Or click  menu to cancel creating New Meeting.

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

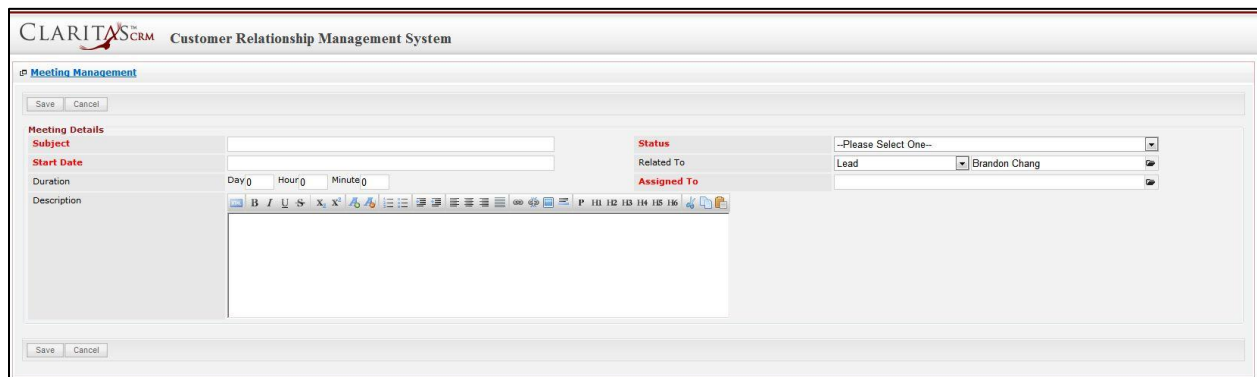


Figure 5.32: New Meeting Management Popup

- 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  menu to set the **current time** when the Meeting is created. Click at the  menu to set the date and time.

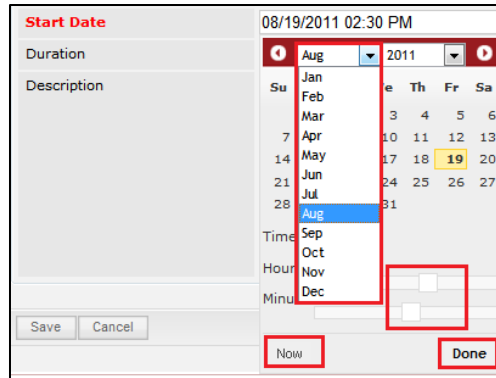



Figure 5.33: Start Date Time

- **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)

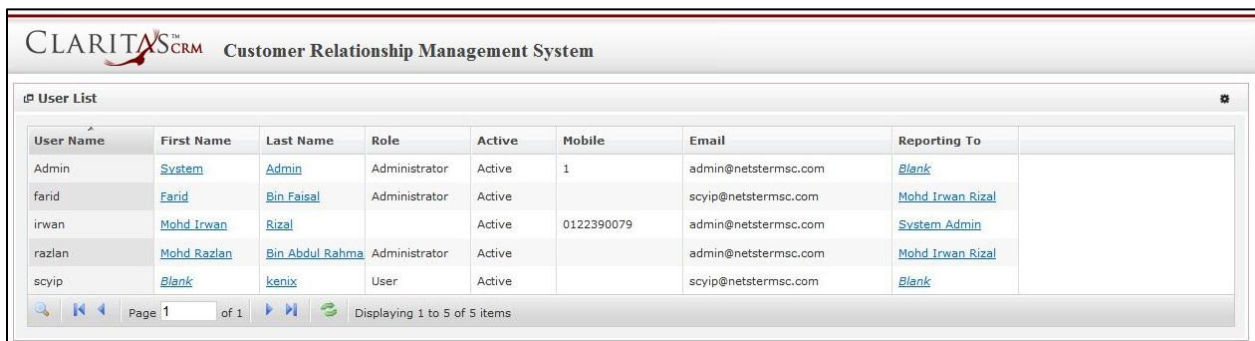


Figure 5.35: Assigned To Popup

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

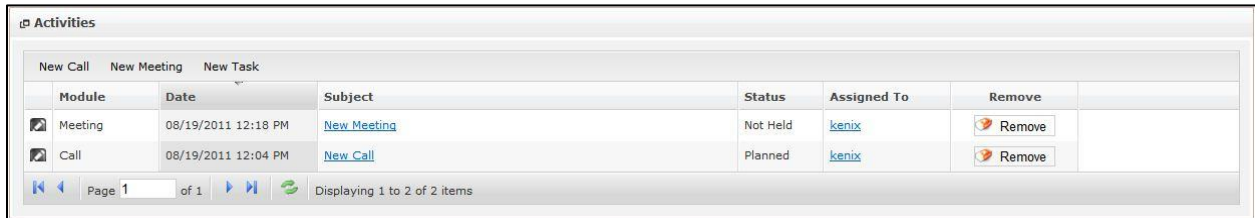


Figure 5.36: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click  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  button to **confirm**.

Clicking  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  menu at **Activities** subpanel. Once  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  button to create the New Task. Or click  menu to cancel creating New Task.

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

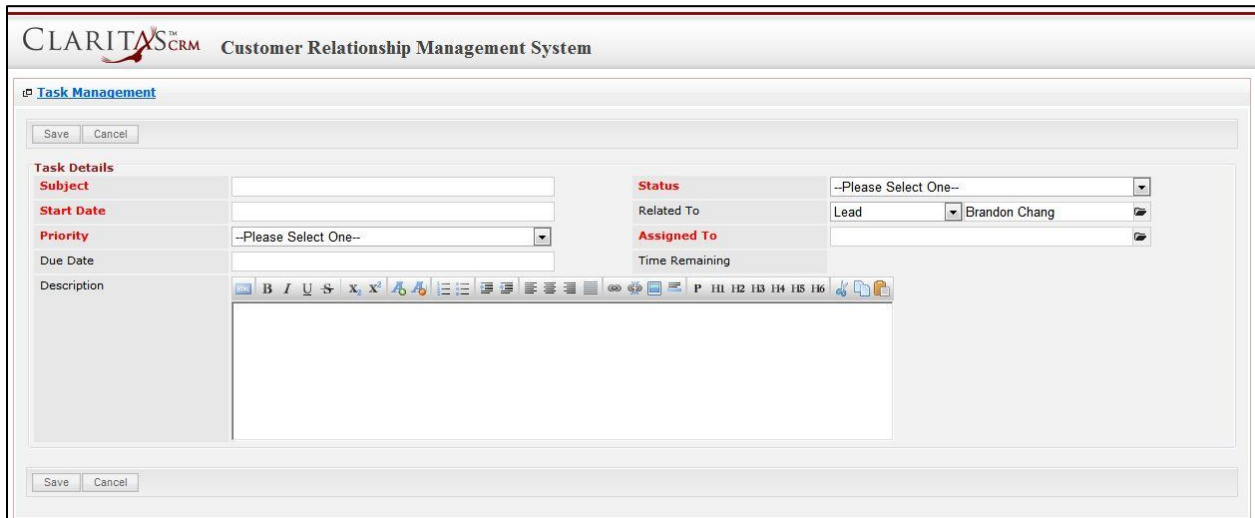


Figure 5.37: New Task Management Popup

- **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.

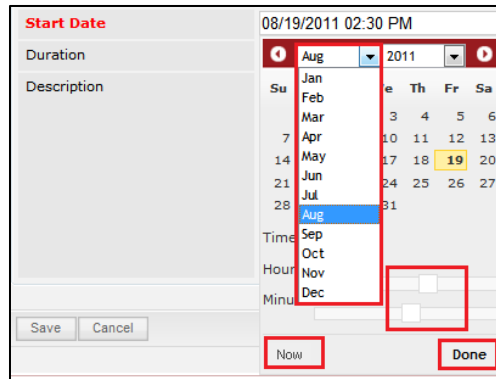


Figure 5.38: Start Date Time

- **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:

- 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**

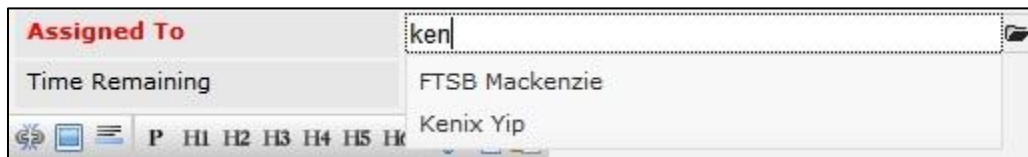



Figure 5.39: Assigned To Field Auto Complete Dropdown

- 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  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  button to **confirm**.

Clicking  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  menu at **History** subpanel. Once  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  button to create the New Note.

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

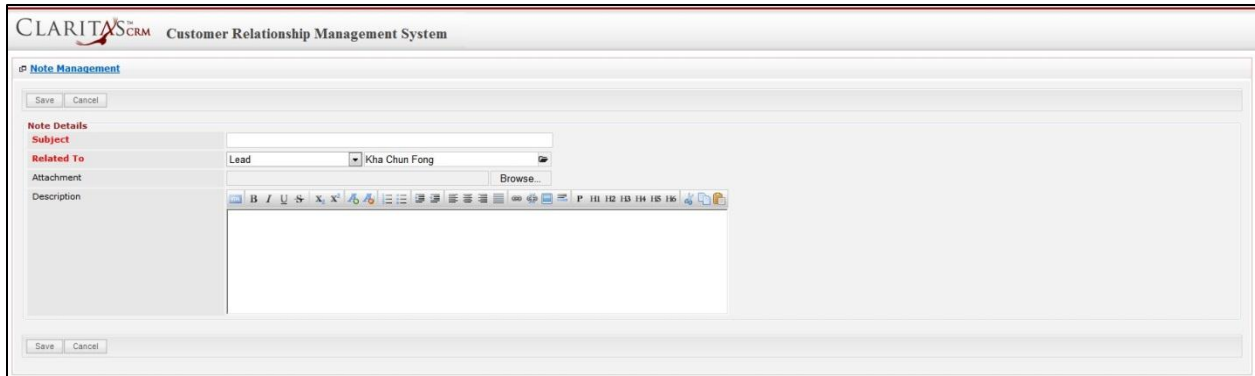


Figure 5.42: New Note Management Popup

- 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  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.

## 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.

Date	Name	Customer	Company	Amount	Expected Close Date	Time Remaining	Status	% Assigned To	Assigned To
10/18/2011 04:34:01 PM	<a href="#">Momma Corporation : Momma Opportunity</a>	big momma 13	Momma Corporation	600,000.00	10/31/2011	-14 Day(s) 17 Hour(s)	Negotiation/R	90	Kenix Yip
10/18/2011 04:05:29 PM	<a href="#">Claritas CRM</a>		Netster MSC Sdn Bhd	500,000.00	11/29/2011	14 Day(s) 6 Hour(s)	Proposal/Quo	75	Kenix Yip
08/11/2011 10:59:19 AM	<a href="#">oversea</a>		aa	100.00	08/31/2011	-75 Day(s) 17 Hour(s)	Closed Won	100	Kenix Yip

Figure 6.2: Opportunity Listing

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

Date	Name	Customer	Company	Amount
10/18/2011 04:34:01 PM	<a href="#">Momma Corporation : Momma Opportunity</a>	big momma 13	Momma Corporation	600,000.00
10/18/2011 04:05:29 PM	<a href="#">Claritas CRM</a>		Netster MSC Sdn Bhd	500,000.00
08/11/2011 10:59:19 AM	<a href="#">oversea</a>		aa	100.00

Figure 6.3: Name Hyperlink

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

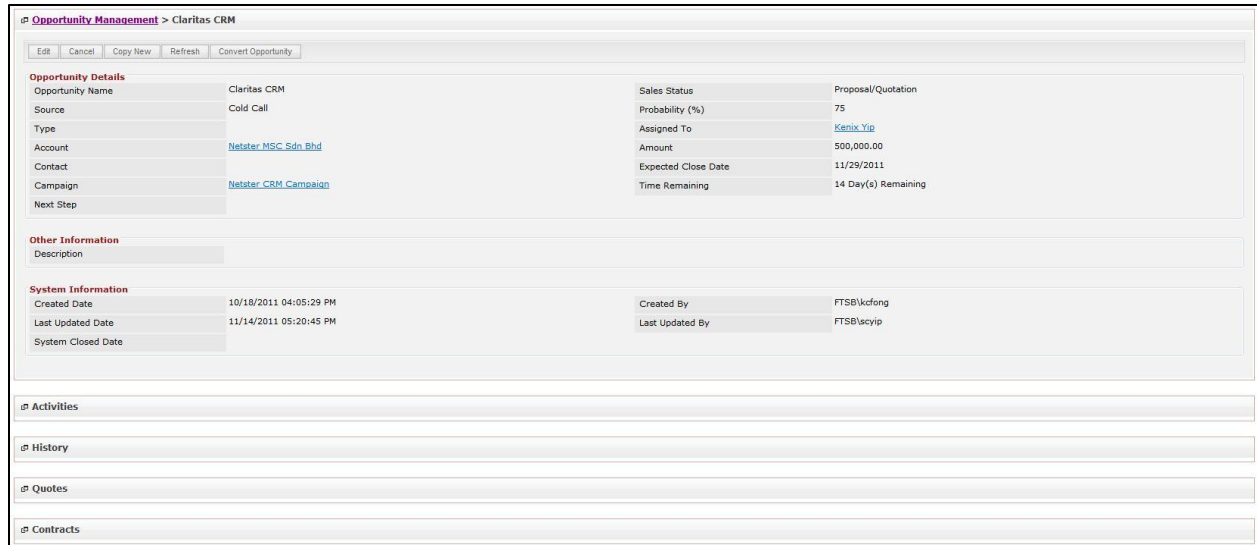
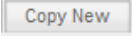
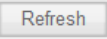
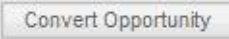


Figure 6.4: Opportunity Management Detail Page

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

To refresh the page, click at the  button.

To convert the Lead, click at the  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  menu at the top of the Opportunity Listing.

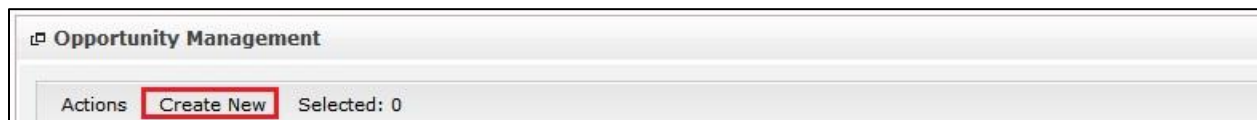





Figure 6.5: Create New Opportunity Menu

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

*Related Topics:* See [“Create New Opportunity”](#)

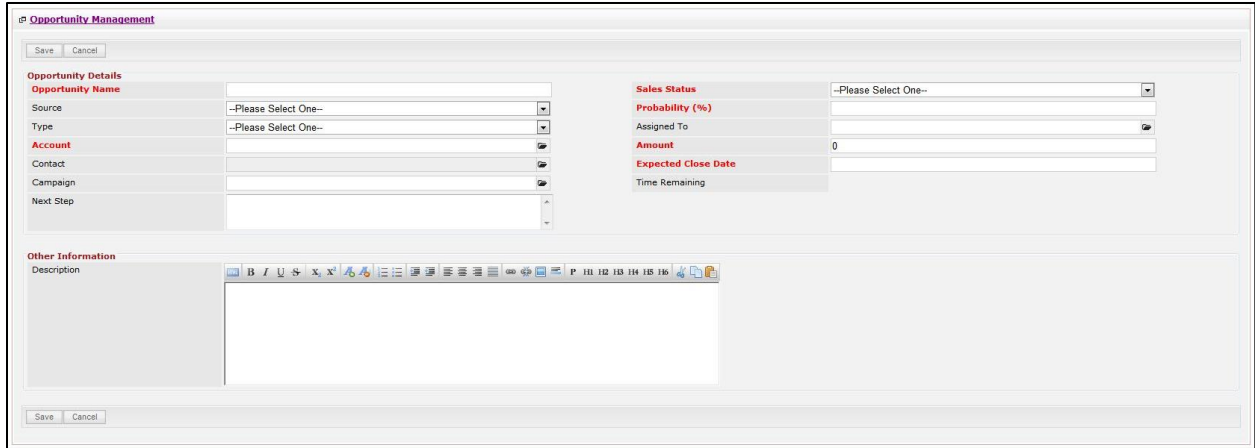


Figure 6.6: Opportunity Management Create New Page

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

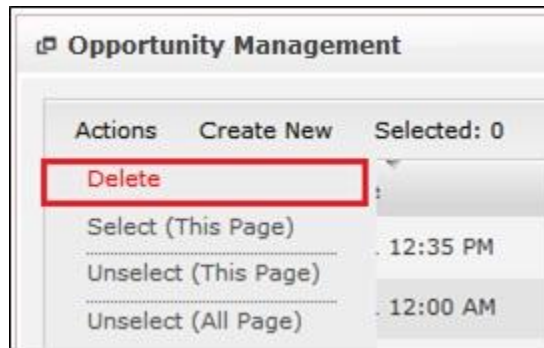


Figure 6.7: Action > Delete Menu

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)**.

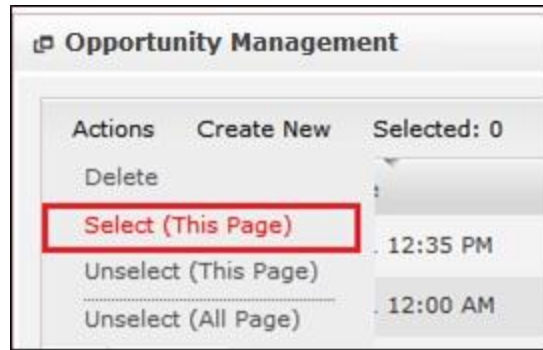


Figure 6.9: Actions > Select (This Page) Menu

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

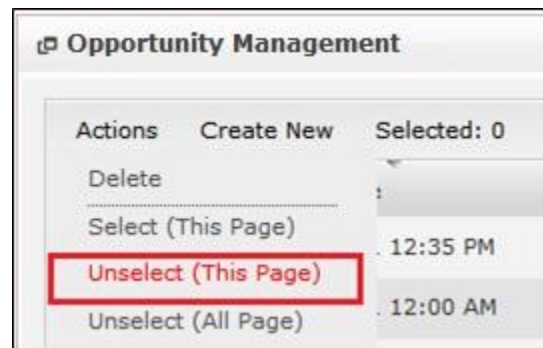


Figure 6.10: Actions > Unselect (This Page) Menu

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

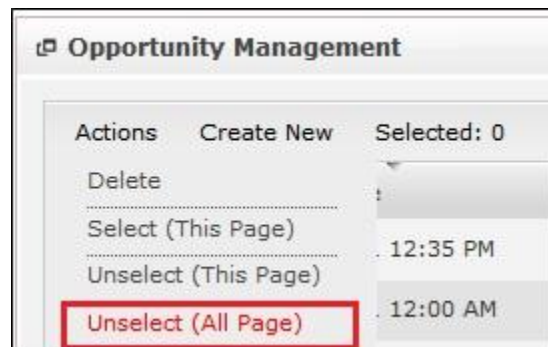






Figure 6.11: Actions > Unselect (All Pages) Menu

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.

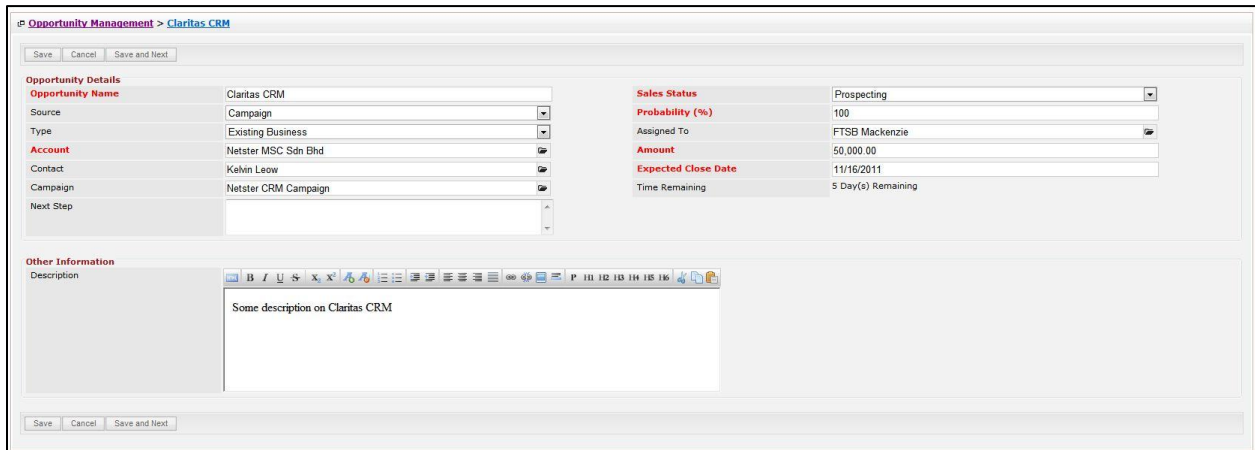


Figure 6.13: Opportunity Management Edit Page

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.

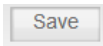
**Related Topics:** See [“Edit Opportunity”](#)

## 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



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:
  - 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**

- 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)

Company	Type	Industry	Country	Phone	Fax	Website	Updated By
<a href="#">Netster MSC Sdn Bhd</a>	Shareholder	Technology	Malaysia	+60378054185	+60378054184	http://www.netstermsc.com	FTSB\scypj
<a href="#">Netster MSC Sdn Bhd (Cyberjaya)</a>	Partner	Technology	Malaysia	+60355678892	+60355678893	http://www.netstermsc.com	FTSB\scypj
<a href="#">Netster MSC Sdn Bhd (Kuala Lumpur)</a>	Partner	Technology	Malaysia	+60377888080	+60377888081	http://www.netstermsc.com	FTSB\scypj

**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.

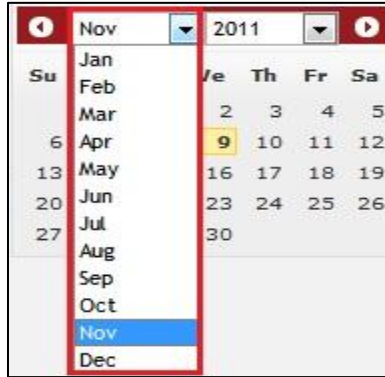


Figure 6.17: Expected Close Date

#### 9) Description

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

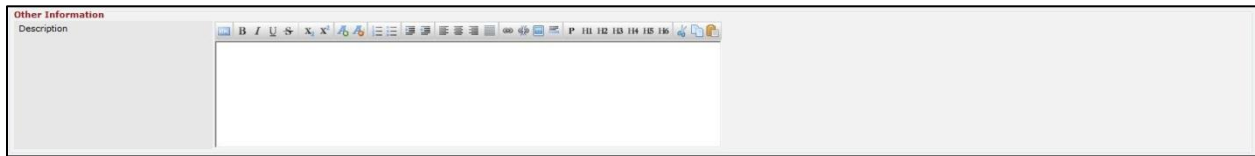


Figure 6.18: Create Opportunity - Other Information

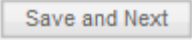
To **cancel creating New Opportunity**, click  button. Page will navigate back to **Opportunity Listing** page.

#### 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 Name hyperlink in **Opportunity Listing** page then click the  button in **Opportunity Management Detail** page. After clicking the **Edit**  button or  button, page will navigate to **Opportunity Management Edit** page. Edit the relevant details and click  button to save the changes and navigates back to **Opportunity**



Management Detail page or click  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.

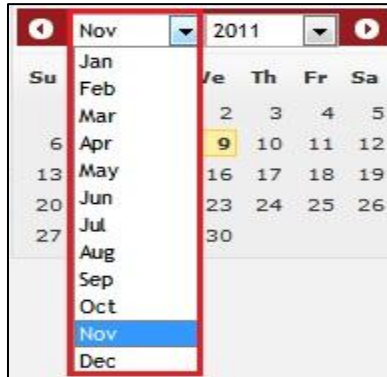


Figure 6.22: Expected Close Date

## 2) Description

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

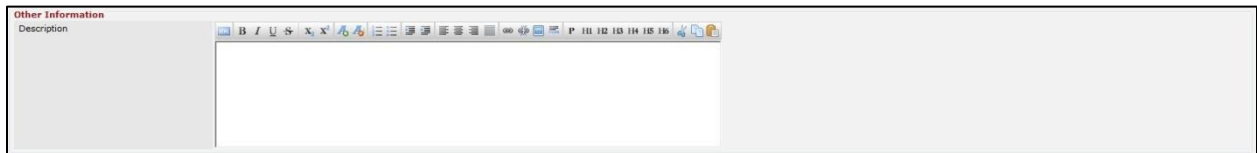


Figure 6.23: Edit Opportunity - Other Information

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.

**CLARITAS<sup>TM</sup> CRM** Customer Relationship Management System

Product Management

Save

**Product Details**

Purchase: PROD20111111-23

**Product Name**: Claritas CRM

**Account**: Netster MSC Sdn Bhd

Contact: Kelvin Leow

Value (\$): 50,000.00

Purchase Date: 11/11/2011

Delivery Date: 11/11/2011

Status: Active

Source: Campaign

Serial Number:

Asset Number:


Assigned To: FTSB Mackenzie

Quantity:

Description:

Save

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.

**Opportunity Details**

Opportunity Name: Claritas CRM

Source: Campaign

Type: Existing Business

Account: [Netster MSC Sdn Bhd](#)

Contact: [Kelvin Leow](#)

Campaign: [Netster CRM Campaign](#)

Next Step:

**Sales Status**: Closed Won

Probability (%): 100

Assigned To: [FTSB Mackenzie](#)

Amount: 50,000.00

Expected Close Date: 11/16/2011

Time Remaining: 4 Day(s) Remaining

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

Details of Converted Opportunity will be disabled except Status field.

Opportunity Management > Claritas CRM

Save Cancel Save and Next

**Opportunity Details**

**Opportunity Name**: Claritas CRM

Source: Campaign

Type: Existing Business

**Account**: Netster MSC Sdn Bhd

Contact: Kelvin Leow

Campaign: Netster CRM Campaign

Next Step:

**Sales Status**: Closed Won

**Probability (%)**: 100

Assigned To: FTSB Mackenzie

**Amount**: 50,000.00

**Expected Close Date**: 11/16/2011

Time Remaining: 4 Day(s) Remaining

**Other Information**

Description: Some description on Claritas CRM

Save Cancel Save and Next

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.*

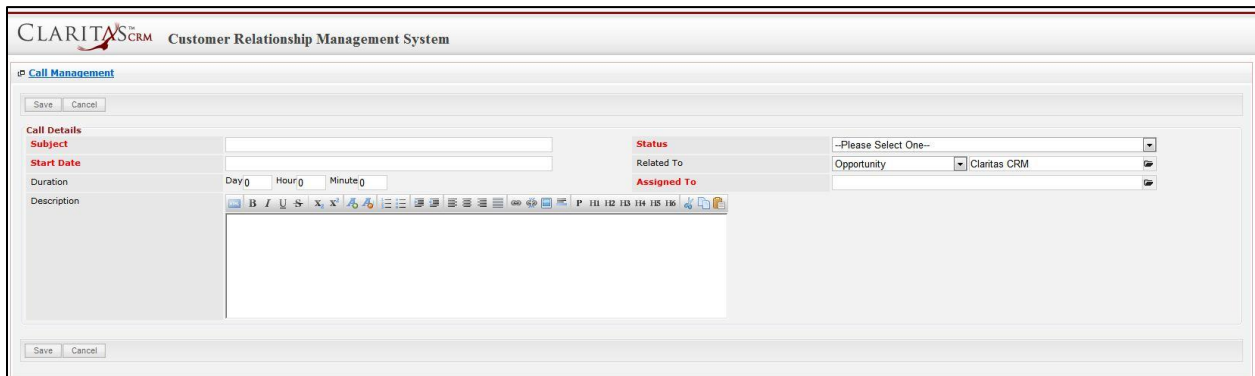


Figure 6.27: New Call Management Popup

- 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.

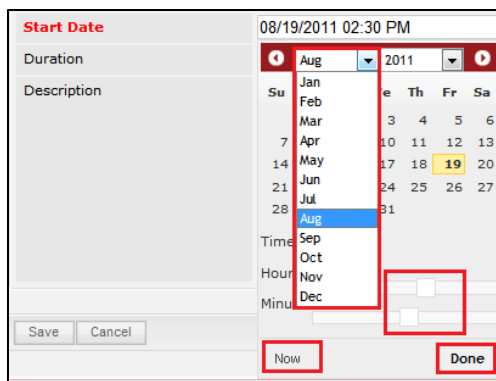


Figure 6.28: Start Date Time

- **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.

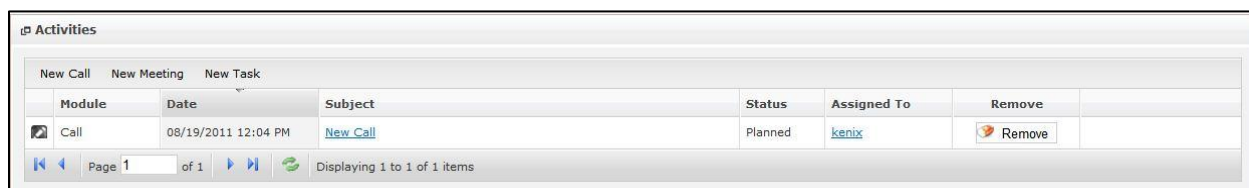


Figure 6.31: Activities Subpanel List New Call

To **cancel creating New Call**, click  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  button to **confirm**.

Clicking  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  menu at **Activities** subpanel.

Once  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  button to create the New Meeting. Or click  menu to cancel creating New Meeting.

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

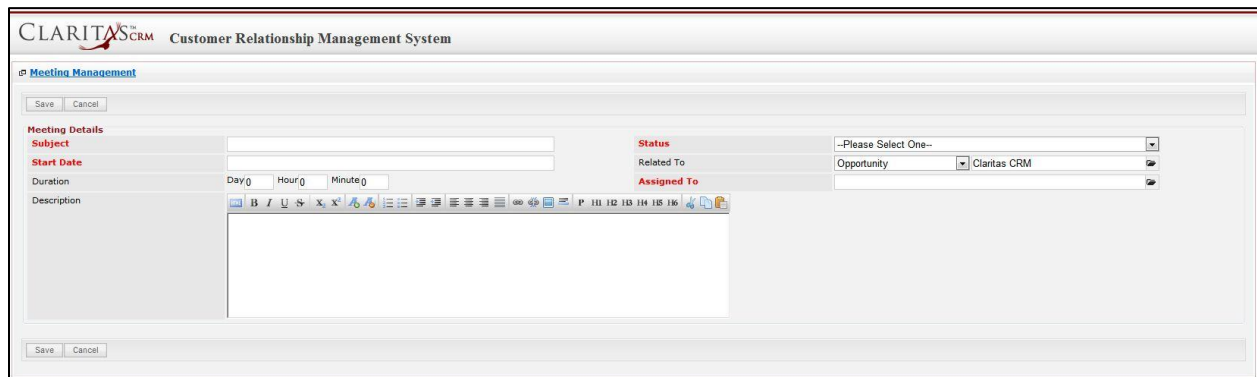
The screenshot shows the 'Meeting Management' window in the CLARITAS CRM system. The window title is 'Meeting Management' and it has 'Save' and 'Cancel' buttons at the top left. The main area is divided into several sections: 'Meeting Details' with a 'Subject' field (highlighted in red), a 'Start Date' field (highlighted in red) with a calendar icon, and a 'Duration' field with 'Day', 'Hour', and 'Minute' sub-fields. Below these is a rich text editor for 'Description'. To the right, there is a 'Status' dropdown menu (highlighted in red), a 'Related To' dropdown menu (highlighted in red) currently showing 'Opportunity', and an 'Assigned To' dropdown menu (highlighted in red) currently showing 'Claritas CRM'. At the bottom of the window, there are 'Save' and 'Cancel' buttons.

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  menu to set the **current time** when the Meeting is created. Click at the  menu to set the date and time.

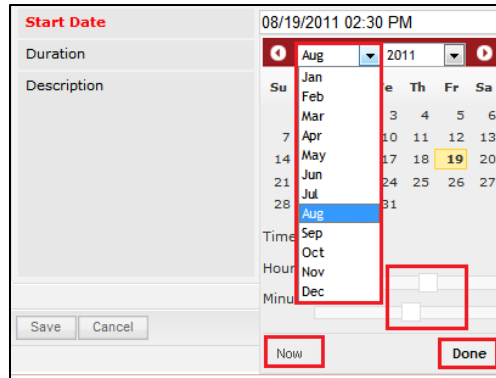


Figure 6.33: Start Date Time

- **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.

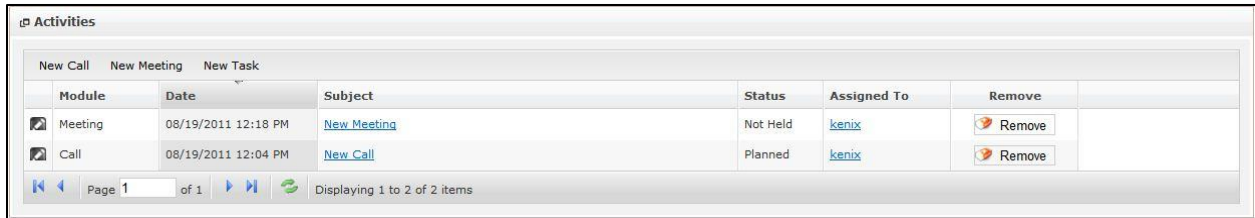


Figure 6.36: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click  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  button to **confirm**.

Clicking  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  menu at **Activities** subpanel.

Once  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  button to create the New Task. Or click  menu to cancel creating New Task.

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

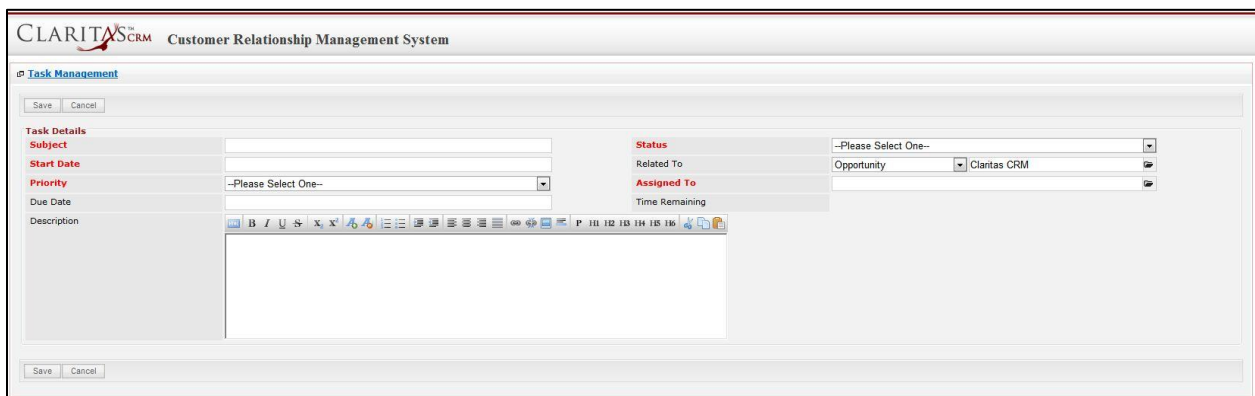


Figure 6.37: New Task Management Popup

- 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.

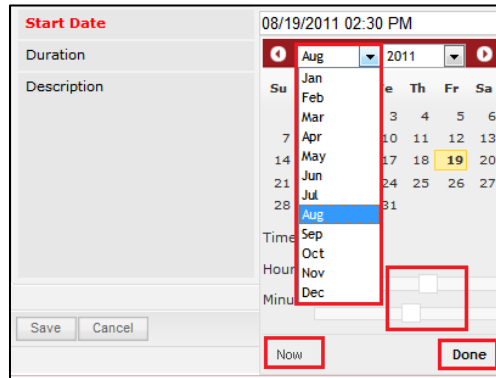


Figure 6.38: Start Date Time

- **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

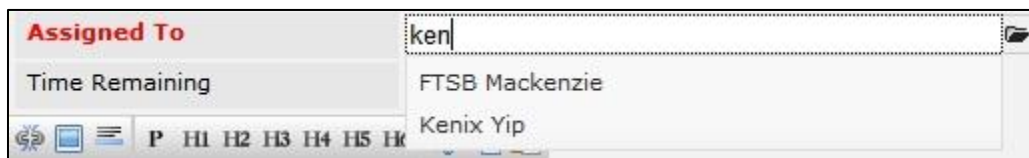



Figure 6.39: Assigned To Field Auto Complete Dropdown

- 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 <sup>SM</sup> CRM Customer Relationship Management System							
User List							
User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	<a href="#">System</a>	<a href="#">Admin</a>	Administrator	Active	1	admin@netstermsc.com	<a href="#">Blank</a>
farid	<a href="#">Farid</a>	<a href="#">Bin Faisal</a>	Administrator	Active		scyip@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
irwan	<a href="#">Mohd Irwan</a>	<a href="#">Rizal</a>		Active	0122390079	admin@netstermsc.com	<a href="#">System Admin</a>
razlan	<a href="#">Mohd Razlan</a>	<a href="#">Bin Abdul Rahma</a>	Administrator	Active		admin@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
scyip	<a href="#">Blank</a>	<a href="#">kenix</a>	User	Active		scyip@netstermsc.com	<a href="#">Blank</a>

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	<a href="#">New Task</a>	Not Held	<a href="#">kenix</a>	Remove	
	Meeting	08/19/2011 12:18 PM	<a href="#">New Meeting</a>	Not Held	<a href="#">kenix</a>	Remove	
	Call	08/19/2011 12:04 PM	<a href="#">New Call</a>	Planned	<a href="#">kenix</a>	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  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  button to **confirm**.

Clicking  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  menu at **History** subpanel. Once  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  button to create the New Note.

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

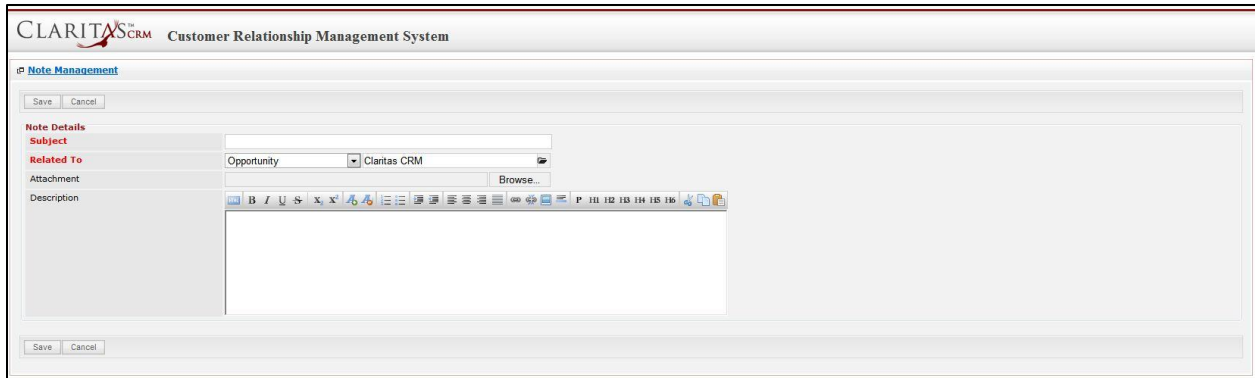


Figure 6.42: New Note Management Popup

- 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.*

The screenshot shows the 'Quote Management' popup window in the CLARITAS CRM system. The window is titled 'Quote Management' and has a 'Save' and 'Cancel' button at the top left. The main content area is divided into three sections:

- Quote Details:** This section contains several fields. 'Title' is a red field. 'Account' is populated with 'Netster MSC Sdn Bhd'. 'Contact' is a red field. 'Opportunity' is populated with 'Claritas CRM'. 'Quotation Date' is populated with '11/09/2011'. 'Valid Until' is a red field. To the right of these fields are 'Status' and 'Payment Terms' dropdown menus, both with '--Please Select One--' selected. Below these are 'Assigned To' and 'Reference Number 1' fields.
- Correspondence Address:** This section has two columns: 'Billing' and 'Shipping'. Each column has fields for 'Address 1', 'Address 2', 'Address 3', 'City', 'Postcode', 'State', and 'Country'. The 'Country' dropdowns are set to '--Please Select One--'. There are also 'Phone' and 'Fax' fields for each address type.
- Other Information:** This section has a 'Note' field with a rich text editor toolbar and a large text area.

At the bottom of the window, there are 'Save' and 'Cancel' buttons.

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.

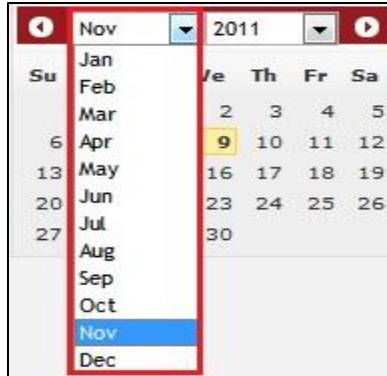


Figure 6.45: Quotation Date

- **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.

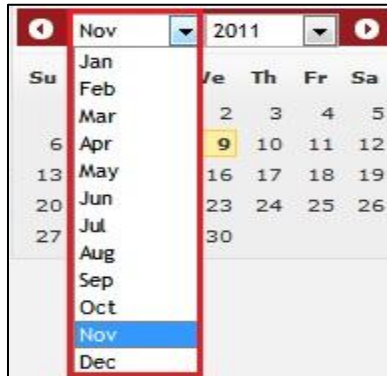


Figure 6.46: Valid Until

- **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  button or copy the address from the related Contact by clicking the  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.

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

Figure 6.47: Quotes Subpanel List New Quote

To **cancel creating New Quote**, click 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 button to **confirm**.

Clicking 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 menu. Once 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**.

Date	Quotation	Title	Customer	Company	Amount	Valid Until	Validity Remaining	Status	Assigned To
11/10/2011	<a href="#">QT20111110-09</a>	Quotation for Claritas CRM	Kelvin Leow	Netster MSC Sdn Bhd	18,195.00	11/11/2011	-3 Day(s)	Draft	
11/10/2011	<a href="#">QT20111110-10</a>	Claritas CRM	Ho Joo Tan	Netster MSC Sdn Bhd	0.00	11/30/2011	15 Day(s)	Negotiation	Kenix Yip
11/09/2011	<a href="#">QT20111109-08</a>	Claritas CRM Quotation	Brandon Chang	Netster MSC Sdn Bhd	0.00	11/10/2011	-4 Day(s)	Draft	Kenix Yip
10/13/2011	<a href="#">QT20111012-07</a>	Claritas Quotation	Kelvin Leow	Netster MSC Sdn Bhd	0.00	10/20/2011	-25 Day(s)	Draft	
08/30/2011	<a href="#">QT20110721-02</a>	Quotation for eCommerce	Ho Joo Tan	Netster MSC Sdn Bhd	(5,392.00)	08/31/2011	-75 Day(s)	Negotiation	
08/11/2011	<a href="#">QT20110811-05</a>	CRM Quotation	Brandon Chang	Netster MSC Sdn Bhd	27,300.00	08/12/2011	-94 Day(s)	Delivered	Kenix Yip

Figure 6.48: Select Quote Pop up

## 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.*

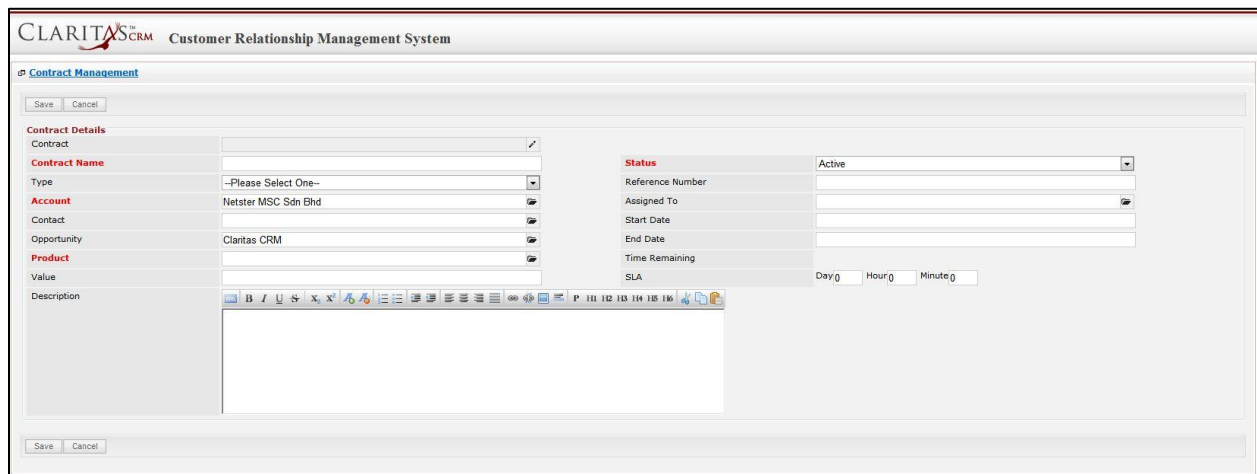


Figure 6.49: New Contract Management Popup


- 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)

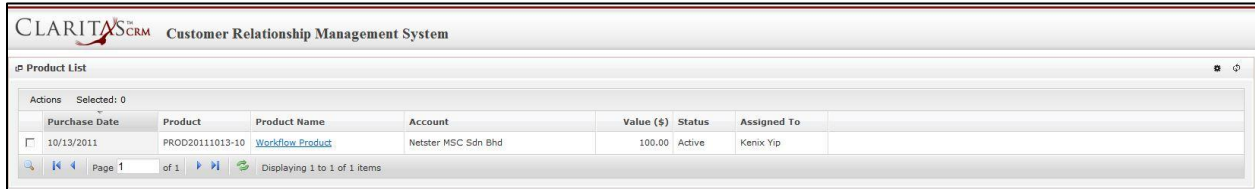





Figure 6.51: Product Listing Popup



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

To **cancel creating New Contract**, click  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  button to **confirm**.

Clicking  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  menu. Once  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**.

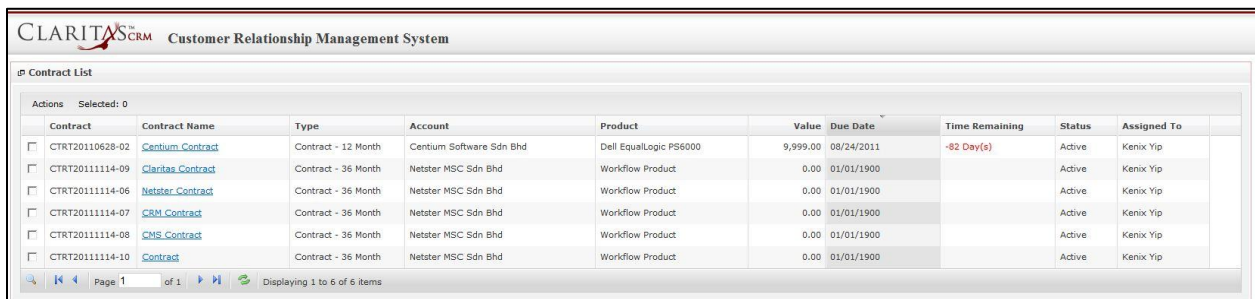


Figure 6.52: Select Contract Popup



## 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.

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

Figure 7.2: Quote Listing

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

Date	Quotation	Title	Customer	Company	Amount	Valid Until
11/10/2011	<a href="#">QT20111110-09</a>	Quotation for Claritas CRM	Kelvin Leow	Netster MSC Sdn Bhd	18,195.00	11/11/2011
11/10/2011	<a href="#">QT20111110-10</a>	Claritas CRM	Ho Joo Tan	Netster MSC Sdn Bhd	0.00	11/30/2011
11/09/2011	<a href="#">QT20111109-08</a>	Claritas CRM Quotation	Brandon Chang	Netster MSC Sdn Bhd	0.00	11/10/2011
10/13/2011	<a href="#">QT20111012-07</a>	Claritas Quotation	Kelvin Leow	Netster MSC Sdn Bhd	0.00	10/20/2011
08/30/2011	<a href="#">QT20110721-02</a>	Quotation for eCommerce	Ho Joo Tan	Netster MSC Sdn Bhd	(5,392.03)	08/31/2011
08/11/2011	<a href="#">QT20110811-05</a>	CRM Quotation	Brandon Chang	Netster MSC Sdn Bhd	27,300.00	08/12/2011

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.

**Quote Management** > QT20111109-08

Buttons: Edit, Cancel, Copy New

**Quote Details**

Quotation	QT20111109-08	Status	Draft
Title	Claritas CRM Quotation	Payment Terms	Cash On Delivery
Account	<a href="#">Netster MSC Sdn Bhd</a>	Assigned To	<a href="#">Kenix Yip</a>
Contact	<a href="#">Brandon Chang</a>	Reference Number 1	
Opportunity	<a href="#">Claritas CRM</a>		
Quotation Date	11/09/2011		
Valid Until	11/10/2011	Validity Remaining	0 Day(s) Overdue

**Correspondence Address**

Billing		Shipping	
Address 1	246-248, Block A, Kelana Center Point	Address 1	246-248, Block A, Kelana Center Point
Address 2	No.3, Jalan SS7/19, Kelana Jaya	Address 2	No.3, Jalan SS7/19, Kelana Jaya
Address 3		Address 3	
City	Petaling Jaya	City	Petaling Jaya
Postcode	47301	Postcode	47301
State	Selangor Darul Ehsan	State	Selangor Darul Ehsan
Country	Malaysia	Country	Malaysia
Phone	+60378054185	Phone	+60378054186
Fax	+60378054184	Fax	+60378054184

**Other Information**

Note: Some description of the Claritas CRM Quotation

**System Information**

Created Date	11/09/2011 04:57:30 PM	Created By	FTSB/acyp
Last Updated Date	11/10/2011 03:48:13 PM	Last Updated By	FTSB/acyp

Quote Summary, Quote Items, Activities, History

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.

**Quote Management**

Actions **Create New** Selected: 0

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**.

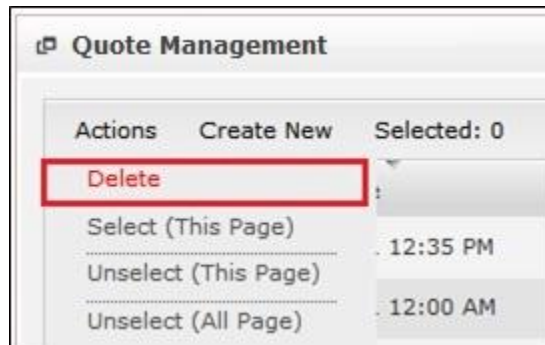


Figure 7.7: Action > Delete Menu

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)**.

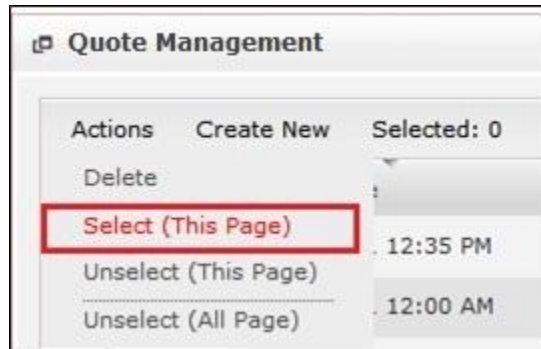


Figure 7.9: Actions > Select (This Page) Menu

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

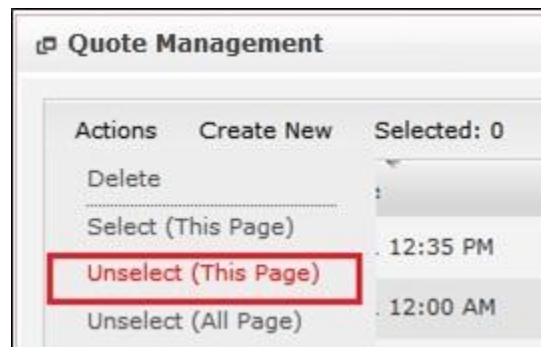


Figure 7.10: Actions > Unselect (This Page) Menu

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

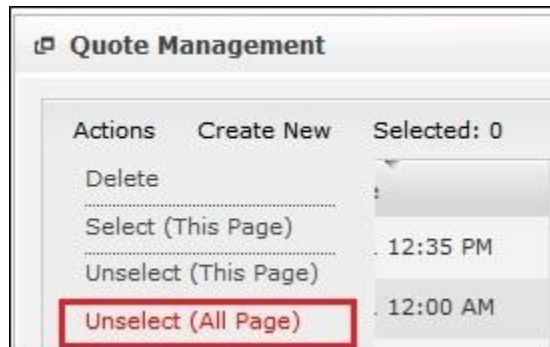






Figure 7.11: Actions > Unselect (All Pages) Menu

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.

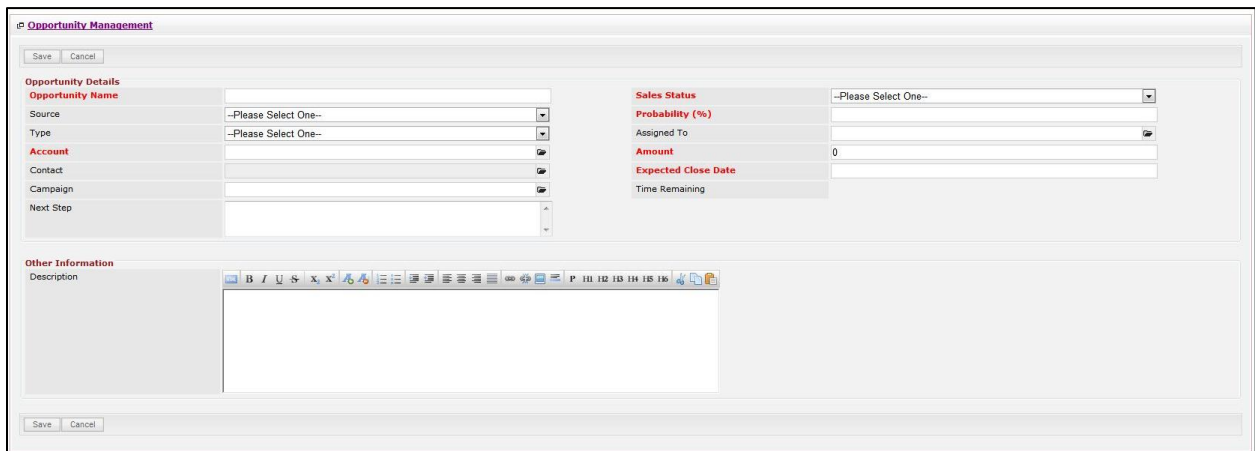


Figure 7.13: Quote Management Edit Page

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**.


<b>Quote Details</b>			
Quotation	QT20111110-10	<b>Status</b>	Negotiation
<b>Title</b>	Clartas CRM	<b>Payment Terms</b>	Cash On Delivery
<b>Account</b>	Netster MSC Sdn Bhd	Assigned To	Kenix Yip
Contact	Ho Joo Tan	Reference Number 1	
Opportunity			
<b>Quotation Date</b>	11/10/2011		
<b>Valid Until</b>	11/30/2011	Validity Remaining	19 Day(s) Remaining

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:
  - 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**

<b>Account</b>	pena
Contact	Pena Builders Sdn Bhd

Figure 7.15: Account Field Auto Complete Dropdown

- 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)

CLARITAS CRM Customer Relationship Management System									
Account List									
Actions Create New Selected: 0									
	Company	Type	Industry	Country	Phone	Fax	Website	Updated By	
<input type="checkbox"/>	Netster MSC Sdn Bhd	Shareholder	Technology	Malaysia	+60378054185	+60378054184	http://www.netstermsc.com	FTSB/scyjp	
<input checked="" type="checkbox"/>	Netster MSC Sdn Bhd (Cyberjaya)	Partner	Technology	Malaysia	+60355678892	+60355678893	http://www.netstermsc.com	FTSB/scyjp	
<input type="checkbox"/>	Netster MSC Sdn Bhd (Kuala Lumpur)	Partner	Technology	Malaysia	+60377888080	+60377888081	http://www.netstermsc.com	FTSB/scyjp	

Page 1 of 1 Displaying 1 to 3 of 3 items

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.

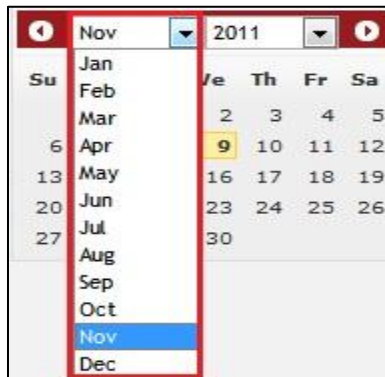


Figure 7.17: Quotation Date

- **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.

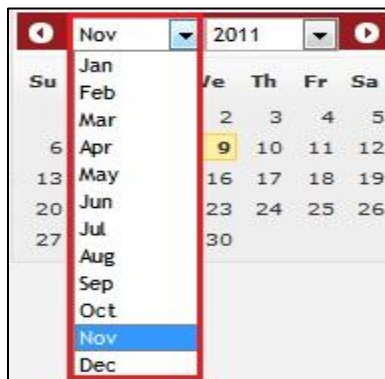
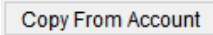
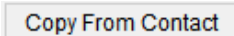


Figure 7.18: Valid Until

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

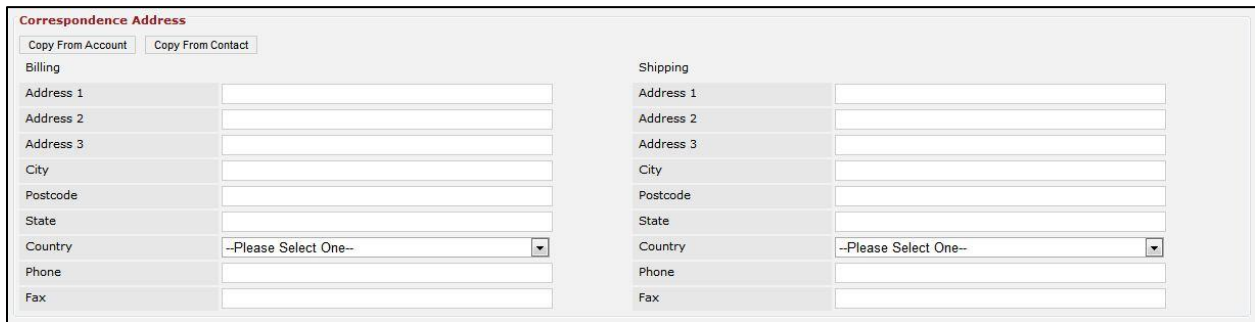


Figure 7.19: Create Quote - Correspondence Address

## 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  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  button in **Quote Management Detail** page. After clicking the **Edit**  button or 

button, page will navigate to **Quote Management Edit** page. Edit the relevant details and click 

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**.

Quote Details			
Quotation	QT20111110-10	Status	Negotiation
Title	Claritas CRM	Payment Terms	Cash On Delivery
Account	Netster MSC Sdn Bhd	Assigned To	Kenix Yip
Contact	Ho Joo Tan	Reference Number 1	
Opportunity			
Quotation Date	11/10/2011		
Valid Until	11/30/2011	Validity Remaining	19 Day(s) Remaining

**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**

Account	pena
Contact	Pena Builders Sdn Bhd

**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)

Company	Type	Industry	Country	Phone	Fax	Website	Updated By
<a href="#">Netster MSC Sdn Bhd</a>	Shareholder	Technology	Malaysia	+60378054185	+60378054184	http://www.netstermsc.com	FTSB\scyip
<a href="#">Netster MSC Sdn Bhd (Cyberjaya)</a>	Partner	Technology	Malaysia	+60355678892	+60355678893	http://www.netstermsc.com	FTSB\scyip
<a href="#">Netster MSC Sdn Bhd (Kuala Lumpur)</a>	Partner	Technology	Malaysia	+60377888080	+60377888081	http://www.netstermsc.com	FTSB\scyip

**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.

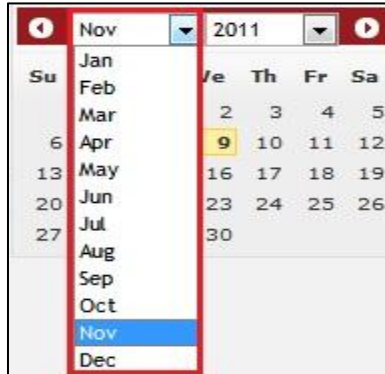


Figure 7.24: Quotation Date

- **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.

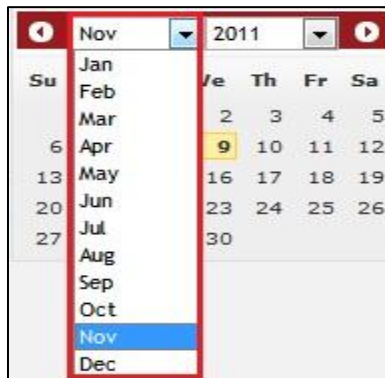


Figure 7.25: Valid Until

- **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  button or copy the address from the related Contact by clicking the  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  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.

Quote Summary	
<b>Quote Total</b>	
Refresh	
Quote Price	18,195.00
Quote Discount	3,000.00
Quote Tax	500.00
Quote Total	15,695.00

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  button to save the data.

**Quote Summary**

**Quote Total**

Refresh

Quote Price	18,195.00
Quote Discount	2000
Quote Tax	0.00
Quote Total	18,195.00

Save

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.*

**CLARITAS CRM** Customer Relationship Management System

**Quote Item Management**

Save Cancel

**Quote Item Details**

**Product Name** [Text Field]

Cost Price [Text Field]

Unit Price [Text Field]

**Quantity** 1

Total Price [Text Field]

**Ordering** 0

**Status** Active

Discount (\$) [Text Field]

Tax (\$) [Text Field]

Quote QT20111110-09

**Other Information**

Note [Rich Text Editor]

Save Cancel


Figure 7.30: New Quote Item Management Pop-up

- 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**

The screenshot shows a form with the following fields: Product Name, Cost Price, Unit Price, Quantity, and Total Price. The Product Name field contains the text 'netster' and has a dropdown menu open below it. The dropdown menu lists the following product options: Netster CMS Professional Edition, Netster CRM Basic Edition, Netster CRM Professional Edition, Netster E-Claims Professional Edition, and Netster HR Professional Edition. A red box highlights the dropdown menu.

**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)



The screenshot shows the 'CLARITAS CRM Customer Relationship Management System' interface. A 'Product List' popup window is open, displaying a table with the following columns: Purchase Date, Product, Product Name, Account, Value (\$), Status, and Assigned To. The table contains one row of data: 10/13/2011, PROD20111013-10, Workflow Product, Netster MSC Sdn Bhd, 100.00, Active, and Kenix Yip. The popup also includes a search bar, a 'Page 1 of 1' indicator, and a 'Displaying 1 to 1 of 1 items' message.

**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.

The screenshot shows the 'Quote Items' subpanel. It features a 'Create New' button and a table with the following columns: Order, Product Name, Quantity, Cost Price, Unit Price, Discount (\$), Tax (\$), Total Price, and Delete. The table contains one row of data: 2, Dell XPS 15Z, 5, 3,440.00, 3,699.00, 500.00, 200.00, 18,195.00, and a Delete button. The subpanel also includes a search bar, a 'Page 1 of 1' indicator, and a 'Displaying 1 to 1 of 1 items' message.

**Figure 7.33: Activities Subpanel List New Call**

To **cancel creating New Quote Item**, click  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  button to **confirm**.

Clicking  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  menu at **Activities** subpanel. Once  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  button to create the New Call. Or click  menu to cancel creating New Call.

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

The screenshot shows the 'Call Management' popup window in the CLARITAS CRM system. The window has a title bar with the CLARITAS CRM logo and the text 'Customer Relationship Management System'. Below the title bar, there is a 'Call Management' header with a 'Save' and 'Cancel' button. The main content area is divided into two columns. The left column is titled 'Call Details' and contains the following fields: 'Subject' (highlighted in red), 'Start Date' (highlighted in red), 'Duration' (with sub-fields for Day, Hour, and Minute), and 'Description' (with a rich text editor). The right column is titled 'Status' and contains the following fields: 'Status' (dropdown menu), 'Related To' (with a dropdown menu set to 'Quote' and a text field containing 'QT20111110-10'), and 'Assigned To' (with a text field). At the bottom of the window, there are 'Save' and 'Cancel' buttons.

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  menu to set the **current time** when the Call is created. Click at the  menu to set the date and time.

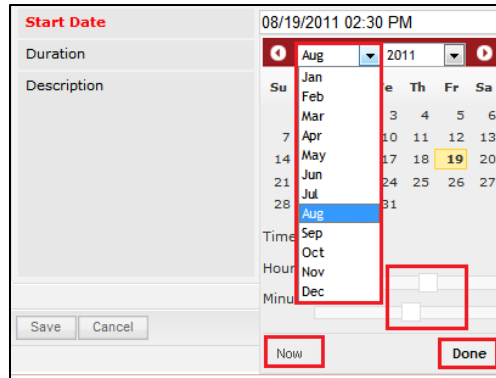



Figure 7.35: Start Date Time

- **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:

- 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

- 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)

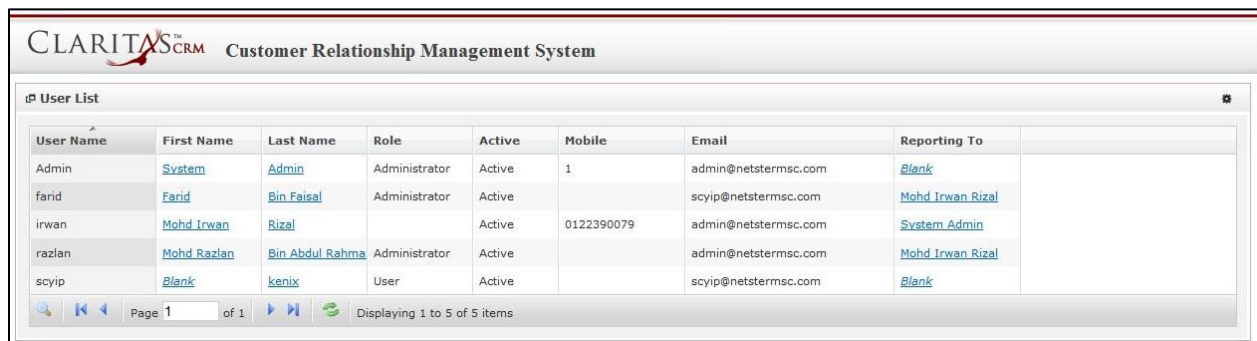


Figure 7.37: Assigned To Popup

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

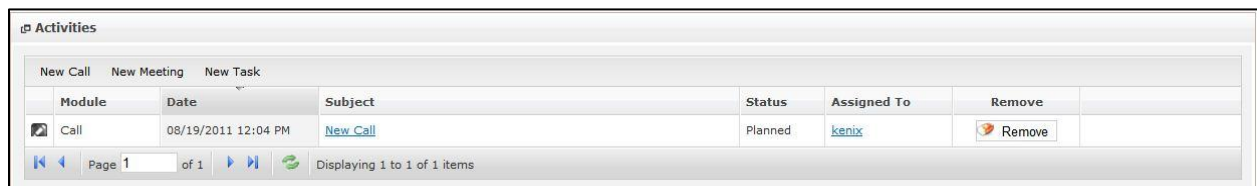


Figure 7.38: Activities Subpanel List New Call

To **cancel creating New Call**, click  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  button to **confirm**.

Clicking  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  menu at **Activities** subpanel. Once  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  button to create the New Meeting. Or click  menu to cancel creating New Meeting.

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

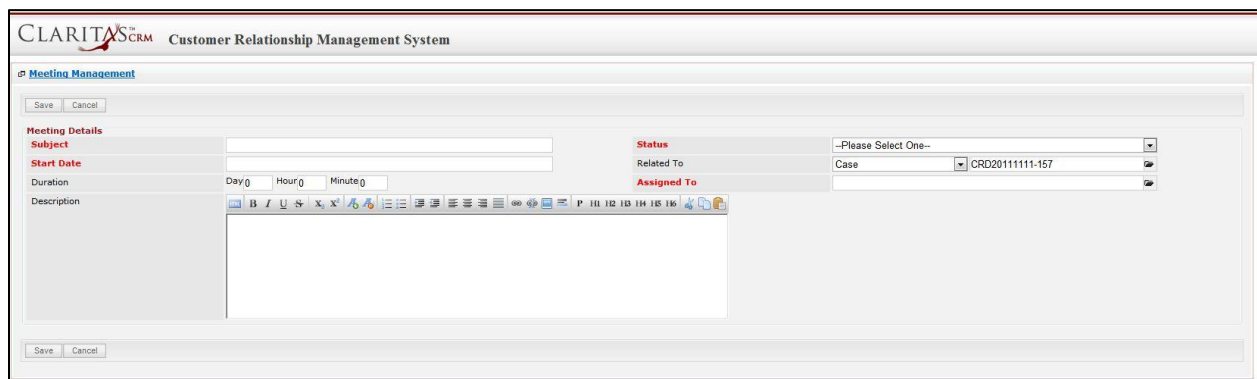


Figure 7.39: New Meeting Management Popup

- 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  menu to set the **current time** when the Meeting is created. Click at the  menu to set the date and time.



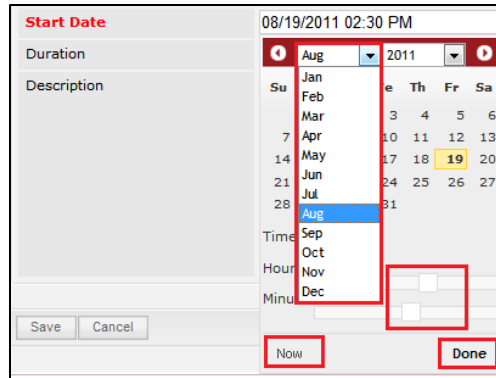


Figure 7.40: Start Date Time

- **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:

- 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


- 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 7.42: 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	<a href="#">New Meeting</a>	Not Held	<a href="#">kenix</a>	Remove
Call	08/19/2011 12:04 PM	<a href="#">New Call</a>	Planned	<a href="#">kenix</a>	Remove

Page 1 of 1 | Displaying 1 to 2 of 2 items

**Figure 7.43: Activities Subpanel List New Meeting**

To **cancel creating New Meeting**, click 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 button to **confirm**.

Clicking 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 menu at **Activities** subpanel. Once 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 button to create the New Task. Or click 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.

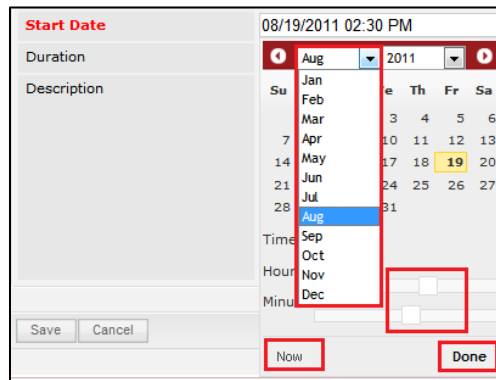


Figure 7.45: Start Date Time

- **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**

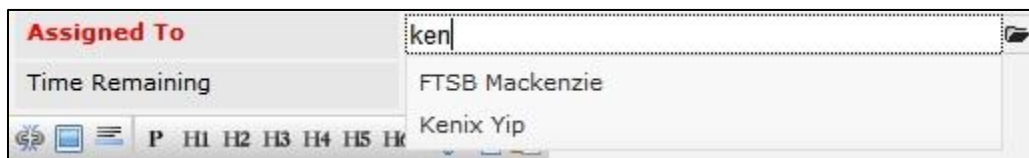



Figure 7.46: Assigned To Field Auto Complete Dropdown

- 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)

CLARITAS <sup>SM</sup> CRM Customer Relationship Management System							
User List							
User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	<a href="#">System</a>	<a href="#">Admin</a>	Administrator	Active	1	admin@netstermsc.com	<a href="#">Blank</a>
farid	<a href="#">Farid</a>	<a href="#">Bin Faisal</a>	Administrator	Active		scyip@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
irwan	<a href="#">Mohd Irwan</a>	<a href="#">Rizal</a>		Active	0122390079	admin@netstermsc.com	<a href="#">System Admin</a>
razlan	<a href="#">Mohd Razlan</a>	<a href="#">Bin Abdul Rahma</a>	Administrator	Active		admin@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
scyip	<a href="#">Blank</a>	<a href="#">kenix</a>	User	Active		scyip@netstermsc.com	<a href="#">Blank</a>

Page 1 of 1    Displaying 1 to 5 of 5 items

Figure 7.47: 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	<a href="#">New Task</a>	Not Held	<a href="#">kenix</a>	Remove	
	Meeting	08/19/2011 12:18 PM	<a href="#">New Meeting</a>	Not Held	<a href="#">kenix</a>	Remove	
	Call	08/19/2011 12:04 PM	<a href="#">New Call</a>	Planned	<a href="#">kenix</a>	Remove	

Page 1 of 1    Displaying 1 to 3 of 3 items

Figure 7.48: Activities Subpanel List New Task

To **cancel creating New Task**, click  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  button to **confirm**.

Clicking  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  menu at **History** subpanel. Once  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  button to create the New Note.

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

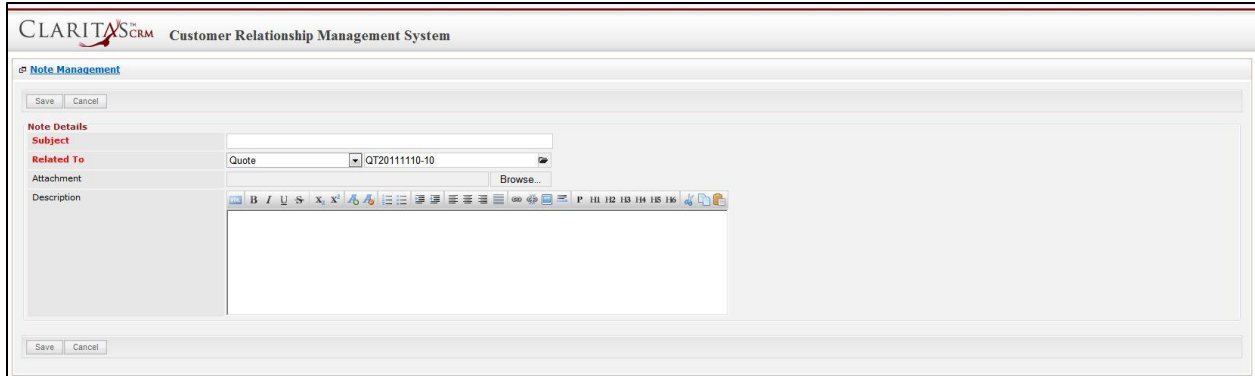


Figure 7.49: New Note Management Popup

- 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.

Date	Case	Type	Source	Customer	Company	Priority	Due Date	Time Remaining	Status	Assigned To
11/11/2011 10:59:39 AM	<a href="#">CRD20111111-157</a>	Complaint	Email	Brandon Chang	Netster MSC Sdn Bhd	High	11/11/2011 02:55:46 PM	-3 Day(s) 2 Hour(s)	Open - New	Kenix Yip
10/19/2011 10:37:37 AM	<a href="#">CRD20111019-154</a>	Comment	Web	Brandon Chang	Netster MSC Sdn Bhd	High	10/19/2011 02:37:37 PM	-26 Day(s) 3 Hour(s)	Closed - Dup	

Figure 8.2: Case Listing

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

Date	Case	Type	Source	Customer	Company	Priority
11/11/2011 10:59:39 AM	<a href="#">CRD20111111-157</a>	Complaint	Email	Brandon Chang	Netster MSC Sdn Bhd	High
10/19/2011 10:37:37 AM	<a href="#">CRD20111019-154</a>	Comment	Web	Brandon Chang	Netster MSC Sdn Bhd	High

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**.

Case Management > CRD20111111-157

Buttons: Edit, Cancel, Copy New, Refresh

**Case Details**

Case	CRD20111111-157	Status	Open - New
Type	Complaint	Assigned To	<a href="#">Kenix Yip</a>
Source		Priority	High
Account	<a href="#">Netster MSC Sdn Bhd</a>	Due Date	11/11/2011 02:55:46 PM
Contact	<a href="#">Brandon Chena</a>	Time Remaining	0 Day(s) Remaining

**Customer Feedback Form**

First Name	Mohd	Salutation	Mr
Last Name	Razlan	Home Phone	+60378054186
Title	Director	Mobile	+60175564132
Company	Razlan & Friend Associates	Email	razlan@netstermsc.com

**Case Resolution**

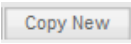
Subject	Unable to edit existing information
Description	I was unable to edit the existing information.
Resolution	Is this because of the access right?

**System Information**

Created Date	11/11/2011 10:59:39 AM	Created By	FTSB\scyp
Last Updated Date	11/11/2011 10:59:39 AM	Last Updated By	FTSB\scyp
System Closed Date			

Activities, History, Issues sections are present but empty.

Figure 8.4: Case Management Detail Page

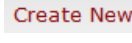


To copy the entire record and save as a new record, click  button at **Case Maintenance Detail** page.

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

Case Management

Actions  Selected: 0

Figure 8.5: Create New Case Menu

After clicking  menu, page will navigate to **Case Management** page. Enter the relevant details and click  button to save the changes and navigates to **Case Management Detail** page or click  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**.

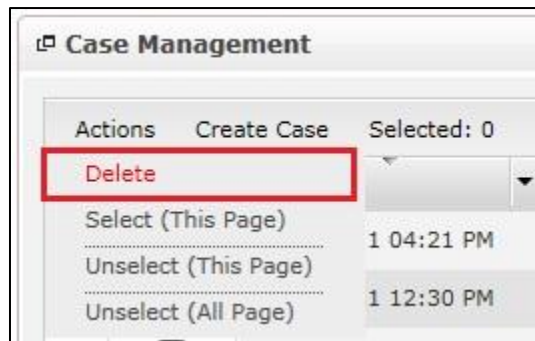


Figure 8.7: Action > Delete Menu

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)**.

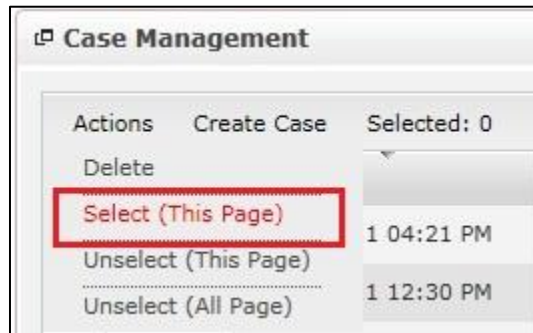


Figure 8.9: Actions > Select (This Page) Menu

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

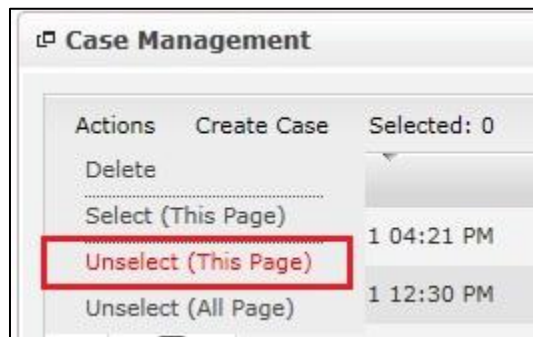


Figure 8.10: Actions > Unselect (This Page) Menu

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

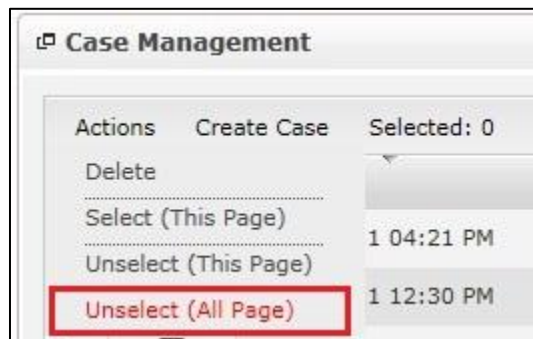






Figure 8.11: Actions > Unselect (All Pages) Menu



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

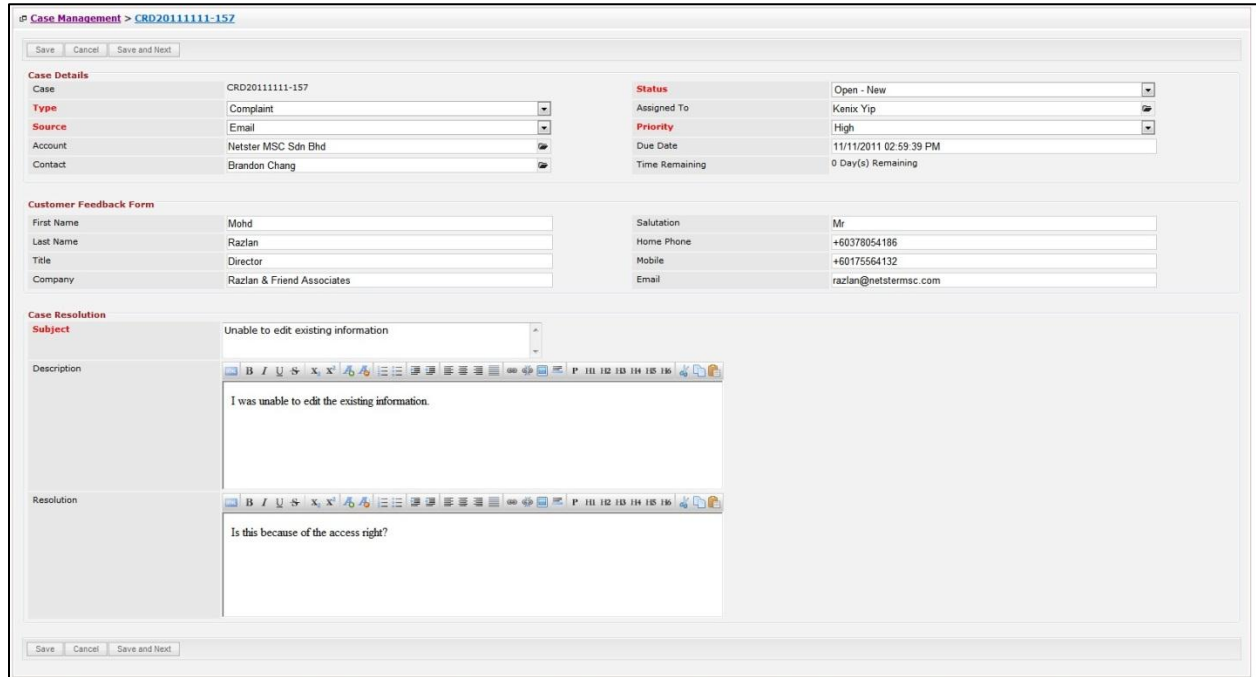
To go to the Previous Page of the listing, click at the **Previous Page**  button.

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.**

<b>Case Details</b>			
Case	CRD20111111-157	<b>Status</b>	Open - New
<b>Type</b>	Complaint	Assigned To	Kenix Yip
<b>Source</b>	Email	<b>Priority</b>	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 8.13: 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.

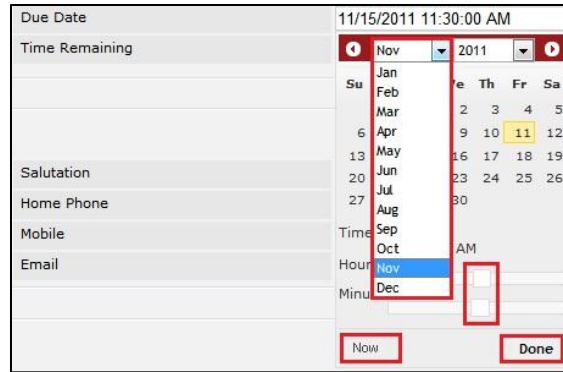


Figure 8.14: Due Date Time

- 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

Customer Feedback Form			
First Name	Mohd	Salutation	Mr
Last Name	Razlan	Home Phone	+60378054186
Title	Director	Mobile	+60175564132
Company	Razlan & Friend Associates	Email	razlan@netstermsc.com

Figure 8.15: Create Case – Customer Feedback Form

### 9) Case Information






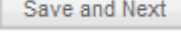
- Compulsory fields: **Subject**.
- For user to enter the related Case Subject, Case Description and Resolution.

Case Resolution	
Subject	Unable to edit existing information
Description	I was unable to edit the existing information.
Resolution	Is this because of the access right?

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**.

<b>Case Details</b>	
Case	CRD20111111-157
<b>Type</b>	Complaint
<b>Source</b>	Email
Account	Netster MSC Sdn Bhd
Contact	Brandon Chang
<b>Status</b>	Open - New
Assigned To	Kenix Yip
<b>Priority</b>	High
Due Date	11/11/2011 02:59:39 PM
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.

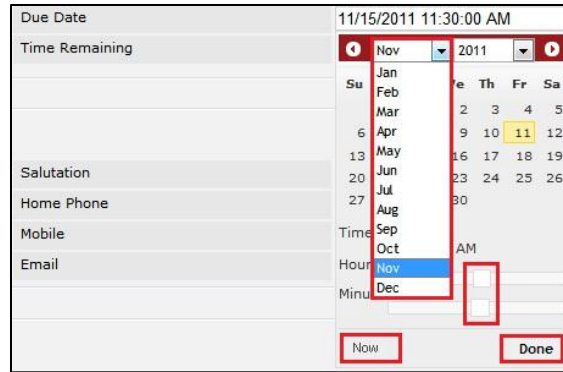


Figure 8.18: Due Date Time

- 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

Customer Feedback Form			
First Name	Mohd	Salutation	Mr
Last Name	Razlan	Home Phone	+60378054186
Title	Director	Mobile	+60175564132
Company	Razlan & Friend Associates	Email	razlan@netstermsc.com

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.

Case Resolution	
Subject	Unable to edit existing information
Description	I was unable to edit the existing information.
Resolution	Is this because of the access right?

Figure 8.20: Edit Case – Case Resolution

To cancel editing Case, click  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:

- 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

- 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)

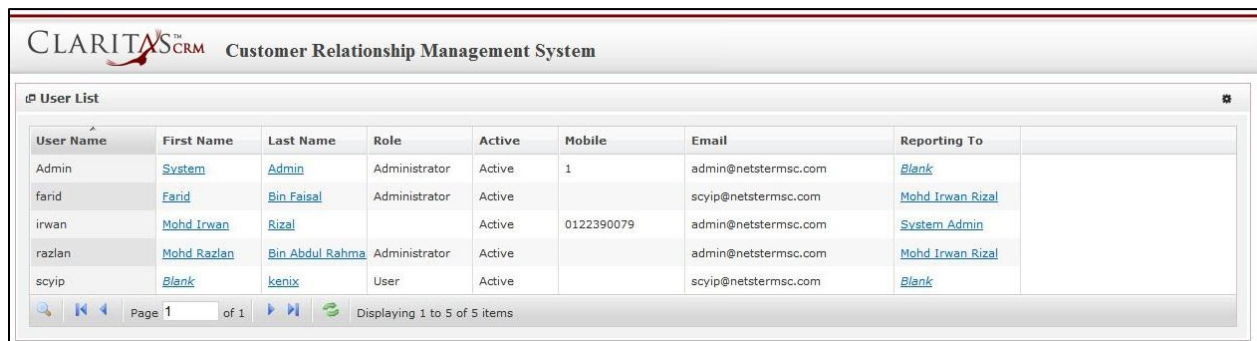


Figure 8.24: Assigned To Popup

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

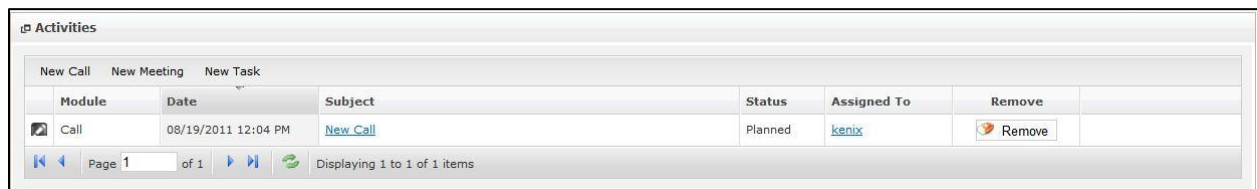




Figure 8.25: Activities Subpanel List New Call

To **cancel creating New Call**, click  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  button to **confirm**.

Clicking  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.*

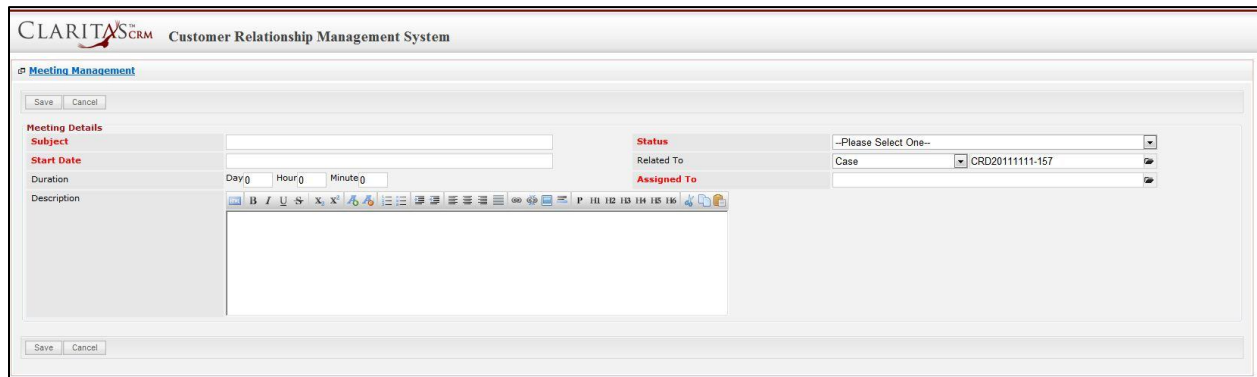


Figure 8.26: New Meeting Management Popup

- 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.

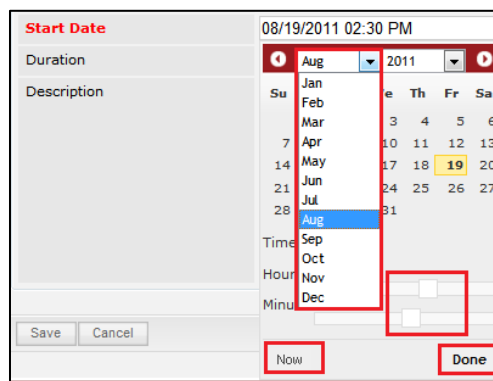



Figure 8.27: Start Date Time

- **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)

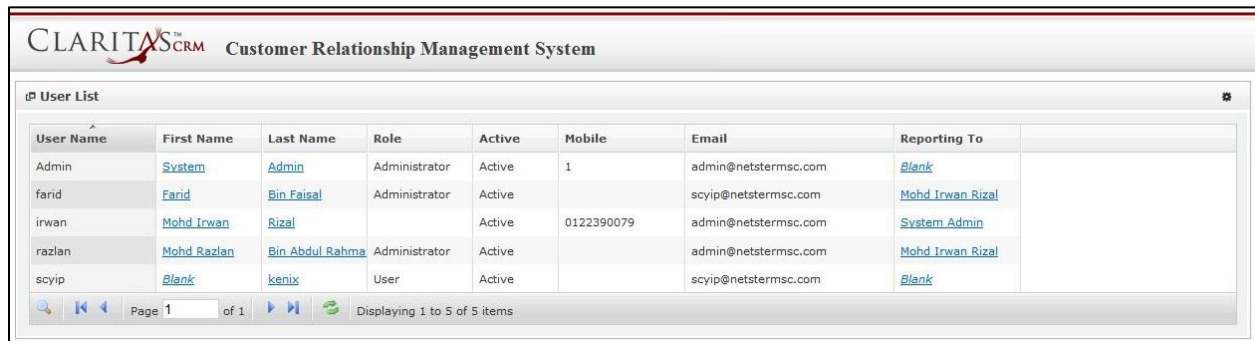


Figure 8.29: Assigned To Popup

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

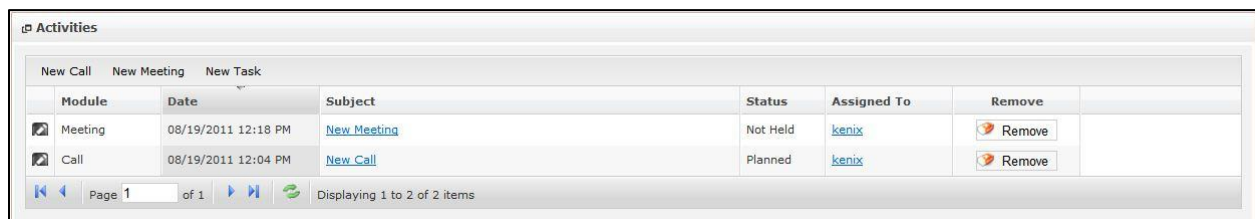




Figure 8.30: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click  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  button to **confirm**.

Clicking  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.

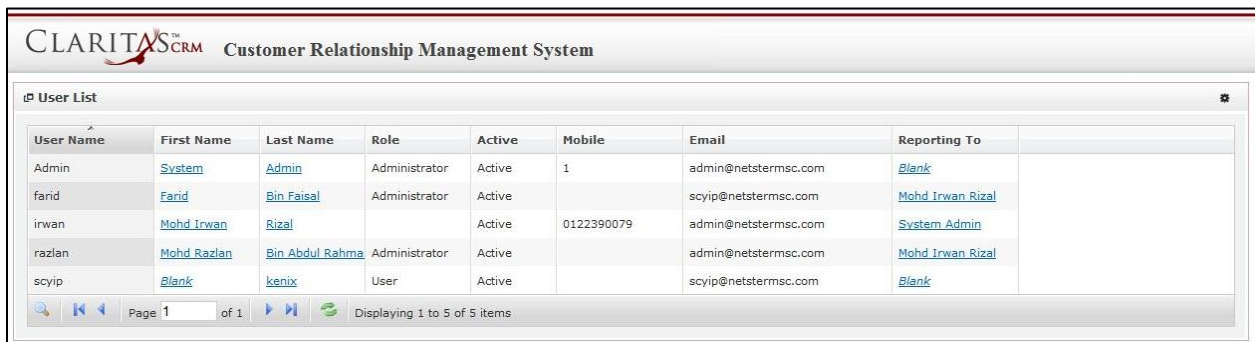
- There are five **Statuses** available for Task- **Not Started, In Progress, Completed, Pending Input,** and **Deferred.**
- **Assigned To** field is to assign a User to in charge of the Task for the related Case. There are two ways of entering the Assigned To field:
  - Type in the First Name or Last 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**

- 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  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  button to **confirm**.

Clicking  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, .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.

Module	Date	Subject	Attachment	Remove
Note	08/19/2011 03:23 PM	<a href="#">New Note</a>		Remove

Figure 8.37: 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.

## Case – Issues Subpanel

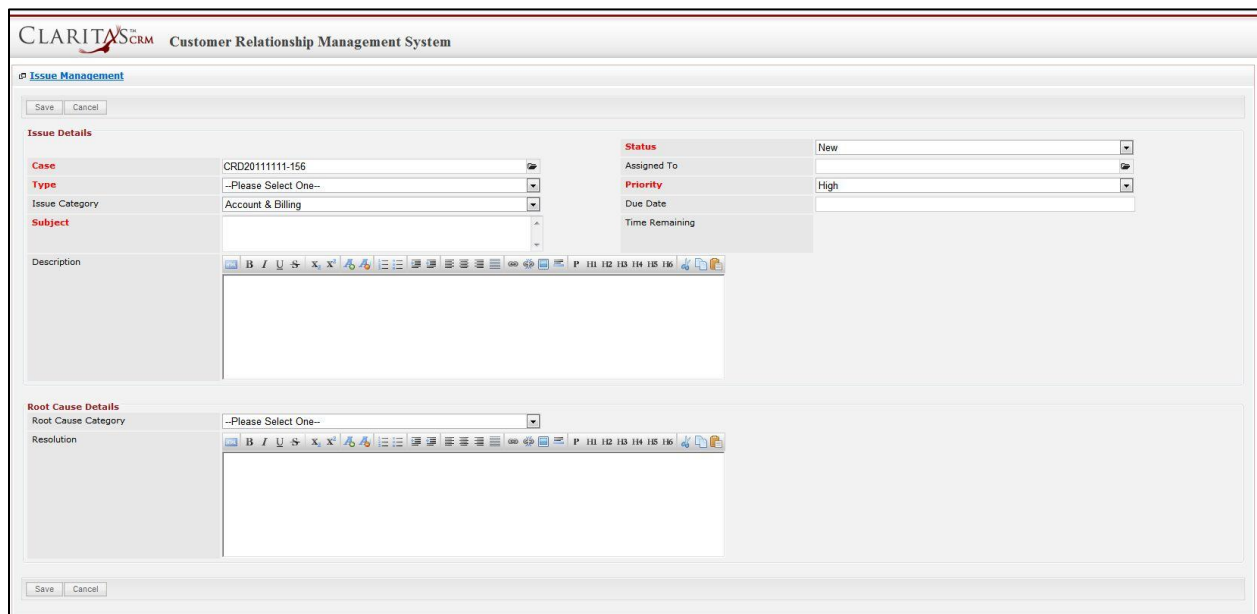
This subpanel contains any Issue related to the **Case**.

## Create New Issue

To create a New Issue related to a Case, click at the  menu at **Issue** subpanel. Once  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  button to create the New Issue.

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



The screenshot displays the 'New Issue Management' popup window within the CLARITAS CRM interface. The window title is 'Issue Management' and it contains a 'Save' and 'Cancel' button at the top left. The form is divided into several sections:

- Issue Details:** This section contains several fields. The 'Case' field is pre-filled with 'CRD20111111-156'. The 'Type' field is a dropdown menu with '--Please Select One--' selected. The 'Subject' field is a text input field. The 'Status' field is a dropdown menu with 'New' selected. The 'Assigned To' field is a dropdown menu. The 'Priority' field is a dropdown menu with 'High' selected. The 'Due Date' and 'Time Remaining' fields are empty.
- Root Cause Details:** This section contains a 'Root Cause Category' dropdown menu with '--Please Select One--' selected. Below it is a 'Resolution' text input field.

At the bottom of the window, there are 'Save' and 'Cancel' buttons.

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  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  button to **confirm**.

Clicking  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  menu. Once  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	<a href="#">CRD20110922-128-25</a>	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	<a href="#">.01</a>		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	<a href="#">CRD20110811-118-22</a>	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	<a href="#">CRD20110727-114-01</a>	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	<a href="#">CRD20110728-117-01</a>	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	<a href="#">CRD000016-16-19</a>	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	<a href="#">CRD000016-16-18</a>	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	<a href="#">CRD20110630-104-01</a>	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	<a href="#">CRD000016-16-15</a>	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	<a href="#">CRD000021-21-13</a>	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	<a href="#">CRD20110613-27-05</a>	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.

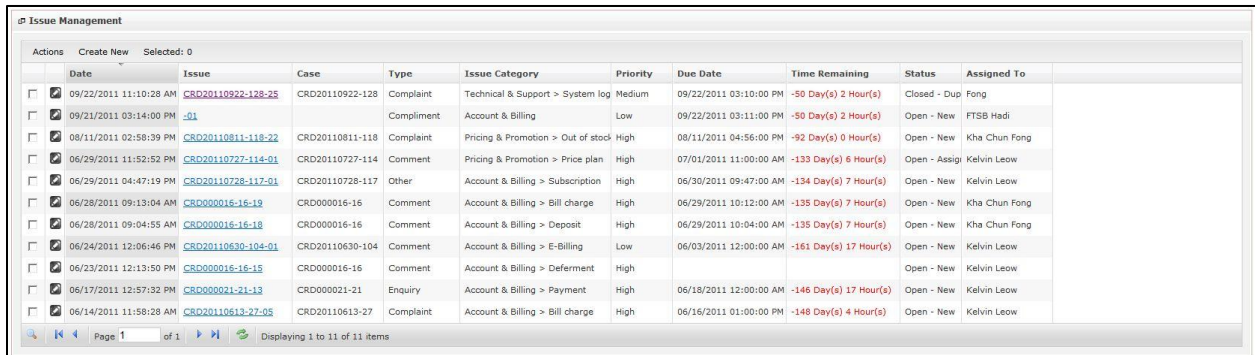
### Issue Listing

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.



Actions	Create New	Selected: 0	Date	Issue	Case	Type	Issue Category	Priority	Due Date	Time Remaining	Status	Assigned To
<input type="checkbox"/>	<input checked="" type="checkbox"/>		09/22/2011 11:10:28 AM	<a href="#">CRD20110922-128-25</a>	CRD20110922-128	Complaint	Technical & Support > System log	Medium	09/22/2011 03:10:00 PM	-50 Day(s) 2 Hour(s)	Closed - Dup	Fong
<input type="checkbox"/>	<input checked="" type="checkbox"/>		09/21/2011 03:14:00 PM	<a href="#">-01</a>		Compliment	Account & Billing	Low	09/22/2011 03:11:00 PM	-50 Day(s) 2 Hour(s)	Open - New	FTSB Hadi
<input type="checkbox"/>	<input checked="" type="checkbox"/>		08/11/2011 02:58:39 PM	<a href="#">CRD20110811-118-22</a>	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
<input type="checkbox"/>	<input checked="" type="checkbox"/>		06/29/2011 11:52:52 PM	<a href="#">CRD20110727-114-01</a>	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
<input type="checkbox"/>	<input checked="" type="checkbox"/>		06/29/2011 04:47:19 PM	<a href="#">CRD20110728-117-01</a>	CRD20110728-117	Other	Account & Billing > Subscription	High	06/30/2011 09:47:00 AM	-134 Day(s) 7 Hour(s)	Open - New	Kelvin Leow
<input type="checkbox"/>	<input checked="" type="checkbox"/>		06/28/2011 09:13:04 AM	<a href="#">CRD000016-16-19</a>	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
<input type="checkbox"/>	<input checked="" type="checkbox"/>		06/28/2011 09:04:55 AM	<a href="#">CRD000016-16-18</a>	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
<input type="checkbox"/>	<input checked="" type="checkbox"/>		06/24/2011 12:06:46 PM	<a href="#">CRD20110630-104-01</a>	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
<input type="checkbox"/>	<input checked="" type="checkbox"/>		06/23/2011 12:13:50 PM	<a href="#">CRD000016-16-18</a>	CRD000016-16	Comment	Account & Billing > Deferment	High			Open - New	Kelvin Leow
<input type="checkbox"/>	<input checked="" type="checkbox"/>		06/17/2011 12:57:32 PM	<a href="#">CRD000021-21-13</a>	CRD000021-21	Enquiry	Account & Billing > Payment	High	06/18/2011 12:00:00 AM	-146 Day(s) 17 Hour(s)	Open - New	Kelvin Leow
<input type="checkbox"/>	<input checked="" type="checkbox"/>		06/14/2011 11:58:28 AM	<a href="#">CRD20110613-27-05</a>	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 9.2: Issue Listing

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



Issue Management							
Actions Create New Selected: 0							
	Date	Issue	Case	Type	Issue Category	Priority	Due Date
<input type="checkbox"/>	09/22/2011 11:10:28 AM	<a href="#">CRD20110922-128-25</a>	CRD20110922-128	Complaint	Technical & Support > System log	Medium	09/22/2011 03:10:00 PM
<input type="checkbox"/>	09/21/2011 03:14:00 PM	<a href="#">-01</a>		Compliment	Account & Billing	Low	09/22/2011 03:11:00 PM
<input type="checkbox"/>	08/11/2011 02:58:39 PM	<a href="#">CRD20110811-118-22</a>	CRD20110811-118	Complaint	Pricing & Promotion > Out of stock	High	08/11/2011 04:56:00 PM
<input type="checkbox"/>	06/29/2011 11:52:52 PM	<a href="#">CRD20110727-114-01</a>	CRD20110727-114	Comment	Pricing & Promotion > Price plan	High	07/01/2011 11:00:00 AM
<input type="checkbox"/>	06/29/2011 04:47:19 PM	<a href="#">CRD20110728-117-01</a>	CRD20110728-117	Other	Account & Billing > Subscription	High	06/30/2011 09:47:00 AM
<input type="checkbox"/>	06/28/2011 09:13:04 AM	<a href="#">CRD000016-16-19</a>	CRD000016-16	Comment	Account & Billing > Bill charge	High	06/29/2011 10:12:00 AM
<input type="checkbox"/>	06/28/2011 09:04:55 AM	<a href="#">CRD000016-16-18</a>	CRD000016-16	Comment	Account & Billing > Deposit	High	06/29/2011 10:04:00 AM
<input type="checkbox"/>	06/24/2011 12:06:46 PM	<a href="#">CRD20110630-104-01</a>	CRD20110630-104	Comment	Account & Billing > E-Billing	Low	06/03/2011 12:00:00 AM
<input type="checkbox"/>	06/23/2011 12:13:50 PM	<a href="#">CRD000016-16-15</a>	CRD000016-16	Comment	Account & Billing > Deferment	High	
<input type="checkbox"/>	06/17/2011 12:57:32 PM	<a href="#">CRD000021-21-13</a>	CRD000021-21	Enquiry	Account & Billing > Payment	High	06/18/2011 12:00:00 AM
<input type="checkbox"/>	06/14/2011 11:58:28 AM	<a href="#">CRD20110613-27-05</a>	CRD20110613-27	Complaint	Account & Billing > Bill charge	High	06/16/2011 01:00:00 PM

Page 1 of 1 Displaying 1 to 11 of 11 items

Figure 9.3: Issue ID Hyperlink

After clicking the Issue ID 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**.

Issue Management > CRD20110922-128-25

Edit Cancel Copy New

<b>Issue Details</b>	Issue: CRD20110922-128-25	Status: Closed - Rejected
	Case: <a href="#">CRD20110922-128</a>	Assigned To: <a href="#">Fana</a>
	Type: Complaint	Priority: Medium
	Issue Category: Technical & Support > System login	Due Date: 09/22/2011 03:10:00 PM
	Subject: user complaint labtop failed	Time Remaining: 50 Day(s) Overdue
	Description: please help	
<b>Root Cause Details</b>	Root Cause Category: System > Hardware failure	
	Resolution: Fixed the hard disk.	
<b>System Information</b>	Created Date: 09/22/2011 11:10:28 AM	Created By: fbb/ucchang
	Last Updated Date: 10/27/2011 06:01:15 PM	Last Updated By: FTSE/ckgan
	System Closed Date: 10/27/2011 06:01:15 PM	

Activities

History

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.

Issue Management

Actions **Create New** Selected: 0

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)**.

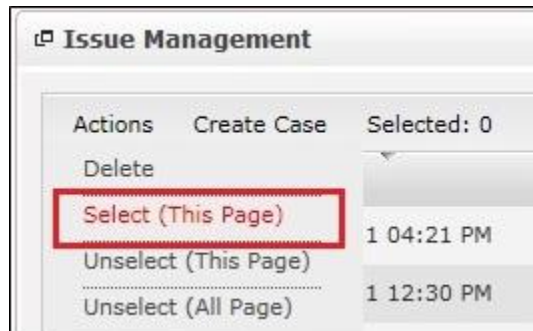


Figure 9.9: Actions > Select (This Page) Menu

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

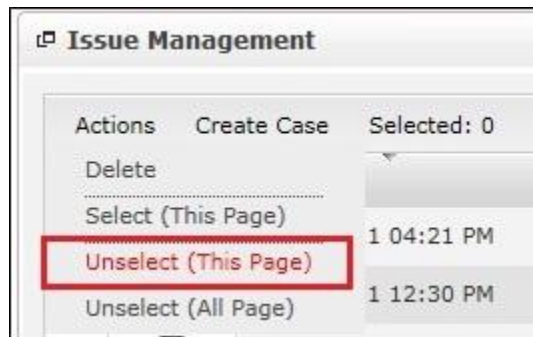


Figure 9.10: Actions > Unselect (This Page) Menu

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

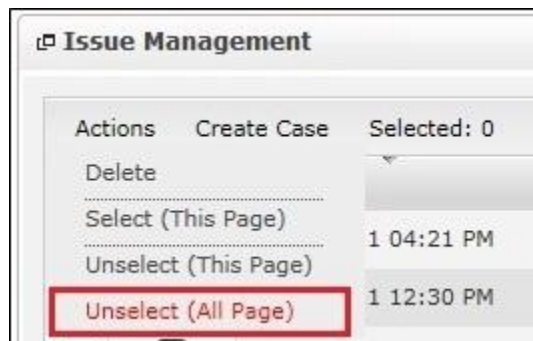






Figure 9.11: Actions > Unselect (All Pages) Menu



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 **Edit** button in **Issue Management Detail** page. After clicking at the **Edit**  button page will navigate to the **Issue Management Edit** page.

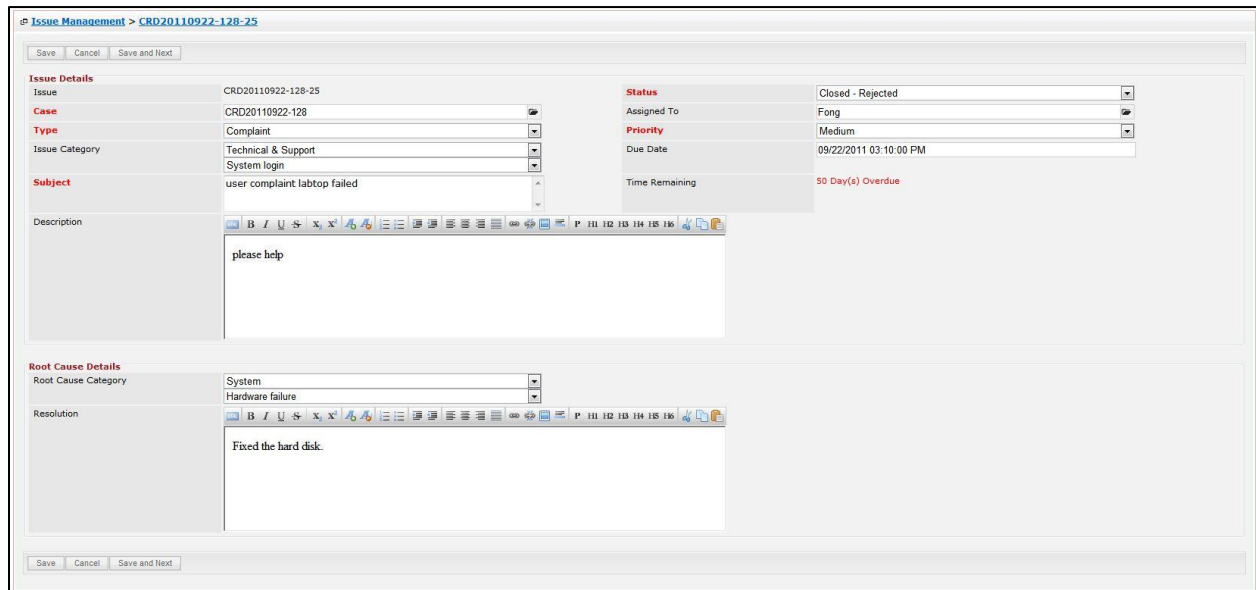


Figure 9.12: Issue Management Edit Page

Edit the relevant details and click **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 of the next Issue. Or click **Cancel** 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**.

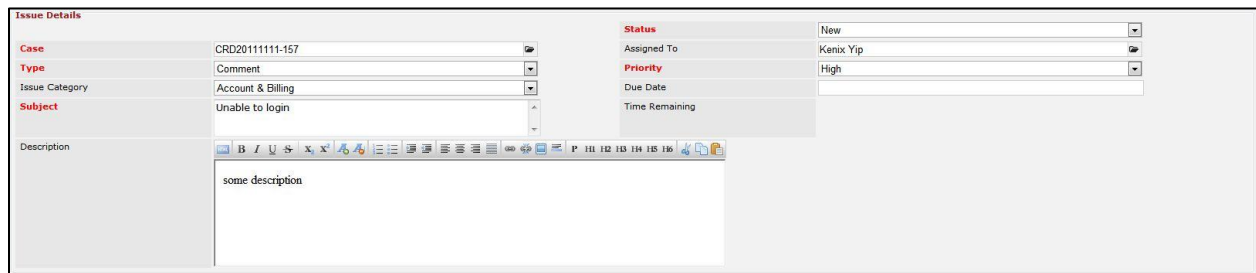


Figure 9.13: Create Issue - Issue Details

- **Case** field is to associate the issue to the related Case. There are two ways of entering the **Case** field:
  - 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**

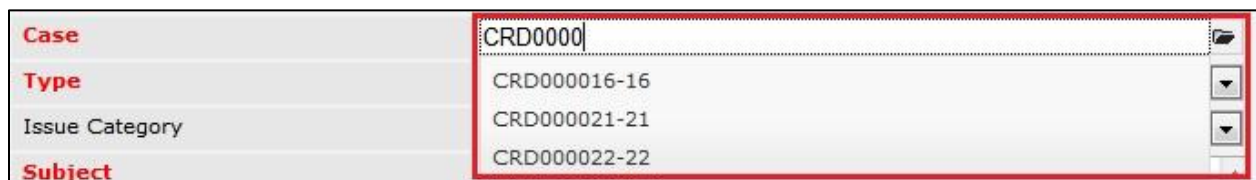



Figure 9.14: Case Field Auto Complete Dropdown

- 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)

CLARITAS CRM Customer Relationship Management System											
Case List											
Actions Selected: 0											
Date	Case	Type	Source	Customer	Company	Priority	Due Date	Time Remaining	Status	Assigned To	
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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	
<input type="checkbox"/>	10/18/2011 12:40:49 PM	CRD20111018-153	Compliment	Email		Netster MSC Sdn Bhd (Kuala Lumpur)	High	10/18/2011 05:00:00 PM	-26 Day(s) 18 Hour(s)	Open - New	Kenix Yip
<input type="checkbox"/>	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
<input type="checkbox"/>	10/18/2011 11:44:19 AM	CRD20111018-151	Complaint	Web				01/01/1900 12:00:00 AM			
<input type="checkbox"/>	10/18/2011 11:42:44 AM	CRD20111018-150	Complaint	Web				01/01/1900 12:00:00 AM			
<input type="checkbox"/>	10/18/2011 11:36:14 AM	CRD20111018-149	Complaint	Web				01/01/1900 12:00:00 AM			
<input type="checkbox"/>	10/18/2011 11:31:53 AM	CRD20111018-148	Complaint	Web				01/01/1900 12:00:00 AM			
<input type="checkbox"/>	10/18/2011 11:27:32 AM	CRD20111018-147	Complaint	Web				01/01/1900 12:00:00 AM			
<input type="checkbox"/>	10/18/2011 11:25:42 AM	CRD20111018-146	Complaint	Web				01/01/1900 12:00:00 AM			
<input type="checkbox"/>	10/18/2011 11:23:18 AM	CRD20111018-145	Complaint	Web				01/01/1900 12:00:00 AM			
<input type="checkbox"/>	10/18/2011 11:22:56 AM	CRD20111018-144	Complaint	Web				01/01/1900 12:00:00 AM			
<input type="checkbox"/>	10/10/2011 09:44:18 PM	CRD20111010-143						01/01/1900 12:00:00 AM			

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.

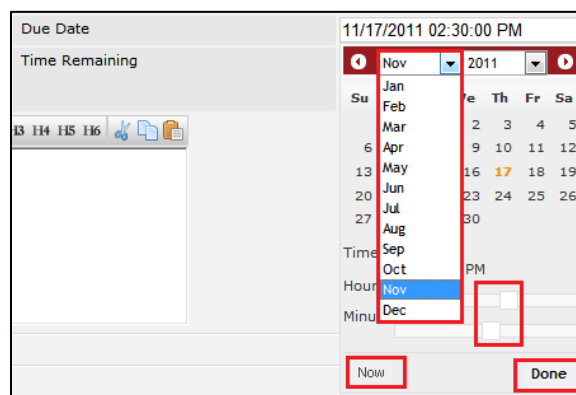


Figure 9.16: Due Date Time

- 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.

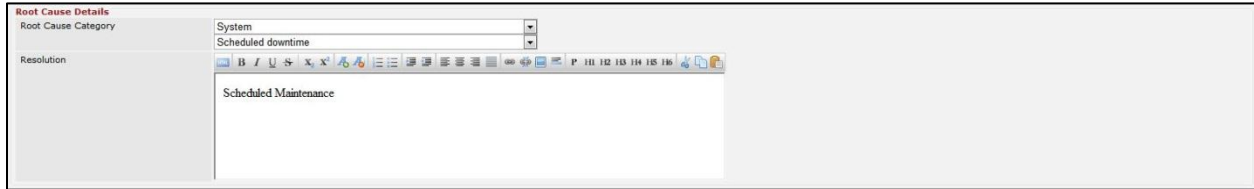






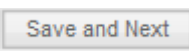


Figure 9.17: Create Issue – Root Cause Details

To cancel creating New Issue, click  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  button in **Issue Management Detail** page. After clicking the **Edit**  button or  button, page will navigate to the **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** 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**.

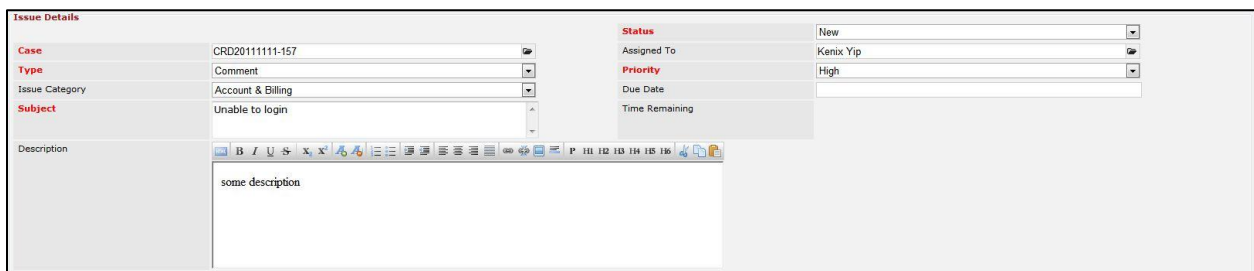



Figure 9.18: Edit Issue - Issue Details

- **Case** field is to associate the issue to the related Case. There are two ways of entering the **Case** field:
  - 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**

<b>Case</b>	CRD0000
<b>Type</b>	CRD000016-16
<b>Issue Category</b>	CRD000021-21
<b>Subject</b>	CRD000022-22

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)

CLARITAS CRM Customer Relationship Management System

Case List

Date	Case	Type	Source	Customer	Company	Priority	Due Date	Time Remaining	Status	Assigned To
11/11/2011 10:59:39 AM	<a href="#">CRD20111111-152</a>	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	<a href="#">CRD20111111-156</a>	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	<a href="#">CRD20111103-155</a>	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	<a href="#">CRD20111019-154</a>	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	<a href="#">CRD20111018-153</a>	Compliment	Email		Netster MSC Sdn Bhd (Kuala Lum)	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	<a href="#">CRD20111018-152</a>	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	<a href="#">CRD20111018-151</a>	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:42:44 AM	<a href="#">CRD20111018-150</a>	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:36:14 AM	<a href="#">CRD20111018-149</a>	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:31:53 AM	<a href="#">CRD20111018-148</a>	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:27:32 AM	<a href="#">CRD20111018-147</a>	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:25:42 AM	<a href="#">CRD20111018-146</a>	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:23:18 AM	<a href="#">CRD20111018-145</a>	Complaint	Web				01/01/1900 12:00:00 AM			
10/18/2011 11:22:56 AM	<a href="#">CRD20111018-144</a>	Complaint	Web				01/01/1900 12:00:00 AM			
10/10/2011 09:44:18 PM	<a href="#">CRD20111010-142</a>						01/01/1900 12:00:00 AM			

Page 1 of 4    Displaying 1 to 15 of 57 items

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.



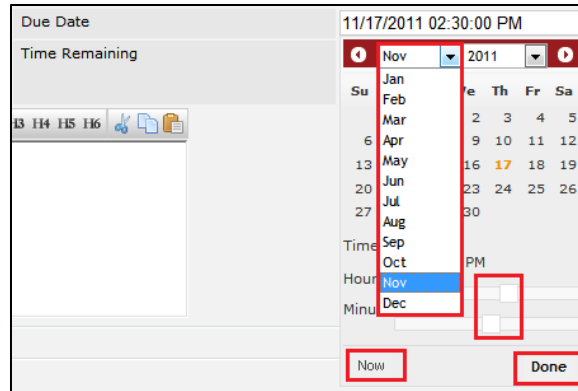


Figure 9.21: Due Date Time

- 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.

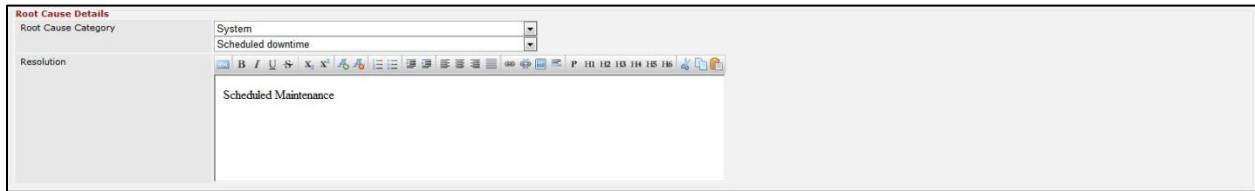


Figure 9.22: Edit Issue – Root Cause Details

To cancel editing Issue, click  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  menu at **Activities** subpanel. Once  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  button to create the New Call.

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

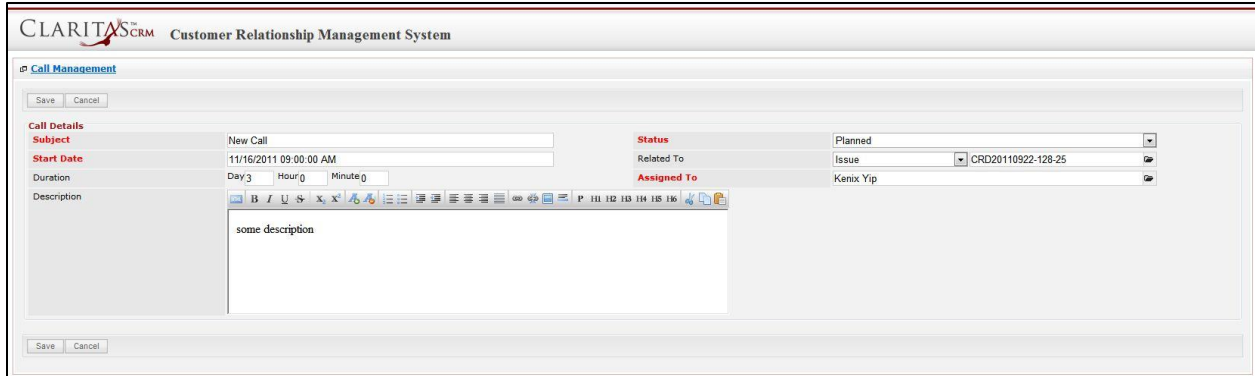


Figure 9.23: New Call Management Popup

- 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.

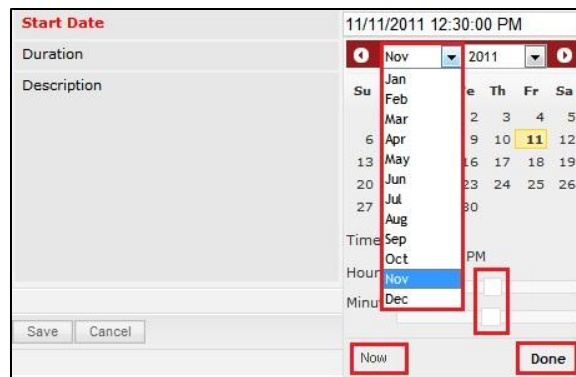


Figure 9.24: Start Date Time


- **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:

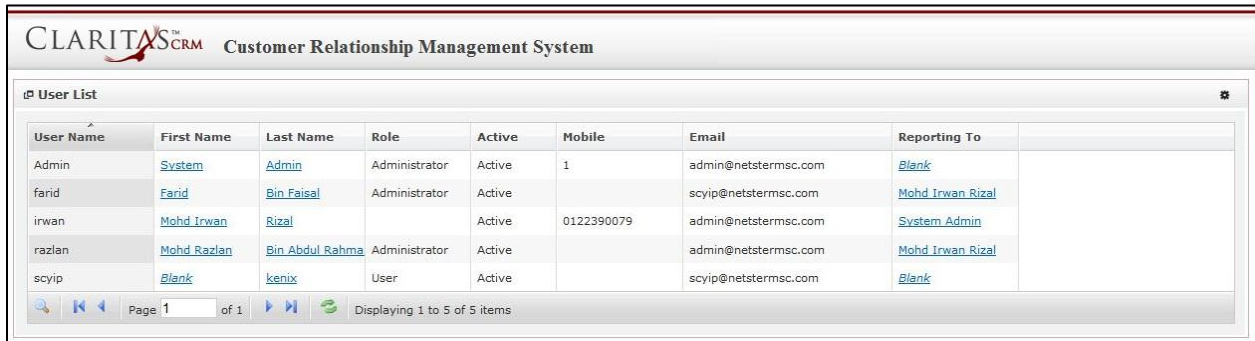
- Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)

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)



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

Figure 9.26: Assigned To Popup

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

New Call, Status: Planned, Assigned To: [kenix](#), Remove:  Remove. At the bottom, there is a pagination bar showing 'Page 1 of 1' and 'Displaying 1 to 1 of 1 items'." data-bbox="116 359 884 448"/>





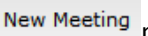
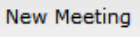

Module	Date	Subject	Status	Assigned To	Remove
 Call	08/19/2011 12:04 PM	<a href="#">New Call</a>	Planned	<a href="#">kenix</a>	 Remove

Figure 9.27: Activities Subpanel List New Call

To **cancel creating New Call**, click  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  button to **confirm**.

Clicking  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  menu at **Activities** subpanel. Once  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  button to create the New Meeting.

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

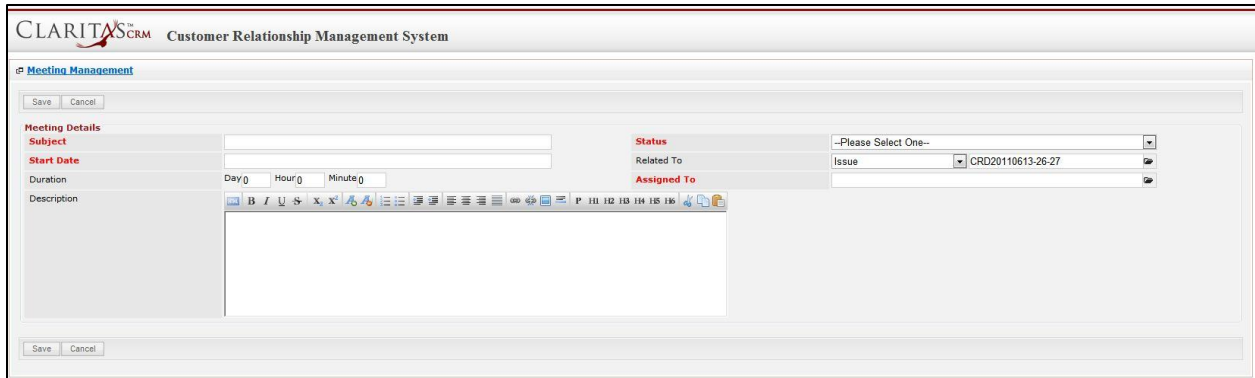


Figure 9.28: New Meeting Management Popup

- 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.

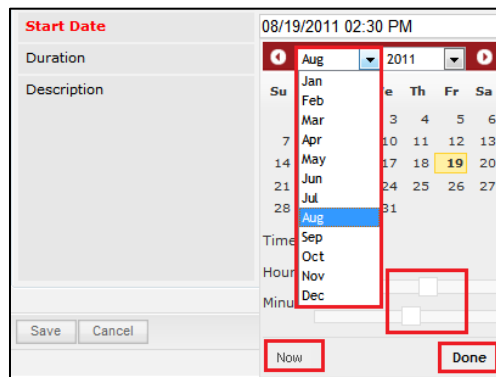


Figure 9.29: Start Date Time


- **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:

- 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)


User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	<a href="#">System</a>	<a href="#">Admin</a>	Administrator	Active	1	admin@netstermsc.com	<a href="#">Blank</a>
Farid	<a href="#">Farid</a>	<a href="#">Bin Faisal</a>	Administrator	Active		scyip@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
Irwan	<a href="#">Mohd Irwan</a>	<a href="#">Rizal</a>		Active	0122390079	admin@netstermsc.com	<a href="#">System Admin</a>
Razlan	<a href="#">Mohd Razlan</a>	<a href="#">Bin Abdul Rahma</a>	Administrator	Active		admin@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
Scyip	<a href="#">Blank</a>	<a href="#">kenix</a>	User	Active		scyip@netstermsc.com	<a href="#">Blank</a>

Figure 9.31: 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	<a href="#">New Meeting</a>	Not Held	<a href="#">kenix</a>	Remove
Call	08/19/2011 12:04 PM	<a href="#">New Call</a>	Planned	<a href="#">kenix</a>	Remove

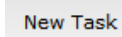
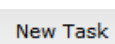

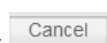
Figure 9.32: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click  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  button to **confirm**.

Clicking  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  menu at **Activities** subpanel. Once  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  button to create the New Task. Or click  menu to cancel creating New Task.

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

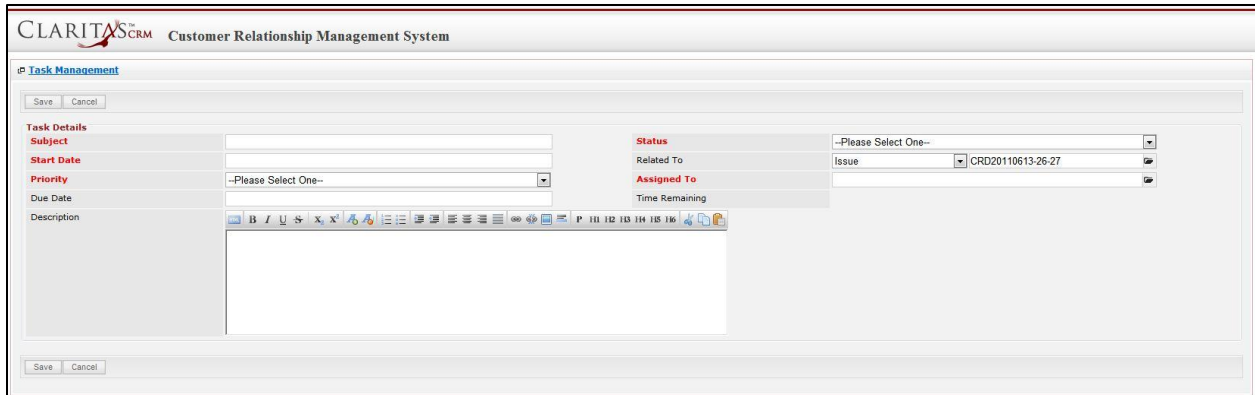


Figure 9.33: New Task Management Popup

- 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.

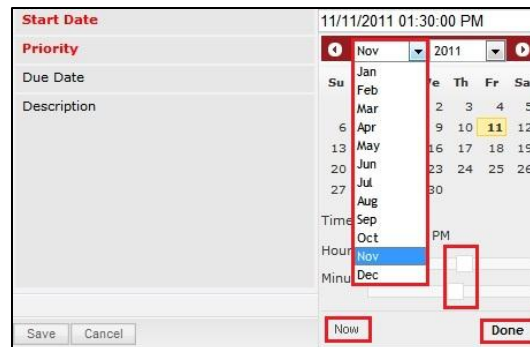


Figure 9.34: Start Date Time


- **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:

- 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)

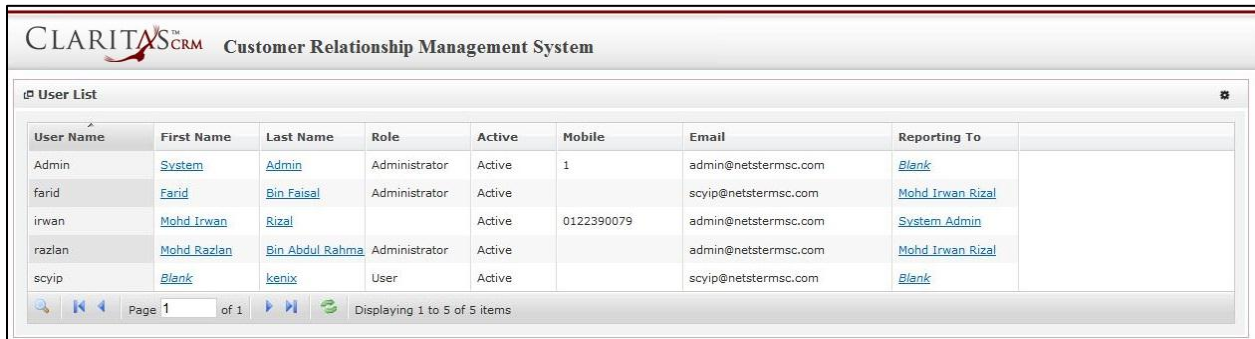


Figure 9.36: Assigned To Popup

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

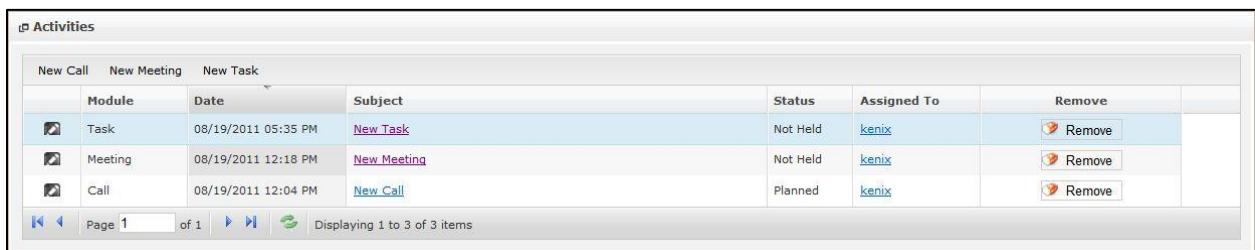




Figure 9.37: Activities Subpanel List New Task

To **cancel creating New Task**, click  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  button to **confirm**.

Clicking  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, .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.



Module	Date	Subject	Attachment	Remove
Note	08/19/2011 03:23 PM	<a href="#">New Note</a>		Remove


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.



Date	Title	Category	Status	Author
11/14/2011 02:51:17 PM	<a href="#">Out of Stock</a>	Pricing & Promotion > Out of stock	Active	FTSB Farid

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

**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.

The screenshot shows the Knowledge Base Listing page. The page displays a table with columns for Date, Title, Category, Status, and Author. The table contains 9 rows of data, including entries like 'Out of Stock', 'Account not tally', 'Unable to login', 'Bill missing', 'Duplicated bill', 'Wrong pricing', 'Voucher expired', 'Missing records', and 'Error message is displayed'. The page also shows a 'Page 1 of 1' indicator and 'Displaying 1 to 9 of 9 items'.

Date	Title	Category	Status	Author
11/14/2011 02:51:17 PM	<a href="#">Out of Stock</a>	Pricing & Promotion > Out of stock	Active	FTSB Farid
11/14/2011 02:50:32 PM	<a href="#">Account not tally</a>	Account & Billing	Active	FTSB Farid
11/14/2011 02:44:22 PM	<a href="#">Unable to login</a>	Technical & Support > System do	Active	Kenix Yip
06/28/2011 07:55:10 AM	<a href="#">Bill missing</a>	Account & Billing > Bill charge	Active	Kenix Yip
06/02/2011 02:23:06 AM	<a href="#">Duplicated bill</a>	Account & Billing > Waiver	Active	Gan Chin Kiat
06/02/2011 02:22:46 AM	<a href="#">Wrong pricing</a>	Pricing & Promotion > Price plan	Active	Kha Chun Fong
06/02/2011 02:22:00 AM	<a href="#">Voucher expired</a>	Pricing & Promotion > Voucher	Active	Gan Chin Kiat
06/02/2011 02:20:37 AM	<a href="#">Missing records</a>	Technical & Support > Data missir	Active	Gan Chin Kiat
03/10/2011 11:20:43 AM	<a href="#">Error message is displayed</a>	Technical & Support > System do	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	
<input type="checkbox"/>	11/14/2011 02:51:17 PM	<a href="#">Out of Stock</a>	Pricing & Promotion > Out of stock	Active	FTSB Farid	
<input type="checkbox"/>	11/14/2011 02:50:32 PM	<a href="#">Account not tally</a>	Account & Billing	Active	FTSB Farid	
<input type="checkbox"/>	11/14/2011 02:44:22 PM	<a href="#">Unable to login</a>	Technical & Support > System do	Active	Kenix Yip	
<input type="checkbox"/>	06/28/2011 07:55:10 AM	<a href="#">Bill missing</a>	Account & Billing > Bill charge	Active	Kenix Yip	
<input type="checkbox"/>	06/02/2011 02:23:06 AM	<a href="#">Duplicated bill</a>	Account & Billing > Waiver	Active	Gan Chin Kiat	
<input type="checkbox"/>	06/02/2011 02:22:46 AM	<a href="#">Wrong pricing</a>	Pricing & Promotion > Price plan	Active	Kha Chun Fong	
<input type="checkbox"/>	06/02/2011 02:22:00 AM	<a href="#">Voucher expired</a>	Pricing & Promotion > Voucher	Active	Gan Chin Kiat	
<input type="checkbox"/>	06/02/2011 02:20:37 AM	<a href="#">Missing records</a>	Technical & Support > Data missir	Active	Gan Chin Kiat	
<input type="checkbox"/>	03/10/2011 11:20:43 AM	<a href="#">Error message is displayed</a>	Technical & Support > System do	Active	Kelvin Leow	

Page 1 of 1 Displaying 1 to 9 of 9 items

Figure 10.3: Knowledge Base ID Hyperlink

After clicking the [Knowledge Base ID](#) 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**.

Knowledge Base > Unable to login			
<input type="button" value="Edit"/> <input type="button" value="Cancel"/> <input type="button" value="Copy New"/>			
<b>Knowledge Base</b>			
Title	Unable to login	Status	Active
Category	Technical & Support > System downtime	Author	<a href="#">Kenix Yip</a>
Description	some description		
<b>System Information</b>			
Created Date	11/14/2011 02:44:22 PM	Created By	FTSB\scyip
Last Updated Date	11/14/2011 04:05:16 PM	Last Updated By	FTSB\scyip
Action Date		Action By	
<b>Activities</b>			
<b>History</b>			

Figure 10.4: Knowledge Base Management Detail Page

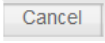
To copy the entire record and save as a new record, click  button at **User Maintenance Detail** page.

To create a new Knowledge Base, click at  menu at the top of the Knowledge Base Listing.

Knowledge Base		
Actions	<input type="button" value="Create New"/>	Selected: 0

Figure 10.5: Create New Knowledge Base Menu

After clicking  menu, page will navigate to **Knowledge Base Management** page. Enter the relevant details and click  button to save the changes and navigates to **Knowledge Base**

Management Detail page or click  button to cancel creating and navigates back to the Knowledge Base Listing page.

**Related Topics:** See [“Create New Knowledge Base”](#)

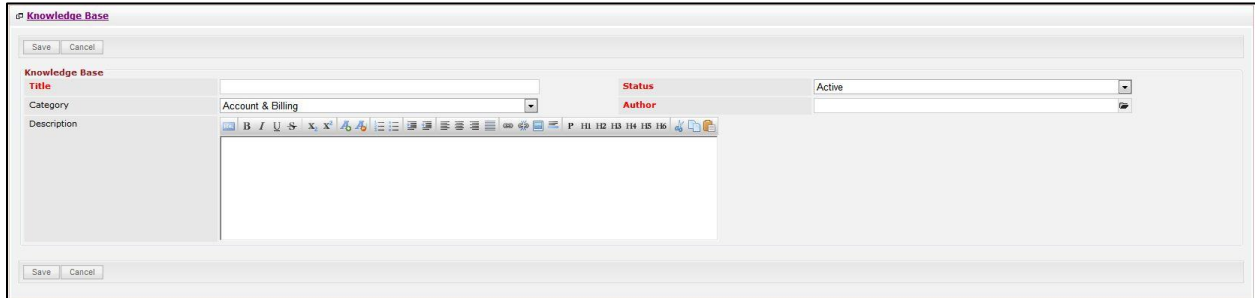


Figure 10.6: Knowledge Base Management Create New Page

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

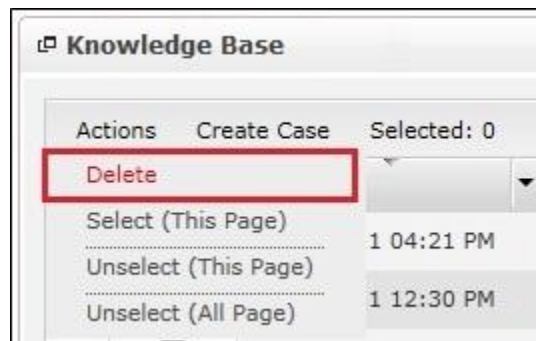


Figure 10.7: Action > Delete Menu

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)**.

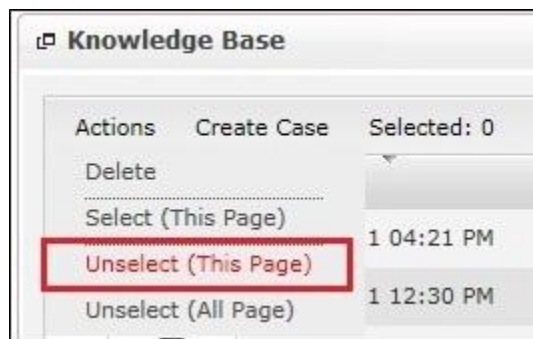


Figure 10.10: Actions > Unselect (This Page) Menu

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

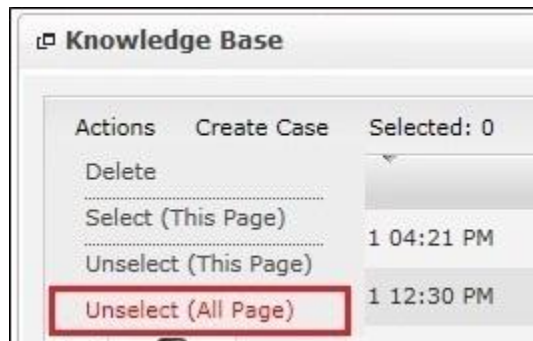







Figure 10.11: Actions > Unselect (All Pages) Menu




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

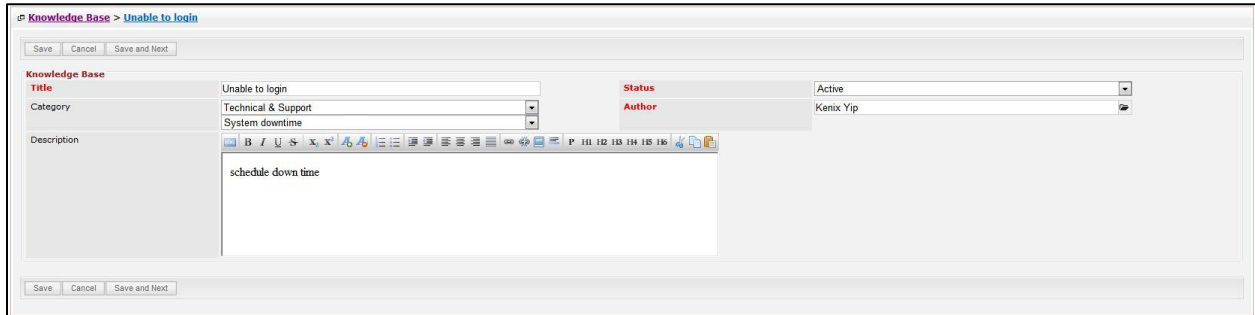
To go to the Previous Page of the listing, click at the **Previous Page**  button.

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


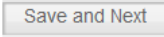

To go to the Last Page of the listing, click at the **Last Page**  button.

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**.



The screenshot shows a web form for creating a Knowledge Base. The fields are as follows:

Field	Value
<b>Title</b>	Scheduled Maintenance
Category	Technical & Support
	System downtime
Description	Scheduled maintenance will be carried out from 10am to 20pm on 20 November 2011. Kindly come back after that period. Sorry for any inconvenience caused.
<b>Status</b>	Active
<b>Author</b>	Kenix Yip


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:
  - 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**



The screenshot shows the Author field with the text 'keni' entered. A dropdown menu is open, showing the suggestion 'Kenix Yip'.

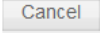
Figure 10.14: Author Field Auto Complete Dropdown

- Click at the  button to open a new popup containing the list of all Users. (Click at the User hyperlink to select the Author)





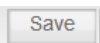
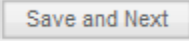
User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	System	Admin	Administrator	Active	1	admin@netstermsc.com	Blank
farid	Farid	Bin Faisal	Administrator	Active		scyip@netstermsc.com	Mohd Irwan Rizal
irwan	Mohd Irwan	Rizal	Administrator	Active	0122390079	admin@netstermsc.com	System 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  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  button in **Knowledge Base Management Detail** page. After clicking the **Edit**  button or  button, page will navigate to the **Knowledge Base Management Edit** page. Edit the relevant details and click  button to save the changes and navigates back to **Knowledge Base Management Detail** page or click  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)

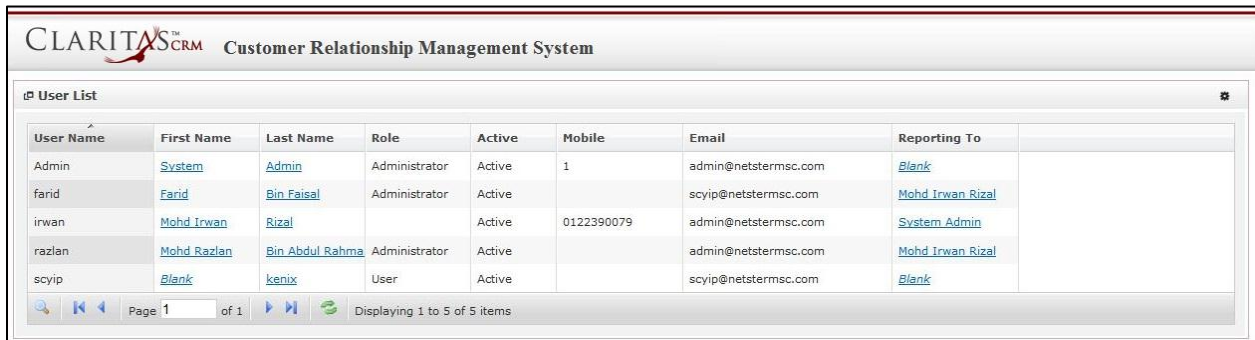
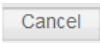


Figure 10.18: Author Popup

To cancel editing Knowledge Base, click  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:
  - 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)


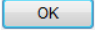



**Figure 10.22: Assigned To Popup**

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

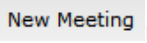
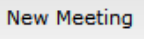



**Figure 10.23: Activities Subpanel List New Call**

To **cancel creating New Call**, click  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  button to **confirm**.

Clicking  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  menu at **Activities** subpanel. Once  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  button to create the New Meeting.

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

The screenshot shows the 'Meeting Management' popup in the CLARITAS CRM system. The form is titled 'Meeting Management' and has a 'Save' and 'Cancel' button at the top left. The form is divided into several sections: 'Meeting Details', 'Subject', 'Start Date', 'Duration', 'Description', 'Status', 'Related To', and 'Assigned To'. The 'Subject', 'Start Date', 'Status', and 'Assigned To' fields are highlighted in red, indicating they are compulsory. The 'Start Date' field is currently empty, and the 'Related To' field is set to 'Knowledge Base'. The 'Status' field is set to 'Scheduled Maintenance'. The form also includes a 'Save' and 'Cancel' button at the bottom left.

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.

The screenshot shows the 'Start Date' selection dialog. The dialog is titled 'Start Date' and shows the date '08/19/2011 02:30 PM'. The dialog includes a calendar for August 2011 with the date 19th highlighted. The time is set to 02:30 PM. The dialog also includes fields for 'Duration' and 'Description', and buttons for 'Save', 'Cancel', 'Now', and 'Done'. The 'Now' and 'Done' buttons are highlighted in red.


Figure 10.25: Start Date Time

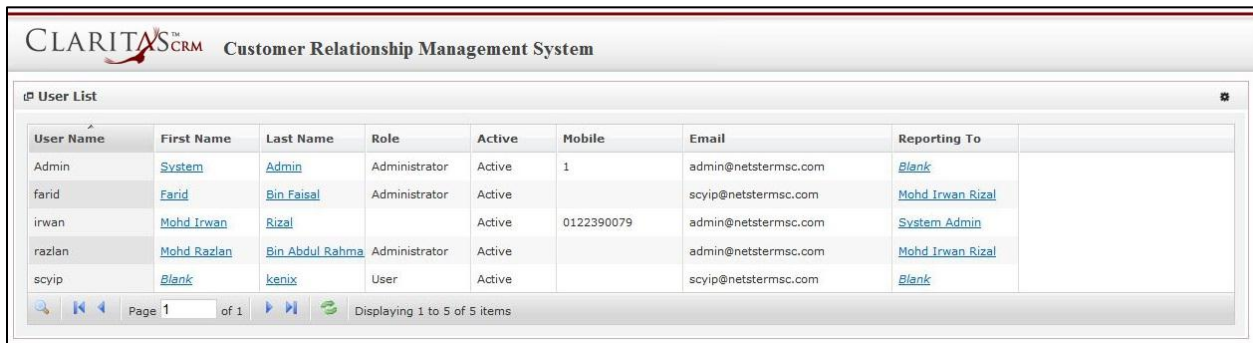
- **Assigned To** field is to assign a User to in charge of the Meeting for the related **Knowledge Base**. There are two ways of entering the **Assigned To** field:

- 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**



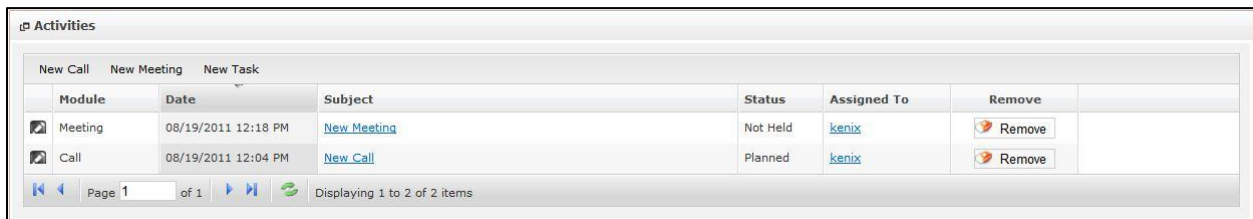
**Figure 10.26: Assigned To Field Auto Complete Dropdown**

- 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  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  button to **confirm**.

Clicking  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.*

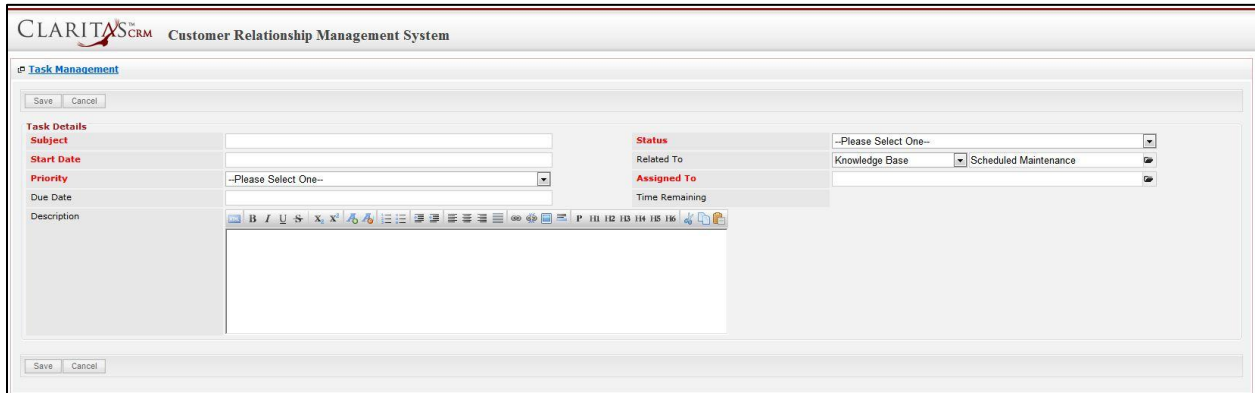


Figure 10.29: New Task Management Popup

- 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.

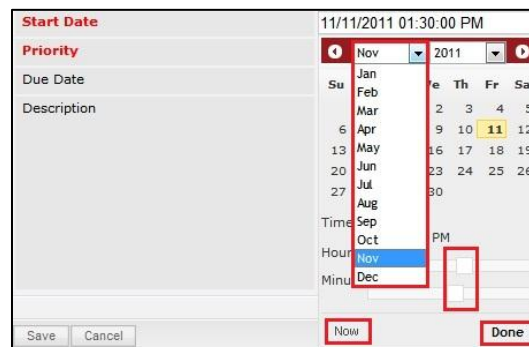


Figure 10.30: Start Date Time

- **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:

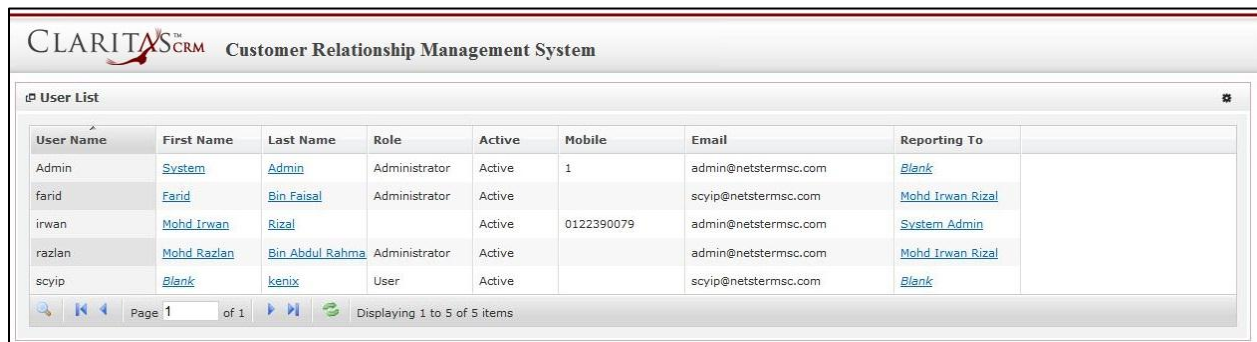
- Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)

**OR**



**Figure 10.31: Assigned To Field Auto Complete Dropdown**

- 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)


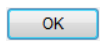


**Figure 10.32: Assigned To Popup**

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



**Figure 10.33: Activities Subpanel List New Task**

To **cancel creating New Task**, click  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  button to **confirm**.

Clicking  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

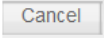

- Compulsory fields: **Subject**, and **Related To**.
- **Related To** field will auto populate the name of the related **Knowledge Base**.
- **Attachment** field allow file extensions are as below (format that is not stated are not allowed to be uploaded):
  - **Documents:** .doc, .docx, .xls, .xlsx, .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  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.

## 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.

Start Date	Subject	Duration	Status	Assigned To	Related To
08/10/2011 12:00:00 AM	<a href="#">CRM Meeting</a>	0 Day 0 Hour 0 Minute	Planned	<a href="#">Kenix Yip</a>	<a href="#">Netster MSC Sdn Bhd</a>
07/06/2011 10:00:00 AM	<a href="#">Branch Meeting</a>	0 Day 0 Hour 0 Minute	Held	<a href="#">Kenix Yip</a>	<a href="#">Netster CRM</a>
07/01/2011 03:00:00 PM	<a href="#">User Meeting</a>	0 Day 0 Hour 0 Minute	Planned	<a href="#">Kenix Yip</a>	<a href="#">Kenix Yip</a>
06/30/2011 11:00:00 AM	<a href="#">Case Meeting</a>	0 Day 0 Hour 0 Minute	Planned	<a href="#">Kenix Yip</a>	<a href="#">CRD20110627-72</a>
06/30/2011 09:00:00 AM	<a href="#">Branch Meeting</a>	0 Day 0 Hour 0 Minute	Planned	<a href="#">Kenix Yip</a>	<a href="#">Carlsberg Malaysia - Johor Office</a>
06/29/2011 09:00:00 AM	<a href="#">Company Test Meeting</a>	0 Day 0 Hour 0 Minute	Held	<a href="#">Kenix Yip</a>	<a href="#">Company Test</a>
06/29/2011 12:00:00 AM	<a href="#">Meeting Test</a>	0 Day 0 Hour 0 Minute	Not Held	<a href="#">Kenix Yip</a>	<a href="#">Company Test</a>
06/29/2011 12:00:00 AM	<a href="#">Product Meeting</a>	0 Day 0 Hour 0 Minute	Held	<a href="#">Kenix Yip</a>	

Figure 11.2: Meeting Listing

To view the Meeting Details, click at the Subject hyperlink in Subject column.

Start Date	Subject	Duration	Status	Assigned To	Related To
08/10/2011 12:00:00 AM	<a href="#">CRM Meeting</a>	0 Day 0 Hour 0 Minute	Planned	<a href="#">Kenix Yip</a>	<a href="#">Netster MSC Sdn Bhd</a>
07/06/2011 10:00:00 AM	<a href="#">Branch Meeting</a>	0 Day 0 Hour 0 Minute	Held	<a href="#">Kenix Yip</a>	<a href="#">Netster CRM</a>
07/01/2011 03:00:00 PM	<a href="#">User Meeting</a>	0 Day 0 Hour 0 Minute	Planned	<a href="#">Kenix Yip</a>	<a href="#">Kenix Yip</a>
06/30/2011 11:00:00 AM	<a href="#">Case Meeting</a>	0 Day 0 Hour 0 Minute	Planned	<a href="#">Kenix Yip</a>	<a href="#">CRD20110627-72</a>
06/30/2011 09:00:00 AM	<a href="#">Branch Meeting</a>	0 Day 0 Hour 0 Minute	Planned	<a href="#">Kenix Yip</a>	<a href="#">Carlsberg Malaysia - Johor Office</a>
06/29/2011 09:00:00 AM	<a href="#">Company Test Meeting</a>	0 Day 0 Hour 0 Minute	Held	<a href="#">Kenix Yip</a>	<a href="#">Company Test</a>
06/29/2011 12:00:00 AM	<a href="#">Meeting Test</a>	0 Day 0 Hour 0 Minute	Not Held	<a href="#">Kenix Yip</a>	<a href="#">Company Test</a>
06/29/2011 12:00:00 AM	<a href="#">Product Meeting</a>	0 Day 0 Hour 0 Minute	Held	<a href="#">Kenix Yip</a>	

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”](#)

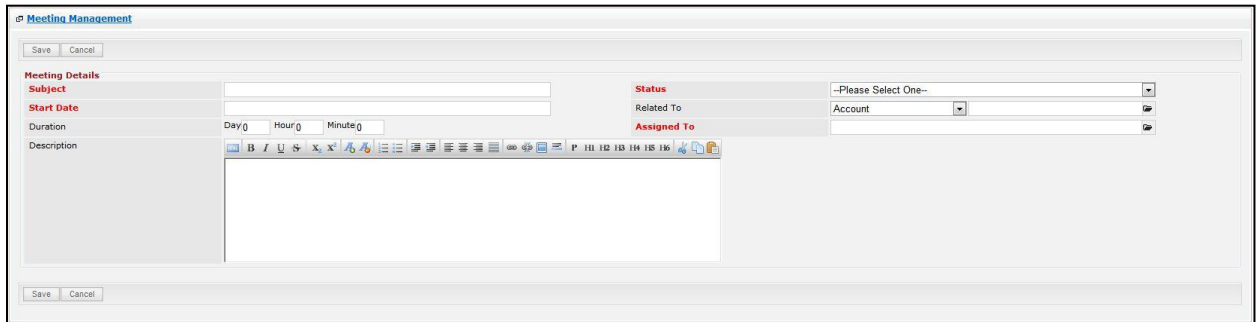


Figure 11.6: Meeting Management Create New Page

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

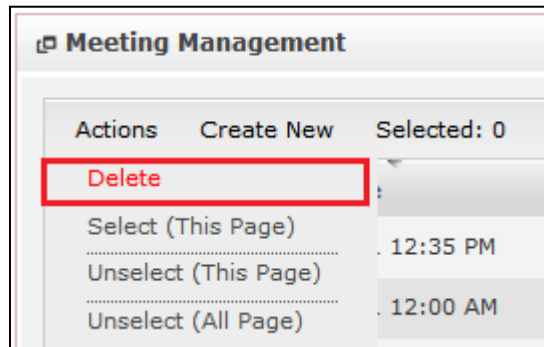


Figure 11.7: Action > Delete Menu

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)**.

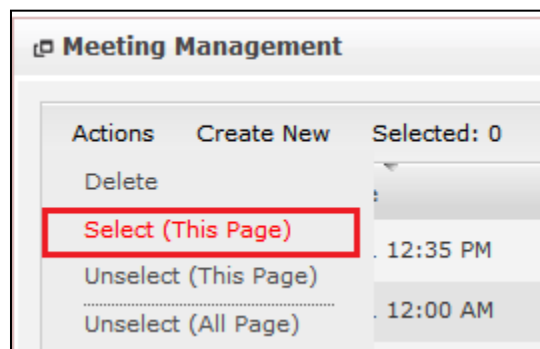


Figure 11.9: Actions > Select (This Page) Menu

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

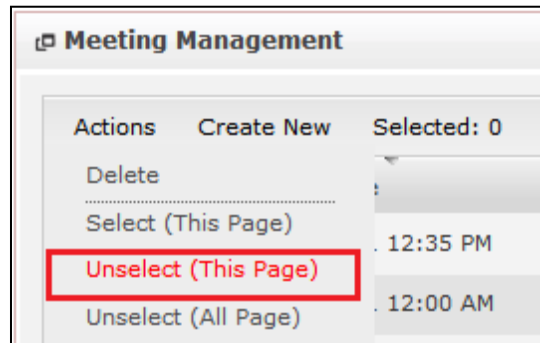


Figure 11.10: Actions > Unselect (This Page) Menu

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

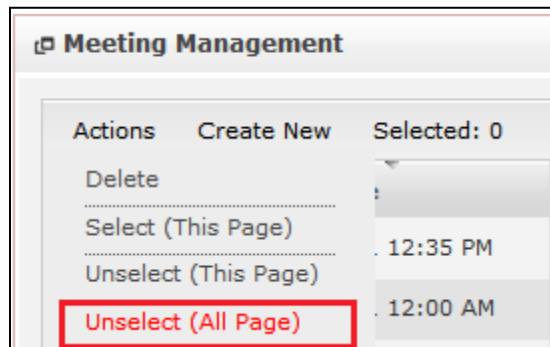






Figure 11.11: Actions > Unselect (All Pages) Menu


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.

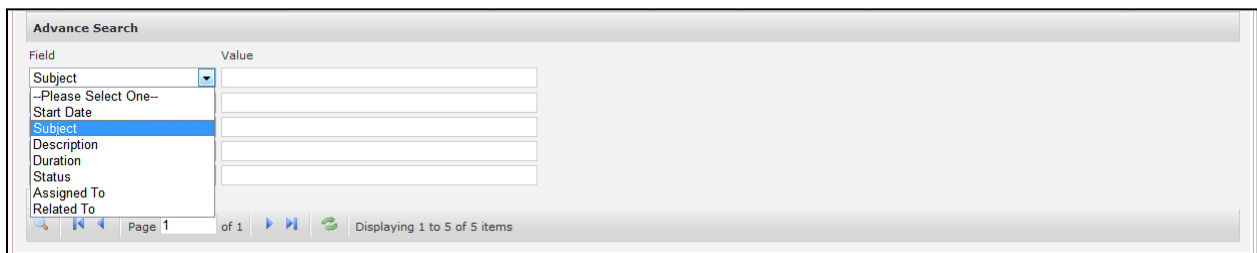




Figure 11.12: Meeting Advance Search

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.

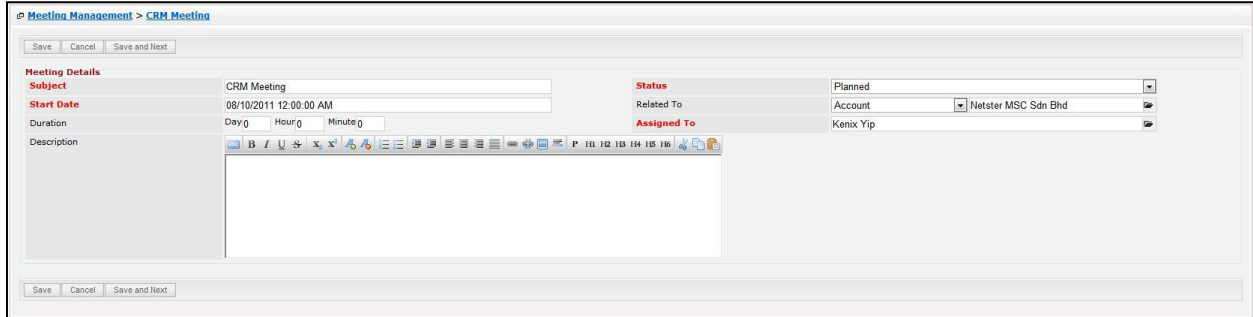


Figure 11.13: Meeting Management Edit Page

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**.

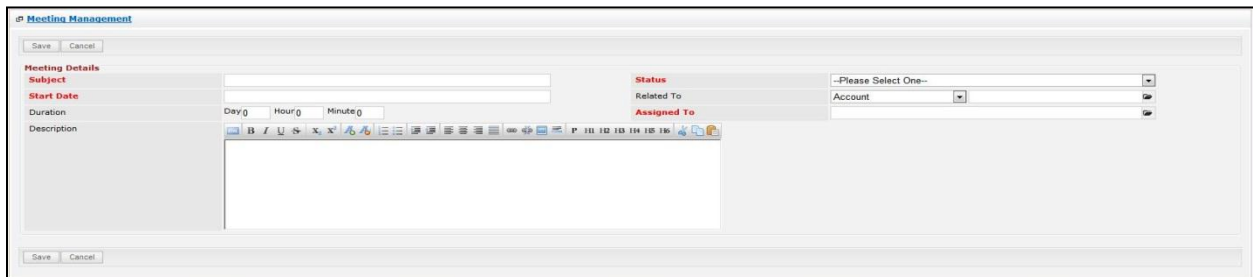


Figure 11.14: Create New Meeting – Meeting Details

- **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.

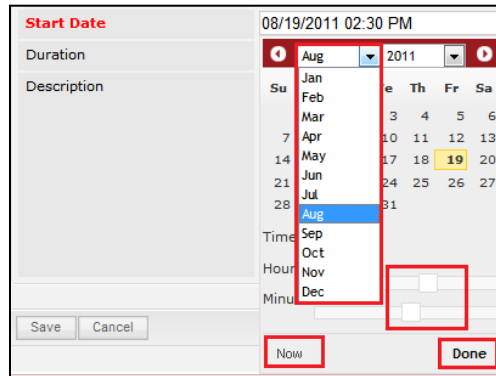


Figure 11.15: Start Date Time


- **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)

CLARITAS <sup>SM</sup> CRM Customer Relationship Management System							
User List							
User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	<a href="#">System</a>	<a href="#">Admin</a>	Administrator	Active	1	admin@netstermsc.com	<a href="#">Blank</a>
farid	<a href="#">Farid</a>	<a href="#">Bin Faisal</a>	Administrator	Active		scyip@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
irwan	<a href="#">Mohd Irwan</a>	<a href="#">Rizal</a>		Active	0122390079	admin@netstermsc.com	<a href="#">System Admin</a>
razlan	<a href="#">Mohd Razlan</a>	<a href="#">Bin Abdul Rahma</a>	Administrator	Active		admin@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
scyip	<a href="#">Blank</a>	<a href="#">kenix</a>	User	Active		scyip@netstermsc.com	<a href="#">Blank</a>


Page 1 of 1    Displaying 1 to 5 of 5 items

Figure 11.17: Assigned To Popup

To cancel creating New Meeting, click  button. Page will navigate back to Meeting Listing page.


## Edit Meeting

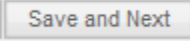
To edit meeting details, click at the **Collaboration > Meeting** menu at the Main Menu bar. Click at the

**Edit**  button in **Meeting Listing** page or click at the [Subject](#) hyperlink in **Meeting Listing** page then

click the  button in **Meeting Management Detail** page. After clicking the **Edit**  button or

 button, page will navigate to **Meeting Management** page. Edit the relevant details and click

 button to save the changes and navigates back to **Meeting Management Detail** page or click

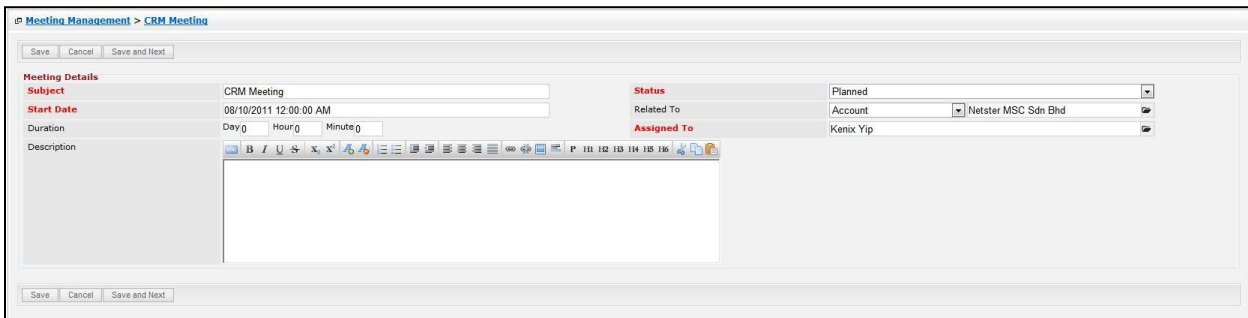
 button to save the changes and navigates to the **Meeting Management Edit page** for the next record.

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**.



Meeting Management > CRM Meeting

Save Cancel Save and Next

**Meeting Details**

**Subject** CRM Meeting **Status** Planned

**Start Date** 08/10/2011 12:00:00 AM **Related To** Account Netster MSC Sdn Bhd

Duration Day 0 Hour 0 Minute 0 **Assigned To** Kenix Yip

Description

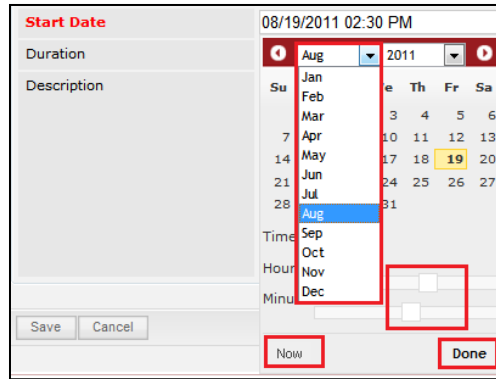
Save Cancel Save and Next

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:
  - 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**

- 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<sup>SM</sup> CRM Customer Relationship Management System

User List

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

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 11.21: Assigned To Popup

To cancel editing New Meeting, click  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.

The screenshot shows the Call Management page with a table listing call records. The table has columns for Start Date, Subject, Duration, Status, Assigned To, and Related To. The 'Subject' column contains hyperlinks for each call record.

Start Date	Subject	Duration	Status	Assigned To	Related To
08/30/2011 11:00:00 AM	<a href="#">Centium Call2</a>	0 Day 2 Hour 0 Minute	Held	<a href="#">Kelvin Leow</a>	
08/24/2011 12:00:00 AM	<a href="#">Centium Call5</a>	0 Day 0 Hour 0 Minute	Held	<a href="#">Brandon Chang</a>	<a href="#">Centium Software Sdn Bhd</a>
08/12/2011 12:00:00 AM	<a href="#">new call</a>	0 Day 0 Hour 0 Minute	Planned	<a href="#">Kenix Yip</a>	<a href="#">testingCRD20110811-118</a>
08/03/2011 12:00:00 AM	<a href="#">Centium Call</a>	1 Day 0 Hour 0 Minute	Held	<a href="#">Kelvin Leow</a>	<a href="#">Centium Software Sdn Bhd</a>
07/06/2011 11:00:00 AM	<a href="#">Branch Call</a>	0 Day 0 Hour 0 Minute	Planned	<a href="#">Kenix Yip</a>	<a href="#">Tester Branch</a>
07/01/2011 08:00:00 PM	<a href="#">Account Call</a>	0 Day 0 Hour 0 Minute	Planned	<a href="#">Kenix Yip</a>	<a href="#">Company Test</a>

Figure 12.2: Call Listing

To view the Call Details, click at the Subject hyperlink in Subject column.

The screenshot shows the Call Management page with the 'Subject' hyperlink in the first row highlighted with a red box. The table structure is identical to Figure 12.2.

Start Date	Subject	Duration	Status	Assigned To	Related To
08/30/2011 11:00:00 AM	<a href="#">Centium Call2</a>	0 Day 2 Hour 0 Minute	Held	<a href="#">Kelvin Leow</a>	
08/24/2011 12:00:00 AM	<a href="#">Centium Call5</a>	0 Day 0 Hour 0 Minute	Held	<a href="#">Brandon Chang</a>	<a href="#">Centium Software Sdn Bhd</a>
08/12/2011 12:00:00 AM	<a href="#">new call</a>	0 Day 0 Hour 0 Minute	Planned	<a href="#">Kenix Yip</a>	<a href="#">testingCRD20110811-118</a>
08/03/2011 12:00:00 AM	<a href="#">Centium Call</a>	1 Day 0 Hour 0 Minute	Held	<a href="#">Kelvin Leow</a>	<a href="#">Centium Software Sdn Bhd</a>
07/06/2011 11:00:00 AM	<a href="#">Branch Call</a>	0 Day 0 Hour 0 Minute	Planned	<a href="#">Kenix Yip</a>	<a href="#">Tester Branch</a>
07/01/2011 08:00:00 PM	<a href="#">Account Call</a>	0 Day 0 Hour 0 Minute	Planned	<a href="#">Kenix Yip</a>	<a href="#">Company Test</a>

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.

Call Management > Branch Call

Edit Cancel Copy New

**Call Details**

Subject	Branch Call	Status	Planned
Start Date	07/06/2011 11:00:00 AM	Related To	<a href="#">Tester Branch</a>
Duration	0 Day 0 Hour 0 Minute	Assigned To	<a href="#">Kenix Yip</a>
Description			

**System Information**

Created Date	07/05/2011 03:40:35 PM	Created By	ftb\scvip
Last Updated Date	07/05/2011 04:32:42 PM	Last Updated By	ftb\scvip

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.

Call Management

Actions **Create New** Selected: 0

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”](#)

Call Management

Save Cancel

**Call Details**

Subject:

Start Date:

Duration: Day:  Hour:  Minute:

Description:

Status:

Related To:

Assigned To:

Save Cancel

Figure 12.6: Call Management Create New Page

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

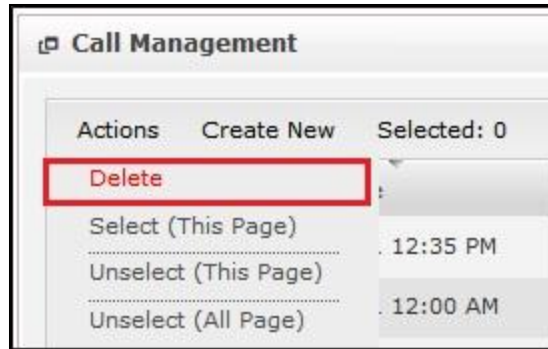


Figure 12.7: Action > Delete Menu

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)**.

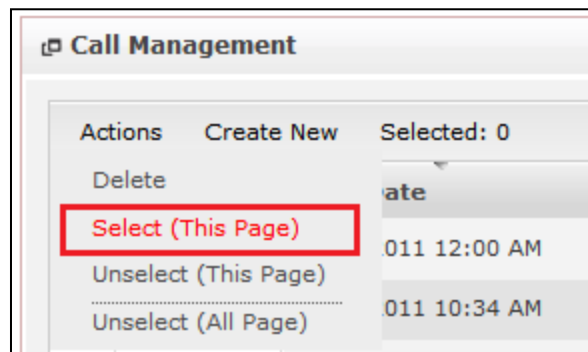


Figure 12.9: Actions > Select (This Page) Menu

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

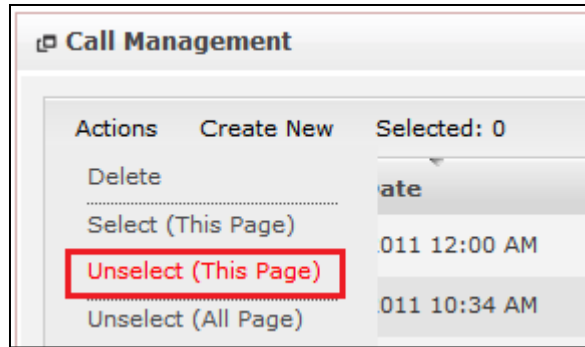


Figure 12.10: Actions > Unselect (This Page) Menu

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

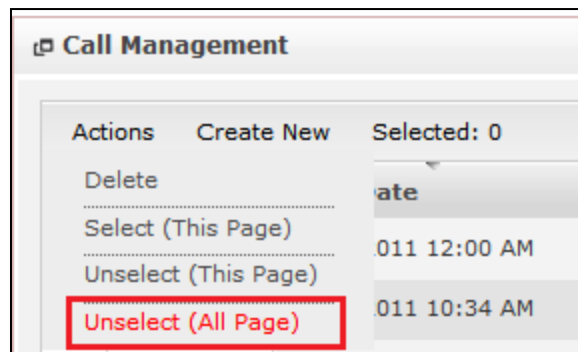






Figure 12.11: Actions > Unselect (All Pages) Menu


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.

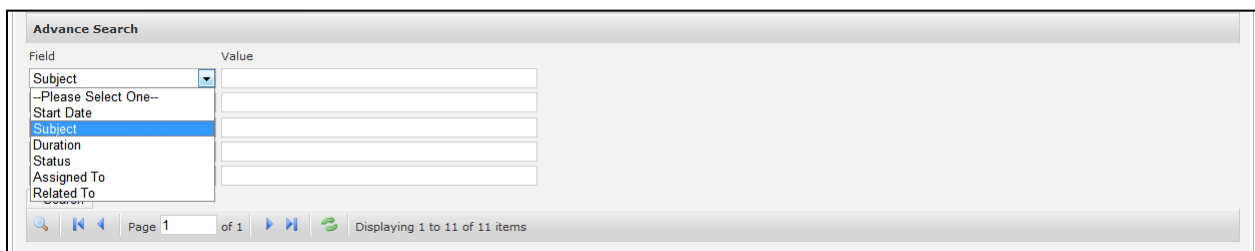


Figure 12.12: Call Advance Search



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**.

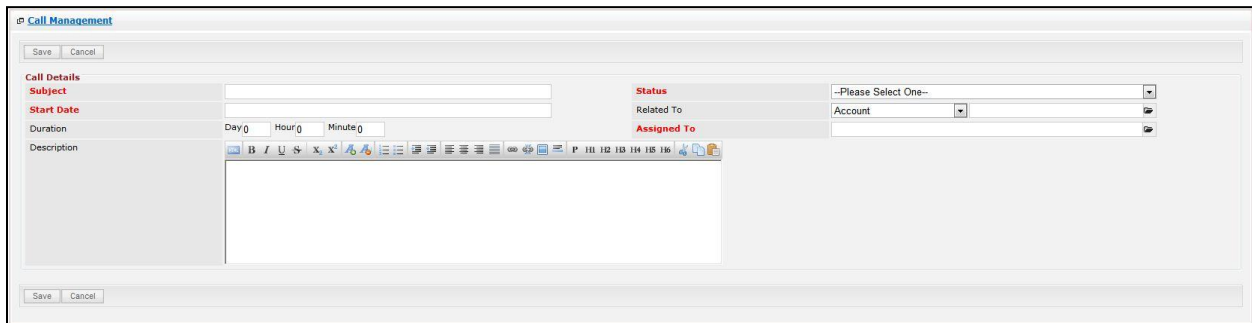


Figure 12.14: Create New Call – Call Details

- **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.

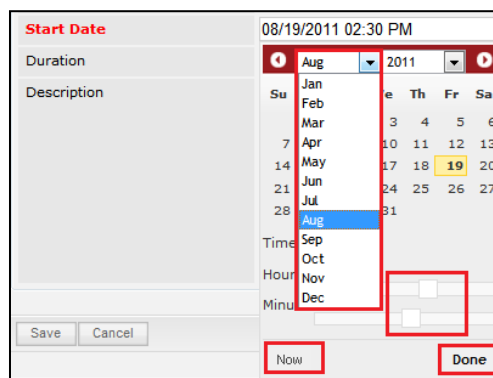


Figure 12.15: Start Date Time

- **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:

- 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

- 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)

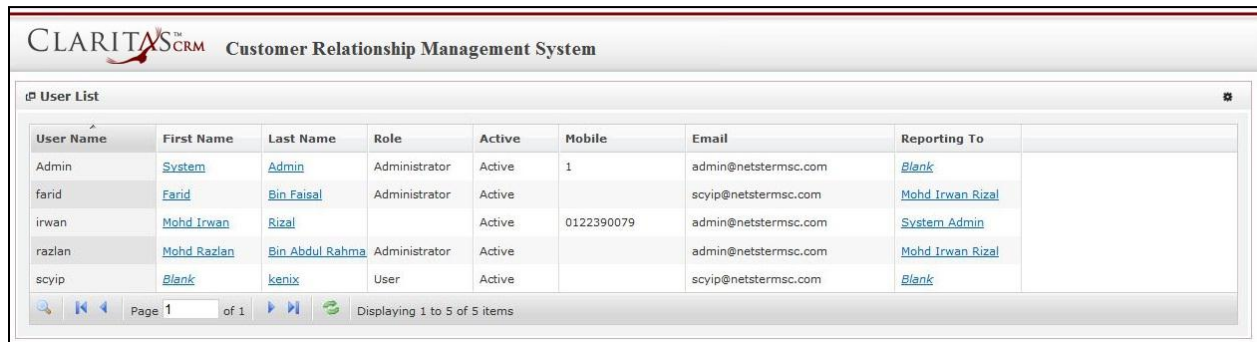





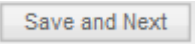


Figure 12.17: Assigned To Popup

To cancel creating New Call, click  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 Subject hyperlink in **Call Listing** page then click the  button in **Call Management Detail** page. After clicking the **Edit**  button or  button, page will navigate to **Call Management** page. Edit the relevant details and click  button to save the changes and navigates back to **Call Management Detail** page or click  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**.

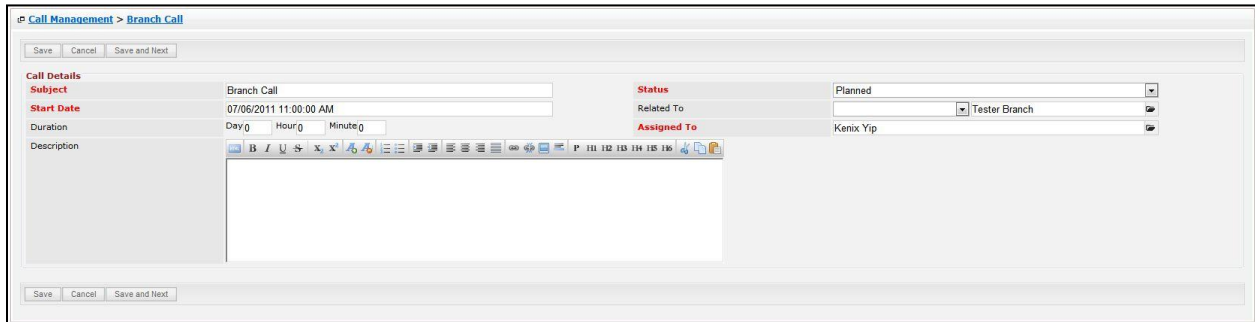


Figure 12.18: Edit Call – Call Details

- **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.

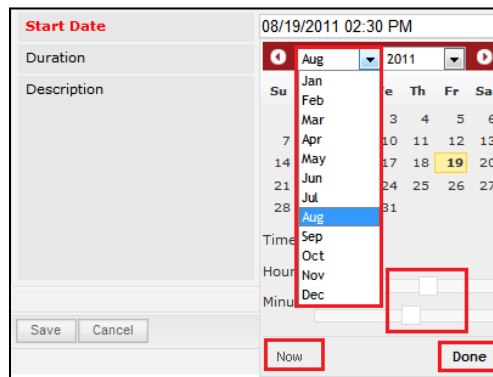



Figure 12.19: Start Date Time

- **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:
  - 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)

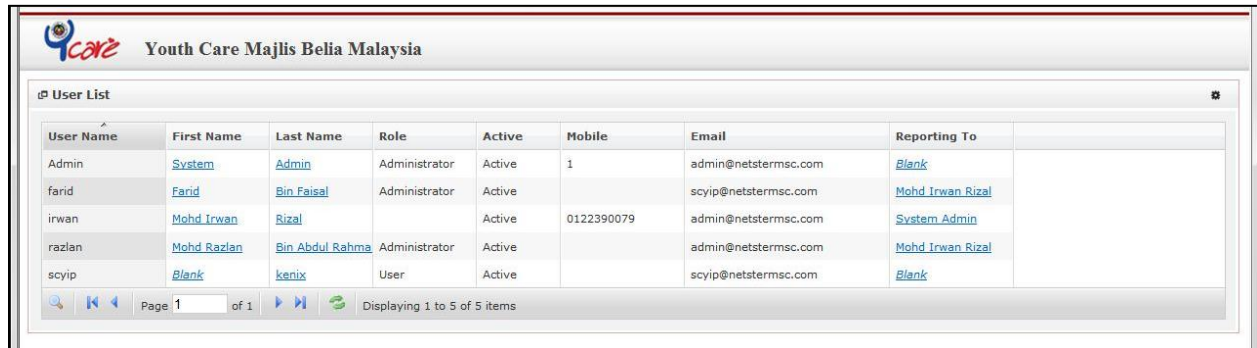



Figure 12.21: Assigned To Popup

To cancel editing New Call, click  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.

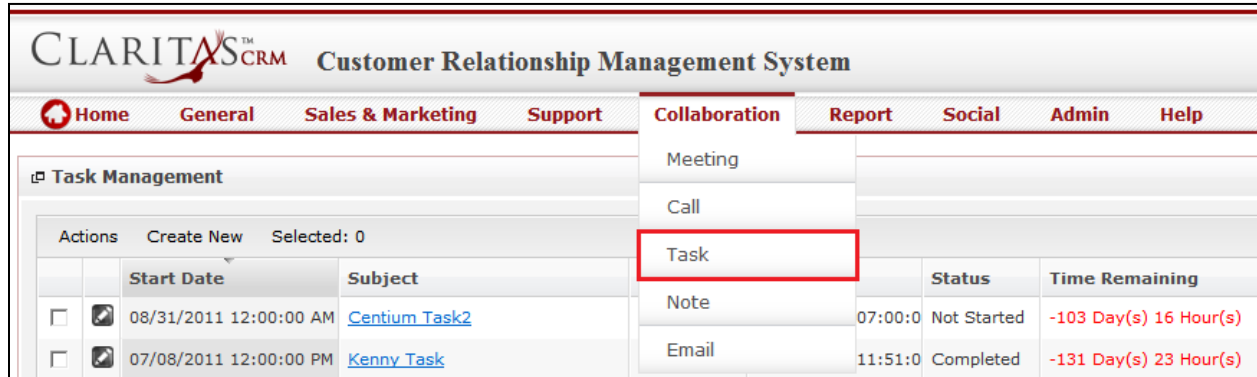


Figure 13.1: Task Menu in Main Menu

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

Start Date	Subject	Priority	Due Date	Status	Time Remaining	Assigned To	Related To
08/31/2011 12:00:00 AM	<a href="#">Centium_Task2</a>	Medium	08/03/2011 07:00:0	Not Started	-103 Day(s) 17 Hour(s)	<a href="#">Kelvin Leow</a>	<a href="#">Centium Software Sdn Bhd</a>
07/08/2011 12:00:00 PM	<a href="#">Kenny_Task</a>	High	07/06/2011 11:51:0	Completed	-132 Day(s) 0 Hour(s)	<a href="#">Kenix Yip</a>	<a href="#">Kenny Yip</a>
07/08/2011 09:00:00 AM	<a href="#">Contact_Task</a>	High	07/06/2011 01:26:0	In Progress	-131 Day(s) 22 Hour(s)	<a href="#">Kenix Yip</a>	<a href="#">CRD20110627-70</a>
07/07/2011 12:00:00 PM	<a href="#">Branch_Task</a>	High	07/06/2011 10:49:0	In Progress	-132 Day(s) 1 Hour(s)	<a href="#">Kenix Yip</a>	<a href="#">Tester Branch</a>
07/07/2011 12:00:00 PM	<a href="#">Account_Task</a>	Medium	07/06/2011 04:31:0	Not Started	-131 Day(s) 19 Hour(s)	<a href="#">Kenix Yip</a>	<a href="#">Company_Test</a>
07/01/2011 12:00:00 AM	<a href="#">User_task</a>	High		In Progress		<a href="#">Kenix Yip</a>	<a href="#">Kenix Yip</a>
06/30/2011 02:00:00 PM	<a href="#">Branch_Task</a>	Medium	06/29/2011 12:00:0	Not Started	-139 Day(s) 12 Hour(s)	<a href="#">Kelvin Leow</a>	<a href="#">CRD20110630-101</a>
06/30/2011 01:00:00 PM	<a href="#">Case_Task</a>	High	07/29/2011 06:00:0	Not Started	-108 Day(s) 18 Hour(s)	<a href="#">Kenix Yip</a>	
06/30/2011 11:00:00 AM	<a href="#">Product_Task</a>	High		Not Started		<a href="#">Kenix Yip</a>	
06/28/2011 12:00:00 AM	<a href="#">Testing_Task</a>	High		Not Started		<a href="#">Kenix Yip</a>	<a href="#">CRD20110627-71</a>

Figure 13.2: Task Listing

To view the Task Details, click at the Subject hyperlink in Subject column.

Start Date	Subject	Priority	Due Date	Status	Time Remaining	Assigned To	Related To
08/31/2011 12:00:00 AM	<a href="#">Centium_Task2</a>	Medium	08/03/2011 07:00:0	Not Started	-103 Day(s) 17 Hour(s)	<a href="#">Kelvin Leow</a>	<a href="#">Centium Software Sdn Bhd</a>
07/08/2011 12:00:00 PM	<a href="#">Kenny_Task</a>	High	07/06/2011 11:51:0	Completed	-132 Day(s) 0 Hour(s)	<a href="#">Kenix Yip</a>	<a href="#">Kenny Yip</a>
07/08/2011 09:00:00 AM	<a href="#">Contact_Task</a>	High	07/06/2011 01:26:0	In Progress	-131 Day(s) 22 Hour(s)	<a href="#">Kenix Yip</a>	<a href="#">CRD20110627-70</a>
07/07/2011 12:00:00 PM	<a href="#">Branch_Task</a>	High	07/06/2011 10:49:0	In Progress	-132 Day(s) 1 Hour(s)	<a href="#">Kenix Yip</a>	<a href="#">Tester Branch</a>
07/07/2011 12:00:00 PM	<a href="#">Account_Task</a>	Medium	07/06/2011 04:31:0	Not Started	-131 Day(s) 19 Hour(s)	<a href="#">Kenix Yip</a>	<a href="#">Company_Test</a>
07/01/2011 12:00:00 AM	<a href="#">User_task</a>	High		In Progress		<a href="#">Kenix Yip</a>	<a href="#">Kenix Yip</a>
06/30/2011 02:00:00 PM	<a href="#">Branch_Task</a>	Medium	06/29/2011 12:00:0	Not Started	-139 Day(s) 12 Hour(s)	<a href="#">Kelvin Leow</a>	<a href="#">CRD20110630-101</a>
06/30/2011 01:00:00 PM	<a href="#">Case_Task</a>	High	07/29/2011 06:00:0	Not Started	-108 Day(s) 18 Hour(s)	<a href="#">Kenix Yip</a>	
06/30/2011 11:00:00 AM	<a href="#">Product_Task</a>	High		Not Started		<a href="#">Kenix Yip</a>	
06/28/2011 12:00:00 AM	<a href="#">Testing_Task</a>	High		Not Started		<a href="#">Kenix Yip</a>	<a href="#">CRD20110627-71</a>

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.

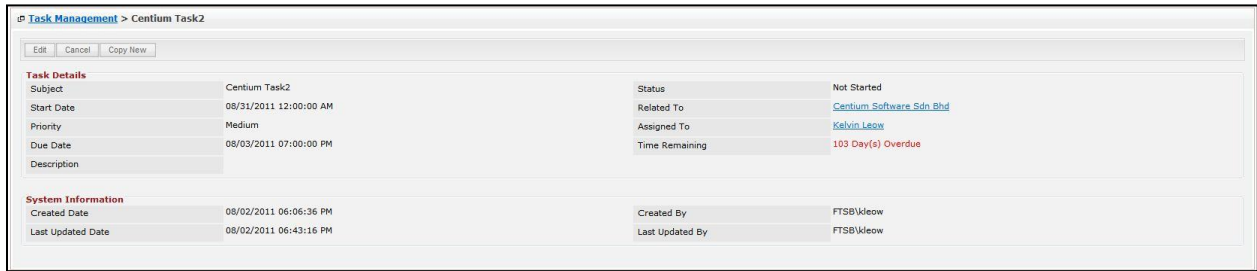


Figure 13.4: Task Management Detail Page

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”](#)

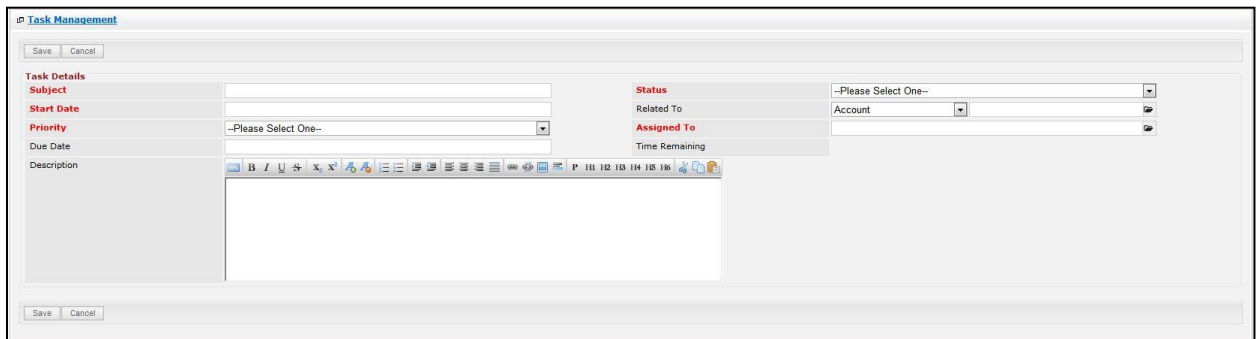


Figure 13.6: Task Management Create New Page

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

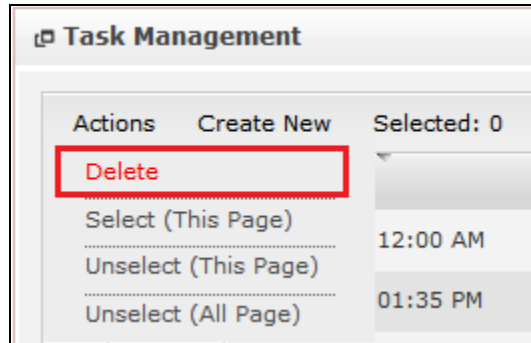


Figure 13.7: Action > Delete Menu

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)**.

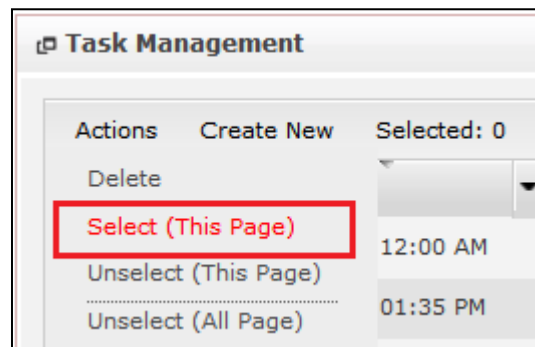


Figure 13.9: Actions > Select (This Page) Menu

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

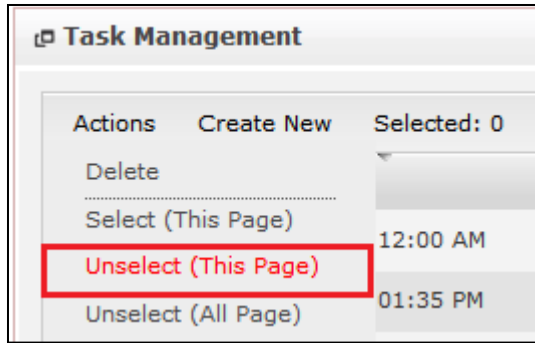


Figure 13.10: Actions > Unselect (This Page) Menu

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

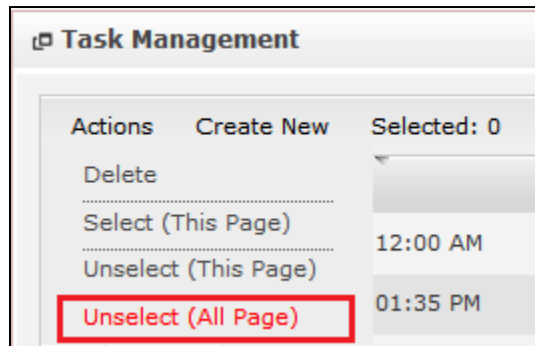






Figure 13.11: Actions > Unselect (All Pages) Menu

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.

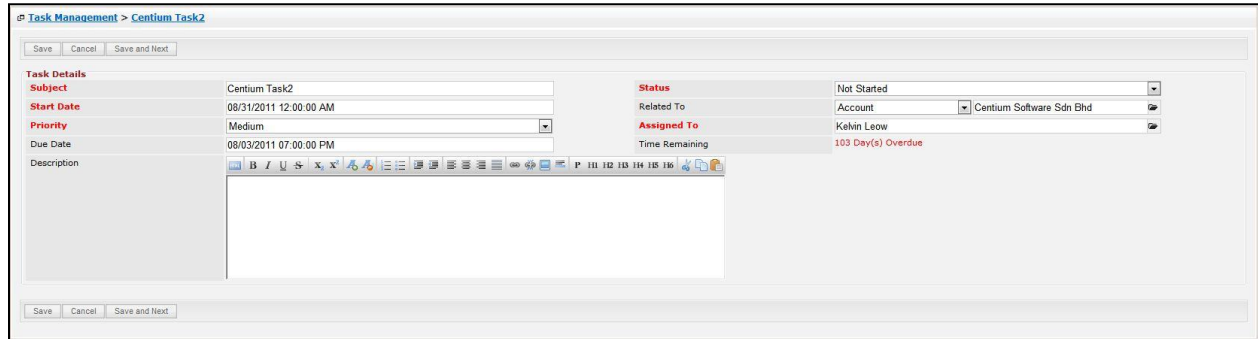


Figure 13.13: Task Management Edit Page

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**.

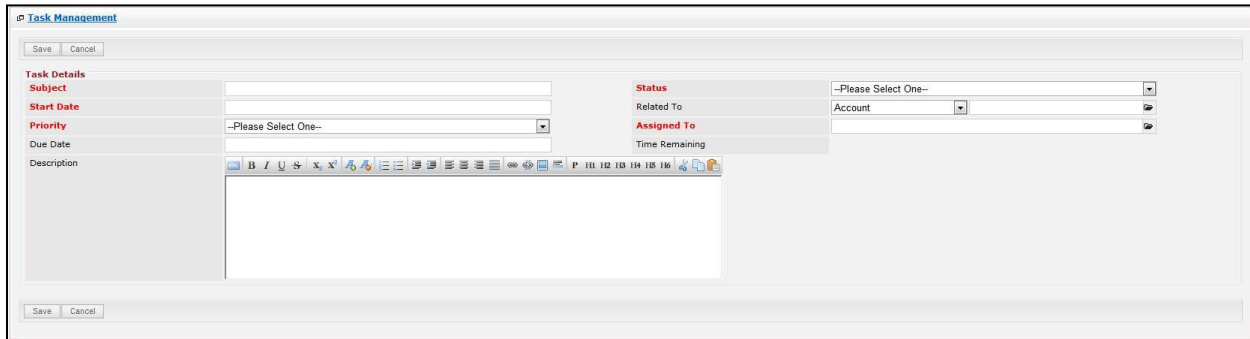


Figure 13.14: Create Task – Task Details

- **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.

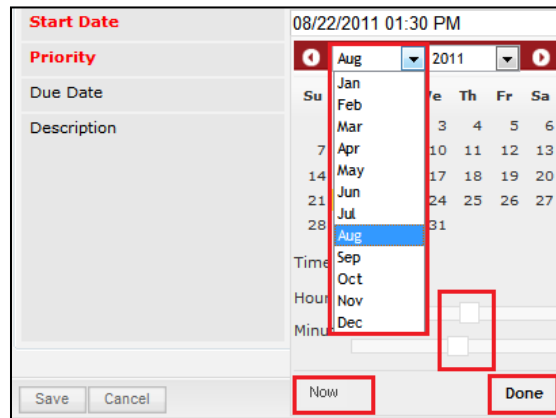


Figure 13.15: Start Date Time

- **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








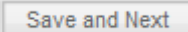
- ii. Click at the  button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



Figure 13.17: Assigned To Popup

To cancel creating New Task, click  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  button in **Task Management Detail** page. After clicking the **Edit**  button or  button, page will navigate to **Task Management** page. Edit the relevant details and click  button to save the changes and navigates back to **Task Management Detail** page or click  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**.

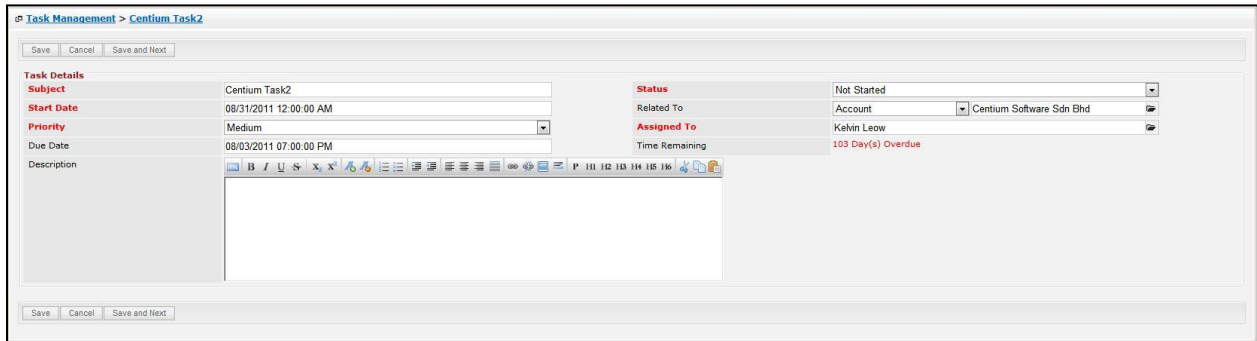


Figure 13.18: Edit Task – Task Details

- **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.

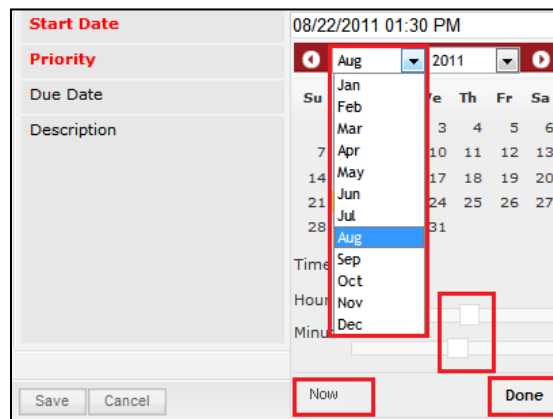



Figure 13.19: Start Date Time

- **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:

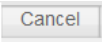
- i. Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)  
**OR**

**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	<a href="#">System</a>	<a href="#">Admin</a>	Administrator	Active	1	admin@netstermsc.com	<a href="#">Blank</a>
farid	<a href="#">Farid</a>	<a href="#">Bin Faisal</a>	Administrator	Active		scyip@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
irwan	<a href="#">Mohd Irwan</a>	<a href="#">Rizal</a>		Active	0122390079	admin@netstermsc.com	<a href="#">System Admin</a>
razlan	<a href="#">Mohd Razlan</a>	<a href="#">Bin Abdul Rahma</a>	Administrator	Active		admin@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
scyip	<a href="#">Blank</a>	<a href="#">kenix</a>	User	Active		scyip@netstermsc.com	<a href="#">Blank</a>

**Figure 13.21: Assigned To Popup**

To **cancel editing New Task**, click  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.

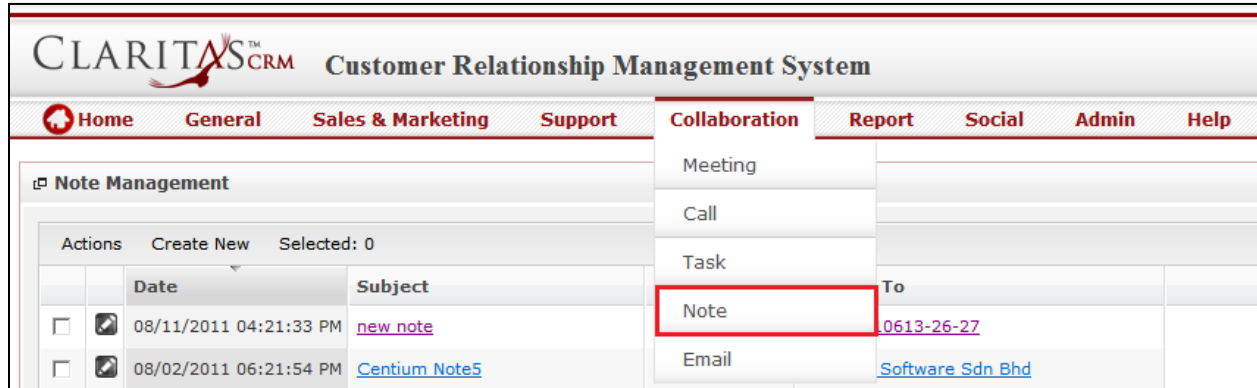


Figure 14.1: Note Menu in Main Menu

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

Actions	Date	Subject	Attachment	Related To
<input type="checkbox"/>	08/11/2011 04:21:33 PM	<a href="#">new note</a>		<a href="#">CRD20110613-26-27</a>
<input type="checkbox"/>	08/02/2011 06:21:54 PM	<a href="#">Centium Note5</a>		<a href="#">Centium Software Sdn Bhd</a>
<input type="checkbox"/>	08/02/2011 06:17:46 PM	<a href="#">Centium Note2</a>		<a href="#">Centium Software Sdn Bhd</a>
<input type="checkbox"/>	08/02/2011 06:16:01 PM	<a href="#">Centium Note3</a>		<a href="#">Centium Software Sdn Bhd</a>
<input type="checkbox"/>	08/02/2011 06:15:19 PM	<a href="#">Centium Note</a>		<a href="#">Centium Software Sdn Bhd</a>
<input type="checkbox"/>	08/02/2011 06:15:09 PM	<a href="#">Centium Note</a>	//	<a href="#">Centium Software Sdn Bhd</a>
<input type="checkbox"/>	08/02/2011 06:14:49 PM	<a href="#">Centium Note</a>	//	<a href="#">Centium Software Sdn Bhd</a>
<input type="checkbox"/>	07/05/2011 06:02:52 PM	<a href="#">some note</a>		<a href="#">CRD20110627-70</a>
<input type="checkbox"/>	07/05/2011 05:11:44 PM	<a href="#">Kenny Note</a>		<a href="#">Kenny Yip</a>
<input type="checkbox"/>	07/04/2011 05:29:24 PM	<a href="#">Account Note</a>	// //	<a href="#">Company Test</a>
<input type="checkbox"/>	06/30/2011 01:30:47 PM	<a href="#">CRD20110630-101 Note</a>		<a href="#">CRD20110630-101</a>
<input type="checkbox"/>	06/26/2011 06:31:00 AM	<a href="#">Carlsberg Account Note</a>		<a href="#">Carlsberg Brewery Malaysia Berhad</a>
<input type="checkbox"/>	06/26/2011 06:30:55 AM	<a href="#">Carlsberg Account Note</a>		<a href="#">Carlsberg Brewery Malaysia Berhad</a>
<input type="checkbox"/>	06/26/2011 06:30:50 AM	<a href="#">Carlsberg Account Note</a>		<a href="#">Carlsberg Brewery Malaysia Berhad</a>
<input type="checkbox"/>	06/26/2011 06:30:45 AM	<a href="#">Carlsberg Account Note</a>	//	<a href="#">Carlsberg Brewery Malaysia Berhad</a>

Figure 14.2: Note Listing

To view the Note Details, click at the Subject hyperlink in Subject column.

Note Management					
Actions		Create New	Selected: 0		
	Date	Subject	Attachment	Related To	
<input type="checkbox"/>	08/02/2011 06:21:54 PM	<a href="#">Centium Note5</a>		<a href="#">Centium Software Sdn Bhd</a>	
<input type="checkbox"/>	08/02/2011 06:17:46 PM	<a href="#">Centium Note2</a>		<a href="#">Centium Software Sdn Bhd</a>	
<input type="checkbox"/>	08/02/2011 06:16:01 PM	<a href="#">Centium Note3</a>		<a href="#">Centium Software Sdn Bhd</a>	
<input type="checkbox"/>	08/02/2011 06:15:19 PM	<a href="#">Centium Note</a>		<a href="#">Centium Software Sdn Bhd</a>	
<input type="checkbox"/>	08/02/2011 06:15:09 PM	<a href="#">Centium Note</a>	//	<a href="#">Centium Software Sdn Bhd</a>	
<input type="checkbox"/>	08/02/2011 06:14:49 PM	<a href="#">Centium Note</a>	//	<a href="#">Centium Software Sdn Bhd</a>	

Page 1 of 1 | Displaying 1 to 6 of 6 items

Figure 14.3: Subject Hyperlink

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

Note Management > Centium Note

Edit | Cancel | Copy New

**Note Details**

Subject: Centium Note

Related To: [Centium Software Sdn Bhd](#)

Attachment:

Description:

**System Information**

Created Date: 08/02/2011 06:15:19 PM | Created By: FTSB/kleow

Last Updated Date: 08/02/2011 06:15:19 PM | Last Updated By: FTSB/kleow

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.

Note Management

Actions | **Create New** | Selected: 0

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 [“Create New Note”](#)

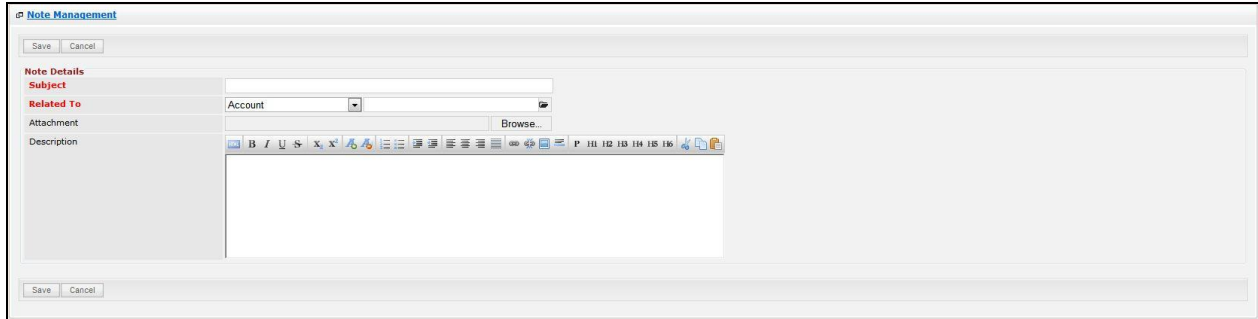


Figure 14.6: Note Management Create New Page

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

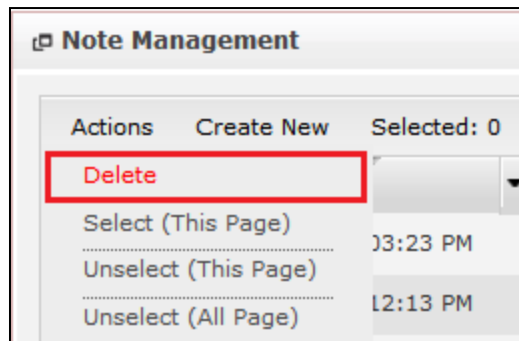


Figure 14.7: Action > Delete Menu

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)**.

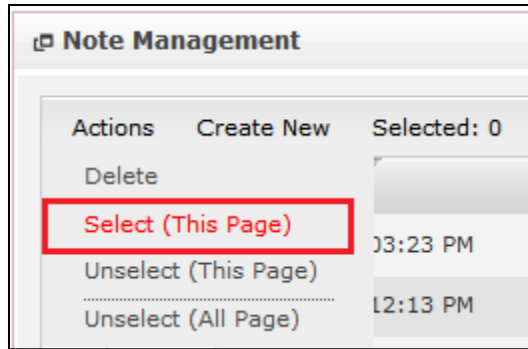


Figure 14.9: Actions > Select (This Page) Menu

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

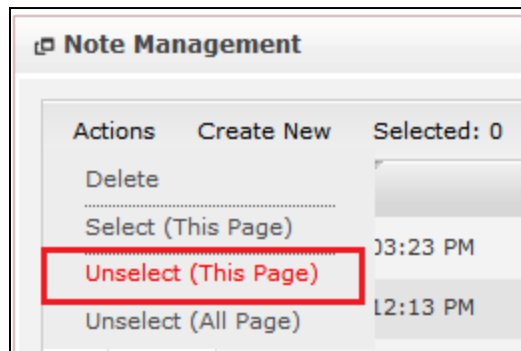


Figure 14.10: Actions > Unselect (This Page) Menu

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

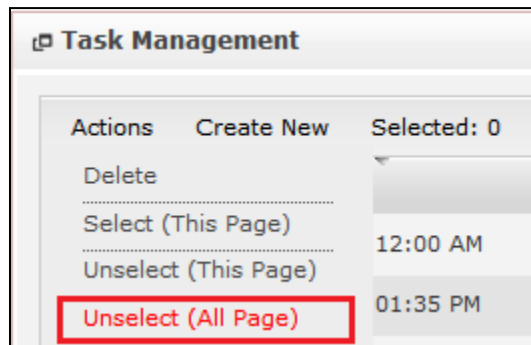






Figure 14.11: Actions > Unselect (All Pages) Menu

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.

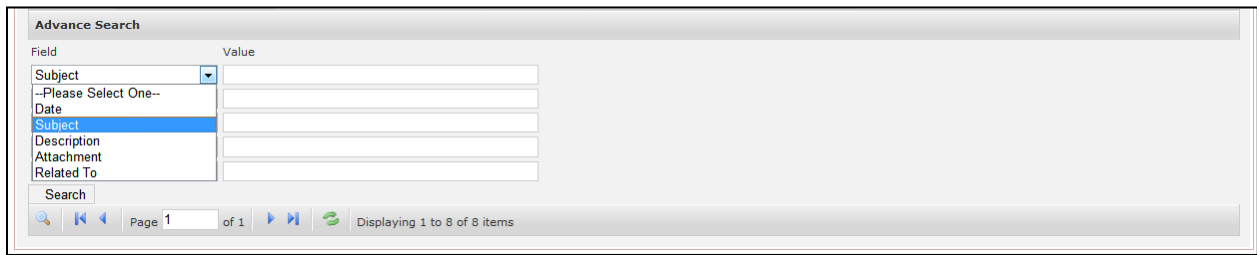




Figure 14.12: Note Advance Search

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.

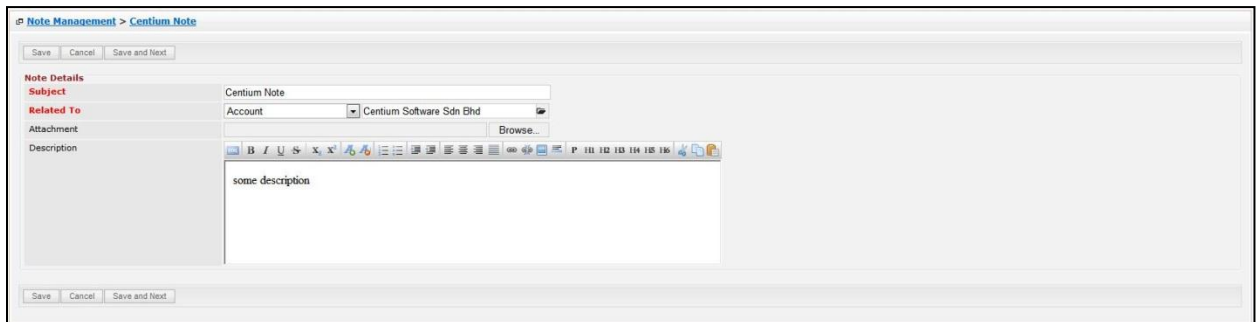


Figure 14.13: Note Management Edit Page

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**.

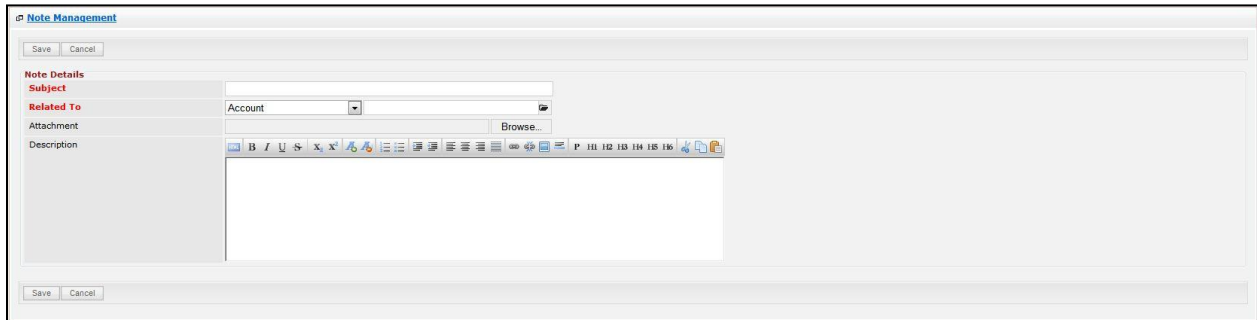





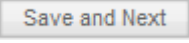


Figure 14.14: Create Note – Note Details

- **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, .gif
  - **Audio:** .mp3, .wma
  - **Video:** .3gp, .mp4, .rmvb, .avi, .flv
  - **Archive:** .zip, .rar

To cancel creating New Note, click  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  button in **Note Management Detail** page. After clicking the **Edit**  button or  button, page will navigate to **Note Management** page. Edit the relevant details and click  button to save the changes and navigates back to **Note Management Detail** page or click  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**.

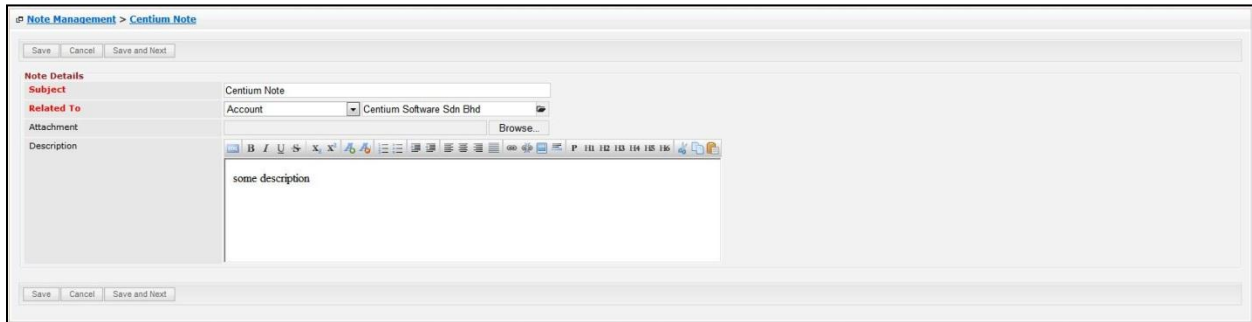


Figure 14.15: Edit Note – Note Details

- **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, .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.

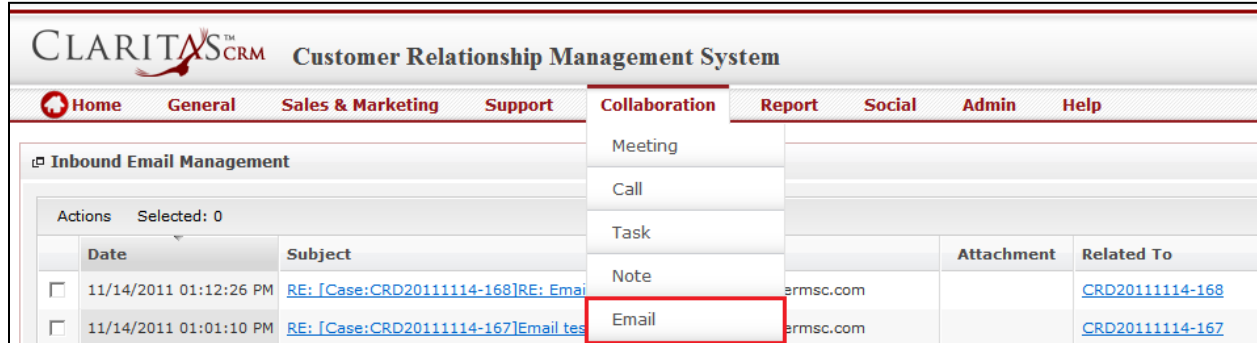


Figure 15.1: Email Menu in Main Menu

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.

Date	Subject	Email From	Attachment	Related To
11/14/2011 01:12:26 PM	RE: [Case:CRD20111114-168]RE: Email testing with re	kcfong@netstermsc.com		<a href="#">CRD20111114-168</a>
11/14/2011 01:01:10 PM	RE: [Case:CRD20111114-167]Email testing with re	kcfong@netstermsc.com		<a href="#">CRD20111114-167</a>
10/06/2011 07:56:05 PM	RE:[Case:CRD20111006-04]Enquiry on FengShui 3	notification@claritascrm.com		<a href="#">CRD20111006-139</a>
10/06/2011 07:50:22 PM	RE:[Case:CRD20111006-04]Enquiry on FengShui 3	notification@claritascrm.com		<a href="#">CRD20111006-138</a>
10/03/2011 04:29:18 PM	RE:[Case:CRD20111003-130]Enquiry on ABC Prodi	notification@claritascrm.com		<a href="#">CRD20111003-130</a>
09/21/2011 03:15:07 PM	new case on complaint	kcfong@netstermsc.com		<a href="#">CRD20110921-127</a>
09/08/2011 07:19:38 PM	RE: [Case:CRD20110908-125]Need Help with This P	kleow@netstermsc.com		<a href="#">CRD20110908-125</a>
09/08/2011 07:15:03 PM	RE:[Case:CRD20110908-125]Need Help with This P	notification@claritascrm.com		<a href="#">CRD20110908-125</a>
09/02/2011 04:35:36 PM	RE:[Case:CRD20110728-116]Enquiry on Your CRM	notification@claritascrm.com		<a href="#">CRD20110728-116</a>
09/02/2011 04:34:33 PM	RE:RE:[Case:CRD20110728-116]Enquiry on Your C	notification@claritascrm.com		<a href="#">CRD20110728-116</a>
07/28/2011 11:47:44 AM	RE:[Case:CRD20110728-116]Enquiry on Your CRM	notification@claritascrm.com		<a href="#">CRD20110728-116</a>
07/27/2011 12:08:28 PM	RE: [Case:CRD20110727-115]Test support@clarita	kleow@netstermsc.com		<a href="#">CRD20110727-115</a>
07/27/2011 12:07:13 PM	RE:[Case:CRD20110727-115]Test support@clarita	notification@claritascrm.com		<a href="#">CRD20110727-115</a>
07/27/2011 11:50:04 AM	mail log case test	kcfong@netstermsc.com		<a href="#">CRD20110727-114</a>

Figure 15.2: Email Listing

To view the Email Details, click at the Subject hyperlink in Subject column.

Inbound Email Management					
Actions Selected: 0					
	Date	Subject	Email From	Attachment	Related To
<input type="checkbox"/>	10/06/2011 07:56:05 PM	<a href="#">RE:[Case:CRD20111006-04]Enquiry on FengShui 3</a>	notification@claritascrm.com		<a href="#">CRD20111006-139</a>
<input type="checkbox"/>	10/06/2011 07:50:22 PM	<a href="#">RE:[Case:CRD20111006-04]Enquiry on FengShui 3</a>	notification@claritascrm.com		<a href="#">CRD20111006-138</a>
<input type="checkbox"/>	10/03/2011 04:29:18 PM	<a href="#">RE:[Case:CRD20111003-130]Enquiry on ABC Prod</a>	notification@claritascrm.com		<a href="#">CRD20111003-130</a>
<input type="checkbox"/>	09/08/2011 07:15:03 PM	<a href="#">RE:[Case:CRD20110908-125]Need Help with This F</a>	notification@claritascrm.com		<a href="#">CRD20110908-125</a>
<input type="checkbox"/>	09/02/2011 04:35:36 PM	<a href="#">RE:[Case:CRD20110728-116]Enquiry on Your CRM</a>	notification@claritascrm.com		<a href="#">CRD20110728-116</a>
<input type="checkbox"/>	09/02/2011 04:34:33 PM	<a href="#">RE:RE:[Case:CRD20110728-116]Enquiry on Your C</a>	notification@claritascrm.com		<a href="#">CRD20110728-116</a>
<input type="checkbox"/>	07/28/2011 11:47:44 AM	<a href="#">RE:[Case:CRD20110728-116]Enquiry on Your CRM</a>	notification@claritascrm.com		<a href="#">CRD20110728-116</a>
<input type="checkbox"/>	07/27/2011 12:07:13 PM	<a href="#">RE:[Case:CRD20110727-115]Test support@claritas</a>	notification@claritascrm.com		<a href="#">CRD20110727-115</a>

Page 1 of 1 | Displaying 1 to 8 of 8 items

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.

Inbound Email Management > RE:[Case:CRD20110728-116]Enquiry on Your CRM Product

Reply Reply All Cancel


**Inbound Email Details**

Related To	<a href="#">CRD20110728-116</a>	Date Sent	09/02/2011 08:32:43 AM
Email From	notification@claritascrm.com		
Email To	support@claritascrm.com		
Email CC	support@claritascrm.com		
Email BCC			
Subject	RE:[Case:CRD20110728-116]Enquiry on Your CRM Product		
Description	<a href="http://www.claritascrm.com/InboundEmail/7a527a2f-6794-4f50-85a3-a679910f9d0e/7a527a2f-6794-4f50-85a3-a679910f9d0e.html">http://www.claritascrm.com/InboundEmail/7a527a2f-6794-4f50-85a3-a679910f9d0e/7a527a2f-6794-4f50-85a3-a679910f9d0e.html</a>		
Attachment			

**System Information**

Created Date	09/02/2011 04:35:36 PM	Created By	MailReader
Last Updated Date	09/29/2011 03:19:02 PM	Last Updated By	MailReader

Figure 15.4: Email Management Detail Page

To **reply** the email to the **email sender**, click at the  button. A Compose Message window will pop up for user to enter the content and reply to that email.

CLARITAS CRM Customer Relationship Management System

Welcome FTSB/scryp Logout

**Compose Message**

Send Cancel

TO: notification@claritascrm.com

CC:

BCC:

Subject: RE:RE [Case:CRD20110728-116]Enquiry on Your CRM Product

Attachment: Browse

**Email Editing Toolbar**

Rich text editor toolbar with icons for Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Print, and other editing functions.

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.

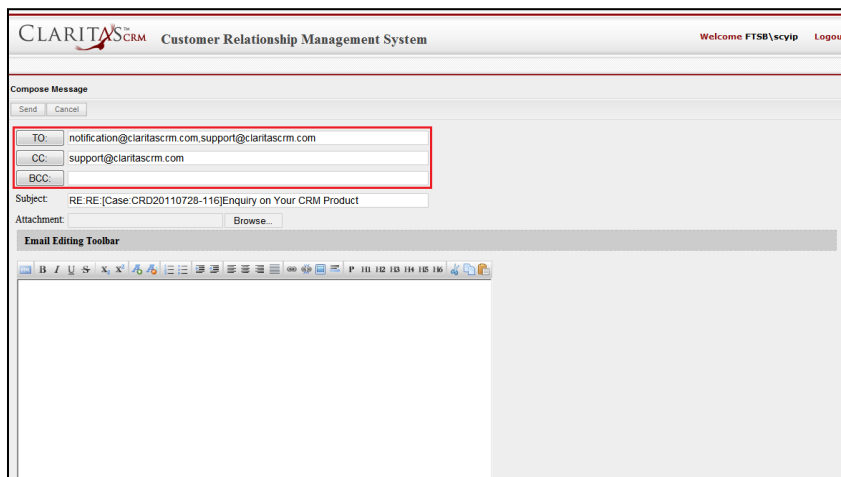


Figure 15.6: Reply All – Compose Message Popup

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

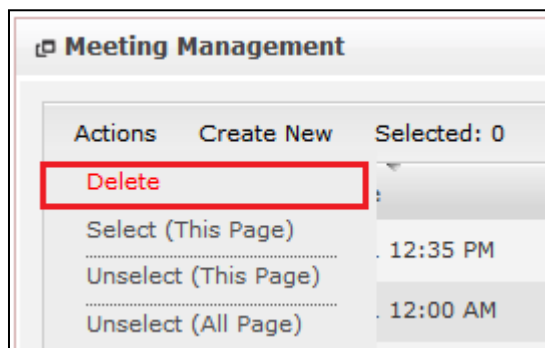


Figure 15.7: Action > Delete Menu

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)**.

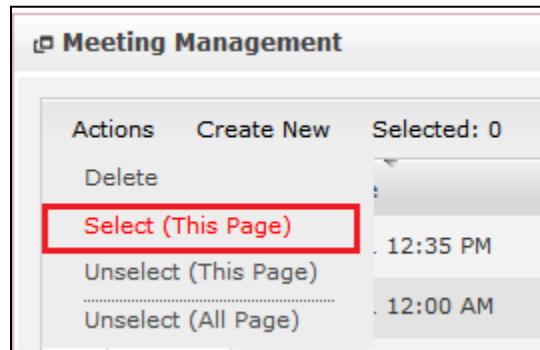


Figure 15.9: Actions > Select (This Page) Menu

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

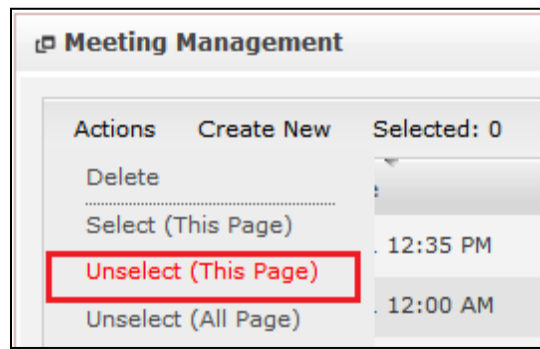


Figure 15.10: Actions > Unselect (This Page) Menu

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

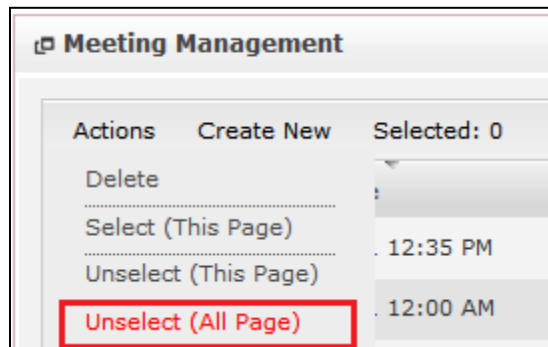






Figure 15.11: Actions > Unselect (All Pages) Menu

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.



Field	Value
Subject	
--Please Select One--	
Start Date	
Subject	
Description	
Duration	
Status	
Assigned To	
Related To	

Page 1 of 1    Displaying 1 to 5 of 5 items

**Figure 15.12: Email Advance Search**



## 16 Report

This module stores all relevant reports of the system.

### Case Reports

#### Case Summary Report

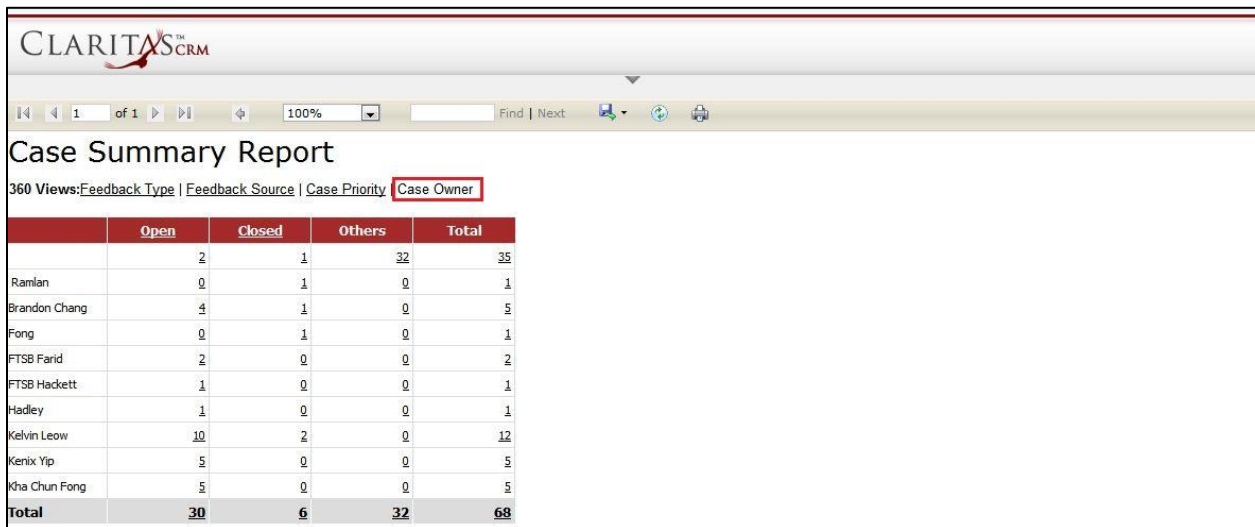
Click at **Report** menu at the Main Menu bar.



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).



The screenshot displays the 'Case Summary Report' interface. At the top, it says '360 Views: Feedback Type | Feedback Source | Case Priority | Case Owner'. Below this is a table with columns for 'Open', 'Closed', 'Others', and 'Total'. The table lists various case owners and their corresponding counts.

	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
<b>Total</b>	<b>30</b>	<b>6</b>	<b>32</b>	<b>68</b>

Figure 16.2: Case Summary Report (Case Owner)

To view Case Summary Report based on Feedback Type, click at the [Feedback Type](#) hyperlink.

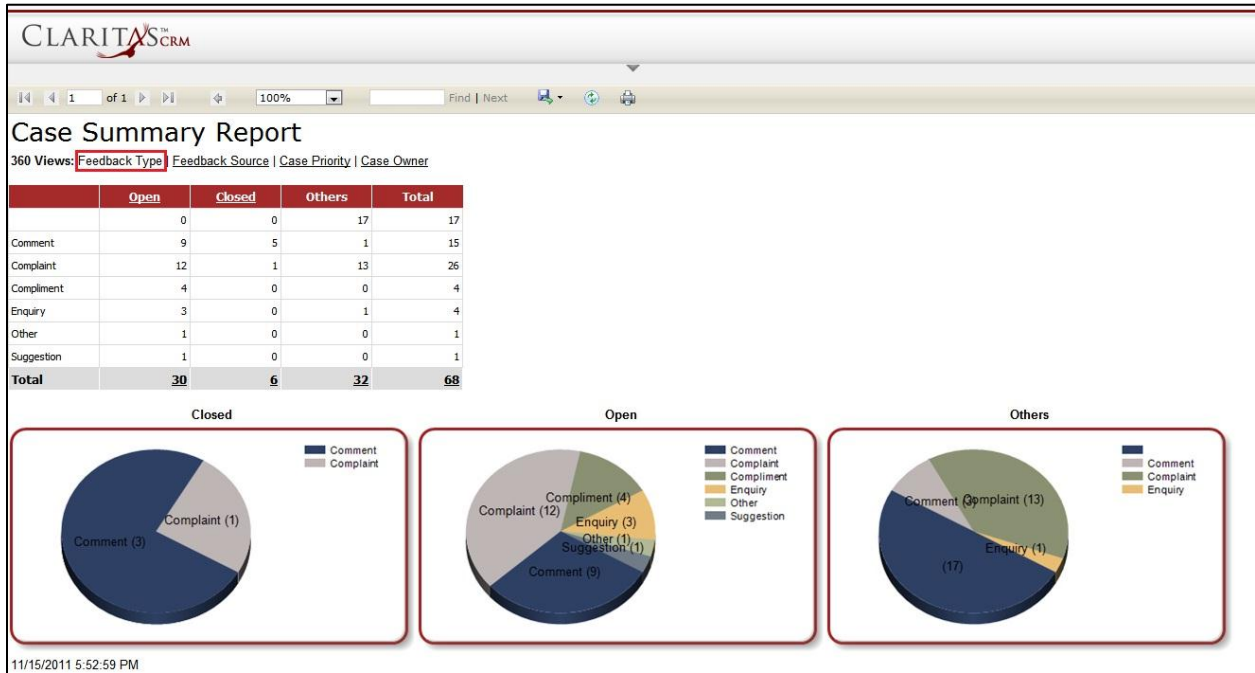


Figure 16.3: Case Summary Report (Feedback Type)

To view Case Summary Report based on Feedback Source, click at the [Feedback Source](#) hyperlink.

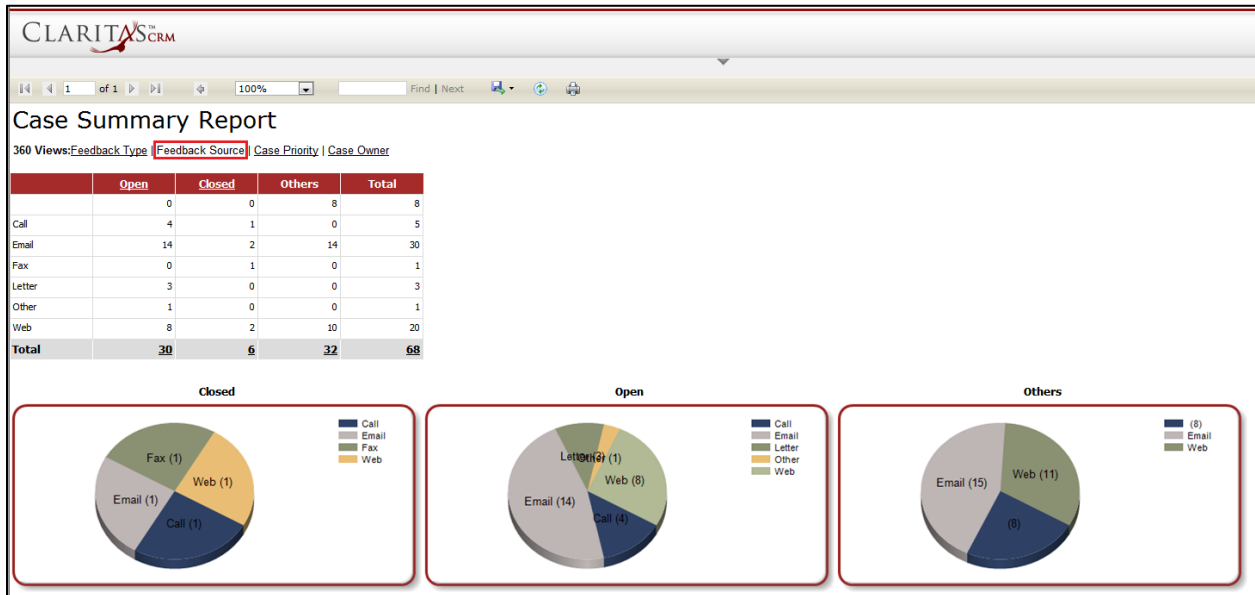


Figure 16.4: Case Summary Report (Feedback Source)

To view Case Summary Report based on Case Priority, click at the [Case Priority](#) hyperlink.

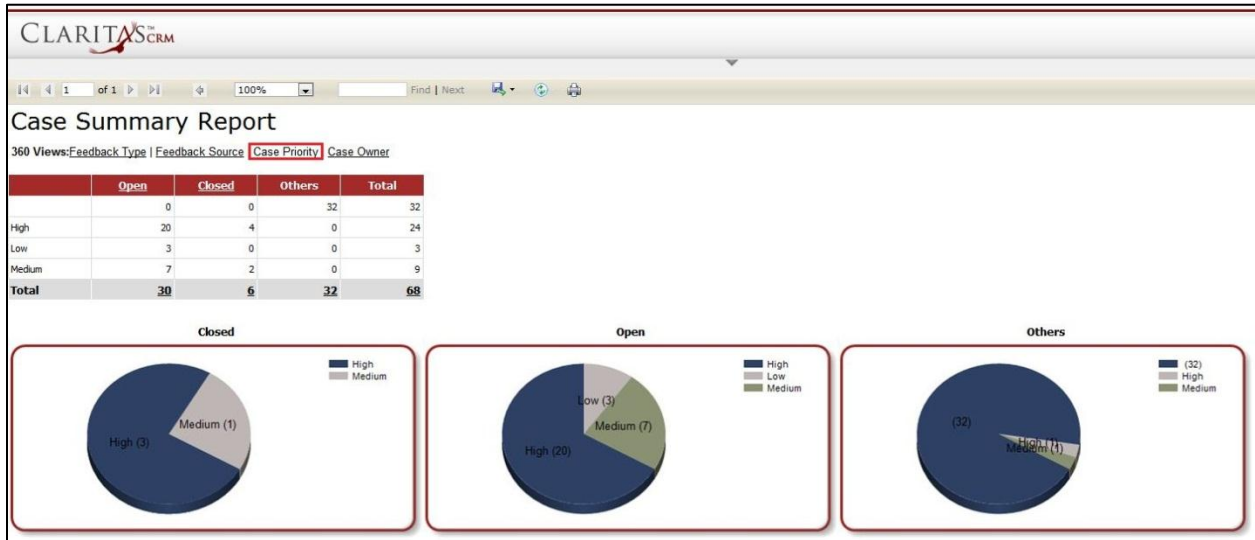




Figure 16.5: Case Summary Report (Case Priority)

User can also filter the record display by selecting the filters. Click at  and select the Field, Filter and Value. Then, click at the  button. Page will refresh and display result based on the filter entered.

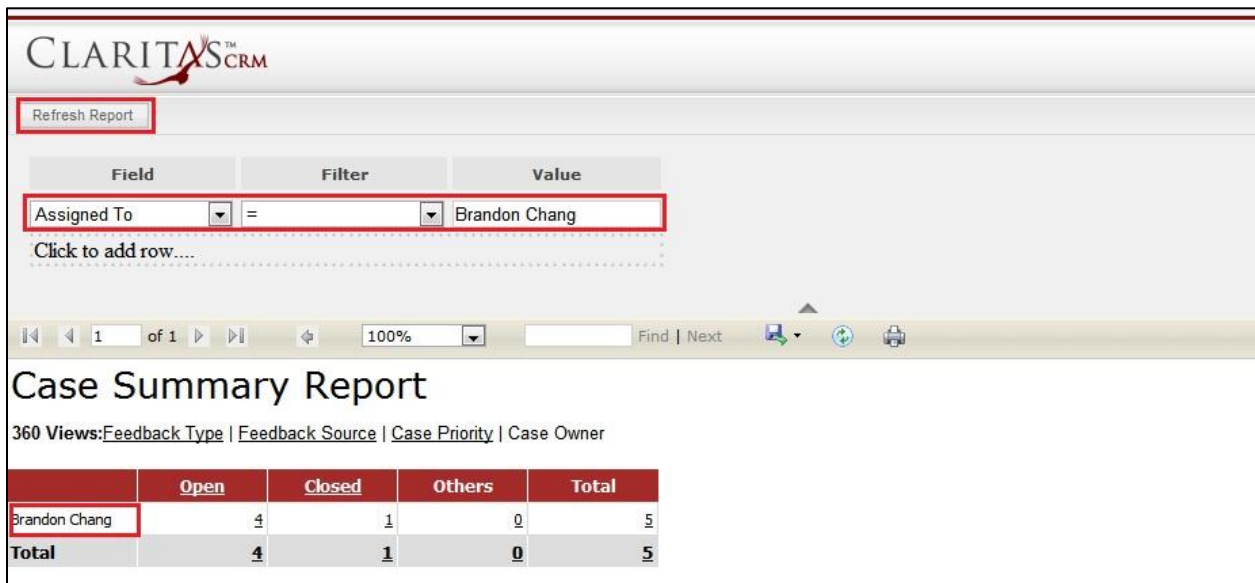






Figure 16.6: Filtered Case Summary Report

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**.

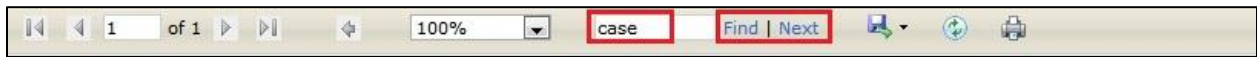


Figure 16.7: Find Textbox in Case Summary Report

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.

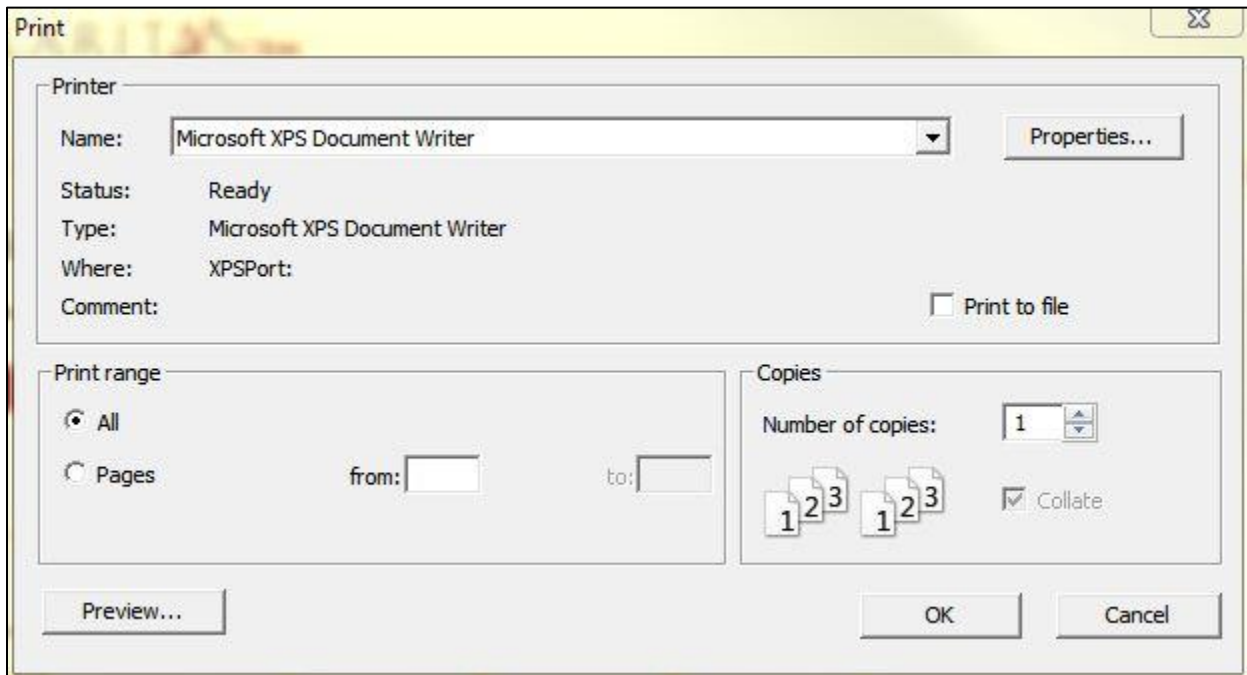


Figure 16.9: Print Popup

## Case Trend

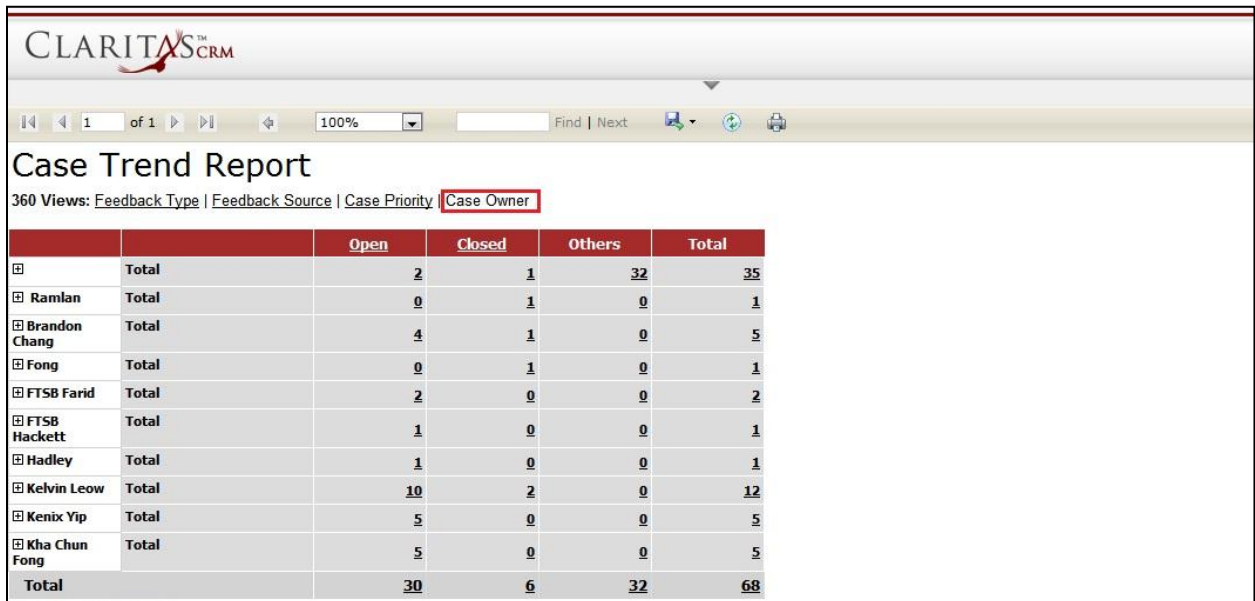
Click at **Report** menu at the Main Menu bar.



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).

The image shows a screenshot of the 'Case Trend Report' window. The title is 'Case Trend Report' and it shows '360 Views' with filters for 'Feedback Type', 'Feedback Source', 'Case Priority', and 'Case Owner'. The 'Case Owner' filter is selected. Below the filters is a table with columns for 'Open', 'Closed', 'Others', and 'Total'. The table lists case owners and their respective counts for each category and a grand total.

		Open	Closed	Others	Total
<input type="checkbox"/>	Total	2	1	32	35
<input type="checkbox"/>	Ramlan	0	1	0	1
<input type="checkbox"/>	Brandon Chang	4	1	0	5
<input type="checkbox"/>	Fong	0	1	0	1
<input type="checkbox"/>	FTSB Farid	2	0	0	2
<input type="checkbox"/>	FTSB Hackett	1	0	0	1
<input type="checkbox"/>	Hadley	1	0	0	1
<input type="checkbox"/>	Kelvin Leow	10	2	0	12
<input type="checkbox"/>	Kenix Yip	5	0	0	5
<input type="checkbox"/>	Kha Chun Fong	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.

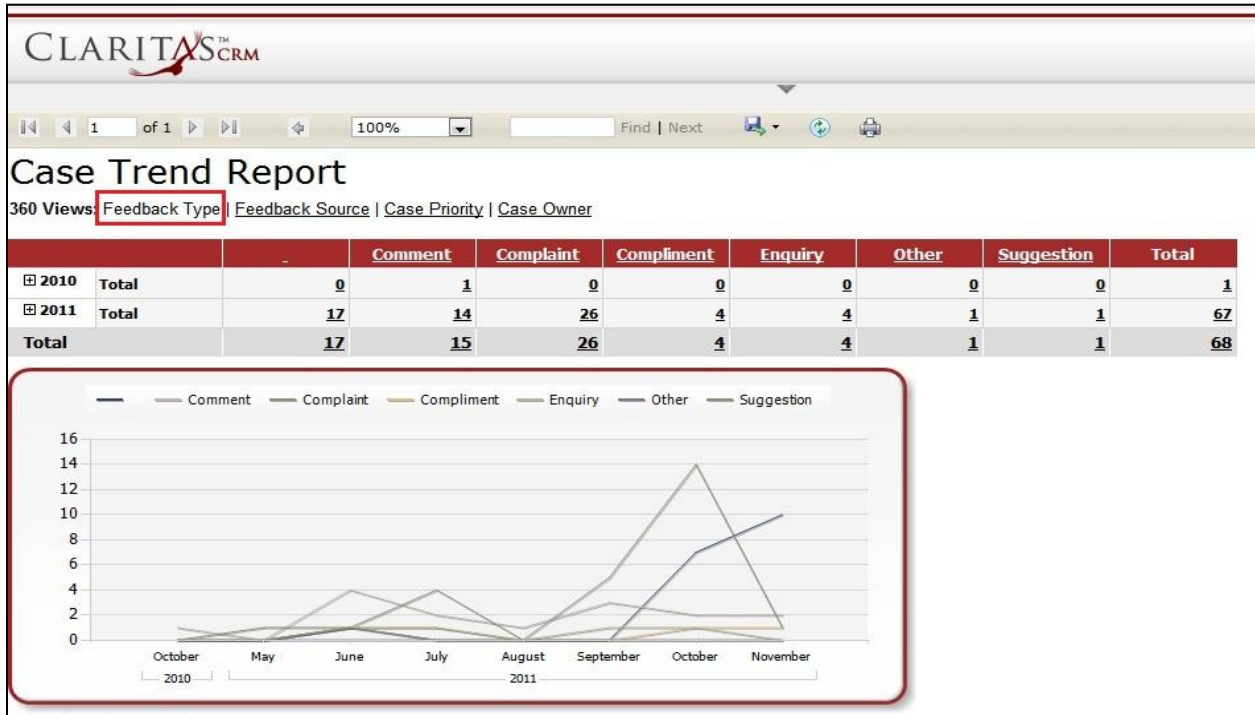


Figure 16.12: Case Trend Report (Feedback Type)

To view Case Trend Report based on Feedback Source, click at the [Feedback Source](#) hyperlink.

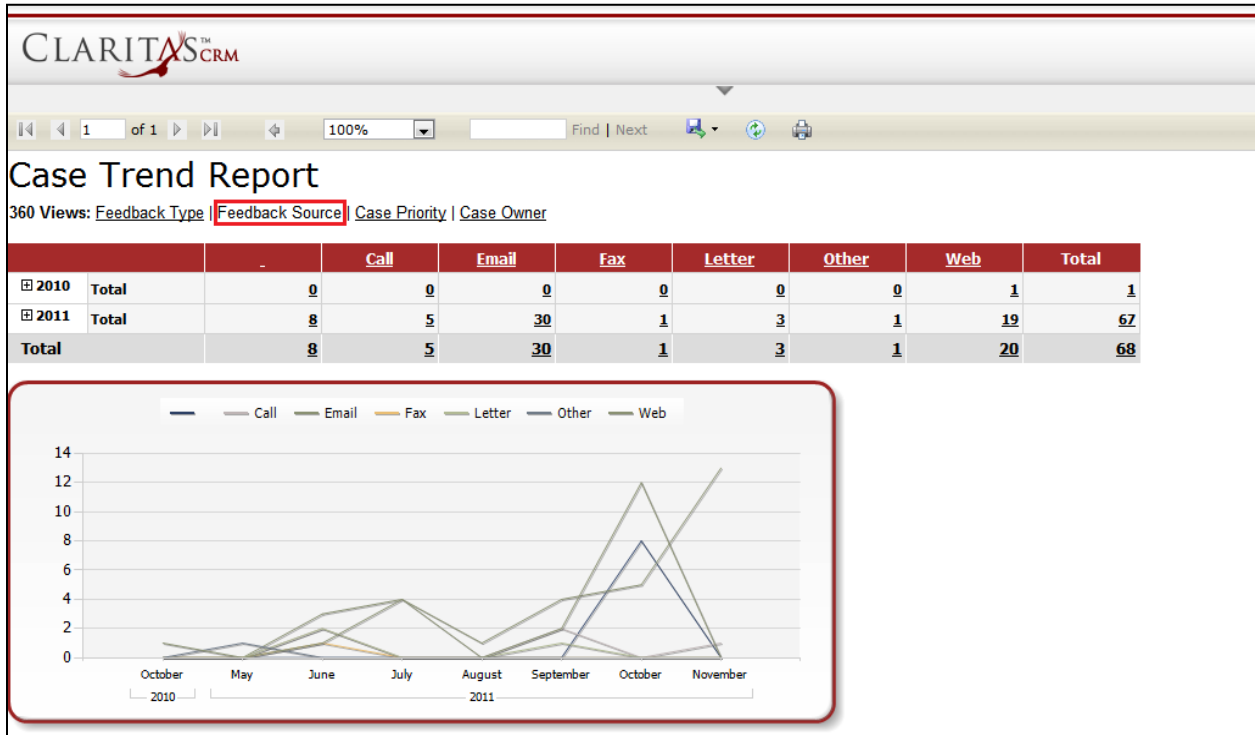


Figure 16.13: Case Trend Report (Feedback Source)

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 and select the Field, Filter and Value. Then, click at the button. Page will refresh and display result based on the filter entered.

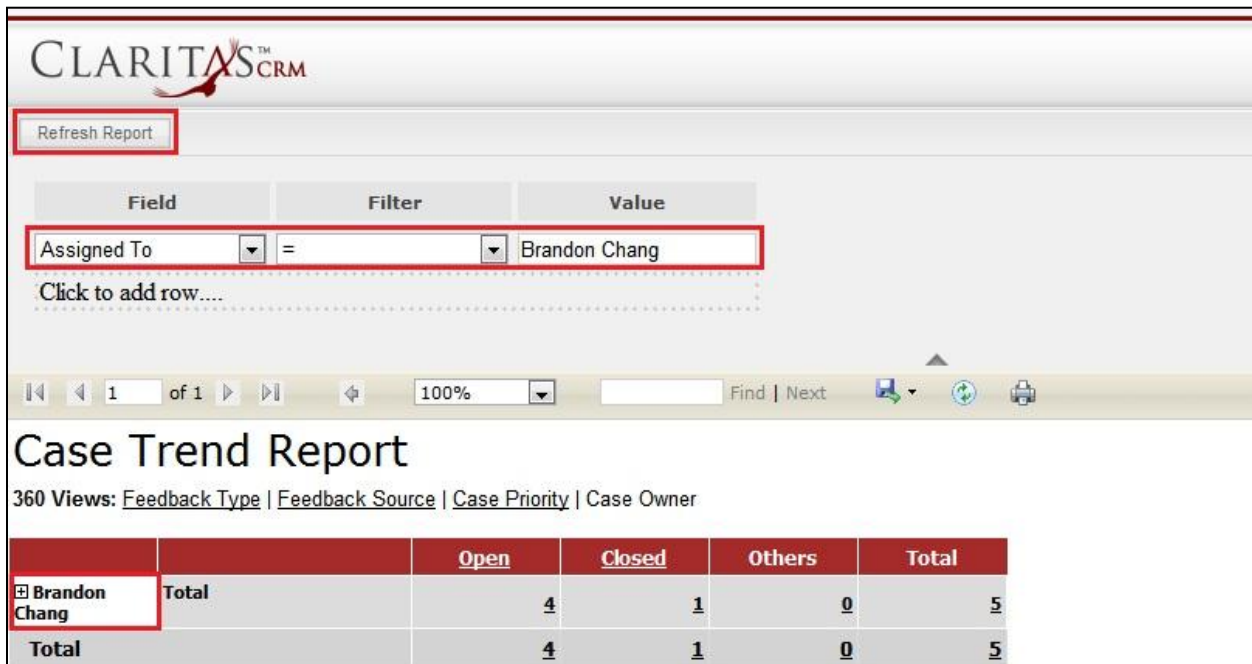






Figure 16.15: Filtered Case Trend Report

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**.

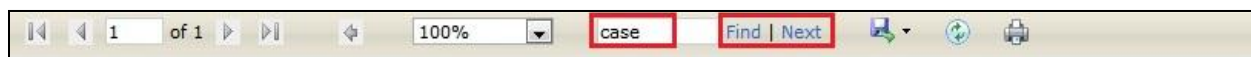


Figure 16.16: Find Textbox in Case Trend Report

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.

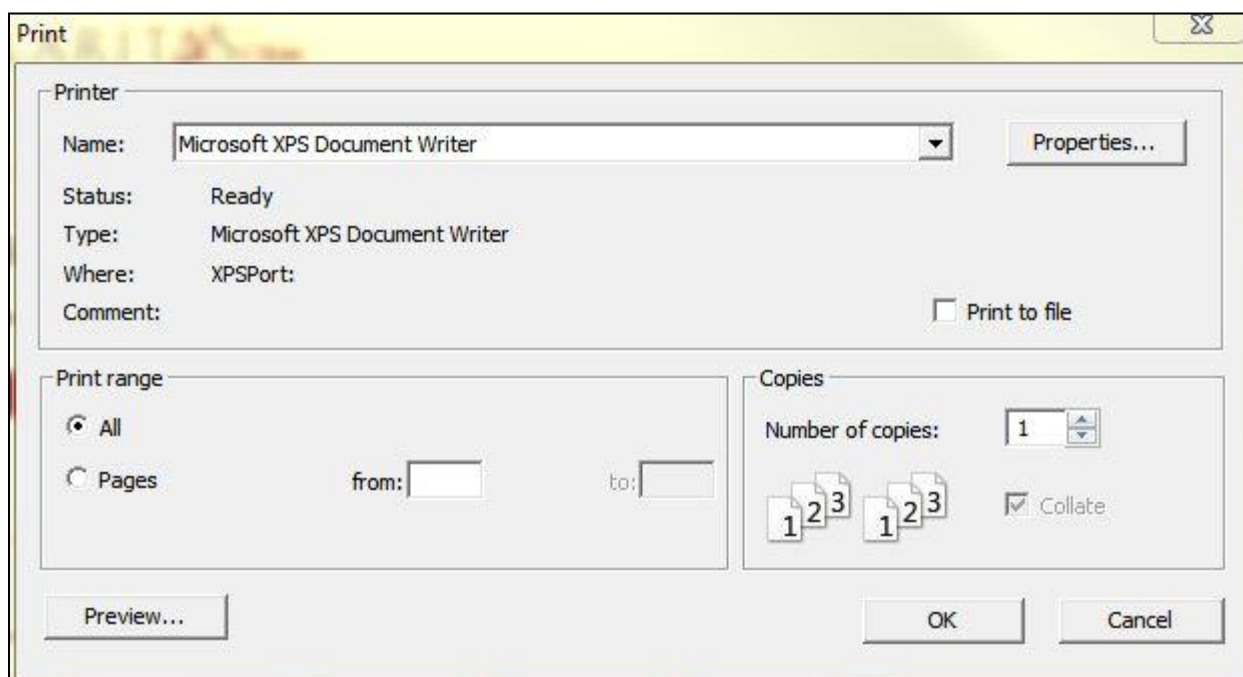


Figure 16.18: Print Popup



## 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).

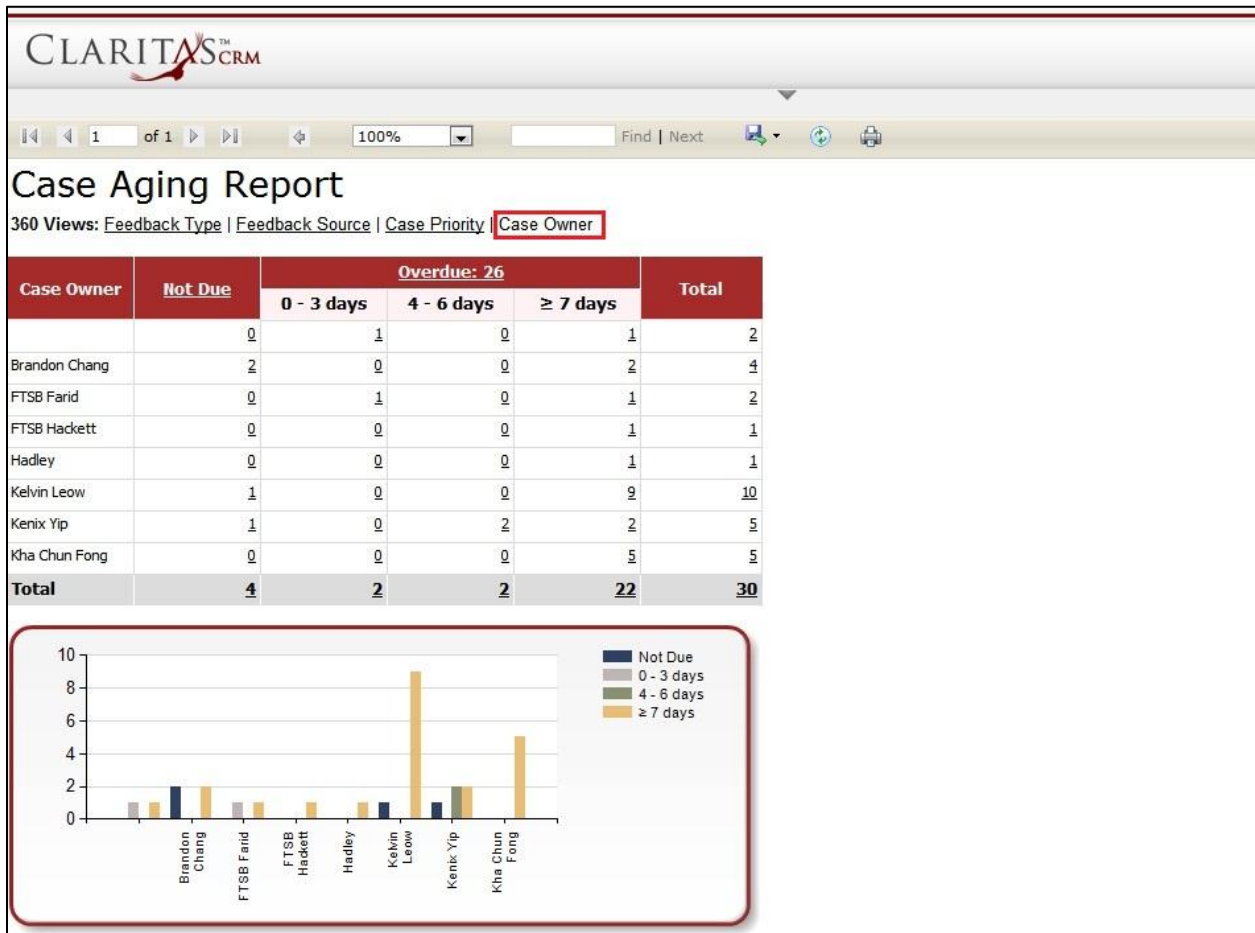


Figure 16.20: Case Aging Report (Case Owner)

To view Case Aging Report based on Feedback Type, click at the [Feedback Type](#) hyperlink.

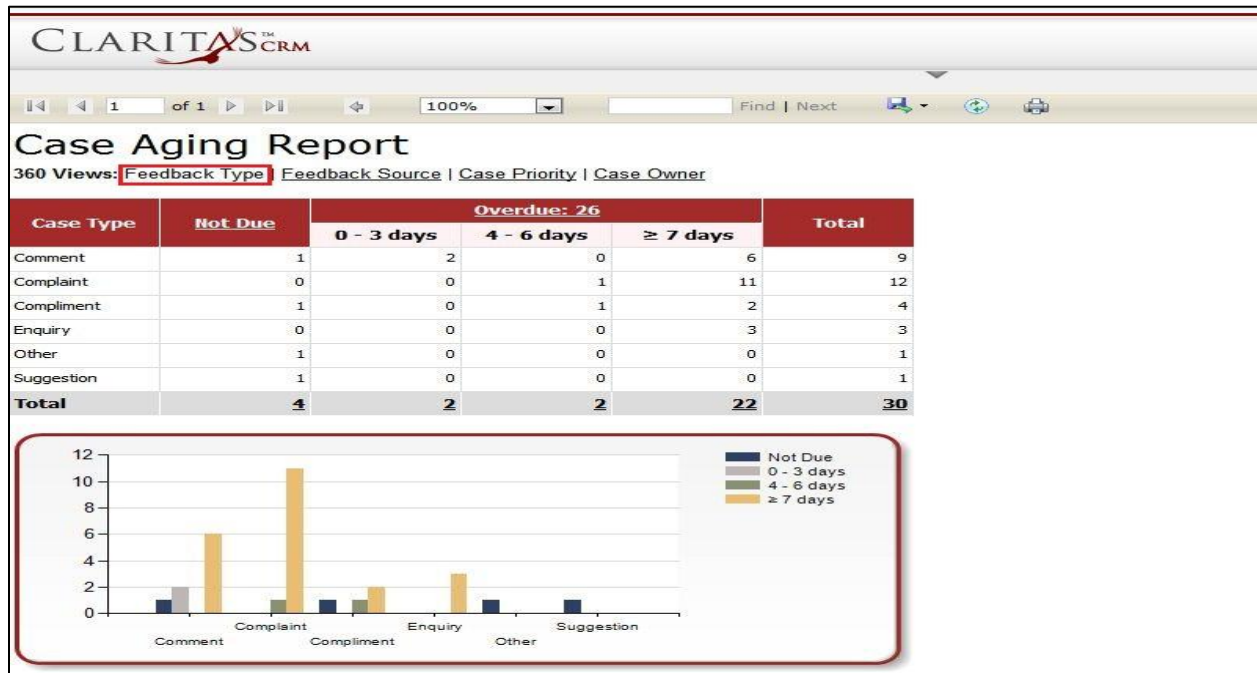


Figure 16.21: Case Aging Report (Feedback Type)

To view Case Aging Report based on Feedback Source, click at the [Feedback Type](#) hyperlink.

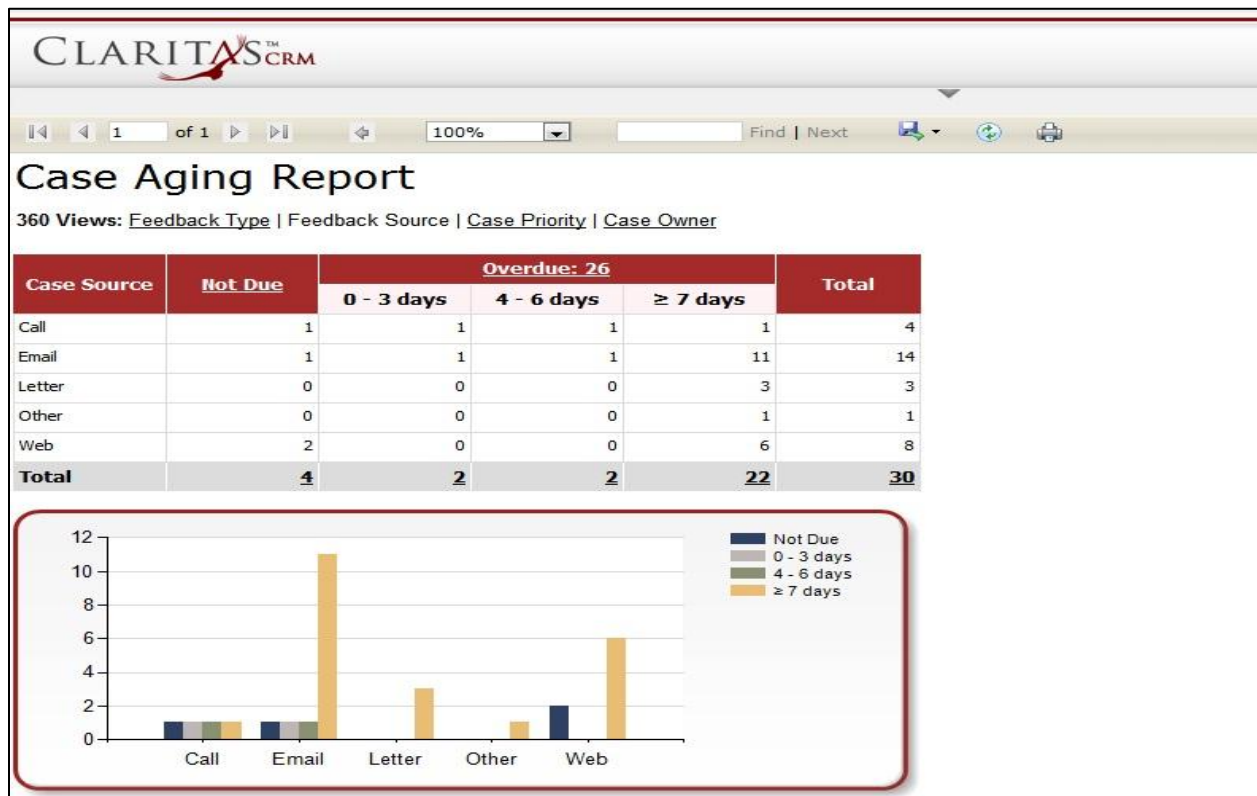


Figure 16.22: Case Aging Report (Feedback Source)

To view Case Aging Report based on Case Priority, click at the [Feedback Type](#) hyperlink.

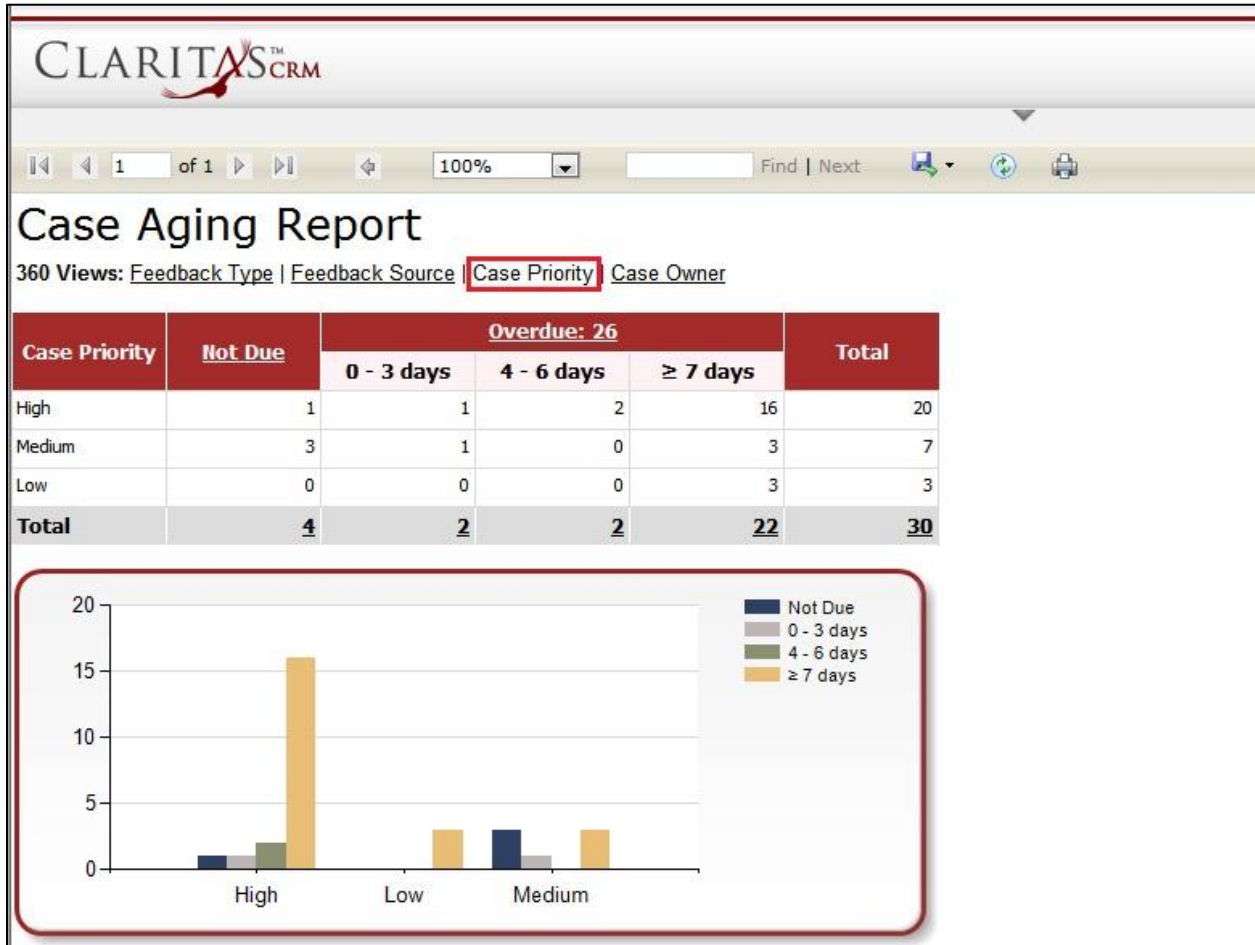




Figure 16.23: Case Aging Report (Case Priority)

User can also filter the record display by selecting the filters. Click at  and select the Field, Filter and Value. Then, click at the  button. Page will refresh and display result based on the filter entered.

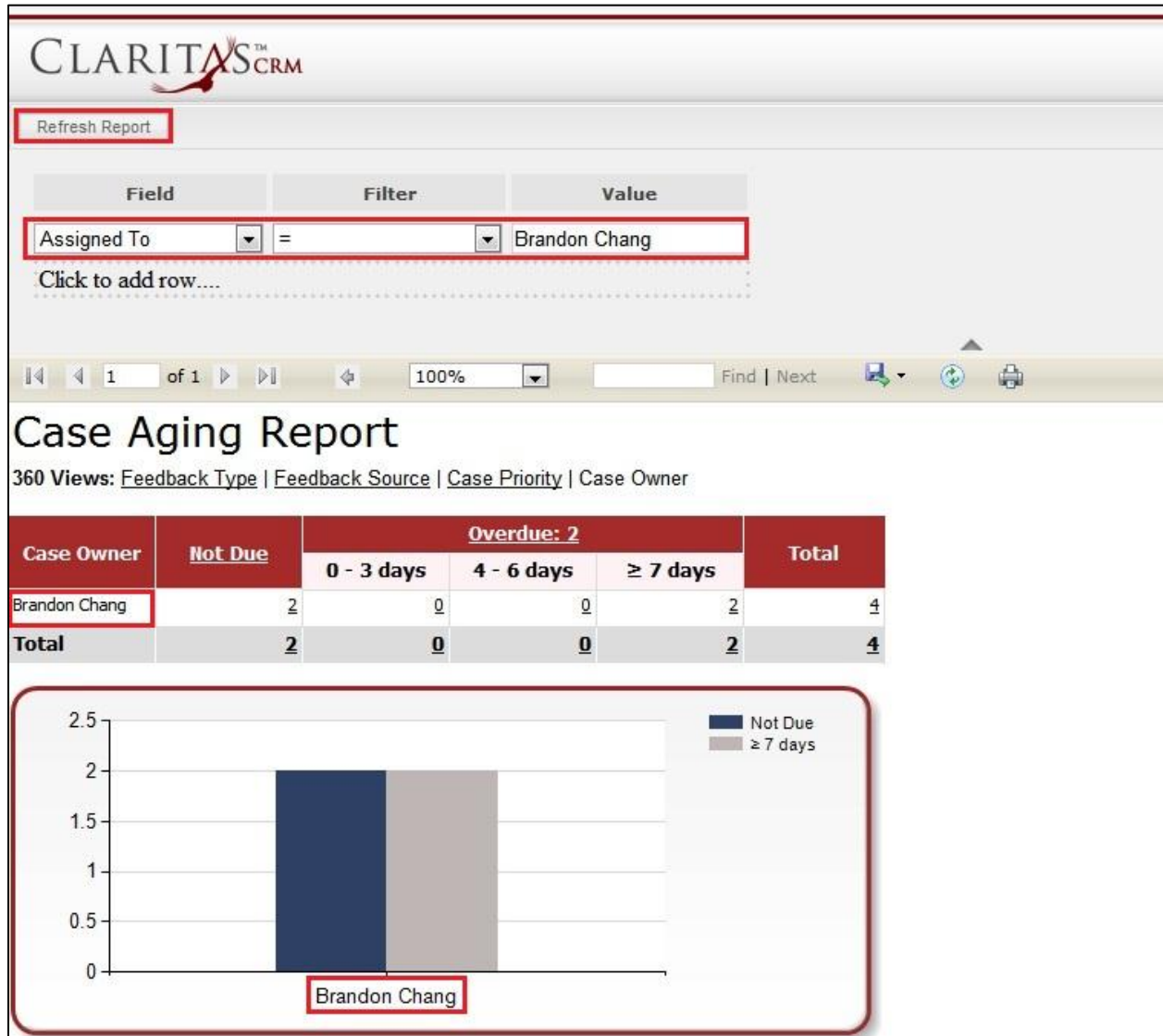






Figure 16.24: Filtered Case Aging Report

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**.

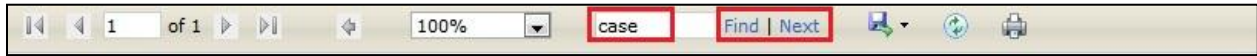


Figure 16.25: Find Textbox in Case Aging

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.

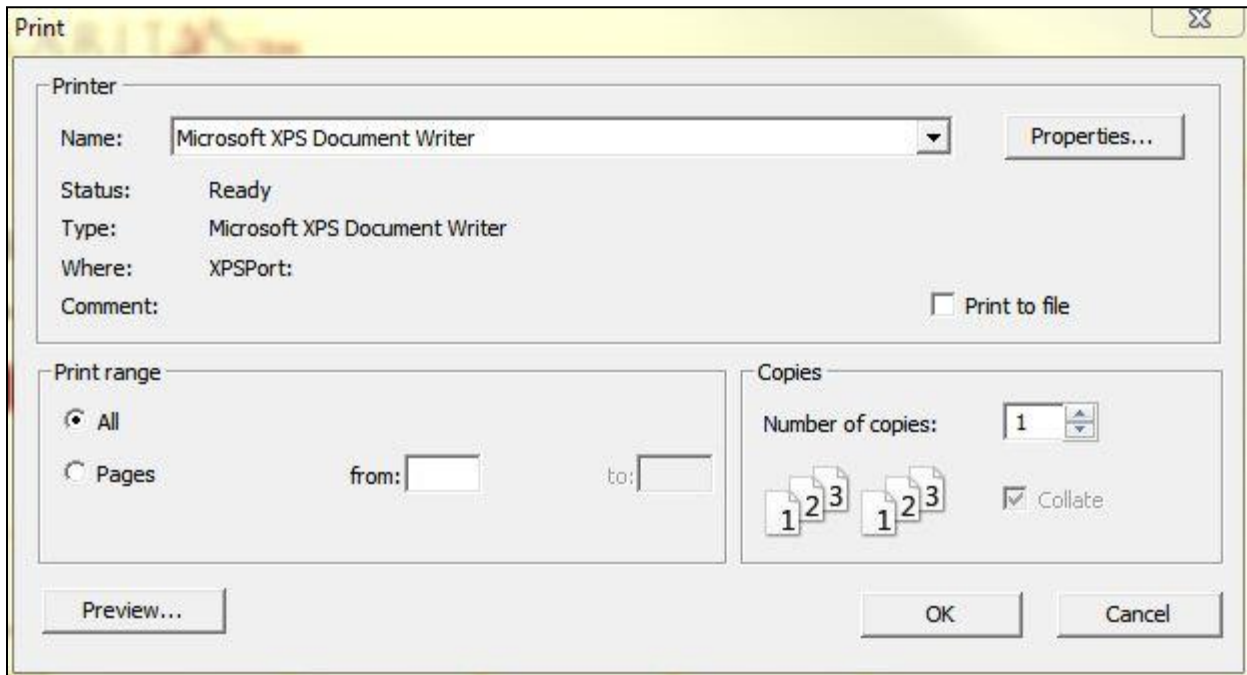


Figure 16.27: Print Popup

## 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).

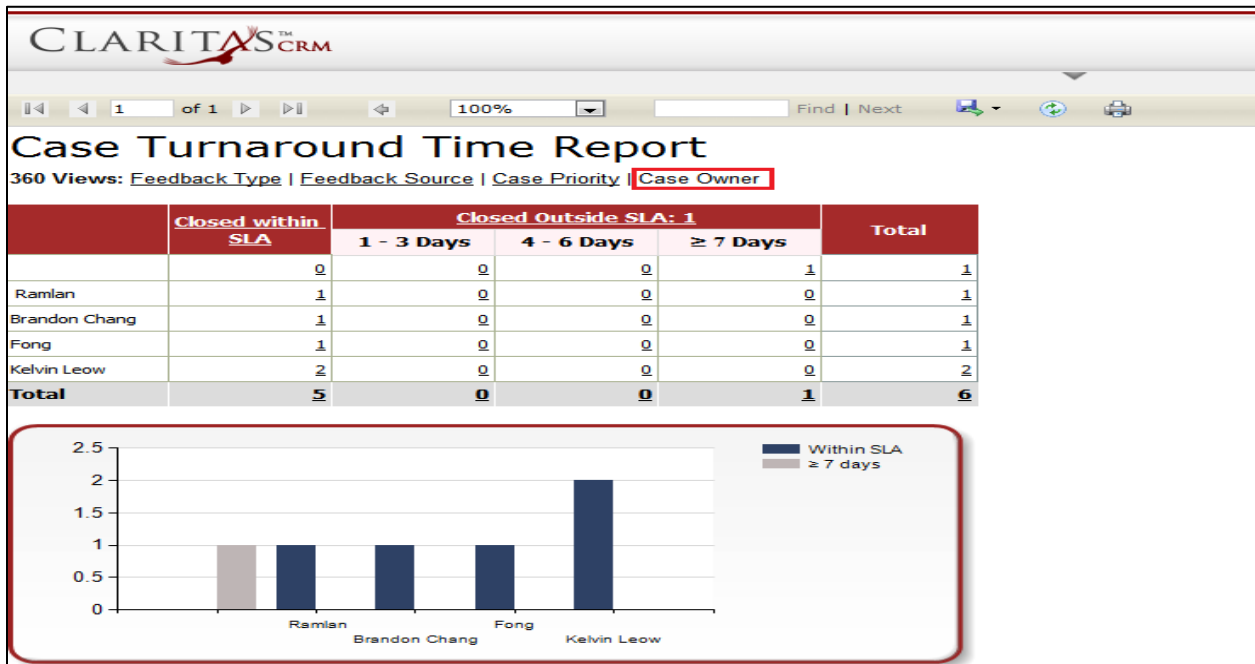


Figure 16.29: Case Turnaround Time Report (Case Owner)

To view Case Turnaround Time Report based on Feedback Type, click at the [Feedback Type](#) hyperlink.



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.

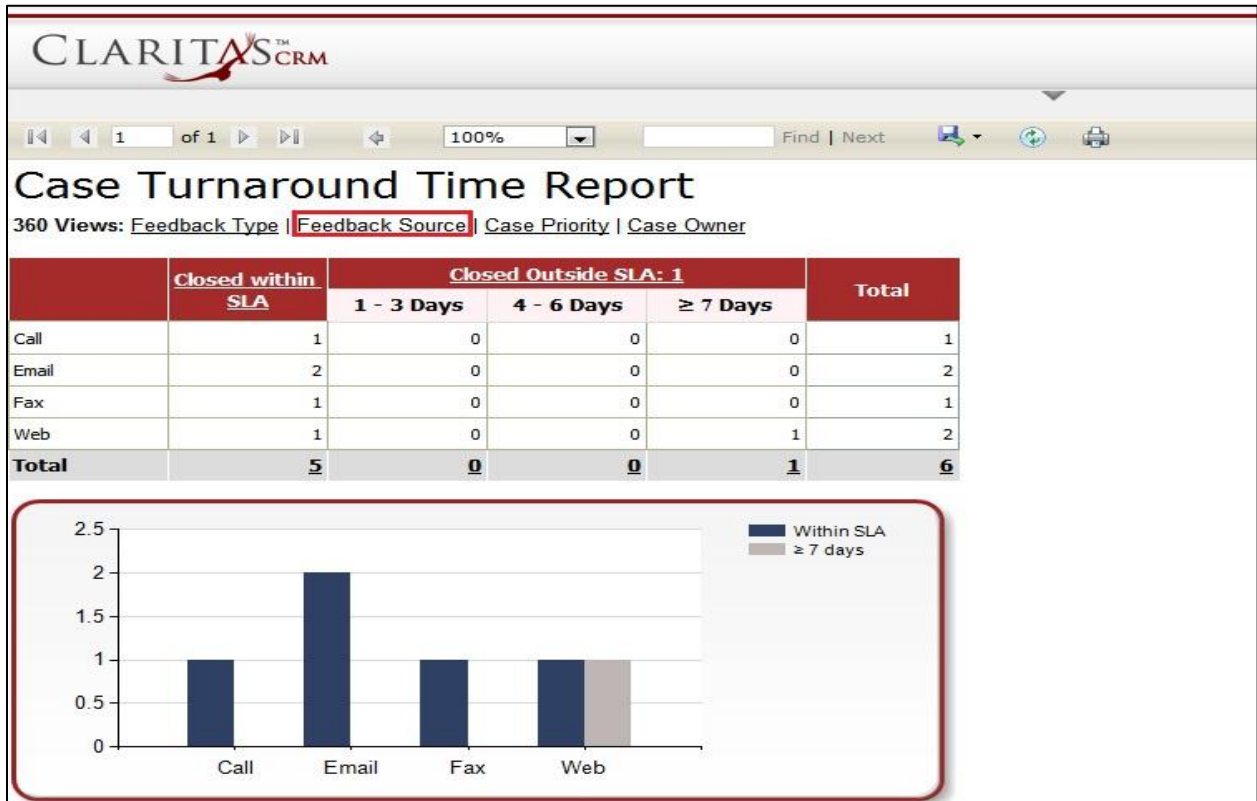


Figure 16.31: Case Turnaround (Feedback Source)

To view Case Turnaround Time Report based on Case Priority, click at the [Case Priority](#) hyperlink.

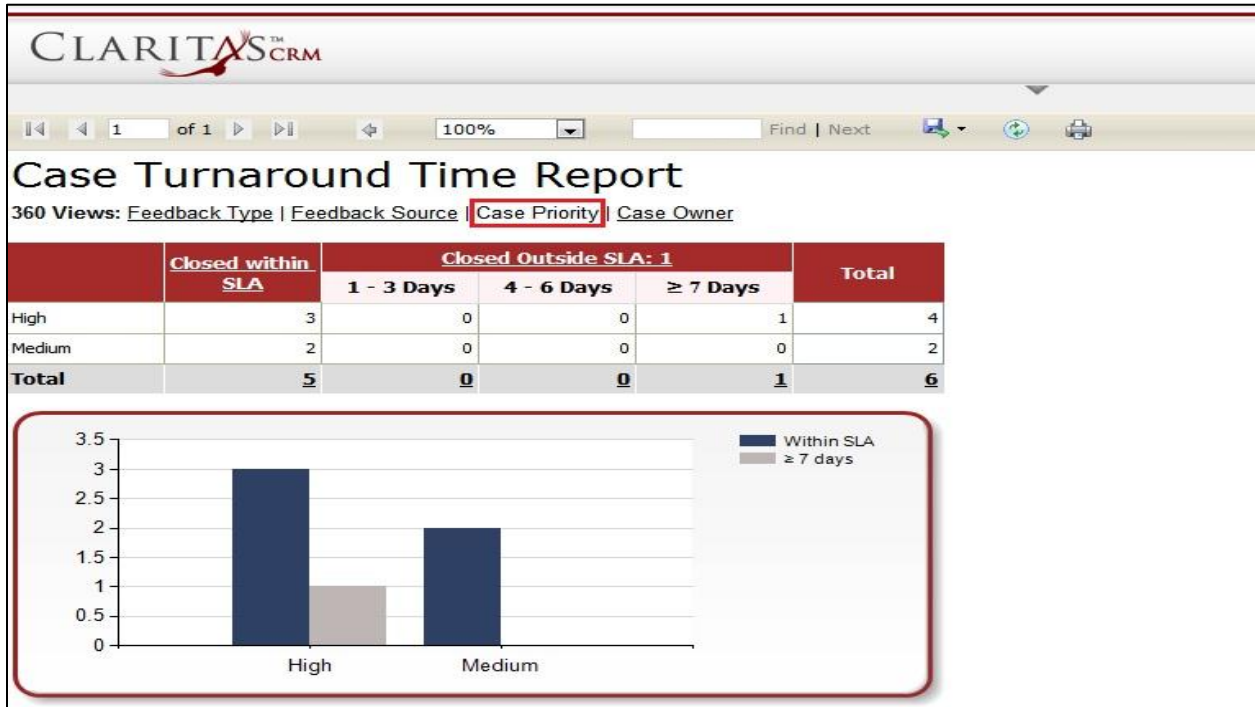




Figure 16.32: Case Turnaround (Case Priority)

User can also filter the record display by selecting the filters. Click at  and select the Field, Filter and Value. Then, click at the  button. Page will refresh and display result based on the filter entered.

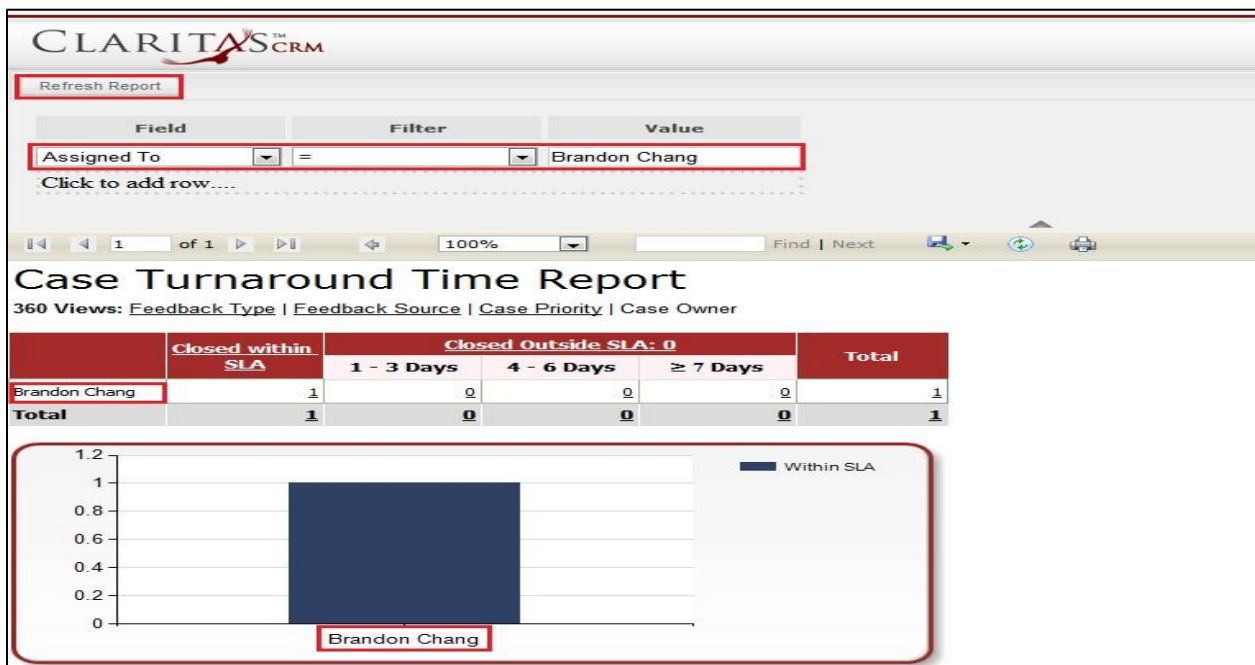






Figure 16.33: Filtered Case Turnaround Time Report



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**.

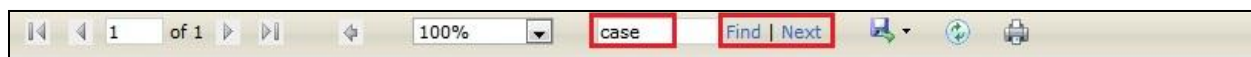


Figure 16.34: Find Textbox in Case Turnaround

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.

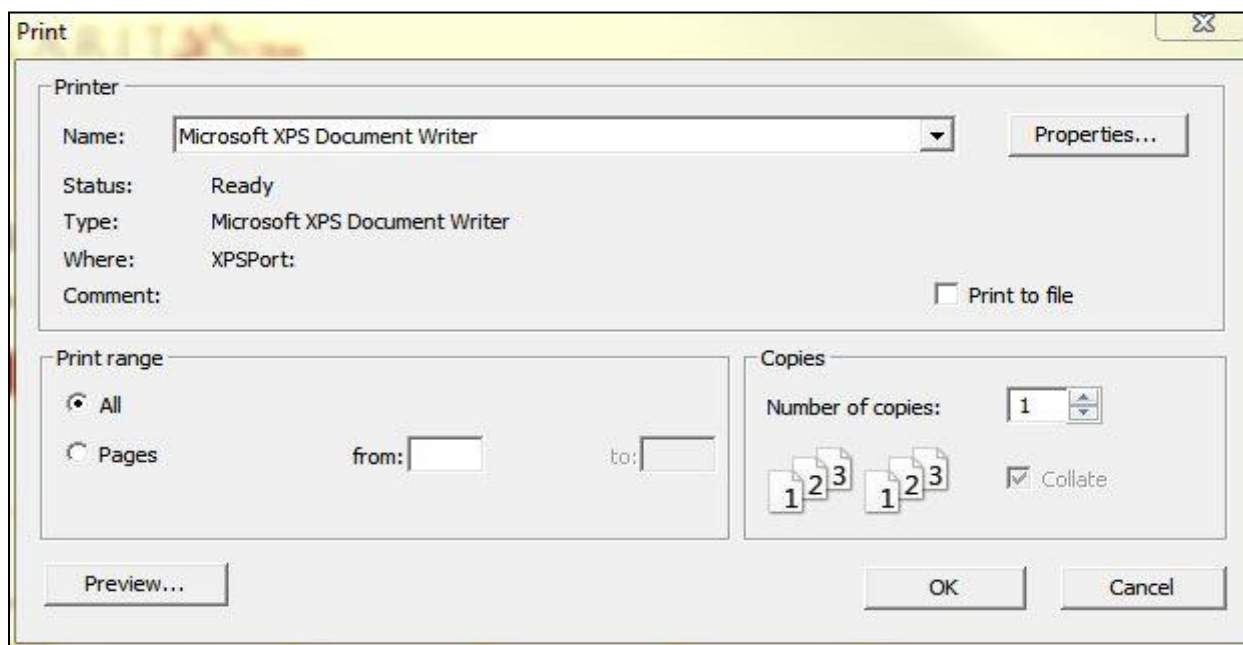


Figure 16.36: Print Popup

## 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).

The screenshot shows the Case Aging Detail Report window. The report is titled "Case Aging Detail Report" and shows 360 views. The report is filtered to show Outstanding cases. The table below shows the data for the Outstanding cases.

Date	Case	Type	Source	Customer	Company	Priority	Due Date	Status
<b>Total: 3</b>								
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
<b>Brandon Chang</b>								
<b>Total: 1</b>								
06/13/2011 06:04 AM	CRD20110613-27	Comment	Email		Netster MSC Sdn Bhd	High	12/20/2011 10:00 AM	Open - New
<b>FTSB Farid</b>								
<b>Total: 2</b>								
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
<b>FTSB Hackett</b>								
<b>Total: 1</b>								
07/13/2011 08:19 PM	CRD20110713-110	Comment	Web		ABC Co Ltd	High	07/14/2011 02:00 PM	Open - New
<b>Hadley</b>								
<b>Total: 1</b>								
09/08/2011 05:40 PM	CRD20110908-999	Comment	Call		Carlsberg Brewery Malaysia Berhad	High	09/09/2011 01:40 PM	Open - New
<b>Kelvin Leow</b>								
<b>Total: 1</b>								
07/27/2011 11:49 AM	CRD20110727-113	Comment	Email		ABC Co Ltd	Low	11/08/2011 11:49 AM	Open - New
<b>Kha Chun Fong</b>								
<b>Total: 1</b>								
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.

CLARITAS<sup>TM</sup> CRM

1 of 1 | 100% | Find | Next

### Case Aging Detail Report

360 Views: [Outstanding](#) | [Overdue](#)

Date	Case	Type	Source	Customer	Company	Priority	Due Date	Status
<b>Total: 2</b>								
10/10/2010 09:47 PM	CRD20111010-143	Comment	Web	dkgan@netstermsc.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
<b>FTSB Farid</b>								
<b>Total: 2</b>								
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
<b>FTSB Hackett</b>								
<b>Total: 1</b>								
07/13/2011 08:19 PM	CRD20110713-110	Comment	Web		ABC Co Ltd	High	07/14/2011 02:00 PM	Open - New
<b>Hadley</b>								
<b>Total: 1</b>								
09/08/2011 05:40 PM	CRD20110908-999	Comment	Call		Carlsberg Brewery Malaysia Berhad	High	09/09/2011 01:40 PM	Open - New
<b>Kelvin Leow</b>								
<b>Total: 1</b>								
07/27/2011 11:49 AM	CRD20110727-113	Comment	Email		ABC Co Ltd	Low	11/08/2011 11:49 AM	Open - New
<b>Kha Chun Fong</b>								
<b>Total: 1</b>								
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.

CLARITAS<sup>TM</sup> CRM

[Refresh Report](#)

Field	Filter	Value
Type	=	Comment
Source	=	Web

Click to add row....


1 of 1 | 100% | Find | Next


### Case Aging Detail Report


360 Views: [Outstanding](#) | [Overdue](#)


Date	Case	Type	Source	Customer	Company	Priority	Due Date	Status
<b>Total: 1</b>								
10/10/2010 09:47 PM	CRD20111010-143	Comment	Web	dkgan@netstermsc.com	ABC Co Ltd	High	10/11/2011 02:00 PM	Open - New
<b>FTSB Hackett</b>								
<b>Total: 1</b>								
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**.

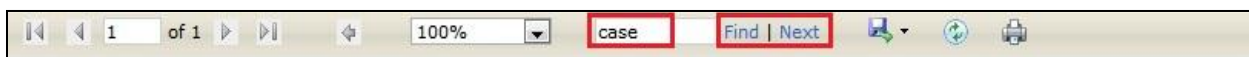


Figure 16.41: Find Textbox in Case Turnaround

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.

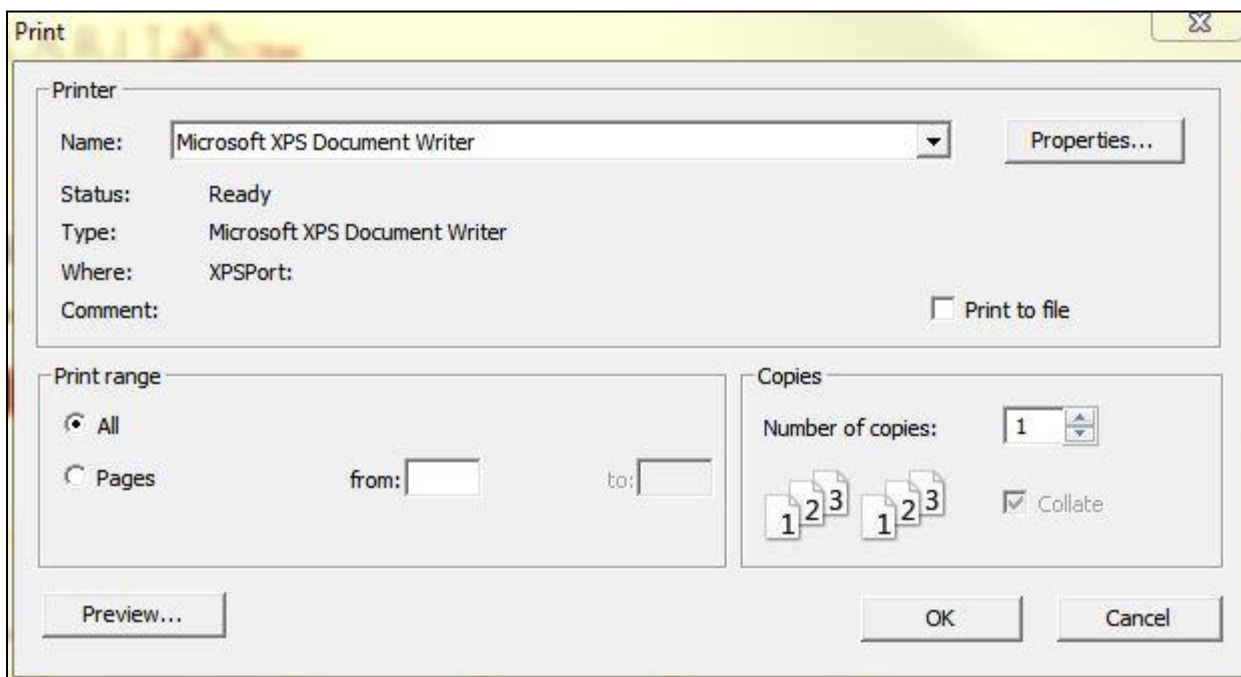


Figure 16.43: Print Popup

## Contact Report

### Contact Summary Report

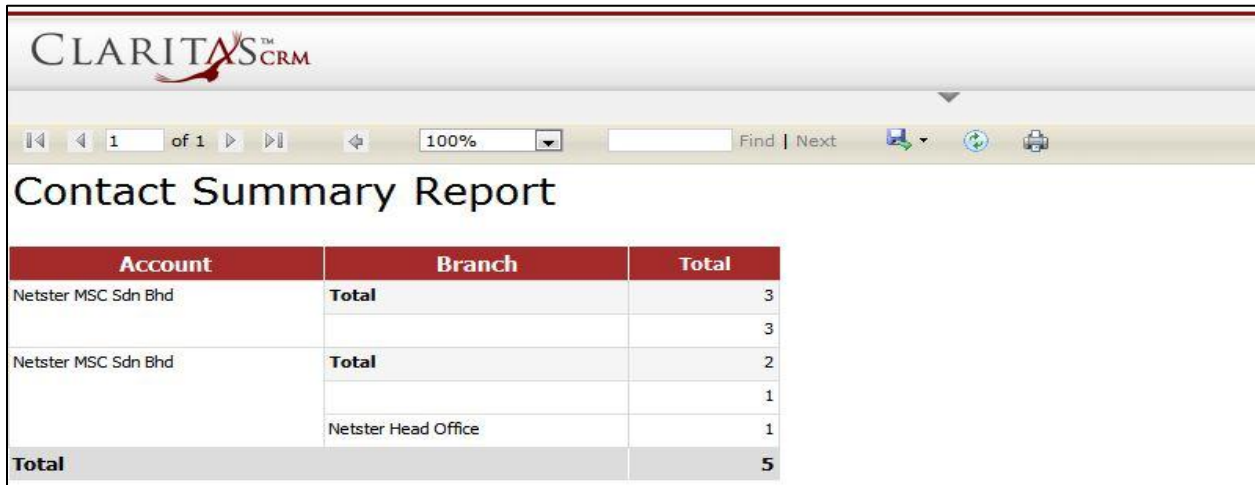
Click at **Report** menu at the Main Menu bar.



Figure 16.44: Report Menu in Main Menu



To view the **Contact Summary Report**, click at the [Contact Report 01: Contact Summary](#) hyperlink, Contact Summary Report window will pop up.

The report shows the Contact Summary Report of all Contacts available.

The image shows a screenshot of the 'Contact Summary Report' window. At the top, there is a navigation bar with the CLARITAS CRM logo and a search bar. Below the search bar, there is a table with three columns: 'Account', 'Branch', and 'Total'. The table contains data for 'Netster MSC Sdn Bhd' and a 'Total' row. The 'Total' row shows a total of 5 cases.

Account	Branch	Total
Netster MSC Sdn Bhd	<b>Total</b>	3
		3
Netster MSC Sdn Bhd	<b>Total</b>	2
		1
	Netster Head Office	1
<b>Total</b>		<b>5</b>

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  button. Page will refresh and display result based on the filter entered.

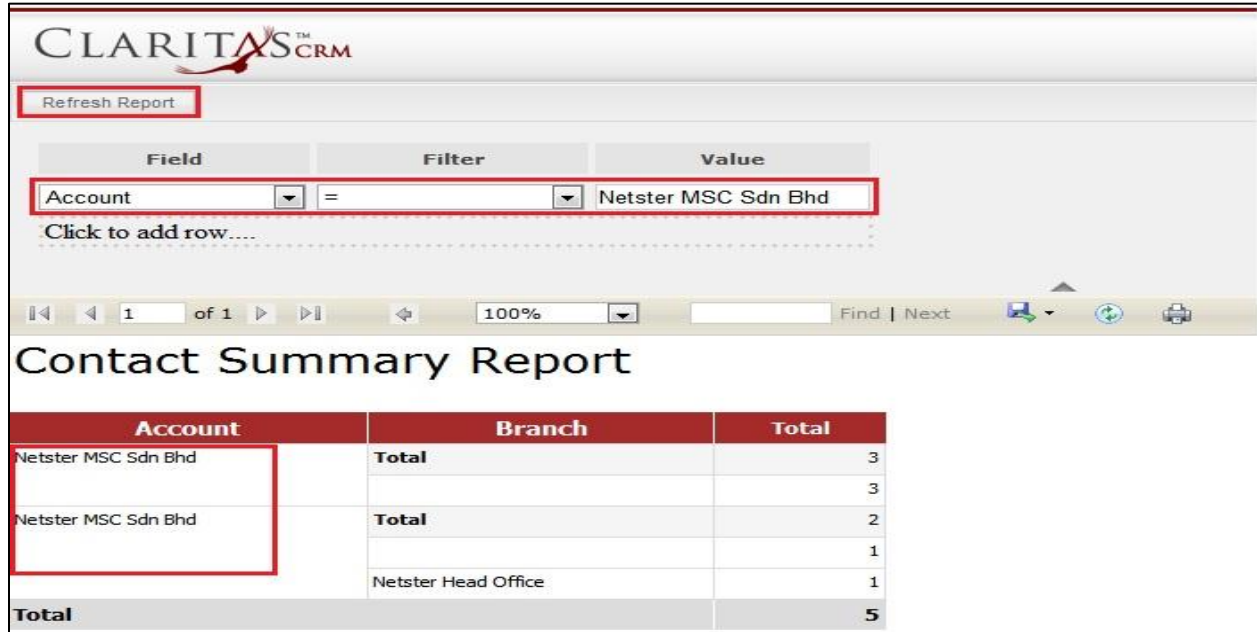






Figure 16.46: Filtered Contact Summary Report

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**.

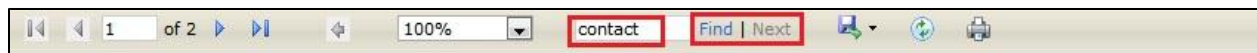


Figure 16.47: Find Textbox in Contact Summary Report

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.

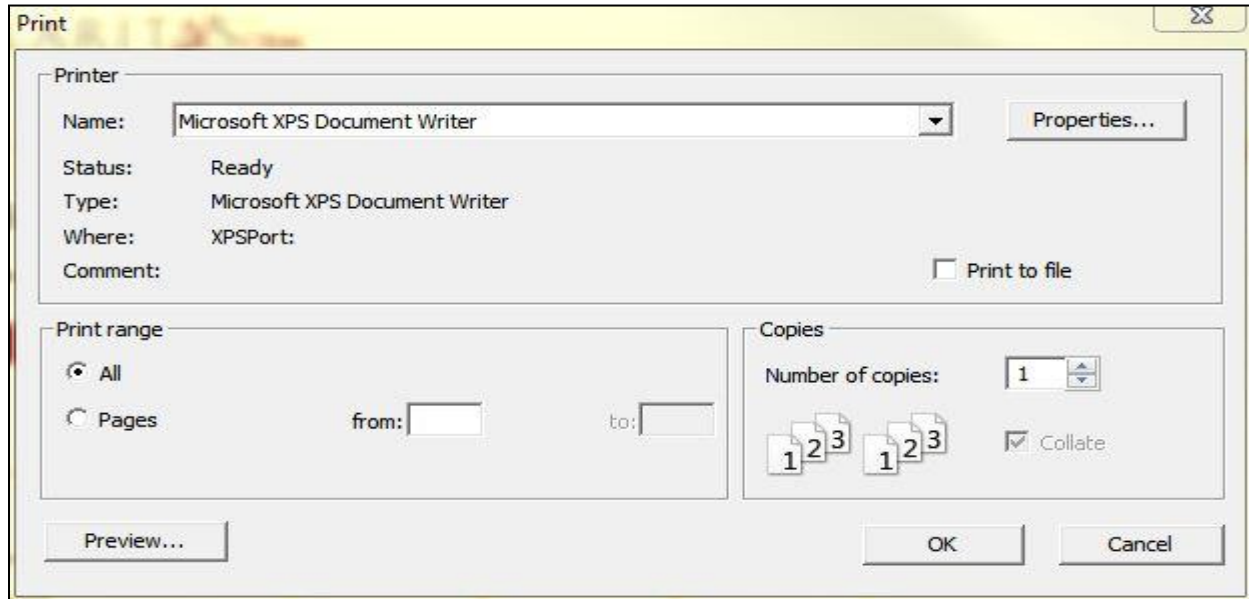


Figure 16.49: Print Popup

## 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.

The screenshot shows the 'Issue Aging Detail Report' window. It displays a table with columns: Date, Case, Issue, Type, Issue Category, Priority, Due Date, and Status. The table is filtered to show 'Outstanding' cases. The report shows 360 views and 1 overdue case. The table is grouped by customer names: FTSB Hadi, Kelvin Leow, Kenix Yip, and Kha Chun Fong.

Date	Case	Issue	Type	Issue Category	Priority	Due Date	Status
11/14/2011 02:49 PM	CRD20110613-26	CRD20110613-26-26	Enquiry	Account & Billing	High		New
<b>FTSB Hadi</b>							
09/21/2011 03:14 PM		-01	Compliment	Account & Billing	Low	09/22/2011 03:11 PM	New
<b>Kelvin Leow</b>							
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
<b>Kenix Yip</b>							
11/14/2011 02:51 PM	CRD20110613-26	CRD20110613-26-27	Comment	Pricing & Promotion>Out of stock	High		New
<b>Kha Chun Fong</b>							
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
<b>FTSB Hadi</b>							
09/21/2011 03:14 PM		-01	Compliment	Account & Billing	Low	09/22/2011 03:11 PM	New
<b>Total: 1</b>							
<b>Kelvin Leow</b>							
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
<b>Kha Chun Fong</b>							
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
<b>Total: 3</b>							

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  button. Page will refresh and display result based on the filter entered.


Field	Filter	Value
Type	=	compliment
Type	=	complaint


Click to add row....


Date	Case	Issue	Type	Issue Category	Priority	Due Date	Status
<b>FTSB Hadi</b>							
09/21/2011 03:14 PM		-01	Compliment	Account & Billing	Low	09/22/2011 03:11 PM	New
<b>Total: 1</b>							
<b>Kelvin Leow</b>							
06/14/2011 11:58 AM	CRD20110613-27	CRD20110613-27-05	Complaint	Account & Billing>Bill charge	High	06/16/2011 01:00 PM	New
<b>Total: 5</b>							

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.

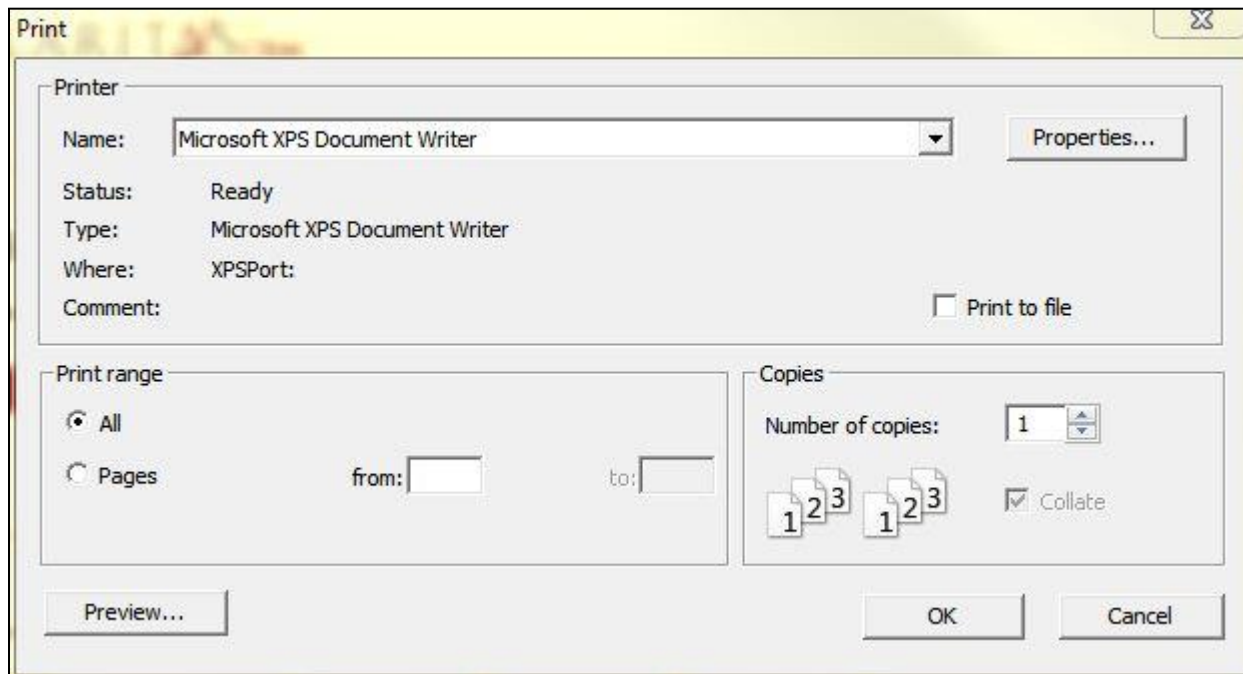


Figure 16.56: Print Popup



## 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 [Lead Report 01: Lead Summary](#) hyperlink, Lead Summary Report window will pop up.

The report shows the Lead Summary Report of all Leads available.

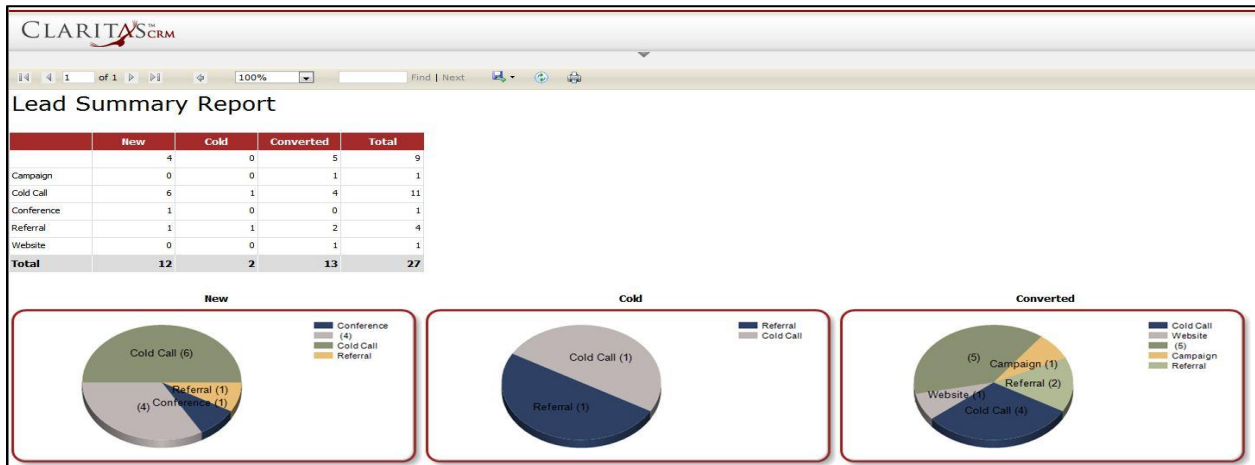




Figure 16.58: Lead Summary Report

User can also filter the record display by selecting the filters. Click at  and select the Field, Filter and Value. Then, click at the  button. Page will refresh and display result based on the filter entered.

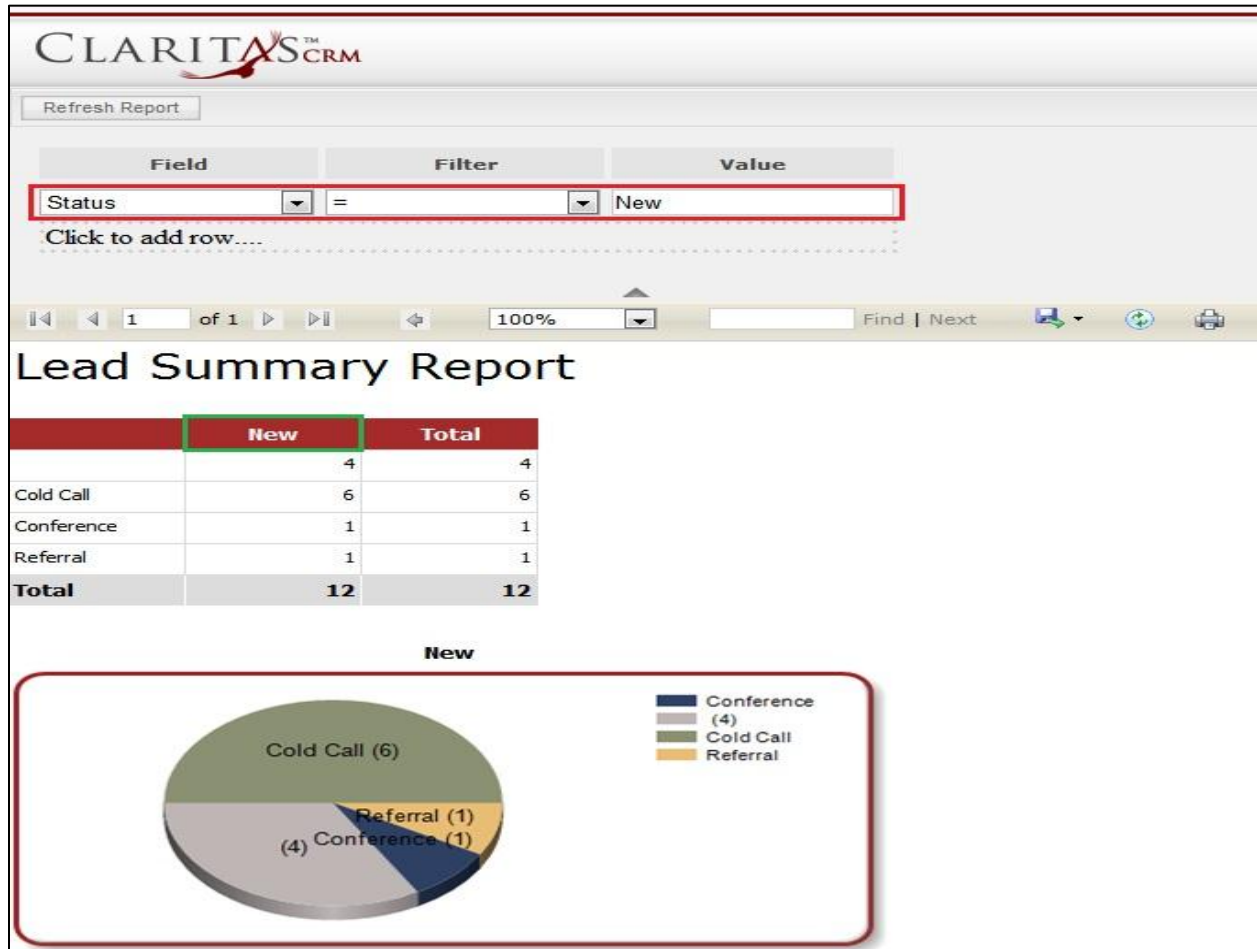






Figure 16.59: Filtered Lead Summary Report

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**.

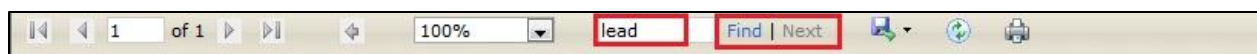


Figure 16.60: Find Textbox in Lead Summary Report

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.

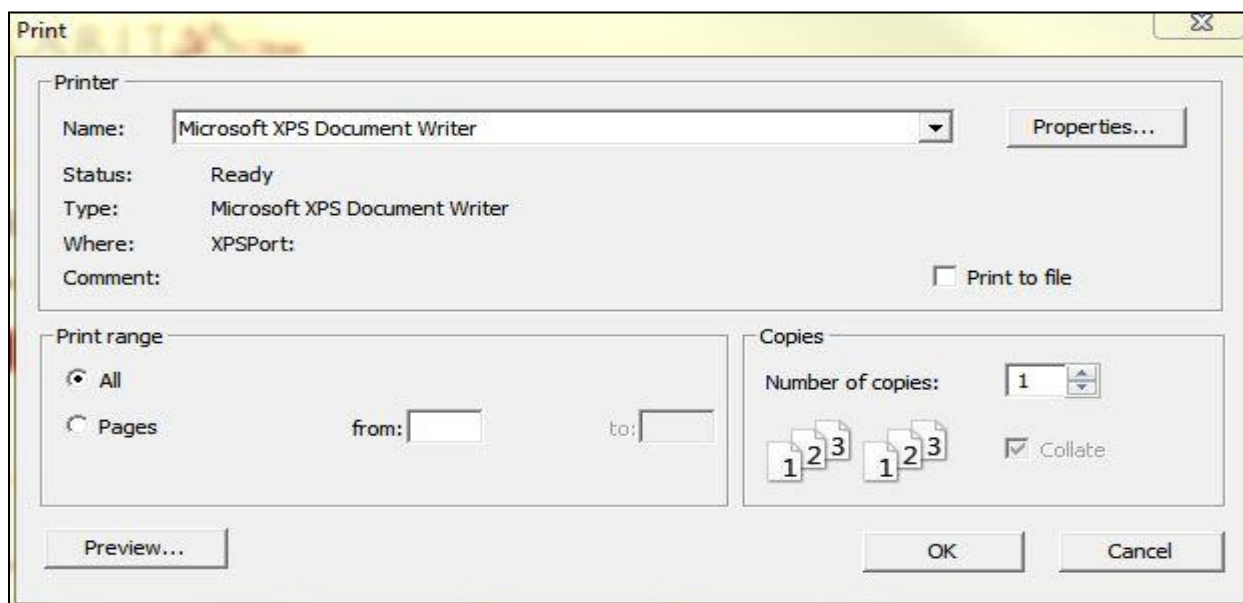


Figure 16.62: Print Popup

## 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 [Lead Report 02: Lead Demographic](#) hyperlink, Lead Demographic Report window will pop up.

The report shows the Lead Demographic Report of all Leads available.

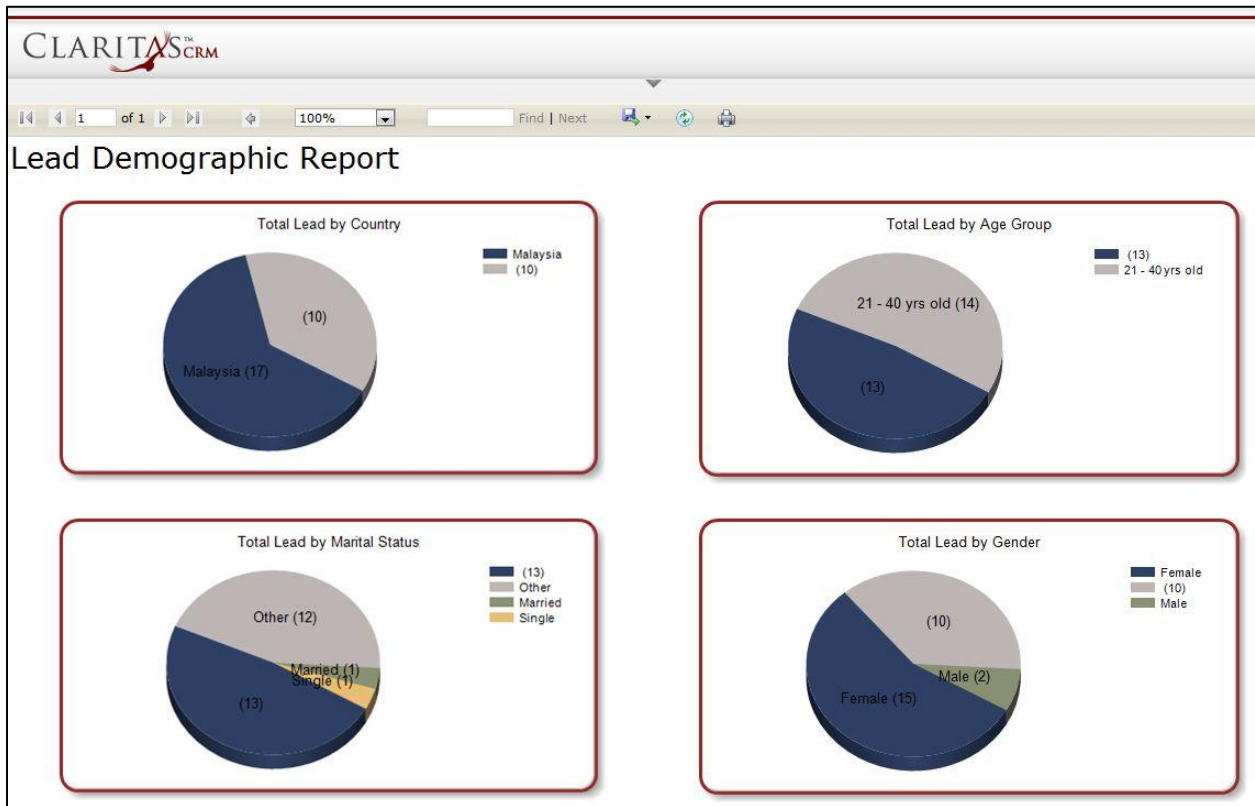




Figure 16.64: Lead Demographic Report

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.

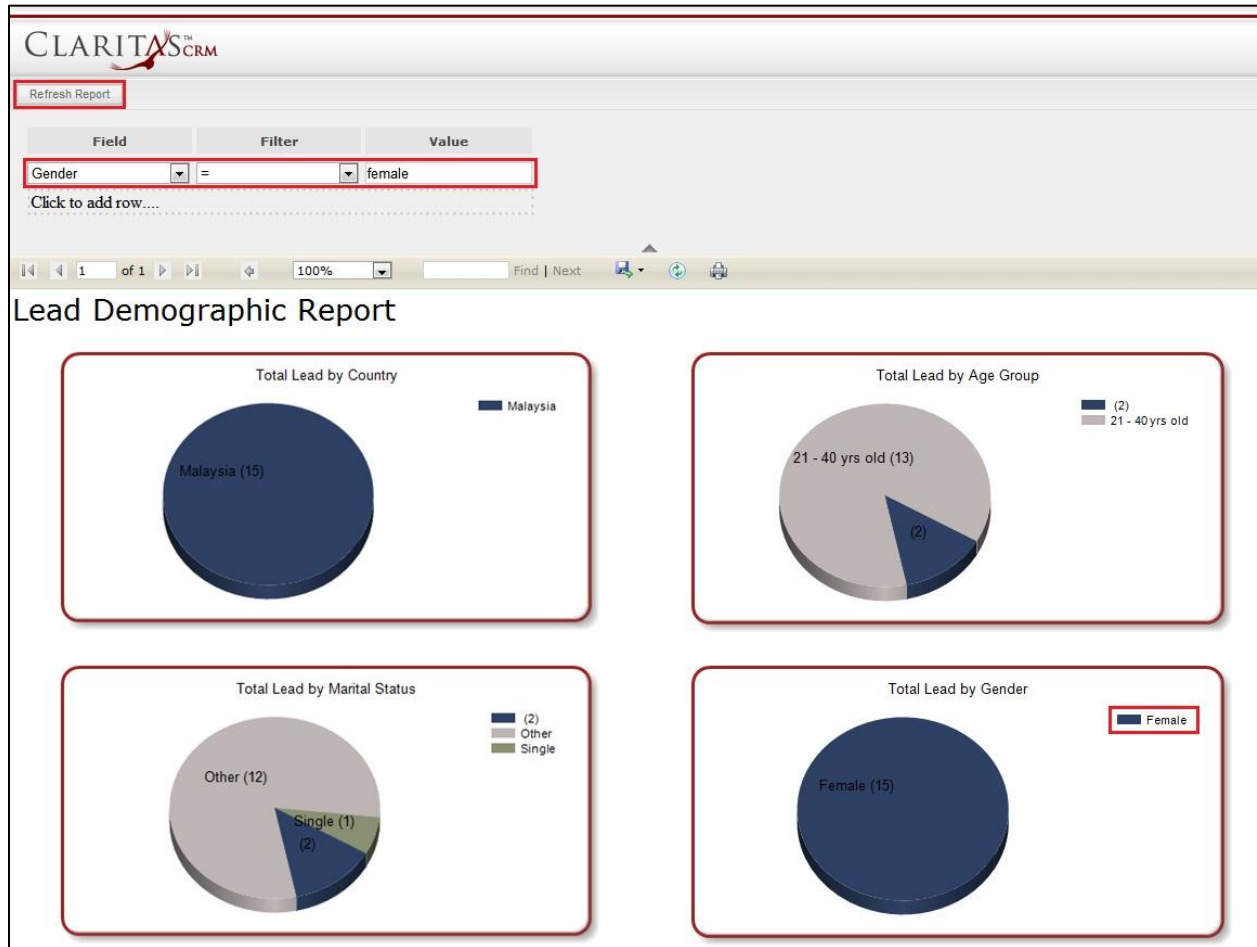






Figure 16.65: Filtered Lead Demographic Report

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**.

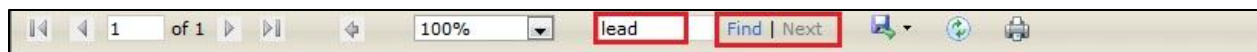


Figure 16.66: Find Textbox in Lead Demographic Report

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.

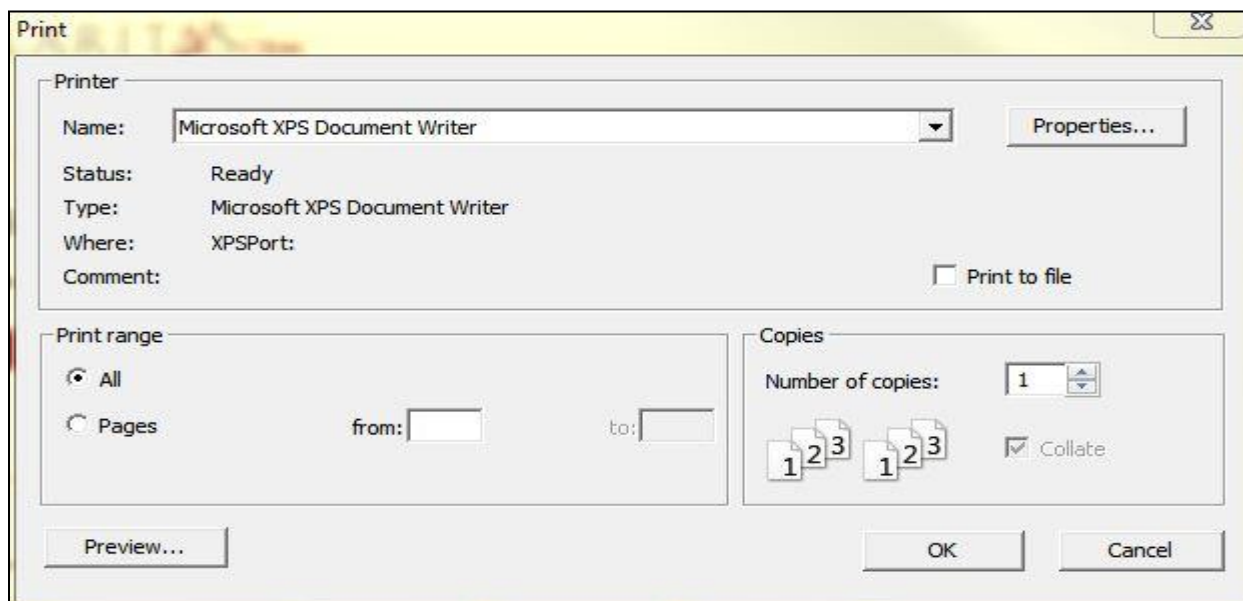


Figure 16.68: Print Popup

## Opportunity Report

### Opportunity Summary

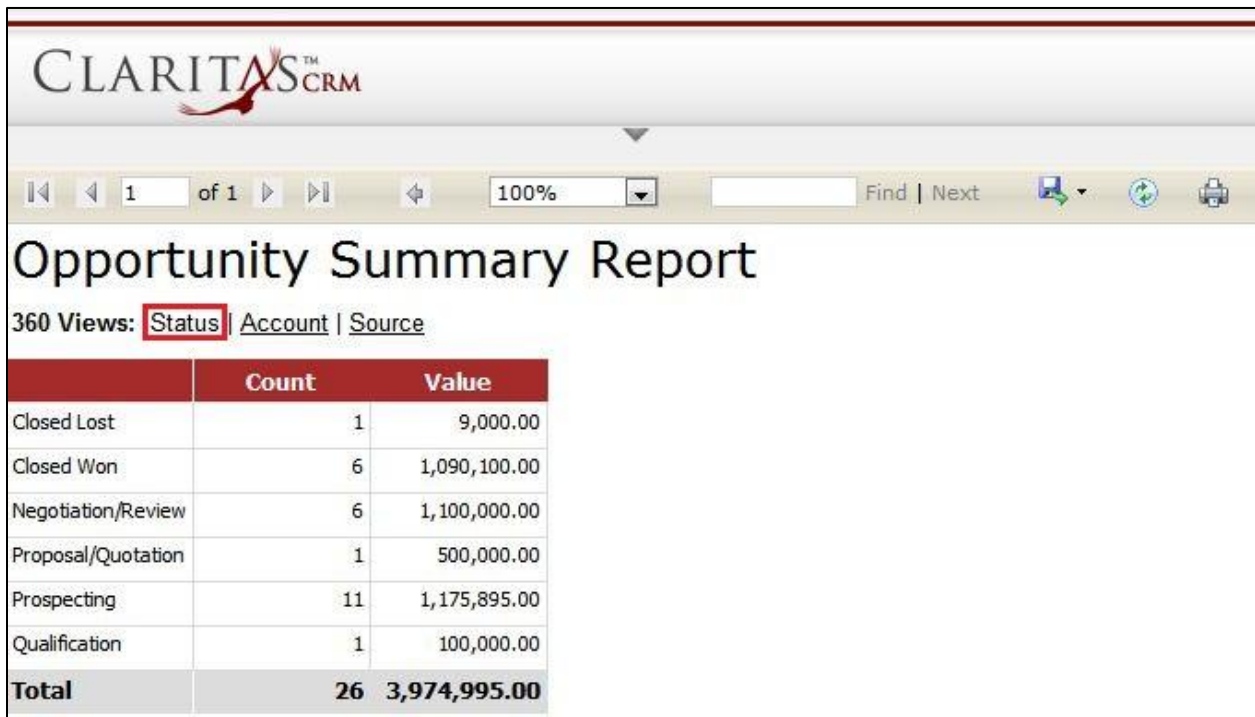
Click at **Report** menu at the Main Menu bar.



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).

The image shows a screenshot of the 'Opportunity Summary Report' window. At the top, there is a navigation bar with 'CLARITAS CRM' logo and a search bar. Below the navigation bar, there are navigation controls (back, forward, search) and a 'Find | Next' button. The main content area displays the title 'Opportunity Summary Report' and '360 Views: Status | Account | Source'. Below this is a table with columns for 'Status', 'Count', and 'Value'. The table data is as follows:

	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
<b>Total</b>	<b>26</b>	<b>3,974,995.00</b>

Figure 16.70: Opportunity Summary Report

To view Opportunity Summary Report based on Account, click at the [Account](#) hyperlink.

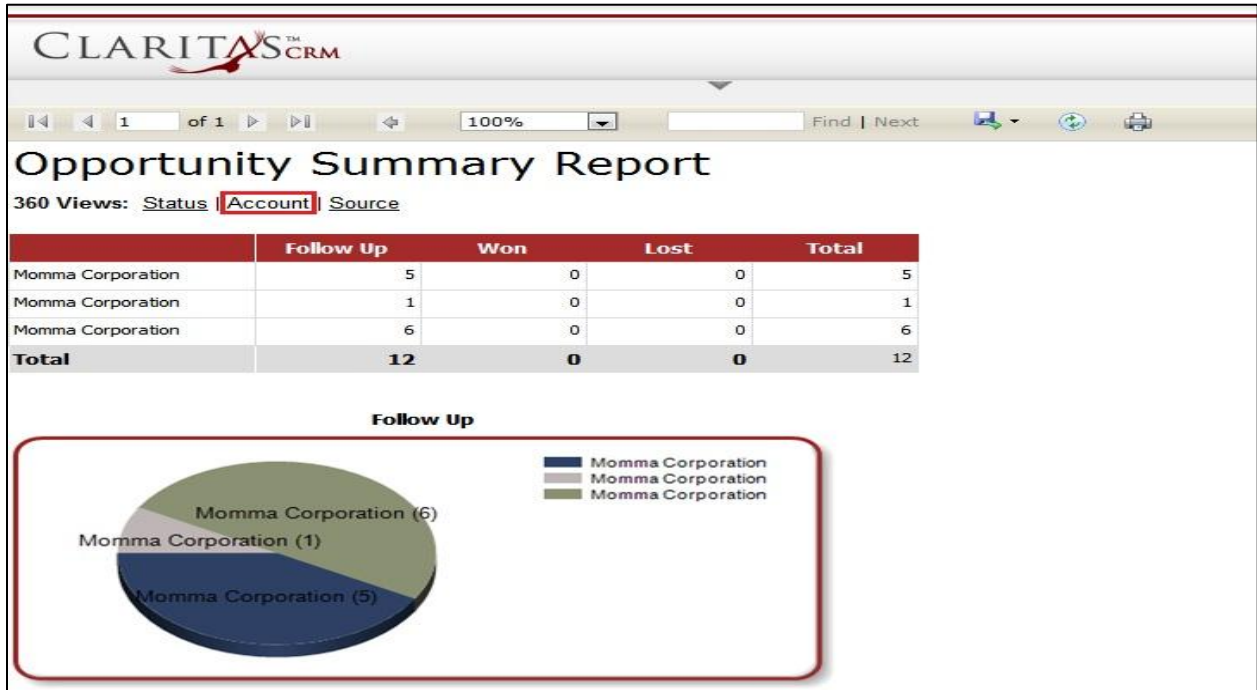


Figure 16.71: Opportunity Summary Report (Feedback Type)

To view Opportunity Summary Report based on Source, click at the [Source](#) hyperlink.

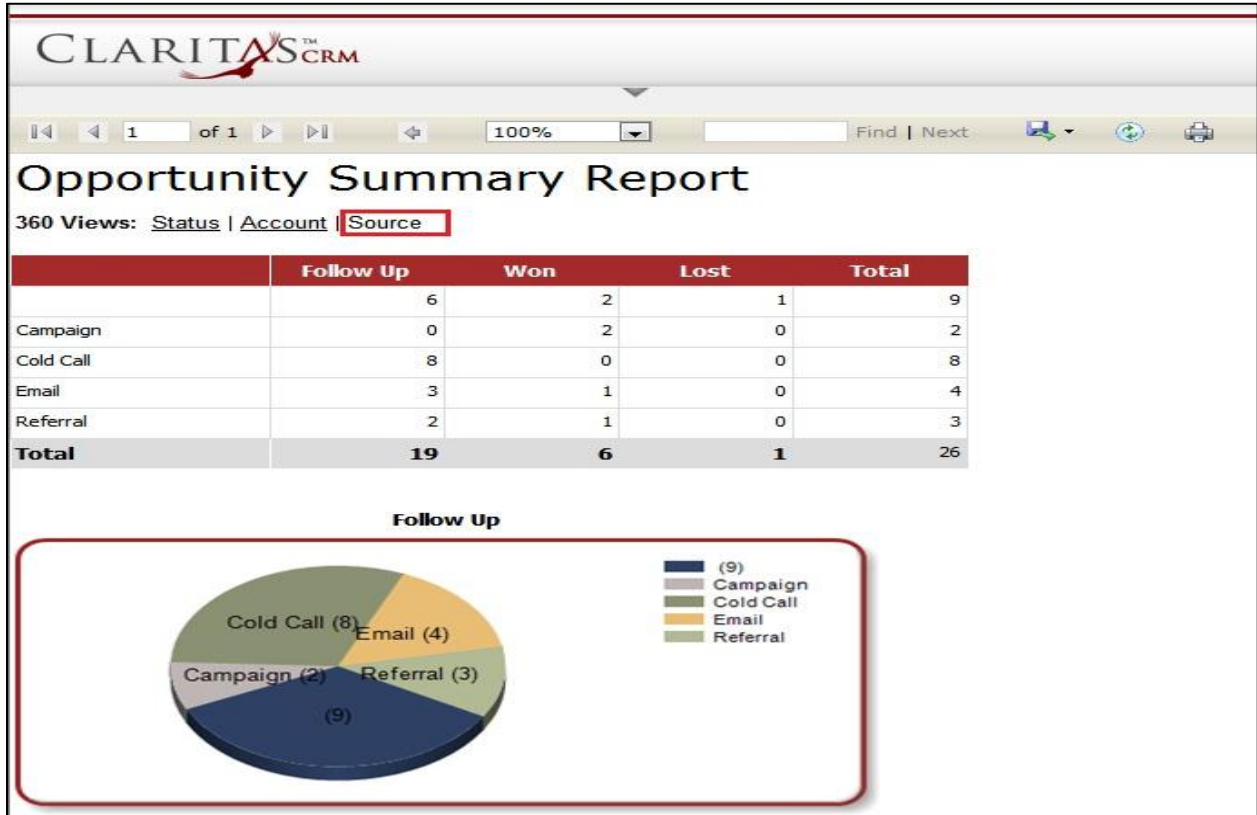


Figure 16.72: Opportunity Summary Report (Account)






User can also filter the record display by selecting the filters. Click at  and select the Field, Filter and Value. Then, click at the  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**.

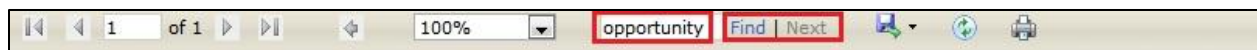



Figure 16.74: Find Textbox in Opportunity Summary Report

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.

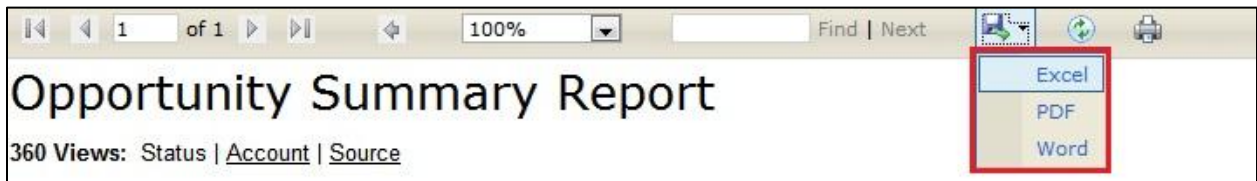



Figure 16.75: Export Opportunity Summary Report

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.

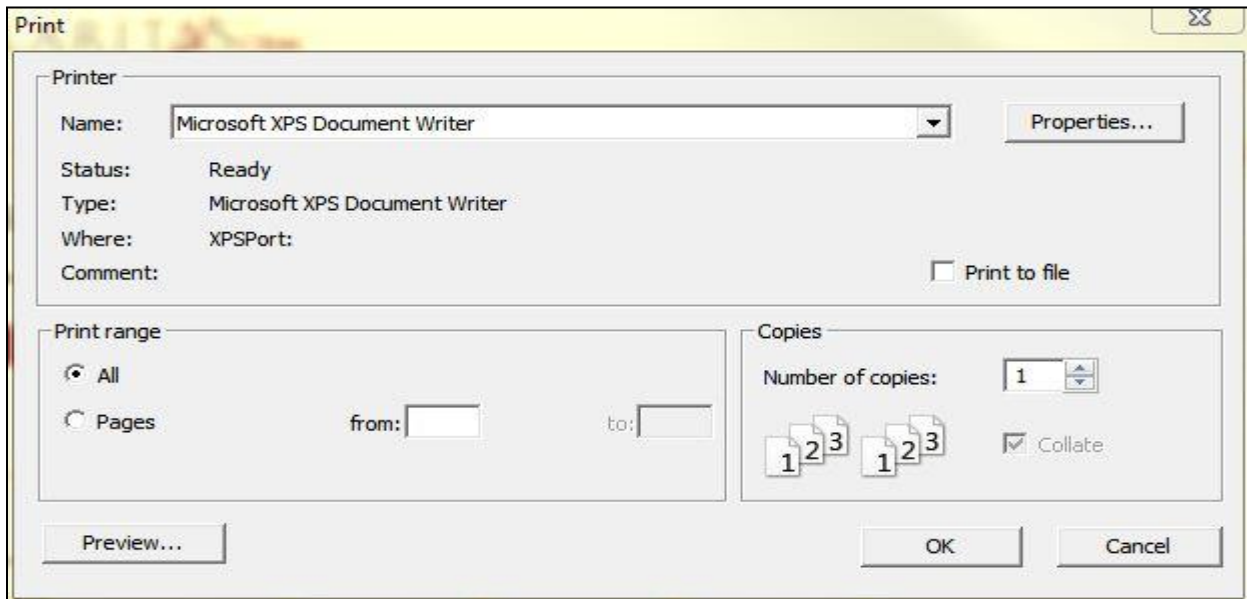


Figure 16.76: Print Popup

## 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.

The screenshot shows the 'Report Management' page. At the top, there are 'Actions', 'Create New', and 'Selected: 0'. Below is a table with columns: Module, Name, and Description. The table lists 15 reports, all under the 'Case' module. The 'Name' column contains hyperlinks for each report. At the bottom, there is a pagination bar showing 'Page 1 of 4' and 'Displaying 1 to 15 of 57 items'.

Module	Name	Description
Case	<a href="#">Case Aging By Source</a>	Case Aging custom report group by Source
Case	<a href="#">Case Trend By Priority</a>	Case Trend custom report group by Priority
Case	<a href="#">Case Turnaround By Type</a>	Case Turnaround custom report by Type
Case	<a href="#">Case Summary By Type</a>	Case Summary custom report group by Type
Case	<a href="#">Case Turnaround By Priority</a>	Case Turnaround custom report group by Priority
Case	<a href="#">Case Report 03: Case Aging Sum</a>	Case Report 03: Case Aging Summary
Case	<a href="#">Case Aging Detail Report</a>	Case Aging Detail Report
Case	<a href="#">Case Aging By Priority</a>	Case Aging custom report group by Priority
Case	<a href="#">Case Report 01: Case Summary</a>	Case Report 01: Case Summary
Case	<a href="#">Case Detail Report</a>	Case Detail Report
Case	<a href="#">Case Report 02: Case Trend</a>	Case Report 02: Case Trend
Case	<a href="#">Case Report 04: Case Turnarounc</a>	Case Report 04: Case Turnaround Summary
Case	<a href="#">Case Trend By Type</a>	Case Trend custom report group by Type
Case	<a href="#">Case Turnaround By Source</a>	Case Turnaround custom report group by Source
Case	<a href="#">Case Aging By Type</a>	Case Aging custom report group by Type

Figure 16.78: Report Listing

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

The screenshot shows the 'Report Management' page with a red box highlighting the 'Opportunity Summary Report' in the 'Name' column. The table has columns: Module, Name, and Description. The 'Name' column contains hyperlinks. The pagination bar shows 'Page 1 of 1' and 'Displaying 1 to 3 of 3 items'.

Module	Name	Description
Opportunity	<a href="#">Opportunity Summary Report</a>	Opportunity Summary Report
Opportunity	<a href="#">Opportunity Summary Report</a>	Opportunity Summary Report
Opportunity	<a href="#">Opportunity Report 01: Opportunit</a>	Opportunity Report 01: Opportunity Summary

Figure 16.79: Report Name Hyperlink

After clicking the [Report Name](#) hyperlink, windows showing the report will popup.

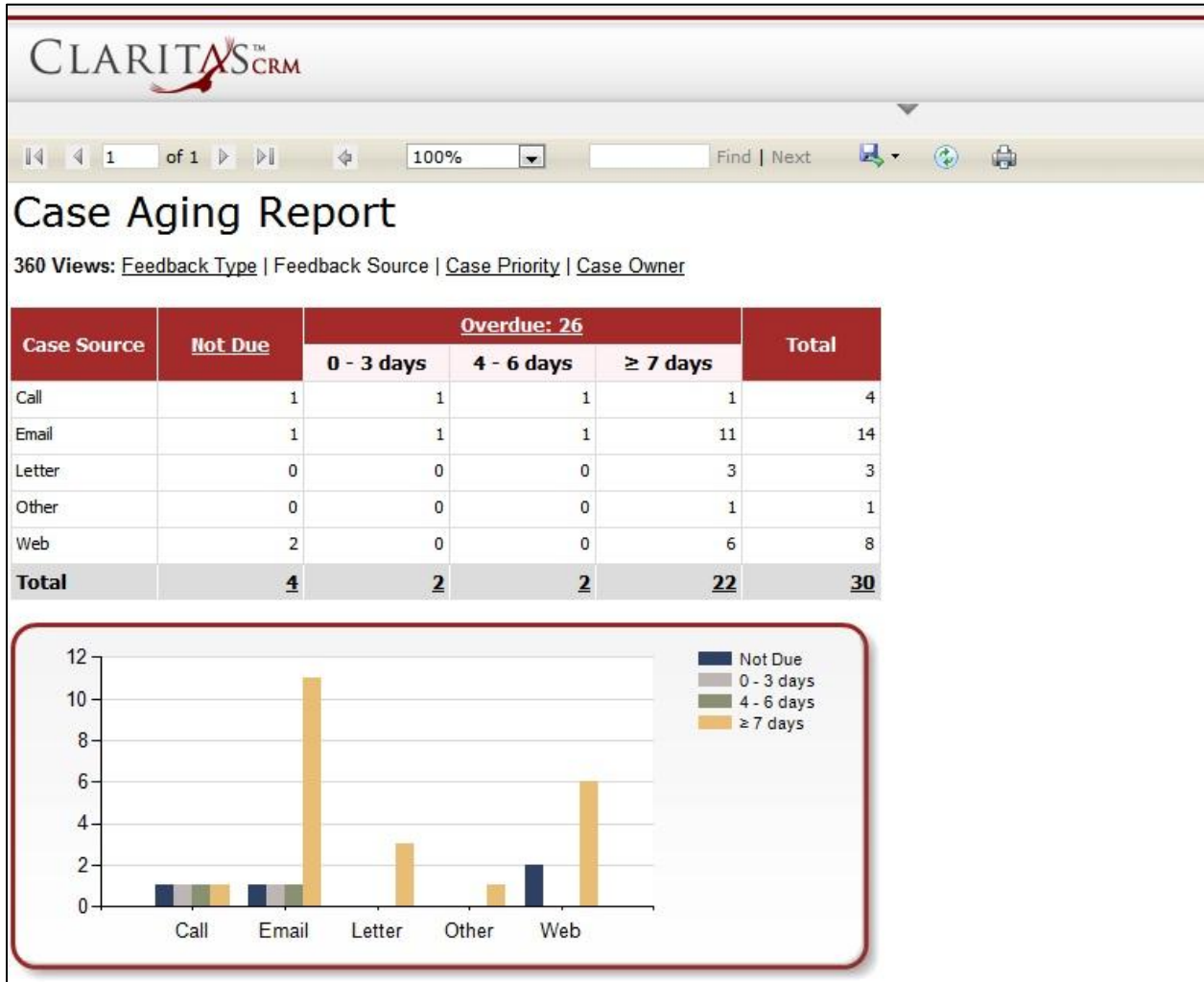






Figure 16.80: Report Popup


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.



Field	Value
Module	
--Please Select One--	
Module	
Name	
Description	

Module

Search Reset

Page 1 of 4 Displaying 1 to 15 of 57 items

**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.

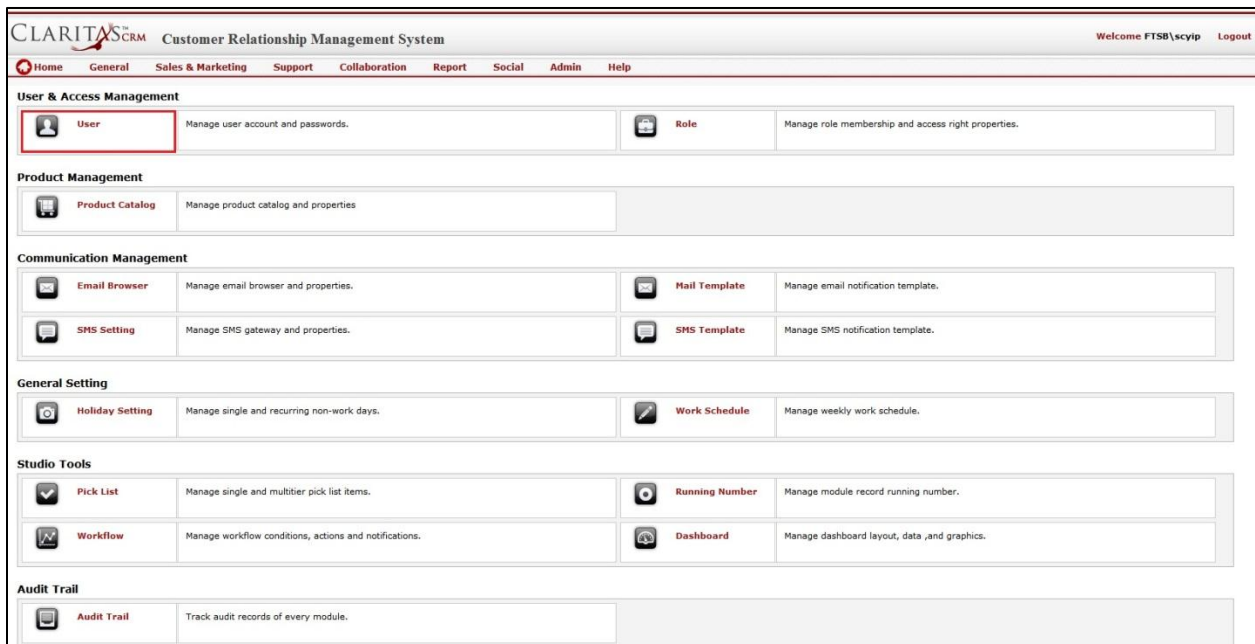


Figure 17.2: User Menu in Admin Management Page

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

The screenshot shows the User Maintenance page with a table of users. The table has columns for User Name, First Name, Last Name, Role, Active, Mobile, Email, and Reporting To. The data is as follows:

	User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
<input type="checkbox"/>	ftsb\bchang	Brandon	Chang	TEST2	Active	+60127796363	bchang@netstermsc.com	
<input type="checkbox"/>	FTSB\ckgan	Gan	Chin Kiat	TEST2	Active	+60169343377	ckgan@netstermsc.com	<a href="#">Yew Lun Woo</a>
<input type="checkbox"/>	Rsb\Farid	FTSB	Farid	TestTesting	Active	+60183372288	farid@netstermsc.com	<a href="#">Kelvin Leow</a>
<input type="checkbox"/>	ftsb\kenix	SC	Yip	TestTesting	Active	0199883553	scyip@netstermsc.com	<a href="#">Kenix Yip</a>
<input type="checkbox"/>	FTSB\test	Farid	Faisal	TEST2	Active	+60154498765	farid@netstermsc.com	<a href="#">Yew Lun Woo</a>

At the bottom of the table, it says "Page 1 of 1" and "Displaying 1 to 5 of 5 items".

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.

User Maintenance								
Actions		Create New	Selected: 0					
	User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
<input type="checkbox"/>	ftsb\bcchang	<a href="#">Brandon</a>	<a href="#">Chang</a>	TEST2	Active	+60127796363	bcchang@netstermsc.com	
<input type="checkbox"/>	FTSB\ckgan	<a href="#">Gan</a>	<a href="#">Chin Kiat</a>	TEST2	Active	+60169343377	ckgan@netstermsc.com	<a href="#">Yew Lun Woo</a>
<input type="checkbox"/>	ftsb\farid	<a href="#">FTSB</a>	<a href="#">Farid</a>	TestTesting	Active	+60183372288	farid@netstermsc.com	<a href="#">Kelvin Leow</a>
<input type="checkbox"/>	ftsb\kenix	<a href="#">SC</a>	<a href="#">Yip</a>	TestTesting	Active	0199883553	scyip@netstermsc.com	<a href="#">Kenix Yip</a>
<input type="checkbox"/>	FTSB\test	<a href="#">Farid</a>	<a href="#">Faisal</a>	TEST2	Active	+60154498765	farid@netstermsc.com	<a href="#">Yew Lun Woo</a>

Page 1 of 1    Displaying 1 to 5 of 5 items

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**.

User Maintenance > Brandon Chang

Edit   Cancel   Copy New   Refresh   Reset Password

**User Profile**

User Name	ftsb\bcchang	Allow Login	True
Salutation	Mr	Active	Active
First Name	Brandon	Role	TEST2
Last Name	Chang	Email	bcchang@netstermsc.com
		Website	

**Business Information**

Job Title	Senior Consultant	Reporting To	
Department		Employment Since	01/01/2008
Organization	Sales & Marketing > Business Channel Development	Employment Tenure	3 Year(s) 10 Month(s)

**Correspondence Address**

Home		Business	
Address 1		Address 1	
Address 2		Address 2	
Address 3		Address 3	
City		City	
Postcode		Postcode	
State		State	
Country		Country	
Home		Business	
Mobile	+60127796363	Fax	

**Other Information**

NRIC		Gender	Male
Marital Status		Date Of Birth	12/07/1974
Emergency Contact		Age	36 Years Old
Note			

**System Information**

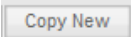
Created Date	03/21/2011 11:53:33 AM	Created By	ftsb\kcfong
Last Updated Date	11/16/2011 03:16:36 PM	Last Updated By	FTSB\scyip

Activities

History

Direct Reports

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  button at **User Maintenance Detail** page. A message showing "New password has been sent to [User\_Email]" will popup.

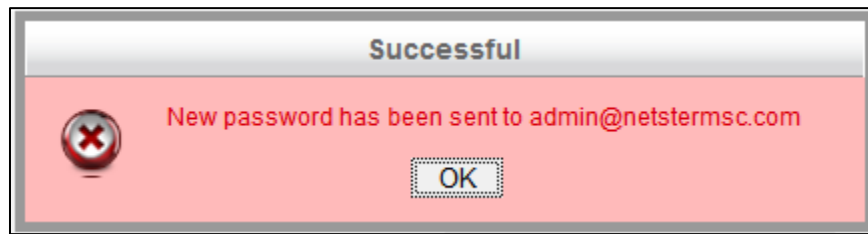


Figure 17.6: Reset Password Popup

To create a new user, click at  menu at the top of the User Listing.

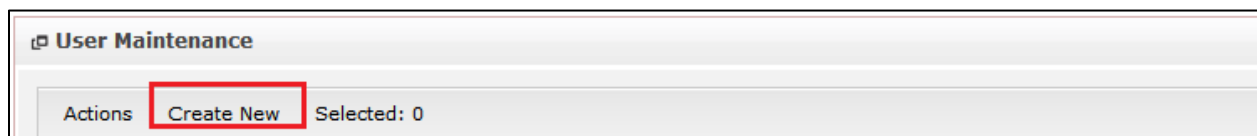


Figure 17.7: Create New User Menu

After clicking  menu, page will navigate to **User Maintenance** page. Enter the relevant details and click  button to save the changes and navigates to **User Maintenance Detail** page or click  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**.

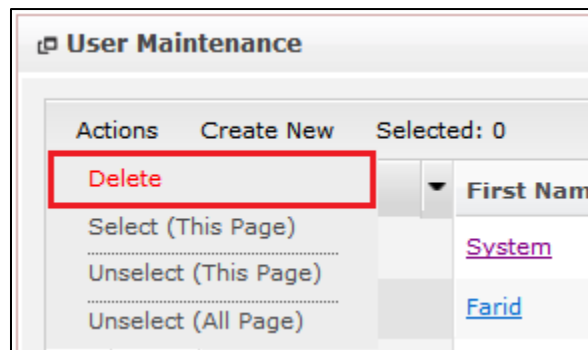


Figure 17.9: Action > Delete Menu

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)**.

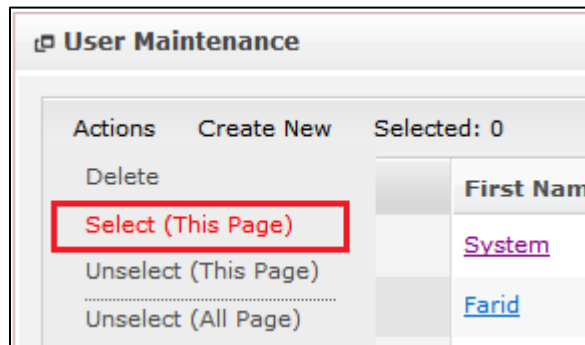


Figure 17.11: Actions > Select (This Page) Menu

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

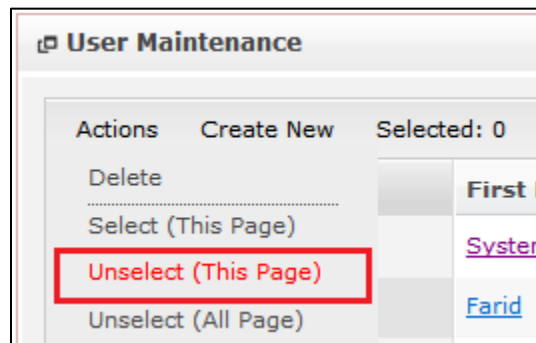


Figure 17.12: Actions > Unselect (This Page) Menu

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

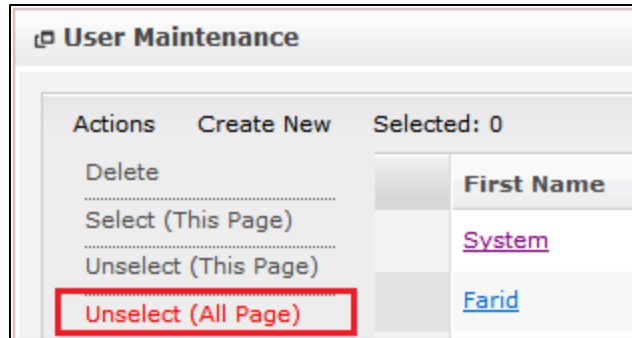






Figure 17.13: Actions > Unselect (All Pages) Menu


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.

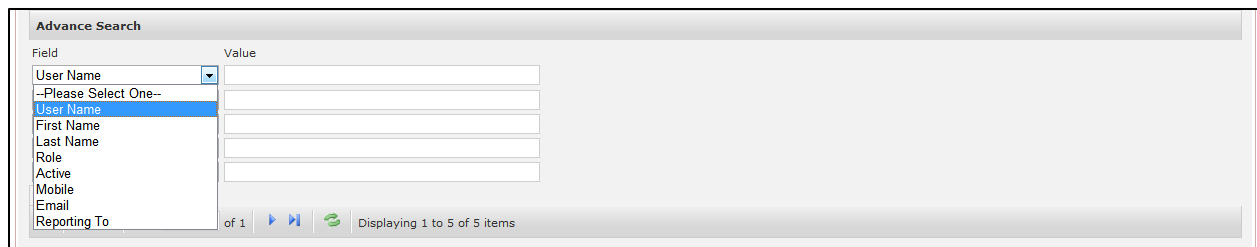


Figure 17.14: User Advance Search

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  button to save the changes and navigates back to **User Maintenance Detail** page or click  button to save the changes and navigates to the **User Maintenance Edit** page of the next User. Or click  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**

<b>User Profile</b>	
<b>User Name</b>	<input type="text" value="scyip"/>
Salutation	--Please Select One--
First Name	<input type="text" value="Kenix"/>
<b>Last Name</b>	<input type="text" value="Yip"/>
<b>Allow Login</b>	<input type="text" value="True"/>
<b>Active</b>	<input type="text" value="Active"/>
<b>Role</b>	<input type="text" value="Administrator"/>
Email	<input type="text"/>
Website	<input type="text"/>

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."

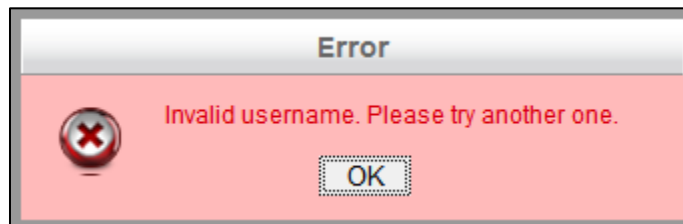


Figure 17.18: Create User - User Details

- **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.

Password	
New Password	.....
Confirm 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.

Business Information			
Job Title	Software Tester	Reporting To	kenix
Department	Quality Control	Employment Since	12/01/2010
Organization	--Please Select One--	Employment Tenure	0 Year(s) 8 Month(s)

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)

Correspondence Address	
Home	
Address 1	246-248, Block A, Kelana Center Point
Address 2	No. 3, Jalan SS7/19,
Address 3	
City	Kelana Jaya
Postcode	47301
State	Selangor
Country	Malaysia
Home	0378054185
Mobile	017-8054185
Business	
Address 1	246-248, Block A, Kelana Center Point
Address 2	No. 3, Jalan SS7/19,
Address 3	
City	Kelana Jaya
Postcode	47301
State	Selangor
Country	Malaysia
Business	0378054186
Fax	0378054184

Figure 17.21: Create User – Correspondence Address

## 5) Other Information





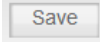
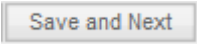
- For user to enter some **Other Information** of the user such as **NRIC, Marital Status, Emergency Contact, Gender, Date of Birth, Age** and **Note**. (Optional)
- **Age** field will be **auto-calculated** based on the **Date of Birth** field.

Other Information	
NRIC	801010145555
Gender	Male
Marital Status	Single
Date Of Birth	10/10/1980
Emergency Contact	03-78051222
Age	30 Years Old
Note	<div style="border: 1px solid #ccc; padding: 5px;"> <p>some note</p> </div>

Figure 17.22: Create User – Other Information

To cancel creating New User, click  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  button in **User Maintenance Edit** page. After clicking **Edit**  button or  button, page will navigate to **User Maintenance** page. Edit the relevant details and click  button to save the changes and navigates back to **User Maintenance Detail** page or click  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**

User Profile	
User Name	Admin
Salutation	--Please Select One--
First Name	System
<b>Last Name</b>	Admin
Change Password	<input type="checkbox"/>
<b>Allow Login</b>	True
<b>Active</b>	Active
<b>Role</b>	Administrator
Email	admin@netstermsc.com
Website	

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.

User Maintenance > System Admin

Save Cancel

**User Profile**

User Name	Admin	<b>Allow Login</b>	True
Salutation	--Please Select One--	<b>Active</b>	Active
First Name	System	<b>Role</b>	Administrator
<b>Last Name</b>	Admin	Email	admin@netstermsc.com
Change Password	<input checked="" type="checkbox"/>	Website	

**Password**

Old Password	
New Password	
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.

**Business Information**

Job Title	Software Tester	Reporting To	kenix
Department	Quality Control	Employment Since	12/01/2010
Organization	--Please Select One--	Employment Tenure	0 Year(s) 8 Month(s)

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)

Correspondence Address		Business	
Home		Business	
Address 1	246-248, Block A, Kelana Center Point	Address 1	246-248, Block A, Kelana Center Point
Address 2	No. 3, Jalan SS7/19,	Address 2	No. 3, Jalan SS7/19,
Address 3		Address 3	
City	Kelana Jaya	City	Kelana Jaya
Postcode	47301	Postcode	47301
State	Selangor	State	Selangor
Country	Malaysia	Country	Malaysia
Home	0378054185	Business	0378054186
Mobile	017-8054185	Fax	0378054184

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.

Other Information	
NRIC	801010145555
Marital Status	Single
Emergency Contact	03-78051222
Note	some note
Gender	Male
Date Of Birth	10/10/1980
Age	30 Years Old

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.*

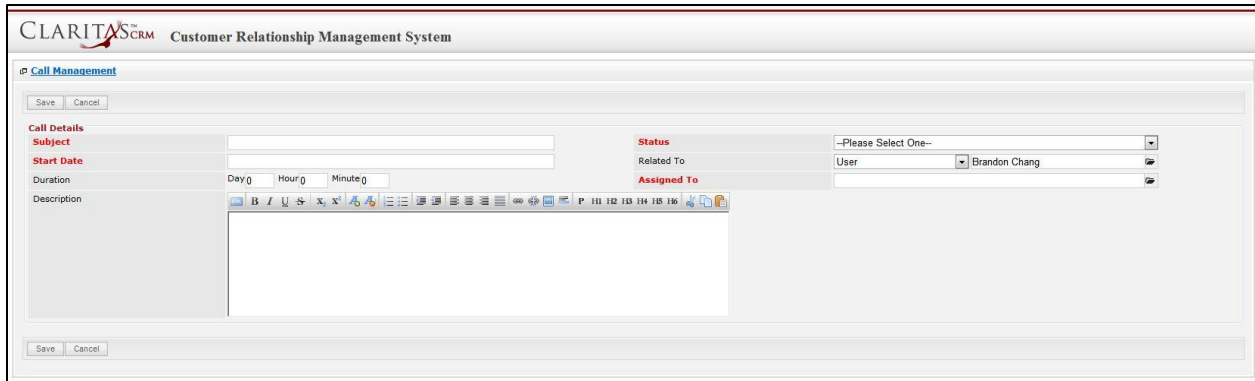


Figure 17.28: New Call Management Popup

- 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.

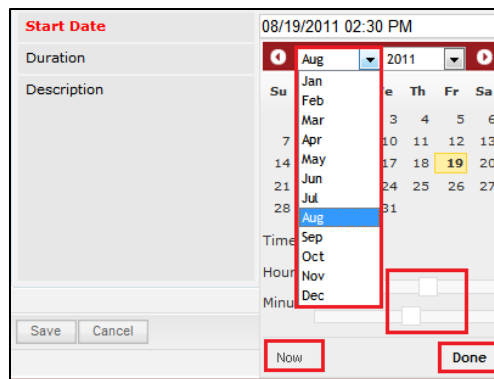


Figure 17.29: Start Date Time


- **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:

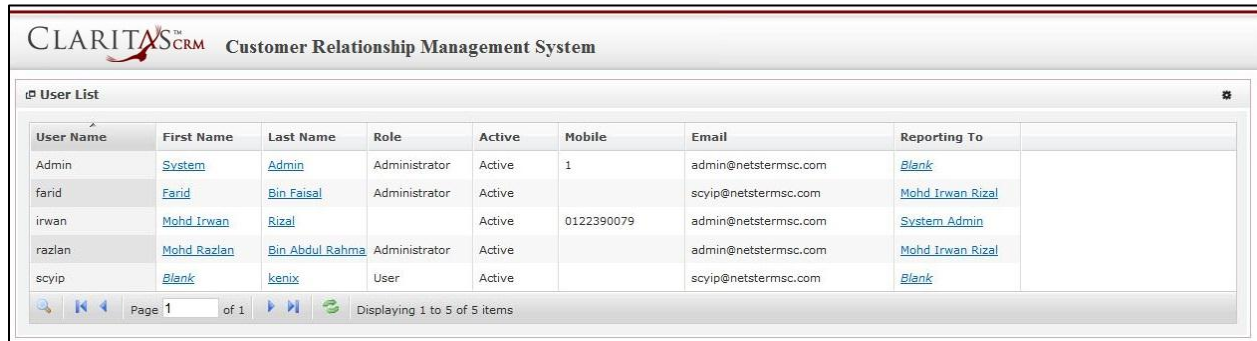
- Type in the First Name or Last Name of the User and wait for the **auto-complete** dropdown of the User, if the name entered does not match any of the available users; the textbox will be auto-cleared. (Click at the User name to select the user)

OR



Figure 17.30: Assigned To Field Auto Complete Dropdown

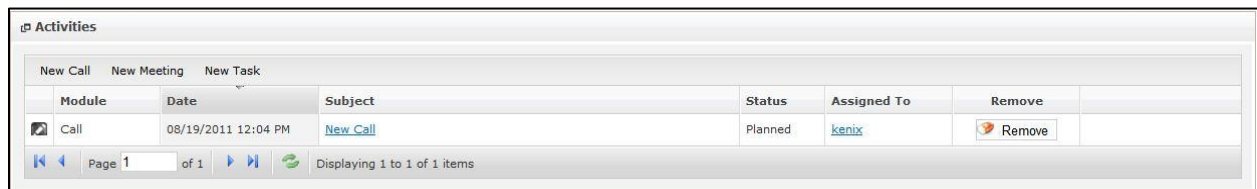
- ii. Click at the  button to open a new popup containing the list of all Users. (Click at the user's First Name or Last Name hyperlink to select the user)



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

Figure 17.31: Assigned To Popup

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







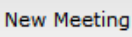
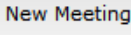


Module	Date	Subject	Status	Assigned To	Remove
 Call	08/19/2011 12:04 PM	<a href="#">New Call</a>	Planned	<a href="#">kenix</a>	 Remove

Figure 17.32: Activities Subpanel List New Call

To cancel creating New Call, click  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  button to confirm.

Clicking  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  menu at **Activities** subpanel. Once  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  button to create the New Meeting. Or click  menu to cancel creating New Meeting.

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

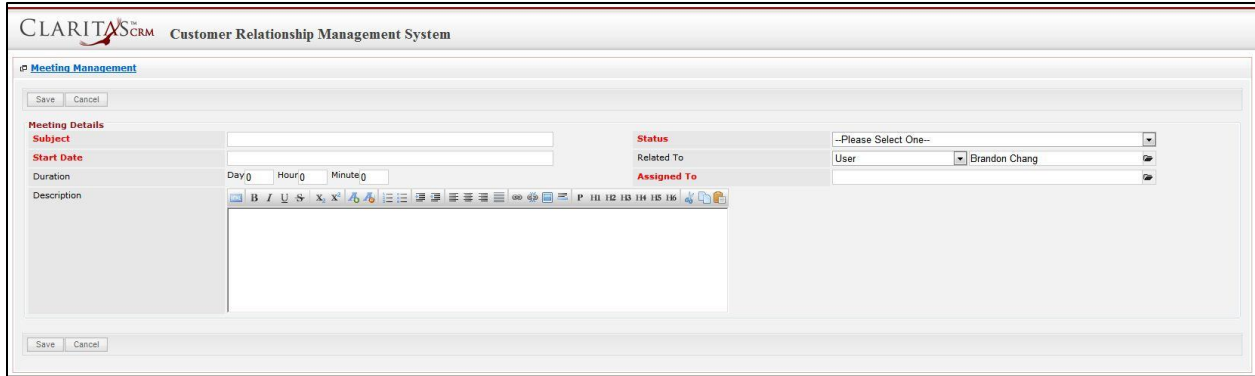


Figure 17.33: New Meeting Management Popup

- 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.

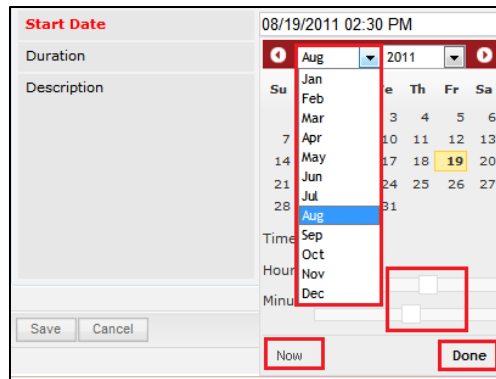


Figure 17.34: Start Date Time


- **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:

- 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	<a href="#">System</a>	<a href="#">Admin</a>	Administrator	Active	1	admin@netstermsc.com	<a href="#">Blank</a>
farid	<a href="#">Farid</a>	<a href="#">Bin Faisal</a>	Administrator	Active		scyip@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
irwan	<a href="#">Mohd Irwan</a>	<a href="#">Rizal</a>		Active	0122390079	admin@netstermsc.com	<a href="#">System Admin</a>
razlan	<a href="#">Mohd Razlan</a>	<a href="#">Bin Abdul Rahma</a>	Administrator	Active		admin@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
scyip	<a href="#">Blank</a>	<a href="#">kenix</a>	User	Active		scyip@netstermsc.com	<a href="#">Blank</a>

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	<a href="#">New Meeting</a>	Not Held	<a href="#">kenix</a>	Remove
Call	08/19/2011 12:04 PM	<a href="#">New Call</a>	Planned	<a href="#">kenix</a>	Remove

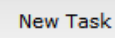
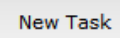


Figure 17.37: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click  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  button to **confirm**.

Clicking  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  menu at **Activities** subpanel. Once  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  button to create the New Task. Or click  menu to cancel creating New Task.

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



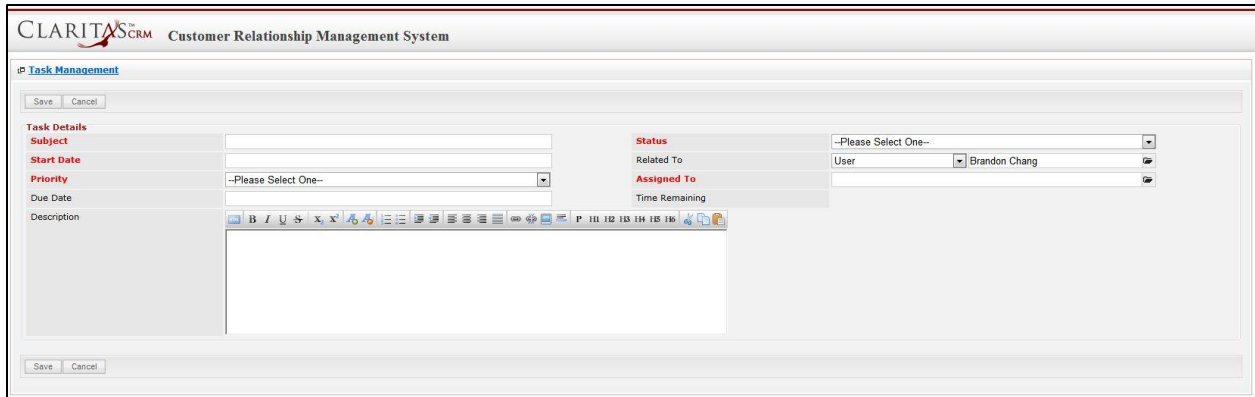


Figure 17.38: New Task Management Popup

- 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.

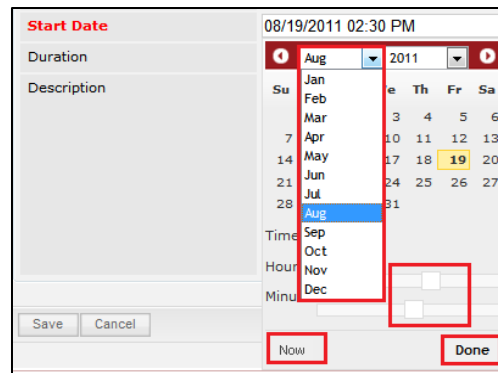


Figure 17.39: Start Date Time


- **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:
  - 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)

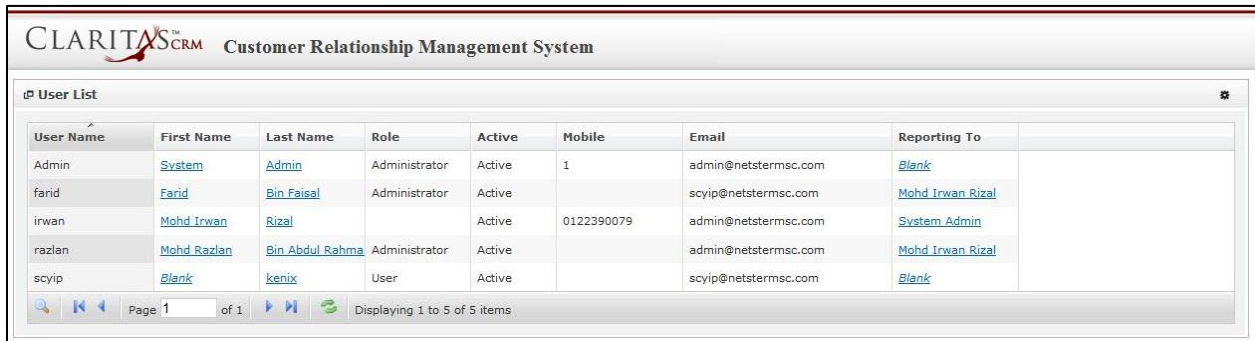


Figure 17.41: Assigned To Popup

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

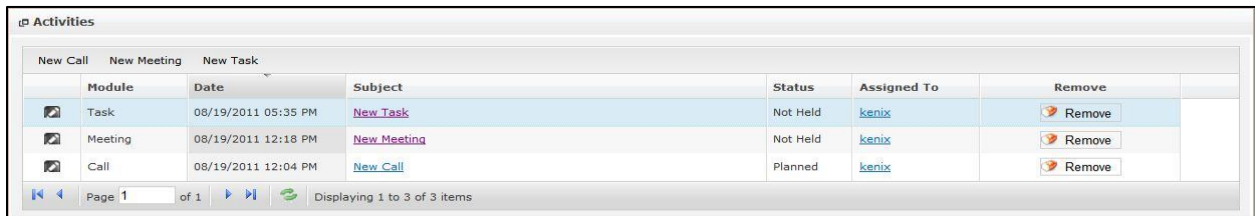





Figure 17.42: Activities Subpanel List New Task

To **cancel creating New Task**, click  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  button to **confirm**.

Clicking  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**.

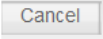

- **Related To** field will auto populate the name of the related **User**.
- **Attachment** field allow file extensions are as below (format that is not stated are not allowed to be uploaded):
  - **Documents:** .doc, .docx, .xls, .xlsx, .rtf, .txt, .pdf, .ppt, .pptx
  - **Pictures:** .jpg, .bmp, .png, .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.

Module	Date	Subject	Attachment	Remove
Note	08/19/2011 03:23 PM	<a href="#">New Note</a>		Remove

Figure 17.44: 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** 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  menu at **User List** subpanel.

Once  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  button to create the New User.

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

**User Maintenance**

Save Cancel

**User Profile**

**User Name**

Salutation

First Name

**Last Name**

**Allow Login**

**Active**

**Role**

Email

Website

**Password**

New Password

Confirm Password

**Business Information**

Job Title

Department

Organization

Reporting To

Employment Since

Employment Tenure

**Correspondence Address**

**Home**

Address 1

Address 2

Address 3

City

Postcode

State

Country

Home

Mobile

**Business**

Address 1

Address 2

Address 3

City

Postcode

State

Country

Business

Fax

**Other Information**

NRIC

Marital Status

Emergency Contact

Note

Gender

Date Of Birth

Age

Save Cancel

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**

**User Profile**

**User Name**

Salutation

First Name

**Last Name**

**Allow Login**

**Active**

**Role**

Email

Website

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.”

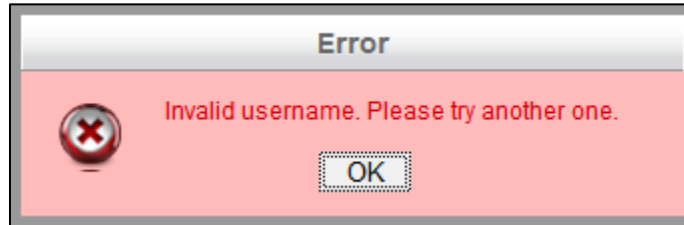


Figure 17.47: Create User - User Details

- **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.

A form section titled "Password" in red. It contains two input fields. The first is labeled "New Password" and the second is labeled "Confirm Password". Both fields have a white background and a grey border, and their contents are masked with black dots.

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.

A form section titled "Business Information" in red. It contains six input fields arranged in two columns. The first column has "Job Title" (Software Tester), "Department" (Quality Control), and "Organization" (a dropdown menu with "--Please Select One--"). The second column has "Reporting To" (kenix), "Employment Since" (12/01/2010), and "Employment Tenure" (0 Year(s) 8 Month(s)).

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)

The screenshot shows a form titled "Correspondence Address" with two main sections: "Home" and "Business". Each section contains fields for Address 1, Address 2, Address 3, City, Postcode, State, Country, Home (for Home section) or Business (for Business section), and Mobile (for Home section) or Fax (for Business section). The Home section is pre-filled with: Address 1: 246-248, Block A, Kelana Center Point; Address 2: No. 3, Jalan SS7/19; Address 3: (empty); City: Kelana Jaya; Postcode: 47301; State: Selangor; Country: Malaysia; Home: 0378054185; Mobile: 017-8054185. The Business section is pre-filled with: Address 1: 246-248, Block A, Kelana Center Point; Address 2: No. 3, Jalan SS7/19; Address 3: (empty); City: Kelana Jaya; Postcode: 47301; State: Selangor; Country: Malaysia; Business: 0378054186; Fax: 0378054184.

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.

The screenshot shows a form titled "Other Information" with fields for NRIC (801010145555), Marital Status (Single), Emergency Contact (03-78051222), Note (some note), Gender (Male), Date of Birth (10/10/1980), and Age (30 Years Old). The Note field has a rich text editor toolbar above it.

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**.

User List

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

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.

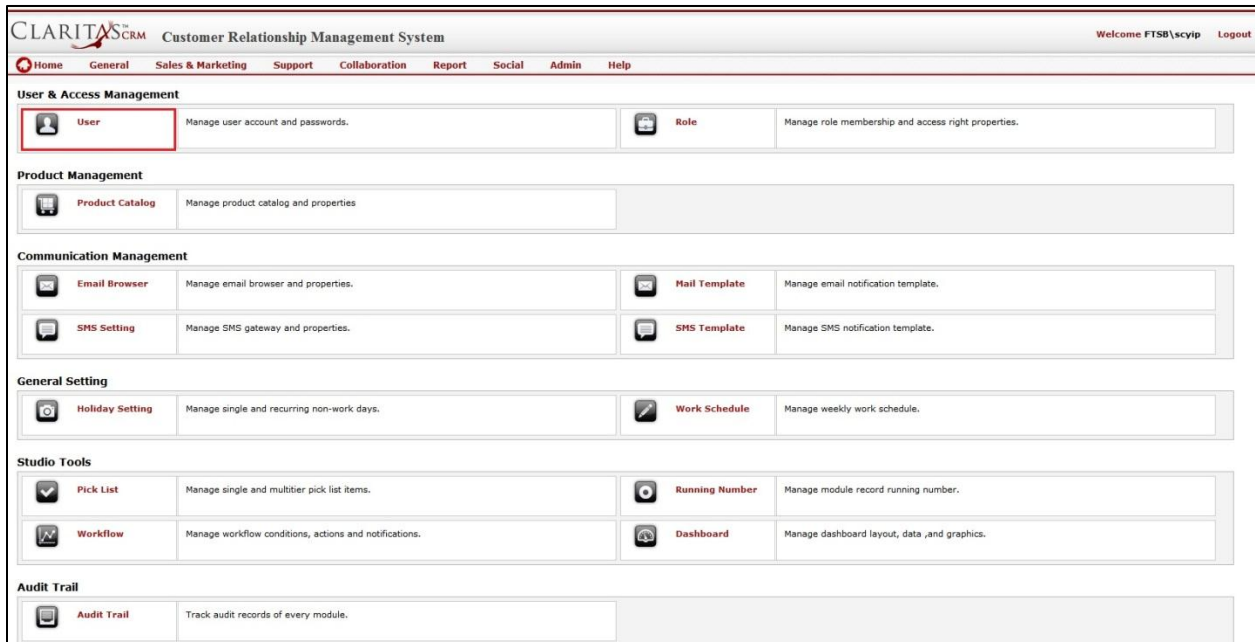


Figure 18.2: Role Menu in Admin Management Page

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

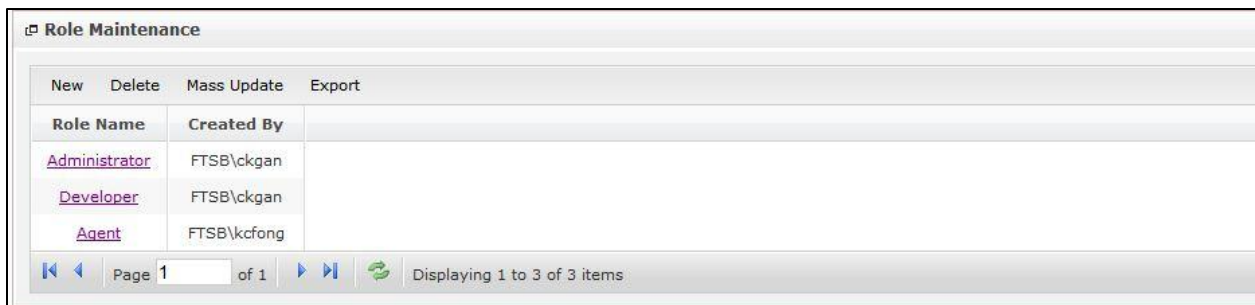


Figure 18.3: Role Listing

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

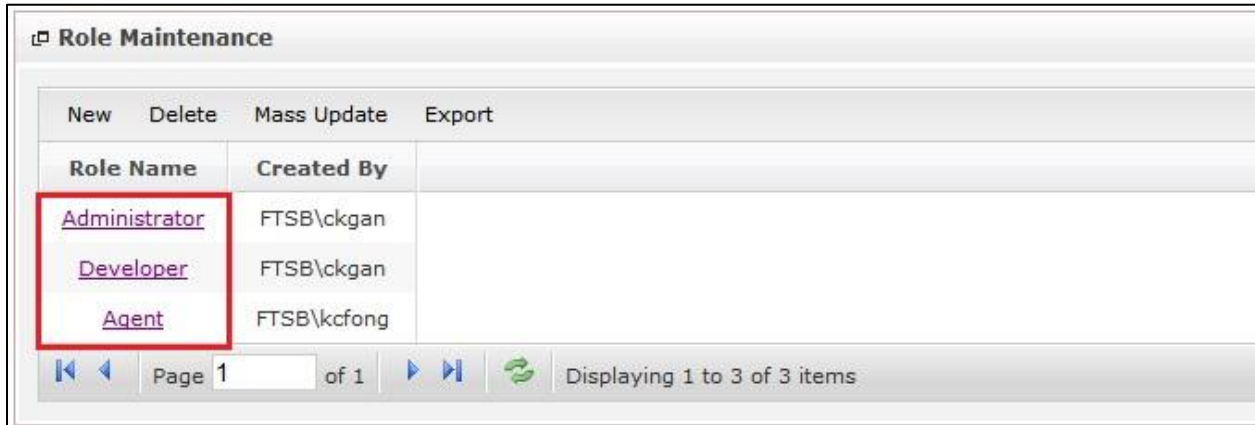


Figure 18.4: Role Name Hyperlink

After clicking the Role Name hyperlink, page will navigate to the **Role Maintenance Detail** page which displays all the details of the Role.

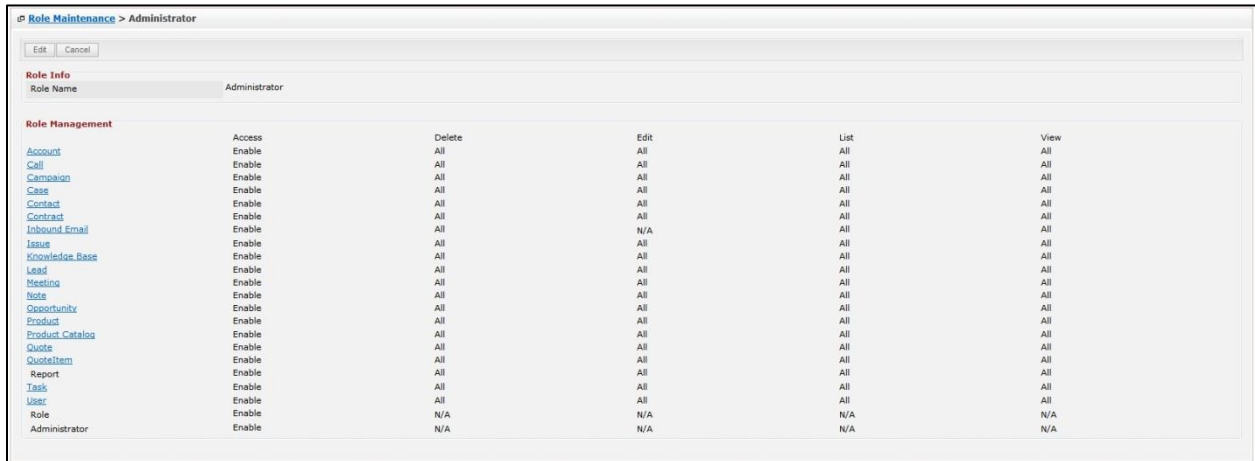


Figure 18.5: Role Maintenance Detail Page

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”](#)

Role Management	Access	Delete	Edit	List	View
Account	Disable	Disable	Disable	Disable	Disable
Call	Disable	Disable	Disable	Disable	Disable
Campaign	Disable	Disable	Disable	Disable	Disable
Case	Disable	Disable	Disable	Disable	Disable
Contact	Disable	Disable	Disable	Disable	Disable
Contract	Disable	Disable	Disable	Disable	Disable
Inbound Email	Disable	Disable	Disable	Disable	Disable
Issue	Disable	Disable	N/A	Disable	Disable
Knowledge Base	Disable	Disable	Disable	Disable	Disable
Lead	Disable	Disable	Disable	Disable	Disable
Meeting	Disable	Disable	Disable	Disable	Disable
Note	Disable	Disable	Disable	Disable	Disable
Opportunity	Disable	Disable	Disable	Disable	Disable
Product	Disable	Disable	Disable	Disable	Disable
Product Catalog	Disable	Disable	Disable	Disable	Disable
Quote	Disable	Disable	Disable	Disable	Disable
QuoteItem	Disable	Disable	Disable	Disable	Disable
Report	Disable	Disable	Disable	Disable	Disable
Task	Disable	Disable	Disable	Disable	Disable
User	Disable	Disable	Disable	Disable	Disable
Role	Disable	N/A	N/A	N/A	N/A
Administrator	Disable	N/A	N/A	N/A	N/A

Figure 18.7: Role Maintenance Create New Page

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

Role Maintenance

New 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.

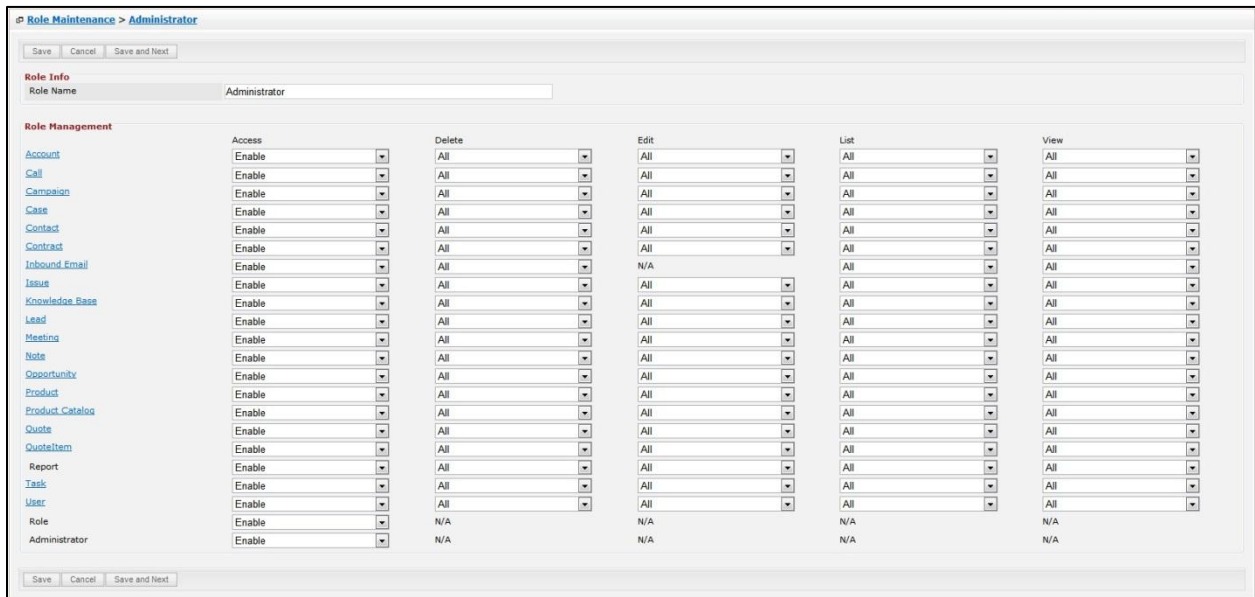
To go to the Previous Page of the listing, click at the **Previous Page**  button.

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  button in **Role Maintenance Detail** page. After clicking at the **Edit**  button page will navigate to the **Role Maintenance Edit** page.



Role Maintenance > Administrator

Save Cancel Save and Next

Role Info



Role Name Administrator

Role Management

	Access	Delete	Edit	List	View
Account	Enable	All	All	All	All
Call	Enable	All	All	All	All
Campaign	Enable	All	All	All	All
Case	Enable	All	All	All	All
Contact	Enable	All	All	All	All
Contract	Enable	All	All	All	All
Inbound Email	Enable	All	N/A	All	All
Issue	Enable	All	All	All	All
Knowledge Base	Enable	All	All	All	All
Lead	Enable	All	All	All	All
Meeting	Enable	All	All	All	All
Note	Enable	All	All	All	All
Opportunity	Enable	All	All	All	All
Product	Enable	All	All	All	All
Product Catalog	Enable	All	All	All	All
Quote	Enable	All	All	All	All
QuoteItem	Enable	All	All	All	All
Report	Enable	All	All	All	All
Task	Enable	All	All	All	All
User	Enable	All	All	All	All
Role	Enable	N/A	N/A	N/A	N/A
Administrator	Enable	N/A	N/A	N/A	N/A

Save Cancel Save and Next

**Figure 18.10: Role Maintenance Edit Page**

Edit the relevant access and click  button to save the changes and navigates back to **Role Maintenance Detail** page. Or click  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.

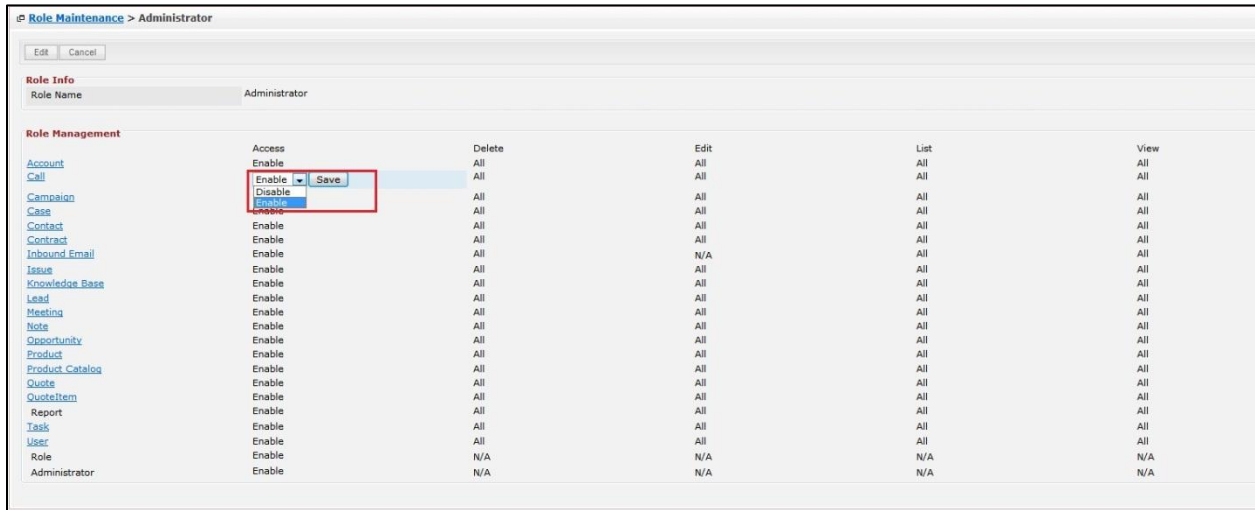

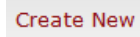
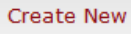




Figure 18.11: On-Click Edit Role

Edit the relevant access and click  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  menu at the top of the **Role Listing**. After clicking  menu, page will navigate to **Role Maintenance** page. Enter the name of the Role and select the relevant access and click  button to save the changes and navigates to **Role Maintenance Detail** page or click  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.

**Role Info**

Role Name

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  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 Role Name hyperlink in **Role Listing** page. Click the  button in **Role Maintenance Detail** page or double-click at the access fields and edit the fields in **Role Maintenance Detail** page. After clicking  button, page will navigate to **Role Maintenance Edit** page. Edit the relevant details and click  button to save the changes and navigates back to **User Maintenance Detail** page or click  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**.

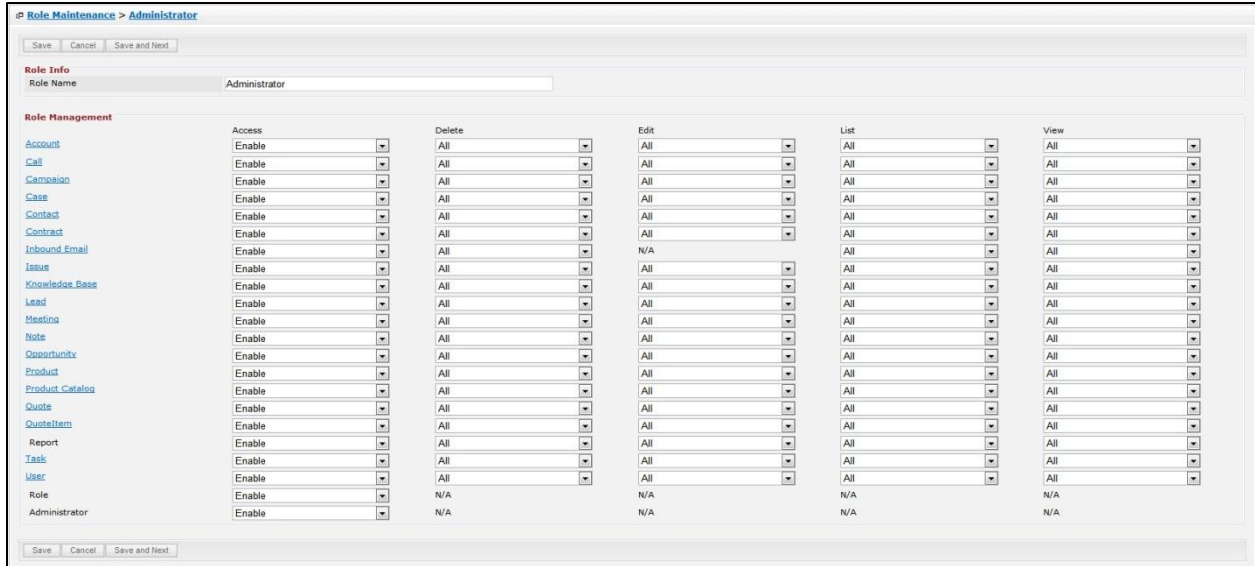


Figure 18.13: Role Maintenance Edit Page

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.

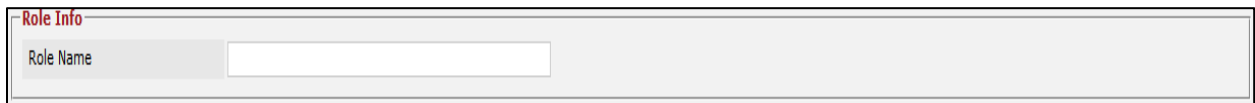


Figure 18.14: On-Click Edit Role

### 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.

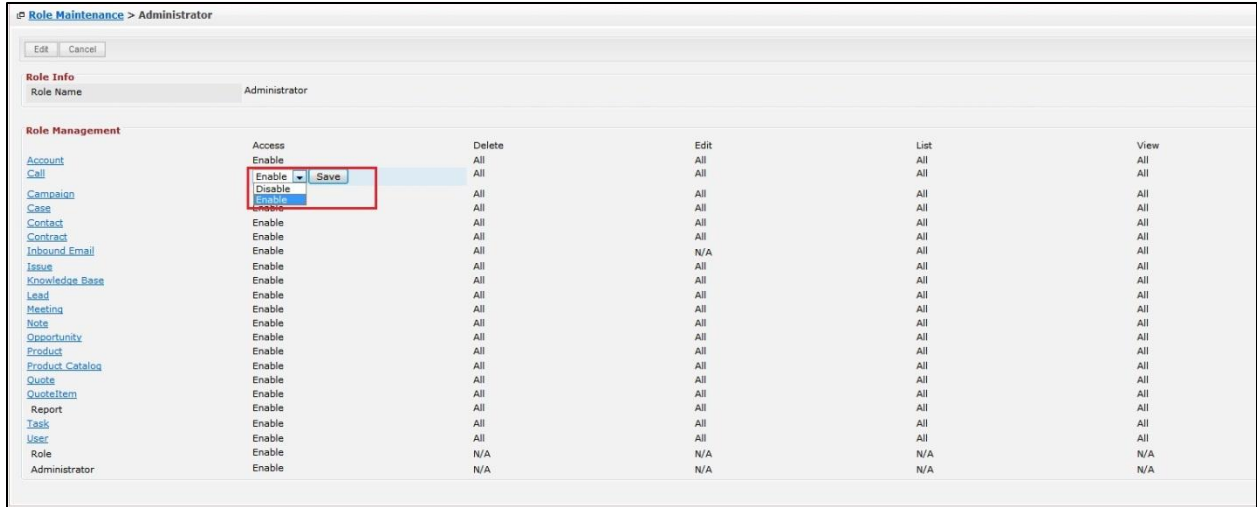



Figure 18.15: On-Click Edit Role

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.

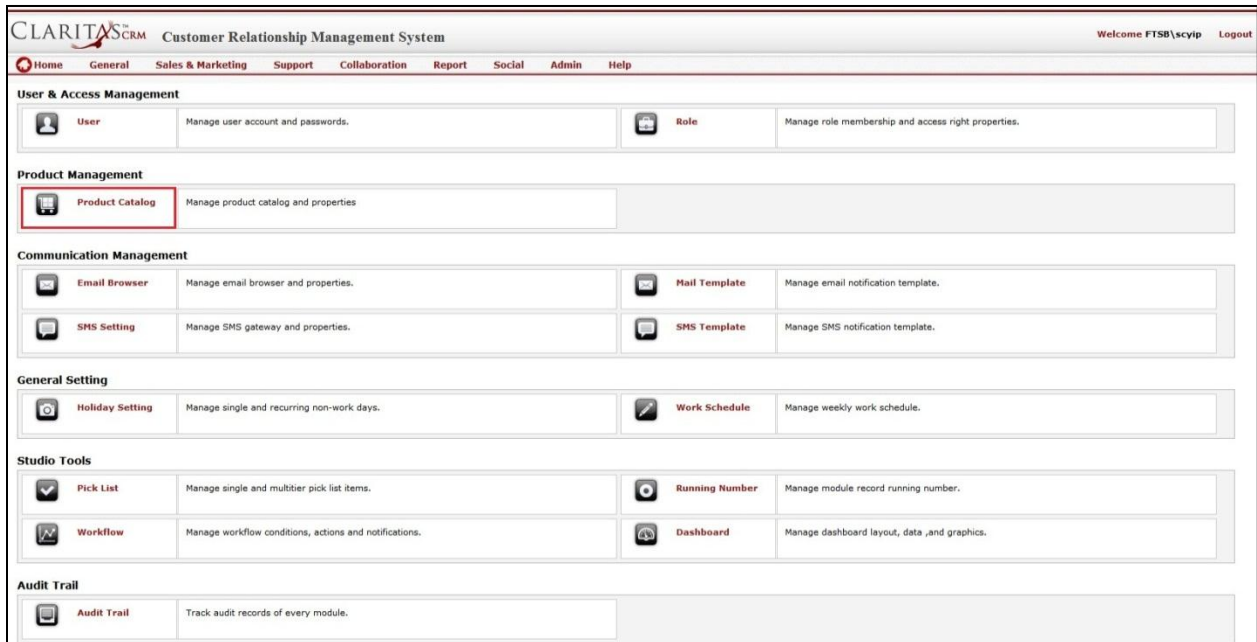


Figure 19.2: Product Catalog Menu in Admin Management Page

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**.

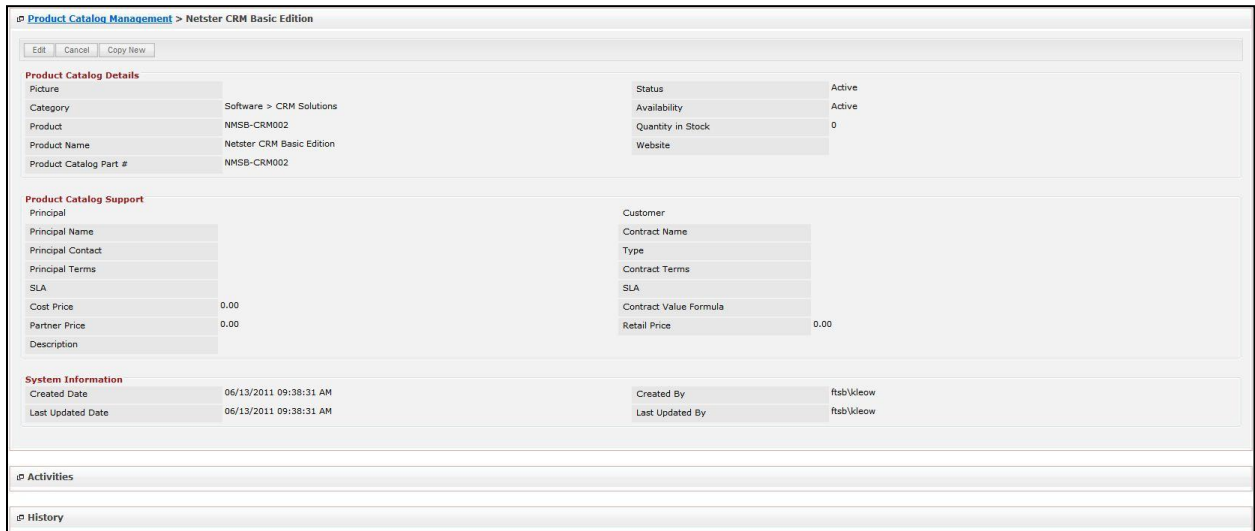


Figure 19.5: Product Catalog Management Detail Page

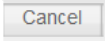
To copy the entire record and save as a new record, click **Copy New** button at **User Maintenance Detail** page.

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”](#)

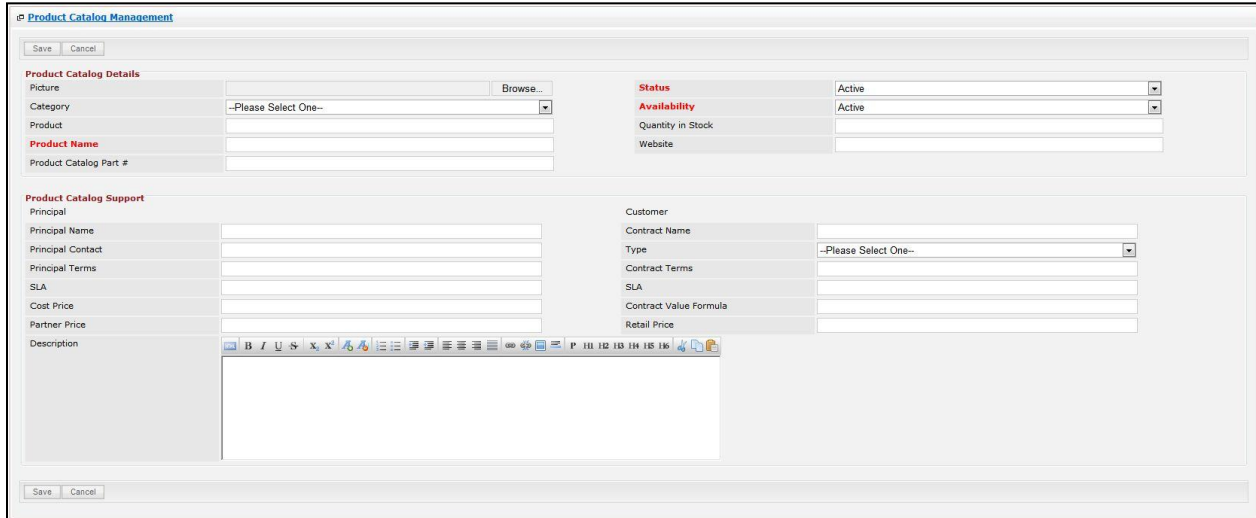


Figure 19.7: Product Catalog Management Create New Page

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

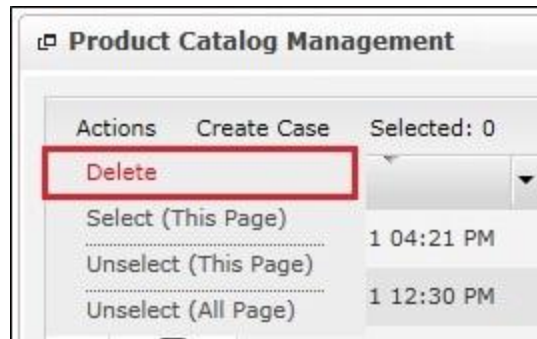


Figure 19.8: Action > Delete Menu

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 **Edit**  button in **Product Catalog Management Detail** page. After clicking at the **Edit**  button page will navigate to the **Product Catalog Management Edit** page.

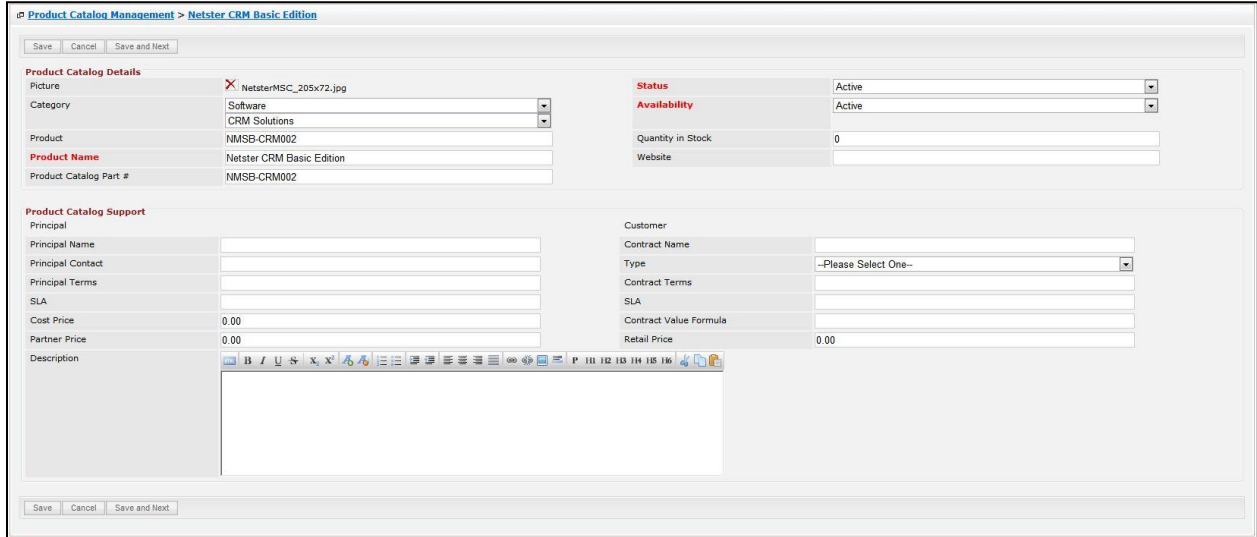

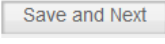



Figure 19.13: Product Catalog Management Edit Page

Edit the relevant details and click **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 of the next Product Catalog. Or click **Cancel**  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)

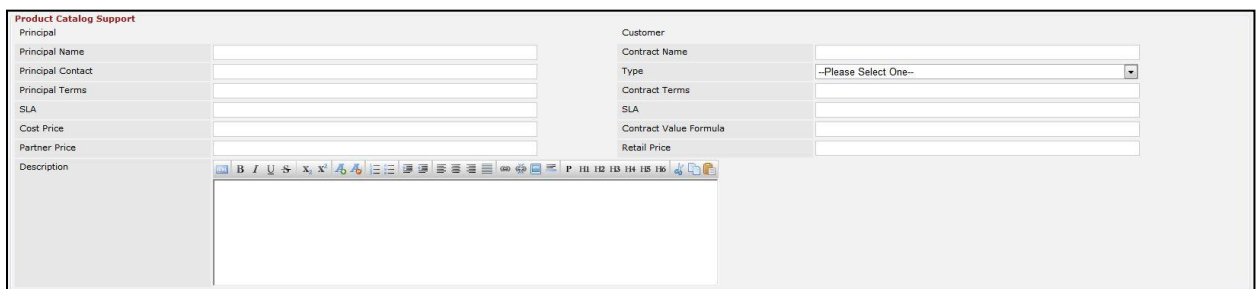





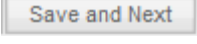


Figure 19.15: Create Product Catalog – Product Catalog Support

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**.

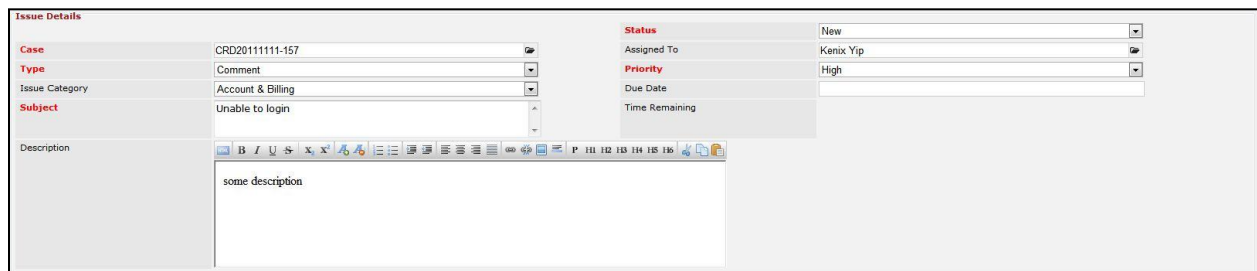


Figure 19.16: Edit Product Catalog - Product Catalog Details

- **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)

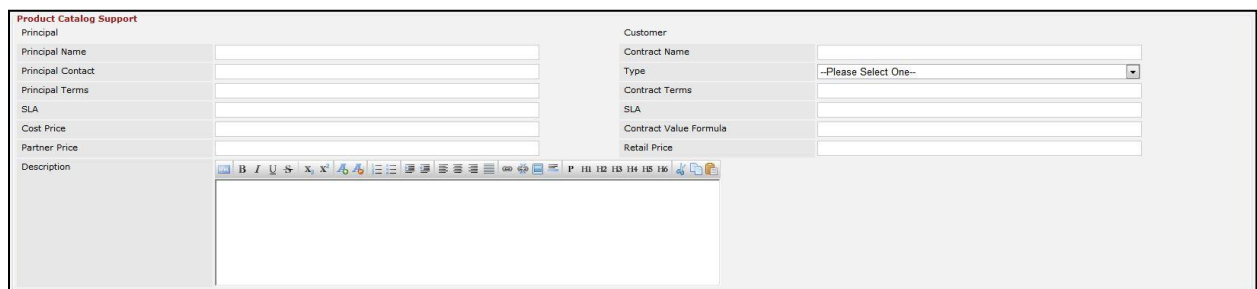


Figure 19.17: Create Product Catalog – Product Catalog Support

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.

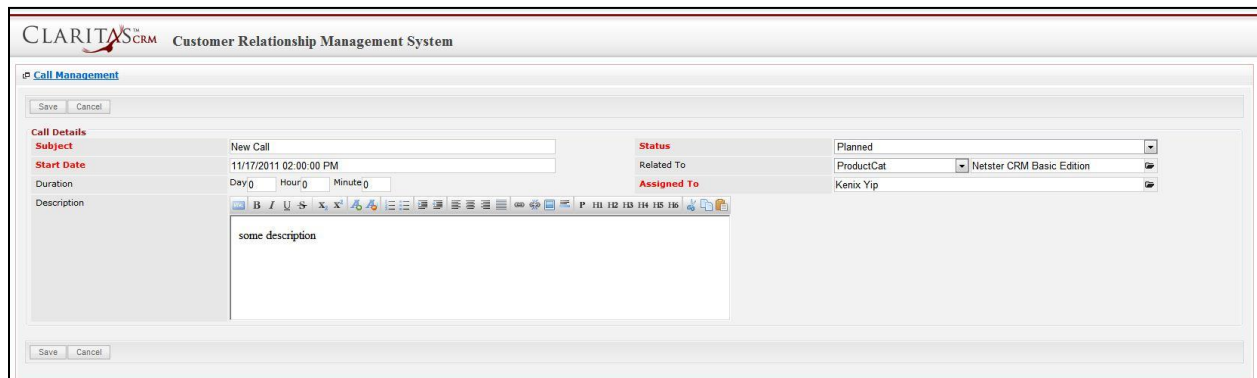
## Product Catalog – Activities Subpanel (New Call)

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.*



The screenshot shows the 'Call Management' window in the CLARITAS CRM system. The window title is 'CLARITAS CRM Customer Relationship Management System'. The main area is titled 'Call Management' and contains a 'Save' and 'Cancel' button at the top left. Below this, there are several fields for entering call details:

- Subject:** A text input field containing 'New Call'.
- Start Date:** A date and time input field showing '11/17/2011 02:00:00 PM'.
- Duration:** A field with sub-inputs for 'Day 0', 'Hour 0', and 'Minute 0'.
- Description:** A rich text editor area containing the text 'some description'.
- Status:** A dropdown menu set to 'Planned'.
- Related To:** A dropdown menu set to 'ProductCat'.
- Assigned To:** A dropdown menu set to 'Kenix Yip'.

At the bottom of the window, there are 'Save' and 'Cancel' buttons.

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.

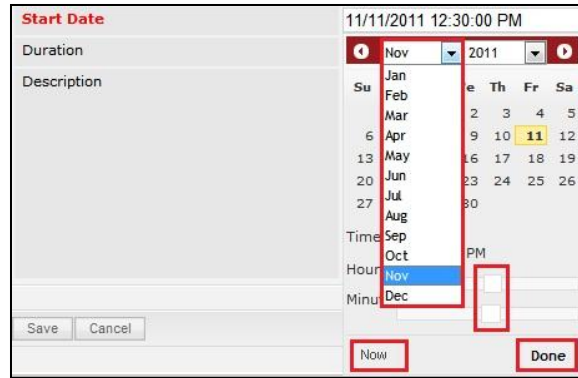


Figure 19.19: Start Date Time

- **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:

- 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

- 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)

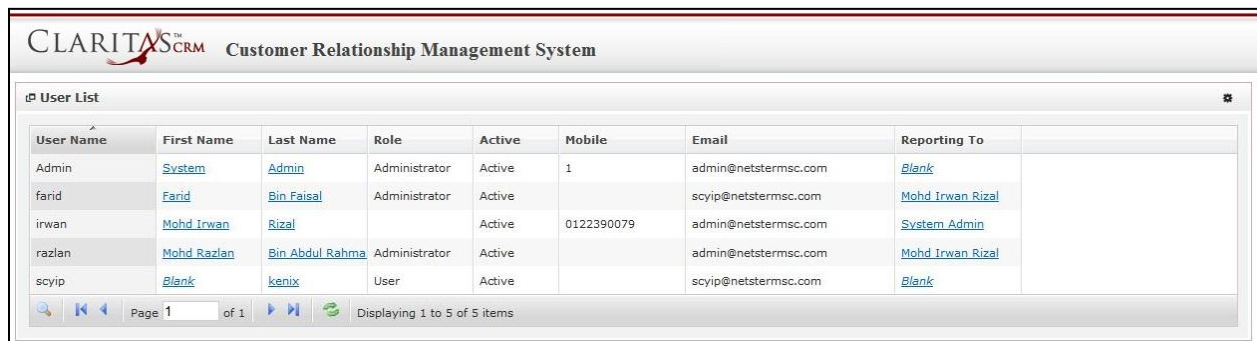


Figure 19.21: Assigned To Popup

- 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**

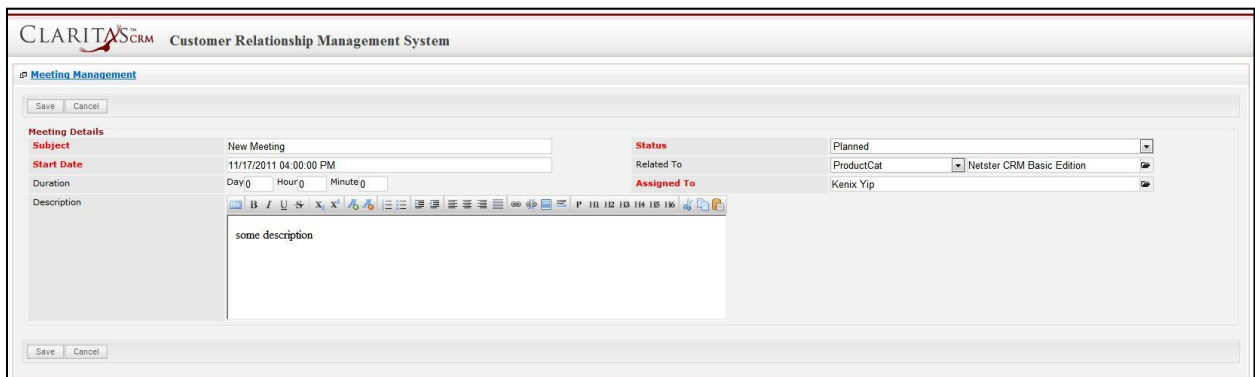
To **cancel creating New Call**, click  button. A confirmation dialog showing “Are you sure you want to close this window?” will prompt user to cancel creating New Call and close the window. Click  button to **confirm**.

Clicking  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  menu at **Activities** subpanel. Once  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  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  menu to set the **current time** when the Meeting is created. Click at the  menu to set the date and time.

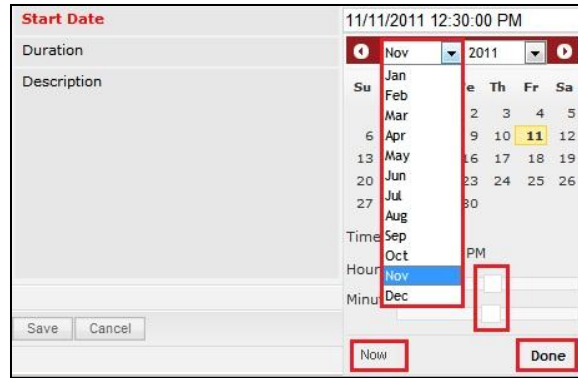



Figure 19.24: Start Date Time

- **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)

CLARITAS <sup>SM</sup> CRM Customer Relationship Management System							
User List							
User Name	First Name	Last Name	Role	Active	Mobile	Email	Reporting To
Admin	<a href="#">System</a>	<a href="#">Admin</a>	Administrator	Active	1	admin@netstermsc.com	<a href="#">Blank</a>
farid	<a href="#">Farid</a>	<a href="#">Bin Faisal</a>	Administrator	Active		scyip@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
irwan	<a href="#">Mohd Irwan</a>	<a href="#">Rizal</a>		Active	0122390079	admin@netstermsc.com	<a href="#">System Admin</a>
razlan	<a href="#">Mohd Razlan</a>	<a href="#">Bin Abdul Rahma</a>	Administrator	Active		admin@netstermsc.com	<a href="#">Mohd Irwan Rizal</a>
scyip	<a href="#">Blank</a>	<a href="#">kenix</a>	User	Active		scyip@netstermsc.com	<a href="#">Blank</a>

Page 1 of 1    Displaying 1 to 5 of 5 items

Figure 19.26: 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	<a href="#">New Meeting</a>	Not Held	<a href="#">kenix</a>	Remove
Call	08/19/2011 12:04 PM	<a href="#">New Call</a>	Planned	<a href="#">kenix</a>	Remove

Figure 19.27: Activities Subpanel List New Meeting

To **cancel creating New Meeting**, click 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 button to **confirm**.

Clicking 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 menu at **Activities** subpanel.

Once menu is clicked, a Task Management window will pop up for user to create a New Task.

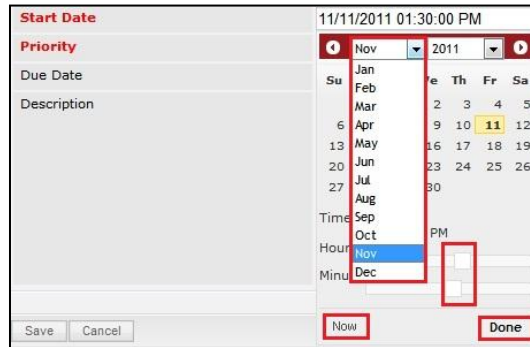
Enter the details of the Task and click button to create the New Task. Or click menu to cancel creating New Task.

*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)

CLARITAS<sup>SM</sup> CRM Customer Relationship Management System

User List

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

Page 1 of 1 Displaying 1 to 5 of 5 items

Figure 19.31: 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	<a href="#">New Task</a>	Not Held	<a href="#">kenix</a>	Remove
	Meeting	08/19/2011 12:18 PM	<a href="#">New Meeting</a>	Not Held	<a href="#">kenix</a>	Remove
	Call	08/19/2011 12:04 PM	<a href="#">New Call</a>	Planned	<a href="#">kenix</a>	Remove

Page 1 of 1 Displaying 1 to 3 of 3 items

Figure 19.32: Activities Subpanel List New Task

To **cancel creating New Task**, click  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  button to **confirm**.

Clicking  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.*

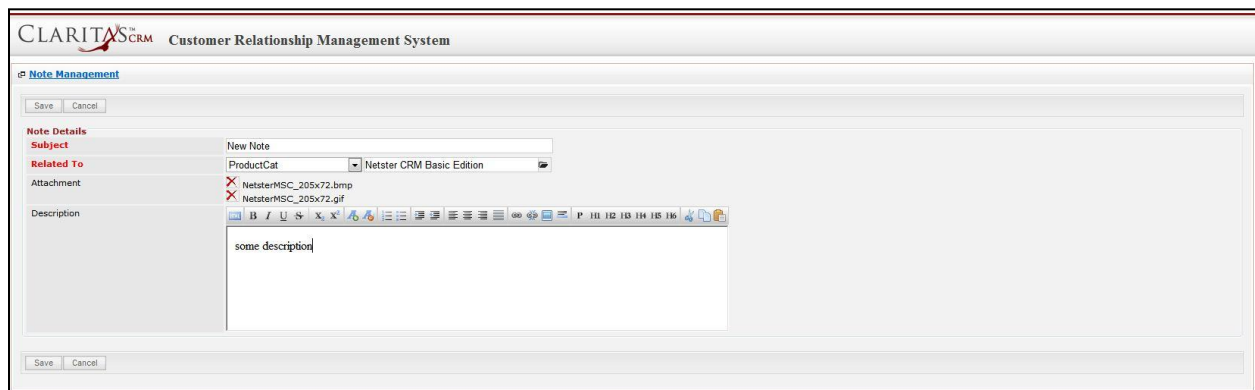


Figure 19.33: New Note Management Popup

- 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.

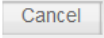




Module	Date	Subject	Attachment	Remove
Note	08/19/2011 03:23 PM	<a href="#">New Note</a>		<a href="#">Remove</a>

Figure 19.34: 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.

## 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.

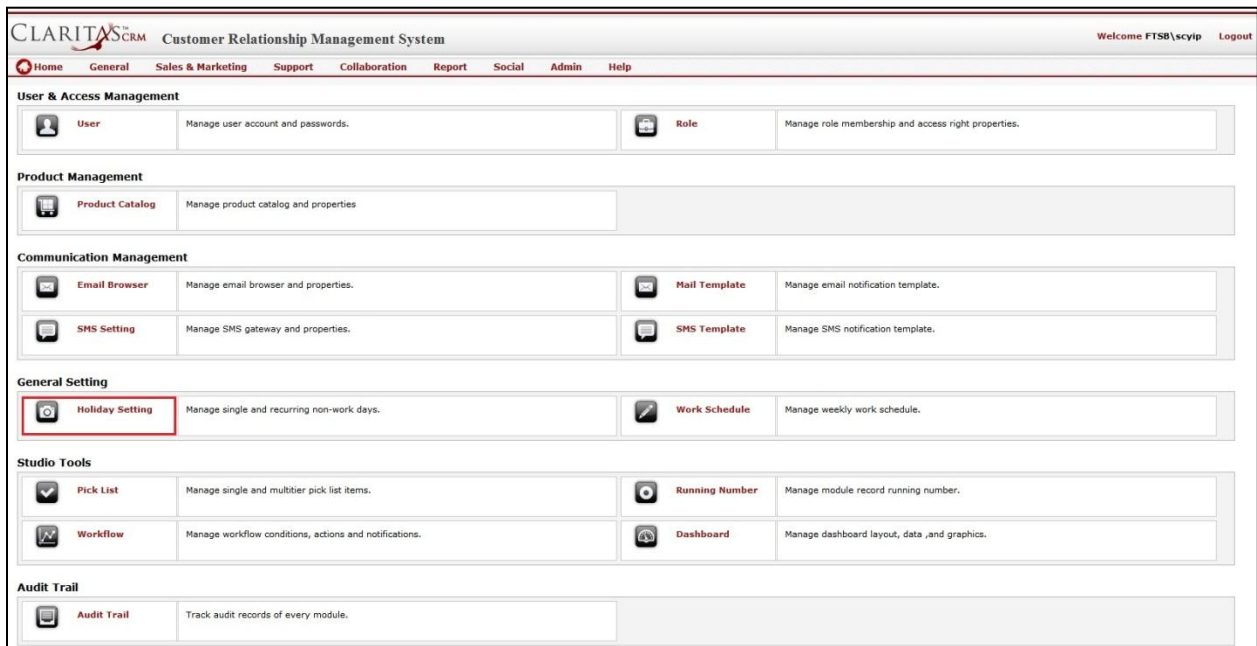


Figure 20.2: Holiday Setting Menu in Admin Management Page

Page will load the list of the Holiday Setting available and Add Holiday Detail form in the system.

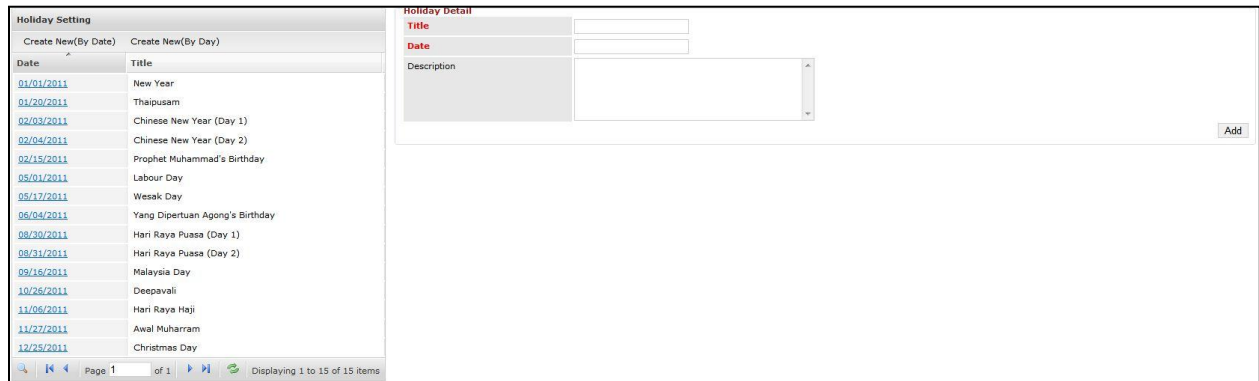


Figure 20.3: Holiday Setting Listing and Add Holiday Detail Form

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.

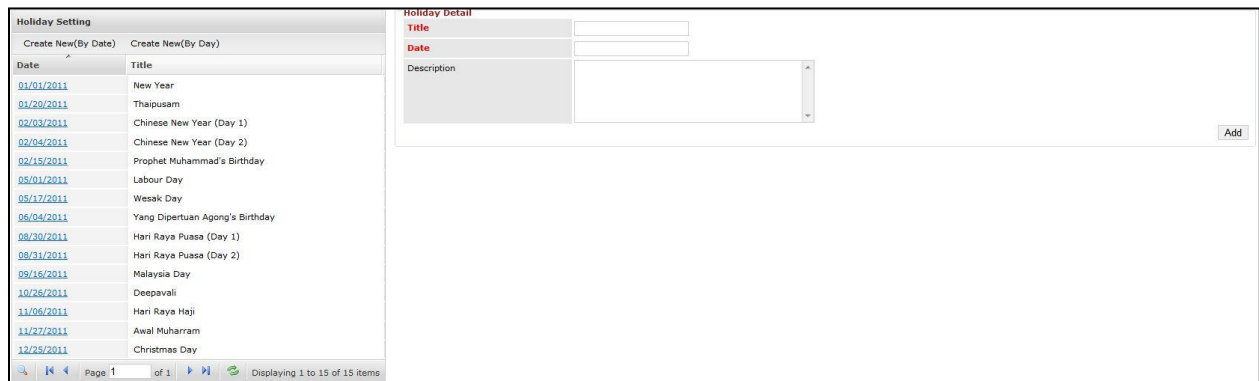


Figure 20.4: Date Hyperlink

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.

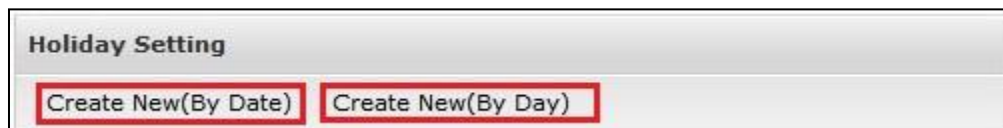


Figure 20.5: Create New Holiday Setting Menu

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](#)"

Holiday Detail	
<b>Title</b>	Malaysia Day
<b>Date</b>	09/16/2011
Description	Malaysia Day public holiday
<input type="button" value="Add"/>	

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  button.

Holiday Setting		Holiday Detail	
Create New		<b>Title</b>	Raya
Date	Title	<b>Date</b>	08/31/2011
<a href="#">08/31/2011</a>	Raya	Description	Har Raya Holiday
<a href="#">09/16/2011</a>	Malaysia Day		
Page 1 of 1		<input type="button" value="Update"/> <input type="button" value="Delete"/>	

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.

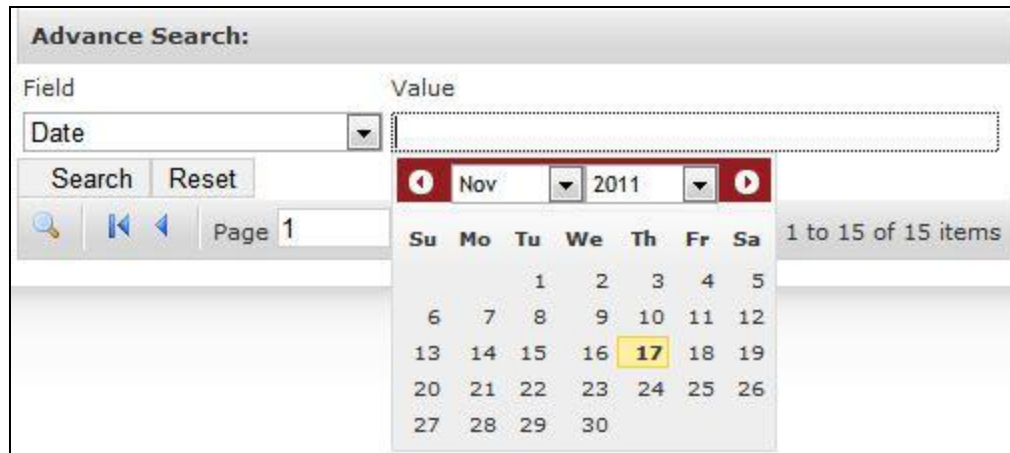
To go to the Previous Page of the listing, click at the **Previous Page**  button.

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.



The screenshot shows the 'Advance Search' section. It includes a 'Field' dropdown menu with 'Date' selected, a 'Value' input field, and 'Search' and 'Reset' buttons. Below this is a calendar for November 2011, with the date '17' highlighted in yellow. To the right of the calendar, it says '1 to 15 of 15 items'.

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.



The screenshot shows the 'Holiday Setting' listing table with two rows: '08/31/2011' (Raya) and '09/16/2011' (Malaysia Day). The '08/31/2011' date is highlighted in red. To the right is the 'Holiday Detail' form with fields for Title (Raya), Date (08/31/2011), and Description (Hari Raya Holiday). The 'Update' button is highlighted in red.

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

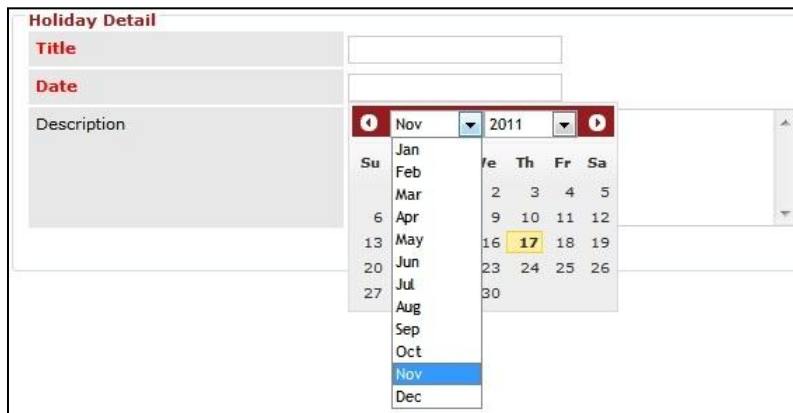
- Compulsory fields: **Title** and **Date**.



The screenshot shows a form titled "Holiday Detail". It contains three main input areas: "Title" (a text box), "Date" (a date picker), and "Description" (a text area). The "Title" and "Date" labels are highlighted in red. An "Add" button is located at the bottom right of the form.

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.



The screenshot shows the "Holiday Detail" form with a calendar overlay on the "Date" field. The calendar displays the month of November 2011. The date 17 is highlighted in yellow. The "Date" label is highlighted in red.

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	
<a href="#">Create New(By Date)</a>	<a href="#">Create New(By Day)</a>
Date	Title
<a href="#">01/02/2012</a>	First Saturday
<a href="#">02/06/2012</a>	First Saturday
<a href="#">03/05/2012</a>	First Saturday
<a href="#">04/02/2012</a>	First Saturday
<a href="#">05/07/2012</a>	First Saturday
<a href="#">06/04/2012</a>	First Saturday
<a href="#">07/02/2012</a>	First Saturday
<a href="#">08/06/2012</a>	First Saturday
<a href="#">09/03/2012</a>	First Saturday
<a href="#">10/01/2012</a>	First Saturday
<a href="#">11/05/2012</a>	First Saturday
<a href="#">12/03/2012</a>	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

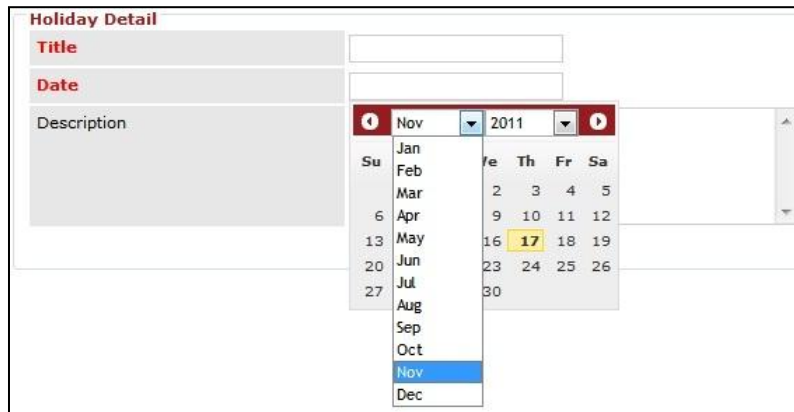
button.

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.



The screenshot shows a form titled "Holiday Detail" with three fields: "Title", "Date", and "Description". The "Title" and "Date" fields are highlighted in red. The "Date" field is active, showing a calendar for the month of November 2011. The date 17 is selected and highlighted in yellow. The "Description" field is empty.

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.

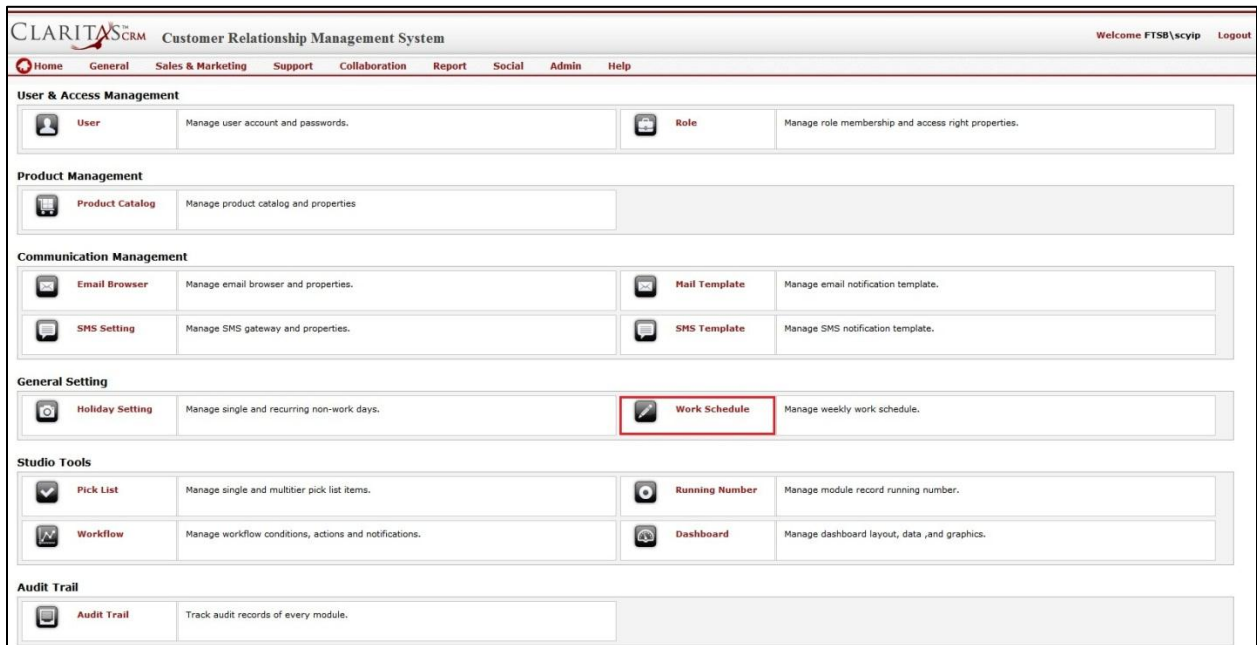


Figure 21.2: Work Schedule Menu in Admin Management Page

Page will load the Work Schedule as set in the system.

The screenshot shows a 'Working Detail' configuration form. At the top left is a 'Save' button. Below it, the 'Working Days' section has checkboxes for Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. The 'Working Hour Start' is set to 09:00AM and 'Working Hour End' is 06:00PM. 'Lunch Time Start' is 12:00PM and 'Lunch Time End' is 01:00PM. Below the form is a grid with columns for Monday through Sunday and rows for time slots from 9:00AM to 6:00PM. The grid shows working hours for Monday-Friday and non-working days for Saturday and Sunday. A legend at the bottom indicates 'Working Hours' (yellow), 'Lunch Time' (light blue), and 'Non Work Day' (grey).

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
9:00AM	Working Hours	Working Hours	Working Hours	Working Hours	Working Hours	Non Work Day	Non Work Day
10:00AM	Working Hours	Working Hours	Working Hours	Working Hours	Working Hours	Non Work Day	Non Work Day
11:00AM	Working Hours	Working Hours	Working Hours	Working Hours	Working Hours	Non Work Day	Non Work Day
12:00PM	Lunch Time	Lunch Time	Lunch Time	Lunch Time	Lunch Time	Non Work Day	Non Work Day
1:00PM	Working Hours	Working Hours	Working Hours	Working Hours	Working Hours	Non Work Day	Non Work Day
2:00PM	Working Hours	Working Hours	Working Hours	Working Hours	Working Hours	Non Work Day	Non Work Day
3:00PM	Working Hours	Working Hours	Working Hours	Working Hours	Working Hours	Non Work Day	Non Work Day
4:00PM	Working Hours	Working Hours	Working Hours	Working Hours	Working Hours	Non Work Day	Non Work Day
5:00PM	Working Hours	Working Hours	Working Hours	Working Hours	Working Hours	Non Work Day	Non Work Day
6:00PM	Working Hours	Working Hours	Working Hours	Working Hours	Working Hours	Non Work Day	Non Work Day

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  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.

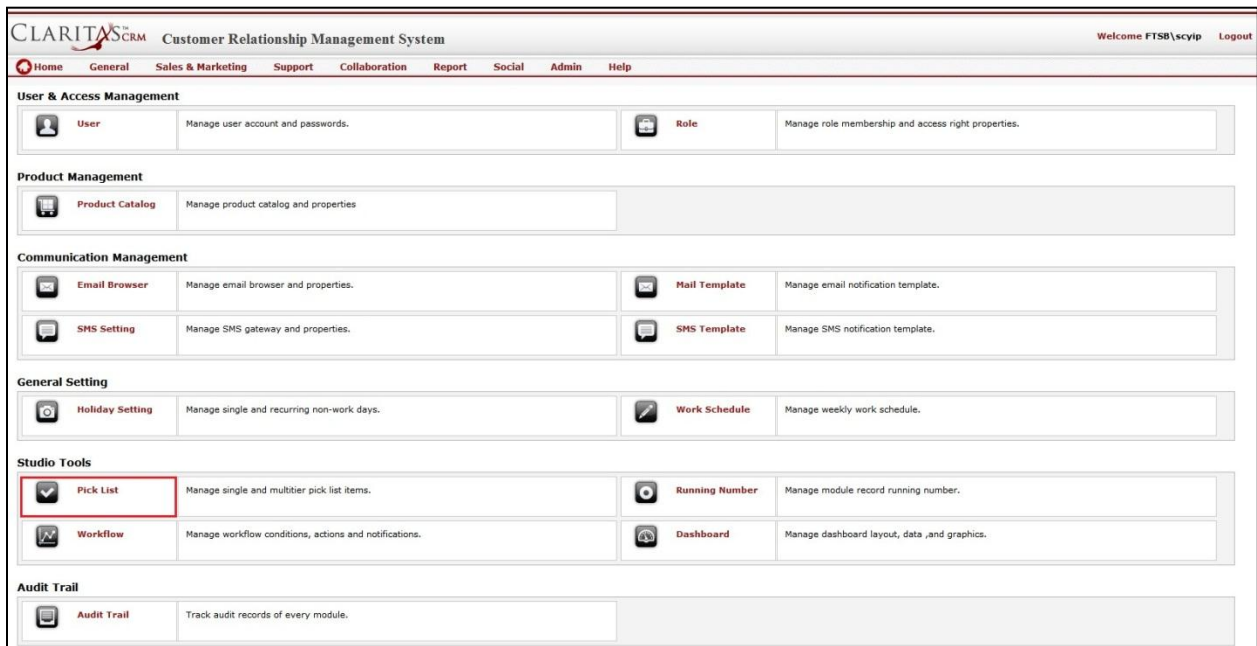


Figure 22.2: Pick List Menu in Admin Management Page

Page will load the Pick Listing and Pick List Detail Page.

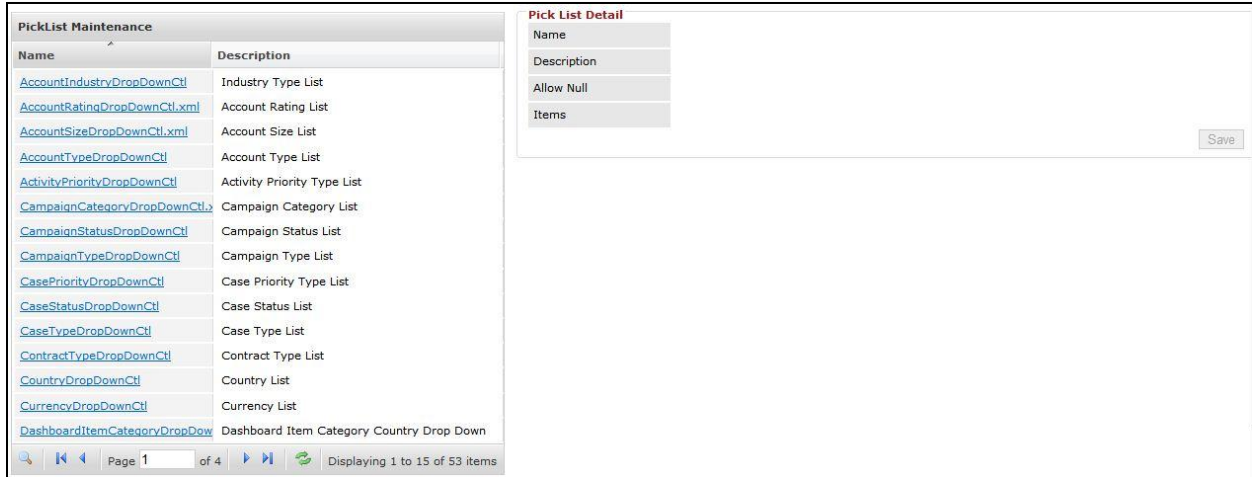


Figure 22.3: Pick List Page

Click at the Pick List Name hyperlink to view the detail of the Pick List in Pick List Detail section.

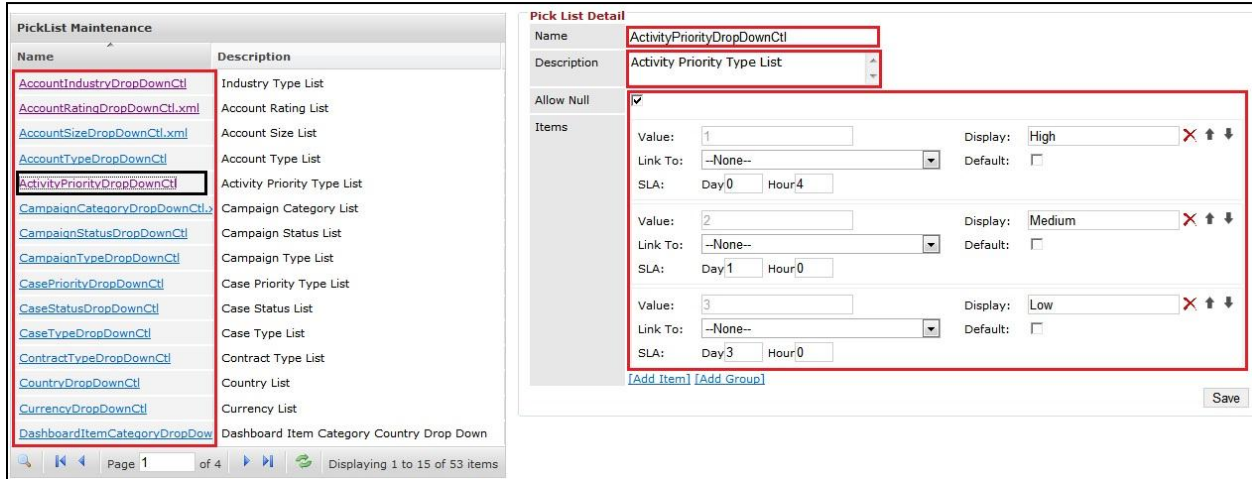


Figure 22.4: Pick List Detail

**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	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Checked value as default
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	--Please select one-- as default
3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Checked value as default
4	<input type="checkbox"/>	<input type="checkbox"/>	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  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  button to save the changes.

- **Value** field will be the Value stored in database. This value must be unique and cannot be edited once  button is clicked. It is advisable to enter a meaningful and without space Value for the field.

Value: 1.1.SS01      Display: Galaxy Tablet 14.1

Link To: --None--      Default:

[Add Item] [Add Group]      Save



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  button to save the changes. **Value** field is **not editable**.

Value: 1.2.Len03      Display: ThinkPad X-Series

Link To: --None--      Default:

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.

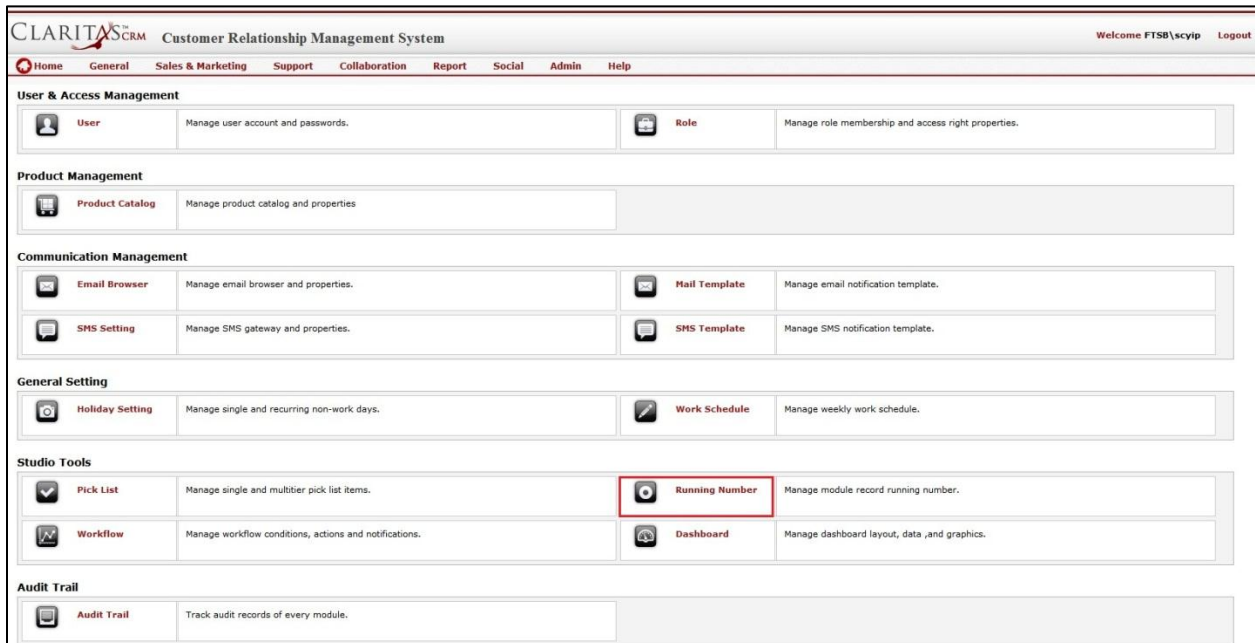


Figure 23.2: Running Number Menu in Admin Management Page

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.

Running Number Maintenance	
Field Name	Module
<a href="#">Quotation</a>	Quote
<a href="#">Purchase</a>	Product
<a href="#">Issue</a>	Issue
<a href="#">Contract</a>	Contract
<a href="#">Case</a>	Case

Page 1 of 1 | Displaying 1 to 5 of 5 items

Running Number Detail	
Module	Quote
Name	QuoteRef
Next Running Number	11
Format	QT{DT:yyyyMMdd}-{2%r1}
Example:	{6%r1} -- 000002 {3%r1} -- 003
Date:	{DT:yyyyMMdd}
Example:	{DT:yyyyMMdd} -- 20110529 {DT:MMMM} -- January

Save

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:

## at System

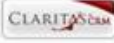

ation
Report
Social
Admin
Help

**Running Number Detail**

Module	Quote
Name	QuoteRef
Next Running Number	<input type="text" value="11"/>
Format	<input type="text" value="QT{DT:yyyyMMdd}-{2%r1}"/> <div style="margin-top: 5px;"> <p><b>Example:</b>  {6%r1} -- 000002  {3%r1} -- 003</p> <p><b>Date:</b> {DT:yyyyMMdd}  <b>Example:</b>  {DT:yyyyMMdd} -- 20110529  {DT:MMMM} -- January</p> </div>

Date Format	Example
YYYY	2011
YY	11
MMMM	January
MMM	Jan
MM	01
M	1
DDDD	Tuesday
DDD	Tue
DD	03
D	3
HH	13(24hour)
hh	01(12hour)
H	09(24hour)
h	9(12hour)
mm	09
m	9
ss	05
s	5

Powered By

Copyright © Netster MSC Sdn Bhd. All rights reserved.

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.

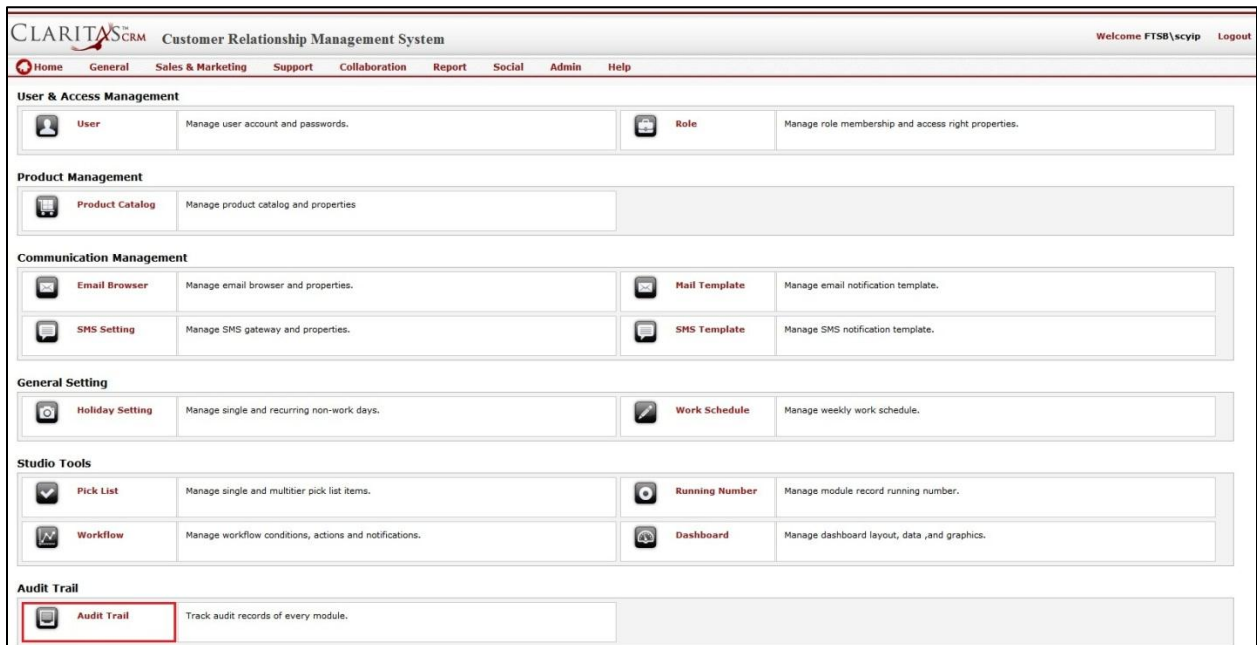


Figure 24.2: Audit Trail Menu in Admin Management Page

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	End	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-a0f5-4		asd		Test 1									
Update	0214268c-d37f-4	Gan	Chin Kiat	ckgan@netsterm			Mr		IT		Yew Lun Woo	123		+6016934337
Update	234dfb51-302b-4	Farid	Faisal	farid@netsterm							Yew Lun Woo			+6015449876
Update	353afb99-a034-4	SC	Yip	scyip@netsterm		http://www.netst	Ms				Kenix Yip			0199883553
Update	ac04eeee-15cd-4	FTSB	Farid	farid@netsterm			Mr				Kelvin Leow			+6018337228
Update	0214268c-d37f-4	Gan	Chin Kiat	ckgan@netsterm			Mr		IT		Yew Lun Woo	123		+6016934337
Update	aae68060-9b8d-4	Brandon	Chang	bochang@netster			Mr		Senior Consultar	Sales & Marketin				+6012779636
Update	ac04eeee-15cd-4	FTSB	Farid	farid@netsterm			Mr							
Update	0214268c-d37f-4	Gan	Chin Kiat	ckgan@netsterm			Mr		IT		Yew Lun Woo	123		+6016934276
Update	34996057-2880-	Kenix	Yip	scyip@netsterm			Ms		Support Speciali	Information Tech	Kelvin Leow	000000000	000000000	0169342765
Update	7b2aa4cb-92e9-9	Kha Chun	Fong	kcfong@netstem					Software Develo	Information Tech				1
Update	34996057-2880-	Kenix	Yip	scyip@netsterm			Ms		Support Speciali	Information Tech	Kelvin Leow	000000000	000000000	0187769988

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.