



OFCCOM Solution CRM x ofcom20.dyndns.org:8080/ofcomcrm/notifications/departmentindex

Task action list

Task
Manage tasks such as add new task, set task as complete and view pending task

Task Management
View list of pending task sort by department

Task
You got 2 task(s)

From	To	Subject	Deadline
		Process customer payment	

Dashboard
Task
Marketing Activity
Customer
Sales
Inventory
Purchase Order
Accounting
Report
E-Payroll

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Marketing Activity action list

Marketing Activity
List of marketing activities such as adding new appointment and sales trip

- Calendar**
Calendar listing all upcoming activities for this month
- Add New Sales Visit**
Add new sales visit for sales person
- Add New Appointment**
Add new appointments for sales person
- Sales Visits**
Sales Visits
- Appointments**
Appointments

Task
You got 2 task(s)

From	To	Subject	Deadline
		Process customer payment	

Dashboard
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New Appointment

All fields are required.

Customer: [Dropdown]

Sales Person: Allison [Dropdown]

Description: [Text Area]

Type: Phone Call [Dropdown]

Status: New [Dropdown]

From Time: [Text] (HH:mm Eg: 13:30)

To Time: [Text] (HH:mm Eg: 14:30)

Save Cancel

Dashboard

Task

Marketing Activity

Customer

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Accounting

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E-Payroll

Activities

Filter by:- Sales Person: --All--

<< Year		Year >>	
<< Month		Month >>	
Mon	Tue	Sat	Sun
		3	4
6		10	11
13	14	15	16
		17	18
			19

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Customer action list

Customer
Customer management such as add lead (potential) customer, add new customer, view list of customer and add new contact

- Leads**
Show list of potential customer (called leads) met by sales person during their sales
- Import Leads**
Convert leads into an actual customer
- Contacts**
List of contacts for each customers
- SMS Templates**
SMS Template setting
- Email Templates**
Email template setting
- Customers**
List of existing customer
- Import Customer**
From CSV file convert it into customer
- SMS Template Groups**
SMS Template Group management
- Send SMS**
Sending SMS in a glance
- Send Email**
Sending email with pre-set templates

Dashboard

Task

Marketing Activity

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E-Payroll

Activities

Filter by:- Sales Person: --All--

<< Year		Year >>	
<< Month		Month >>	
Mon	Tue	Sat	Sun
		4	5
		11	12
		18	19

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Add new lead

Main Information **Contacts (0)**

Main information

Customer code : Auto generate
 Source : -Select One-
 Customer name :
 Customer description : short description about this customer
 Customer PIC : person in charge (PIC)
 Office Contact :
 Fax :
 Email :

Address

Country : Malaysia
 State :
 City :
 Postcode :
 Address :

Additional information

No. Of Employee : 00 - 20
 Agent name :
 Sales person : Alison
sales representative in-charge of this customer

[Submit and save lead](#)

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Add new lead

Main information **Contacts (0)**

Action	Name	Contact	Remarks
Delete	Salutation : Name : Title / Position :	Office phone : Mobile phone : Email :	
Delete	Salutation : Name : Title / Position :	Office phone : Mobile phone : Email :	

[Add more contact](#)

[Submit and save lead](#)

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Add new customer

Main information **Contacts (0)** Site/Shipping information Additional information

Main information

Source : -Select One-
 Customer name :
 Customer description : short description about this customer
 Customer code :
 Customer PIC : person in charge (PIC)
 Office Contact :
 Fax :
 Email :

Address

Country : Malaysia
 State :
 City :
 Postcode :
 Address :

Submit and save customer

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Compose SMS Message

Select template group: Select Template Group

To (Select Customer Source)	Select All Advertising Mailer Bunting/Billboard Website Word of Mouth
Recipient	
Content	

SMS 0 (160 characters left)
 Optional : please type [Salutation] and/or [ContactName] where you wish the salutation/contact name to be inserted.

Send

Task
Marketing Activity
Customer
Sales
Inventory
Purchase Order
Accounting
Report
E-Payroll
E-Leave
CEO Desktop

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Sales action list

Sales
Sales activities such as quotation, sales order, delivery order, invoice and also receipting

- Quote**
View list of quotations
- Quotation**
View list of quotations
- Sales Order**
- Delivery Order**
- Invoices**
- Receipting**
- Quotation templates**
View list of quotation template, can view the details, edit it and also to add new

- New Quotation**
- New Sales Order**
- New Delivery Order**
- New Invoice**
- New Receipting**

Send

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Quotation list

Create new quotation

Created: Auto create from quotation Q1066 until
 Valid date: Auto create from quotation Q1068 until
 Quotation Template A
 Quotation: Auto create from quotation Q1076
 Status: Auto create from quotation Q1083
 Auto create from quotation Q1128
 Auto create from quotation Q1135
 Auto create from quotation Q1136
 Sales person:

Customer name :
 Contact person name :
 Item name :

Search

< Back 1 2 3 Next > 54 record(s) found

Quote no	Quote date	Status	Valid until	Customer	Contact person	Total items	Grand total	Last updated	Salesperson	Action
Q1142	23 Mar 2015	Completed	30 Apr 2015	ED Software Sdn Bhd	Mr Tan	2	600.00	23 Mar 2015	Alison	Edit Delete
Q1141	20 Jan 2015	Completed	28 Feb 2015	ABCDEF Sdn	Mr tan	1	500.00	20 Jan 2015	Alison	Edit Delete

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Add new quotation

Customer Main information Product

Create from quotation template :

Customer information - Billing address

Customer name :

Country :

State :

City :

Postcode :

Street address :

Contact person (CP) :

PC email :

Delivery address

Use Billing Address

Use this quotation as template

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Add new quotation

Customer Main information Product

Pricebook :

Product information

Action	Item	Item detail	Quantity	UOM	Price	Discount by	Profit Margin (%)	Total	
								Total	0.00

Use this quotation as template

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Inventory action list

Inventory
Product management such as product listing, add new product, stock in/out, price enquiry and product history

- Import items (part, package, product)**
Import part, package and products from excel file
- Products**
View list of products and also able to add new product
- Price Book**
Price book is combine few products to create one combo price
- Products stock card**
Product history status such as stock in/out, price adjustment and manual price/stock adjustment
- Product categories**
List of product categories. Can add new categories too
- Parts**
View list of parts (an sub item for product), can add and edit from here
- Packages**
One package have many products and parts, can view the list, add and edit from here
- Stock In/Out**
Manual adjustment for product stock in/out. Use receiving for official stock in/out
- Price enquiry**
Product purchase price comparison table. Show list of same product from different supplier

Profit Margin (%) Total

Total	0.00
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Dashboard

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List of products before stock update
Choose which product you want to manually adjust the stock

Search :

Category :

Supplier :

< Back 1 Next > 7 record(s) found

Item name	Code	Image	Category	Brand	Default price	Cheapest supplier	Quantity on hand	Modified	Action
A11 Coating Belt	AGB2356		Air Compressor	Yamaha	500.00	B.KOK (RM 150.00)	(pcs) 63	12 Nov 2014	Update
Rotating gear	RG5567		Diamond Cutter	Castrol	100.00	B.KOK (RM 50.00)	(pcs) 142	12 Nov 2014	Update
Bar Cutter 32mm	BC3345		7TM Concrete Mixer	Yokohama	200.00	CENTURY (RM 90.00)	(pcs) 1000	17 Apr 2014	Update
Genset	GG4456		7TM Concrete Mixer	Castrol	900.00	-	(pcs) 1441	12 Nov 2014	Update
Iron molding	IM9785		7TM Concrete Mixer	Yokohama	500.00	-	(pcs) 9	12 Nov 2014	Update
G2Pack	G2Pack		7TM Concrete Mixer		1,500.00	-	(pcs) 100	24 Dec 2013	Update
Concrete Mixer HC	HC		7TM Concrete Mixer		10,000.00	-	(pcs) 0	02 Jul 2014	Update

Dashboard

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Purchase Order action list

Purchase Order

- Purchase Orders**
List of purchase orders
- Supplier**
List of suppliers
- Goods Received (Receivings)**
Stock in/good received, usually comes from supplier/vendor as your purchase order
- New Purchase Order**
Add new purchase orders
- New Supplier**
Add a new supplier
- New Receiving**
Receive new goods/stock from supplier/vendors can be add here

gratulation!!!
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image

Quantity on hand	Modified	Action
(pcs) 63	12 Nov 2014	Update
(pcs) 142	12 Nov 2014	Update
(cs) 1000	17 Apr 2014	Update
(cs) 1441	12 Nov 2014	Update
(pcs) 9	12 Nov 2014	Update
(pcs) 100	24 Dec 2013	Update
(pcs) 0	02 Jul 2014	Update

G2Pack	G2Pack	7TM Concrete Mixer	1,500.00	-		
Concrete Mixer HC	HC	7TM Concrete Mixer	10,000.00	-		

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Add new purchase order

Main Information
 PO No : PO no is auto generated
 Issue date : 2015-04-01 date format: yyyy-mm-dd
 Status : Created
 Description : Short description for this purchase and purpose

Vendor Information
 Vendor Name :
 Country & State : Country State
 City & Postcode : City Postcode
 Street Address :

Shipping Information
 Shipping Name : OFCOM Solution CRM
 Country & State : Malaysia Selangor
 City & Postcode : Puchong 47170
 Street Address : B-3A-7, IOI Boulevard, Jalan Kenari 5, Bandar Puchong Jaya

Additional Information (if any)
 Remark :

Contact Information
 PIC Name : Toh Seng Choon
 PIC contact no : +6012.212.3169

Items Information

Action	Item	Item description (if any)	Quantity	UOM	Price	Total
						Total:

Add product Add text

Submit and save this purchase order

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Report action list

Report

- Contact mailing list**
View list of contact with their details
- Potential report**
List of quotation send out to customers/leads where they not yet confirm
- Lead by ownership**
View list of leads (potential customers)
- Items report**
Products, Parts and Package report
- Quotation summary report**
View number of quotation issued, transfer to order and many more

Price Total

Total:

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Customer

Issue date : 2015-04-01 date format: yyyy-mm-dd

Status : Created

My Profile action list

My Profile

- View My Profile**
- Change Password**
Change your password here
- Logout**
Click here to logout from the system

Price Total

Total:

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Issue date : 2015-04-01 (date format: yyyy-mm-dd)
 Status : Created

Settings action list

Settings

- Department**
Company Division
- Email template**
Edit and manage email template
- Set user access control**
Set who can access what module
- Company Profile**
This company basic information such as address, company name, company no and also working days
- Public Holidays**
List of public holidays registered under the system
- Users**
List of users in the system and also can add a new user
- Employees**
View list of employee and also able to add new
- Menu management**
Interface to add, delete or sort left menu panel

Price Total
Total:

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Basic Information

Company No. : PC-0492304
 Name : OFCOM Solution CRM
 Tel. : +6012.212.3169
 Fax : +6017.753.1233
 Address : B-3A-7, 101 Boulevard, Jalan Kenari 5, Bandar Puchong Jaya
 City : Puchong
 Post Code : 47170
 State : Selangor
 Country : Malaysia

Other Information

Working days per month : 24
 Monday : Yes
 Tuesday : Yes
 Wednesday : Yes
 Thursday : Yes
 Friday : Yes
 Saturday : No
 Sunday : No

[Edit Company](#)