

SmartBusiness



SMARTBUSINESS

User Manual

Smart Business Solution Member

By United Technologies (INT'L) Ltd.



X-ANALYZE
SmartBusiness
BY UNITED TECHNOLOGIES

Table of Contents

Introduction	5
Start Using SmartBusiness	5
Pre-setup Reminder	5
Types of users in SB	6
SB and ABSS diagram	7
Retail	8
Retail Order	8
Retail Order (Advanced).....	11
Refunds Order	18
Sales Order List.....	19
Day-ends.....	20
Billing #1 - Count Payment Summary	22
Billing #2 - Count Payments Detail	23
Billing #3 - Session Item Sales	24
Billing #4 - Deposit.....	25
Customer	27
Customer Management	27
Point Level	49
Add Customer	51
Enquiry	53
Items	58
New Item.....	58
Stock.....	61
Stock Transfer	64
Stock Transfer Order	66
Category.....	69
Out-of-Stock Items	71
Promotion	72

Table of Contents

eBlast	72
Track Result	74
Item Period Promotion	75
Item Quantity Promotion	78
Promotion List	79
WholeSales	81
Add Order	81
WholeSale Order Management (for Delivery)	84
WholeSales Order List (for Approval)	86
Purchase	87
New Purchase Order	87
Purchase Order Management	89
Purchase Order List	95
Supplier Management	99
Data Integration	103
ABSS to SB	104
SB to ABSS	105
Report	106
Transaction details	106
Payment method details	108
Item Sales Details	110
ABSS Report	112
Quotation	112
Account Receivable	112
Salesperson Performance	113
Customer Invoice	113
Record	114
Attendance Records	114

Table of Contents

Job Records	115
Training Records	116
Journal Records.....	117
Setup	118
Email settings	118
Other Setting.....	119
Payment Types	121
Receipt	124
User Management.....	126
Exchange Rate Setup.....	129
Search	130
Search for Receipt Number.....	130
Search for Serial Number.....	131
Search for Batch Number.....	132

Everything in the user manual is provided as is. The information expressed in this document, including URLs and other website references, is subject to change at any time without notice. Some of the examples and/or images described herein are for illustrative purposes only and are purely fictitious. Any similarities are purely coincidental.

SmartBusiness User Manual V2

© 2024 United Technologies (Int'l) Limited. All rights reserved.

SmartBusiness – Introduction

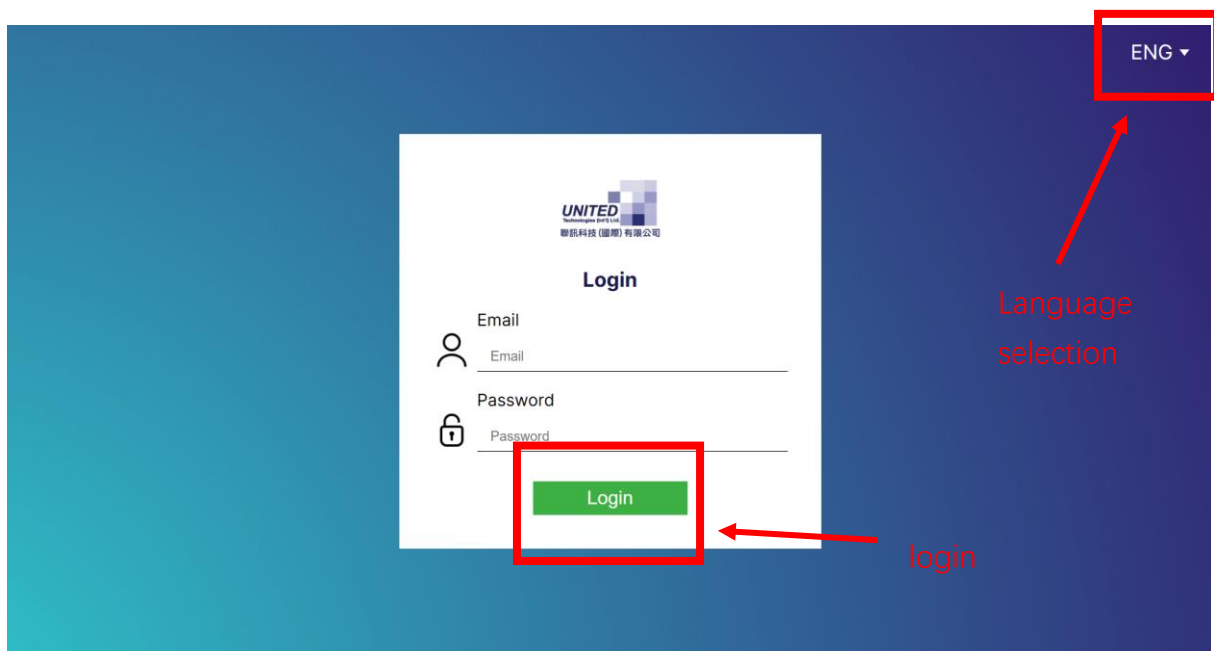
Introduction

Thank you for choosing SmartBusiness.

SmartBusiness (SB) is a retail and wholesale software, this manual will provide you with the necessary information to help you understand and familiarize yourself with SB.

Start Using SmartBusiness

1. Enter the SmartBusiness URL into your web browser: <https://app.united.com.hk>
2. The interface is available in three languages: Traditional, Simplified, and English.
3. Once the page loads, you will see a login page, please enter your account email and password.
4. Press **Login** when you're done.



Pre-setup Reminder

1. Please provide a display name, a valid WhatsApp number and an email address.
2. Since this system uses Microsoft API, it is recommended to use Microsoft email as a registered email, usually: **xxx@outlook.com** or **xxx@hotmail.com**.
 - If you are unable to use Microsoft email, please use Microsoft 365's registered email.
3. SB must be used with the accounting software ABSS (v22.3/v23.9).

SmartBusiness – Introduction

4. Some pages in SB will have a **"Remove" button** to delete some data, however, since all data is based on ABSS, this button does not completely remove all data.
 - To remove information, certain conditions are required, such as the system checks whether the project has been traded, and if there has been a transaction, the data will not be easily removed.
 - To ensure consistency between SB and ABSS data, please perform "data integration" after changing the data.
 - I. When using SB at the end of the day, please **update the data of SB to ABSS.**
 - II. Similarly, at the beginning of the day, **update the ABSS data to the SB.**

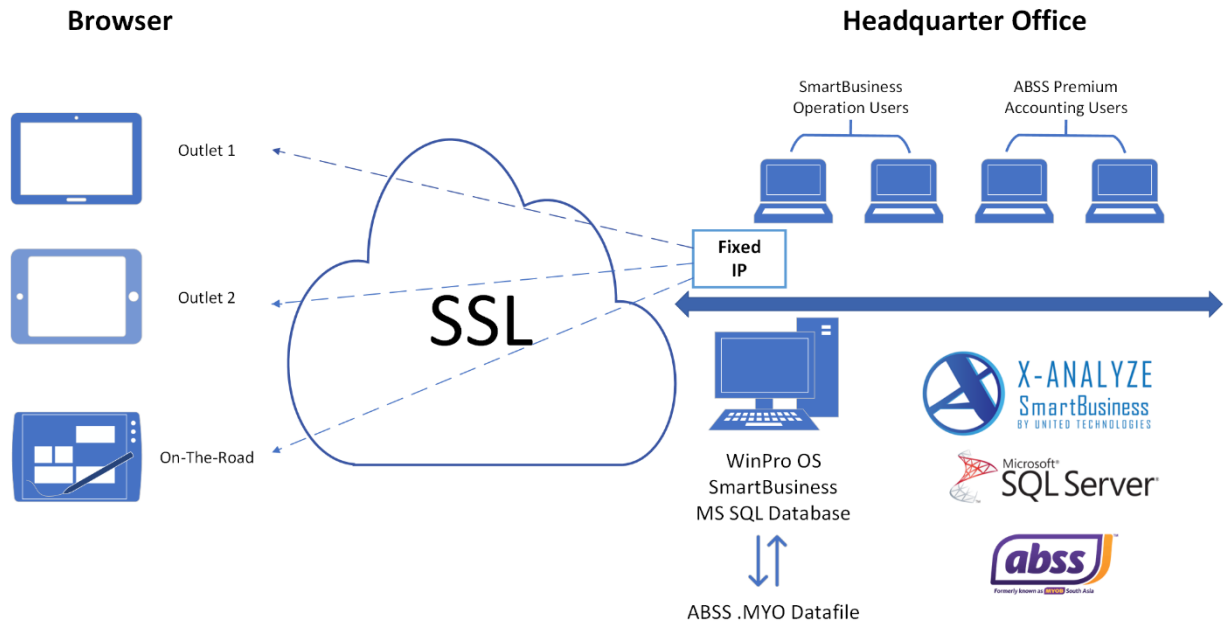
Types of users in SB

SB is mainly divided into three types of users: **Administrator, Manager and Sales.**

1. SB will initially provide an Administrator user.
 - There are also optional Manager users.
2. Users other than administrators and managers are salespeople, and the names should be sales01, sales02... And so on.
3. Sales - admin is the basic process between the two users: sales, the salesclerk, applies to the administrator admin for approval of purchase, wholesale and other billing actions.
4. If the customer does not need to approve the function, sales will be set to the role of manager and can be billed directly without further approval.

SmartBusiness – Introduction

SB and ABSS diagram



SmartBusiness - Retail

Retail

Retail Order



SmartBusiness

- Retail
- Retail Order**
- Retail Order (Advanced)
- Refunds Order
- Sales Order List
- Day-Ends
- Customer

The "Retail Order" acts as a cash register, processing payments to customers at the counter.

In the navigation bar, tap **Retail > Retail Order**.

The screenshot displays the SmartBusiness application interface. On the left, a 'Software' catalog is visible with four items:

Software	Price	Discount
MYOB Premier v22.3 with 3 Users License	\$8688.00	Disc%: <input type="text"/>
ABSS Premier v23.3 with 1 User License	\$4788.00	Disc%: <input type="text"/>
ABSS Premier Plus v23.3 with 3 Users License	\$10488.00	Disc%: <input type="text"/>
ABSS Premier Plus v23.9 with 1 User License	\$5888.00	Disc%: <input type="text"/>

On the right, the 'Order List' for Transaction ID KL100019 is shown. It includes a '+ Add Customer' button, input fields for Customer name, Phone No., Price Level, Points, and Currency, and a 'Scan Barcode' button. The order list contains one item:

Item	Price	Quantity
MYOB Premier v22.3 with 3 Users License (ABSSPV23.9-3U)	8688.00	1

Below the order list, a summary table shows the total amount:

Category	Amount
SubTotal	\$ 8688.00
Discount	\$ 0.00
Tax	\$ 0.00
Total	\$ 8688.00

A 'Checkout' button is located at the bottom right of the order list, with the total amount of \$ 8688.00 displayed next to it.

SmartBusiness - Retail

Before making the retail order, select or add the customer who makes the order.

Double click “Please enter customer” to search and select the customer.

Search Customer ✕

Customer Code, Name or Phone Search

Customer Code	Customer Name
08080000000	ALL FOR GOD
+2348069112014	ALL FOR GOD INT'L CO
234233232	CusTest01
Masons	Freemason
GUEST	GUEST
92071752	Kim LEUNG
95643210	Mary Hung
98765432	Peter Chan
rand	Random Co. Ltd.
47579543	Random Company LTD
YT0001	YT Company Limited
陳大文	某某有限公司
CS0001	香港某某进出口有限公司

Cancel

SmartBusiness - Retail

Click "**Add Customer**" and fill in information of the new customer to add new customer into the system. Fields marked with asterisk (*) are mandatory.

Add Customer

Fields marked with asterisk (*) are mandatory.

Payment is Due

C.O.D. ▼

Balance Due Days

Name*

(Maximum character length: 50)

Phone*

Contact*

Email

City

— ▼

Country

Hong Kong ▼

Website

Points

Bill Address

Street 1

Street 2

Delivery Address1

Street 1

Street 2

Delivery Address2

Street 1

Street 2

Delivery Address3

Street 1

Street 2

Other Address

Street 1

Street 2

Mobile 1

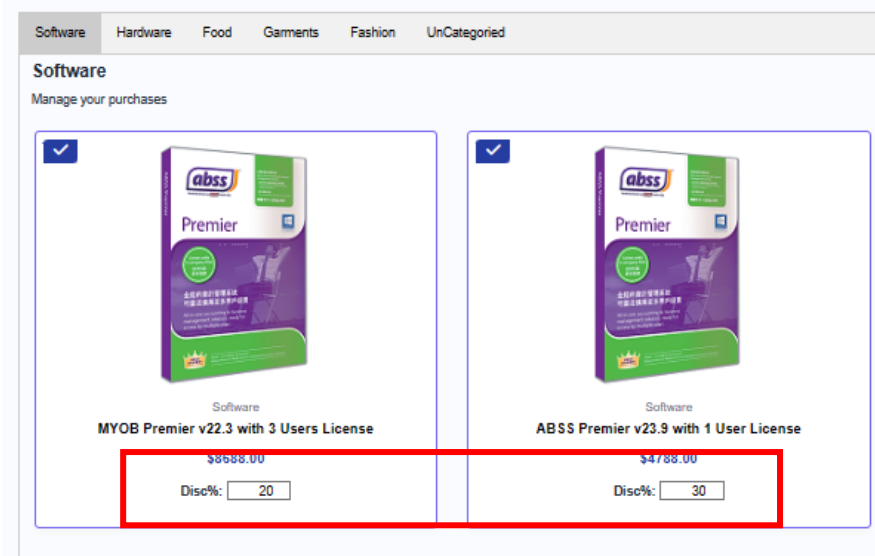
Mobile 2

Save

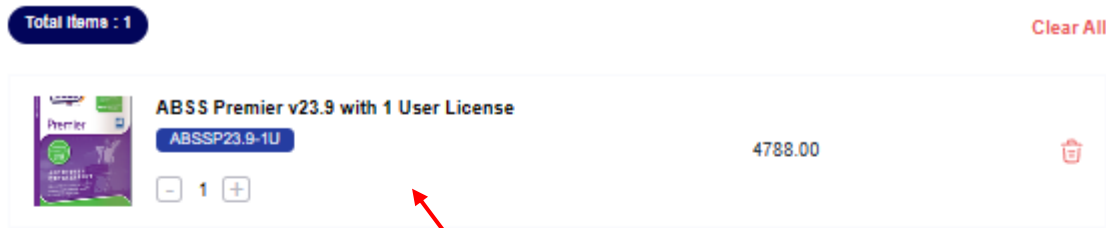
[Back To List](#)

SmartBusiness - Retail

In the retail window, user can select products from each category and user can adjust the discount rate in each product under the price.



Discount can be adjusted and applied in the retail order



Summary of selected products / items

- Showing the name of the product
- Quantity
- Price

Selected products can be deleted by clicking the "Bin" icon on the right hand side.



Click Checkout button after finishing the retail order

SmartBusiness - Retail

Click the blue **“Checkout”** button after finishing the retail order.

Select currency.

Payment method

Retail Order - Payment

Sales Amount:
\$ 10,488.00

Pay with:

✓ Cash + Coupon + Visa + Mastercard + Alipay + WeChat Pay

Single payment method applied

Cash 0 HKD

Remaining 10,488 HKD

Monthly Pay
Generate invoice

Pay Now
Confirm payment

ePayment

Payer code

Reverse Payment Transaction Result

Order Summary #36686

Date 27 Dec 2023
Time 12:13 pm

Items

ABSS Premier Plus v23.9 with 3 Users	\$
License x 1	10,488

Tax \$0
Discount \$0
Total amount \$10,488

After pressing Process payment, a window for the payment method will pop up.

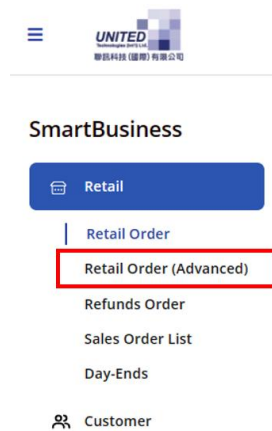
Payment methods are as follows:

1. cash
2. Gift certificate
3. Visa card
4. Mastercard
5. Alipay
6. WeChat Pay

After selecting the payment method, click **“Pay Now”** if you want to confirm the payment now. If you want to pay monthly, click **“Monthly Pay”** to generate the invoice.

SmartBusiness - Retail

Retail Order (Advanced)



The "Retail Order" acts as a cash register, processing payments to customers at the counter.

In the navigation bar, tap **Retail > Retail Order (Advanced)**.

In Customers, select your customer. Double press the field to search for different customers.

Double click here to search for customers

Make Sales

Customer: **GUEST** Points: Price Level: Phone No.: Invoice No.:

Device:

Please enter a negative number in Qty for a negative amount.

Search Customer
Window:

Search Customer

Customer Code, Name or Phone Search

Customer Code	Customer Name
0808000000	ALL FOR GOD
+2348069112014	ALL FOR GOD INT'L CO
UCME	Bing Chiling Co. Ltd.
Masons	Freemason
GUEST	GUEST
07041776	Illuminati
rand	Random Co. Ltd.
47579543	Random Company LTD
YT0001	YT Company Limited
陳大文	某某有限公司

Records 1 - 10 of 11 >

SmartBusiness - Retail

Double click the currency field to browse the exchange rate.

The screenshot shows the main interface with a currency field set to 'HKD'. A yellow box highlights the 'Currency' dropdown and the 'Apply to all sales location' checkbox. A yellow arrow points from this box to a pop-up window titled 'Exchange Rate'. The pop-up window contains a table with the following data:

Currency	Exchange Rate
HKD	1
GBP	9.9
USD	7.8
CNY	1.13
EUR	8.43

The pop-up window also has a 'Close' button at the bottom right.

Enter product information.

The screenshot shows the product information entry form. At the top, there is a red warning message: "Please enter a negative number in Qty for a negative amount." Below this is a table with columns: Item Code, Description, Base Unit, Qty, Batch, SN, Expiry Date, Item Variations, Price (\$), Disc%, Tax%, Location, Job, and Amount (\$). The 'Qty' field contains the number '1'. Below the table are two text input fields for 'Notes' and 'Internal Notes'. On the right side, there are fields for 'Rounding (\$)' (0.00) and 'Total (\$)' (0.00). At the bottom right, there are two buttons: 'Process Payments' (blue) and 'New Sales' (green).

Item code

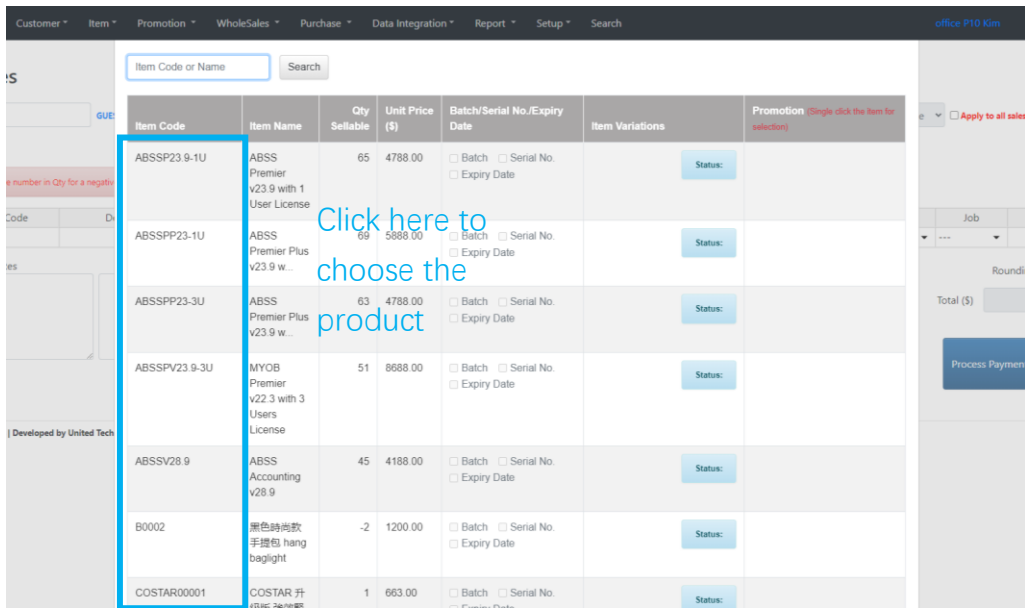
After pressing the product code field, a search window will pop up.

The screenshot shows the product search window. At the top, there is a red warning message: "Please enter a negative number in Qty for a negative amount." Below this is a table with columns: Item Code, Item Name, Qty, Unit Price, Subtotal (\$), Substitution No., Expiry Date, Item Variations, and Promotion. The 'Qty' field contains the number '1'. Below the table are two text input fields for 'Notes' and 'Internal Notes'. A blue arrow points from the 'Item Code' field in the main interface to the search window. The search window shows a list of products with the following data:

Item Code	Item Name	Qty	Unit Price	Subtotal (\$)	Substitution No.	Expiry Date	Item Variations	Promotion
AB001	AB001	08	1190.00					
AB002	AB002	08	580.00					
AB003	AB003	03	4100.00					
AB004	AB004	51	880.00					
AB005	AB005	40	4100.00					
AB006	AB006	2	1000.00					
AB007	AB007	1	600.00					

Please click on the desired product.

SmartBusiness - Retail



Enter the Batch, Serial Number, and Expiration Date in order.

Base Unit	Qty	Batch	SN	Expiry Date	Item Variations	Price (\$)	Disc%
PCS	1					430.00	0.00

Notes

Input Batch (1), Serial Number (2) and Expiration Date (3):

Batch

office: T0004

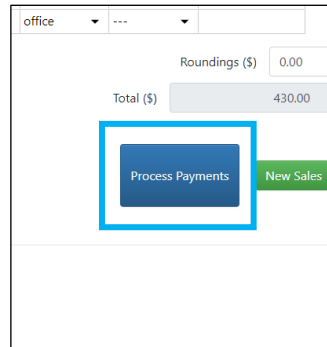
Batch No.	Serial No. (Expiry Date)	Delivered Qty	Total Qty
test1	<input type="checkbox"/> test2 (2023-07-21) <input type="checkbox"/> test3 (2023-07-21) <input type="checkbox"/> test4 (2023-07-21) <input type="checkbox"/> test5 (2023-07-21) <input type="checkbox"/> test6 (2023-07-21) <input type="checkbox"/> test7 (2023-07-21) <input type="checkbox"/> test8 (2023-07-21) <input type="checkbox"/> test9 (2023-07-21)	1	9
test1	<input type="checkbox"/> test2 (2023-07-21) <input type="checkbox"/> test3 (2023-07-21) <input type="checkbox"/> test4 (2023-07-21) <input type="checkbox"/> test5 (2023-07-21) <input type="checkbox"/> test6 (2023-07-21) <input type="checkbox"/> test7 (2023-07-21) <input type="checkbox"/> test8 (2023-07-21) <input type="checkbox"/> test9 (2023-07-21)	1	9

Delivery Qty:

OK Cancel

SmartBusiness - Retail

When finished, click "**Process Payment**".



Payment method

Retail Order - Payment

Sales Amount:
\$ 10,488.00

Pay with:

Cash + Coupon + Visa + Mastercard + Alipay + WeChat Pay

Single payment method applied

Cash 0 HKD

Remaining 10,488 HKD

Monthly Pay
Generate invoice

Pay Now
Confirm payment

\$ HKD Select currency

ePayment

Payer code

Reverse Payment **Transaction Result**

Order Summary #36686

Date 27 Dec 2023
Time 12:13 pm

Items

ABSS Premier Plus v23.9 with 3 Users	\$
License x 1	10,488

Tax \$0
Discount \$0
Total amount \$10,488

Select currency.

After pressing Process payment, a window for the payment method will pop up.

Payment methods are as follows:

7. cash
8. Gift certificate
9. Visa card
10. Mastercard
11. Alipay
12. WeChat Pay

After selecting the payment method, click "**Pay Now**" if you want to confirm the payment now. If you want to pay monthly, click "**Monthly Pay**" to generate the invoice.

SmartBusiness - Retail

Print retail documents

 Proview Hong Kong Ltd. Rm1501, FL15, No.20 Westlands Rd., Westlands Center, QuarryBay, Hong Kong ☎:29601002 🌐:https://united.com.hk					
Welcome Receipt					
P10-KL100091					
2023-07-20 18:18:36					
Kim					
Item	Qty	Price	Disc%	Tax%	Amount
T0003					
澳洲M4和牛肉眼(急凍-18°C)					
SN:					
	1	\$208.00	-	0.00	\$208.00
Remark					
		SubTotal			\$208.00
		Total			\$208.00
		Cash			HKD208.00
多謝惠顧					

Once the payment is confirmed, a new label will pop up for previewing the printed receipt.

(← Sample receipt).

SmartBusiness - Retail

Refunds Order



SmartBusiness

- Retail
 - Retail Order
 - Retail Order (Advanced)
 - Refunds Order**
 - Sales Order List
 - Day-Ends
- Customer

The Refunds Order is used to process the customer's refund.

In the navigation bar, tap **Retail > Refunds Order**.

The screenshot shows the 'New Refund' form with the following fields and annotations:

- Device Code: P10 (Annotated with '1')
- Receipt No. (Annotated with '2')
- Phone No. (Annotated with '3 (Optional)')
- Search Receipt button (Annotated with '3 (Optional)')
- Customer (Greyed out)
- Points (Greyed out)
- Price Level (Greyed out)
- Phone No. (Greyed out)

1. Before refunding, please check whether the **device code in the guest's receipt** matches the **device code on the page**. Refunds can only be made by the same device at the time of sale. For example, if the device code used for sale is P10, the same device P10 must be used for refunds.
2. Enter the receipt number (phone number if blanks are not available).
3. When you're done, search for receipts by searching for receipts.

The screenshot shows the refund summary screen with the following elements:

Tax%	Location	Refund Qty	Ref. Amt.	Seq

Total: 0.00

Process Refund (Annotated with a red box) Add Refund

Once completed, press **Process refund**.

SmartBusiness - Retail

Sales Order List



SmartBusiness

- Retail
- Retail Order
- Retail Order (Advanced)
- Refunds Order
- Sales Order List**
- Day-Ends
- Customer

In the navigation bar, click **Retail > Sales Order List**.

Adding new sales order / preorder

Applying filter to the sales order list

Adding new sales order / preorder

Edit the details of the sales order

Invoice No.	Sales Person	Customer	Deposit Amt. (\$)	Status	Remark	INVOICE TIME
KL100016	KIM	GUEST	4788.00	Completed		2023-12-22 15:11:53
KL100015	KIM	Kim LEUNG	35.00	Completed		2023-12-21 11:56:35
KD100008	KIM	GUEST	0.00	Completed		2023-12-20 18:00:38
KL100008	KIM	GUEST	18516.00	Completed		2023-12-20 18:00:24
KL100007	KIM	GUEST	4788.00	Completed		2023-12-20 16:32:08
KL100006	KIM	GUEST	0.00	Completed		2023-12-20 12:56:16
KL100005	KIM	Kim LEUNG	35.00	Completed		2023-12-19 16:11:16
KL100004	KIM	Kim LEUNG	58.00	Completed		2023-12-18 17:44:35
KL100003	KIM	Kim LEUNG	35.00	Completed		2023-12-05 15:31:27

When there is new sales order, click **"Add Sales Order"** blue button on the right top corner.

When there is new pre-order, click **"Add Preorder"** orange button on the right top corner.

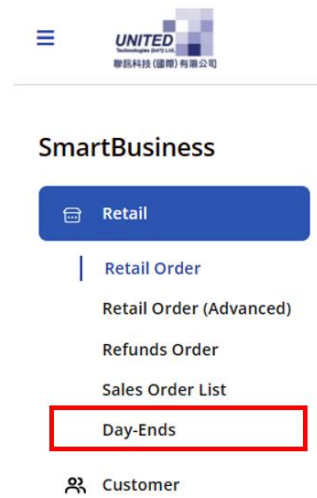
In sales order list, details of each sales order can be checked on this page:

- Invoice number
- Sales person
- Customer
- Deposit amount
- Status
- Remark
- Invoice date

Each sales order can be edited on the right hand side of each row.

SmartBusiness - Retail

Day-ends



"Day-ends" is used to settle the day's income at the end of a working day.

In the navigation bar, tap **Retail > Day-ends**.

The screenshot shows the 'Count Payments' screen. At the top, it says 'Count Payments' and 'Last Dayends Session Done: 2023-07-20 11:26:23'. Below this is a table with three columns: 'Payment Types', 'Expected Amount (\$)', and 'Actual Amount (\$)'. The table has six rows for different payment types: 現金, Visa卡, 萬事達卡, 禮券, 支付寶, and 微信. The 'Actual Amount' column for '現金' is highlighted with an orange box and contains the text 'Enter the actual amount here'. Below the table, there is a 'Count Total' section showing 'HK\$0.00'. At the bottom left, there is a 'Notes' field, and at the bottom right, there is an 'OK' button.

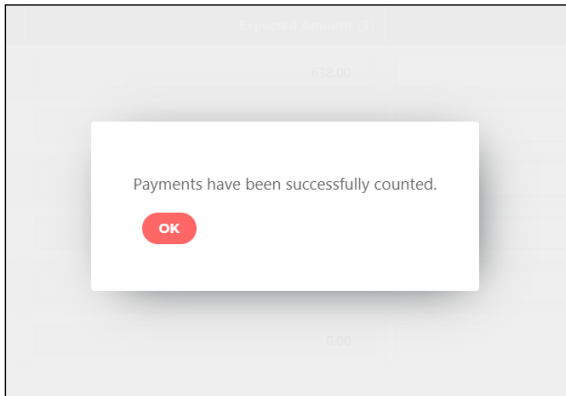
Payment Types	Expected Amount (\$)	Actual Amount (\$)
現金	638.00	Enter the actual amount here
Visa卡	0.00	0.00
萬事達卡	0.00	0.00
禮券	0.00	0.00
支付寶	0.00	0.00
微信	0.00	0.00

Count Total **HK\$0.00**

Notes **OK**

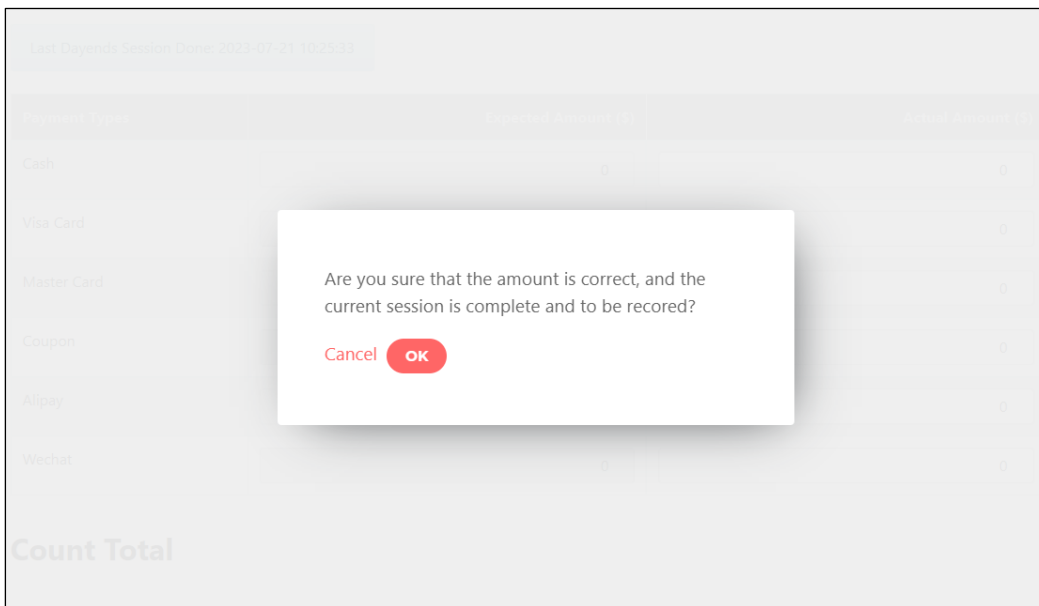
SmartBusiness - Retail

When finished, press the **OK** button.



If the settlement is successful, the system will show the message "Payments have been successfully counted".

If you press the OK button a second time, the system will confirm with the user again.



SmartBusiness - Retail

Billing-specific features

The following functions are not available until after checkout.

Billing #1 - Count Payment Summary

This feature is only available for checkout.

計算付款摘要
POS P10

開始時間：2023/6/29 上午 11:09:25
結束時間：2023/6/29 上午 11:09:31

交易摘要	
總銷售額 (\$)	0
月結 (\$)	0
總退款額 (\$)	0

付款方式	預期金額 (\$)	實際金額 (\$)	差額 (\$)
總額	0.00	0.00	0.00

列印預覽

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

The green key "**Print Preview**" is used as a preview print summary. A preview page will pop up.

SmartBusiness - Retail

Billing #2 - Count Payments Detail

This feature is only available for checkout.

計算付款明細
POS P10

開始時間: 2023/6/29 上午 11:09:25
結束時間: 2023/6/29 上午 11:09:31

日期/時間	銷售號碼	員工	付款方式	金額 (\$)
總額				0

交易摘要	金額 (\$)	付款摘要
總銷售額 (\$)	0	
月結 (\$)	0	
總退款額 (\$)	0	

列印預覽

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

The green key "**Print Preview**" is used as a preview print summary. A preview page will pop up.

Billing #3 - Session Item Sales

This feature is only available for checkout.

結算項目銷售
POS P10

開始時間 : 2023/6/29 上午 11:09:25
結束時間 : 2023/6/29 上午 11:09:31

商品代碼	描述	已售數量	金額 (\$)
	總共	0	0

Print Preview

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

The green key "**Print Preview**" is used as a preview print summary. A preview page will pop up.

SmartBusiness - Retail

Billing #4 - Deposit

The deposit form is a document used to place an order for goods to the customer and ask for the balance of delivery.

The screenshot shows the 'Deposit' form interface. At the top, there are input fields for 'Device Code' (containing 'P10'), 'Receipt No.', and 'Phone No.', along with a 'Search Receipt' button. Below these are fields for 'Customer', 'Points', 'Price Level', and another 'Phone No.'. A 'Sales History' table is visible with columns: Seq, Item Code, Qty, Price (\$), Disc.%, Amt. (\$), Sales Date, Deposit Amt. (\$), Deposit Date, and Location. On the left, there is a 'Notes' text area. On the right, there is a 'Remaining Amt. (\$)' field showing '0.00', a 'Process Payments' button, and a 'Reload' button. A copyright notice at the bottom reads: '© 2023 | SmartBusiness | Developed by United Technologies (Int'l) Ltd.'

Similar to refunds, enter the device code, receipt number, etc. in the fields above to search for receipts.

This screenshot is an annotated version of the 'Deposit' form. The 'Device Code' field (containing 'P10') is marked with a red '1'. The 'Receipt No.' field is marked with a red '2'. The 'Phone No.' field is marked with a red '3 (Optional)'. The 'Search Receipt' button is also highlighted with a red circle.

This is a close-up view of the bottom portion of the 'Deposit' form. It shows the 'Remaining Amt. (\$)' field with the value '0.00'. Below this field are two buttons: 'Process Payments' and 'Reload'. Above the 'Remaining Amt. (\$)' field, there are two columns: 'Deposit Date' and 'Location'.

After confirming the information, proceed with **Processing Payment**.

SmartBusiness - Retail

Process Remainder

After pressing **Process Payment**, the **window to process payment will pop up**.

After selecting your payment method, please click **"OK"**.

The 'Process Payments' window displays a remainder of HK\$8.00. A green box indicates 'Remaining: HK\$0.00'. Below this, there is a section for 'Monthly Pay' and a table of payment types.

Payment Types	Amount
<input checked="" type="checkbox"/> Cash	8.00
<input type="checkbox"/> Coupon	0
<input type="checkbox"/> Visa Card	0
<input type="checkbox"/> Master Card	0
<input type="checkbox"/> Alipay	0
<input type="checkbox"/> Wechat	0

Buttons for 'OK' and 'Cancel' are located at the bottom right.

Preview the print

After pressing OK, a new page will pop up,

The seller previews the printed receipt.


The receipt preview window shows a receipt for Proview Hong Kong Ltd. The receipt includes the company name, address, and contact information. The receipt details are as follows:

Item	Qty	Price	Disc%	Tax%	Amount
T0003					
澳洲M4和牛肉眼(急凍-18°C)	1	\$208.00	-	0.00	\$208.00
SubTotal					\$208.00
Total					\$208.00
Deposit Paid					\$200.00

The preview window also includes a 'Print' panel on the right with options for destination, pages, and margins.

Customer

Customer Management


 Customer

Customer Management

Point Level

Add Customer

Enquiry

 Items

"Customer Management" allows you to view the list of existing customers.


In the navigation bar, click **Customer > Customer Management**.

Customer

Please enter a keyword.

Name	Contact	Email	Created Time	FollowUp Date	
GUEST	Walk-in	guest@united.com.hk	2023-07-14 15:06:44	N/A	<input type="button" value="Edit"/> <input type="button" value="FollowUp"/> <input type="button" value="Remove"/>
2H Company Limited	Ms Rebecca LO	rebecca@2hc.com	2023-07-14 15:06:44	N/A	<input type="button" value="Edit"/> <input type="button" value="FollowUp"/> <input type="button" value="Remove"/>
NoBo Company Limited	Ms Lisa YEUNG	nobold@gmail.com	2023-07-14 15:06:44	N/A	<input type="button" value="Edit"/> <input type="button" value="FollowUp"/> <input type="button" value="Remove"/>
香港優質進出口有限公司	張先生	info@hkimportexport.com	2023-07-14 15:06:44	N/A	<input type="button" value="Edit"/> <input type="button" value="FollowUp"/> <input type="button" value="Remove"/>
Reliant Ltd.	Ms Alice LO	alice@reliantltd.com	2023-07-14 15:06:44	N/A	<input type="button" value="Edit"/> <input type="button" value="FollowUp"/> <input type="button" value="Remove"/>
ALL FOR GOD INT'L CO	SHEFCO	N/A	2023-07-14 15:06:44	N/A	<input type="button" value="Edit"/> <input type="button" value="FollowUp"/> <input type="button" value="Remove"/>

Note: If you need to add new customers, please add them in ABSS first, and import the new customers to SB in **Data Integration > ABSS to SB**.

 Data Integration

ABSS To SB

SB To ABSS



Click here to import customers from ABSS

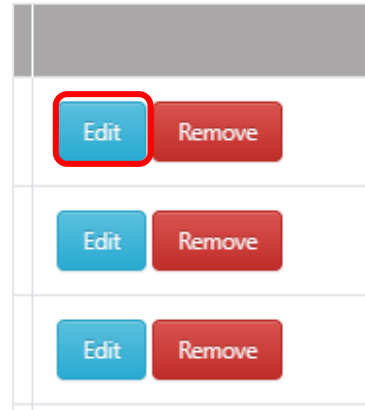
ABSS To SB

© 2023 | SmartBusiness | Developed by United Technologies

SmartBusiness - Customers

Edit Customer Information

Press **Edit** to make modifications to the customer data.



Edit the page

Required fields (*) are name, phone number and contact person.

Edit Customer

Fields marked with asterisk (*) are mandatory.

Payment is Due

▼

Balance Due Days

Name*

(Maximum character length: 50)
The name is not modifiable if the Customer has already been uploaded to ABSS.

Phone*

Contact*

Email

City

Country

▼

Website

Points

Address1

Address2

Address3

Address4

SmartBusiness - Customers

Phone 1

WhatsApp

Phone 2

WhatsApp

Phone 3

WhatsApp

Last Selling Price


Upload File

View File

Attribute

FollowUp Status Need FollowUp No Need FollowUp Completed

FollowUp Date

 2023-08-14

FollowUp Records +

test 999 Last edited by Manager at 2023-08-09 15:43:50	test 887 Last edited by Manager at 2023-08-08 16:35:59	test 7 Last edited by Manager at 2023-08-08 14:44:28
test 6 Last edited by Manager at 2023-08-08 14:41:20	test 5 Last edited by Manager at 2023-08-08 14:38:13	test 4 Last edited by Manager at 2023-08-08 14:21:22
test3333 Last edited by Manager at 2023-08-08 14:16:39	test 2 Last edited by Manager at 2023-08-08 14:14:21	test 1 Last edited by Manager at 2023-08-08 14:12:50

Save

[Back To List](#)

© 2023 | SmartBusiness | Developed by United Technologies (Int'l) Ltd.

SB and ABSS corresponding fields:

SmartBusiness - Customers

Information	SB	ABSS (Chinese/English)
Company name	Name	名稱/Name
Phone	Phone	電話 #1/Phone#1
Phone 2	Phone 2	電話 #2/Phone#2
Phone 3	Phone 3	電話 #3/Phone#3
Contact name	Contact	聯絡人/Contact
Email	Email	電郵/Email
Address	Address	地址/Address
Website	Website	網址/Website

SmartBusiness - Customers

Note-taking functions

Using 'Upload file', 'Attribute' and 'FollowUp' functions allows you to take care of customers' need effectively. You can easily view different information of customers with the three functions at any time:

With 'Upload file', you can upload photos provided by a customer, or a document signed with the customer;

With 'Attribute', you can save detail information of customers for follow-up;

With 'FollowUp', you can record request from customers, and select the date to follow up.

Upload File

Number of files uploaded is unlimited, with each file at most 50MB.

Choose 'Upload File' button to upload the files.

The screenshot displays the SmartBusiness Customer profile interface. At the top, there is a navigation bar with menu items: Promotion, WholeSales, Purchase, Data Integration, Report, and Setup. The main form area includes several input fields for 'Address2', 'Address3', and 'Address4'. Below these are three phone number fields labeled 'Phone 1', 'Phone 2', and 'Phone 3', each with a 'WhatsApp' link. A checkbox for 'Last Selling Price' is present. The 'Upload File' button is highlighted with a red box, and a red arrow points from it to the 'Attribute' section. A modal dialog titled 'Upload File' is open, showing 'Choose File' and 'Upload' buttons. The 'Attribute' section contains a text input field with the value 'Attribute'. Below this is the 'FollowUp Status' section with radio buttons for 'Need FollowUp' (selected), 'No Need FollowUp', and 'Completed'. The 'FollowUp Date' section has a date picker set to '2023-08-14'. At the bottom, there is a 'FollowUp Records +' section with a 'Save' button and a 'Back To List' link. The footer contains the copyright notice: '© 2023 | SmartBusiness | Developed by United Technologies (Int'l) Ltd.'

SmartBusiness - Customers

To read the files, press 'View File'.

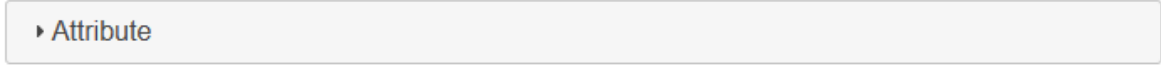
The screenshot shows a customer profile page in the SmartBusiness system. The page includes a navigation bar with options like 'Promotion', 'WholeSales', 'Purchase', 'Data Integration', 'Report', and 'Setup'. The main content area contains several input fields for 'Address2', 'Address3', and 'Address4', and three 'Phone' fields (Phone 1, Phone 2, Phone 3). There are also 'WhatsApp' links and a 'Last Selling Price' checkbox. A 'View File' button is highlighted in blue. A modal window titled 'View File' is open in the center, displaying a document with a large red 'SPECIMEN' watermark. The modal has a 'Close' button at the bottom right. Below the modal, there are 'FollowUp Status' radio buttons (selected: 'Need FollowUp'), a 'FollowUp Date' calendar showing '2023-08-14', and a 'FollowUp Records +' section with a 'Save' button. A 'Back To List' link is at the bottom left. The footer contains the copyright notice: '© 2023 | SmartBusiness | Developed by United Technologies (Int'l) Ltd.'

After finishing uploading file, it is **unnecessary** to click 'Save'.

SmartBusiness - Customers

Attribute

Default to be collapsed, click the "► Attribute" bar to expand.



Attribute has two columns of 'Text' and one column of 'DropDown Box', while each column has 10 boxes.

Each 'Text' box is allowed to input single text description (field), and each 'DropDown Box' is allowed to input multiple fields.

In addition, any other information that is not contained at the attribute boxes above can be recorded by the function 'Custom Attribute'.

After finishing the edit of attribute, click [Save Attribute](#).

Navigation: Motion ▾ WholeSales ▾ Purchase ▾ Data Integration ▾ Report ▾ Setup ▾

► Attribute

Text	Text	DropDown Box
I.T. Support Model I.T. Support Model	Fiscal Month Fiscal Month	MYOB reseller M Consulting Lobster Mission 4 Company
PC OS PC OS	Number of I.T. Staff Number of I.T. Staff	Myob Version 22.3 ABSS ABSS Premier v20 Int'l Ver ABE
Number of Servers Number of Servers	No. of Staff No. of Staff	Location ERP Multiable
Number of PCs Number of PCs	MS Online Service Anniversary Date (If Applicable) MS Online Service Anniversary Date (If Appli	Locality ERP Multiable
Preferred Printer/Copier Brand Preferred Printer/Copier Brand	Firewall Systems Firewall Systems	Industry VR Bit Com abc Accounting Services Acc
Job Title Job Title	MYOB Maintenance MYOB Maintenance	Customer ERP Multiable
Source Source	Marketing Tools (if any) Marketing Tools (if any)	Account Software (Upgrade to Premier Plus v13 from UT) ,CU!
Preferred Server Hardware Brand Preferred Server Hardware Brand	MYOB Reseller MYOB Reseller	Antivirus Software Cisco free AVG Free Bundled with Lenovo
Preferred PC Hardware Brand Preferred PC Hardware Brand	Email System Email System	Server OS APP DNS Hosted @Network Solution HPX/
Headquarter Headquarter	Banker Banker	Mobile ERP Multiable

Custom Attribute

Extra services required ✕ Using SmartBusiness ✕

Save Attribute

SmartBusiness - Customers

Input the information into the corresponding boxes.

Text

Fiscal Month

Fiscal Month

Number of I.T. Staff

15

Double-click the title of corresponding boxes to edit it.

Text

Fiscal Month

Fiscal Month

Number of I.T. Staff

Text


Fiscal Month

Number of I.T. Staff

If you need to input multiple fields, click  on the right of one 'DropDown Box'.


DropDown Box

MYOB reseller

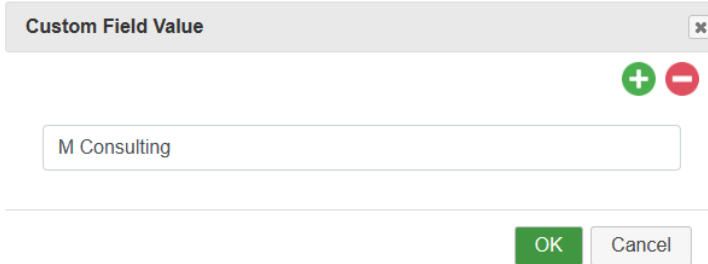
M Consulting||Lobster 

Myob Version

SmartBusiness - Customers

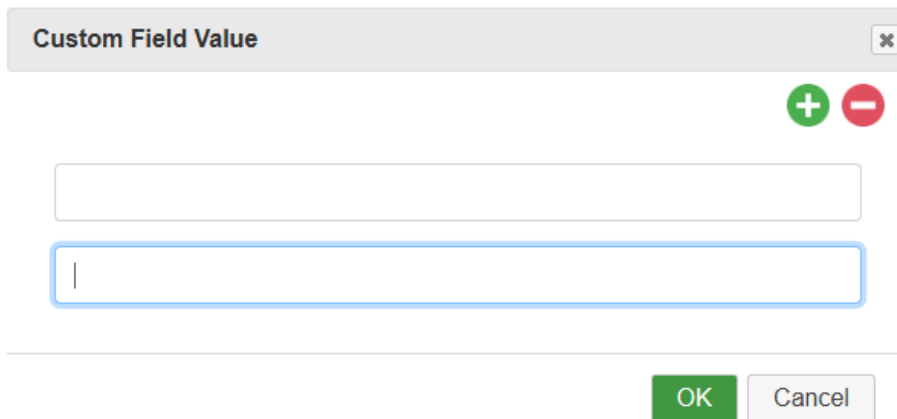
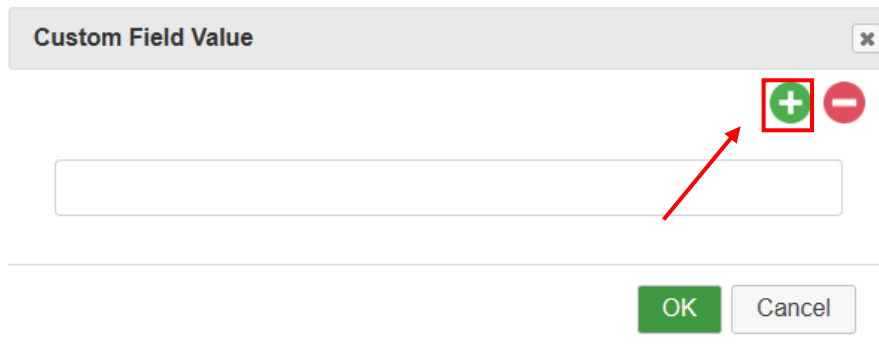
A window 'Custom Field Value' will pop up after clicking . Input the information into the corresponding boxes.

Click 'OK' confirm. Click 'Cancel' give up changes.




Select  to add a field. Select  to delete the last field.



Add 



SmartBusiness - Customers

Delete 


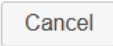
Custom Field Value 


1



2

3


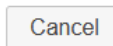


Custom Field Value 

1

2

SmartBusiness - Customers

Also, you can also directly delete all the words in the field to delete it.

Mobile

1||2||3||4



Custom Field Value

+ -

1

2

3

4

OK Cancel



Custom Field Value


+ -

1


2

4

OK Cancel



Save Attribute



Mobile

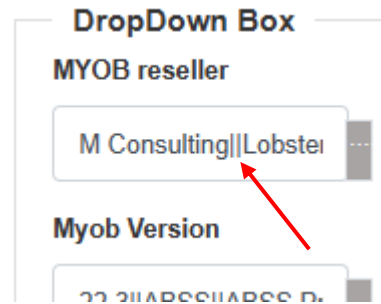
1||2||4



SmartBusiness - Customers

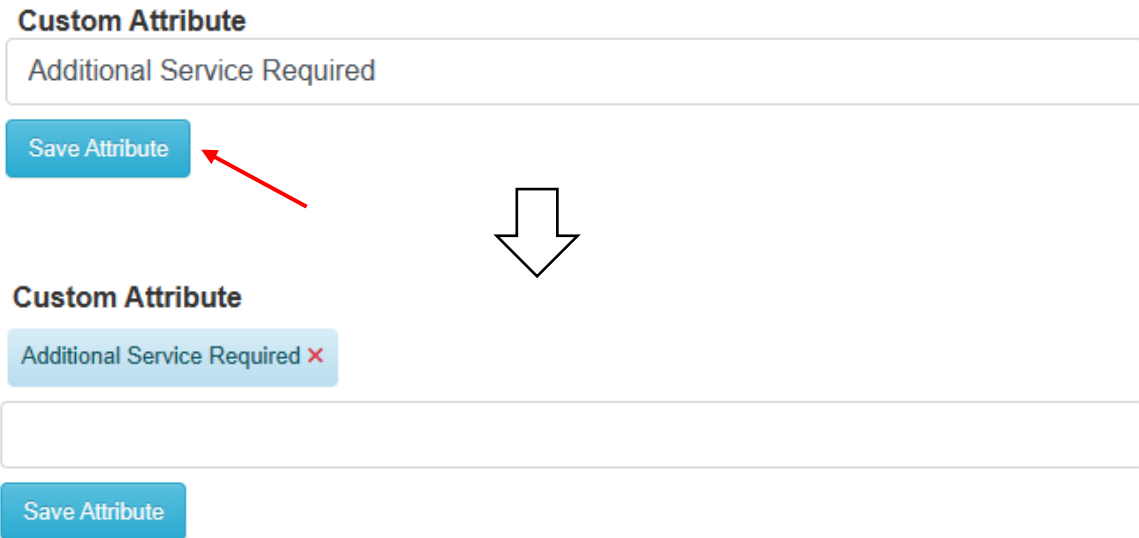
After inputting multiple fields in a DropDown Box, you will see each field is separated by || in the single DropDown Box field.

You can directly edit the single field with adding || to separate each field under the DropDown box.

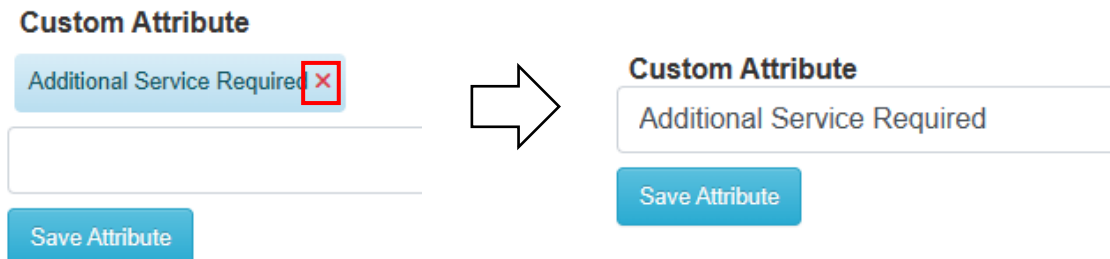


Custom Attribute

Enter any text in the field as an additional attribute. Click **Save Attribute** when finished.



Click the corresponding **X** to delete the custom attribute. It is unnecessary to click



SmartBusiness - Customers

FollowUp

Divided into 3 parts: 'FollowUp status', 'FollowUp date' and 'FollowUp Records'.

FollowUp status

Select one of the three options for the customer's follow-up status:

FollowUp Status Need FollowUp No Need FollowUp Completed

FollowUp Date

Click the calendar box to select a follow-up date if *a follow-up is required* (selected in FollowUp status).

Click **⏪** and **⏩** to switch between months. Then click the follow-up date.
Default date is today (day of the operation).

FollowUp Date

2023-08-14

⏪ August 2023 ⏩

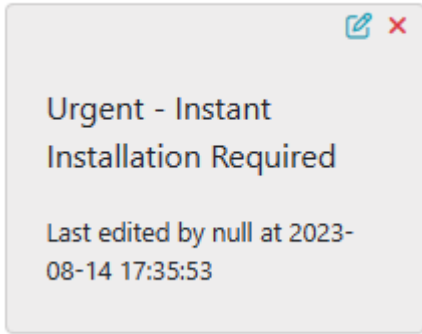
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

After finishing the setting of FollowUp status and/or FollowUp Date, click .

FollowUp Records

Click + to create some brief summaries of a follow-up.

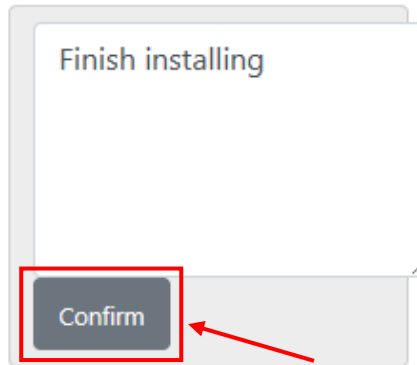
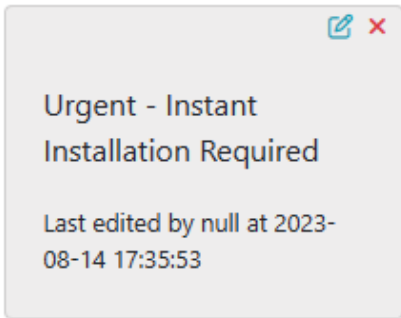
FollowUp Records **+**



A new box will appear next to the last of the current record.

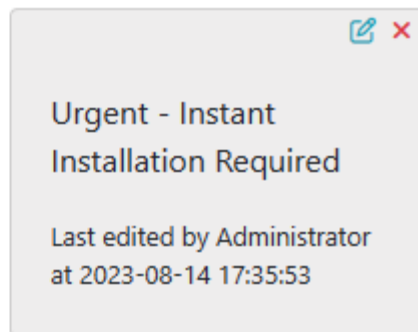
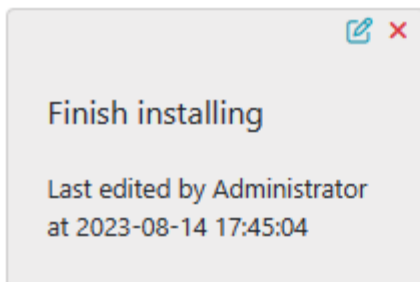
Click 'Confirm' after inputting the information.

FollowUp Records **+**



The new record will appear in the top left corner (i.e. the records are arranged in reverse order). The add/edit time will be shown below the text of the record, as long as the name of the operator.



FollowUp Records **+**





SmartBusiness - Customers

Click  to edit.

FollowUp Records +


 

Last edited by Administrator
at 2023-08-14 17:45:04



 
Urgent - Instant
Installation Required

Last edited by Administrator
at 2023-08-14 17:35:53



Click **any blank spaces** on the page to save the record after editing. It is unnecessary to click

 after the end of the operation.

FollowUp Records +


 

Last edited by null at 2023-08-14 17:58:49

 
Urgent - Instant
Installation Required



Last edited by Administrator
at 2023-08-14 17:35:53





 (blank space)



FollowUp Records +

 
Finish installing ABSS
Add-ons

Last edited by Administrator
at 2023-08-14 17:58:49

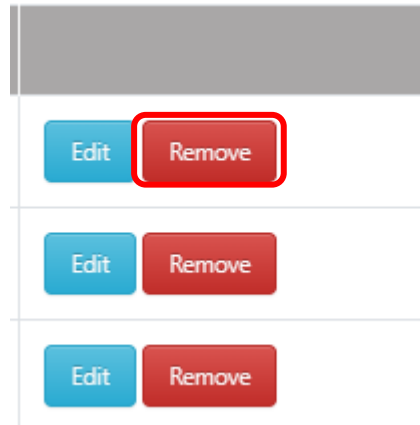
 
Urgent - Instant
Installation Required

Last edited by Administrator
at 2023-08-14 17:35:53

SmartBusiness - Customers

Remove Customer

Press **Remove** to remove a customer.




Preview Customer Information

Including Name, Contact, Email, Custom Attributes, Created Time, FollowUp Status and FollowUp Date.


Click any grey boxes (except Custom Attributes) to sort its corresponding information. For example, if you click 'Name', its column will be accordingly sorted by number, alphabetically and by Chinese strokes, etc.

The first click is sorting by ascending order (description will become '▲NAME'), and the second click is sorting by descending order (description will become '▼NAME').




Name	Contact	Email	Custom Attributes	Created Time	FollowUp Status	▼ FOLLOWUP DATE		
T.L60 Management Limited				2023-08-07 14:09:12	Need	2023-09-30	Edit	Remove
Freemason				2023-08-10 14:47:48	Need	2023-08-10	Edit	Remove
Random Company LTD				2023-08-10 14:47:48	N/A	N/A	Edit	Remove

Ascending Order



▲ NAME	Contact	Email	Custom Attributes	Created Time	FollowUp Status	FollowUp Date		
2H Company Limited				2023-08-10 14:47:48	N/A	N/A	Edit	Remove
ALL FOR GOD				2023-08-10 14:47:48	N/A	N/A	Edit	Remove
ALL FOR GOD INT'L CO				2023-08-10 14:47:48	N/A	N/A	Edit	Remove
Bing Chiling Co. Ltd.				2023-08-10 14:47:48	N/A	N/A	Edit	Remove

SmartBusiness - Customers

Descending Order 

NAME	Contact	Email	Custom Attributes	Created Time	FollowUp Status	FollowUp Date	
香港優質進出口有限公司			需要額外服務	2023-08-10 14:47:48	N/A	N/A	Edit Remove
某某有限公司				2023-08-10 14:47:48	N/A	N/A	Edit Remove
YT Company Limited			Extra services required Using SmartBusiness	2023-08-10 14:47:48	N/A	N/A	Edit Remove
Ying Wah Holdings Limited				2023-08-10 14:47:48	N/A	N/A	Edit Remove

Search bar

Enter the customers' keywords to search, such as Name, Contact, FollowUp Records and Custom Attributes. Key in keywords and click **Search**. To view all customers, click **Reload**.

[Search](#) [Reload](#) [Advanced Search](#) [Add Contacts to eBlast](#)

Advanced Search

If searching for attributes (including text, DropDown Box and Custom Attribute) and FollowUp Date, click **Advanced Search**. Click the left drop-down list to select the title of a box under Attribute for searching.

Advanced Search ✕

[+](#) [-](#)

[OK](#) [Cancel](#)

1 Left drop-down list:
Select the title of a box under Attribute

2 Central drop-down list:
Select a condition of the keywords

3 Right boxes:
Type in keywords

SmartBusiness - Customers



10 14:47:48	N/A	N/A
10 14:47:48	N/A	N/A
10 14:47:48	N/A	N/A

Hint: FollowUp Date, GiveUp Date and Complete Date corresponds to the following FollowUp Status: 'Need FollowUp', 'No Need FollowUp' and 'Completed'.

Next, click the central drop-down list to select a condition of the keywords.

1 Left drop-down list:
Select the title of a box under Attribute

2 Central drop-down list:
Select a condition of the keywords

3 Right boxes:
Type in keywords

Equals =, Not Equals !=

ALL characters of the corresponding boxes under the search result are **the same/not the same** as the keywords in the right boxes.

SmartBusiness - Customers

>, >=, <, <=

Greater than, greater or equal to, smaller than, smaller or equal to

Those conditions are usually used for number boxes. For example, 'Number of PCs < 5' means the searched customers have less than 5 PCs; 'Myob version >= 22.3' means the searched customers' Myob version is 22.3 or newer.

Contains, Not Contains

SOME or ALL characters of the corresponding boxes under the search result are **the same/not the same** as the keywords in the right boxes.

Lastly, type in keywords on the right box, and click **OK** to search.

The screenshot shows the 'Advanced Search' dialog box. It contains a table with three columns: 'Attribute', 'Condition', and 'Keywords'. The first row is filled with 'Myob Version', '>=', and '22.3'. To the right of the table are '+' and '-' buttons. Below the table, there are three numbered annotations: '1 Left drop-down list: Select the title of a box under Attribute', '2 Central drop-down list: Select a condition of the keywords', and '3 Right boxes: Type in keywords'. At the bottom right, there are 'OK' and 'Cancel' buttons. A red arrow points to the '22.3' text box, and another red arrow points to the 'OK' button.

Attribute	Condition	Keywords
Myob Version	>=	22.3

1 Left drop-down list: Select the title of a box under Attribute

2 Central drop-down list: Select a condition of the keywords

3 Right boxes: Type in keywords

OK Cancel

If you want to perform a more detailed searching by adding more keywords, or setting a range (e.g. 20.0 <= Myob Version <= 23.9), you can add one more searching row to type in.

Click **+** to add a searching row to the last row of the list.

Click **-** to delete a searching row (not allowed if there is only one row).

Add **+**

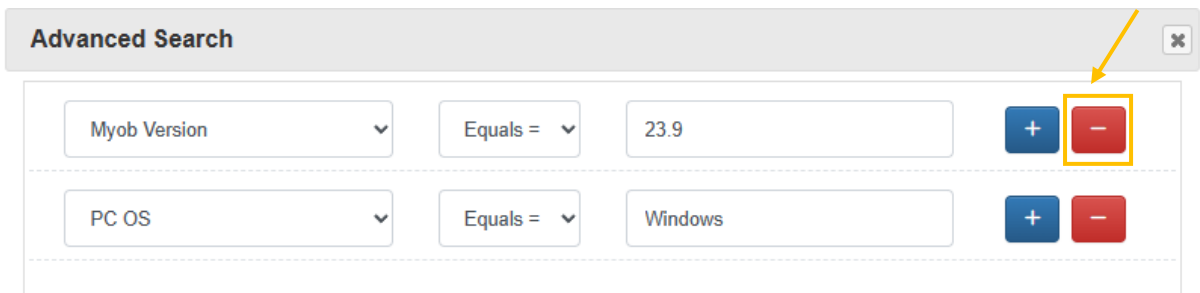
The screenshot shows the 'Advanced Search' dialog box with two rows. The first row is 'Myob Version' with condition '>=' and keyword '22.3'. The second row is 'I.T. Support Model' with condition 'Equals =' and keyword '22.3'. The '+' and '-' buttons are highlighted with a yellow box and a blue arrow. A large orange arrow points from the '+' button to the second row. At the bottom, there are 'OK' and 'Cancel' buttons.


Attribute	Condition	Keywords
Myob Version	>=	22.3
I.T. Support Model	Equals =	22.3





OK Cancel

SmartBusiness - Customers

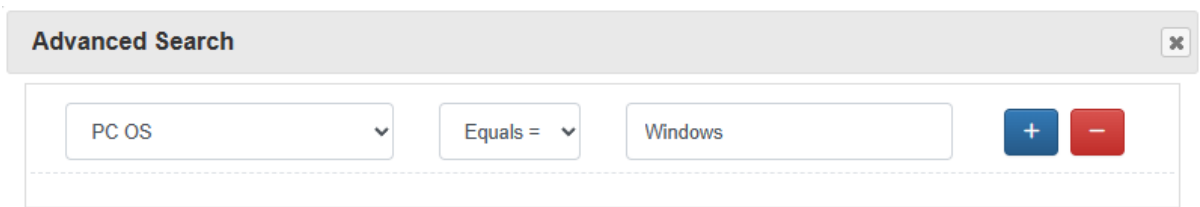
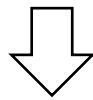
Delete 






Advanced Search 

Myob Version	Equals =	23.9		
PC OS	Equals =	Windows		



Advanced Search 

PC OS	Equals =	Windows		
-------	----------	---------	--	--




 

Setting a Range

Add a searching row and select the same title of the box. Then change the keyword and condition accordingly. For example, for '20.0 <= Myob version <= 23.9':



Advanced Search 

Myob Version	>=	20.0		
Myob Version	<=	23.9		

SmartBusiness - Customers

Add Contacts to eBlast

Click [Add Contacts to eBlast](#) to add customers into the contact list of eBlast.

End page

1

[Open Customer Point Action Log](#)

© 2023 | SmartBusiness | Developed by United Technologies (Int'l) Ltd.

Click the number to go to other pages for more records.

Press 'Open Customer Point Action Log' to pop up the update record of customers' points, including update operator (represented by User Code), Action Type (like Edit), Customer Phone, Old Value, New Value and update time.

Action History ✕					
USER CODE	Action Type	Customer Phone	Old Value	New Value	Date Time
superadmin	Edit		4196	0	4/21/2023 2:42:23 PM
sales05	Edit		0	5000	5/2/2023 12:38:45 PM
manager01	Edit			0	8/10/2023 5:37:01 PM

1

Close

SmartBusiness - Customers

Point Level

 Customer

Customer Management

Point Level

Add Customer

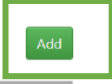
Enquiry















 Items

"Point Level" modifies the company's customer performance level.

In the navigation bar, click **Customer > Points Level**.

Price Level

New Level 

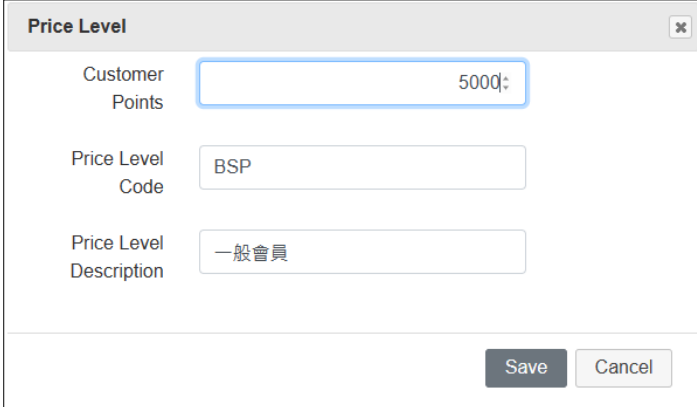
Customer Points	Price Level Code	Price Level Description	
5000	BSP	一般會員	Edit level   Remove level
12000	PLA	銅級會員	 
30000	PLB	銀級會員	 
80000	PLC	白鑽會員	 
200000	PLD	藍鑽會員	 
500000	PLE	紅鑽會員	 
1000000	PLF	貴賓級別	 

© 2023 | SmartBusiness | Developed by United Technologies (Int'l) Ltd.

SmartBusiness - Customers

New price tiers

Press the green button at the top right to **add** a new price tier.



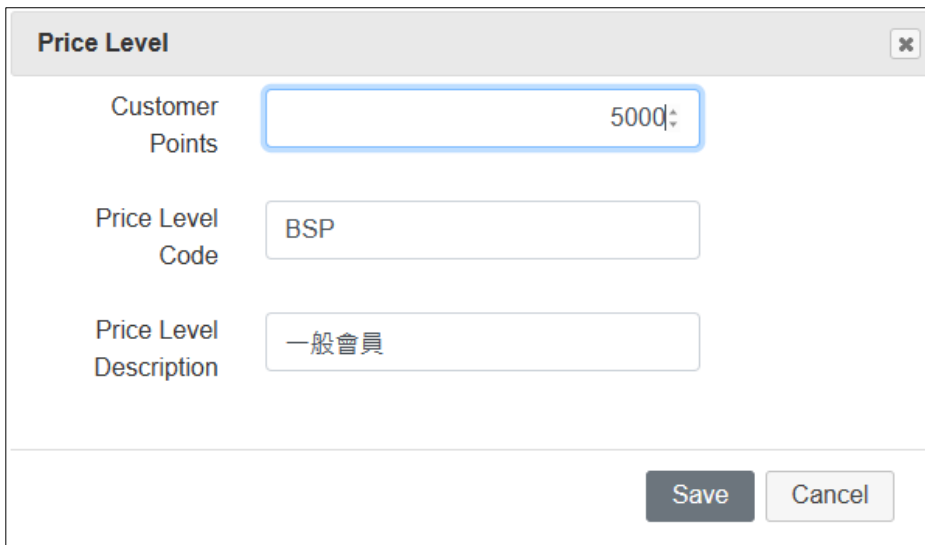
A dialog box titled "Price Level" with a close button (X) in the top right corner. It contains three input fields: "Customer Points" with the value "5000", "Price Level Code" with the value "BSP", and "Price Level Description" with the value "一般會員". At the bottom right, there are two buttons: "Save" and "Cancel".

After completing the level setting, click **"Save"**.

Edit the price level

In the level table, press the blue button Edit to the right of the item you want to edit to **edit** the price level.

Customer Points	Price Level Code	Price Level Description	
5000	BSP	一般會員	Edit Remove




A dialog box titled "Price Level" with a close button (X) in the top right corner. It contains three input fields: "Customer Points" with the value "5000", "Price Level Code" with the value "BSP", and "Price Level Description" with the value "一般會員". At the bottom right, there are two buttons: "Save" and "Cancel".

After editing the level, click **"Save"**.

SmartBusiness - Customers

Add Customer


 Customer

Customer Management

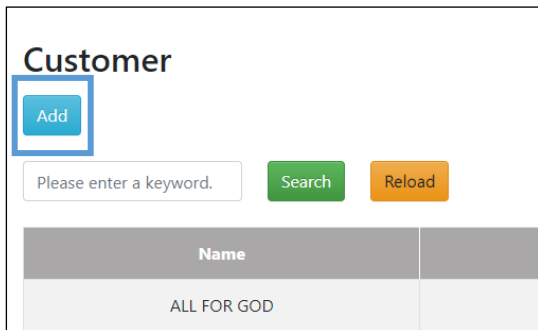
Point Level

Add Customer

Enquiry

 Items

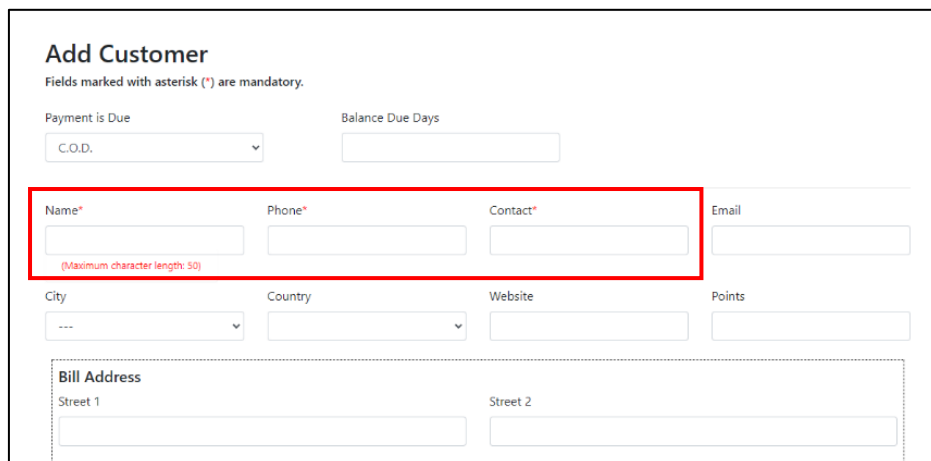
In the navigation bar, click **Customers > Add Customer**.



Press the blue button in the top left to **add a** new customer.

The following is a new customer interface, you must enter the customer name, phone number, contact person (*).

Required

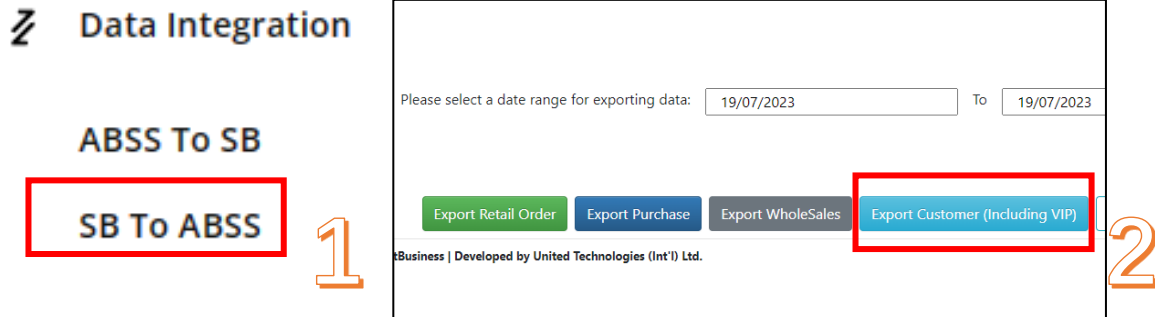


When finished, click **"Save"**.

SmartBusiness - Customers

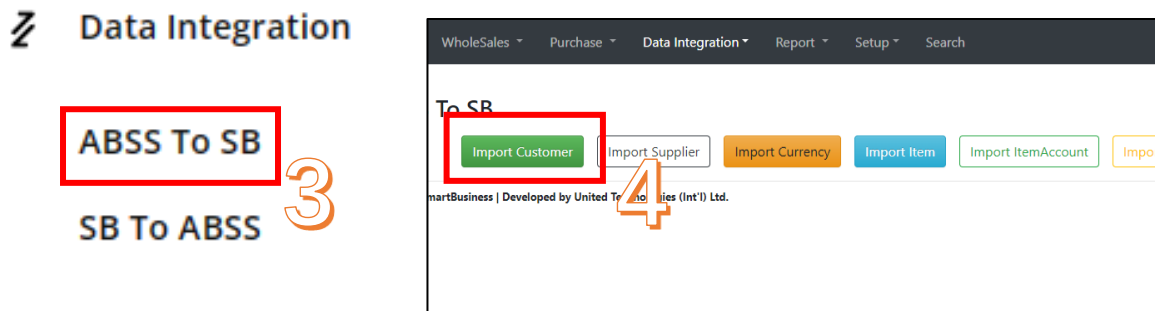
*After adding customers to SB, please import customer data into ABSS for storage.

Click **“Data Integration” > “SB to ABSS”** from the navigation bar to import customer data.




*After successfully importing to ABSS, please update the ABSS data to SB again.

Click **“Data Integration” > “ABSS to SB”** from the navigation bar to import customer data.



SmartBusiness - Customers

Enquiry

 Customer

Customer Management

Point Level

Add Customer

Enquiry

 Items

In the navigation bar, click **Customer > Enquiry**.

If a customer fills in information online to make various enquiries to the company, the information of the customer's enquiry will be stored in the enquiry to arrange for the company to assign colleagues for follow up.

↑When you first enter the "Enquiry" page, the enquiry form will be blank.

User needs to sign in to display query customers:

SmartBusiness - Customers

After logging in, the page will display all queries.

DateTime	Subject	Name	Email	Phone	Organization	Contact	
2023-07-11 14:29:50							
2023-07-10 17:22:18		COMPANY LIMITED			LIMITED		
2023-07-10 10:34:32		Limtied					
2023-07-10 09:01:43							
2023-07-08 10:27:44							
2023-07-08 09:25:22							
2023-07-07 18:51:00							
2023-07-07 12:22:21							

Search Queries

To search for queries with different dates, enter the date range in the search bar above and click "Send". To view all queries, click "Reload".

Enquiry

Enter date range

Assign Enquiries to Salesman

From To

2023-07-16 To 2023-08-15
Total Records: 33

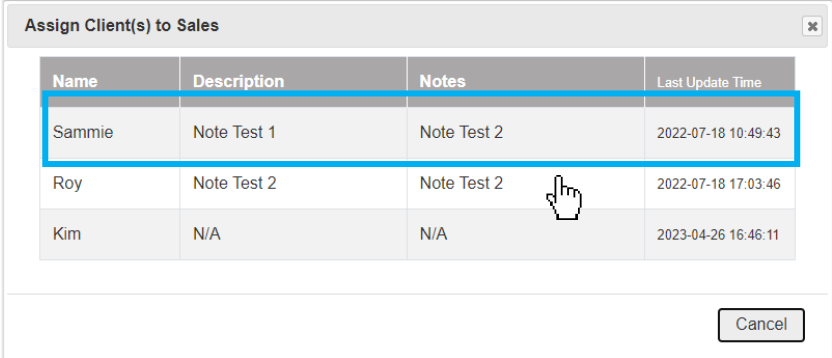
Assign to Salesman

If you need to assign someone to follow up on the enquiry, you can press the **square avatar button** on the right.

SmartBusiness - Customers

A pop-up window will be displayed for you to select the person to assign.

Click the desired staff to assign.

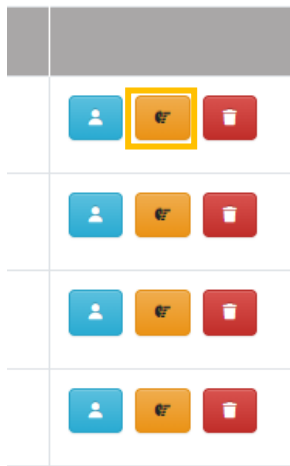


The image shows a pop-up window titled "Assign Client(s) to Sales". It contains a table with the following data:

Name	Description	Notes	Last Update Time
Sammie	Note Test 1	Note Test 2	2022-07-18 10:49:43
Roy	Note Test 2	Note Test 2	2022-07-18 17:03:46
Kim	N/A	N/A	2023-04-26 16:46:11

A mouse cursor is pointing at the "Notes" column of the second row (Roy). A "Cancel" button is located at the bottom right of the window.

Convert to Customer

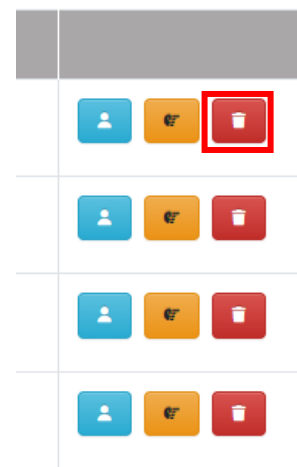


If the customer enquiring is not any current customer in the SB system (i.e. the customer is not under **Customer Management**, such as a new customer), click the **square pointing button** on the right to add him/her into the list of current customers.

Other information from the enquiry, for instance, organization, email address, phone and FollowUp Records, will sync to the database of current customers at the same time.


Remove Enquiry

Click **trash bin button** and confirm to delete the enquiry.



SmartBusiness - Customers

Manual Add Enquiry



Click  to enter the page of 'Add Enquiry'.

Enquiry

From  2023-07-16 To  2023-08-15  



2023-07-16 To 2023-08-15
Total Records: 33

 Enquiry 

<input type="checkbox"/>	DateTime	Subject	From	Email	Phone	Organization	Contact	FollowUp Status	FollowUp Date	Sale Per
--------------------------	----------	---------	------	-------	-------	--------------	---------	-----------------	---------------	----------

Enter the enquiry information.

Regarding the FollowUp function, please refer to above description on [Note-taking functions at 'Edit Customer'](#).


Click **Save** when finished.

Promotion ▾ WholeSales ▾ Purchase ▾ Data Integration ▾ Report ▾ Setup ▾


Edit Enquiry

From*	<input type="text"/>	Email*	<input type="text"/>
Subject*	<input type="text"/>	Phone*	<input type="text"/>
Organization*	<input type="text"/>	Mobile	<input type="text"/>
Contact*	<input type="text"/>	Note	<input type="text"/>

FollowUp Status Need FollowUp No Need FollowUp Completed

FollowUp Date
 2023-08-15

FollowUp Records +



[Back To List](#)

SmartBusiness - Customers

Edit Enquiry

You can either

Double-click anywhere in the enquiry row you would like to edit.

or

Click the blue link under 'From' in the enquiry row.







<input type="checkbox"/>	DateTime	Subject	From	Email	Phone	Organization	Contact	FollowUp Status	FollowUp Date	Sales Person
<input checked="" type="checkbox"/>	2023-08-03 15:37:01	test1	test1	enqtest1@test.com	1234252151253	enqTest1	enqTest1	Need	2023-08-10	N/A

Click the link




Double click anywhere

Colour Label

Enquiries with the yellow background are the enquiries required to follow up today (day of the operation).

<input type="checkbox"/>	DateTime	Subject	From	Email	Phone	Organization	Contact	FollowUp Status	FollowUp Date	Sales Person	
<input type="checkbox"/>	2023-08-17 11:48:06							Need	2023-08-17	N/A	  
<input type="checkbox"/>	2023-08-15 10:26:22							Need	2023-08-15	N/A	  

For the enquiries with the green background, 'Convert to Customer' function has been applied to those enquiries. Hence, deletion and assignment of salesperson of those enquiries are not allowed. However, edit of enquiries is still acceptable.

<input checked="" type="checkbox"/>	2023-07-24 10:21:12							Need	2023-07-24	Kim	  
-------------------------------------	---------------------	--	--	--	--	--	--	------	------------	-----	---

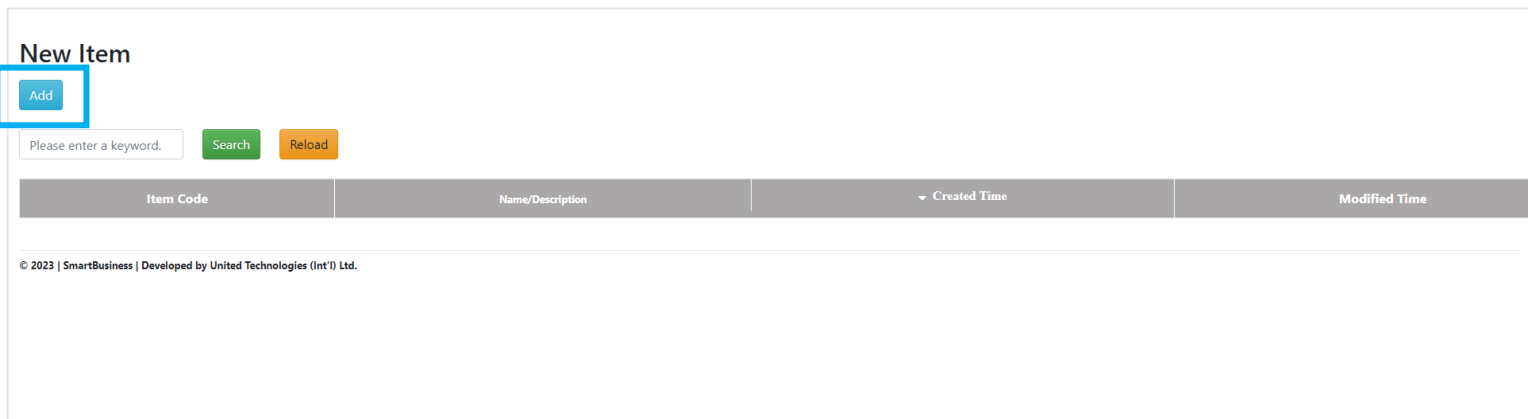
Items

New Item

- Customer
- Items
 - New Item**
 - Stock
 - Stock Transfer
 - Stock Transfer Order
 - Category
 - Out-Of-Stock Items
- Promotion

In the navigation bar, click "Items" > "New Item".

Click "Add" to add a new product.



Enter the product's code, foreign code, product name (cannot be repeated), category and description.

The 'Add Item' form includes a note: 'Item Variations are for ABS items with attributes only.' The form fields are: Category (dropdown menu set to 'Uncategorized'), Item Code (SKU) (input field with '(Maximum character length: 30)'), External Code (input field with '(Maximum character length: 30)'), Item Name (input field with '(Maximum character length: 30)'), Base Selling Price (\$) (input field with '0'), Cost for Purchase (\$) (input field with '0'), Item Price Level (input field with '0'), and Description (input field with '(Maximum character length: 30)'). At the bottom, there are input fields for Weight (kg), Width (m), and Height (m), all with '0' entered. A 'Current Char. Count:' section includes a checkbox for 'Replacing Item Name on Receipt Length (m)'.

On the page, you can select the price level, as well as other characteristics of the product.

SmartBusiness – Item

You can also enter stock quantities for different warehouses:

Inventory Qty.

Note: The opening balance quantity of newly created goods is defaulted to zero, please change the inventory quantity through Purchase/Inventory Adjustment/ABSS Download

Buy/Sell Base Units

ItemAccount

I Buy This Item

Cost of Sales Account

Cost Of Sales

Account No. 5-1000

I Sell This Item

Income Account for Tracking Sales

Income

Account No. 4-1000

I Inventory This Item

Asset Account for Item Inventory

Asset

Account No. 1-3000

Copy From...

This group of settings are irreversible upon saving.

Batch Serial No. Expiry Date

Custom Attributes

+

Active

ItemAccount

I Buy This Item

Cost of Sales Account

Cost Of Sales

Account No. 5-1000

I Sell This Item

Income Account for Tracking Sales

Income

Account No. 4-1000

I Inventory This Item

Asset Account for Item Inventory

Asset

Account No. 1-3000

Copy From...

SmartBusiness – Item

Link the product account in ABSS, you can click **"Copy from..."** to apply the account settings of other products in ABSS.

After the product is added, you will see the new product information on the original screen.

Item Code	Item Name	Qty	Unit Price (\$)	Batch	Serial No.	Expiry Date
ADSSP22.6.1.U	ADSS Premier v22.6 with 1 User License	05	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ABSSP103.1.U	ABSS Premier Plus v23.0 w	09	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ABSSP103.3.U	ABSS Premier Plus v23.0 w	03	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ABSSP22.6.3.U	MYOB Premier v22.6 with 3 Users License	51	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ABSSV23.0	ABSS Accounting v23.0	45	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BC002	Microsoft Dynamics 365 F&E	0	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

↓ Selecting the options in the yellow box as needed indicates that the item will include the following in the purchase list.

This group of settings are irreversible upon saving.

Batch Serial No. Expiry Date

- Batch
- Serial number
- Expiry date

When you add a new product, the new product will appear in the page table.

商品代碼	名稱/描述	創建時間	修改時間	
333	UT.exe	2023-07-21 15:32:06	2023-07-21 15:32:06	編輯 商品變化 移除

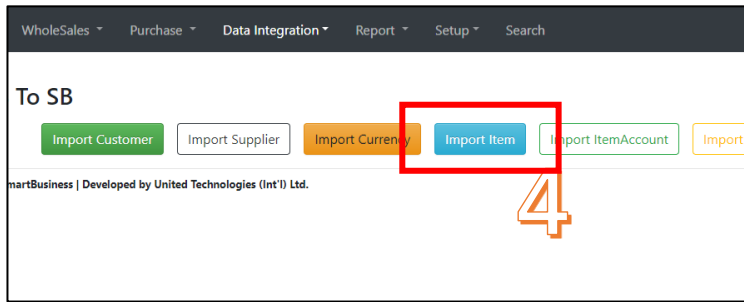
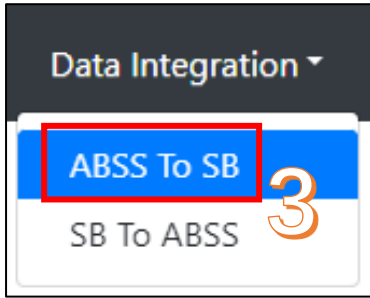
***After adding items to SB, please import item data into ABSS for storage.**

1

2


***After successfully importing to ABSS, please update the ABSS data to SB again.**

SmartBusiness – Item



Stock

 Customer

 Items

New Item

Stock

Stock Transfer

Stock Transfer Order

Category

Out-Of-Stock Items

 Promotion

In the navigation bar, click **Items** > **Stock**.

SmartBusiness – Item

Edit

Stock

Stock Transfer

Last Update Time: 2023-07-12 11:59:51

Item Code	Item Name	Stock On Hand	101	office	
ABSSP23.9-1U	ABSS Premier v23.9 with 1 User License	70	6	64	<input type="button" value="Edit"/> <input type="button" value="Item Variations"/>
ABSSPP23-1U	ABSS Premier Plus v23.9 w...	79	10	69	<input type="button" value="Edit"/> <input type="button" value="Item Variations"/>

Press **Edit to** edit the inventory item profile.

In the Edit Product interface, users can edit the category, code, selling price, cost, etc.

Item Variations are for ABSS items with attributes only.

Category: Software

Item Code (SKU): 333 (Maximum character length: 30)

External Code: 333 (Maximum character length: 30)

Item Name: UT.exe (Maximum character length: 30)

Base Selling Price (\$)*: 1000

Cost for Purchase (\$)*: 600

Item Price Level

Price Level A Selling Price (\$): 1000

Price Level B Selling Price (\$): 1000

Price Level C Selling Price (\$): 1000

Price Level D Selling Price (\$): 1000

Price Level E Selling Price (\$): 1000

Price Level F Selling Price (\$): 1000

Description (Maximum character length: 255): The legendary UT.exe Dunno wt to type here lol

Weight (kg): 0

Width (m): 0

Height (m): 0

Current Char. Count: Replacing Item Name on Receipt

Length (m): 0

Batch Serial No. Expiry Date

Active

[Back To List](#)

When finished, click **"Save"**.

SmartBusiness – Item

Commodity changes

Stock

Item Code or Name

Last Update Time: 2023-07-12 11:59:51

Item Code	Item Name	Stock On Hand	101	office	
ABSSP23.9-1U	ABSS Premier v23.9 with 1 User License	70	6	64	<input type="button" value="Edit"/> <input type="button" value="Item Variations"/>
ABSSPP23-1U	ABSS Premier Plus v23.9 w...	79	10	69	<input type="button" value="Edit"/> <input type="button" value="Item Variations"/>

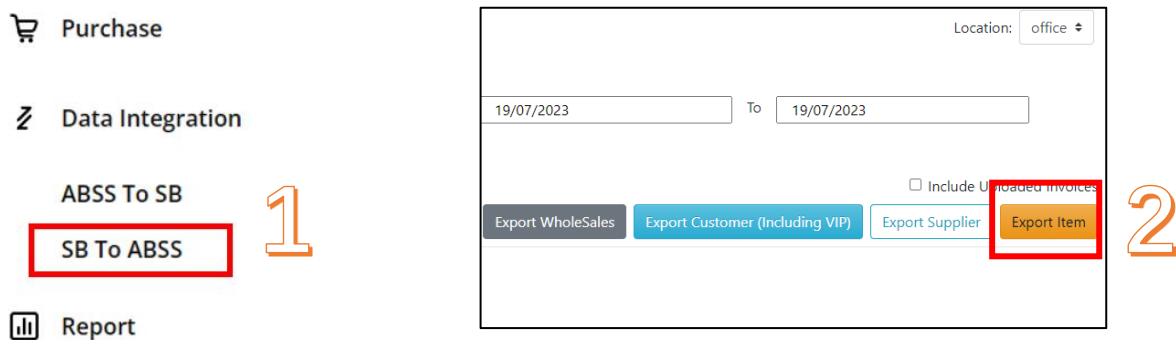
Observe product changes by clicking **commodity changes**.

Other versions of ABSS are available



*After adding items to SB, please import item data into ABSS for storage.

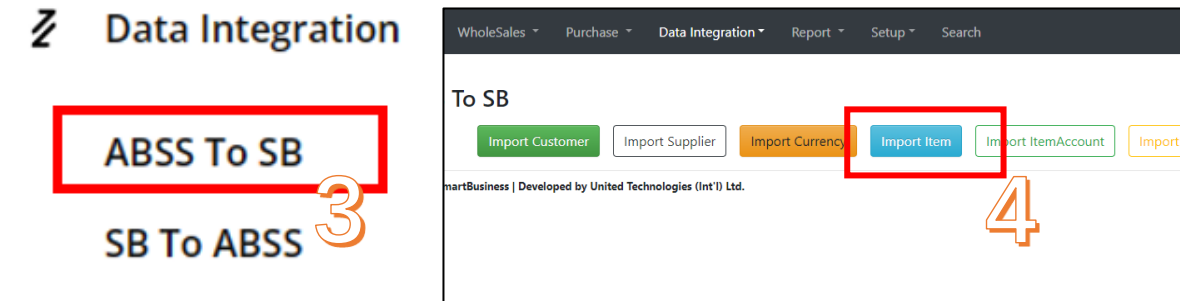
Click **“Data Integration” > “SB to ABSS”** from the navigation bar to import item data.



SmartBusiness – Item

*After successfully importing to ABSS, please update the ABSS data to SB again.

Click “Data Integration” > “ABSS to SB” from the navigation bar to import item data.



Report

Stock Transfer

- Customer
- Items
 - New Item
 - Stock
 - Stock Transfer**
 - Stock Transfer Order
 - Category
 - Out-Of-Stock Items
- Promotion

In the navigation bar, press **Items** > **Stock Transfer**.

庫存轉移

項目代碼或名稱 搜索

轉倉號碼: ST100002 最後更新日期: 2023-06-07 19:01:42

商品代碼	商品名稱	庫存	101	office	庫存平衡
ABSSP23.9-1U	ABSS Premier v23.9 with 1 User License	0	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
ABSSPP23-1U	ABSS Premier Plus v23.9 w...	0	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
ABSSPP23-3U	ABSS Premier Plus v23.9 w...	0	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

SmartBusiness – Item

When allocating information, pay attention to and adjust the amount of inventory elsewhere, otherwise there will be an **inventory imbalance**.

最後更新日期: 2023-06-15 14:39:36

庫存	101	office	庫存失衡
71	<input type="text" value="8"/>	<input type="text" value="65"/>	<input type="text" value="-2"/>
79	<input type="text" value="10"/>	<input type="text" value="69"/>	<input type="text" value="0"/>

(In the item "ABSS Premier v23.9 with 1 User License", if there is an inventory imbalance, the "Stock Imbalance" column will turn red and display a negative value.)



(↑In addition, if you press "Transfer Inventory" in this case, a message will pop up to prevent the transfer in case of imbalance.)

<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

轉移庫存

When finished, click "Transfer Inventory".



(↑ Message after successful transfer.)

Stock Transfer Order

Customer

Items

New Item

Stock

Stock Transfer

Stock Transfer Order

Category

Out-Of-Stock Items

Promotion

In the navigation bar, click "Item" > "Stock Transfer Order".

存貨調配清單

由 2023-05-01 至 2023-06-16

請輸入關鍵字。

搜索

重新載入

轉倉碼	出貨人	貨物編號	商品名稱	收貨倉	日期	編輯	列印
ST100004	office	ABSSP23.9-1U	ABSS Premier v23.9 with 1 User License	101	23-06-15	編輯	列印
ST100004	office	ABSSP23.9-1U	ABSS Premier v23.9 with 1 User License	101	23-06-15	編輯	列印
ST100002	office,101	ABSSP23.9-1U	ABSS Premier v23.9 with 1 User License	101	23-06-15	編輯	列印
ST100002	office,101	ABSSP23.9-1U	ABSS Premier v23.9 with 1 User License	office	23-06-15	編輯	列印
ST100001	office	COCA-COLA		101	23-06-15	編輯	列印
1					23-05-27	編輯	列印

SmartBusiness – Item

Edit

After pressing **Edit**, the system will be taken to the edit page.

編輯 轉倉單

轉倉號碼 **ST100004**

轉倉日期 **2023-06-15**

收貨倉 **101**

出貨倉 簽名	出貨倉	出貨量	貨物編號	商品名稱	入貨量	點收數量	差額	收貨倉 簽名	備註	
<input type="checkbox"/>	office	2	ABSSP23.9-1U	ABSS Premier v23.9 with 1 User License	2	0	0	<input type="checkbox"/>		儲存
<input type="checkbox"/>	office	1	ABSSP23.9-1U	ABSS Premier v23.9 with 1 User License	1	0	0	<input type="checkbox"/>		儲存

列印

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

In the editing page, users can modify the information of the goods in transit. When finished, click **"Save"**.

(↑ The "Print" button at the bottom left will be directed to the "Print Rollover Order" page)

Print Order

1. After pressing "Print", the system will enter the print page.

日期		
23-06-15	編輯	列印
23-06-15	編輯	列印
23-06-15	編輯	列印
23-06-15	編輯	列印
23-05-27	編輯	列印

SmartBusiness – Item

- The page will preview the printed format of the Stock Transfer Order:

聯訊科技（國際）有限公司

轉倉單

轉倉號碼 **ST-ST100004**

轉倉日期 **2023-06-15**

轉出 **office**

轉入 **101**

製作日期 **2023-06-15**

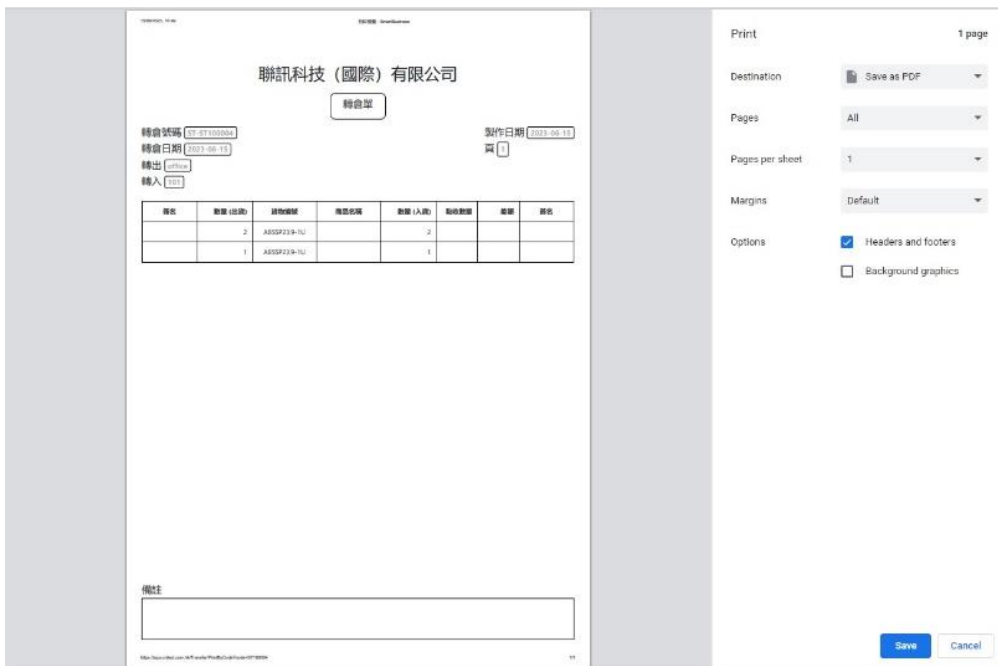
頁

發名	數量 (出貨)	貨物編號	商品名稱	數量 (入貨)	黏收數量	差額	發名
	2	ABSSP23.9-1U		2			
	1	ABSSP23.9-1U		1			

備註


- 與此同時，瀏覽器會彈出列印預覽視窗：


(Google Chrome)



Category

This page is used to manage the various categories of your products.

 Customer

 Items

New Item

Stock

Stock Transfer

Stock Transfer Order

Category

Out-Of-Stock Items

 Promotion

In the navigation bar, press "Items" > "Categories".

Category page:



名稱	創建時間	修改時間	
Uncategorized	2023-03-24 17:10:42	2023-03-30 12:22:02	編輯 刪除
Hardware	2023-03-24 17:23:14	2023-03-30 12:21:35	編輯 刪除
Software	2023-03-24 17:42:47	2023-03-30 12:21:13	編輯 刪除
Food	2023-03-24 17:42:58	2023-03-30 12:20:44	編輯 刪除
Garments	2023-03-24 17:43:38	2023-03-28 17:39:48	編輯 刪除

SmartBusiness – Item

Edit Category

Press **Edit** to make edit to the category.

修改時間	
2023-03-30 12:22:02	編輯 移除
2023-03-30 12:21:35	編輯 移除
2023-03-30 12:21:13	編輯 移除
2023-03-30 12:20:44	編輯 移除
2023-03-28 17:39:48	編輯 移除

This page allows you to modify the name of the category and its description, in English, Traditional Chinese, and Simplified Chinese.

編輯類別

名稱 (英文)	名稱 (繁中)	名稱 (簡中)
<input type="text" value="Uncategorized"/>	<input type="text" value="未分類"/>	<input type="text" value="未分類"/>
描述 (英文)	描述 (繁中)	描述 (簡中)
<input type="text" value="Default Category"/>	<input type="text" value="未分類描述"/>	<input type="text" value="未分類描述"/>

[儲存](#)

[回到列表](#)

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

Delete a category

Press **Delete** to delete the category.

Note that if the category is in use by a product, it cannot be deleted.

修改時間	
2023-03-30 12:22:02	編輯 移除
2023-03-30 12:21:35	編輯 移除
2023-03-30 12:21:13	編輯 移除
2023-03-30 12:20:44	編輯 移除
2023-03-28 17:39:48	編輯 移除

Out-of-Stock Items

Customer

Items

New Item

Stock

Stock Transfer

Stock Transfer Order

Category

Out-Of-Stock Items

Promotion

In the navigation bar, click "Item" > "Out of Stock Items".

If there is an out-of-stock situation, the out-of-stock list will be displayed:

缺貨商品	
發票號碼	商品明細 (商品代碼 描述 日期時間)
WS100054	PASA000001 2023-06-16 14:23:50
	MASSO(REL_WINE) 2023-06-16 14:23:50

1

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

If there is no out-of-stock, the following message appears:

缺貨商品	
沒有找到數據。	

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

SmartBusiness – Promotion

Promotion

eBlast

 Items

 Promotion


Eblast

Track Result

Item Period Promotion

Item Qty Promotion

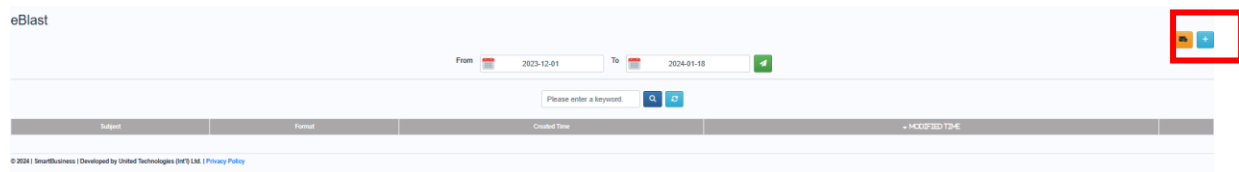
Promotion List

 Wholesales

In the navigation bar, click "**Promotion**" > "**eBlast**".

Filter can be applied to check all the email marketing campaigns.

Add eBlast



The screenshot shows the 'eBlast' interface. At the top right, there is a red box containing a plus sign icon, labeled 'Add eBlast'. Below this, there is a search bar with the text 'Please enter a keyword.' and a search icon. The main area contains a table with the following columns: Subject, Format, Created Time, and Modified Time. The table is currently empty. At the bottom left, there is a small copyright notice: '© 2024 | SmartBusiness | Developed by United Technologies (Int'l) Ltd. | Privacy Policy'.

SmartBusiness – Promotion

Click the blue add button on the right top corner to add new email marketing campaign.

Add eBlast

Fields marked with asterisk (*) are mandatory.

HTML Text

Subject*

Content*
(Note: The variable placeholders of ##NAME## and ##IMG## must be inside the content of a eBlast for a fully customized eDM to be trackable.)

My Favorites File Edit View Insert Format Tools Table Help

Paragraph B I

##NAME##

Content

##IMG##

If you no longer wish to receive our e-marketing message, please click the following link.

[Unsubscribe from eBlast](#)

21 words tiny

Scheduled Sending Time*

Pause (seconds) before sending again

[Back To List](#)

© 2024 | SmartBusiness | Developed by United Technologies (Int'l) Ltd. | [Privacy Policy](#)

Fields marked with asterisk (*) are mandatory. Emails content and the sending time can be customized before distributing.

SmartBusiness – Promotion

Track Result

Items

Promotion

Eblast

Track Result

Item Period Promotion

Item Qty Promotion

Promotion List

Wholesales

In the navigation bar, click "**Promotion**" > "**Track Result**".

Track Result

From To

No Data Found.

© 2024 | SmartBusiness | Developed by United Technologies (Int'l) Ltd. | [Privacy Policy](#)

To track the promotion of the organization, fill in the information of the organization from a specific period and click "**Submit**" to view and track the promotion results.

SmartBusiness – Promotion

Item Period Promotion

- Items
- Promotion
 - EBlast
 - Track Result
 - Item Period Promotion**
 - Item Qty Promotion
 - Promotion List
- Wholesales

In the navigation bar, click "**Promotion**" > "**Item Period Promotion**".

This page provides a list of periodic promotions for your products.

New Item Period Promotion

Tap **Add** to add a new product cycle promotion.

商品	推廣	開始日期	結束日期	創建時間	
ABSSV28.9	Period1	2023/06/03	2023/06/30	2023-06-03 10:04:40	編輯 移除

After entering the Add interface, select a product category first.

新增商品價格推廣

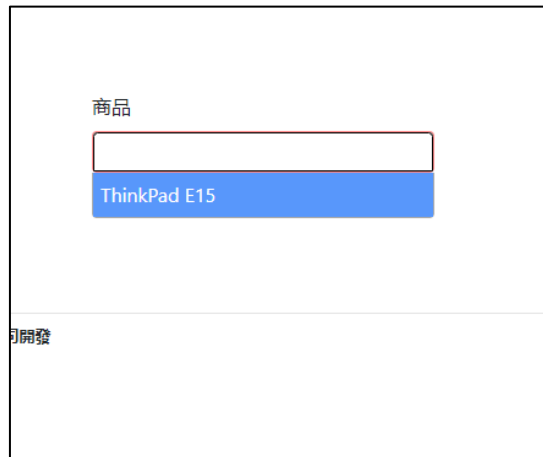
商品類別

- 未分類
- 硬件**
- 軟件
- 食物
- 衣服

限公司開發

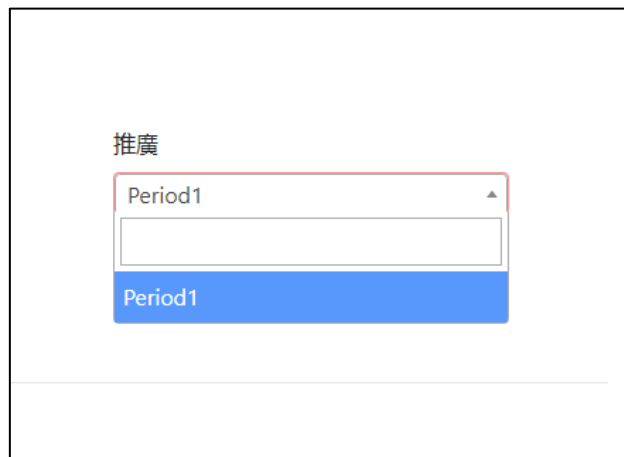
SmartBusiness – Promotion

In the "Products" field,
Select a product in that category.

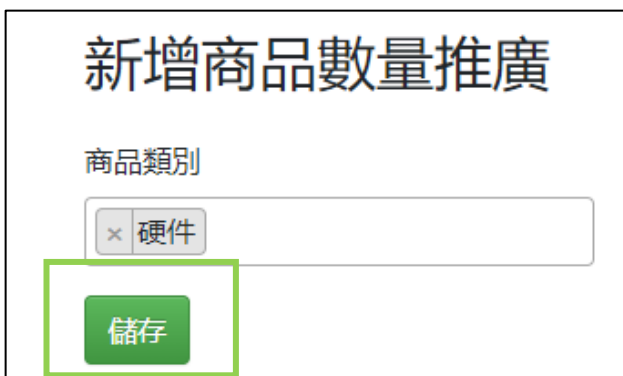


The screenshot shows a form titled "商品" (Products). Below the title is a search input field. A dropdown menu is open, showing a blue selection bar with the text "ThinkPad E15". Below the dropdown, the text "可開發" (Developable) is visible.

In the "Promotion" section,
Select the type of promotion.



The screenshot shows a form titled "推廣" (Promotion). Below the title is a dropdown menu with "Period1" selected. Below the dropdown is an empty input field. Below that is a blue selection bar with the text "Period1".



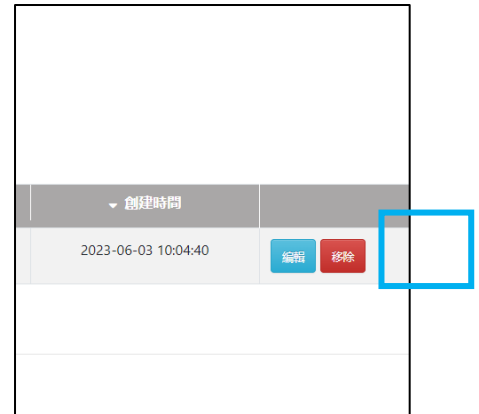
The screenshot shows the title "新增商品數量推廣" (New Product Quantity Promotion). Below it is the label "商品類別" (Product Category). A search input field contains the text "× 硬件". Below the input field is a green button with the text "儲存" (Save), which is highlighted with a green border.

After completing the settings, press "Save".

SmartBusiness – Promotion

Edit Item Period Promotion

On the "Item Period Promotion" page, click "Edit".



A screenshot of the '編輯商品價格推廣' (Edit Item Price Promotion) form. The form has three input fields: '商品類別' (Product Category) with a dropdown menu showing 'x 硬件' (Hardware), '商品' (Product) with a dropdown menu showing 'x GeForce RTX 1070 12GB', and '推廣' (Promotion) with a dropdown menu showing 'Period1'. Below the input fields is a green '儲存' (Save) button and a blue '回到列表' (Back to List) link. At the bottom, there is a copyright notice: '© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發'.

Once you're on the edit page, you can change your promotions.

When finished, click "Save".

Remove Item Period Promotion

On the Item Period Promotion page, click **Remove**.



Item Quantity Promotion

- Items
- Promotion
 - EBlast
 - Track Result
 - Item Period Promotion
 - Item Qty Promotion**
 - Promotion List
- Wholesales

In the navigation bar, click "**Promotion**" > "**Item Quantity Promotion**".

New Item Quantity Promotion

商品數量推廣

[新增](#) **Add Item Qty Promotion**

請輸入關鍵字。

商品	推廣	數量	價格 (\$)	折扣%	創建時間	
MASSO(RED_WINE)	QtyPro1	5	10.00	0.00	2023-06-03 10:37:04	編輯 移除

1

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

在此頁面可檢視公司的商品數量推廣。

按「新增」以新增商品數量推廣。程序大致與新增週期數量推廣相同：

新增商品數量推廣

商品類別

商品

推廣

Press Save when finished

[回到列表](#)

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

SmartBusiness – Promotion

Promotion List

- Items
- Promotion
 - EBlast
 - Track Result
 - Item Period Promotion
 - Item Qty Promotion
 - Promotion List**
- Wholesales

In the navigation bar, click "Promotions" > "Promotion List".

Go to this page to view all promotions, including cycle and quantity promotions.

推廣

[新增](#)

請輸入關鍵字。 [搜索](#) [重新載入](#)

[Edit Promotion](#) [Remove Promotion](#)

名稱	開始日期	結束日期	價格 (\$)	折扣 (%)	數量	創建時間	
QtyPro1	N/A	N/A	10.00	0.00	5	2023-06-03 10:36:38	編輯 移除
Period1	2023/06/03	2023/06/30	0.00	10.00	0	2023-06-03 10:02:45	編輯 移除

1

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

Added product cycle promotion

Similarly, to add a promotion, simply click the "Add" button at the top left.

SmartBusiness – Promotion

The new promotion page is slightly different from the normal page (all fields are not required).

新增推廣

名稱 (英文) English name	名稱 (繁中) Traditional Chinese name	名稱 (簡中) Simplified Chinese name
描述 (英文)	描述 (繁中)	描述 (簡中)
Enter description in each language		
<input checked="" type="radio"/> 週期	<input type="radio"/> 數量	
開始日期 2023-06-23	結束日期 2023-06-24	折扣 (%)
Enter promotion dates and discounts		
<input type="button" value="儲存"/>	Press Save when done	


[回到列表](#)

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

WholeSales

Add Order

 Promotion

 Wholesales

Add Order

Wholesale Order
Management (For
Delivery)

 Purchase

In the navigation bar, click "Wholesale" > "Add Order".

Note that only the Manager user can perform this action.

After adding a wholesale order, select the currency, [location and customer](#), and after selecting the product, click the green button to add wholesale.

新增 批發

使用經常性訂單記錄

批發代碼

WS100042

批發日期*

2023-06-08

客戶*

-- 選擇 --

送貨地址

	商品代碼	商品名稱	
1			

備註



SmartBusiness - WholeSales

ORDER

貨幣 HKD **地點** office

客戶條款 客戶採購訂單號 送貨日期 2023-06-09

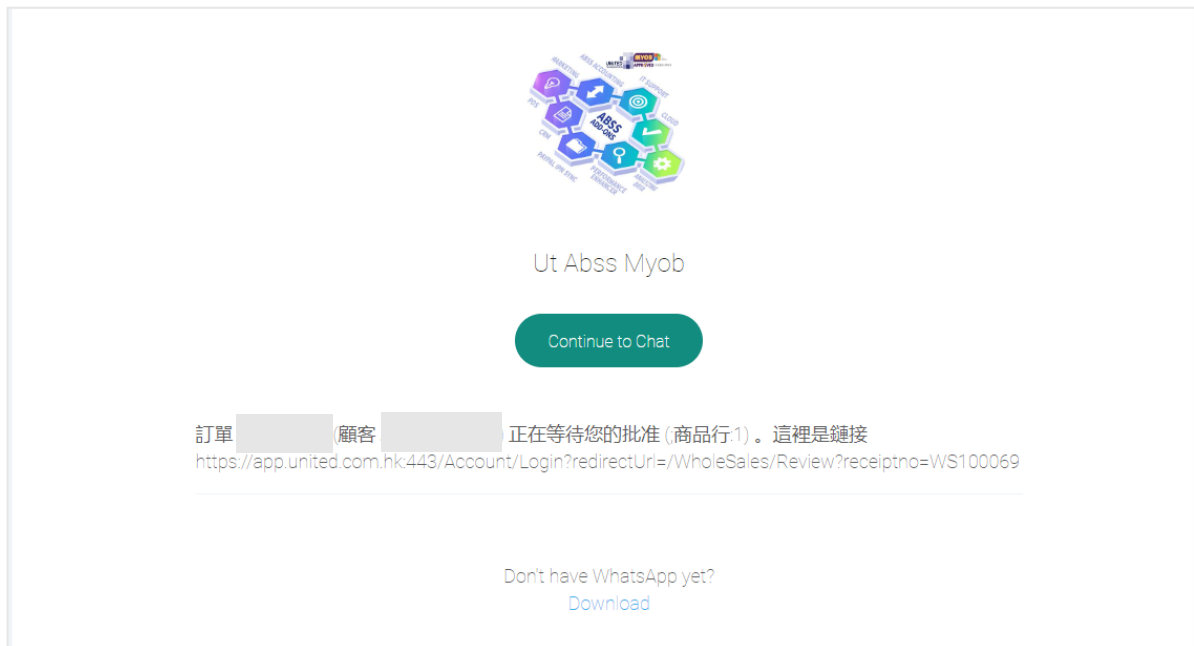
基本單位	數量	售價 (\$)	折扣%	稅%	金額 (\$)

總金額 (\$) 0.00

申請批核 以經常性訂單儲存 新增批發


Press "Request for Approval" when done.

Since this system uses **WhatsApp API** for approval, it is normal for a new WhatsApp window to pop up.



WholeSale Order Management (for Delivery)

 Promotion

 Wholesales

Add Order

Wholesale Order
Management (For
Delivery)

 Purchase

After storing orders, go to **Wholesale > Wholesale Order Management (For Delivery)**.

On the "Order Management" page, you can see "ORDER" with the status of the wholesale order in **light yellow**.

You can choose to edit or print the wholesale order.

代碼	客戶	地點	狀態	批發日期	送貨日期		列印
WS100006	Test Co. Ltd.	office	ORDER	2023-06-21	2023-06-22	編輯 刪除	批發訂單

Light yellow "ORDER" status

Click **Edit** to enter the Edit page Wholesale Single page. ↓

編輯 批發

[使用經常性訂單記錄](#) ORDER

批發代碼: WS100007 批發日期*: 2023-06-21 貨幣: HKD (匯率: 1.000000) 地點*: office (適用於所有銷售地點)

客戶*: ALL FOR GOD INT'L CO 送貨地址: 客戶條款: Cash On Delivery 客戶採購訂單號: 送貨日期: 2023-06-22

商品代碼	商品名稱	基本單位	數量	售價 (\$)	折扣%	稅%	地點	項目	金額 (\$)
1	ABSSPP23-1U	Box	1	5888.00	0.00	0.00	office	---	5888.00
2							office	---	

備註:

總金額 (\$): 5888.00

[發票](#) [儲存](#) [上傳檔案](#)

[回到列表](#)

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

SmartBusiness -WholeSales

Click **Invoices** when you're done. ↓

編輯 批發

使用經常性訂單記錄

批發代碼: WS100007 | 批發日期: 2023-06-21 | 貨幣: HKD | 地點: office

客戶: ALL FOR GOD INT'L CO | 送貨地址: | 客戶條款: Cash On Delivery | 客戶採購訂單號: | 送貨日期: 2023-06-22

商品代碼	商品名稱	基本單位	數量	出貨	批次	序號	到期日	售價 (\$)	折扣%	稅%	地點	項目	金額 (\$)
1	ABSSPP23-1U	ABSS Premier Plus v23.9 with 1 U...	Box	1	1			5888.00	0.00	0.00	office	---	5888.00

備註

總金額 (\$): 5888.00

發票 | 儲存 | 上傳檔案

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

After clicking on the invoice, the interface will turn to light blue and **Invoice** (as shown by the red arrow), double-click the **amber colored cell** to select the relevant Batch, Serial Number and Expiration Date in the purchase.

When you finish entering your data, click **Save**.

When you return to the list, the order status changes to "DELIVER" and turns **purple**. In this state, the "Print" and "Shipping Order" buttons will appear in the "Print" column.

代碼	客戶	地點	狀態	批發日期	承諾日期	列印
WS000020	Apress Ltd.	office	DELIVER	2023-01-11	2023-01-12	明細 移除 發票 出貨單

Purple "DELIVER" status

SmartBusiness - WholeSales

Remove the order

To remove an order, simply press the **delete button**.

送貨日期		列印
2023-06-20	明細 刪除	
2023-06-20	明細 刪除	
2023-06-20	明細 刪除	
2023-06-18	明細 刪除	

WholeSales Order List (for Approval)

This page allows you to view the list of sales orders and approve wholesale orders by the **Admin** user.

銷售訂單清單

請輸入關鍵字。 銷售員 銷售單資料 商品資料 客戶資料

由 至

[發送](#) [重新載入](#)

發票號碼	銷售人員	客戶	備註	狀態	開單時間	送貨日期	
WS100054	Kim	2H Company Limited	test	已批核	2023-06-16 14:23:50	2023-06-17	明細 複製
WS100052	Kim	2H Company Limited	test	已批核	2023-06-15 17:23:36	2023-06-16	明細 複製


1


© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

SmartBusiness - Purchase

Purchase

New Purchase Order


 Wholesales

 Purchase

New Purchase Order

Purchase Order
Management (For
Receival)

Supplier
Management

 Data Integration

In the navigation bar, click "**Purchase**" > "**New Purchase Order**".

新增 採購

ORDER

採購代碼: IP100020 採購日期*: 2023-06-26 貨幣: HKD 供應商*: -- 選擇 -- 供應商發票: 地點*: office

匯率: 1.000000 適用於所有銷售地點

商品代碼	商品名稱	基本單位	數量	單價 (\$)	折扣%	稅%	地點	項目	金額 (\$)
1							office	---	

承諾日期: 2023-06-27 備註:

總金額 (\$) 0.00

[回到列表](#)

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

1. Select a vendor.
2. Select a sourcing location.
3. Select the products to be purchased, and adjust the quantity, discount, item, etc. as needed.
4. When finished, press "Save".

SmartBusiness - Purchase

After entering the purchase information, the purchase order can be further processed in the purchase order management and purchase order list.

Cautions:

New purchase orders completed by Sales cannot directly create a valid purchase order.

Sales' new purchase order **must be approved and approved by the Manager/Administrator before it can be successfully opened.**

新增採購

ORDER

採購代碼: IP100052 採購日期*: 2023-06-27 貨幣: HKD 匯率: 1.000000 供應商*: -- 選擇 -- 供應商發票 地點*: office 適用於所有銷售地點

1	商品代碼	商品名稱	基本單位	數量	單價 (\$)	折扣%	稅%	地點	項目	金額 (\$)
								office	...	

承諾日期: 2023-06-28 備註:

總金額 (\$) 0.00

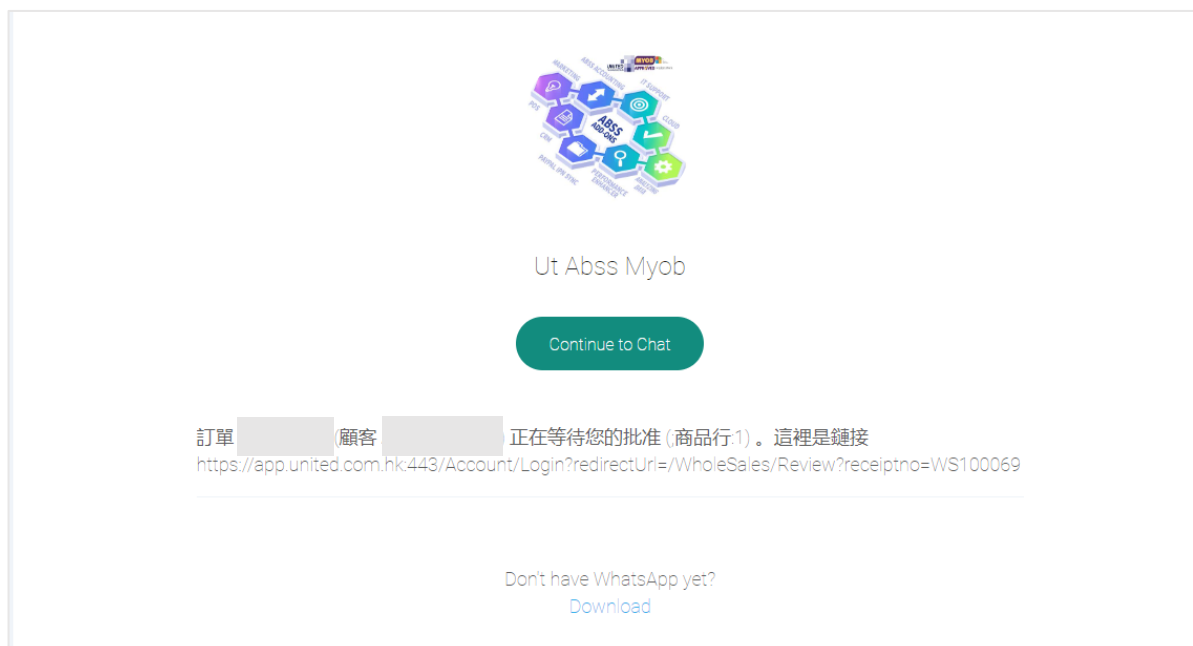
申請批核 新增採購

回到列表

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發


↑Sales' new page is slightly different from Manager/Administrator's.

this system uses **WhatsApp API** for approval, it is normal for a new WhatsApp window to pop up.



SmartBusiness - Purchase

Purchase Order Management

 Wholesales

 Purchase

New Purchase Order

Purchase Order Management (For Receipt)

Supplier Management

 Data Integration

In the navigation bar, click "**Purchase**" > "**Purchase Order Management (For Receipt)**".

This page can be used to view the purchase status of goods, print purchase orders, print shipping orders, and approve receipt of items.

Please note: Only **Manager** and **Administrator** accounts are authorized to receive goods.

Sales can only check the status of purchases and cannot approve the receipt of goods.

採購

由 2023-05-01 至 2023-06-27

請輸入關鍵字

代碼	供應商	狀態	採購日期	承諾日期	
IP100050	Cleaner Limited	OPENED	2023-06-26	2023-06-27	<input type="button" value="編輯"/> <input type="button" value="採購單"/> <input type="button" value="入庫單"/> <input type="button" value="移除"/>
IP100019	SunShine Company Limited	OPENED	2023-06-26	2023-06-27	<input type="button" value="編輯"/> <input type="button" value="採購單"/> <input type="button" value="入庫單"/> <input type="button" value="移除"/>
IP100018	ABS Supplier	OPENED	2023-06-26	2023-06-27	<input type="button" value="編輯"/> <input type="button" value="採購單"/> <input type="button" value="入庫單"/> <input type="button" value="移除"/>
IP100017	ABS Supplier	OPENED	2023-06-26	2023-06-27	<input type="button" value="編輯"/> <input type="button" value="採購單"/> <input type="button" value="入庫單"/> <input type="button" value="移除"/>
IP100049	Cleaner Limited	CREATED	2023-06-26	2023-06-27	<input type="button" value="編輯"/> <input type="button" value="採購單"/> <input type="button" value="入庫單"/> <input type="button" value="移除"/>
IP100048	ABS Supplier	CREATED	2023-06-20	2023-06-21	<input type="button" value="編輯"/> <input type="button" value="採購單"/> <input type="button" value="入庫單"/> <input type="button" value="移除"/>
IP100046	ABS Supplier	OPENED	2023-06-19	2023-06-20	<input type="button" value="編輯"/> <input type="button" value="採購單"/> <input type="button" value="入庫單"/> <input type="button" value="移除"/>
IP100044	SunShine Company Limited	OPENED	2023-06-16	2023-06-17	<input type="button" value="編輯"/> <input type="button" value="採購單"/> <input type="button" value="入庫單"/> <input type="button" value="移除"/>

1

SmartBusiness - Purchase

Receive the goods

採購日期	承諾日期	
2023-06-26	2023-06-27	編輯 採購單 入庫單 移除
2023-06-26	2023-06-27	編輯 採購單 入庫單 移除
2023-06-26	2023-06-27	編輯 採購單 入庫單 移除

To receive items, please click "Edit" in the item item as "Manager" or "Administrator".

IP100045	ABS Supplier	CREATED	2023-06-17	2023-06-18	編輯 採購單 入庫單 移除
----------	--------------	---------	------------	------------	---

On the "Purchase Order Management" page, items that have not received items have a status with a white background: CREATED.

After pressing Edit, the system will be taken to the Edit Purchase page.

Note the word CREATED in the upper right, which is the same as the item that was not received on the Purchase Order Management page, which is the "Status" of the purchase order. In this state, the page background is **light yellow**, which means **that the purchase order has been created**.

編輯 採購

CREATED

採購代碼: IP100048 採購日期*: 2023-06-20 貨幣: HKD 供應商*: ABS Supplier 供應商發票: 地點*: office

商品代碼	商品名稱	基本單位	數量	單價 (\$)	折扣%	稅%	地點	項目	金額 (\$)
1 B0002	黑色時尚教手提包	PCS	1	800.00	0.00	3.00	office	---	824.00

承諾日期: 2023-06-21 備註: 總金額 (\$): 824.00

[接收貨品](#) [儲存](#) [上傳檔案](#)

回到列表

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

Click "Receive Item" to receive the Item.

SmartBusiness - Purchase

After pressing "Receive Item", the "Edit Purchase" page will change:

編輯 採購

採購代碼: IP100045 | 採購日期: 2023-06-17 | 貨幣: HKD | 供應商: ABS Supplier | 供應商發票: | 地點: office

匯率: 1.000000

商品代碼	商品名稱	基本單位	數量	批次	序號	到期日	單價 (\$)	折扣%	稅%	地點	項目	金額 (\$)	已收數量	
承諾日期	2023-06-18	備註											總金額 (\$)	3605.00
											test			

接收貨品 儲存 上傳發票 檢視檔案

回到列表

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

Notice that the status word in the top right has changed to BILL. In this state, the page background is light blue, which means that the purchase order has been accepted and received.

After returning to the purchase order management page, the original light yellow status CREATED has changed to OPENED, that is, the goods have been received.

IP100045	ABS Supplier	OPENED	2023-06-17	2023-06-18	編輯	採購單	入庫單	移除
----------	--------------	--------	------------	------------	----	-----	-----	----

Print the purchase order/put-away order

The purchase order management page has the function of printing purchase order/inbound order. Click the dark Purchase Order or Shipping Order.

IP100045	ABS Supplier	OPENED	2023-06-17	2023-06-18	編輯	採購單	入庫單	移除
----------	--------------	--------	------------	------------	----	-----	-----	----

SmartBusiness - Purchase

Customer

Items

New Item

Stock

Stock Transfer

Stock Transfer Order

Category

Out-Of-Stock Items

Promotion

After returning to "Products" > "Inventory", the quantity of the goods will change after they are purchased.

"Inventory", before purchasing:

B0002	黑色時尚款手提包	0	0	0	編輯	商品變化
-------	----------	---	---	---	----	------

"Inventory", after purchasing:

B0002	黑色時尚款手提包	10	0	10	編輯	商品變化
-------	----------	----	---	----	----	------

Purchase order

United Technologies (Int'l) Ltd.				
採購單				
送予				
採購號碼-IP100049				
訂單日期2023-06-27				
	商品代碼	商品名稱	基本單位	數量
備註				

SmartBusiness - Purchase

Print Preview:

Print
Total: 1 sheet of paper

Printer
Microsoft Print to PDF (redirec...)

Copies
1

Pages
 All
 e.g. 1-5, 8, 11-13

Color
Color

More settings
Print using system dialog... (Ctrl+Shift+P)

Print Cancel

United Technologies (Int'l) Ltd.

採購單

送予
採購號碼 -IP100049
訂單日期 2023-06-27

商品代碼	商品名稱	基本單位	數量
------	------	------	----

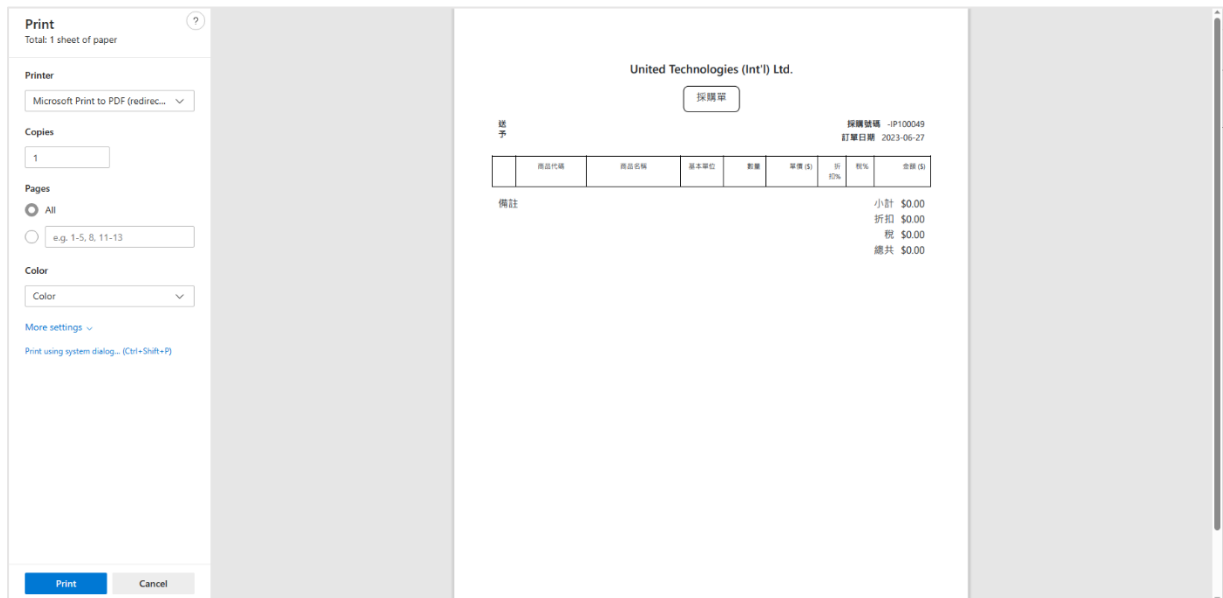
備註

Receipt

United Technologies (Int'l) Ltd.									
採購單									
送予									
採購號碼-IP100049									
訂單日期2023-06-27									
商品代碼	商品名稱	基本單位	數量	單價 (\$)	折扣%	稅%	金額 (\$)		
備註									
小計\$0.00									
折扣\$0.00									
稅\$0.00									
總共\$0.00									

SmartBusiness - Purchase

Print Preview:



Remove the purchase order

To delete a purchase order, press the **"Remove"** button on the far right.

IP100045	ABS Supplier	OPENED	2023-06-17	2023-06-18	編輯	採購單	入庫單	移除
----------	--------------	--------	------------	------------	----	-----	-----	----

Purchase Order List

The purchase order list can be used to approve purchase orders and approve and reject purchase orders.

Please note: Only the "Manager" status has the authority to manage the purchase of goods (e.g. approval, rejection, etc.).

Sales can only view purchase order details.

零售 客戶 商品 推廣 批發 採購 資料整合 報表 設定 搜索Manager 登出

採購單清單

請輸入關鍵字: 採購員 採購單資料 商品資料 供應商資料

由 至

發票號碼	採購員	供應商	備註	狀態	開單時間	承諾日期	
IP100051	Kim	SupTest 01	for manual	申請中	2023-06-27	2023-06-28	<input type="button" value="明細"/> <input type="button" value="批准"/> <input type="button" value="拒絕"/> <input type="button" value="Void"/>
IP100050	Kim	香港綠色科技有限公司	new	拒絕	2023-06-27	2023-06-28	<input type="button" value="明細"/> <input type="button" value="批准"/> <input type="button" value="拒絕"/> <input type="button" value="Void"/>
IP100049	Kim	ABS Supplier		廢單	2023-06-27	2023-06-28	<input type="button" value="明細"/> <input type="button" value="批准"/> <input type="button" value="拒絕"/> <input type="button" value="Void"/>
IP100048	Kim	ABS Supplier		已批核	2023-06-20	2023-06-21	<input type="button" value="明細"/> <input type="button" value="批准"/> <input type="button" value="拒絕"/> <input type="button" value="Void"/>
IP100047	Kim	ABS Supplier	test	已批核	2023-06-19	2023-06-20	<input type="button" value="明細"/> <input type="button" value="批准"/> <input type="button" value="拒絕"/> <input type="button" value="Void"/>
IP100046	Kim	ABS Supplier	test	已批核	2023-06-19	2023-06-20	<input type="button" value="明細"/> <input type="button" value="批准"/> <input type="button" value="拒絕"/> <input type="button" value="Void"/>
IP100045	Kim	ABS Supplier	test	拒絕	2023-06-17	2023-06-18	<input type="button" value="明細"/> <input type="button" value="批准"/> <input type="button" value="拒絕"/> <input type="button" value="Void"/>
IP100044	Kim	SunShine Company Limited	test	拒絕	2023-06-16	2023-06-17	<input type="button" value="明細"/> <input type="button" value="批准"/> <input type="button" value="拒絕"/> <input type="button" value="Void"/>

SmartBusiness - Purchase

Approve/Reject Purchase Orders Method #1

Select the invoices to approve/reject in the purchase order item.

發票號碼	採購員	供應商	備註	狀態	開單時間	承諾日期	
IP100051	Kim	SupTest 01	for manual	申請中	2023-06-27	2023-06-28	<input type="button" value="明細"/> <input type="button" value="批准"/> <input type="button" value="拒絕"/> <input type="button" value="Void"/>

If approved, the invoice status will change to **"Approved"** and turn green.

If you press Reject, a pop-up window will be displayed for filling in the reason for rejection, you can fill in the blanks.

IP100051	Kim	SupTest 01	for manual	已批核	2023-06-27	2023-06-28	<input type="button" value="明細"/> <input type="button" value="批准"/> <input type="button" value="拒絕"/> <input type="button" value="Void"/>
----------	-----	------------	------------	-----	------------	------------	---

拒絕的原因

Once completed, the invoice status will change to **"Rejected"** and turn **Red**.

IP100052	Kim	IM	for reject 27/06/23	拒絕	2023-06-27	2023-06-28	<input type="button" value="明細"/> <input type="button" value="批准"/> <input type="button" value="拒絕"/> <input type="button" value="Void"/>
----------	-----	----	------------------------	----	------------	------------	---

SmartBusiness - Purchase

Approve/reject purchase orders Method #2

Select the **details** in the purchase order item to enter the editing screen.

編輯 採購

CREATED

採購代碼: IP100050 採購日期: 2023-06-26 貨幣: HKD 供應商: Cleaner Limited 供應商發票: 地點: office

商品代碼	商品名稱	基本單位	數量	單價 (\$)	折扣%	稅%	地點	項目	金額 (\$)	
1	Z0005	Test Item	PCS	1	200.00	0.00	0.00	office	Project A	200.00

承諾日期: 2023-06-27 備註: test 4 utservice
26-06-2023 總金額 (\$): 200.00

批准 拒絕 接收貨品 儲存 上傳檔案

回到列表

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

Purchase orders can be approved/rejected

Unlike "Purchase Order Management", the edit page of the "Purchase Order List" ("Manager" or "Administrator") also has "Approve" and "Reject" buttons.

SmartBusiness - Purchase

Void

At the far right of the page, there is a red-edged button called VOID, which is used to discard the created invoice.



After pressing VOID, the system will pop up the interest increase to confirm whether to scrap the invoice.





After pressing "Confirm", the invoice status will change to "Void" and turn **black**.

ABS Supplier	廢單	2023-06-27	2023-06-28	明細	批准	拒絕	Void
--------------	----	------------	------------	----	----	----	------

SmartBusiness - Purchase

Supplier Management


 Wholesales

 Purchase

New Purchase Order

Purchase Order
Management (For
Receival)

Supplier
Management

 Data Integration

In the navigation bar, click **Procurement > Supplier Management**.

供應商

[新增](#)

請輸入關鍵字。 [搜索](#) [重新載入](#)

名稱	電郵	電話	聯絡人	創建時間	ABSS	
ABS Supplier	abs@supplier.com	96581234		2023-06-16 17:41:49	UTSB	編輯 移除
IM	pc@im.co	25649248		2023-06-16 17:41:49	UTSB	編輯 移除
SunShine Company Limited		85298761234		2023-06-16 17:41:49	UTSB	編輯 移除
香港綠色科技有限公司	info@greentechhk.com	+852 2345 6789		2023-06-16 17:41:49	UTSB	編輯 移除
Cleaner Limited	ritatsui@cleaner.com	21695342		2023-06-16 17:41:49	UTSB	編輯 移除
SupTest 01	sup01@test.com	12342423		2023-06-16 17:41:49	UTSB	編輯 移除
SupTest 01	sup01@test.com	12342423	Terry Bogard1	2023-05-27 16:10:18	N/A	編輯 移除

1

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

↑All suppliers in purchasing activities will be displayed on this page.

New Supplier

Press the blue button next to the supplier "Add".

Name is required (*).

供應商

[新增](#)

請輸入關鍵字。 [搜索](#) [重新載入](#)

SmartBusiness - Purchase

Edit Supplier

Press the blue key "Edit" next to the supplier.

ABSS	
UTSB	編輯 移除
UTSB	編輯 移除
UTSB	編輯 移除
UTSB	編輯 移除
UTSB	編輯 移除
UTSB	編輯 移除
N/A	編輯 移除

新增供應商

名稱* 電郵 電話 聯絡人

如果供應商已經上傳到 ABSS，則名稱不可修改。

城市 國家 網址

地址1

地址2

地址3

地址4

手機 1 WhatsApp 手機 2 WhatsApp 手機 3 WhatsApp

[儲存](#)















[回到列表](#)

The page is the same as for the new vendor. After changing the information, click "Save".

SmartBusiness - Purchase

Remove a Supplier

To delete a supplier, press **the "Remove"** button on the far right.

ABSS		
UTSB		
UTSB		
UTSB		
UTSB		
UTSB		
UTSB		
N/A		

SmartBusiness - Purchase

After changing suppliers in SB, import customer data into ABSS for storage.

Purchase

Data Integration

ABSS To SB

SB To ABSS 1

Report

至 08/06/2023

匯出採購 匯出批發 匯出客戶 (包括貴賓) **匯出供應商** 匯出

2

After the ABSS is successfully imported, update the ABSS data to the SB again.

Purchase

Data Integration

ABSS To SB 3

SB To ABSS

Report

匯入客戶 **匯入供應商** 匯入貨幣 匯入商品 匯入商品帳戶

4

Data Integration

Considerations when SmartBusiness interfaces with ABSS

To ensure smooth connection between SB and ABSS, please pay attention to the following:


1. When importing data, please turn off ABSS first, otherwise you will not be able to join data.
2. ABSS must have a customer card GUEST (card id: GUEST)
3. Job Number must be lowercase English or numbers (e.g. office, 101, shop01) and does not support uppercase English.
4. Employee must be in all uppercase English (e.g. ADMIN, PETER, MARY) and does not support uppercase or lowercase letters.
5. The card number of the foreign currency customer/supplier must follow the following format:

CAS+"Currency" + "Any Number"

Example: United States dollar (USD) + number 1234 = CASUSD1234

SmartBusiness – Data Integttation

ABSS to SB

 Purchase

 Data Integration

ABSS To SB

SB To ABSS

 Report

In the navigation bar, click **Data Integration** > **ABSS to SB**.

ABSS 至 SB

[匯入客戶](#) [匯入供應商](#) [匯入貨幣](#) [匯入商品](#) [匯入商品帳戶](#) [匯入稅](#)


© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

Note: When you start using SB every day, be sure to import "ABSS to SB" once to ensure that the data of ABSS and SB are consistent.

SmartBusiness – Data Integttation

SB to ABSS

 Purchase

 Data Integration

ABSS To SB

SB To ABSS

 Report

In the navigation bar, click **Data Integration** > **SB to ABSS**.

SB 至 ABSS

地點: office ▾

請選擇匯出數據的日期範圍: 至

包括已上傳發票

[匯出零售單](#) [匯出採購](#) [匯出批發](#) [匯出客戶 \(包括貴賓\)](#) [匯出供應商](#) [匯出商品](#)

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

Report

Transaction details


 Data Integration

 Report

Transaction Details

Payment Methods
Details

Item Sales Details

 ABBS Report

In the navigation bar, click **Report > Transaction Details**.

交易明細

至

開始日期: 2023-06-08
結束日期: 2023-06-08

日期/時間	銷售號碼	湊整	付款方式	金額 (\$)		
2023/6/8 下午 02:28:14	KL100054	0.00	Cash	8688.00		
<small>商品代碼 ABSSPV23.9-3U</small>	<small>描述 MYOB Premier v22.3 with 3 Users License</small>	<small>售價 8,688.00</small>	<small>數量 1</small>	<small>折扣% 0.00</small>	<small>折扣額 0.00</small>	<small>金額 8688.00</small>
總額				8688.00		

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

List transaction details for a specific date

至

1234

1. Enter a date range.
2. Select a location (office, 101, or other).

SmartBusiness – Report

3. Select the appliance.
4. Press **Send**.

Example: From 25/06/2023 to 30/06/2023, on Office P10 devices.

交易明細

25/06/2023 至 30/06/2023 office P10 **發送**

開始日期: 2023-06-25
結束日期: 2023-06-30

Outcome:

交易明細

25/06/2023 至 30/06/2023 office P10 **發送**

開始日期: 2023-06-25
結束日期: 2023-06-30

日期/時間	銷售號碼	湊整	付款方式	金額 (\$)
2023/6/30 下午 12:29:04	DE100001	0.00	現金	8000.00
<small>商品代碼</small> AB5SPV23.9-3U	<small>描述</small> MYOB Premier v22.3 with 3 Users License		<small>售價</small> 8,688.00 <small>數量</small> 1 <small>折扣%</small> 0.00 <small>折扣額</small> 0.00	<small>金額</small> 8688.00
2023/6/30 下午 12:29:36	KL100001	0.00	現金	688.00
<small>商品代碼</small> AB5SPV23.9-3U	<small>描述</small> MYOB Premier v22.3 with 3 Users License		<small>售價</small> 8,688.00 <small>數量</small> 1 <small>折扣%</small> 0.00 <small>折扣額</small> 0.00	<small>金額</small> 8688.00
總額				17376.00

列印預覽

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

Payment method details


 Data Integration

 Report

Transaction Details

**Payment Methods
Details**

Item Sales Details

 ABBS Report

In the navigation bar, click **Reports > Payment Method Details**.

付款方式明細

08/06/2023 至 08/06/2023 office P10 


開始日期: 2023-06-08
結束日期: 2023-06-08

付款方式	交易時間	交易號碼	交易金額 (\$)	付款金額 (\$)
Cash	2023/6/8 下午 02:28:14	KL100054	8688.00	8688.00
			Cash 總額	8688.00



© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

List the details of payment methods for a specific date

08/06/2023 至 08/06/2023 office P10 

1 2 3 4

SmartBusiness – 報表

The process is roughly the same as the transaction details.

1. Enter a date range.
2. Select a location (office, 101, or other).
3. Select the appliance.
4. Press **Send**.

Example: From 25/06/2023 to 30/06/2023, on Office P10 devices.

付款方式明細

25/06/2023 至 30/06/2023 office P10 **發送**

開始日期: 2023-06-25
結束日期: 2023-06-30

Outcome:

付款方式明細

25/06/2023 至 30/06/2023 office P10 **發送**


開始日期: 2023-06-25
結束日期: 2023-06-30

付款方式	交易時間	交易號碼	交易金額 (\$)	付款金額 (\$)
現金	2023/6/30 下午 12:29:04	DE100001	8688.00	8000.00
	2023/6/30 下午 12:29:36	KL100001 (REF:DE100001)	8688.00	688.00
			現金 總額	8688.00

列印預覽

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

Item Sales Details


 Data Integration

 Report

Transaction Details

Payment Methods
Details

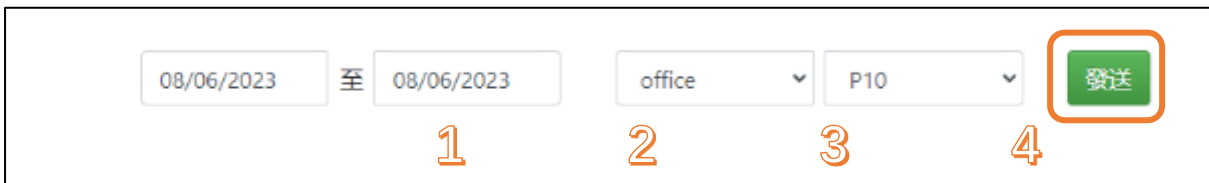
Item Sales Details

 ABBS Report

In the navigation bar, click **Reports > Item Sales Details**.



List the details of payment methods for a specific date



The process is roughly the same as the transaction details and payment method details.

1. Enter a date range.
2. Select a location (office, 101, or other).

SmartBusiness – 報表

3. Select the appliance.
4. Press **Send**.

Example: From 25/06/2023 to 30/06/2023, on Office P10 devices.

商品銷售

25/06/2023 至 30/06/2023 office P10 默認 以銷售人員分組 以客戶採購訂單號分組

發送

開始日期: 2023-06-25
結束日期: 2023-06-30

Outcome:

商品銷售

25/06/2023 至 30/06/2023 office P10 默認 以銷售人員分組 以客戶採購訂單號分組

發送

開始日期: 2023-06-25
結束日期: 2023-06-30

商品代碼	描述	基本售價 (\$)	已售數量	金額
ABSSPV23.9-3U	MYOB Premier v22.3 with 3 Users License	8688	1	8688.00
總共			1	8688.00

列印預覽 **返回**

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

ABSS Report

Quotation

- Report
- ABSS Report
 - Quotation**
 - Account Receivable
 - Salesperson Performance
 - Customer Invoice
- Record

In the navigation bar, click “**ABSS Report**” > “**Quotation**”.

User can view the revised quotation in table retrieved from ABSS.

Quotation

Order No.	Date	Customer	Item No.	Item Name	Sales Person	Qty	Selling Price (\$)
No Data Found							

Account Receivable

- Report
- ABSS Report
 - Quotation
 - Account Receivable**
 - Salesperson Performance
 - Customer Invoice
- Record

In the navigation bar, click “**ABSS Report**” > “**Account Receivable**”.

User can view the revised account receivable in table retrieved from ABSS.

Account Receivable


*All invoices shown here are of Open status.

Invoice Date	Due Date	Customer	Amount (\$)	Discount (%)	Total Due (\$)	Amount Applied (\$)
2023-12-19	2023-12-19	Kim LEUNG	35.00	0.00	35.00	35.00

SmartBusiness – Setup

Salesperson Performance

 Report

 ABSS Report

Quotation

Account Receivable

Salesperson Performance

Customer Invoice


 Record


In the navigation bar, click **“ABSS Report”** > **“Salesperson Performance”**.

User can view the revised salesperson performance in table.

Sales Person Performance							
Invoice Date	Invoice No.	Customer	Sales Person	Total Sales (\$)	Total Paid (\$)	Outstanding Balance (\$)	Invoice Status
No Data Found.							

Customer Invoice

 Report


 ABSS Report

Quotation

Account Receivable

Salesperson Performance

Customer Invoice

 Record


In the navigation bar, click **“ABSS Report”** > **“Customer Invoice”**.


User can view the revised customer invoice in table retrieved from ABSS.

Customer Invoices								
Invoice No.	Invoice Date	Customer	Total Paid (\$)	Outstanding Balance (\$)	Tax Inclusive Freight (\$)	Total Tax (\$)	Total Sales (\$)	
00100079	2023-12-19	Kim LEUNG	0.00	35.00	0.00	0.00	35.00	
00100055	2023-08-19	某某有限公司	0.00	-600.00	0.00	0.00	-600.00	

Record

Attendance Records

 ABSS Report


 Record

Attendance Records

Job Records

Training Records

Journal Records



 Setup

In the navigation bar, click **“Record”** > **“Attendance Records”**.


Filter can be applied to view the attendance records from a specific period.

User can view the revised attendance records in table retrieved from the Power App developed by United Technologies.

Attendance Records

From  2023-12-17 To  2024-01-16


2023-12-17 To 2024-01-16
Total Records: 7

 Sign In

ATTENDANCE DATE	Check-in Time	Staff Name
2023-12-19	14:54	Alain
2023-12-19	14:21	Alain
2023-12-19	11:48	Testing
2023-12-19	11:41	Testing
2023-12-19	11:33	Testing
2023-12-19	11:30	Kobee
2023-12-19	11:29	Kobee

SmartBusiness – Setup

Job Records

 ABSS Report

 Record

Attendance Records

Job Records

Training Records

Journal Records

 Setup

In the navigation bar, click **“Record”** > **“Job Records”**.

User can view the revised job records in table retrieved from the Power App developed by United Technologies.

Job Records

From To


2023-12-17 To 2024-01-16
Total Records: 8


[Sign In](#)

JOB DATE	Time Range	Working Hrs.	Staff Name	Client
2023-12-21	10:00 - 11:30	1.5	Lung	Azbil Hong Kong Limited
2023-12-20	12:45 - 14:00	1.25	Lung	Ma Pak Leung Co. Ltd
2023-12-20	10:00 - 12:00	2	Lung	Armor Capital
2023-12-19	14:00 - 14:30	0.5	Lung	Vis-A
2023-12-19	12:00 - 12:30	0.5	Lung	Sze Wo Chaan Company Limited
2023-12-19	10:00 - 10:30	0.5	Lung	Cooperator Electronic (H.K.) Ltd.
2023-12-18	14:30 - 18:30	4	Lung	New Cosmos Management Services (HK) Ltd
2023-12-18	10:00 - 11:00	1	Kim LEUNG	Vannex International Limited

SmartBusiness – Setup

Training Records

 ABSS Report


 Record

Attendance Records

Job Records

Training Records



Journal Records

 Setup


In the navigation bar, click **“Record”** > **“Attendance Records”**.

User can view the revised training records in table retrieved from the Power App developed by United Technologies.

Training Records

From  2023-12-17 To  2024-01-16


2023-12-17 To 2024-01-16
Total Records:


 Sign In

Training Date	Company	Applicant	Email	Industry	Attendance	Approval
---------------	---------	-----------	-------	----------	------------	----------

SmartBusiness – Setup

Journal Records

 ABSS Report


 Record

Attendance Records

Job Records

Training Records

Journal Records

 Setup

In the navigation bar, click “Record” > “Journal Records”.

User can view the revised journal records in table.

Journal

[Add](#)

Please enter a keyword. [Search](#) [Reload](#)

ID	Account No.	Account Name	Debit (\$)	Credit (\$)	Job	DATE	
GJ000001	6-1100	Legal Fees	0.00	2000.00	N/A	2024-01-16	Edit Remove
GJ000002	8-1000	Interest Income	2000.00	0.00	N/A	2024-01-16	Edit Remove

1



When the “Add” button is clicked, you will be able to add new journal into the table.

Add Journal

Journal ID: Date: Memo:

Account Classification	Account Name	Debit (\$)	Credit (\$)	Job	Alloc. Memo
- Select -	<input type="text"/>	<input type="text"/>	<input type="text"/>	---	<input type="text"/>
- Select -	<input type="text"/>	<input type="text"/>	<input type="text"/>	---	<input type="text"/>

Total Debit (\$)
Total Credit (\$)
Out of Balance (\$)

[Back To List](#) [Save](#)

Setup

Email settings

Record

Setup

Email Settings

Other Settings

Payment Types

Receipt

User Management

Exchange Rate Setup

"Email Settings" is used to set the company's email, domain, etc. location.

Click **Settings > Email Settings**.

Please note!

Please use Microsoft email to set up!

(For details, see "Pre-setup Reminder" on page 6 of this manual.)

電郵設定
星號(*)欄位為必填。

Office 365*

顯示名稱*

United Technologies (Int'l) Ltd.

電郵

SMTP 服務器*

192.168.123.12

SMTP 端口*

啟用SSL *

在 SMTP 服務器上進行身份驗證

SMTP 用戶名

S

.....

儲存

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

SmartBusiness – Setup

Other Setting

Record

Setup

Email Settings

Other Settings

Payment Types

Receipt

User Management

Exchange Rate Setup

"Other" allows you to set various properties in the SB.

Click **Setup** > **Other Settings**.

其他設定

備註: 所有設定將在下次登錄時生效。

收據徽標	<input checked="" type="checkbox"/> 
可編輯	<input checked="" type="checkbox"/> 價格可調控 <input checked="" type="checkbox"/> 折扣%
帳戶號碼	<input type="text" value="12110"/>
日期格	<input checked="" type="radio"/> 英 <input type="radio"/> 美
計算付款	<input checked="" type="checkbox"/> 顯示報表按鈕
默認客戶	銷售 <input type="text" value="GUEST"/> 退款 <input type="text" value="WALK-IN"/>
默認銷售備注	<input type="checkbox"/> 

SmartBusiness – Setup

可編輯

價格可調控 折扣%

帳戶號碼

12110

日期格

英 美

計算付款

顯示報表按鈕

默認客戶

銷售 GUEST 退款 WALK-IN

默認銷售備注

票據初始設置

序號 稅 錢箱金額 退款減庫存 用戶與設備掛鈎 允許在零售收據中顯示徽標
 在登出時檢查是否完成了結算 啟用購買/出售基本單位 外幣

儲存

After completing the input settings, press "Save".

SmartBusiness – Setup

Payment Types

Record

Setup

Email Settings

Other Settings

Payment Types

Receipt

User Management

Exchange Rate Setup

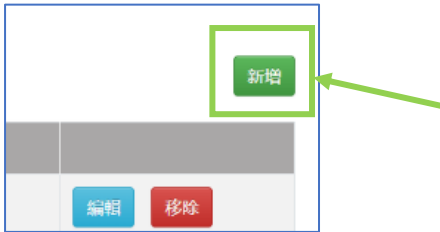
"Payment Method" allows you to manage the payment methods of retail.

Click **Settings > Payment Methods**.

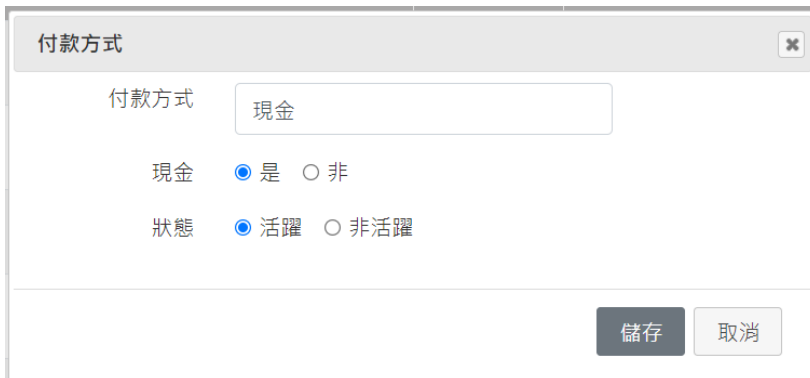
付款方式				新增	
付款方式	現金	狀態			
現金	是	活躍	編輯	移除	
Visa卡	非	活躍	編輯	移除	
萬事達卡	非	活躍	編輯	移除	
禮券	非	活躍	編輯	移除	
支付寶	非	活躍	編輯	移除	
微信	非	活躍	編輯	移除	
銀聯	非	非活躍	編輯	移除	

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

Add a new payment method



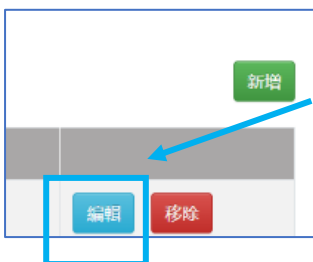
To add another payment method, please click "Add" at the top right of the page.

A dialog box titled '付款方式' (Payment Method) with a close button (X) in the top right corner. The form contains the following fields and options:

- '付款方式' (Payment Method): A text input field containing '現金' (Cash).
- '現金' (Cash): Radio buttons for '是' (Yes) and '非' (No), with '是' selected.
- '狀態' (Status): Radio buttons for '活躍' (Active) and '非活躍' (Inactive), with '活躍' selected.
- At the bottom right, there are two buttons: '儲存' (Save) and '取消' (Cancel).

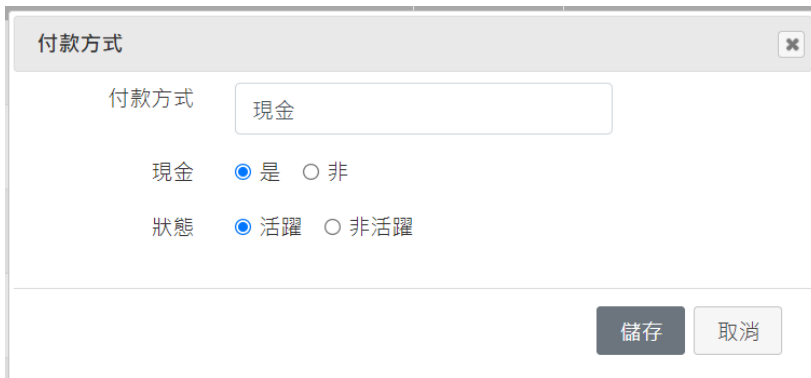
Enter a payment method name, select Cash, and Active status.

Edit Payment Method



To edit your payment method, click "Edit" at the top right of the page.

SmartBusiness – Setup



The editing interface is the same as the "Add" window, you can modify the information of the payment method.

Remove Payment Method



To remove a payment method, click "**Remove**" at the top right of the page.

The payment method will then be removed.

SmartBusiness – Setup

Receipt

Record

Setup

Email Settings

Other Settings

Payment Types

Receipt

User Management

Exchange Rate Setup

In the printing setup you can edit the information that is printed out of your company's invoices.

Click "Settings" > "Printing Bill Configuration".

發票設定

公司名稱	<input type="text" value="United Technologies (Int'l) Ltd."/>
地址	<input type="text" value="Rm1501, FL15, No.20 Westlands Rd.,"/> <input type="text" value="Quarry Bay, North Point, HK."/>
電話	<input type="text" value="29601002"/>
網址	<input type="text" value="https://united.com.hk"/>
抬頭訊息	<input type="text" value="歡迎光臨"/> <div style="border: 1px solid gray; height: 100px; width: 100%;"></div>
落款訊息	<input type="text" value="多謝惠顧"/> <input type="text"/>

On this page, you can edit the information of the invoice. Such as company name, address, phone number, etc.

SmartBusiness – Setup

The screenshot displays a web-based setup form. At the top, there is a large empty rectangular box. Below it, the form is divided into two main sections. The first section, labeled '免責聲明' (Disclaimer), contains a text input field with the text 'Cheques should be crossed and made payable to "UNITED TECHNOLOGIE...', followed by another text input field with 'Bank of China Account test', and a large greyed-out area below. The second section, labeled '付款條件' (Payment Terms), contains a text input field with 'In full upon confirmation, prior to service', followed by a text input field with 'test', and three more empty text input fields. At the bottom center of the form, a green button with the Chinese characters '儲存' (Save) is highlighted with a green rectangular border.


You can edit the disclaimer and payment terms below.

When finished, press "Save".

SmartBusiness – Setup

User Management

 Record

 Setup

Email Settings

Other Settings

Payment Types

Receipt

User Management

Exchange Rate Setup

"User Management" is a page for editing SB user permissions and information.

Click "Settings" > "User Management".

員工和訪問權限		
員工代碼	員工姓名	
admin	Administrator	編輯 移除
admin	Administrator 1	編輯 移除
admin	Administrator 2	編輯 移除
admin	Administrator	編輯 移除
manager01	Manager	編輯 移除
manager02	KOBEE	編輯 移除
sales01	Sammie	編輯 移除
sales02	Roy	編輯 移除
sales04	Ken	編輯 移除
sales05	Kim	編輯 移除
sales08	Vega	編輯 移除

Add a new user



Press Add to go to the Add page. After entering, you can enter information such as user name and email address.

After confirming that the data entry is correct, click "Save".

Edit the user

	編輯	移除
	編輯	移除
	編輯	移除
	編輯	移除

SmartBusiness – Setup

Press Edit to enter the editing page. After entering, you can change the user name, email and other information.

編輯銷售人員

用戶代碼
sales04

用戶名稱*
Ken

Email
enquiry@united.com.hk

從誰接收通知電子郵件
-- 選擇 --

修改密碼

訪問權限

前台銷售 退款 存貨 進查 貨品 客戶 報表 計算付款 訂金 資料傳送 (上傳) 資料傳送 (下載) 批發 採購

儲存

[回到列表](#)

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

After completing the edit, click **"Save"**.

Remove the user

	編輯 移除
	編輯 移除
	編輯 移除
	編輯 移除

Press **Delete User**.

SmartBusiness – Setup

Exchange Rate Setup

Record

Setup

Email Settings

Other Settings

Payment Types

Receipt

User Management

Exchange Rate Setup

Click **Settings** > **Exchange Rate Setup**.

Click **+** to create a new currency.

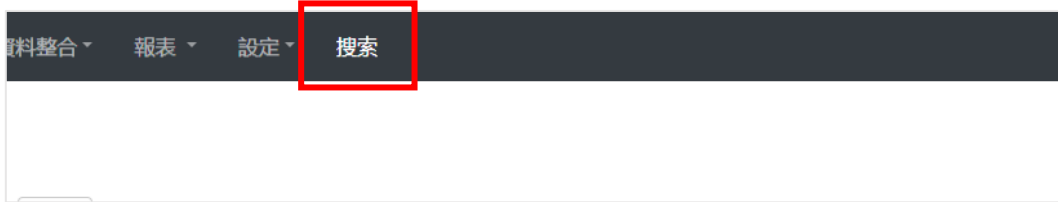
貨幣	匯率	
CNY	1.15	移除
HKD	1.00	移除
MOP	0.97081	移除
USD	7.81	移除

儲存

© 2023 | 明晉營通二代 | 由聯訊科技 (國際) 有限公司開發

SmartBusiness – 搜索

Search



In the navigation bar, press **Search**.

The Search page is used to search for receipts, serial numbers, and lot numbers.

Search for Receipt Number



In the search bar, select **Receipt Number**.

Enter the receipt number based on the information in the receipt.



SmartBusiness – 搜索

After the system searches, the receipt log will be displayed:

搜索

收據號碼 序號 批號

搜尋結果

	收據號碼	商品代碼	數量	價格	折扣%	金額	銷售日期	退款金額	退款日期	明細
1	KL100086	T0003	1	208.00	0.00	208.00	19/7/2023 12:00:00 am	0	N/A	<input type="button" value="明細"/>

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

Search for Serial Number

In the search bar, select **Serial No.**

搜索

收據號碼 序號 批號

收據號碼	商品代碼	數量	價格	折扣%	金額	銷售日期	退款金額	退款日期	明細
------	------	----	----	-----	----	------	------	------	----

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

Batch

office:T0004

Batch No.	Serial No. (Expiry Date)	Delivered Qty	Total Qty
test1	<input type="checkbox"/> test2 (2023-07-21) <input type="checkbox"/> test3 (2023-07-21) <input type="checkbox"/> test4 (2023-07-21) <input type="checkbox"/> test5 (2023-07-21) <input type="checkbox"/> test6 (2023-07-21) <input type="checkbox"/> test7 (2023-07-21) <input type="checkbox"/> test8 (2023-07-21) <input type="checkbox"/> test9 (2023-07-21)	1	9
test1	<input type="checkbox"/> test2 (2023-07-21) <input type="checkbox"/> test3 (2023-07-21) <input type="checkbox"/> test4 (2023-07-21) <input type="checkbox"/> test5 (2023-07-21) <input type="checkbox"/> test6 (2023-07-21) <input type="checkbox"/> test7 (2023-07-21) <input type="checkbox"/> test8 (2023-07-21) <input type="checkbox"/> test9 (2023-07-21)	1	9

Delivery Qty

Search for Batch Number

In the search bar, select **Batch No.**

搜索

收據號碼 序號 批號

搜索

收據號碼	商品代碼	數量	價格	折扣%	金額	銷售日期	退款金額	退款日期	明細
------	------	----	----	-----	----	------	------	------	----

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

前台銷售

客戶: GUEST | GUEST 積分: 0 | 價格級別

如要負數金額, 請設定數量為負數。

商品代碼	描述	基
1	COSTAR00001	COSTAR 升級版 強效緊緻霜...
2		

備注: | 內部備注:

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

批次

office: COSTAR00001

批號	到期日 (採購單/數量)	已出貨數量	總共數量
BAT00001	2025-07-14 (IP100069/2) 0	1	3
	2023-12-31 (IP100069/3) 0		
BAT00001	2025-07-14 (IP100069/2) 0	1	3
	2023-12-31 (IP100069/3) 0		
LOT001	2025-12-31 (IP100067/4) 0	1	4
LOT002	2025-12-30 (IP100067/1) 0	1	1

送貨數量: 0

確定 取消

According to the information in the receipt, enter the batch number.

搜索

收據號碼 序號 批號

LOT001 搜索

收據號碼	商品代碼	數量	價格	折扣%	金額	銷售日期	退款金額	退款日期	明細
------	------	----	----	-----	----	------	------	------	----

© 2023 | SmartBusiness | 由聯訊科技 (國際) 有限公司開發

SmartBusiness – Contact Us

Contact Us

If you encounter any difficulties when using SmartBusiness, or have any questions about SmartBusiness, please do not hesitate to contact us, we are happy to assist you.

United Technologies (Int'l) Limited

Chinese Name: 聯訊科技 (國際) 有限公司

Unit 1501, Westlands Centre, 20 Westlands Road, Quarry Bay, Hong Kong

Contact: +852 2960 1002

Email: enquiry@united.com.hk

Website: <https://www.united.com.hk/>