OFFICECENTRAL

USER MANUAL – ENGLISH

CRM MODULE

CONTENTS

PREFACE

OfficeCentral is a system which uses the internet cloud-based software covering important modules to manage a company which includes HRMS, Payroll, Accounting, Customer Relationship Management (CRM) , Procurement, Point-of-Sale (POS) and Distribution.

OfficeCentral is a web application specially designed for small and medium industry companies to help them manage their company easily and smoothly.

Online help

We have prepared online help to assist you in learning to use OfficeCentral online. A special website for support purposes as follow:

eLearning: http://academy.ICTForGrowth.com
Help Center:
http://bantuan.OfficeCentralCloud.com (Malay)
http://help.OfficeCentralCloud.com (English)

Contact us

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CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

INTRODUCTION

OfficeCentral also contains a module on management of customer relationship or known as Customer Relationship Management (CRM). In this module, you can also manage information and data related to your customers and to monitor relationship between your company and customers.

ACCESS

To access this module, you need to click on the main menu ***"Customer Relationship Management".***

USAGE

First and foremost, you need to prepare the right configuration to allow you to use the system effectively and suitable with your company policy.

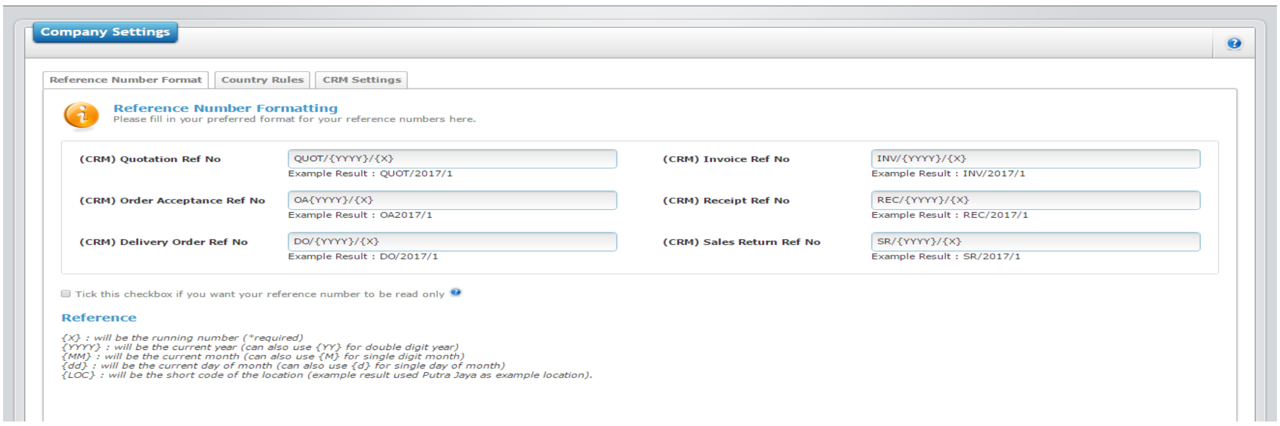
1.0 CONFIGURATION

For the beginning of this module, you need to look at the configuration first in order to fix the setting for your CRM.

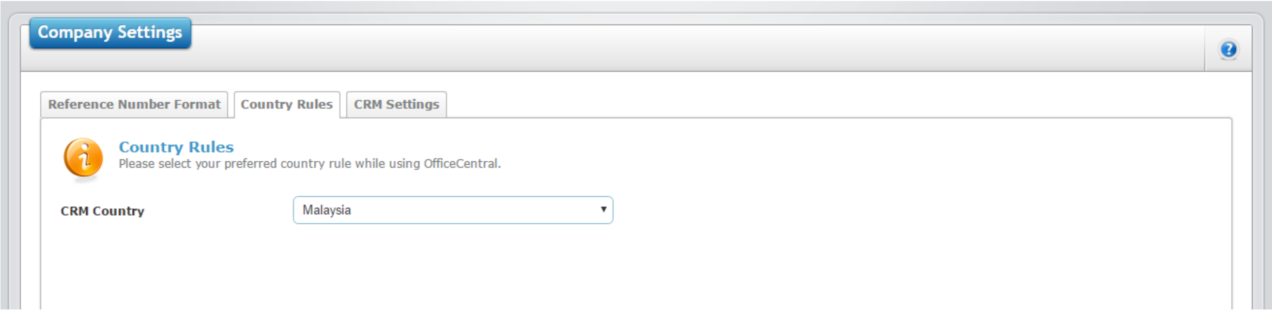
1.0.1 Settings

You can view the settings in configuration as the picture below:

When you click on the settings button, you have entered the page for CRM settings. Below is the display for CRM settings.

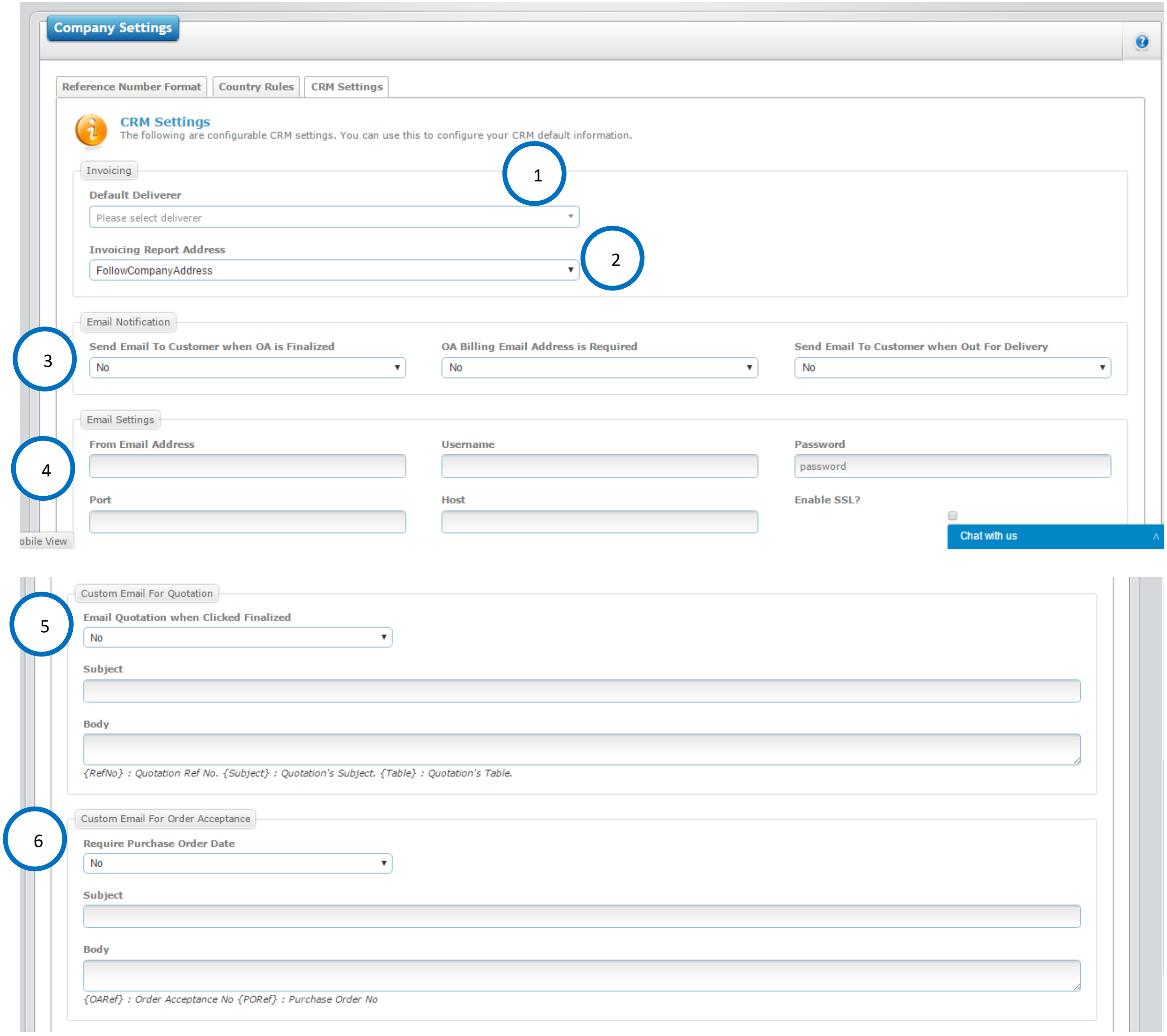


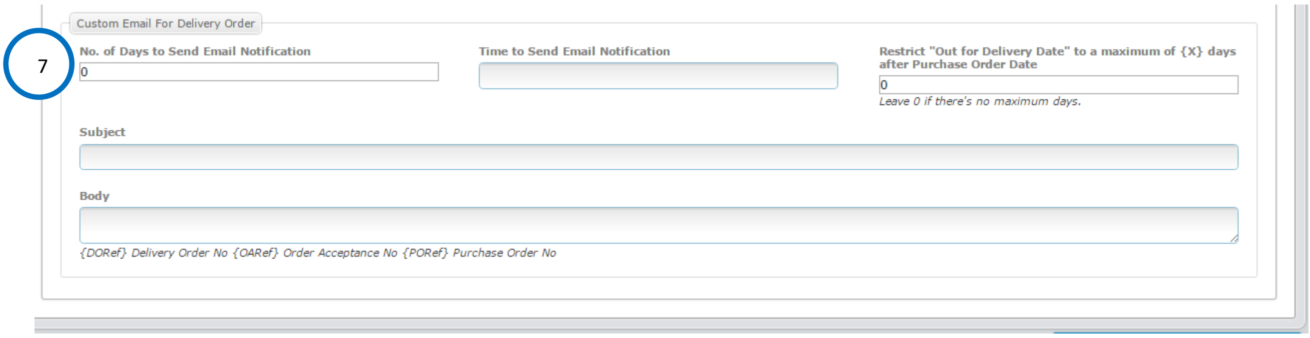
Here you can set the reference number for your CRM process. To set country rules, you can click on the 'Country Rules' tab which is next to the 'Reference Number Format' tab. Country rules is for the purpose to set language, GST and other rules in your country. You will see the display below for Country Rules.



Here you can select the relevant country.

You can click on the tab next to the 'Country Rules' tab to fix the settings for CRM. You will see the following display after clicking on the 'CRM Settings' tab:





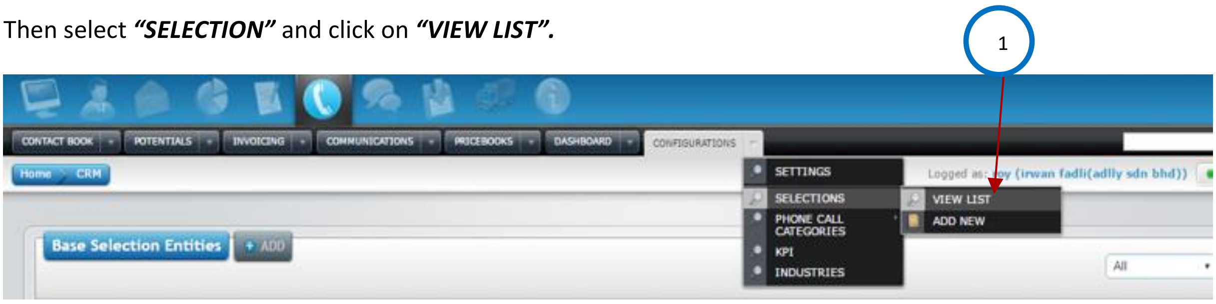
1	Identify staff which involve in creating invoice. Only the selected staff is authorized to create invoice.
2	Here you can set whether your invoice report will be based on your identified location or location of your head office only.
3	Set here for your email to be sent automatically after clicking the 'FINALIZE' button.
4	Here you can enter your email settings. You have to fill in all required data for your email here.
5	Fill in this section if you want to set a fix email to be sent to your customer for QUOTATION.
6	Fill in this section if you want to set a fix email to be sent to your customer for ORDER ACCEPTANCE.
7	Fill in this section if you want to set a fix email to be sent to your customer for DELIVERY ORDER.

1.0.2 SELECTIONS

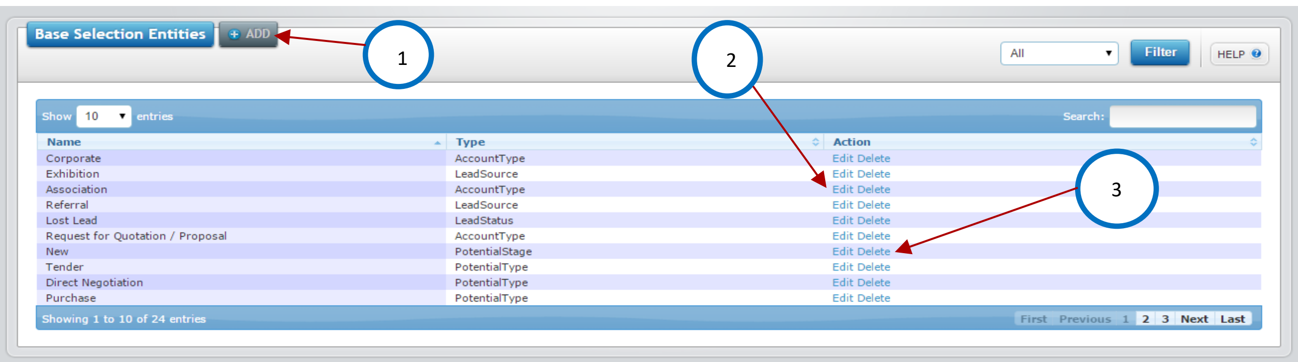
The selections section allows you to set your item category such as Account Type, Lead Source and many more.

For this CRM section, first you have to make a selection.

1. Click on ***"SETTING"*** section.
2. Then select ***"SELECTION"*** and click on ***"VIEW LIST".***



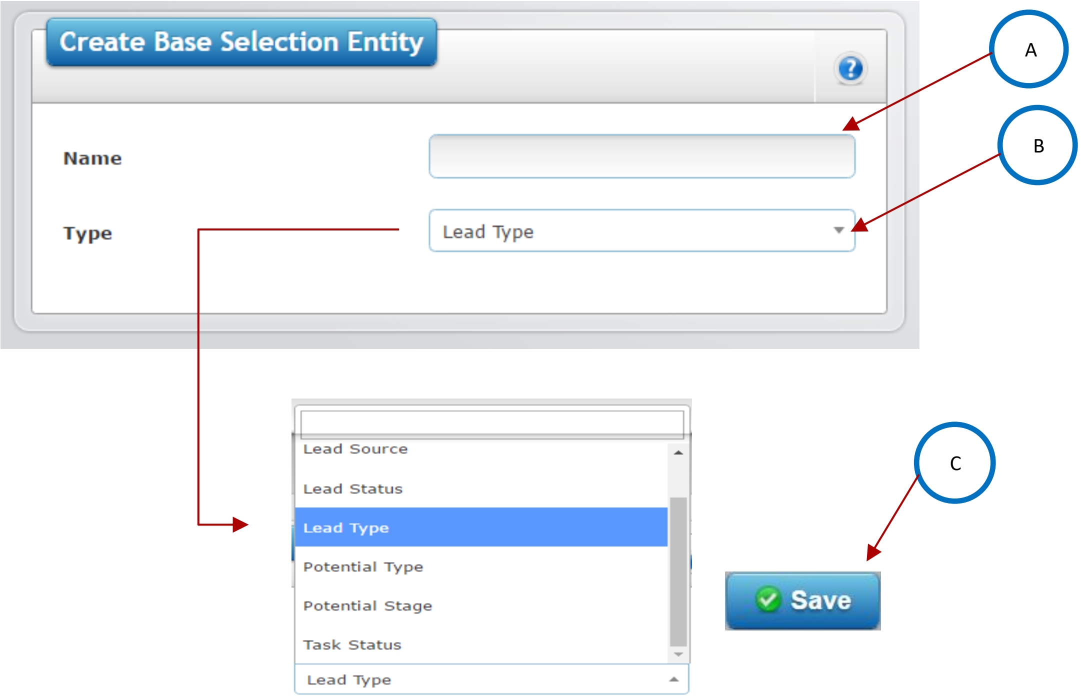
3. When you select ***"VIEW LIST",*** you will see all information as per the following picture.



Description:

1	Click on this button (Add) to add new selection.
2	Click on this button (Edit) to adit the data.
3	Click on this button (Delete) to erase the data. However, please note that data can only be erased if it is yet to be used. Once used, it can't be erased.

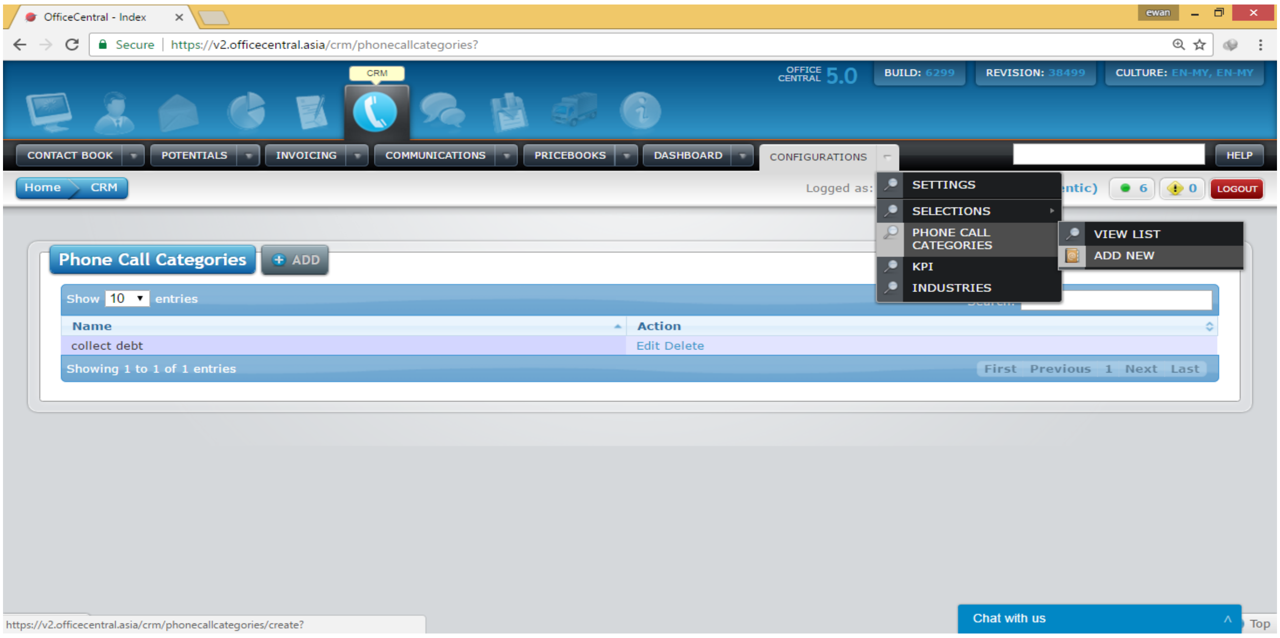
Next, when you select to add new selection, you will go to the following page:



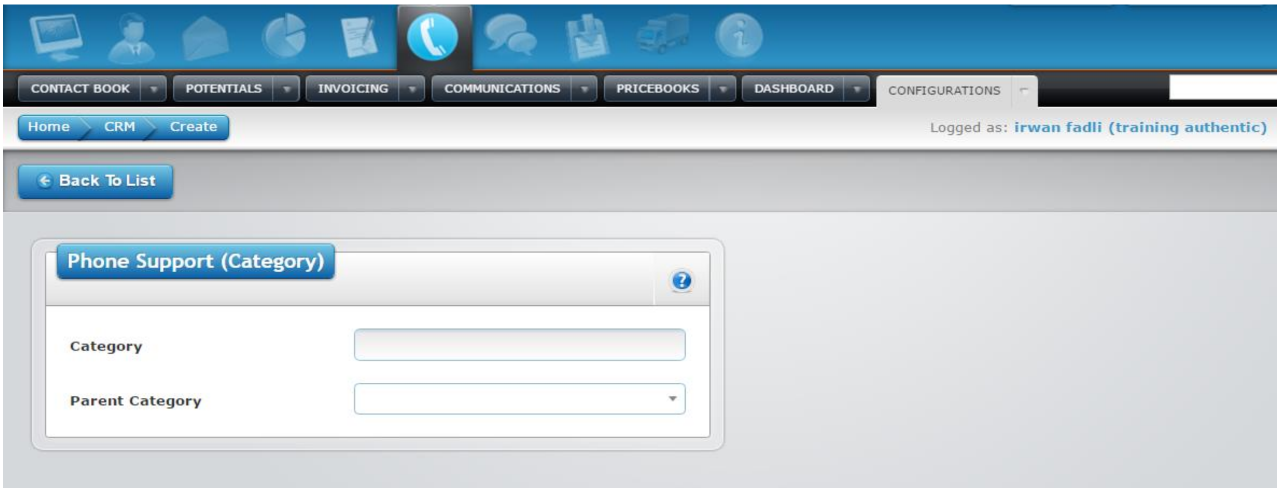
Description:

A	Key in selection name.
B	Choose type of selection. Information as follow: **Account Type**: Type of account **Lead Source**: Prospect source of information **Lead Status**: Prospect status **Lead Type**: Type of prospect **Potential Type**: Type of Prospective/Potential/Opportunity **Potential Stage**: Stage of Prospective/Potential/Opportunity **Task Status**: Work status
C	Click on this button to enter the new data.

1.0.3 Phone Call Categories



Here is the display to set Phone Support Category. This category will be displayed when you want to generate phone record. To add, you can click on "ADD NEW" button. You will be able to see the following display:

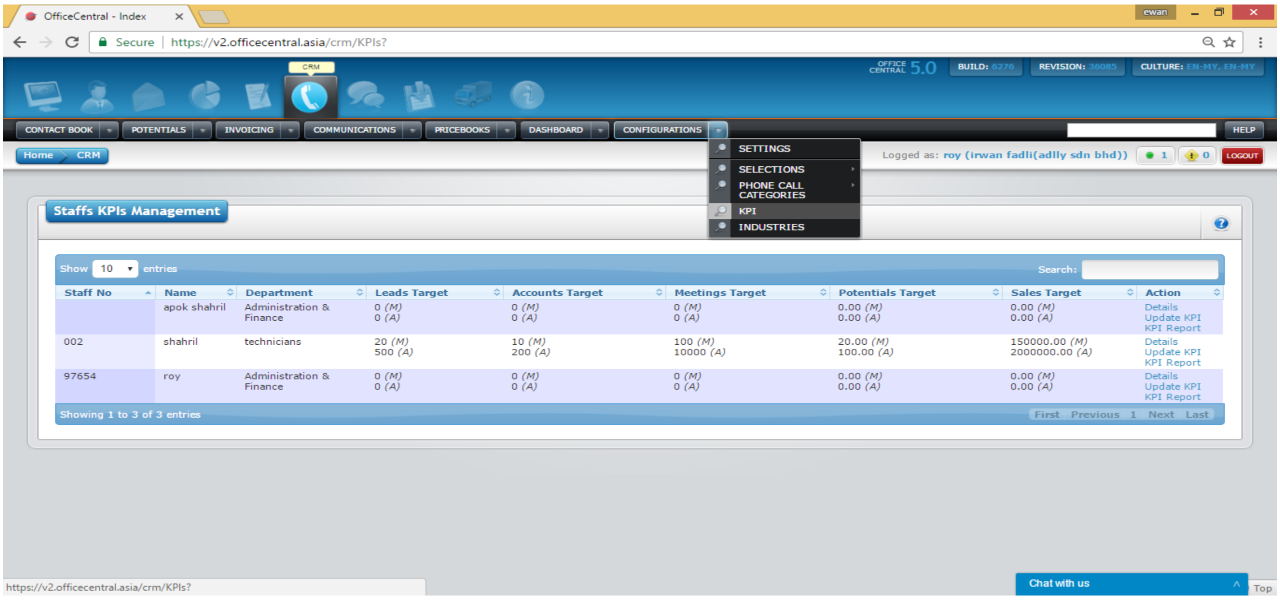


You only need to key in category type as desired. If you have the sub-category, you can set the beginning category first. Only then you can set the sub-category for that category.

1.0.4 KEY PERFORMANCE INDEX (KPI)

This module is to access the ability of a salesperson individually to achieve the target set in OfficeCentral system. When you select the Key Performance Indicator section in the Configuration section in CRM, you can view how far a staff can achieve their respective KPIs.

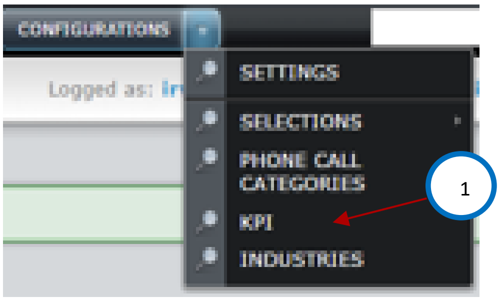
1. To access this module, go to CRM module and select ***"CONFIGURATIONS"*** section and select ***"KPI"***.



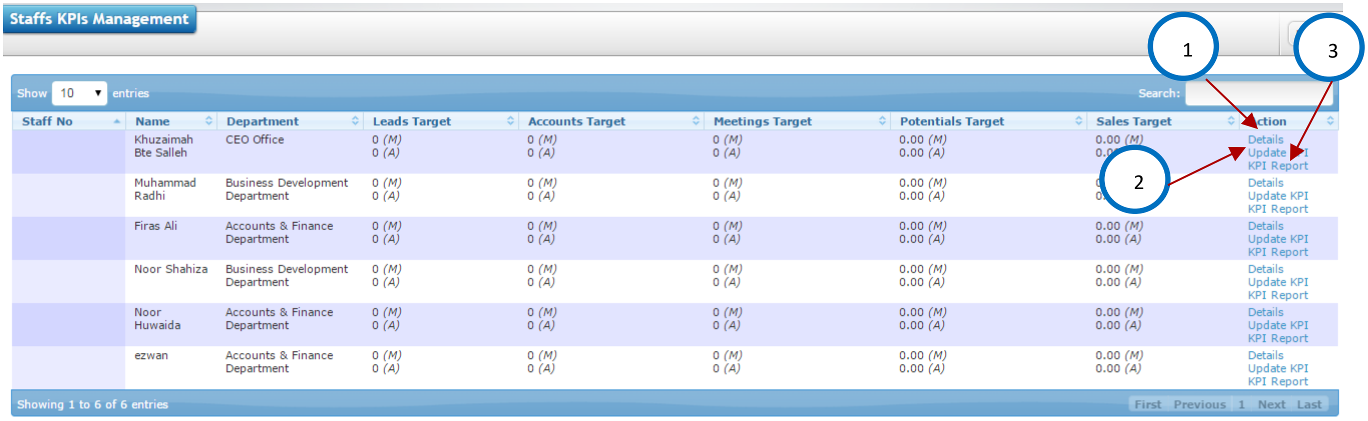
Above is the display if you click on the KPI button. Here it shows the number of KPI set for staff.

To view the overall KPI for staff, follow the steps below:

1) Click on ***"KPI"*** as shown by pointer 1 below to view their detail KPI or to update their KPI.



2) Then, you can view the details, update KPI and report KPI as per the following picture.



Description:

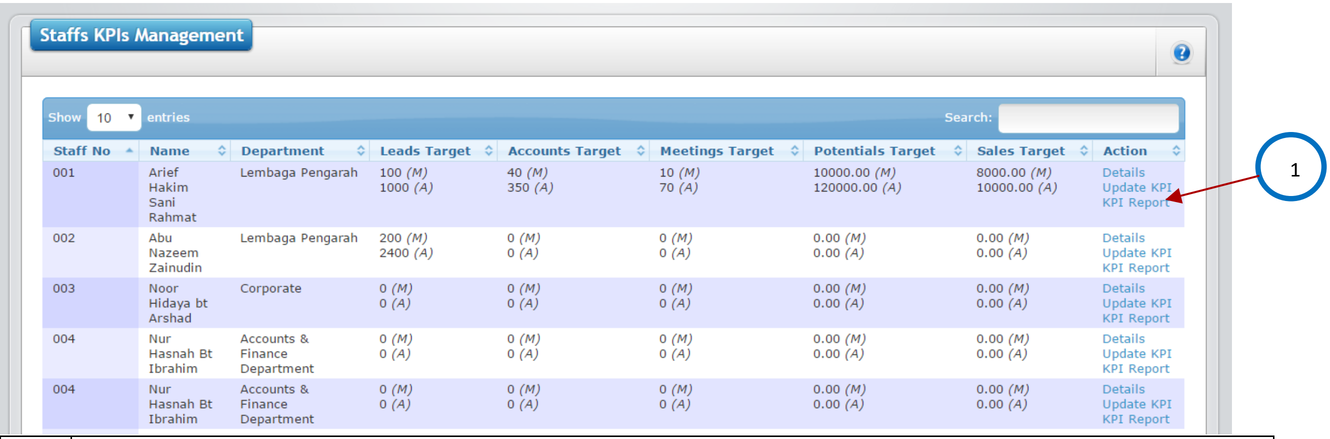
1	Click this button (Details) for view salesperson KPI status.
2	Click on this button (Update KPI) to update or improve KPI.
3	Click on this display button (KPI Report) to display KPI report.

You can set a yearly and monthly target by click on the ***"UPDATE KPI"*** button:

- ***"Leads"*** will be counted based on number of new leads added to the system.
- ***"Accounts"*** will be counted based on number of new accounts added to the system.
- ***"Meetings"*** will be counted based on number of meetings attended and recorded in "Meetings" in the system.
- ***"Potentials"*** will be counted based on the amount of potential project recorded in "OfficeCentral".
- ***"Sales"*** will be calculated based on sales amount.

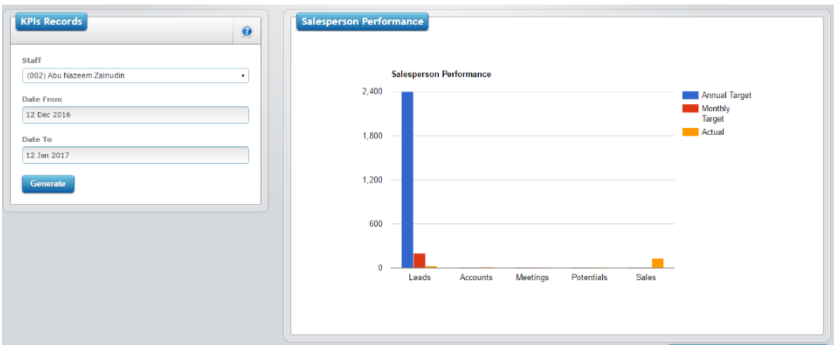
1.0.4.1 KPI REPORT

1. Click on ***"KPI Report"*** section under the KPI Configuration section in CRM.

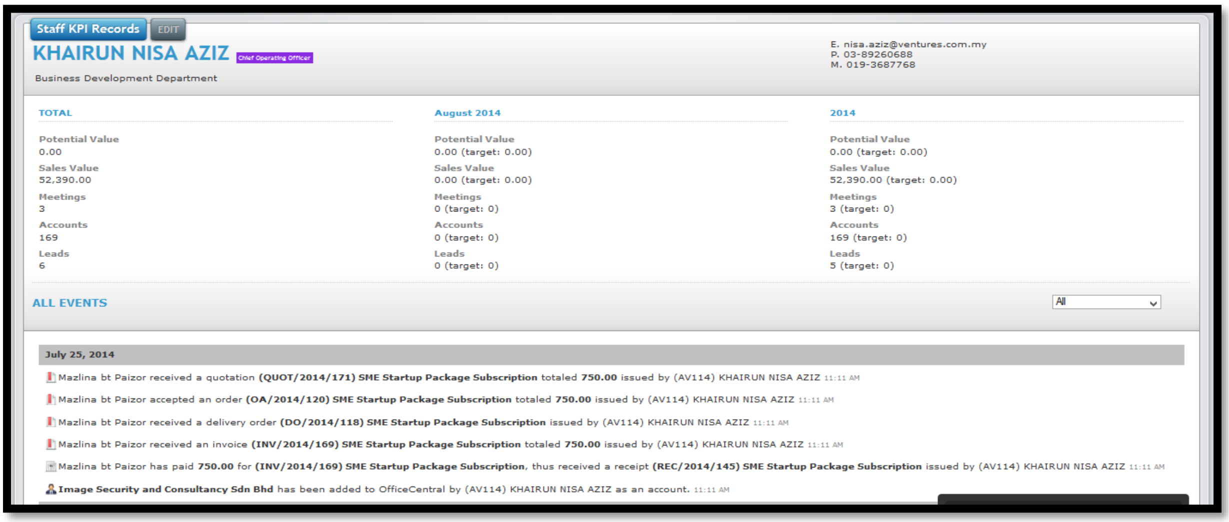


1	Click on this button to view list of KPI records.

2. On this page, you will be able to view salesperson KPI record for a particular date.

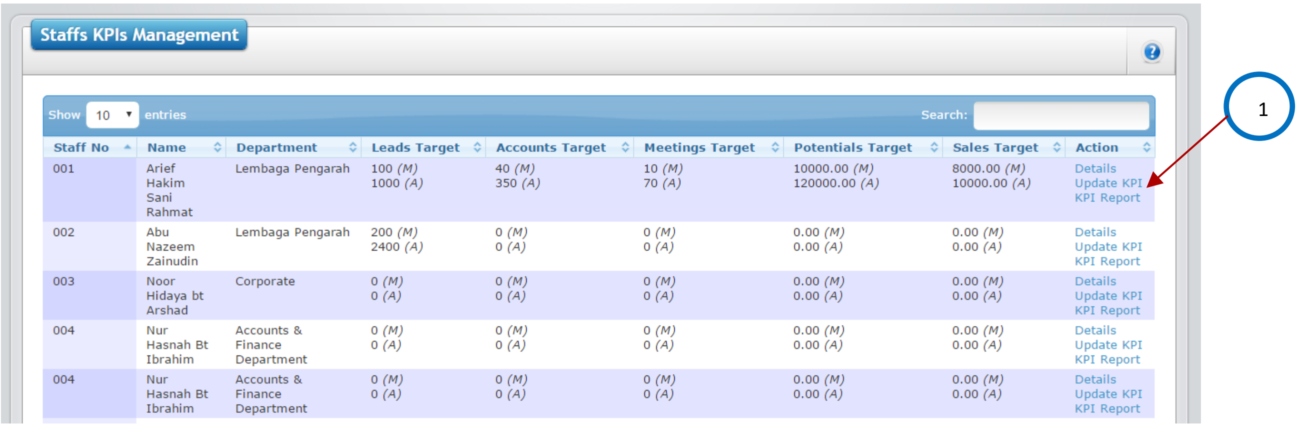


3. You will also be able to view staff KPI achievement through timeline as follow by clicking the details button.

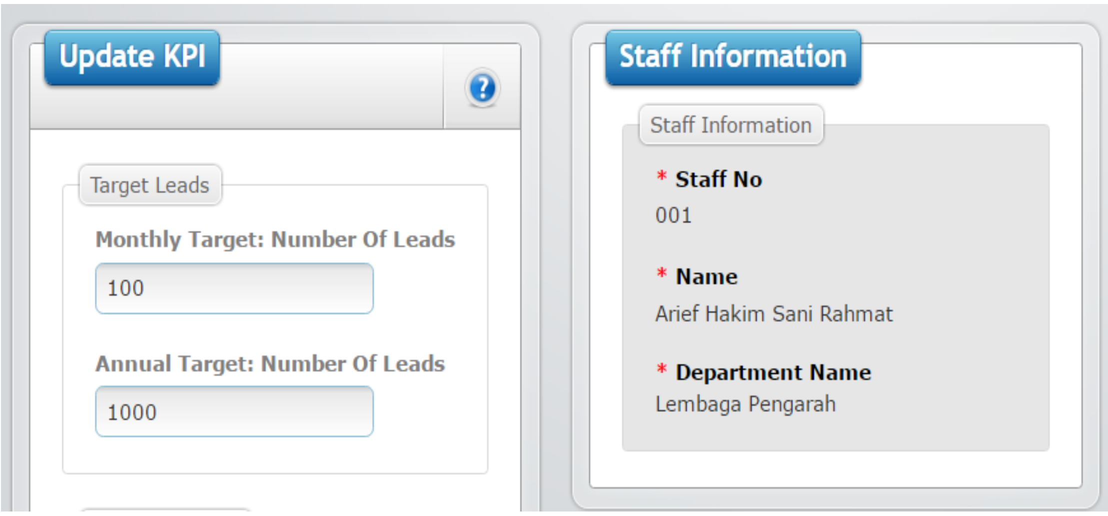


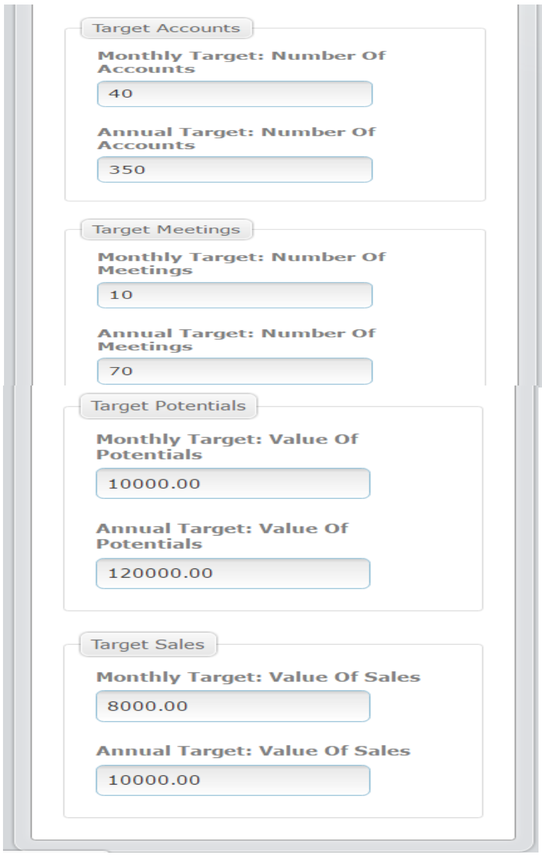
1.0.4.2 Update KPI

1) To fill in or update your staff KPI, please click on ***"Update KPI"*** as per the following picture:



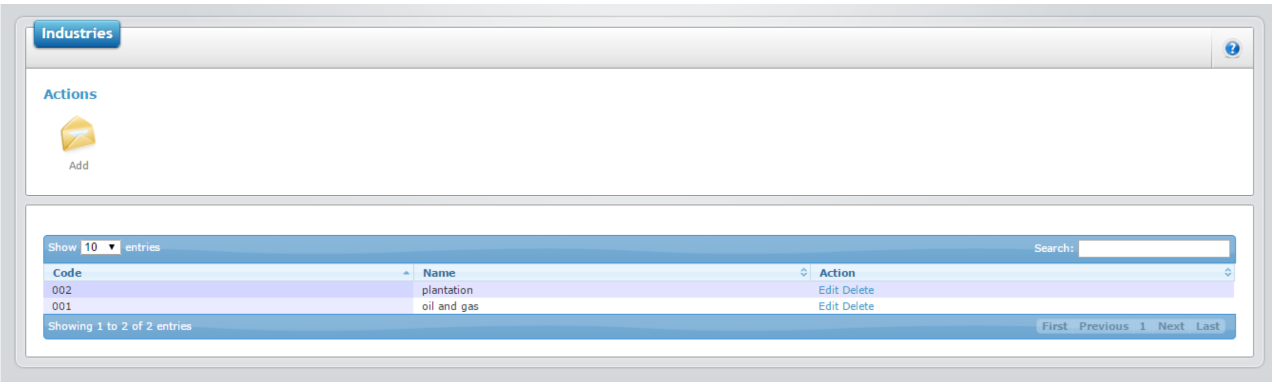
2) Then, you will be able to view the display below and fill in your company target:





1.0.5 Industries

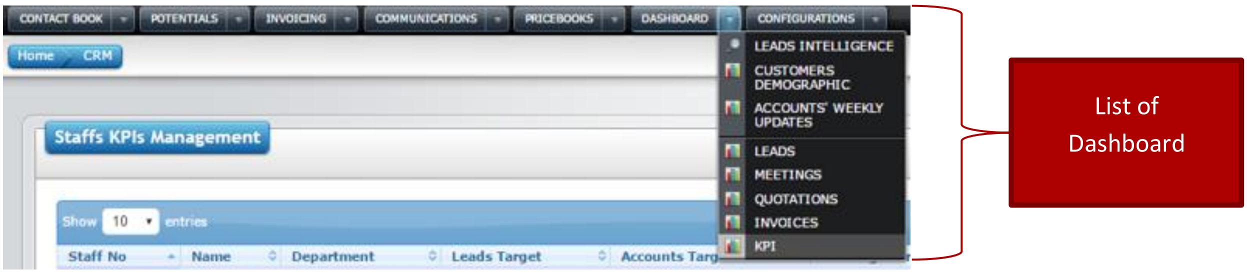
Industries if to set industries of your customers and suppliers. Below is the display for industry settings:



You can also add industry by clicking the button Add.

1.1 DASHBOARD

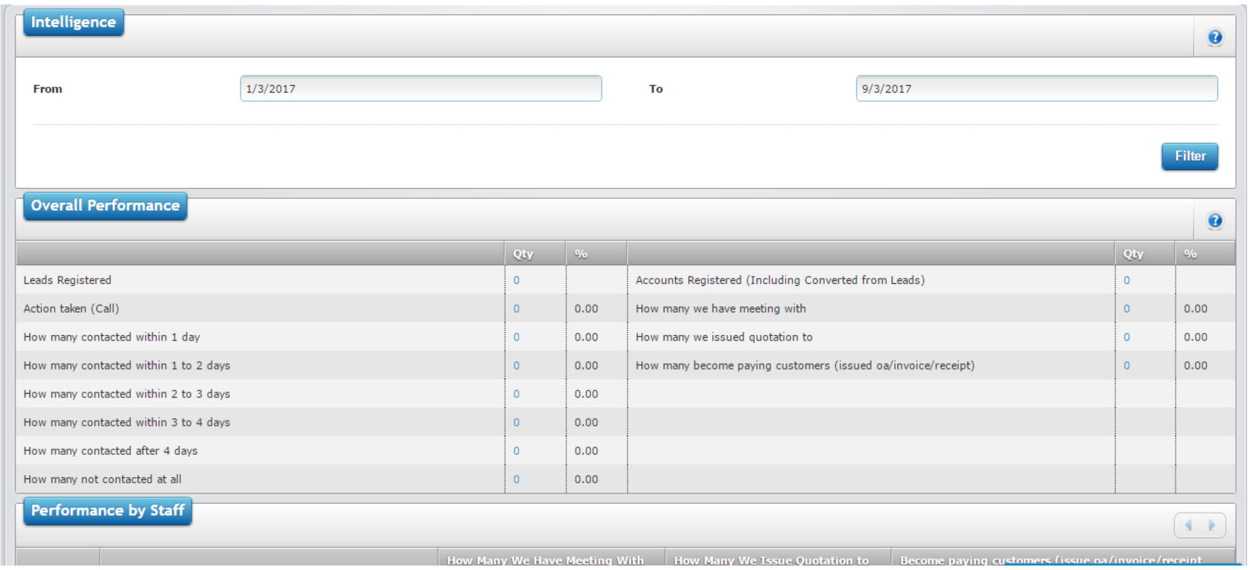
1. Select ***"DASHBOARD"*** section.



2. This system can also generate ***"DASHBOARD"*** information display on overall company's performance according to list of dashboards above.

1

Leads Intelligence

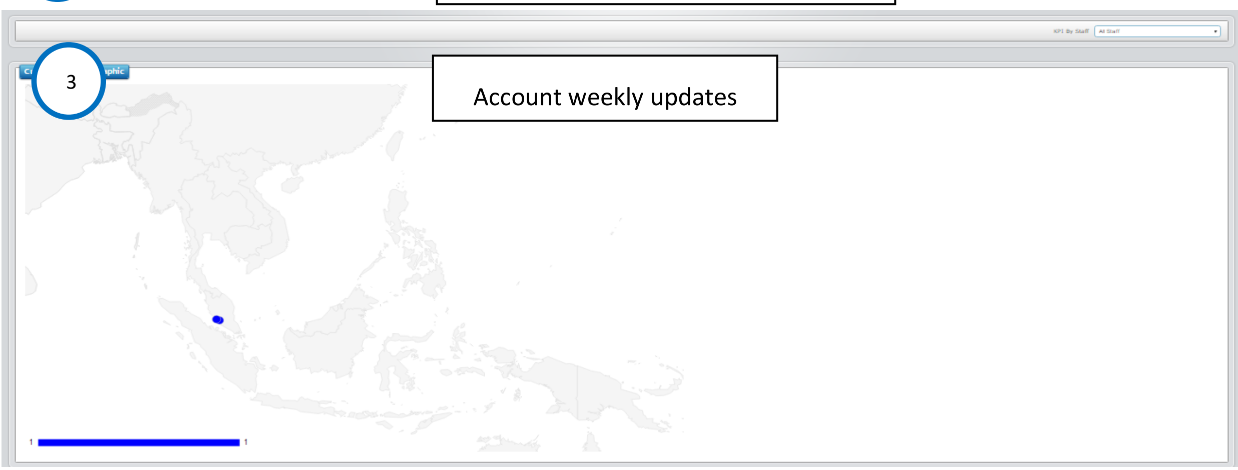


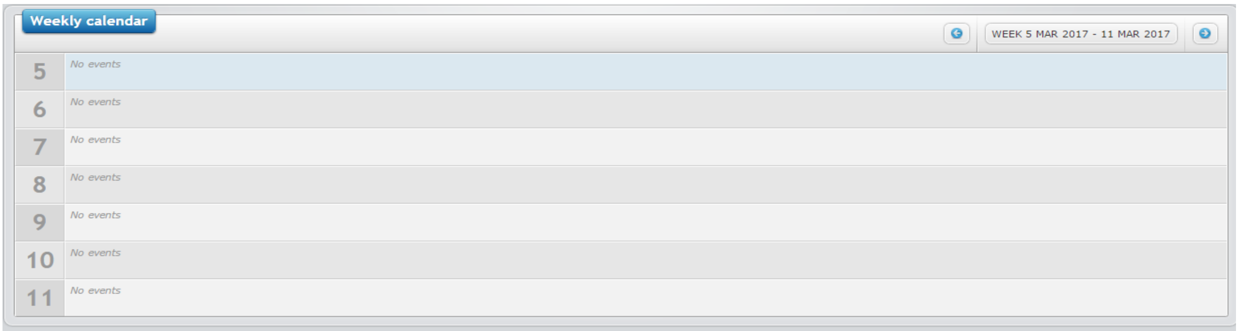
2

Customers' Demographic Dashboard

3

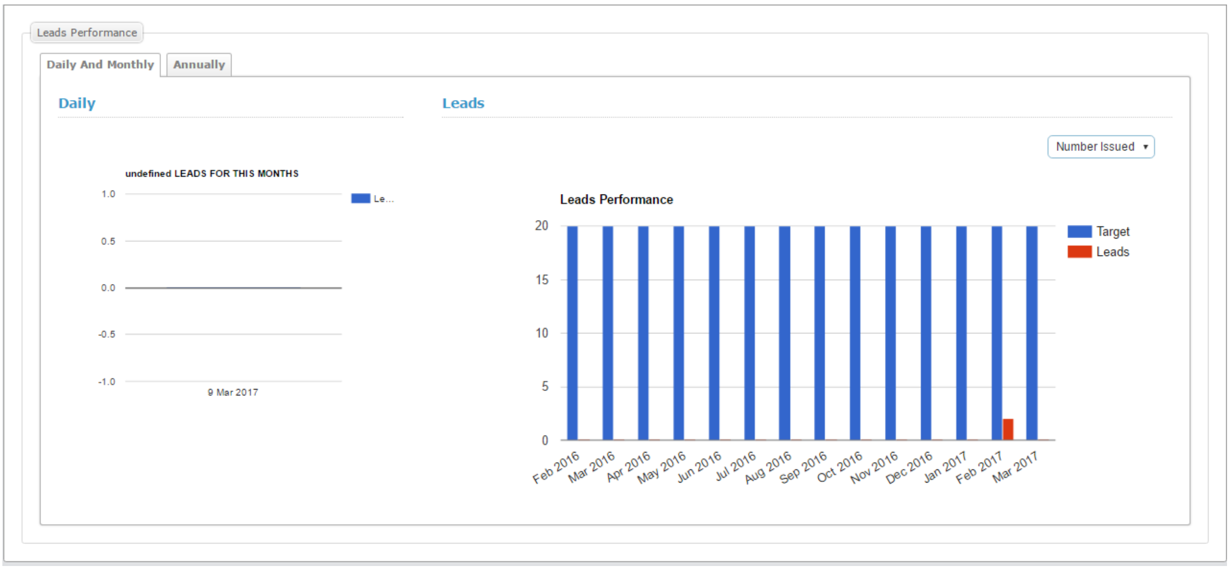
Account weekly updates





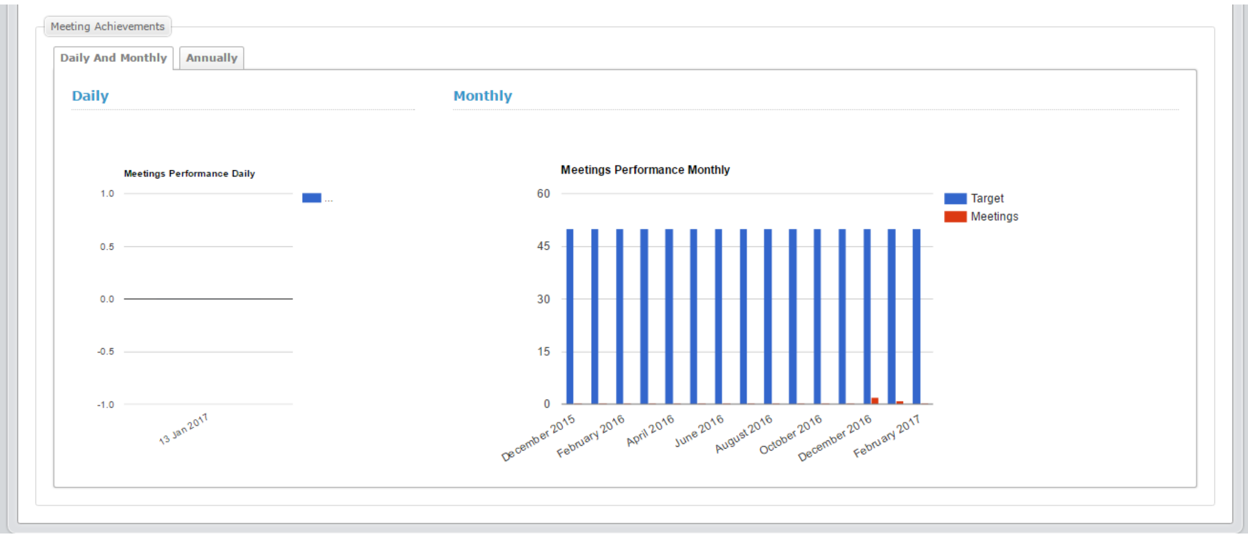
4

Leads Dashboard



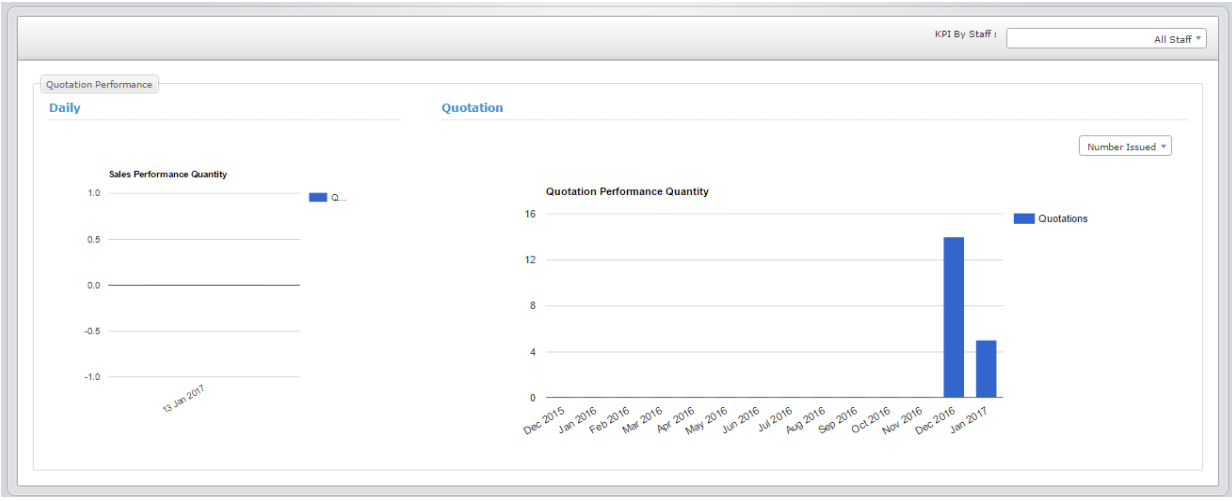
5

Meeting Dashboard



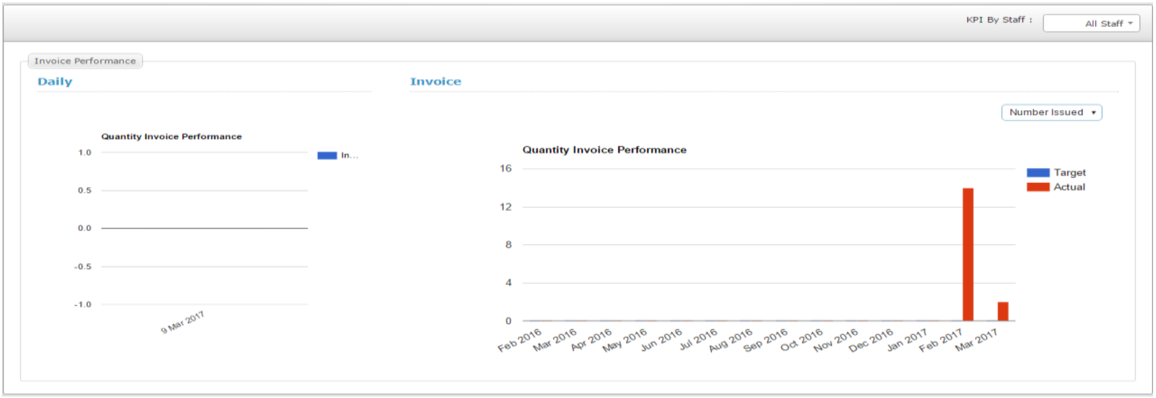
6

Quotation Dashboard



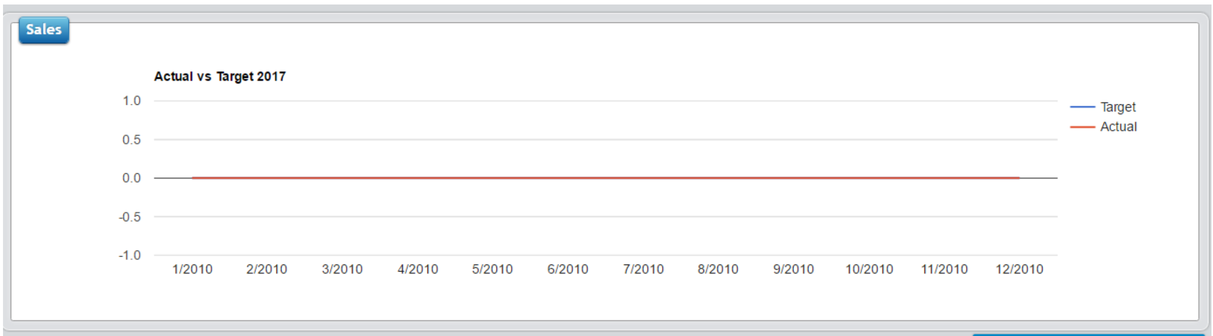
7

Invoice Dashboard



8

KPI Dashboard

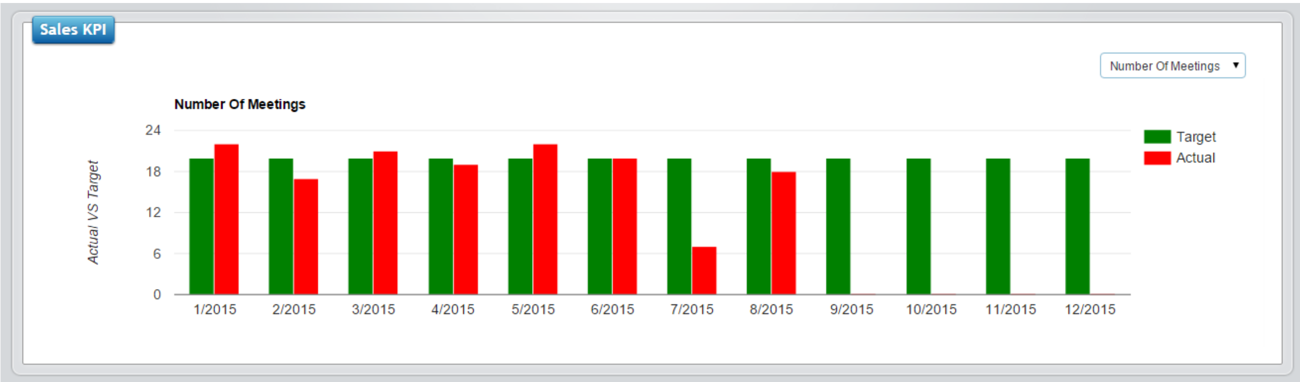


Display:

1	This display is to show your number of prospects and customers.
2	This display shows your customers plotted on map automatically. However, please be reminded that this plot can only be done if you have the information on customers' address.
3	This display shows your company's weekly activities.
4	This display shows number of prospects which your staff met.
5	This display shows number of meetings conducted by your company.
6	This display shows the number of quotations issued by your company.
7	This display shows the number of invoices issued by your company.
8	This display shows the real and target sales KPI set by your company.

1.1.2 DASHBOARD KPI

Dashboard KPI is used to view sales KPI of each staff in your company.



Select ***"Dashboard KPI"*** section and you can view target and real sales for each staff.

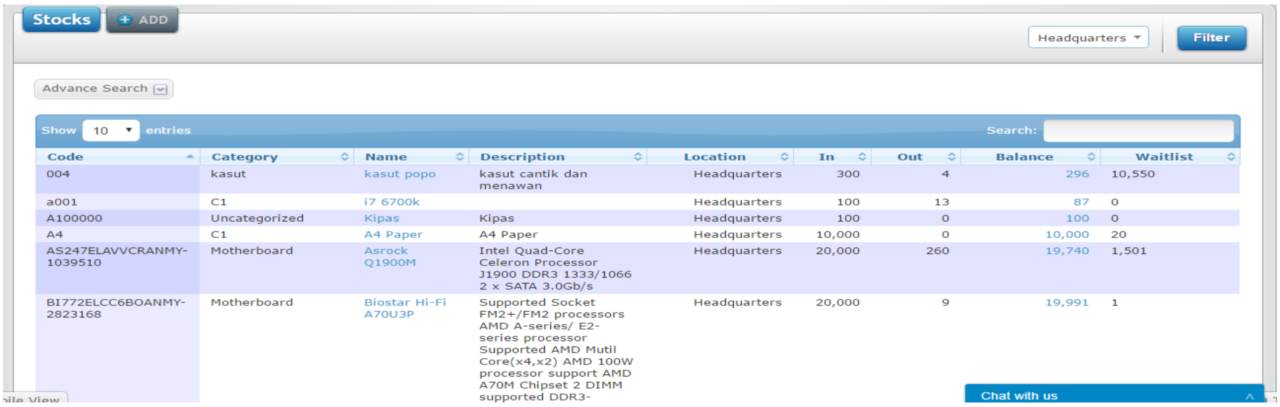
1.2 PRICEBOOK

Pricebook sub-module is used to view stock item in your company. Other than that, it is also used to set new products, set product prices and enter stocks for your products.

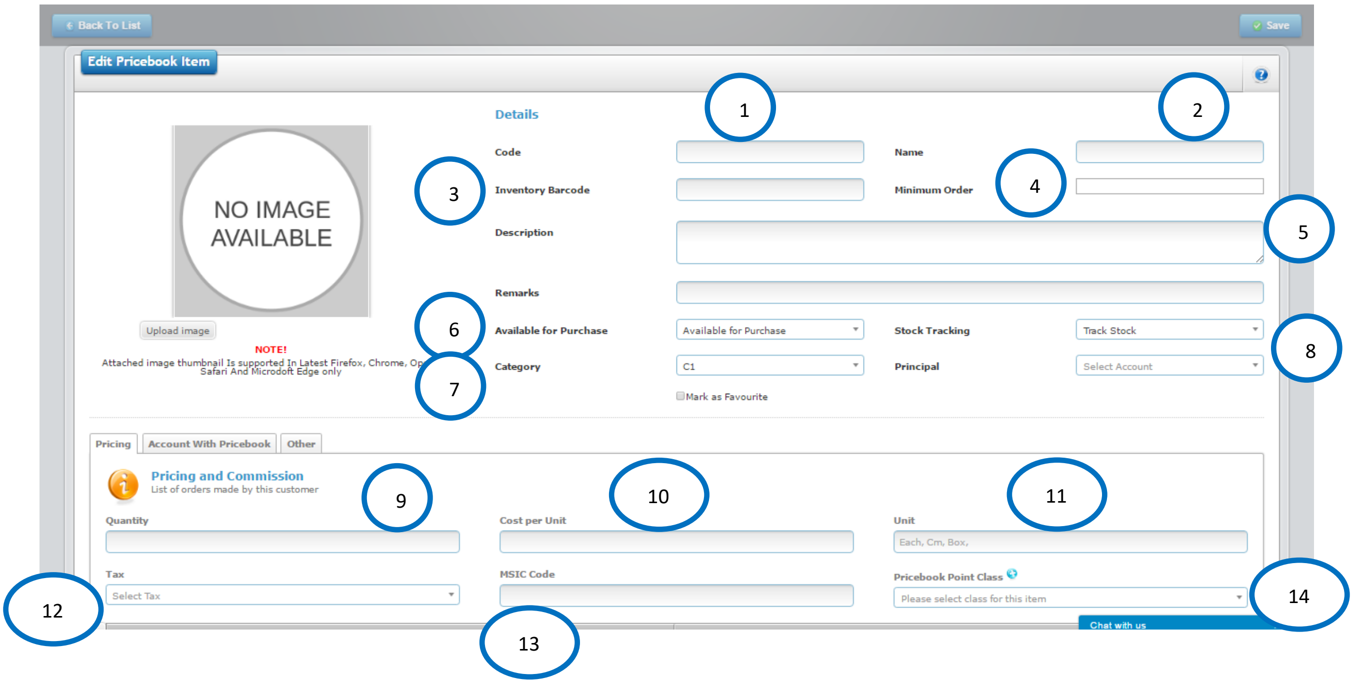
1.2.1 Stock List

At the***"STOCK LIST"*** section, you can view stock section in your company whether they can be sold and you can also see number of products in and out.

1. Select ***"STOCK LIST"*** in ***"PRICEBOOK".***



To add, click on ***"ADD".***



You can also set the image of your product. Only click on 'upload image' then select the picture of your product and now your product picture is available.

1	Key in product code.
2	Key in product name.
3	Key in bar code scanner.
4	Key in the minumum order for the product.
5	Please state description of the product.
6	Select ***"Available for Purchase"*** if the item is ready to be sold. If you only want to key in the data but the item is not yet ready to be sold, please choose ***"Not Available for Purchase".*** If you choose this option, you can key in the data required, however you will not be able to select the item when preparing quotation, etc.

7	Please key in item category if any. Category means if you are selling a number of products in a category.
8	Please select to track or not to track stock.
9	Please key in initial quantity of unit to be added in your inventory.
10	Key in the cost of your product.
11	Key in measurement unit of the item.
12	Select relevant tax code. For example: SR (6%)
13	Key in MISC cost if any.
14	Key in points if your company sell points that allows points collection to be redeemed.

1.2.2 Pricebook

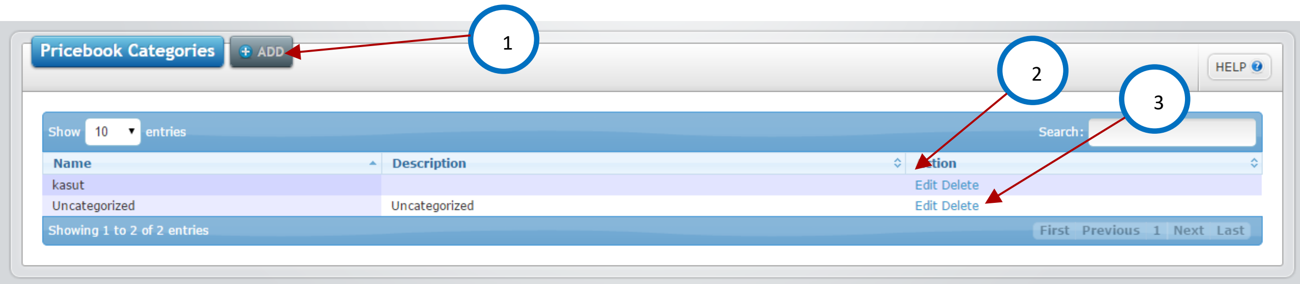
"PRICEBOOK" is a list of item sold by the company. For instance company's product. To list company's products, click on button ***"ADD"*** in the ***"PRICEBOOK"*** section.

Select ***"PRICEBOOK"*** and **"ADD NEW"** in **"PRICEBOOK"** in CRM.

1.2.2.1 PRICEBOOK CATEGORIES

"PRICEBOOK" category is product or service category offered to your customer. You need to set the suitable category with your company to make the system usage more effective and compatible with company's policy.

1. Go to ***"SETTINGS".***
2. To do this, click on ***"SETTINGS"*** and select "***PRICEBOOK CATEGORIES***". You can see list of categories price register as follow:



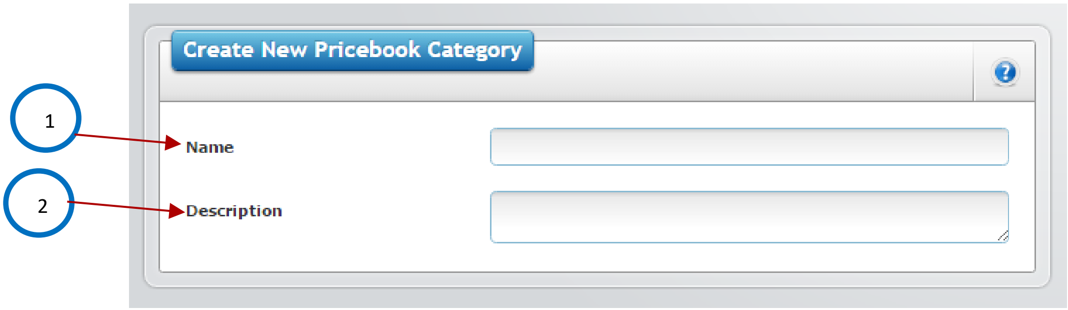
Description:

1	Click on this button to add new category.
2	Click on this button to update data.

3	Click on this button to erase data. However, please note that data can only be erased if it is yet to be used. If used, if can't be erased.

Next, when you click ***"ADD NEW"***(A) to create new pricebook category, you will be the following display:

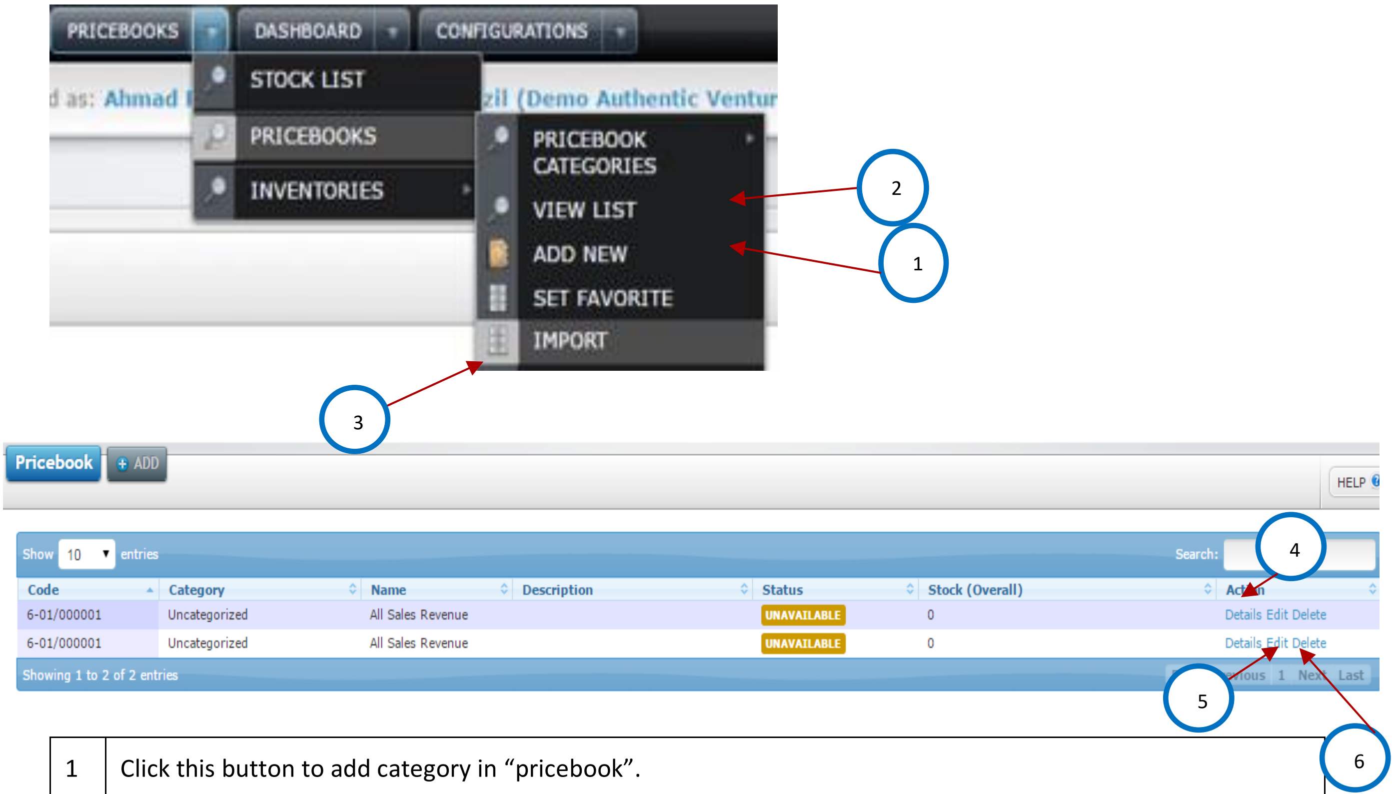
1. You can determine the ***"Name"*** and ***"Description"*** of the new category.



Description:

1	Enter the category name.
2	Enter relevant information for the category.

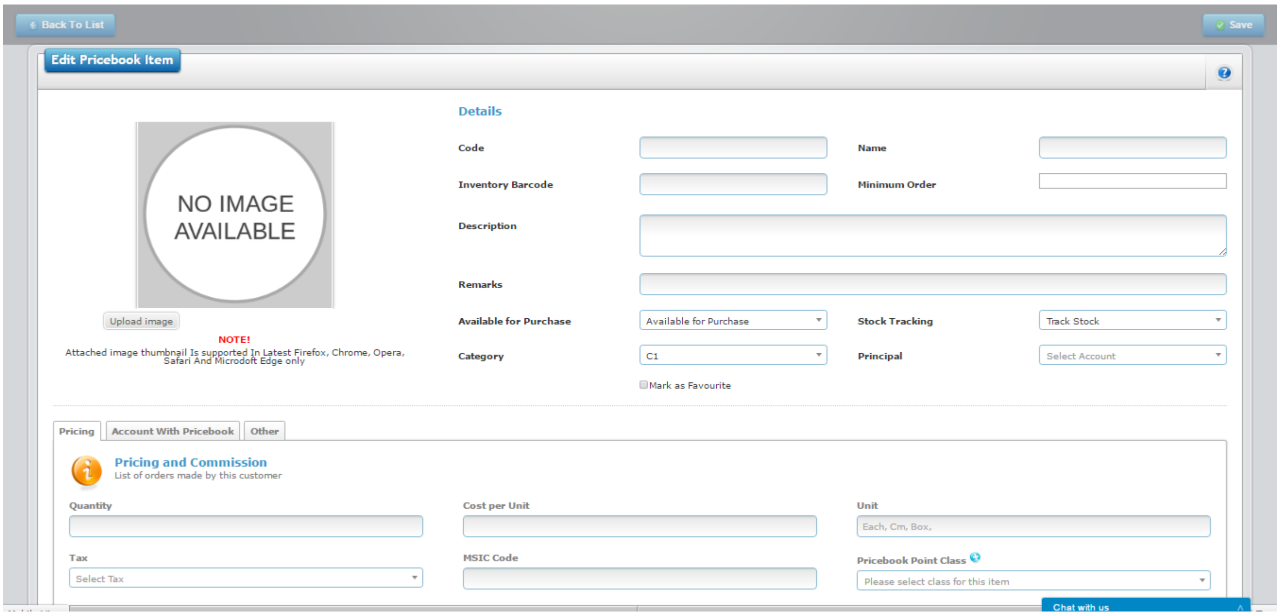
2. Select **"PRICEBOOK"**, in **"PRICEBOOK"** and click on ***"VIEW LIST"*** to view overall pricebook list.



1	Click this button to add category in "pricebook".
2	Click this button to add "pricebook" list.

3	Click on this button if you would like to import pricebook list. Please not that the pricebook to be imported must be in excel format and contains the relevant column.
4	Click on this button if you woud like to view pricebook detail.
5	Click on this button to edit any pricebook list.
6	Click on this button if you would like to erase any information.

3. Select ***"ADD NEW"*** to add pricebook.



- Click on "save" button if you change any of the information.

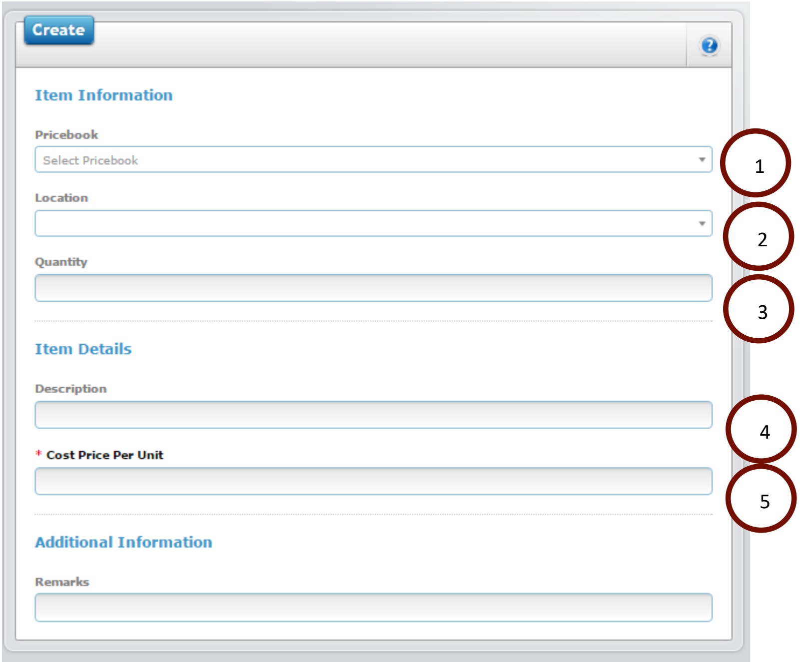
****note: same explanation as per 'add new' figure in stock list status above.***

1.2.3 INVENTORY

Inventory is the list of items or products of a company. Inventory needs to be added when there is a new purchase and system will automatically reduce the count from inventory when there is a purchase of ***"DELIVERY ORDER"*** issued through the system.

1. Select ***" INVENTORY"*** under Pricebook in CRM.
2. Click on ***"ADD"*** to add new inventory.

3. After clicking on the Add New button, you will see the display below.

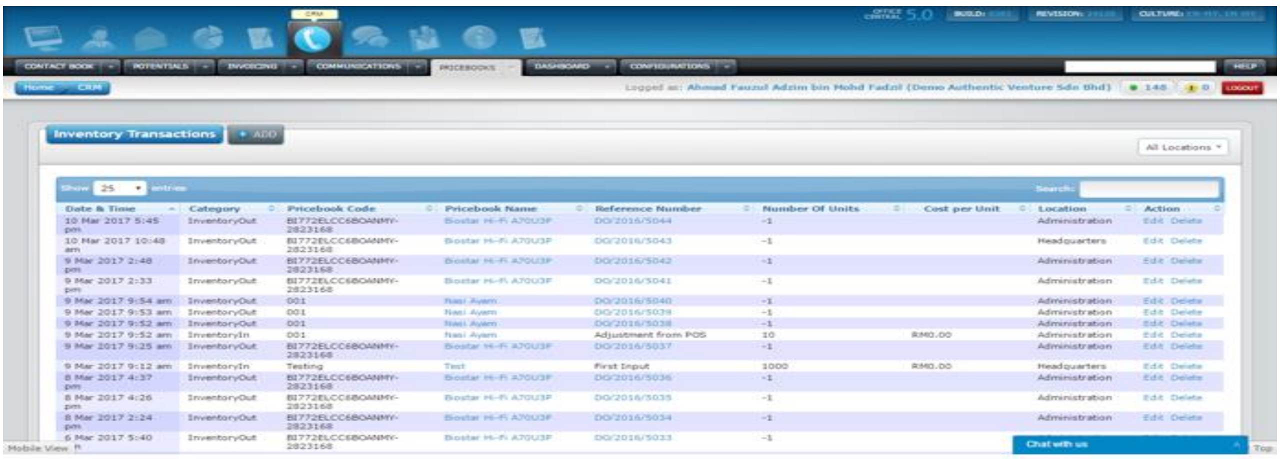


Description:

1	Please select the relevant pricebook.
2	Please select inventory location whether is it the HQ or other location.
3	Please state quantity of the item or product involved.
4	Please state item description.
5	Please enter cost per unit.

4. Click on ***"SAVE"*** when you are done filling in the information.

5. Click on ***" VIEW LIST"*** to view your company's inventory list. You will see the display as follow:

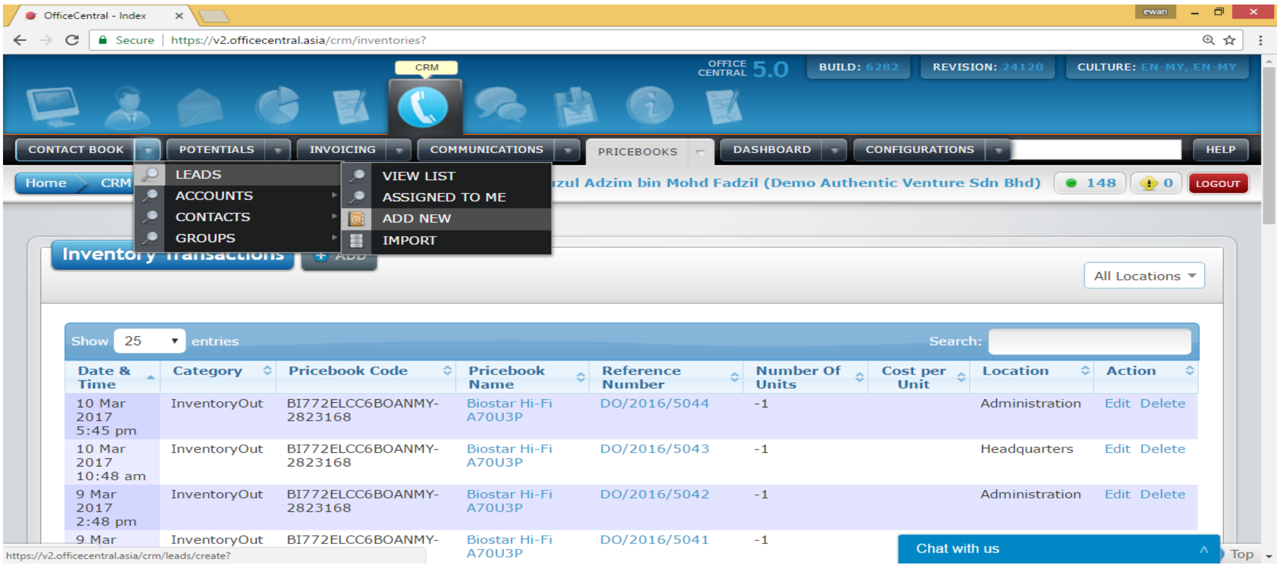


1.3 CONTACT BOOK

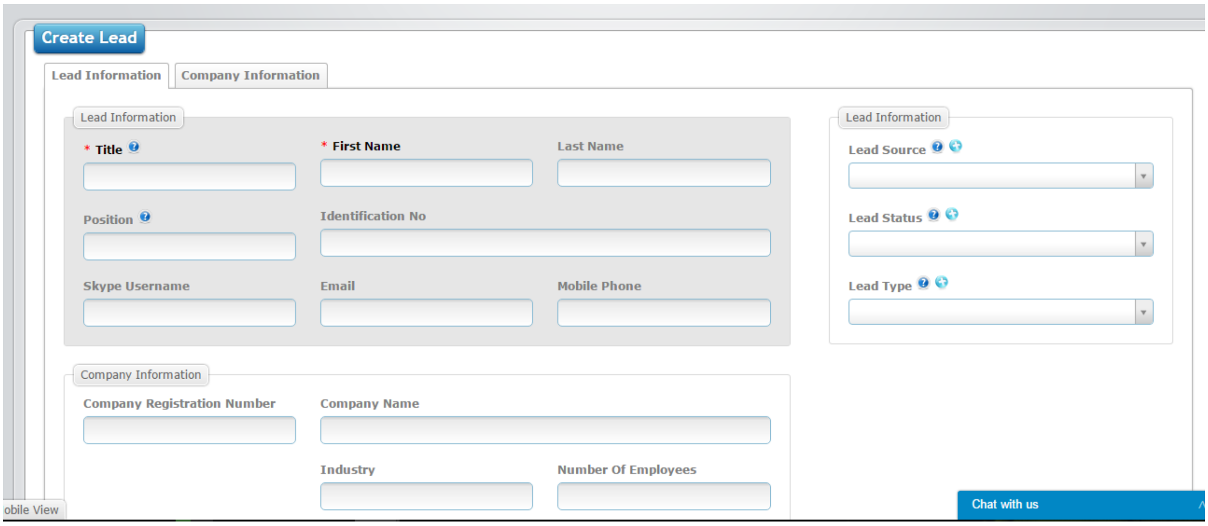
1.3.1 LEADS

1. ***"LEADS"*** is sales opportunity (whether it is company or individual) collected from various sources during their marketing process. For instance, exchange of business cards during an event or seminar That individual may be your customer.

2. When you are in CRM module, move your cursor to **"CONTACT BOOK",** and select **"LEADS"** then click on **"ADD NEW".**



3. Click on "**ADD NEW**" and you can add new ***"LEADS"***.



Please complete the required “lead” information.
Title: Please key in “lead” title such as Mr, Ms, Dato’, Dr, etc.
First name: Key in “lead” name.

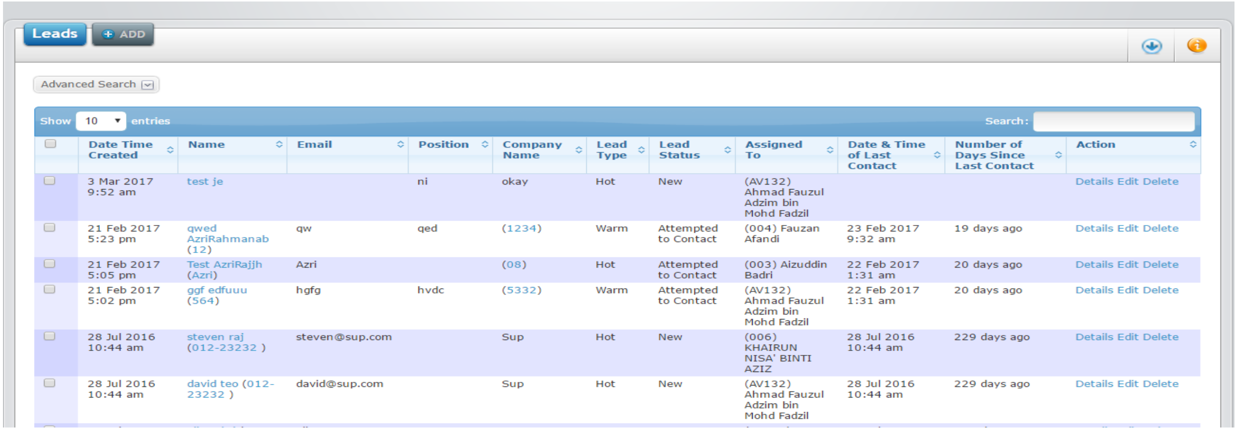
Note: Please be reminded that you are required to complete the information marked with *.

Please fill in the required information.

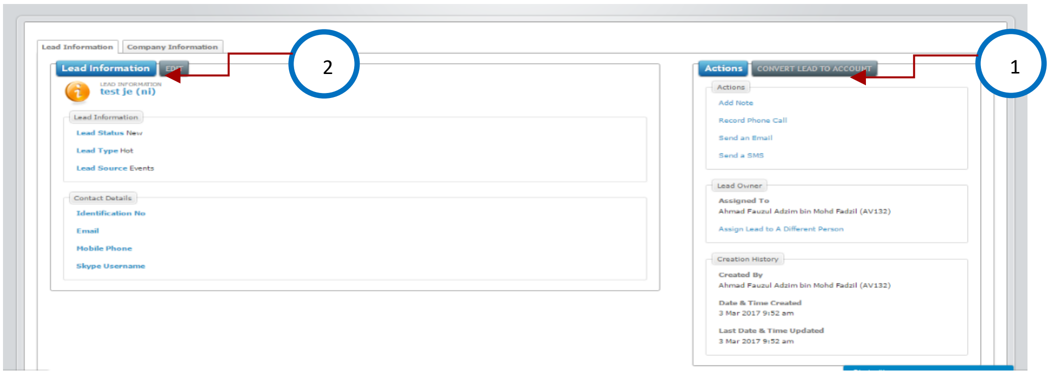
For “lead” section, there are 3 categories: *Hot, Warm, Cold.*

You can choose the ***“Hot”*** category for prospect who really wanted to purchase your product, ***“Cold”*** for potential customer who does not give good response while ***“Warm”*** is for customer who shows moderate interest.

4. Once new lead is added, you can view the following display after clicking on the ***“VIEW LIST”*** button.



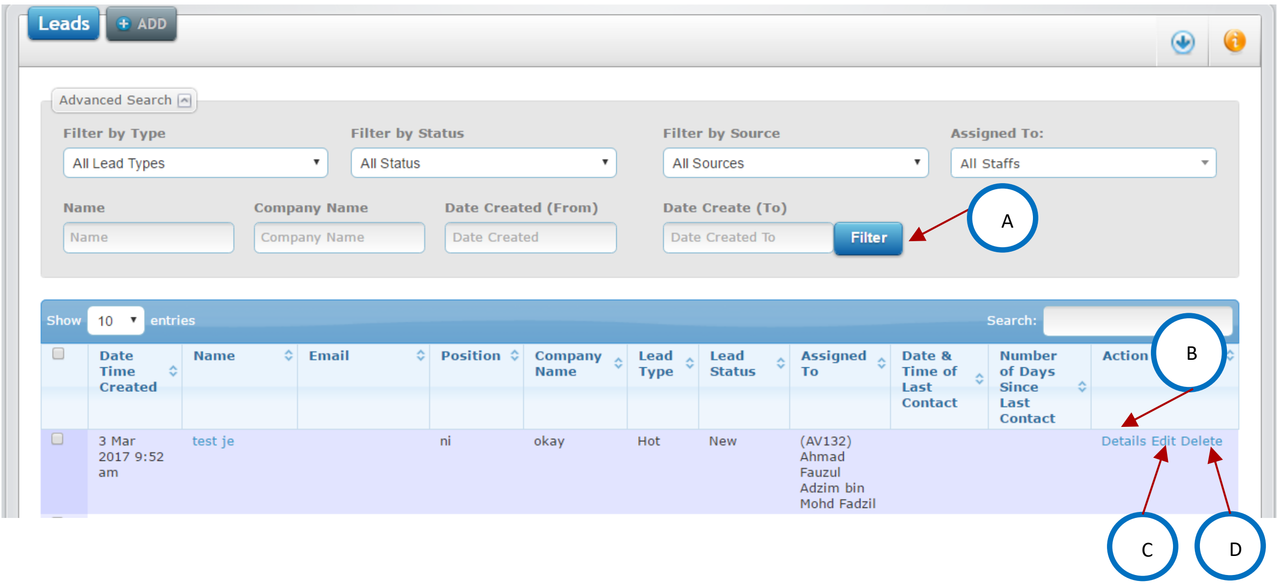
5. You could also convert your *lead* to *account* if the *lead* has become your customer. You can click on the *details* button to convert *lead* to *account*. You could also click on the *edit* button to amend information about the *lead*. Click the *delete* button to erase the *lead*. Below is the example when you click the *details* button:



Description:

1	Click on this button to convert ***“LEAD”*** to ***“ACCOUNT”***. Note: ***“LEADS”*** can be converted to ***“ACCOUNT”*** once you found out that the prospect has a potential to carry out sale and purchase transaction with your company.
2	Click on this button to amend information about your *lead.*

6. After converting ***"LEAD"*** to ***"ACCOUNT"***, please go to ***"Back To List"***. You may refer the picture below:

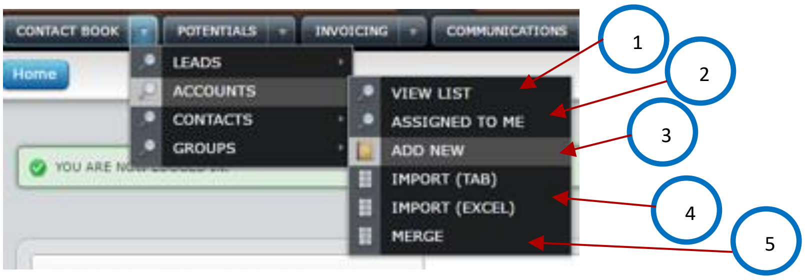


A	Click on this button to filter information base on your requirement.
B	Click on this button to view complete details.
C	Click on this button to edit data.
D	Click on this button to delete related data.

1.3.2 ACCOUNTS

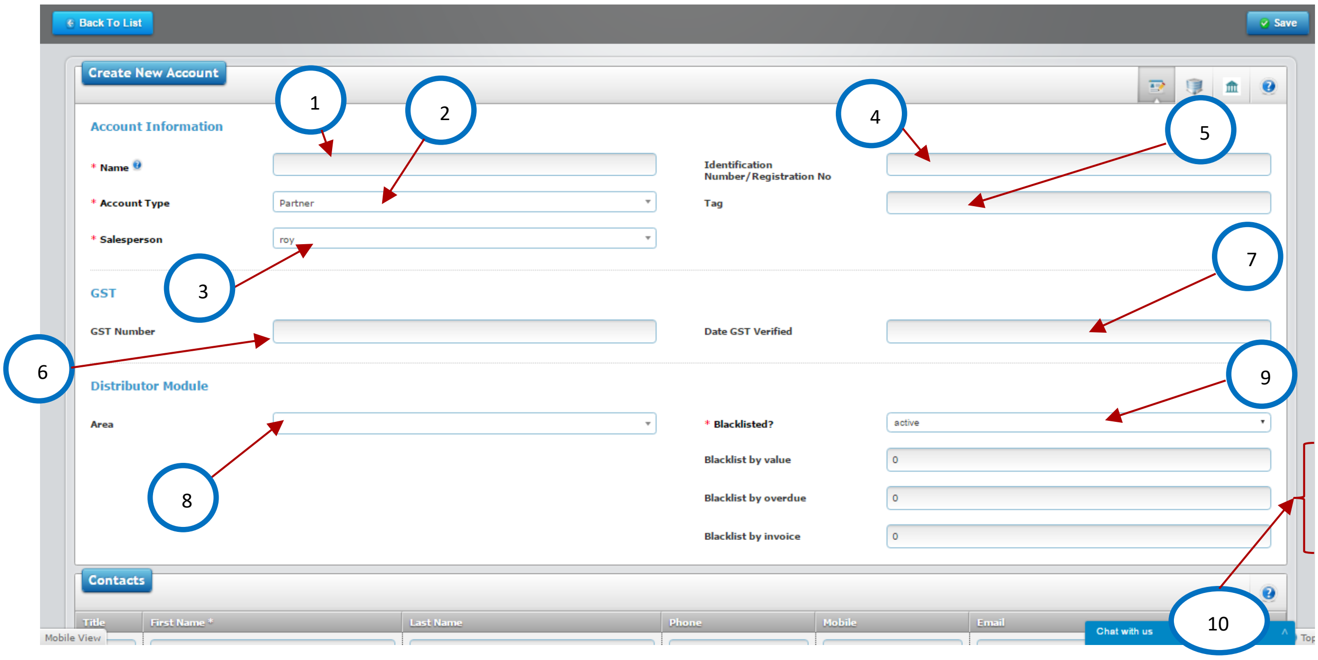
1. "***ACCOUNTS***" is a company (or an individual) which has sales opportunity. They may be your previous or future customers.
2. All "***ACCOUNTS***" are you customers. Company "***ACCOUNTS***" depend on your business. "***ACCOUNTS***" could also be used to record individual who pays for your service.
3. Select ***" CONTACT BOOK"*** and click on ***"ACCOUNTS"*** then click on ***"VIEW LIST".***

Once you've selected ***"VIEW LIST",*** you'll be able to view list of customers in ***"ACCOUNTS"*** as per the display below:



1	Click to view list of your accounts.
2	Click to view the number of accounts assigned to you.

3	Click on this button to add ***"ACCOUNT"*** information.
4	Click to import account from external file such as excel or paste into the system.
5	Click to combine 2 ***"ACCOUNT".***

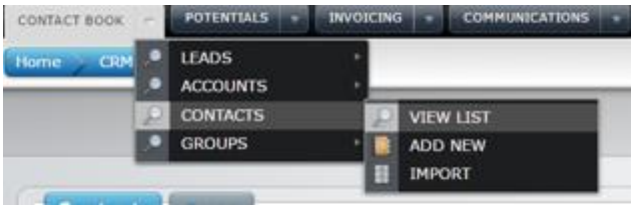


Description:

1	Please key in account name. You are required to fill in all information marked with *.
2	Please select the related account type.
3	Please key in the salesperson name related to this account.
4	Please key in account registration number.
5	Please key in related tag number.
6	Please key in GST account number if any.
7	Please key in the date GST being imposed on the account.
8	Please enter the coverage area if the account is also involved in distributor module.
9	Please key in whether the account is being blacklisted.
10	Key in information if account is being blacklisted.

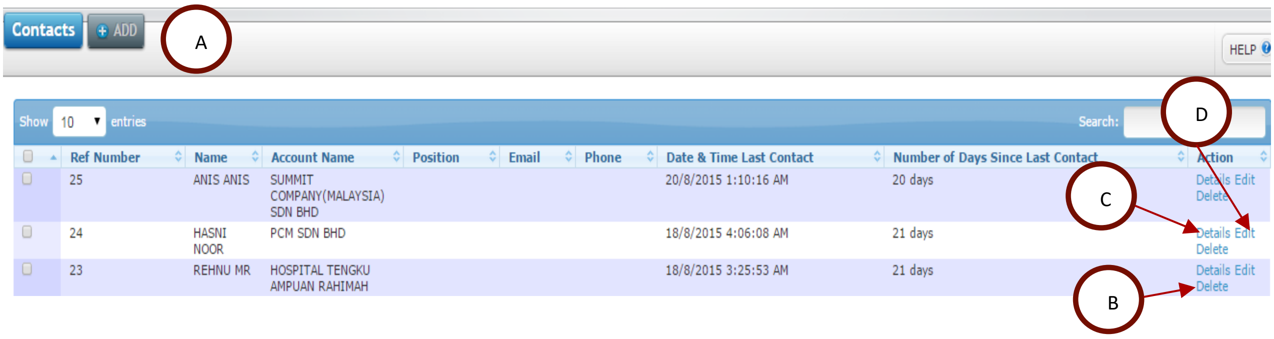
1.3.3 CONTACTS

"CONTACTS" is an individual who are within your "***ACCOUNTS***" network. "***CONTACTS***" may be an individual or acquaintance other than customer. For instance, "***CONTACTS***" is the staff of "***ACCOUNTS***" where "***ACCOUNTS***" is a company.



You can view the above picture when you click on "***CONTACT***" in *contact book*. "***VIEW LIST"*** is to view your contact list, ***'ADD NEW'*** is to add new contact to your company while '***IMPORT'*** is to import data from external file into the system.

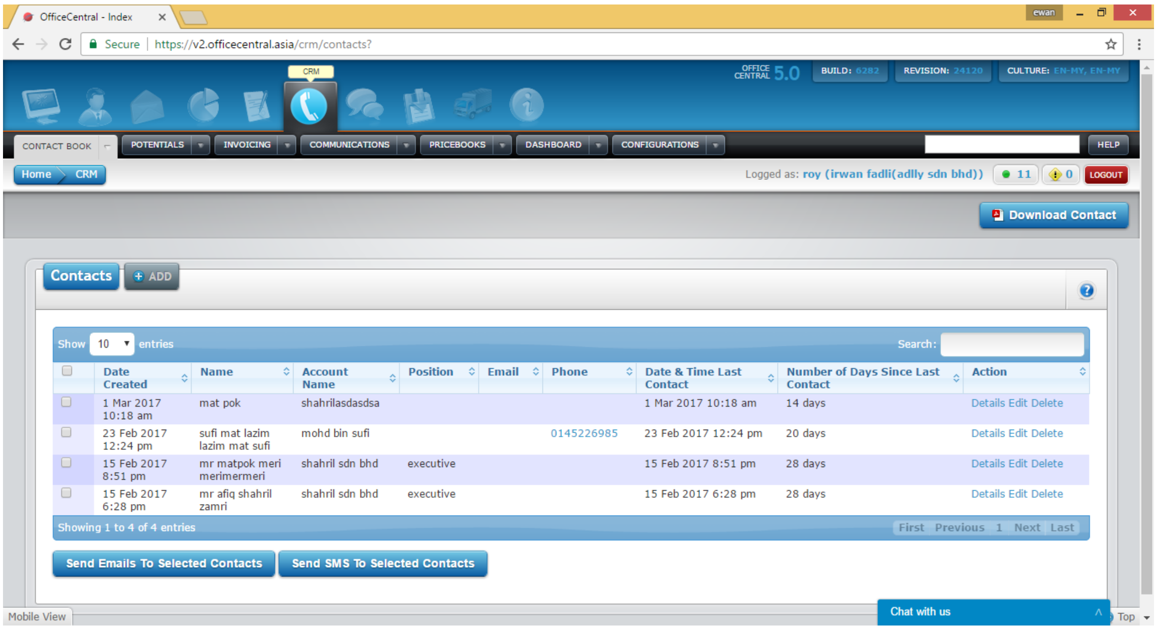
1. You can see the following picture after click on ***'CONTACT'*** button.



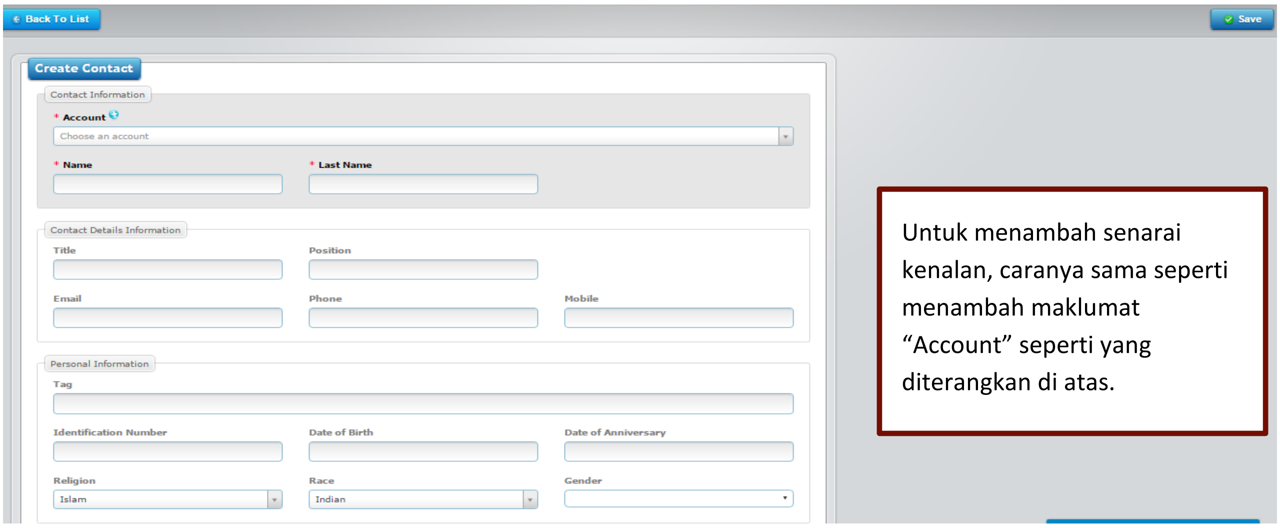
Description:

A	Click on this button to add ***"CONTACT"*** information.
B	Click on this button to erase any unused information.
C	Click on this button to view further details.
D	Click on this button to edit ***"CONTACT"*** information.

2. When you choose ***"VIEW LIST"*** in ***"CONTACTS",*** you can view you ***"CONTACTS"*** list.



Click ***"ADD"*** to add your list of ***"CONTACTS".***

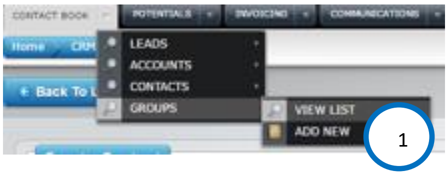


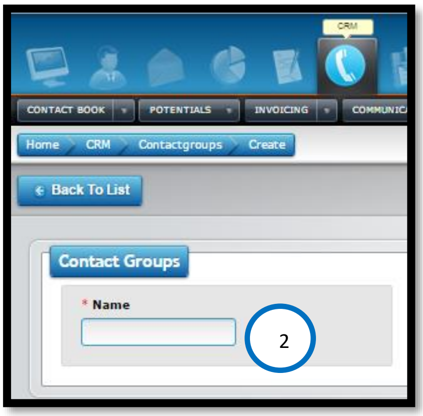
Untuk menambah senarai kenalan, caranya sama seperti menambah maklumat "Account" seperti yang diterangkan di atas.

1.3.4 GROUPS

"GROUPS" is used to create group base on need. As an example, you have a huge number of customers, you can group them according to states or your business branch.

1. Go to ***"CONTACT BOOK"*** and select **"GROUPS"** then click "***ADD NEW".***





Description:

1	Click this button to add new group.
2	Please enter relevant group name.

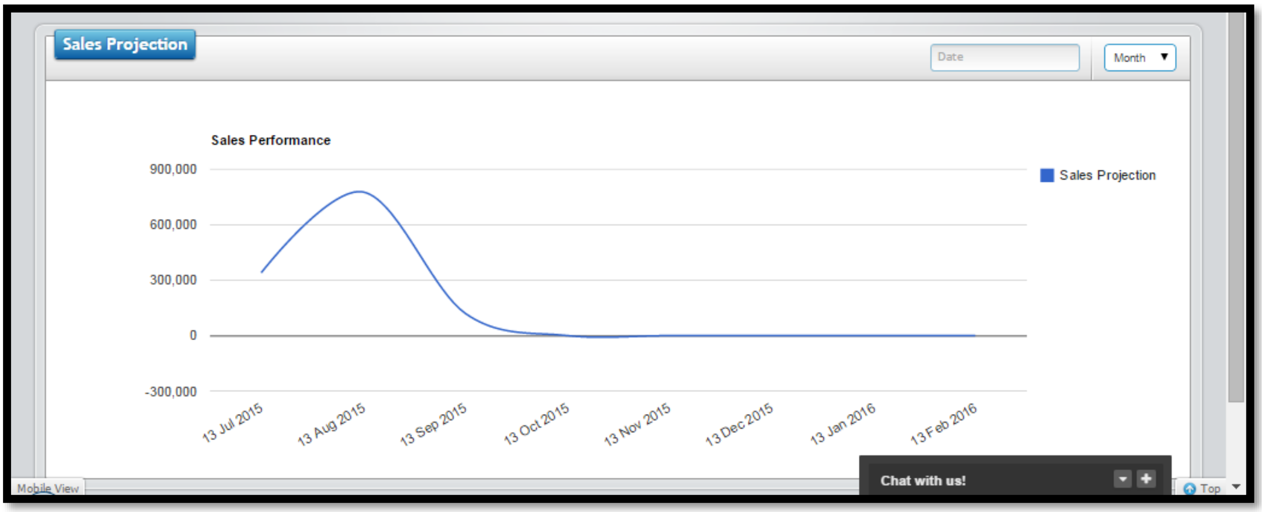
1.4 POTENTIALS

"POTENTIALS" is list of potential projects or sales for your company. Example: Tender.

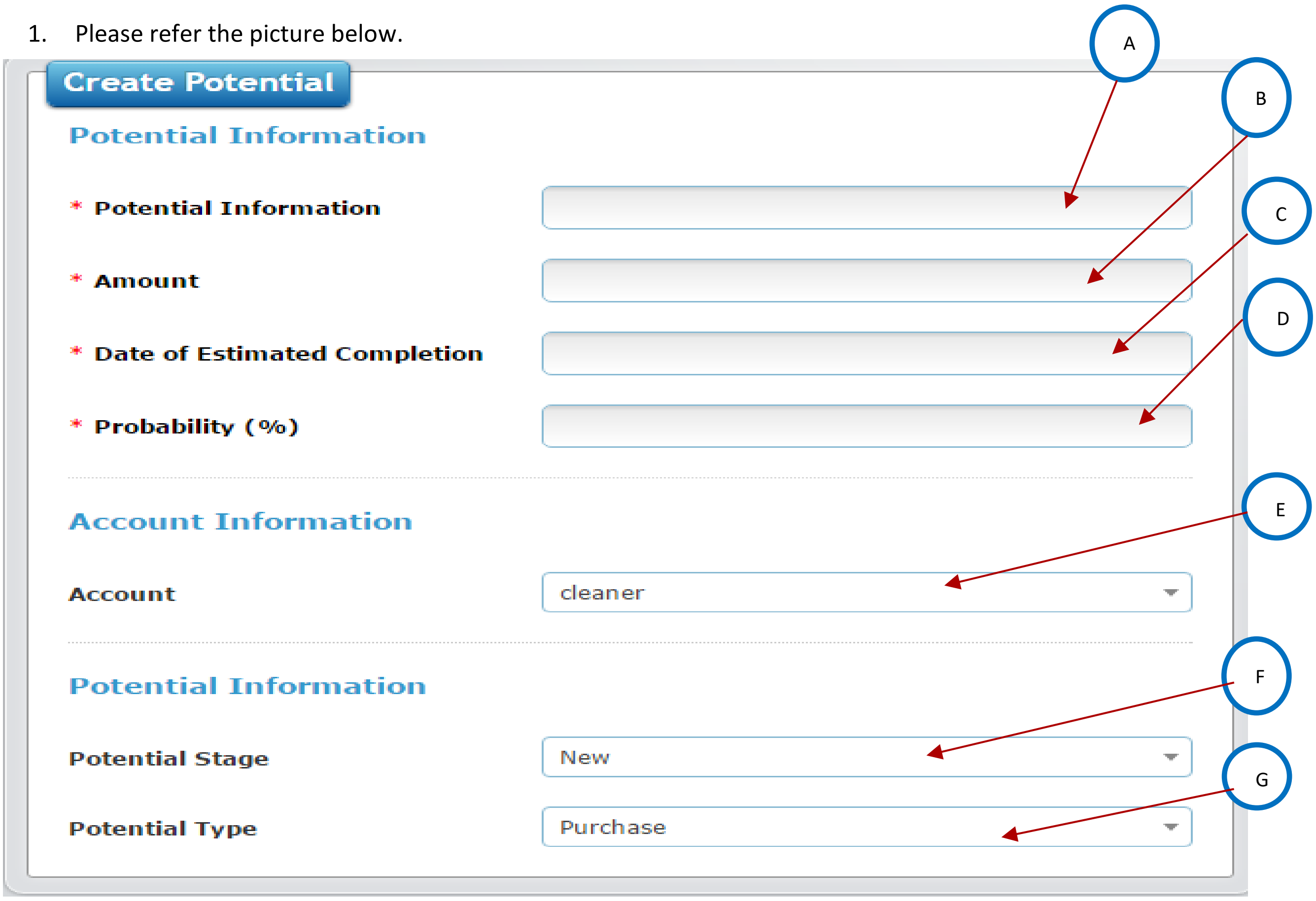
1. You can view your company's potential sales by selecting ***"SALES PROJECTION"*** as per (A).

2. When you choose ***"SALES PROJECTION",*** you can view your company's potential sales graph as per the example below:

You can click on "***POTENTIALS***" button and click on "***ADD NEW***" to make a list of potential sales like in (b) or new "***POTENTIALS***" project. Fill in all related information in the blanks provided. When you are done filling in all related information, you must click on the "***SAVE***" button.



1. Please refer the picture below.



Description:

A	Please enter ***"POTENTIAL"*** name whether it is a project, tender or sales.
B	Please enter amount obtained.
C	Please enter project estimated date of completion.
D	Key in probability percentage of company acquiring the project.
E	Please select related account information.
F	Please select ***"POTENTIAL"*** stage.
G	Please select ***"POTENTIAL"*** type involved.

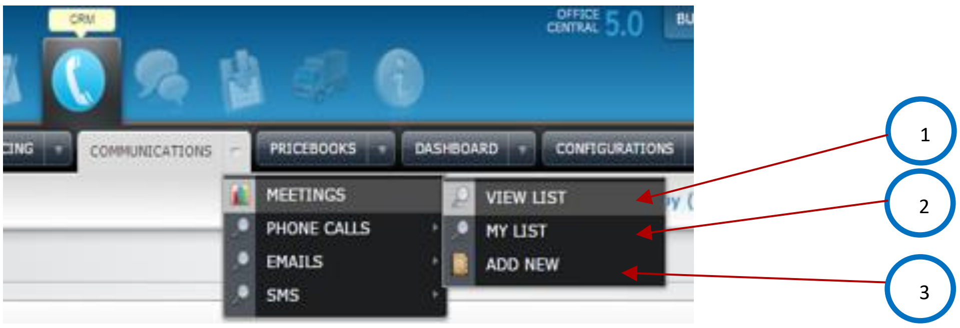
1.5 COMMUNICATIONS

In "***COMMUNICATIONS***" module, you can record all meeting activities and and phone calls with those listed in "***CONTACT***". "***COMMUNICATIONS***" will automatically be included with "***ACCOUNTS***", therefore you have to ensure that all communications are correctly recorded. This is for the purpose to make summary for your company. You can find out what needs to be improved or which account needs to be followed.

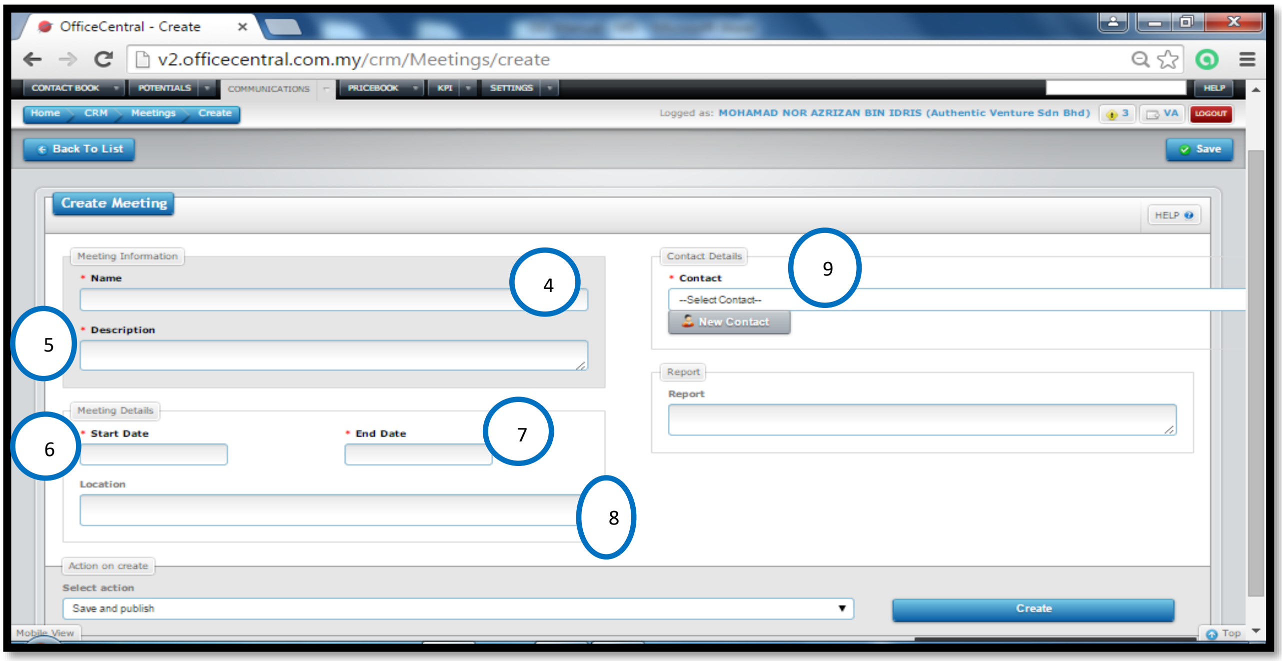
1.5.1 MEETINGS

"MEETING" allows a company to record every meeting in the future.

1. Select ***"MEETINGS"*** under ***"COMMUNICATION"*** and click on ***"VIEW LIST"*** as per (1).
2. You can view list of ***'MEETINGS'*** related to you by clicking on ***'MY LIST'*** as in (2).
3. You can add list of ***"MEETINGS"*** by clicking ***"ADD"*** as per (3).



4. Fill in the required space to add.



Description:

1	Please go to ***"MEETING"*** link and select ***"VIEW LIST"*** to view list of available ***"MEETING".*** For example: meeting with TNB.
2	Click to view list of ***'MEETINGS'*** related to you.
3	Click on ***"ADD"*** to add list of ***"MEETING"***.
4	Please enter ***"MEETING"*** name. For instance; meeting with TNB.
5	Enter description of the ***"MEETING".***
6	Select ***"MEETING"*** start date.
7	Select ***"MEETING"*** end date.
8	Please state location of the ***"MEETING".***
9	Please select the relevant ***"CONTACT".*** In this section, only acquaintance added in ***"CONTACT"*** will appear.

<u>Additional notes:</u>

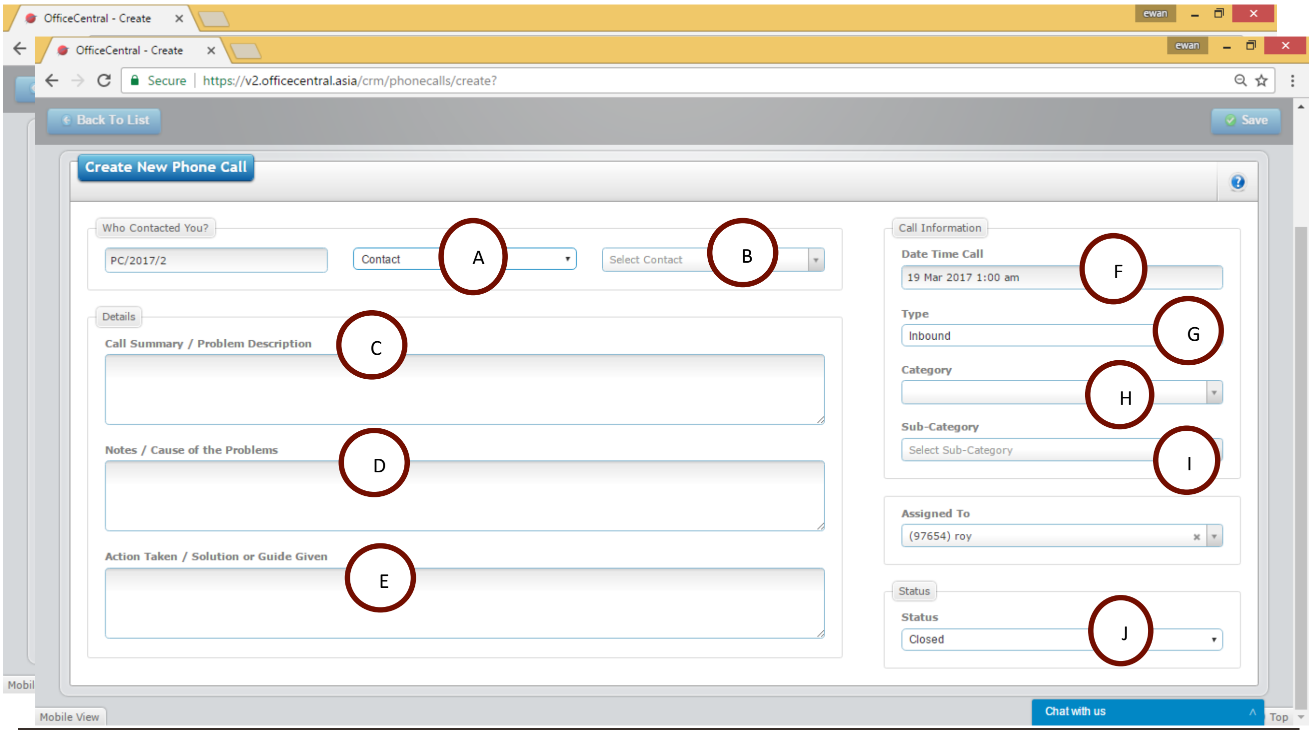
Before filling in the information in "***MEETING***", you must enter your customers' name in ***"CONTACT BOOK"*** first. When you are done filling in the information in ***"CONTACT BOOK***", fill in the information then click on **"CREATE"** or **"SAVE".**

For your information, once you've done filling in the information in "***MEETING***", automatically all movement will be shown in "***MOVEMENT***" in the HRM module.

1.5.2 PHONE CALL

1. Click on **"COMMUNICATIONS"**, select **"PHONE CALL"** then click ***" VIEW LIST"*** to view the overall list of phone calls. Click on ***'MY LIST'*** to view ***'PHONE CALLS'*** list for yourself.

2. To add, click ***" ADD".***

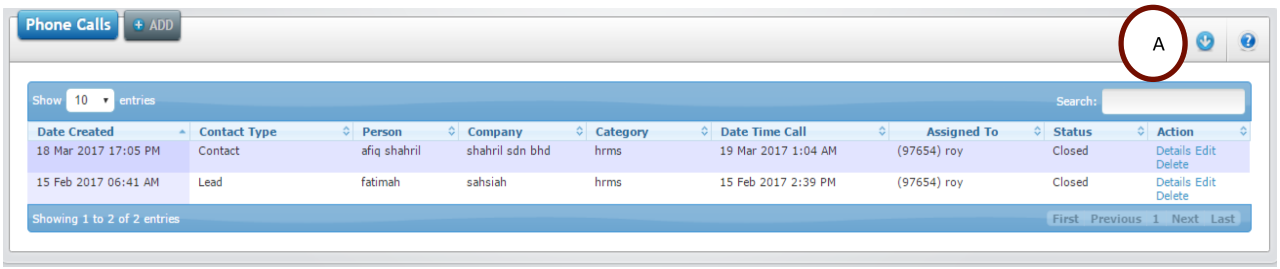


Description:

A	Select your contact/prospect.
B	Key in the company's name of your contact/prospect's.
C	Please key in description of the call/problem.
D	Please state cause of the problem.
E	Please state the action taken.
F	Please select the date and time of the call.
G	Please state purpose of the call. You may select "inbound" or "outbound". "Inbound" means call in while "outbound" is call out.
H	Please select category of the call.
I	Please state the sub-category of the call.
J	Please state call status whether the issue is closed or requires follow up.

***When done, the last date contact was made with customer will also be updated automatically by the system. Don't forget to click the save button for your call to be saved by the system.**

3. Download list of all calls made by clicking on (A).

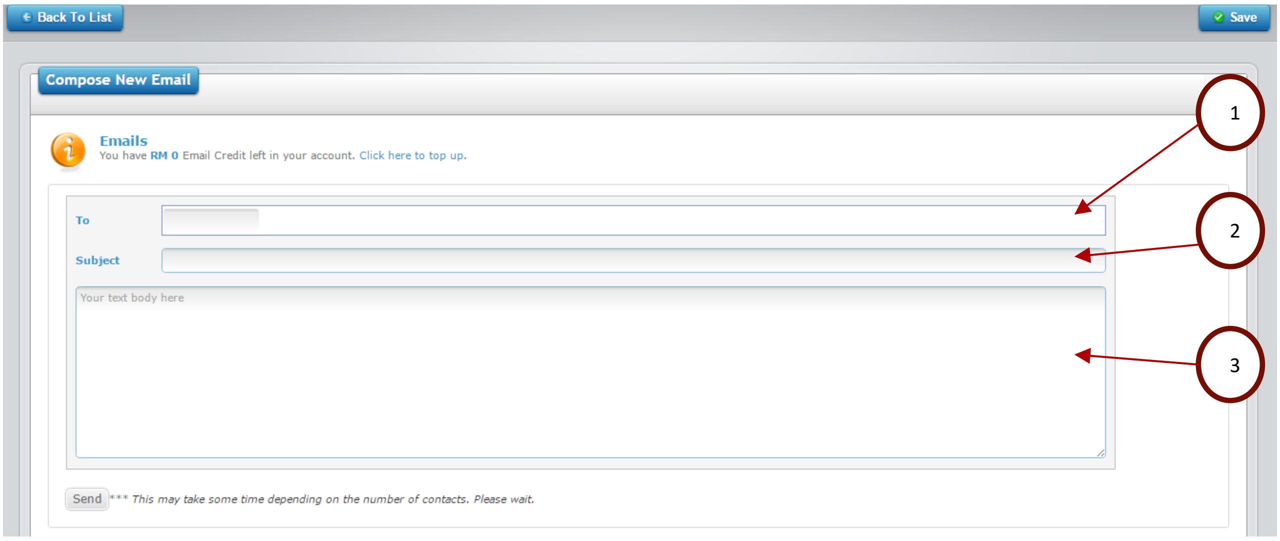


To download all call, you can click on (A) as per the above picture.

1.5.3 Emails

1. You can send email to your "***CONTACT***" or ***'LEADS'***. To use this system, you will first need to add credits to OfficeCentral as this email will be charged. You can click on ***"VIEW LIST"*** to view list of emails sent, you can also click on ***"COMPOSE IND"*** to create new email. First, you will see display as follow:

2. If you are creating new email, you can click on ***"COMPOSE IND".*** Then you will see the following display.



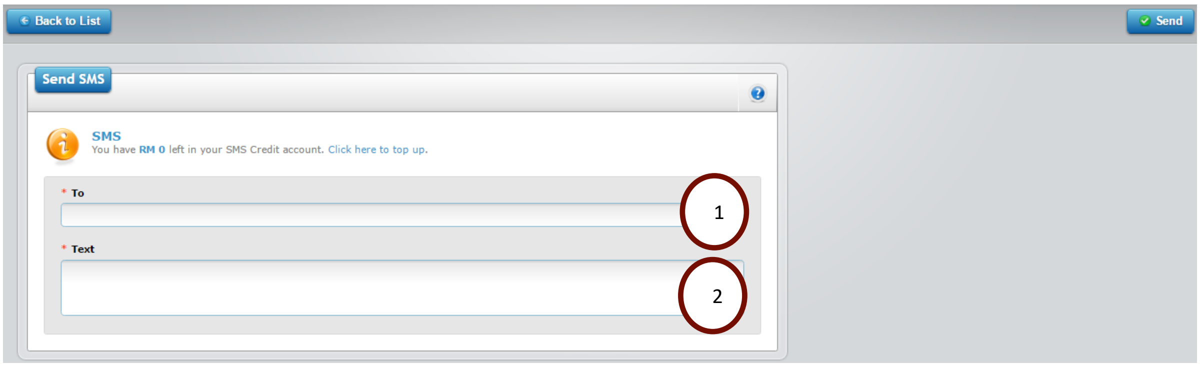
1	Enter recipients' email which consist of ***"LEAD", "ACCOUNT" DAN "CONTACT".*** You can also send an email to many recipients.
2	Enter title of your email.
3	Enter your email content to be sent to recipient.

***click on save button after creating new email.**

1.5.4 SMS

1. You could also send sms to your lead, account and contact. This sms service will be charged the same as email. You need to have credit prior to sending sms to recipient.

2. Click on ***"VIEW LIST"*** to view list of SMS sent to recipient. Click on ***"COMPOSE IND"*** to send to sms. You will see the following display if you click on ***"COMPOSE IND".***



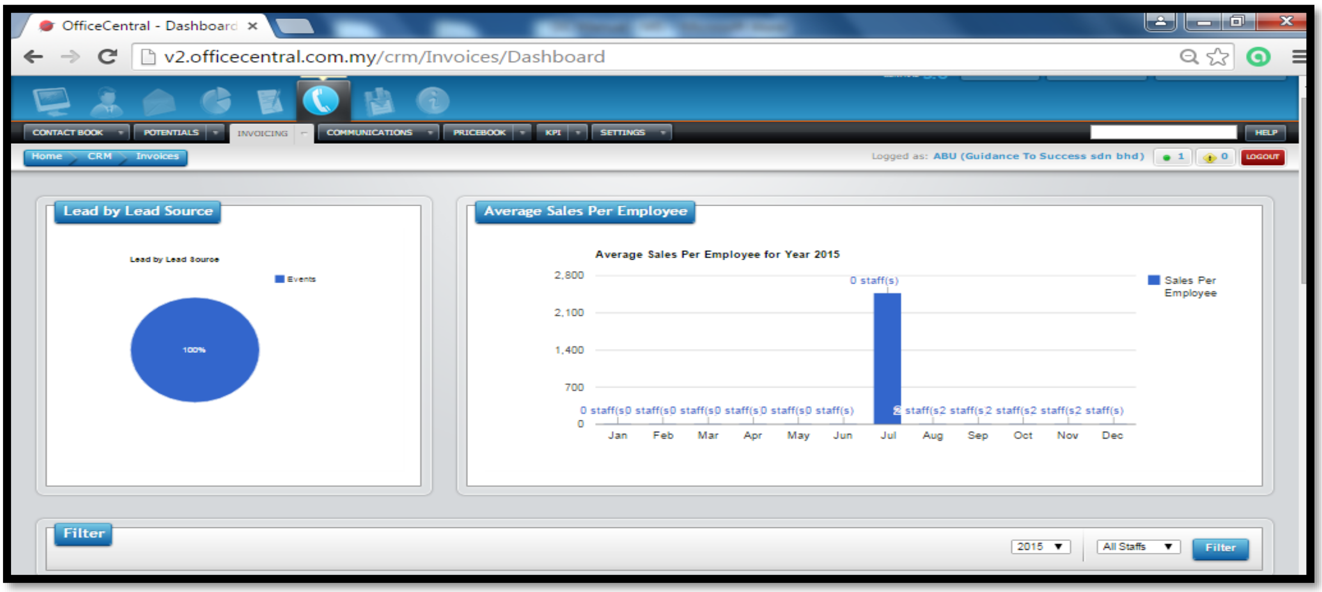
1	Enter your recipient's number.
2	Type in the SMS content.

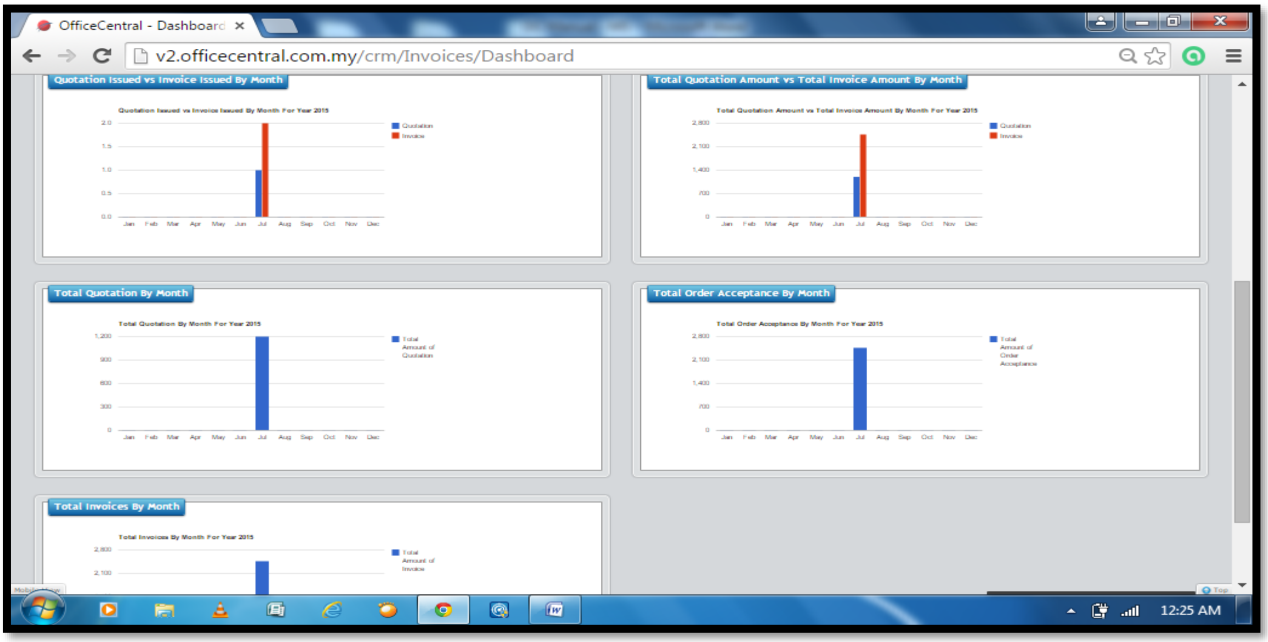
1.6 INVOICING

In invoicing sub-module, you can create quotation, order acceptance, delivery order, invoices and receipt. You will use it when there is a buyer who wants to buy your product.

1.6.1 DASHBOARDS

Dashboards in invoicing allows user to view company's overall operation.

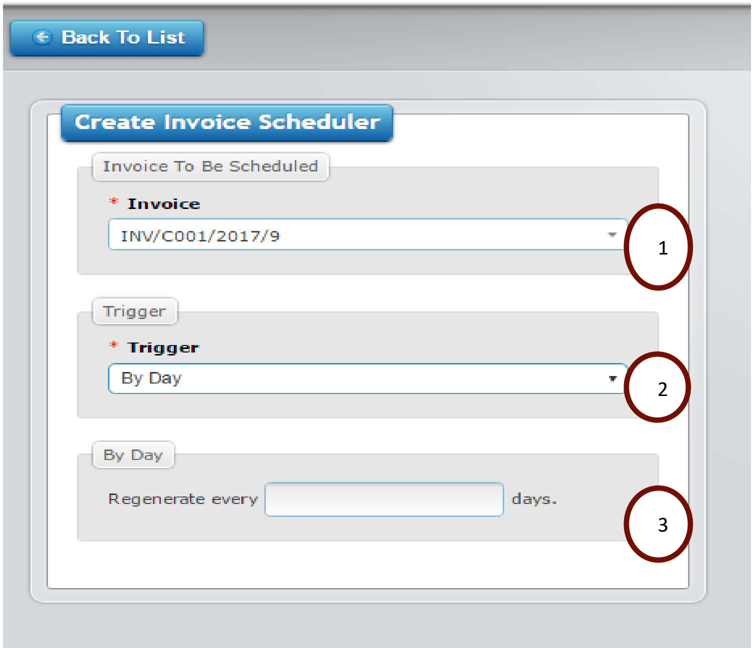




1.6.2 Invoices Scheduler

Our system is equipped with invoices scheduler which intent to ease customers by not having to create the same invoice everyday, every week, every month or every year. You can select invoices which you have created to make it repeatedly whether daily, weekly, monthly or even yearly.

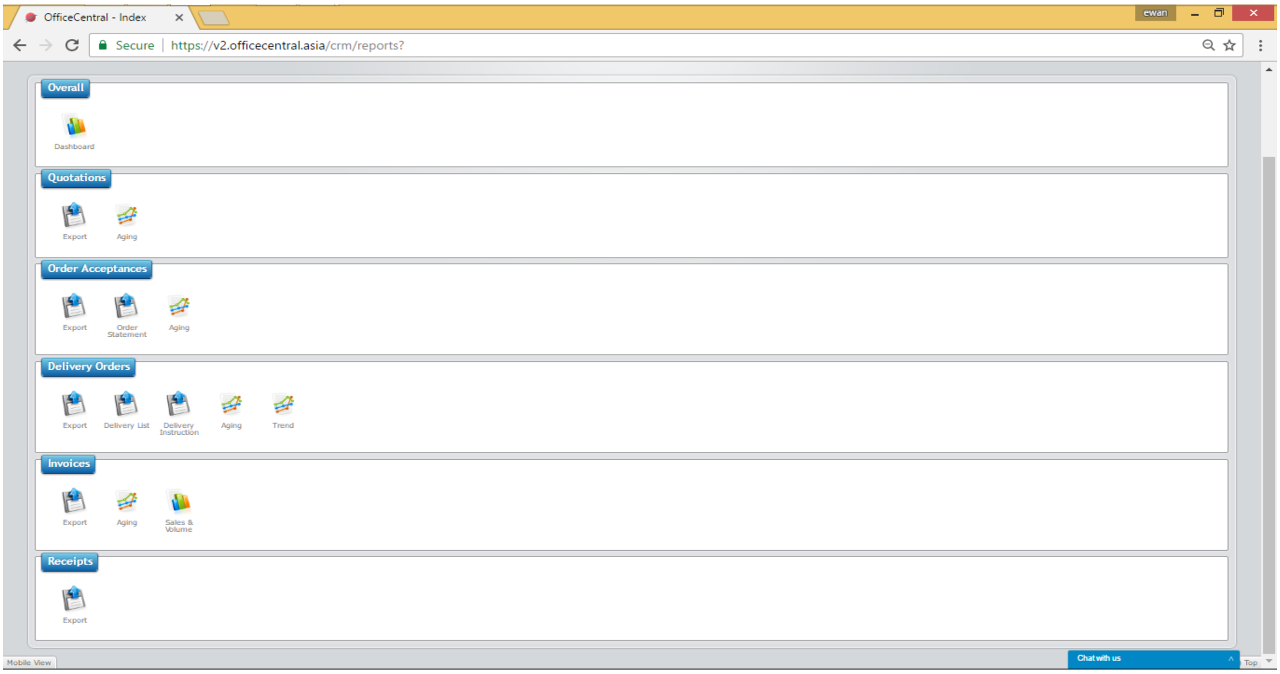
1. The above display will be shown when you click on ***"INVOICES SCHEDULER".*** Click on ***"VIEW LIST"*** to view the invoices schedule which you have created. Click on ***"ADD NEW"*** to add new invoice schedule.
2. Below is the display to add new invoice schedule.



1	Select invoice which you have generated to become your invoice schedule.
2	Select schedule either daily, monthly or yearly.
3	Select number of days required to regenerate the invoice.

1.6.3 Reports

Here you can view the overall report for quotation, order acceptance, delivery order, invoice and receipt. You can view all reports here. Below is the display for ***"REPORTS".***

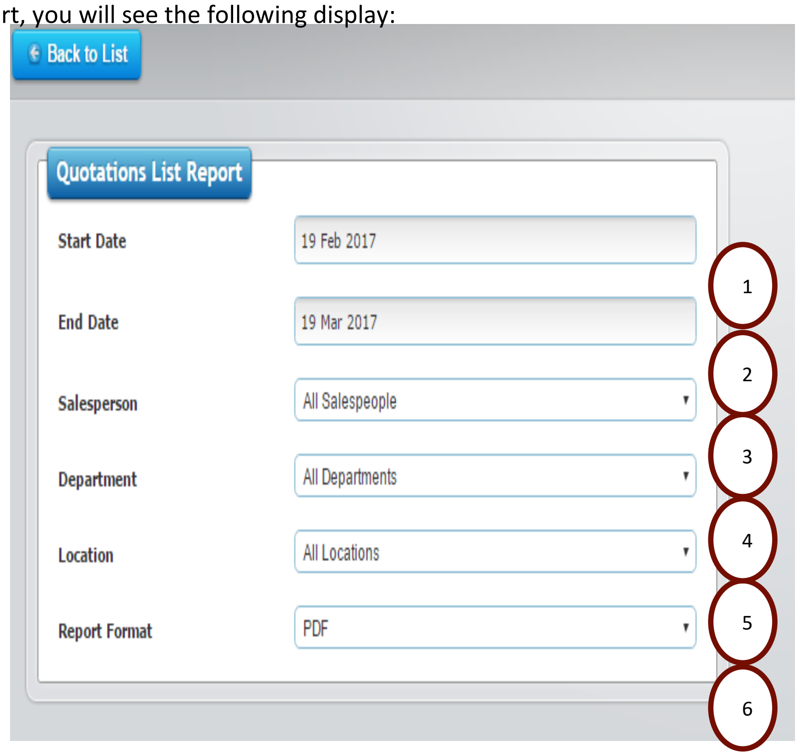


1.6.3.1 OVERALL

If you click on overall, you will return to ***"DASHBOARD".***

1.6.3.2 QUOTATION

If you click on export, you will see the following display:

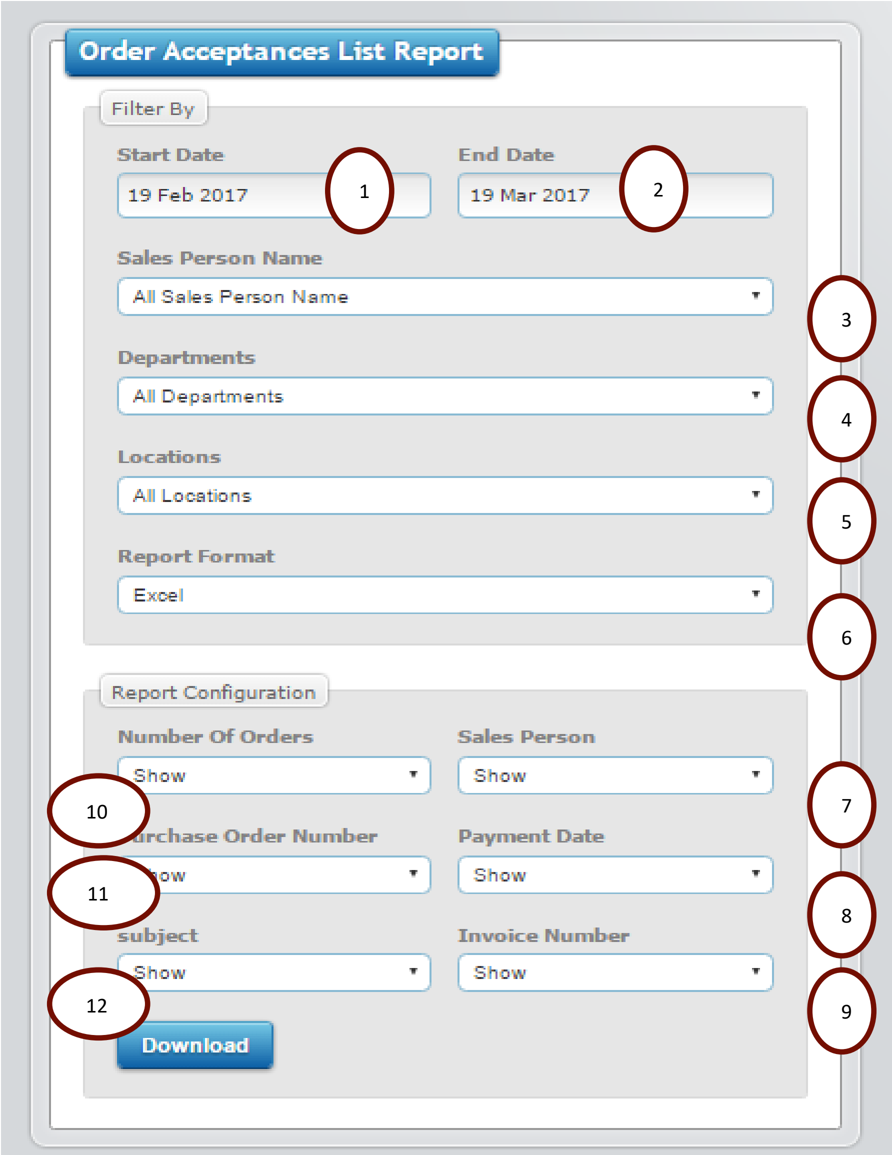


1	Key in the start date for you to view your quotation report.
2	Key in the end date.
3	State the salesperson which you would like to view.
4	State which department you would like to view.
5	State the location you would like to view.
6	Select the required report format.

1.6.3.3 ORDER ACCEPTANCE

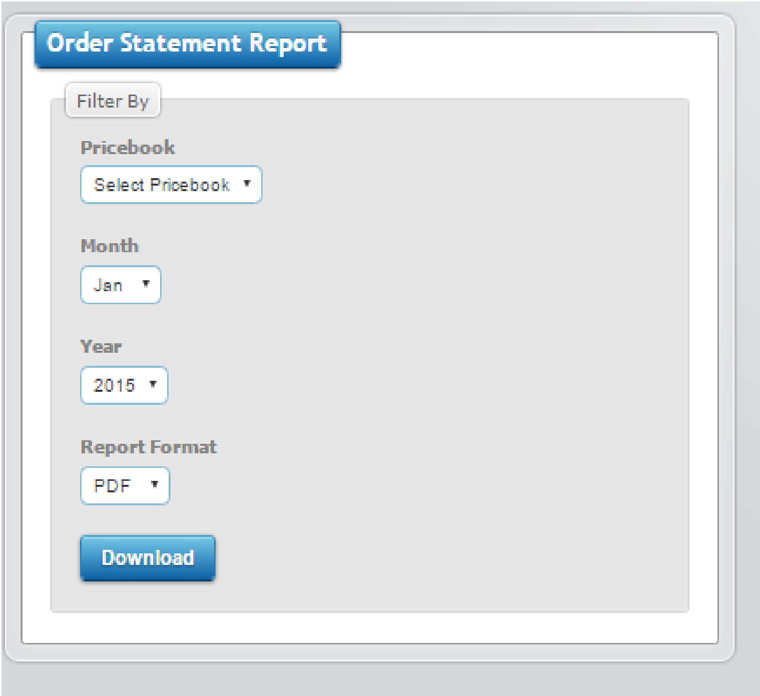
Here you can produce 3 types of report that are order acceptance report, order statement report and aging report.

1. Order acceptance report. Below is the display to generate the report.



1	State report start date.
2	State report end date.
3	State the same of salesperson involved.
4	State the relevant department.
5	State the relevant location.
6	Select report format.
7	Select whether you need staff's name to be displayed.
8	Select if you would like date to be displayed.
9	Select if you would like invoice number to be displayed.
10	Select if you would like to show the order amount.
11	Select if you would like to show the purchase number.
12	Select if you would like to show order info.

2. If you click on order statement, you will see the following display:



You can select report for each of your product. Select the required product, then click on download button to generate the report.

3. You could also view aging order acceptance by clicking on ***"AGING"*** button.

1.6.3.4 DELIVERY ORDER

In ***"DELIVERY ORDER***" you can view 5 report as per the following pictures.

1. To ***"EXPORT"*** delivery order, you can follow the same steps as ***"ORDER ACCEPTANCE".***
2. To produce reports on delivery list and delivery instruction, you have not rights to view.
3. You can view your delivery order through map. You can click on button ***"TRENDS".***

1.6.3.5 INVOICES

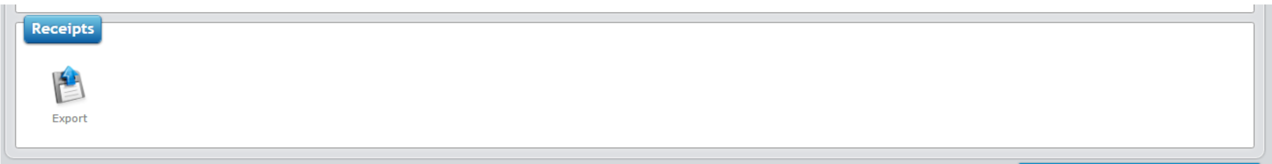
You can view the following display to generate report on invoices.

1. To ***"EXPORT"*** invoices, you can follow the same steps as ***"ORDER ACCEPTANCE".***
2. To view report of aging invoices, you can click on ***"AGING"*** button.
3. You can view the number of invoices and their amount by clicking on ***"SALES & VOLUME"*** button.

You can select the start and end date of your report. Just key in the start and end date then click on the filter button.

1.6.3.6 RECEIPTS

You can view report on receipt issued by your company to customer. Below is the display on list of reports that can be generated.

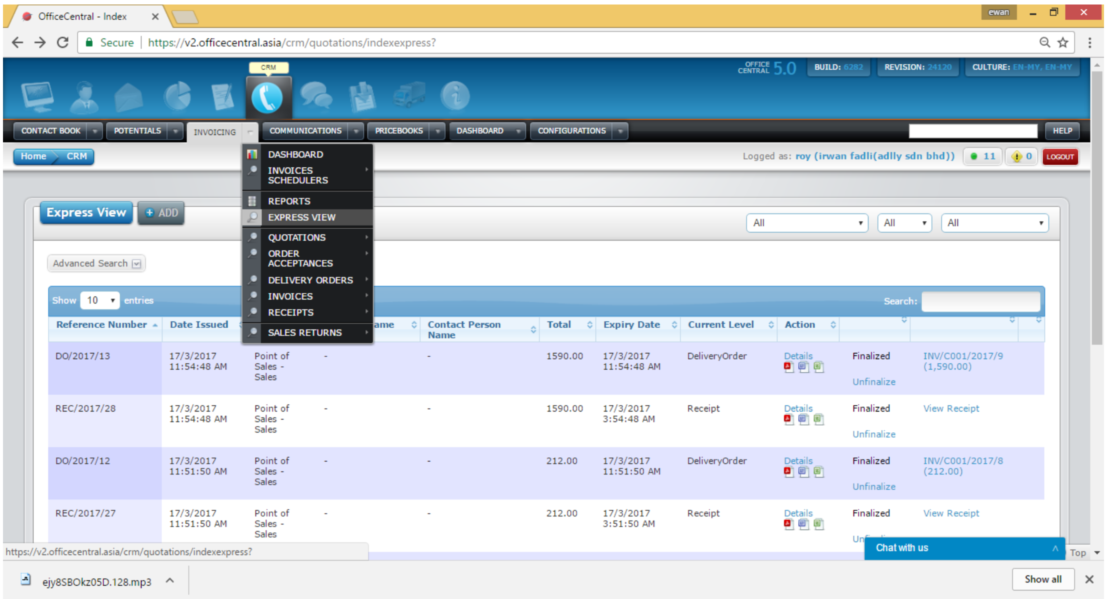


The steps are the same as producing report for ***"ORDER ACCEPTANCE".***

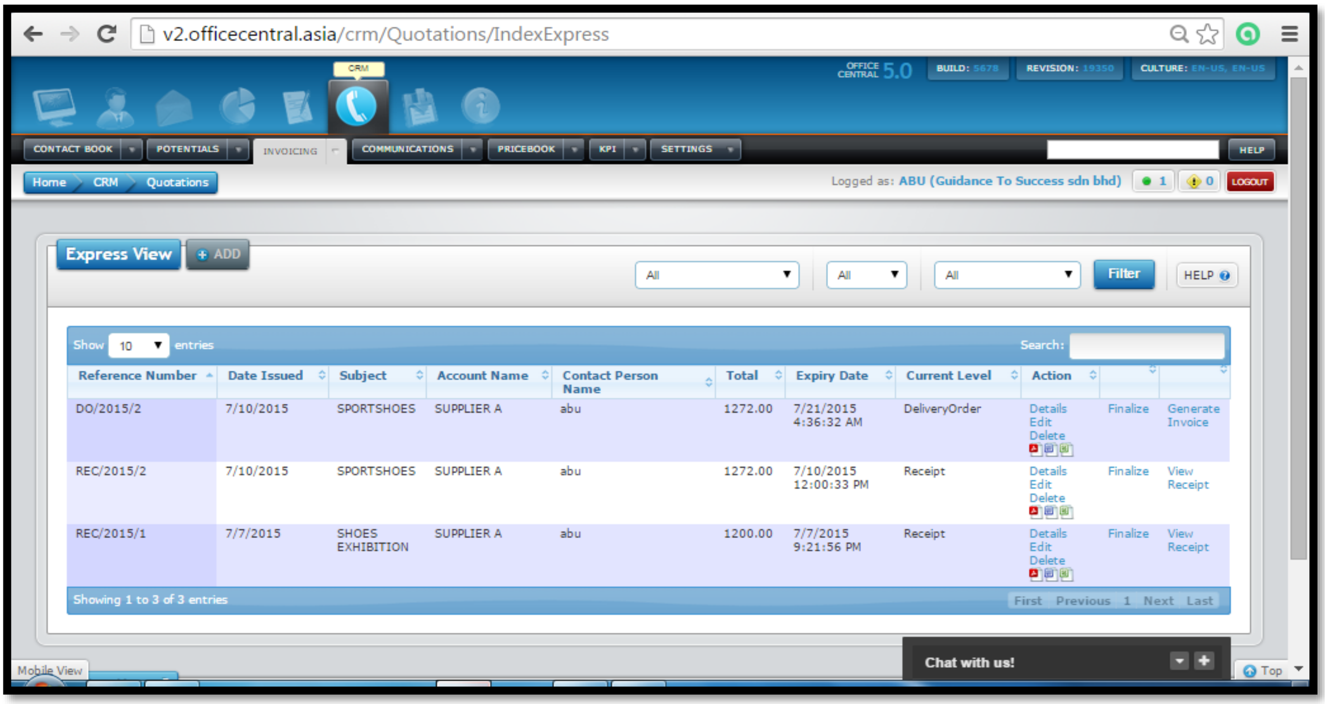
1.6.4 EXPRESS VIEW

"EXPRESS VIEW" allows you to view the process for all transactions done by your company whether "QUOTATION", "ORDER ACCEPTANCE", etc.

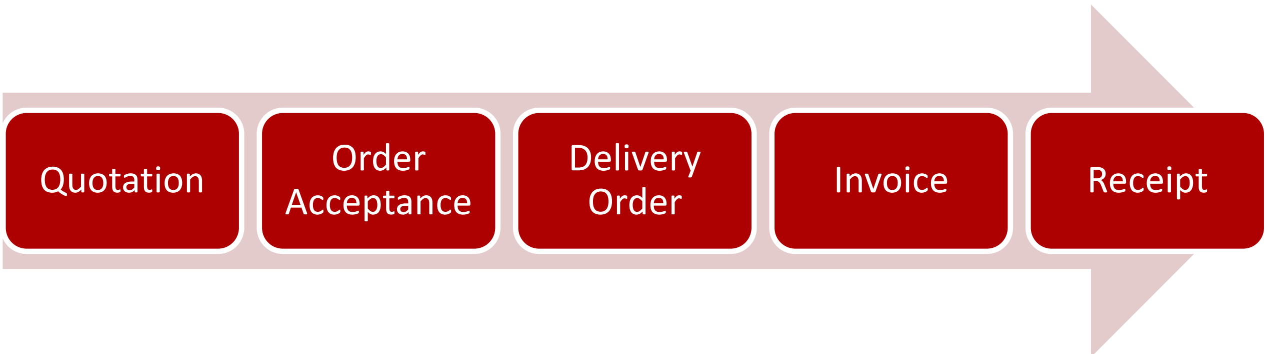
1. Click on ***"INVOICING"*** and select ***"EXPRESS VIEW".***



2. You will see the list of transactions when clicking on the "**EXPRESS VIEW**" button.

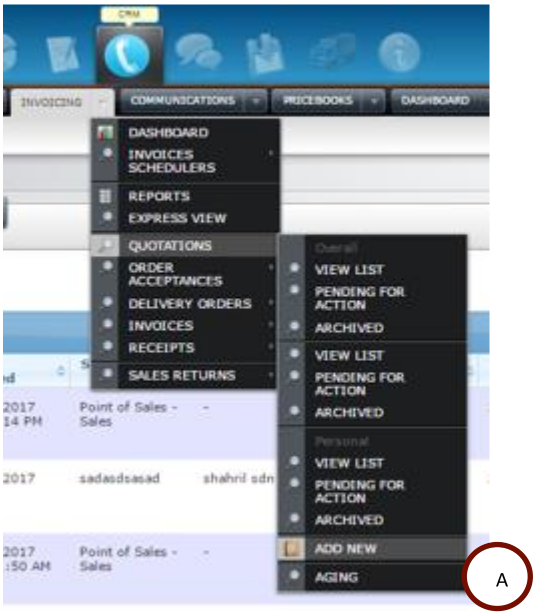


INVOICE PROCESS FLOW



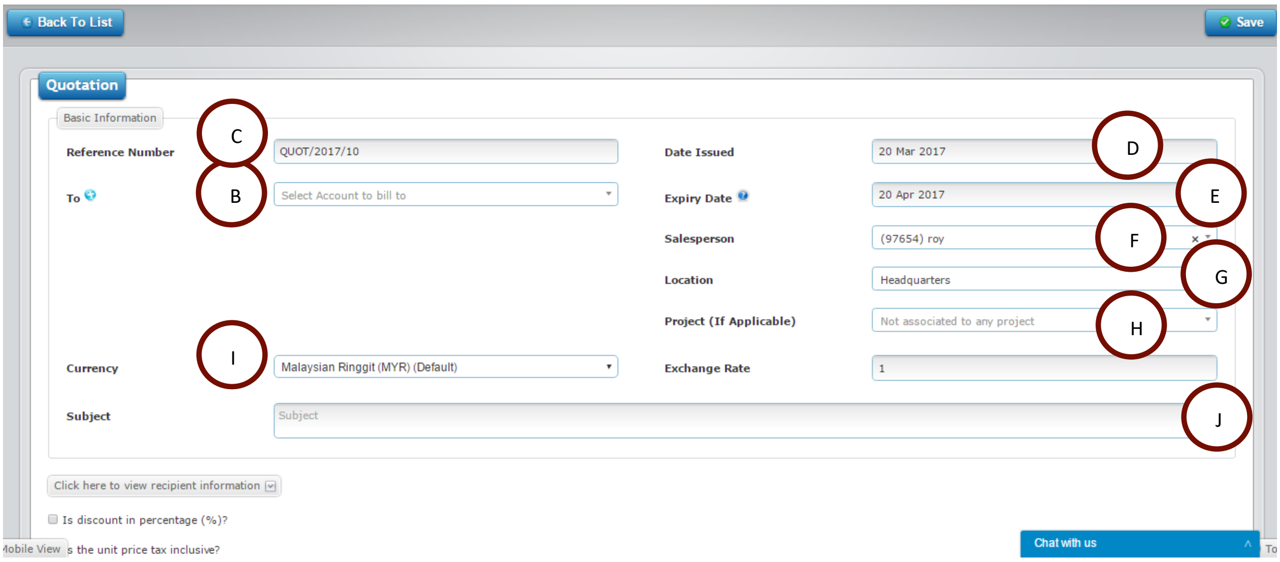
1.6.5 QUOTATIONS

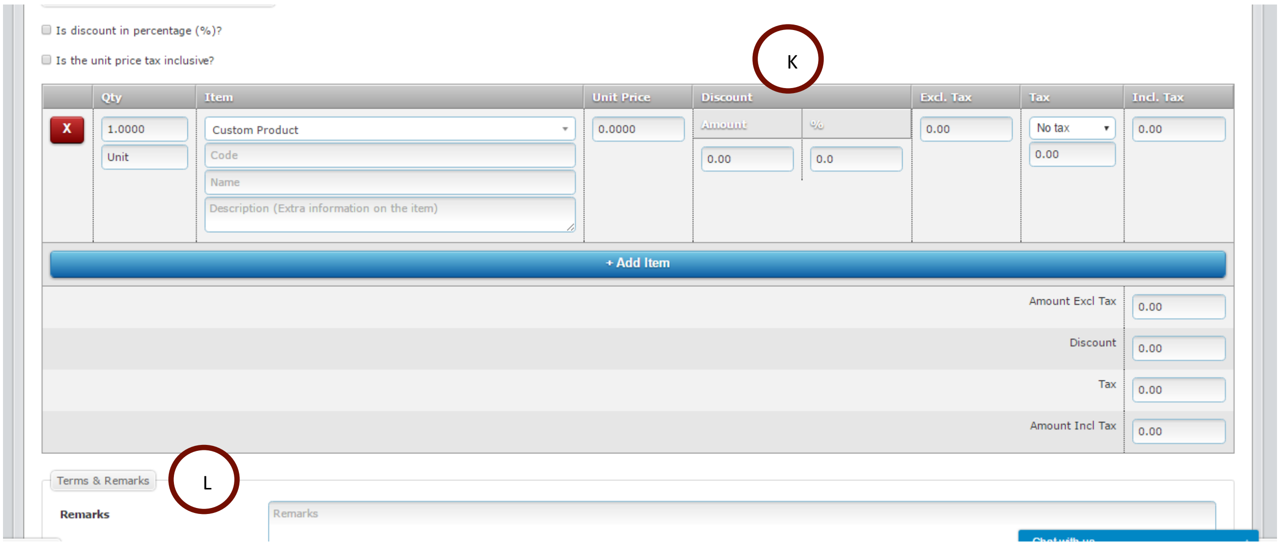
1. ***"QUOTATIONS"*** is a document which you submit to your potential customer to give the price of your product. It is also known ad quotation.
2. Click on ***"INVOICING"***, choose ***"QUOTATIONS"*** and click ***"ADD NEW"*** as in (A).



3. Fill in other areas as required. You can add details of the item in the quotation and click ***"Save"*** after filling in details as required.

Example:

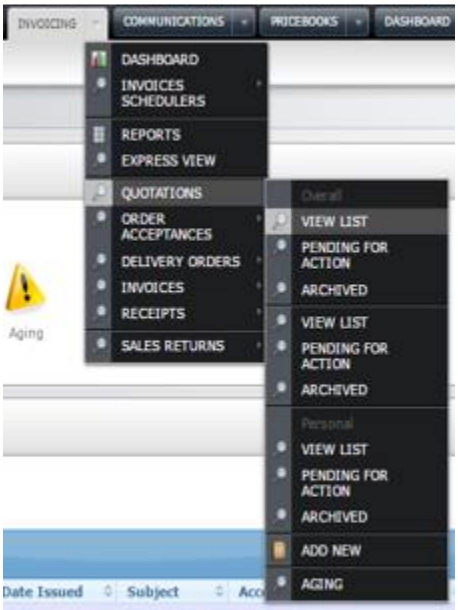




Description:

A	Click on ***"ADD NEW"*** button to add quotation information.
B	Please select "***ACCOUNT***". Please be reminded that only saved "***ACCOUNT***" will be displayed. If you have a new "***ACCOUNT***", you need to add it in ***"CONTACT BOOK"*** and choose "***ACCOUNT***".
C	This is the reference number for quotation. System will issue a reference number according to sequence. You can also change the reference number.
D	Please select the date quotation is issued.
E	Please select expiry date of the quotation.
F	To add list of salesperson, please go to HRMS module, select ***"ADD STAFF"***.
G	State the location of your company.
H	State project name if ***"QUOTATION"*** it is related to your company's project.
I	Select the currency used.
J	Please state subject of the quotation.
K	Please fill in all space provided for quotation item.
L	Please state note of any information you would like to convey to customer in the quotation receipt.

4. When you have saved the quotation which you have prepared, you can click on the ***"VIEW LIST"*** button. Below is the display to view the list of ***"QUOTATION".***



5. When you click on the ***"VIEW LIST"*** button, you will see the following display.

Details : To view quotation display.

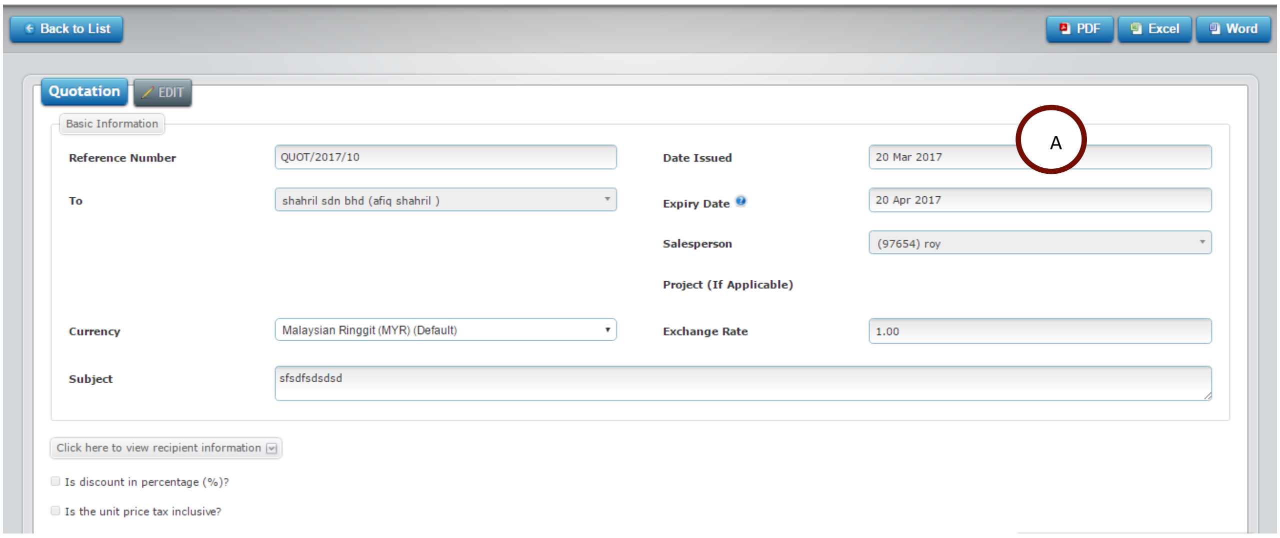
Edit : To edit quotation information and item.

Delete : To delete quotation.

Finalize : To finalize quotation, which mean this quotation can no longer be edited.

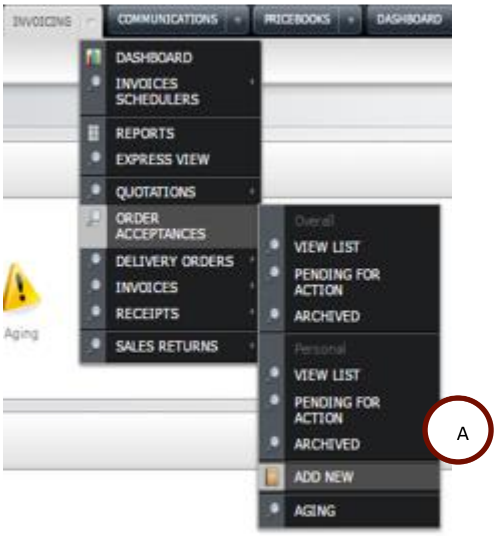
Generate Order Acceptance : To generate Order Acceptance automatically based on the quotation.

AWhen quotation has been created, you can view details of the quotation by clicking on “***DETAILS”*** in “***QUOTATION***”as per the picture below. You can click on ***“EDIT”*** to amend ***“QUOTATION”.*** You can print the quotation by clicking on “A”.

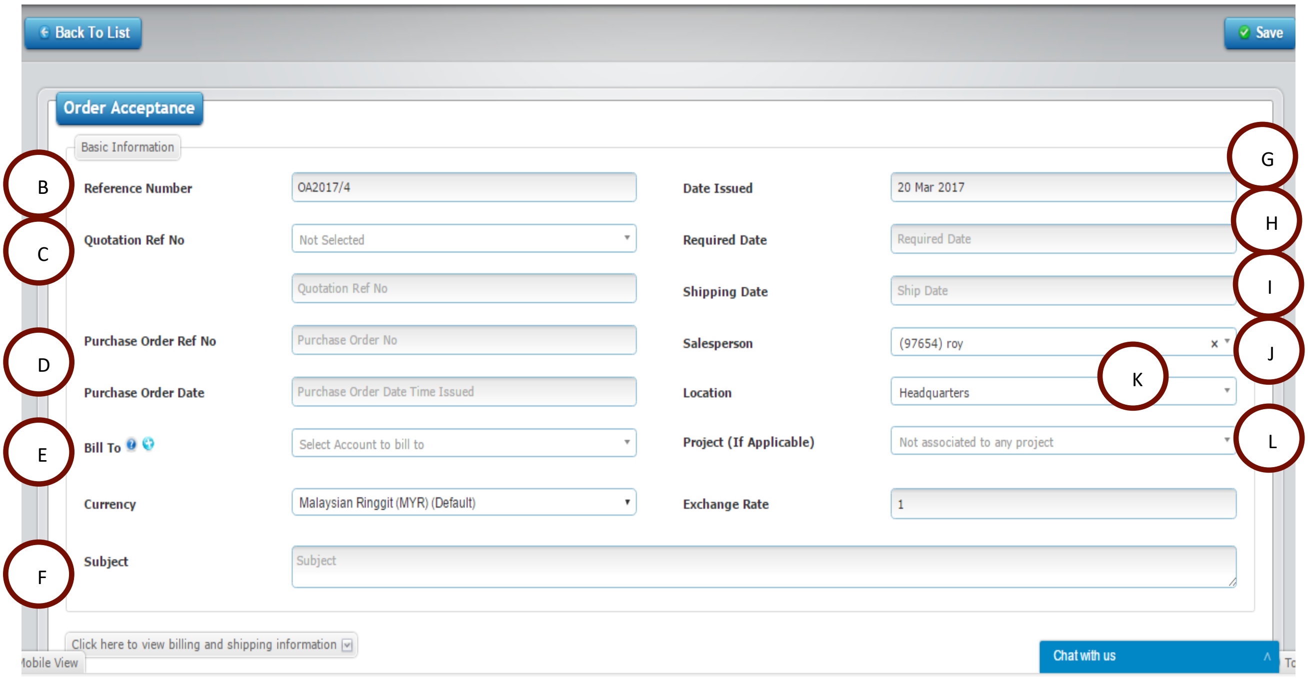


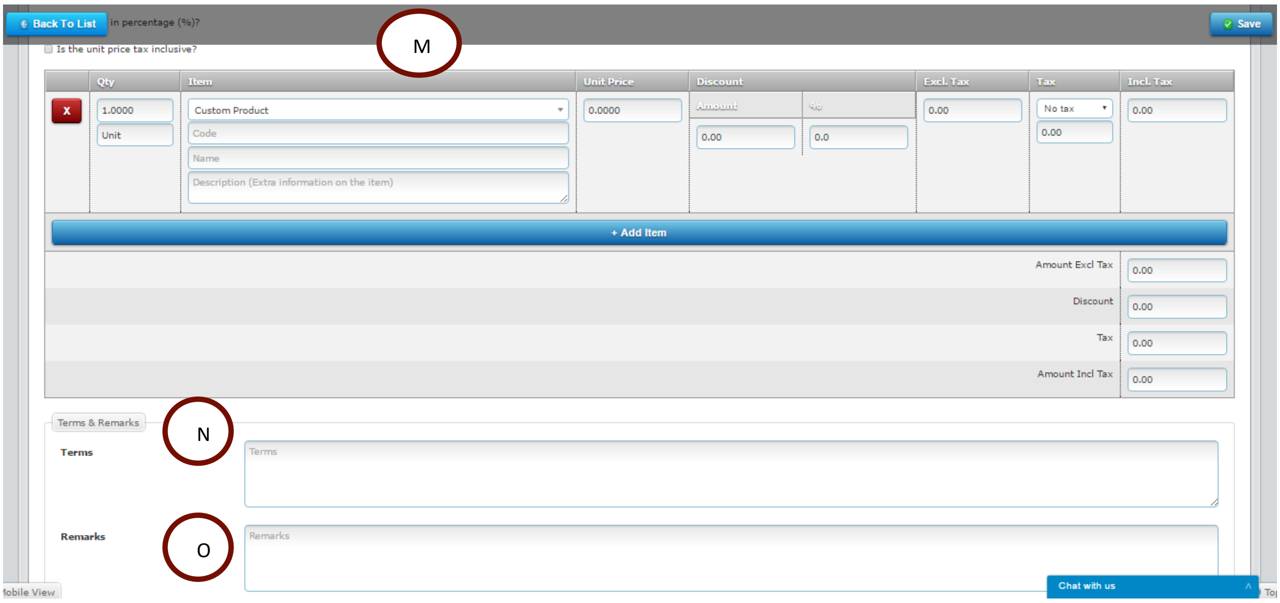
1.6.6 ORDER ACCEPTANCES

1. ***“ORDER ACCEPTANCE***” is the same as purchase order ***“PURCHASE ORDER”*** where customer can register on “***ORDER ACCEPTANCE***” to show that they have agreed with the quotation submitted and would like to make an order. You can add “***ORDER ACCEPTANCE***” item details after clicking on the button ***"ADD NEW".***



2. When you’ve clicked on ***"ADD NEW"*** button, you will see the following display.



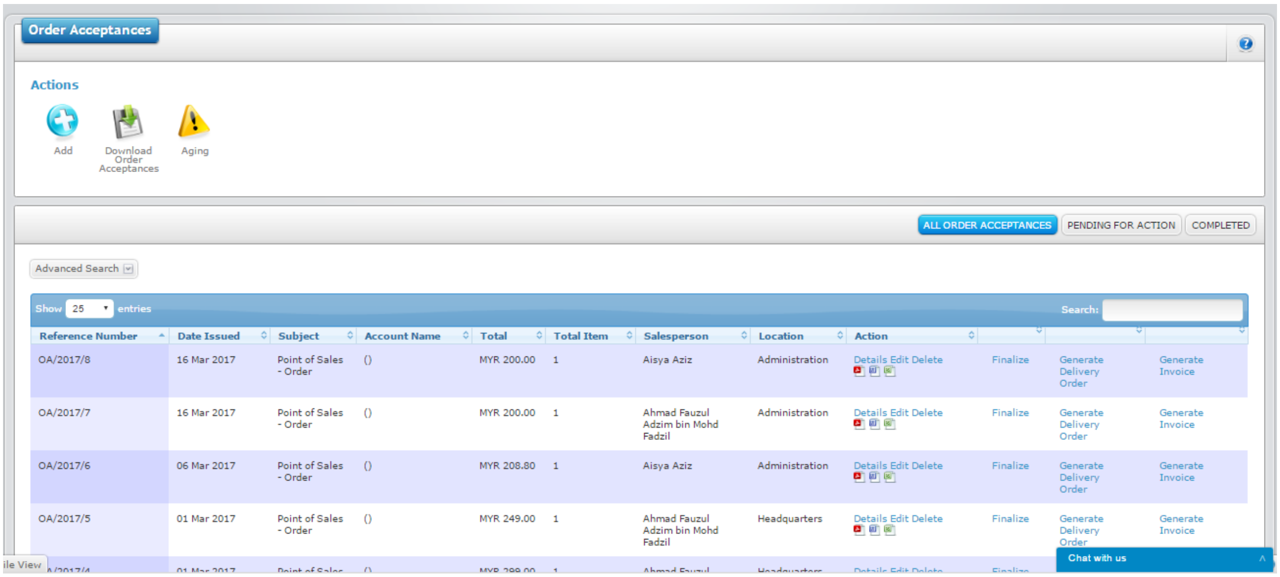


Description:

A	Tekan butang ini untuk menambah penerimaan pesanan. Click on this button to add order acceptance.
B	For this part, reference number will be automatically assigned base on sequence. You can amend accordingly to suitability.
C	You need to select the relevant ***"QUOTATION"*** reference number to create ***"ORDER ACCEPTANCE".***
D	Enter ***"PURCHACE ORDER"*** information if any.
E	Please enter ***"ACCOUNT"*** for this ***"ORDER ACCEPTANCE".***

F	Enter subject for the relevant order acceptance.
G	Enter issued date.
H	Enter required date.
I	Enter delivery date if any.
J	Select the salesperson involve in this ***"ORDER ACCEPTANCE".***
K	Select your company's location.
L	Select the related project.
M	For this part, please fill up the information related to order acceptance item.
N	Key in any terms related to this order acceptance.
O	Include notes for this order acceptance.

You can select ***"VIEW LIST"*** to view your ***"ORDER ACCEPTANCE"*** list.



3. Additional Information:

Details : To view *Order Acceptance* details.

Edit : To edit *Order Acceptance* information and item.

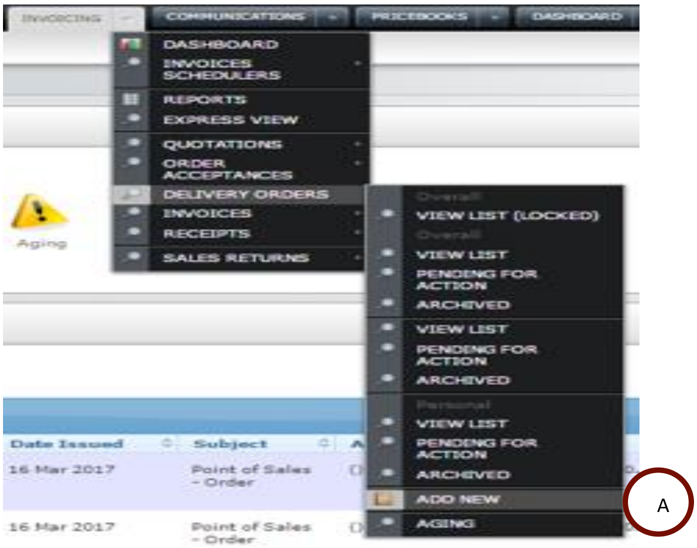
Delete : To delete *Order Acceptance.*

Finalize : To finalize Order Acceptance which mean that this *Order Acceptance* can no longer be amended.

Generate : To generate *Delivery Order* automatically based on information.

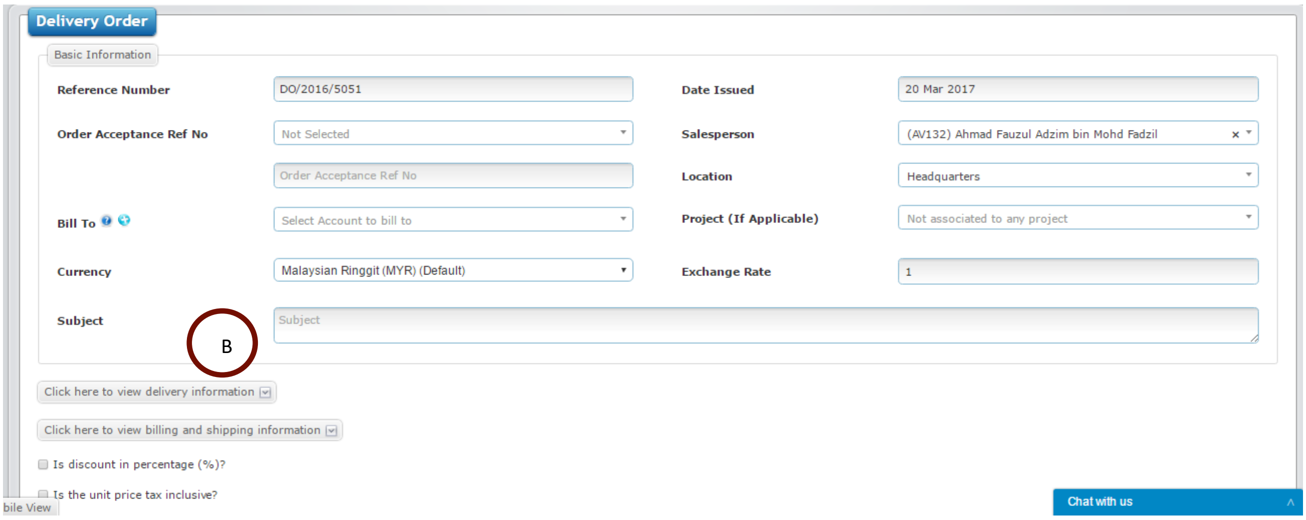
1.6.7 DELIVERY ORDER

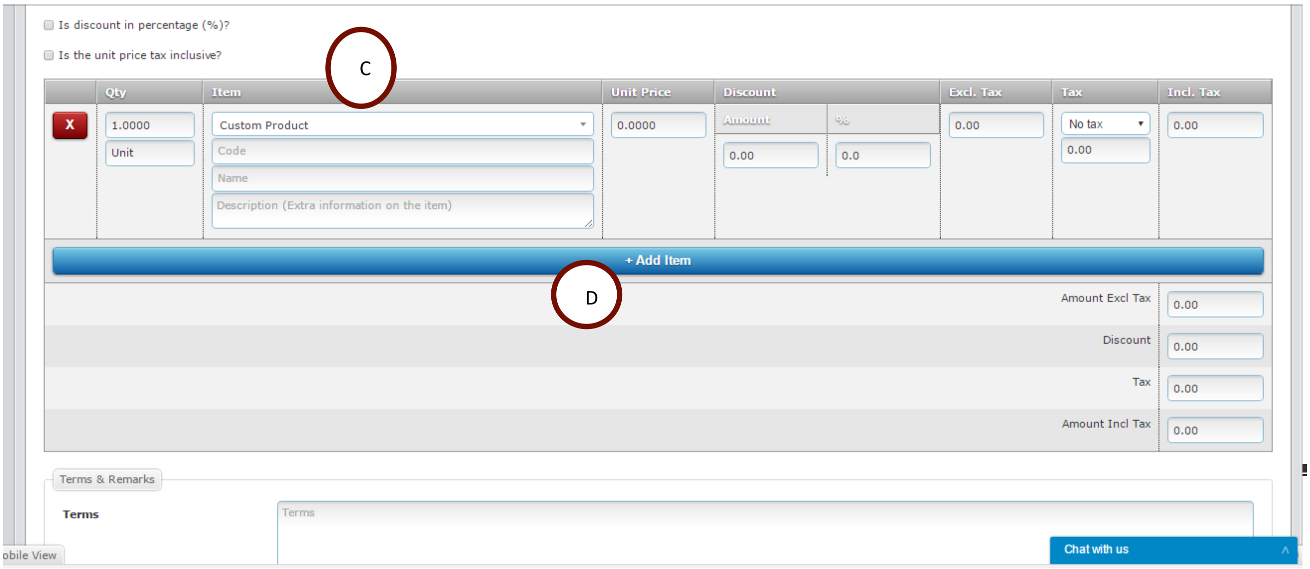
1. Click on ***"INVOICING"***, select ***"DELIVERY ORDER"*** and click ***"ADD NEW"*** as per (A).



2. Fill in other areas as required. Same steps used as per the description to add ***"ORDER ACCEPTANCE".***

Example:



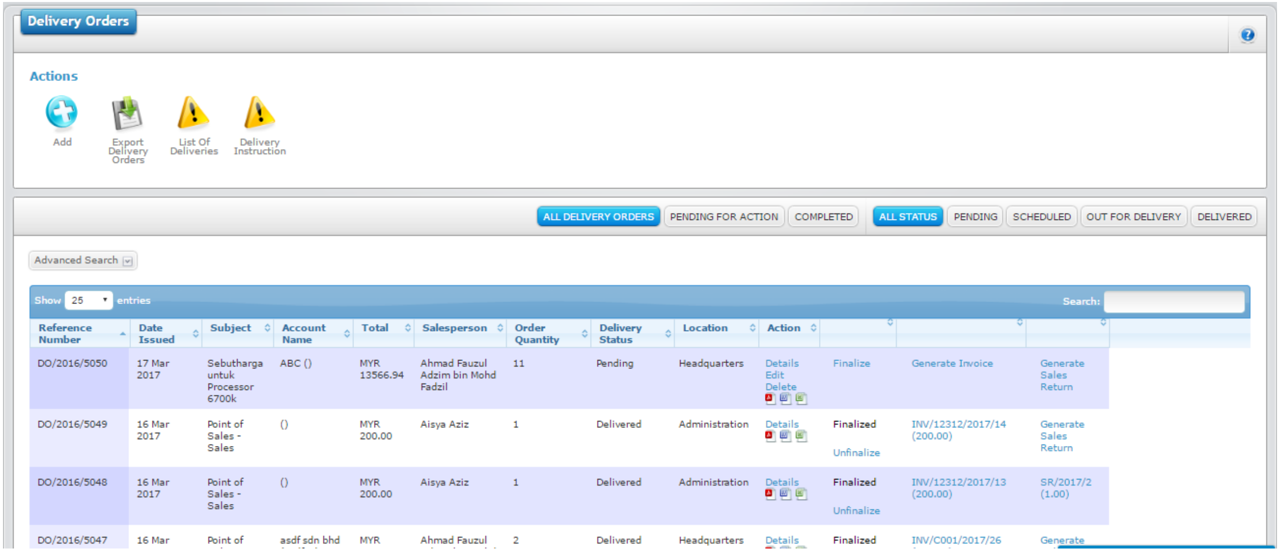


You could also add more than 1 item in one ***"DELIVERY ORDER"*.**

Description:

A	Click on this button to add delivery order.
B	Please state subject of delivery order.
C	Please key in full information of delivery order item.
D	You can add more than one item in delivery order.

You can choose ***" VIEW LIST"*** to view list of your ***"DELIVERY ORDER".***



3. Additional information:

Details **:** To view *Delivery Order* details.

Edit **:** To edit *Delivery Order* information and item.

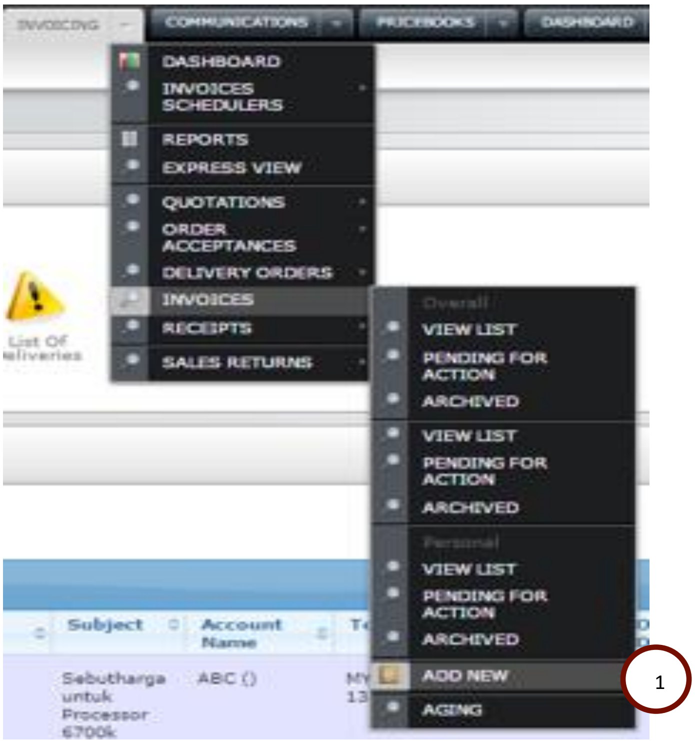
Delete **:** To delete *Delivery Order.*

Finalize : To finalize *Delivery Order* which means that this *Delivery Order* can no longer be amended.

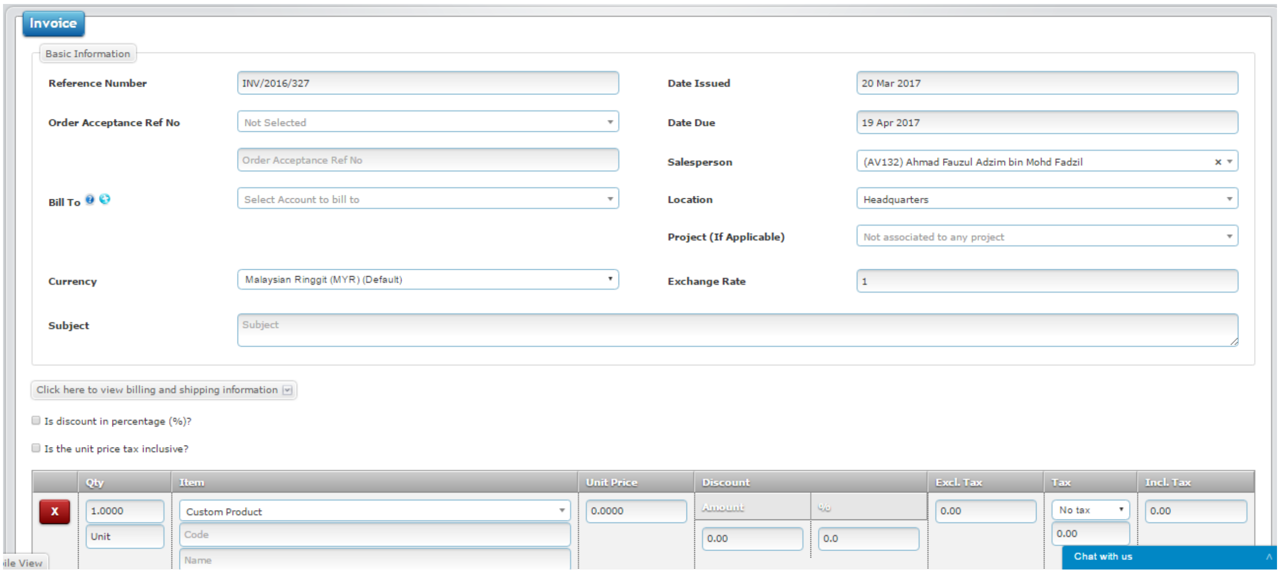
Generate Invoice : To generate *Invoice* automatically based on *Delivery Order* information.

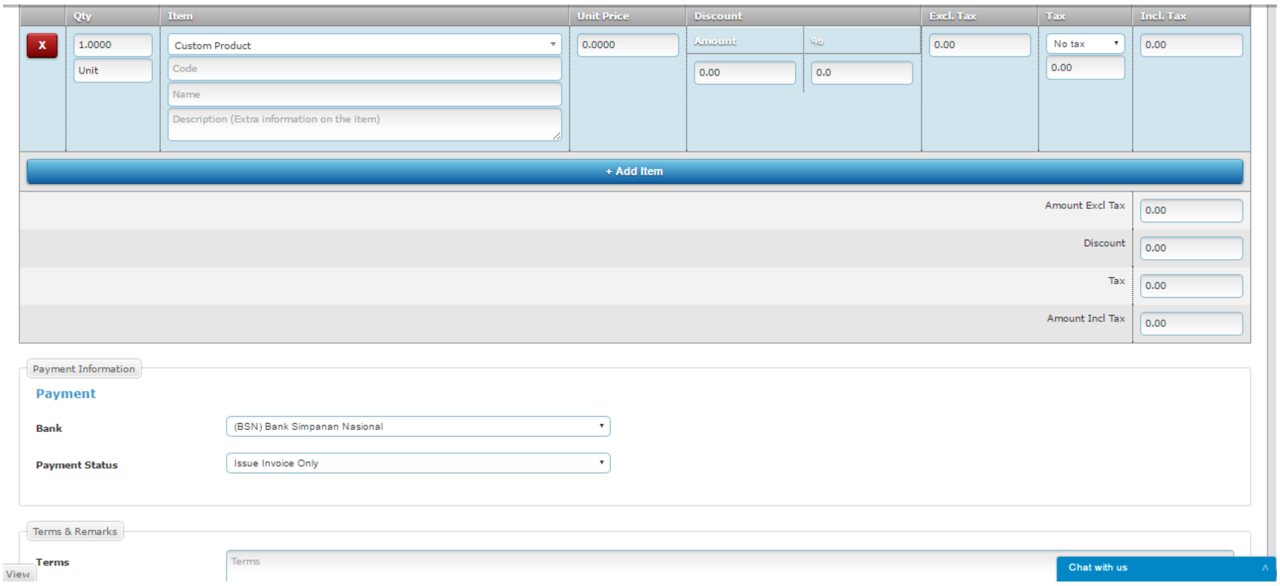
1.6.8 INVOICES

1. Invoice is a document given to customer to obtain payment.
2. Invoice is related to ***"ORDER ACCEPTANCE"*** and ***"DELIVERY ORDER".***
3. Go to ***"INVOICING"*** and select ***" INVOICES "*** and click on ***"ADD NEW"*** as shown in 1.



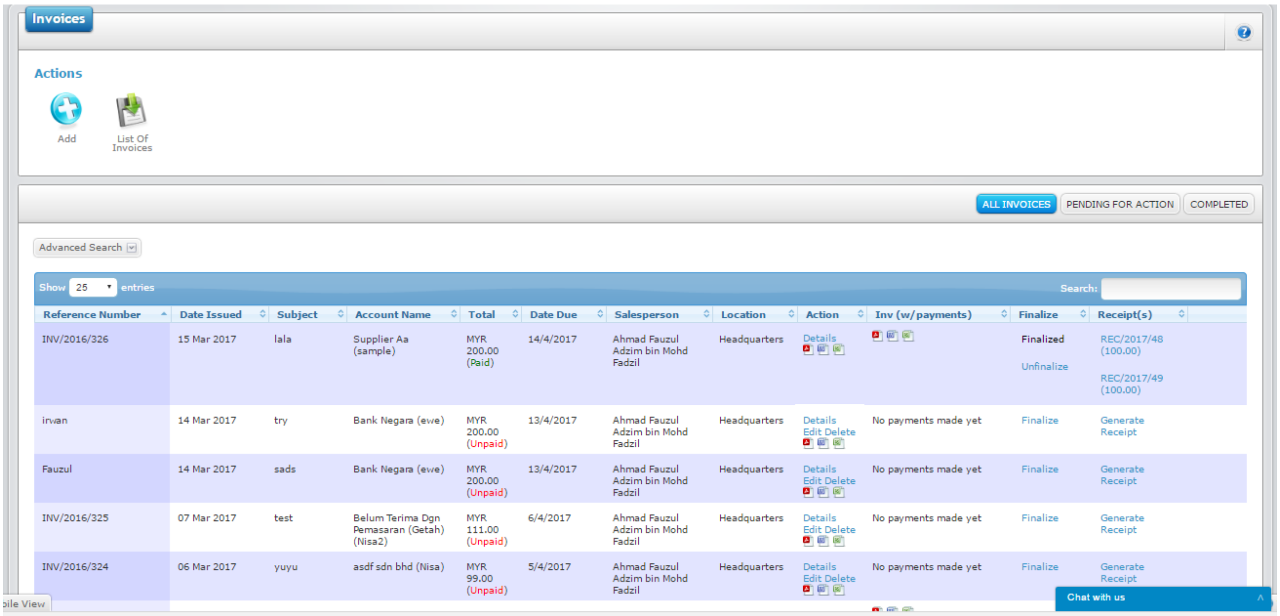
4. You will see the following display when you click on ***"ADD NEW"*** button.





5. Fill in all information as required. The steps are the same as new ***"ORDER ACCEPTANCE".*** The difference is you only need to fill in payment information so that your bank information will be on your invoice receipt.

6. Click ***"VIEW LIST"*** to view list of invoices issued to customer.



7. Description:

Details : To view invoice information.

Edit : To edit invoice information and item.

Delete : To delete invoice.

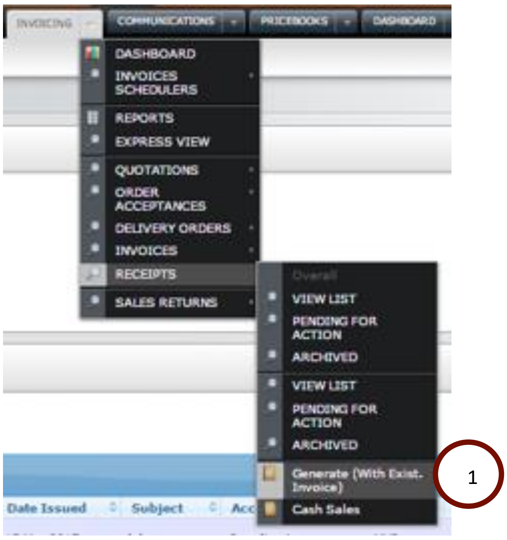
Finalize : To finalize invoice which means invoice can no longer be amended.

Generate Receipt : To generate receipt automatically based on invoice information.

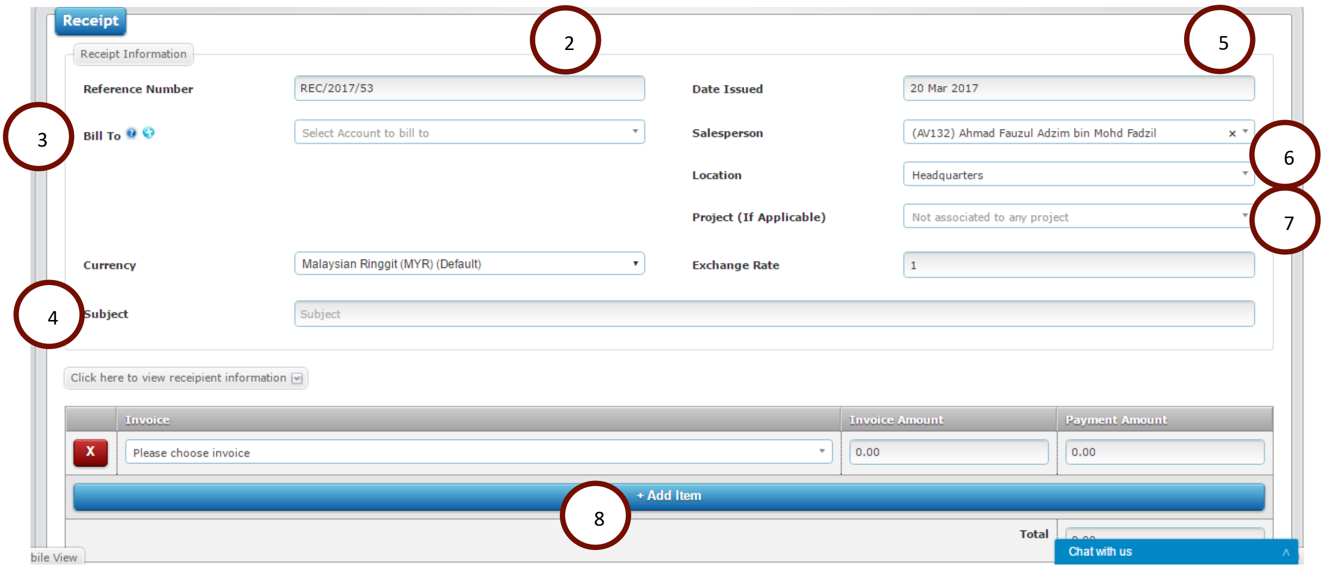
Status will remain ***"unpaid"*** if receipt is yet to be issued.

1.6.9 RECEIPTS

1. Click on ***"INVOICING"***, select ***"RECEIPT"*** and click ***"Generate(with exist invoice)"*** to produce receipt when customer paid for your item.



2. Fill in all required information.

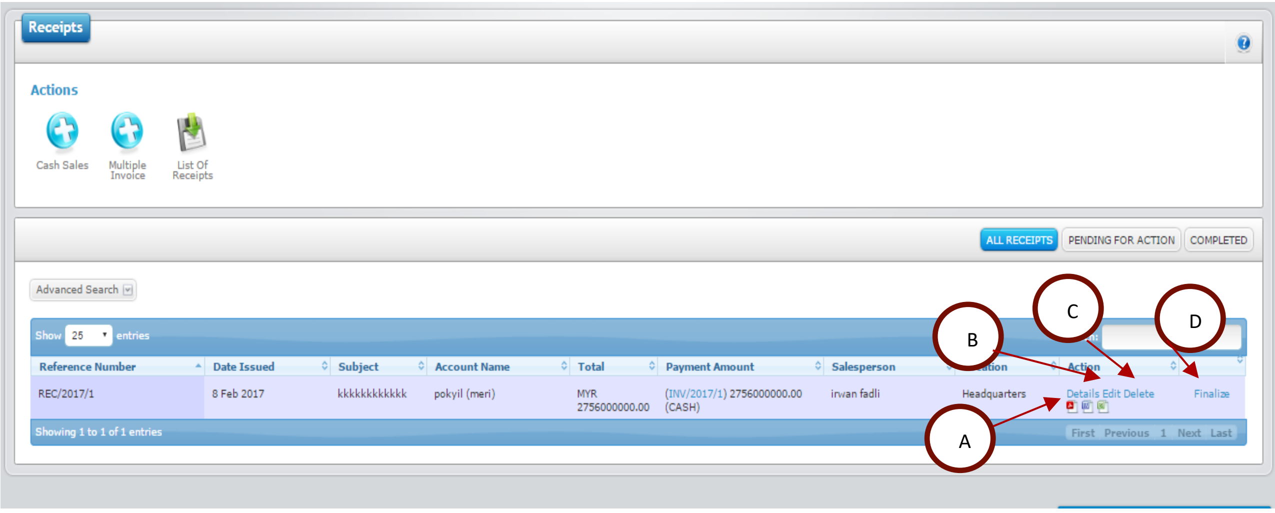


Description:

1	Click on this button to create receipt for your invoice.
2	This reference number is automatically generated according to the sequence of receipt which you created.
3	Select the ***"ACCOUNT"*** which you want to make a receipt.
4	Please state subject of the receipt.
5	Please select receipt issued date.

6	Please select list of salesperson and location of your company which produce this receipt.
7	Please select if this receipt is related to any of your project.
8	Please select the invoice which you would like to make the receipt.

3. You may view list of receipt by selecting ***"VIEW LIST"***.



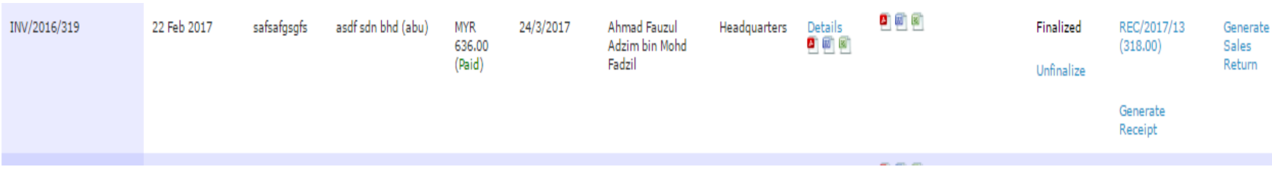
Description:

A	Click on this button to view detail clearly.
B	Click on this button to edit the relavant information.
C	Click on this button to erase any irrelevant data.
D	Click on this button to finalize receipt which means this receipt can not be amended.

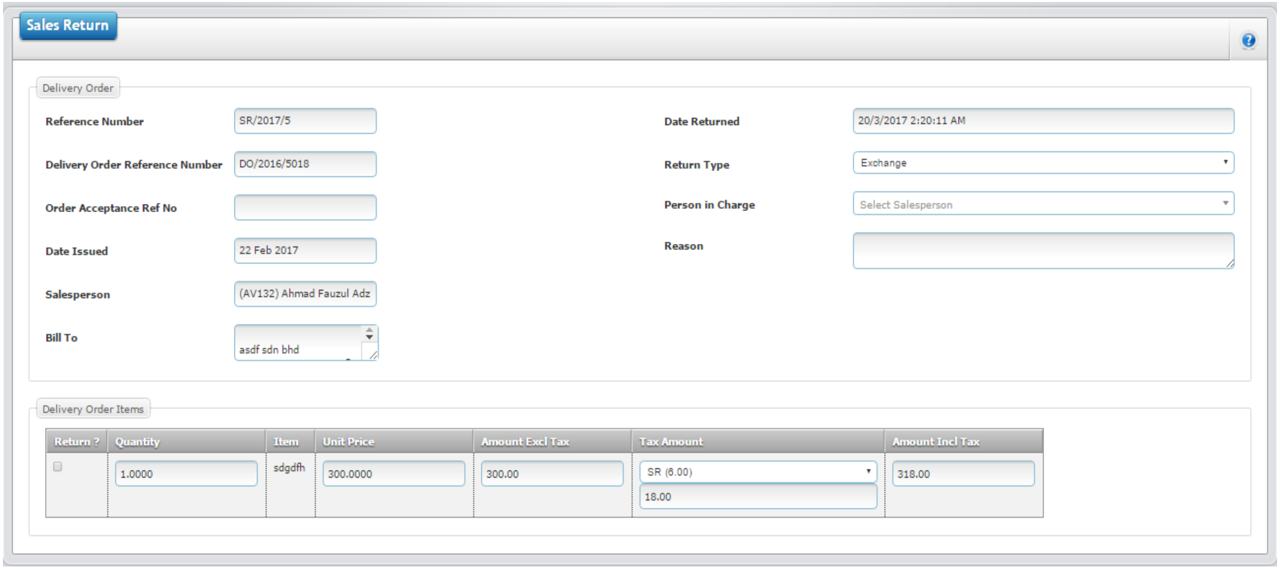
***note: if you click on the cash sale button, you will return to the invoice main page and the steps are the same as creating a new invoice.**

1.6.10 Sales Return

Sales return is for the purpose of recording should there be any return of item from your customer. If there is a return of item from customer, you only need to treat is the same as creating an invoice as per the picture below. You can click on ***"VIEW LIST"*** button in invoice as follow.



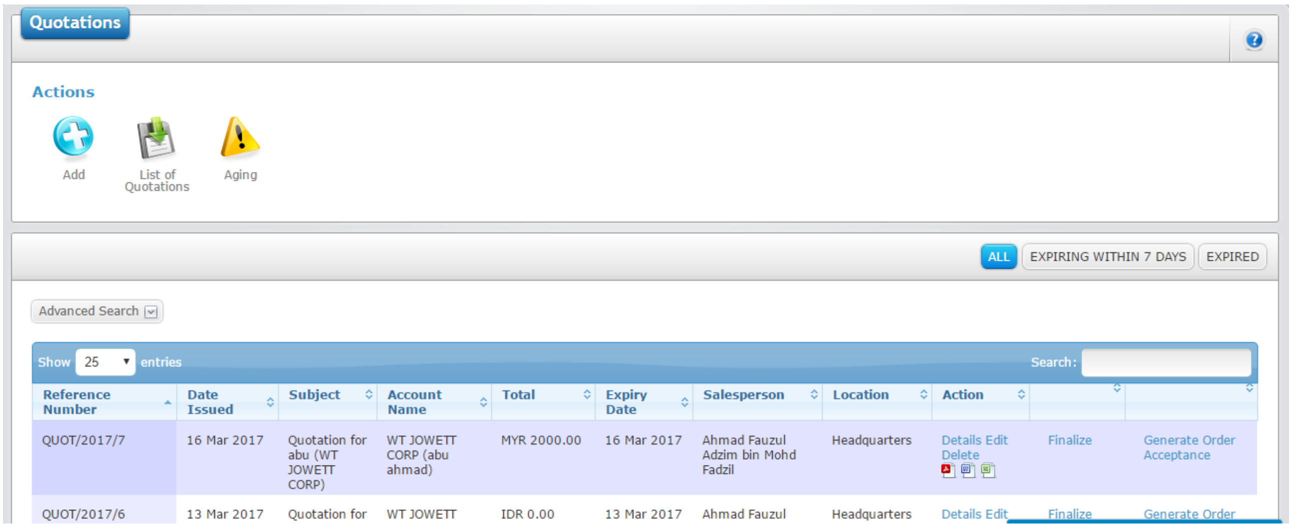
1. You only need to click on ***"Generate Sales Return"*** button and the following display will appear.



2. You only need to key in ***"ORDER ACCEPTANCE REF NO"*** and name of salesperson who issued the invoice as well as reason for the return item.

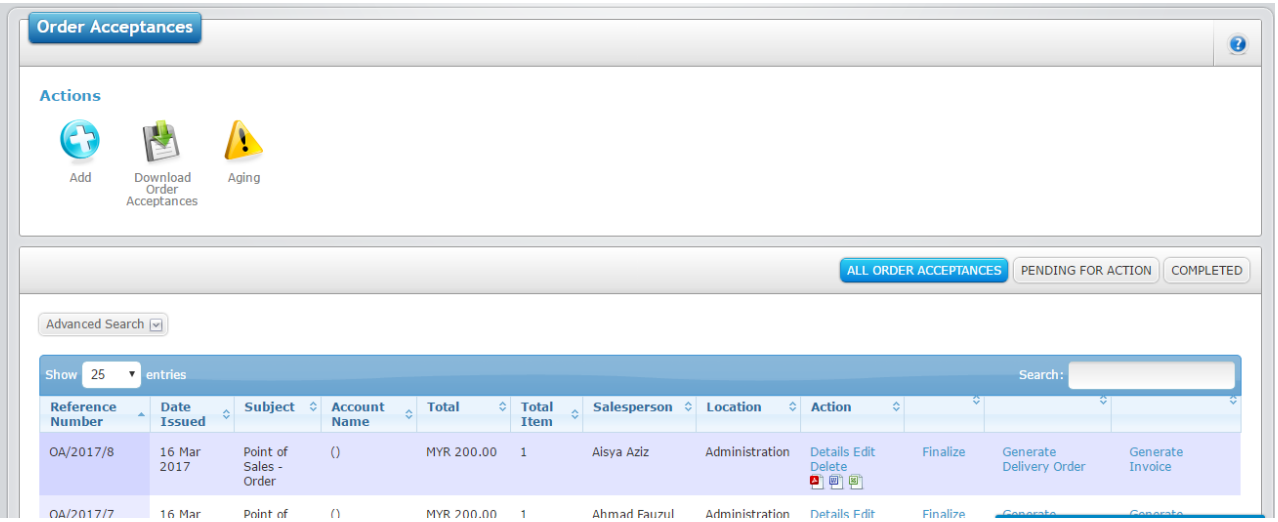
2.0 QUICK WAY TO GENERATE INVOICE

1) Generate ***" ORDER ACCEPTANCE"*** from ***"QUOTATIONS".***



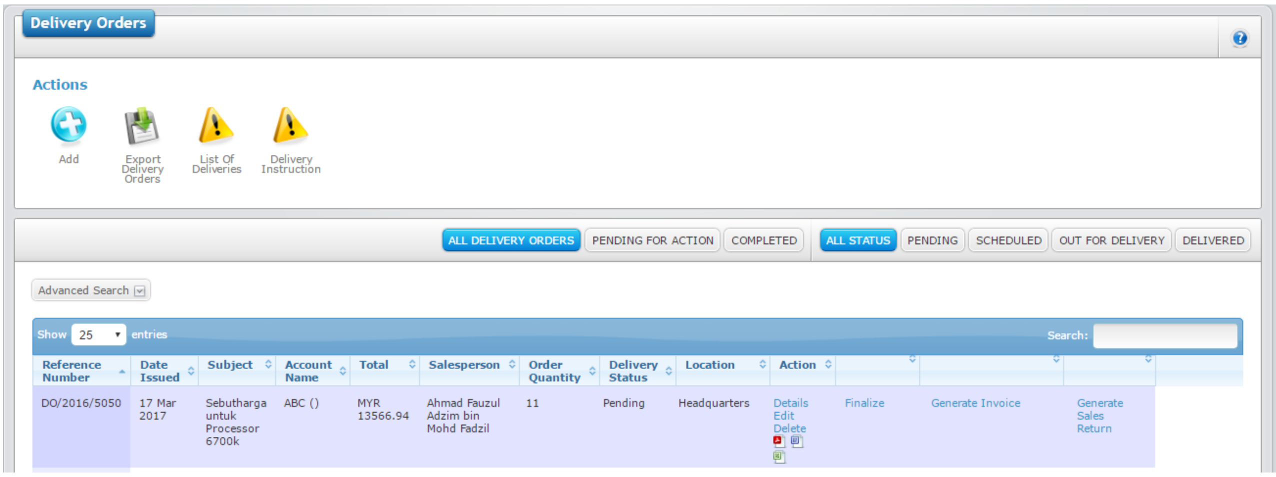
Click ***"Generate Order Acceptance"*** as a short cut to issue ***"Order Acceptance"***.

2) Generate ***"DELIVERY ORDER"*** from ***" ORDER ACCEPTANCE"***



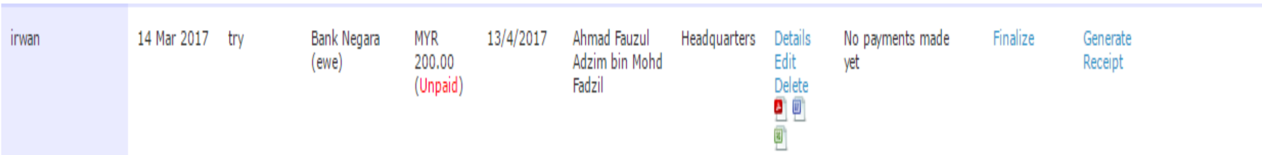
Click ***"GENERATE DELIVERY ORDER"*** as a short cut to issue ***"DELIVERY ORDER"***

3) Generate ***"INVOICES"*** from ***" DELIVERY ORDER"***



Click ***"GENERATE INVOICE"*** as a short cut to issue ***"INVOICES"***

4) Generate "***RECEIPT"*** from ***" INVOICES".***



Click ***"GENERATE RECEIPT"*** as a short cut to issue ***"RECEIPT".***

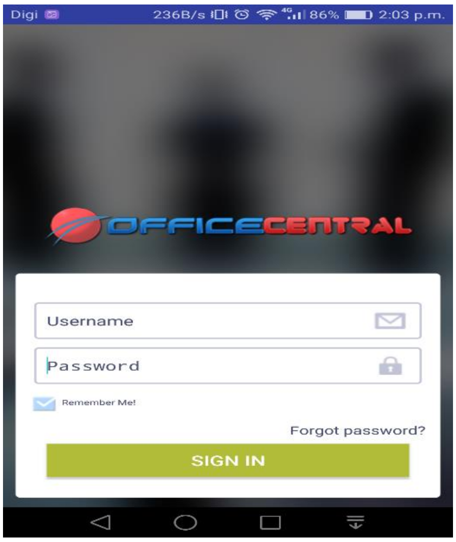
3.0 CRM MOBILE APPLICATION

CRM module also has a mobile application. To access this application, you need to download it first. This application if limited to android users. For iOS system users, this application is still in under development to suit it with iOS users. To download, go to “GOOGLE PLAYSTORE” on your mobile phone and type “***OfficeCentral CRM Mobile”*** and you can download the application.

Below is the application display in “GOOGLE PLAYSTORE”.

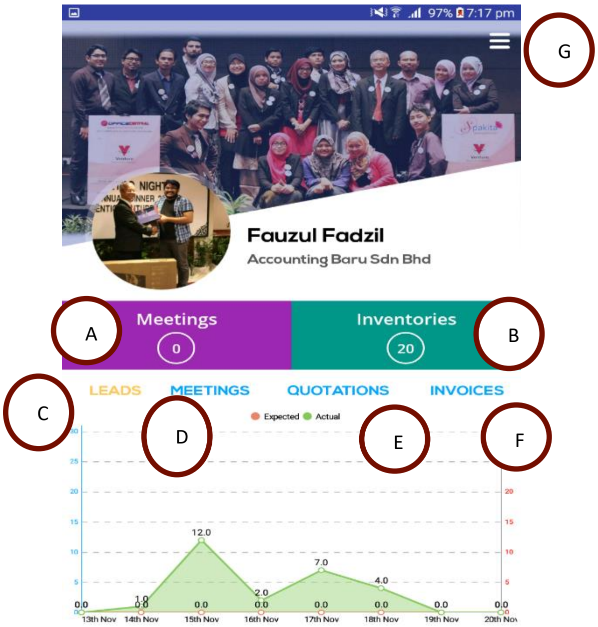
3.1 LOGIN

You will see the following display when you open the application. Next, key in your username and password then click on **LOG IN**.



Once you have logged in, you will see the display to select your company’s name. Click on your company’s name.

Firstly, you will see the display for ***“MEETINGS”*** and ***“INVENTORIES”***. Here it will show the number of meetings and inventories you have.

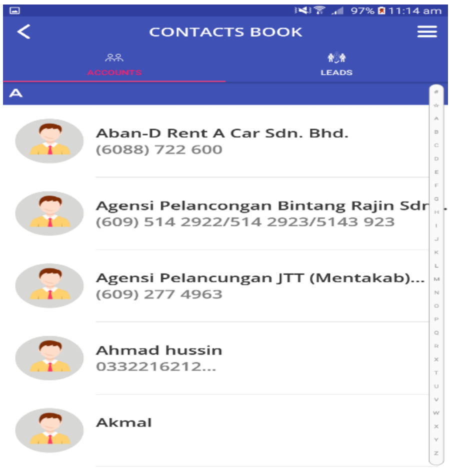


Description:

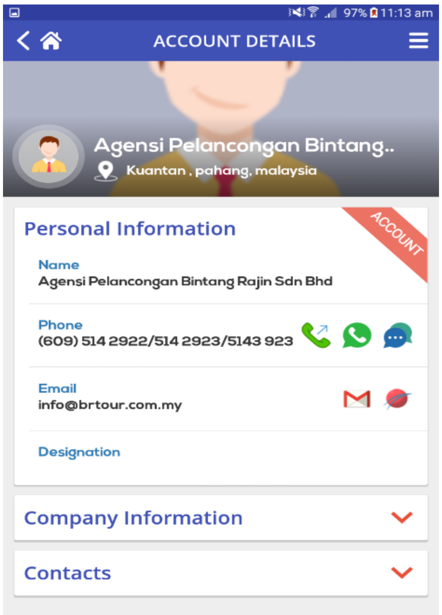
A	Here you can view the number of ***"MEETINGS"*** you have. You can also click to go directly to meetings.
B	Here it shows the numbers of your inventories. You can also click this button to go straight to ***"INVENTORIES".***
C	You can click on ***"LEADS"*** to view ***"LEAD"*** graphs available in your company.
D	You can click on ***"MEETINGS"*** to view ***"MEETINGS"*** graphs available in you company.
E	You can click on ***"QUOTATIONS"*** to view ***"QUOTATIONS"*** graphs available in you company.
F	You can click on ***"INVOICES"*** to view ***"INVOICES"*** graphs available in you company.
G	Click to view available menu in this phone application.

3.2 CONTACT BOOK

When you click on contact book, you will see the following display:

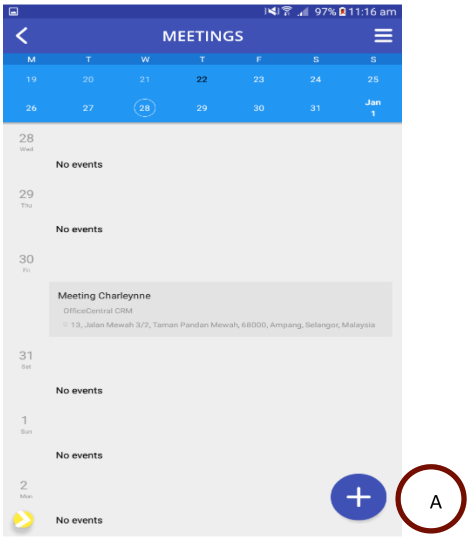


Here you can view your **ACCOUNT** and **LEADS.** You can also click on any of your **ACCCOUNT** to view the details. You will see the following display:

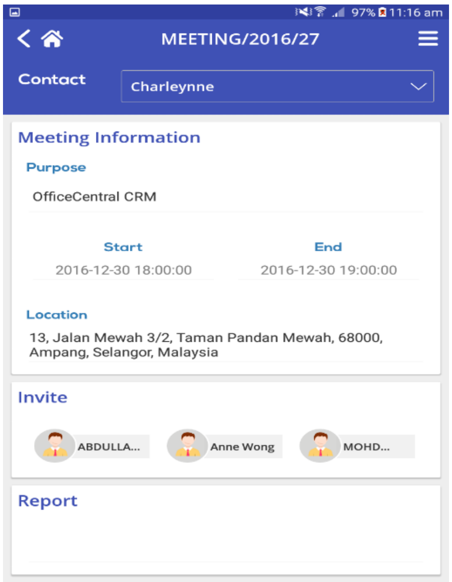


3.3 MEETINGS

In meetings, you can view list of meetings you had and list of meetings you staff entered into the system. The display is as follow:



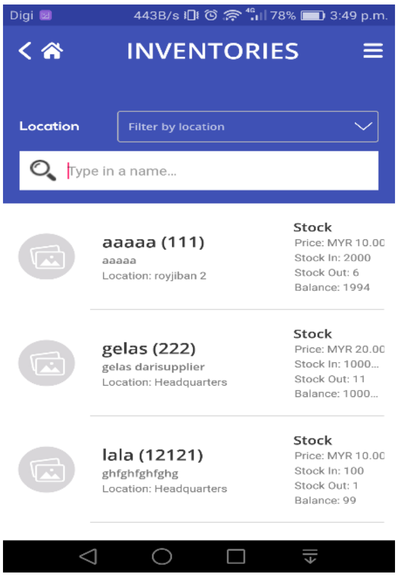
Here it displays through calendar and dates. You can click on (A) to add new ***"MEETINGS".*** When you add ***"MEETINGS",*** you will see display as follows:



You need to key in information to create the ***"MEETINGS",*** such as purpose, location and invitation.

3.4 INVENTORIES

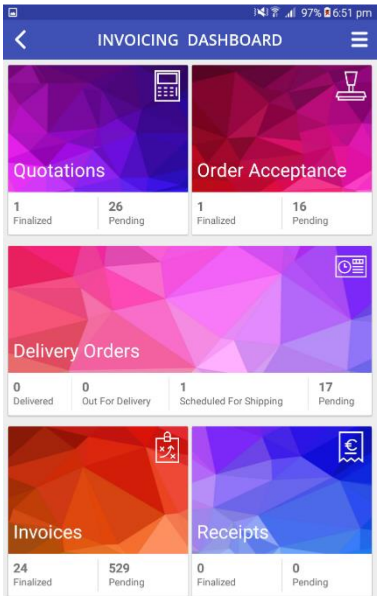
In inventories, you can view your company's inventories. You can also view available inventories at each branch. You can see the following display when you click on inventories button:



You can also search for your inventories using name or location.

3.5 INVOICING

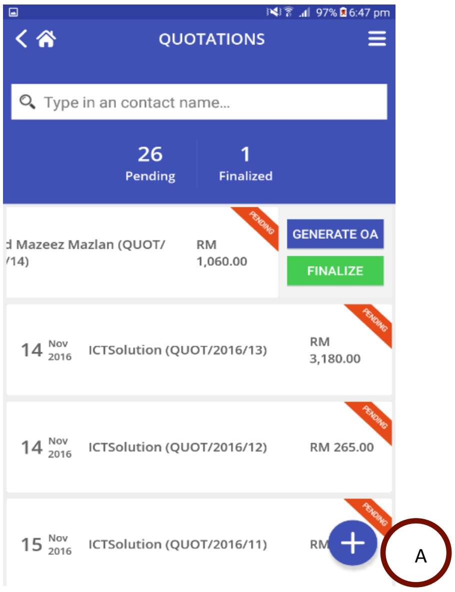
When you go to the ***"INVOICING"*** menu, you will see the display as follows:



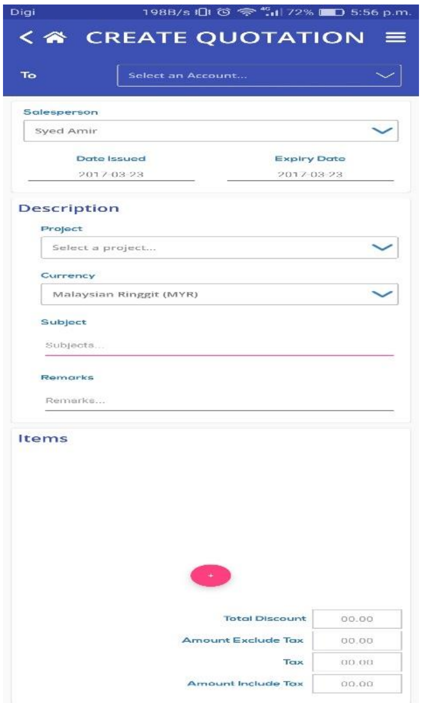
Display when you click the ***"INVOICING"*** button. Here it displays the overall sequence when your customer make a purchase from you. Here, you can also view list of sequence as shown above.

3.5.1 QUOTATIONS

You can also create ***"QUOTATION"*** using this application. You can click on ***"QUOTATION"*** on the main display and you will see quotation display as follows:



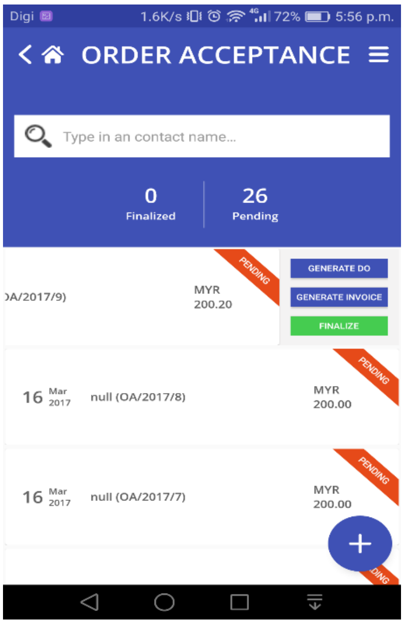
You can directly create ***"ORDER ACCEPTANCE"*** from this ***"QUOTATION"***. You can add ***"QUOTATION"*** by clicking (A). You will see the display as follows:



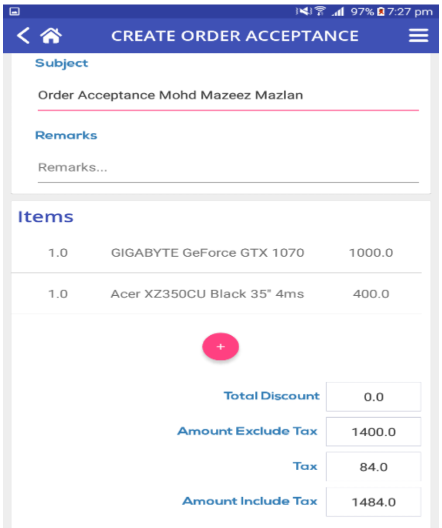
You only need to fill the blanks above. The steps are the same as filling in new ***"QUOTATION"*** in web system.

3.5.2 ORDER ACCEPTANCE

You can click on ***"ORDER ACCEPTANCE"*** to view its list and to add new order acceptance. You will be able to see the following display if you click on ***"ORDER ACCEPTANCE".***



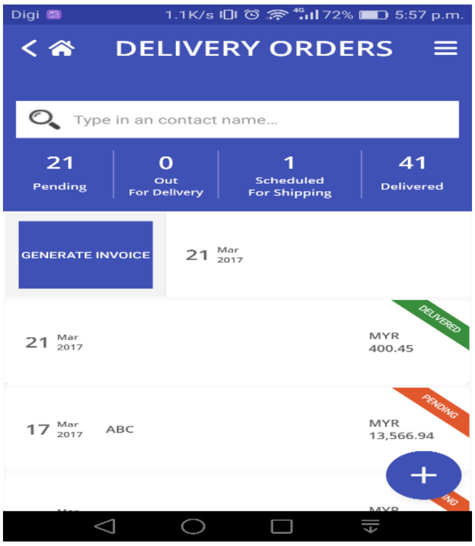
You can add ***"ORDER ACCEPTANCE"*** by clicking the add button. Next, you will see the following display after clicking on the "+".



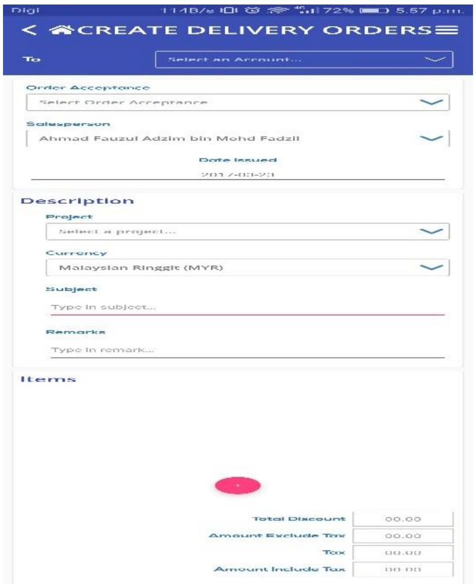
You only need to fill in the blanks. The steps are the same as using CRM in website.

3.5.3 DELIVERY ORDER

After clicking on ***"DELIVERY ORDER",*** you will see the following display:



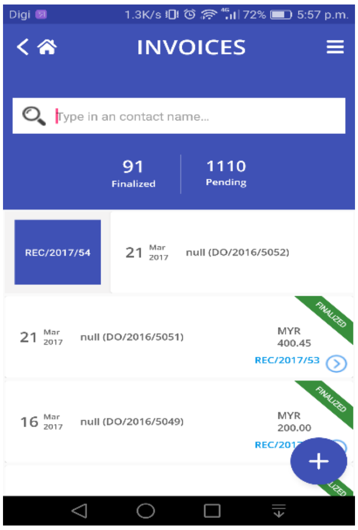
You can view the overall ***"DELIVERY ORDER"*** created. You can grad the ***"DELIVERY ORDER"*** to the right or left to directly create invoice. You can add ***"DELIVERY ORDER"*** here by clicking on the plus button. Below is the display when you add a new ***"DELIVERY ORDER".***



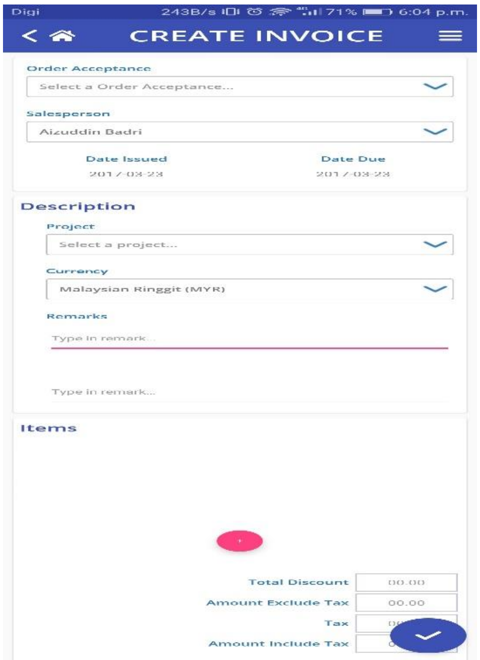
You only need to fill in all information here just like filling in information for ***"DELIVERY ORDER"*** on system website.

3.5.4 INVOICES

Below is the display for ***"INVOICE"*** when you click on invoices button.



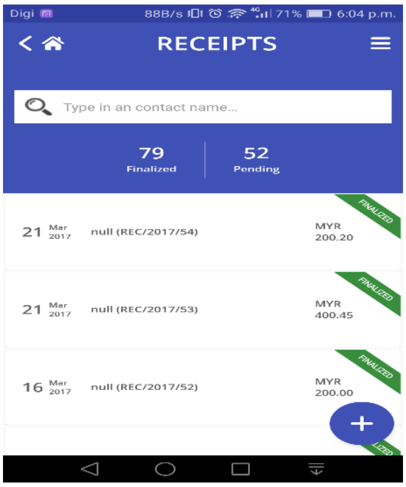
You can view overall ***"INVOICE"*** creted. You can drag ***"INVOICE"*** to right or left to directly create a receipt. You can add invoice here by clicking the plus button. Below is the display when you add new ***"INVOICE".***



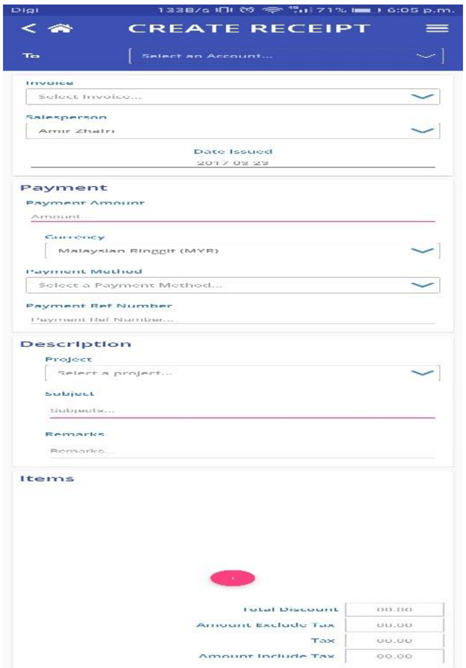
You only have to fill all information here just like filling information when creating ***"INVOICE"*** on system website.

3.5.5 RECEIPTS

When you click on ***"RECEIPT"*** button, you will be able to view the following display.



You can view the overall ***"RECEIPT"*** created. You can add new receipt here by clicking the plus button. Below is the display when you add new ***"RECEIPT".***



Enter data in the space provided. Start by selecting account then item.

***Note: everything that is done in the application will automatically be updated in system website.**