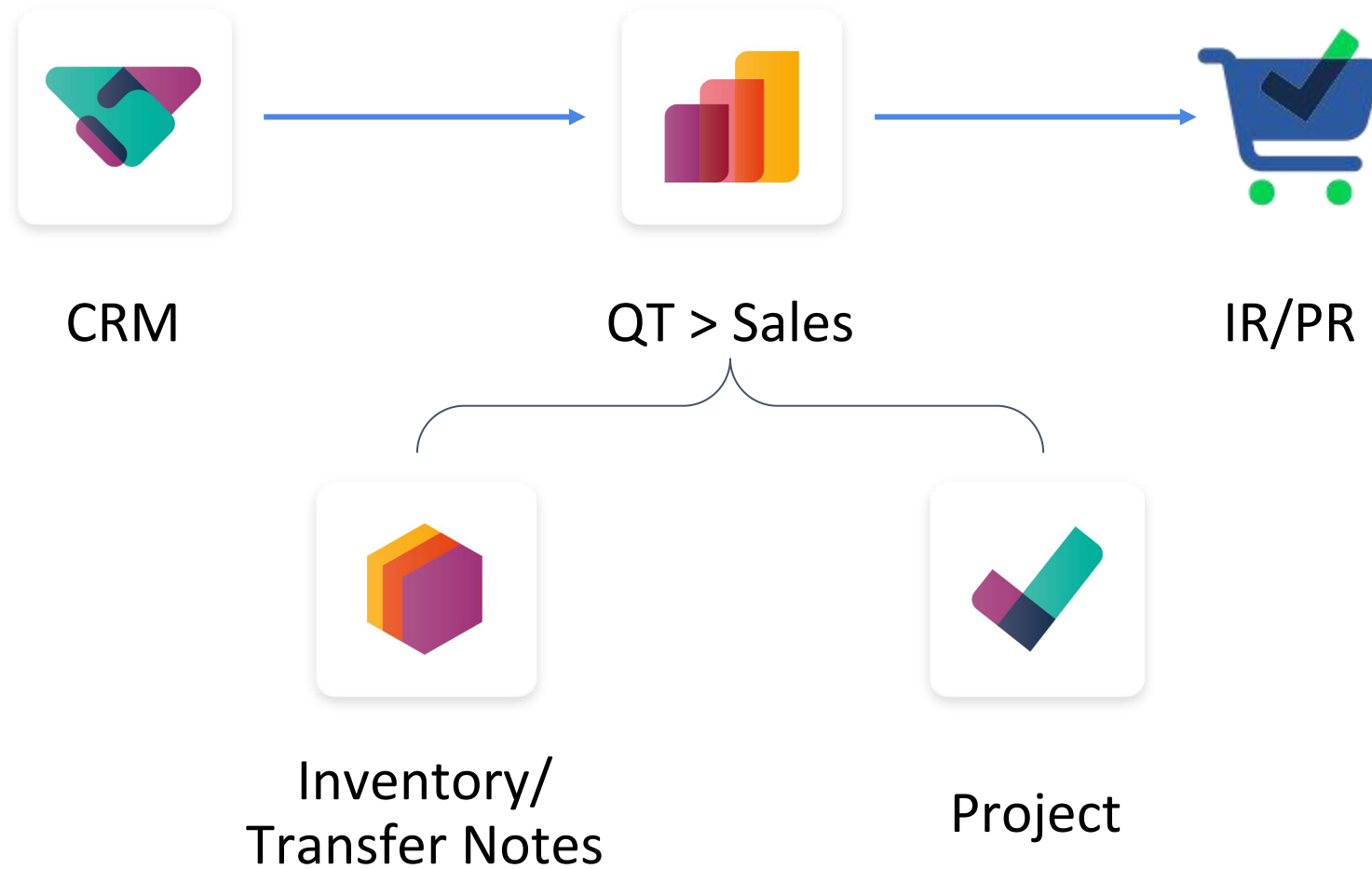


CRM & Sales Module

helps to organize your sales activities, track leads, close opportunities and get accurate forecasts

Flow of Sales



CRM – Create New Leads (new Customer Contact)

CRM Sales Reporting Configuration Inquiry Report

Click “New” button to generated add new lead (contact)

New Generate Leads Pipeline

Search My Pipeline Search...

Haziq eepcTestServer3

New	Qualified	Proposition	Completed	Lost Job
333k	1,353k	678k		0

Organization / Contact ?

Company A

Opportunity ?

Company A's opportunity

Email ?

e.g. "email@address.com"

Phone ?

0129655544

Expected Revenue ?

RM1,230,000.00

Add Edit

Company A's opportunity

RM 123,000.00

Company A

Trading

☆☆☆

H

Company A's opportunity

RM 1,230,000.00

Company A

Project

☆☆☆

H

Company A's opportunity

RM 123,000.00

Company A

Trading

☆☆☆

H

Company A's opportunity

RM 555,200.00

Company A

Adhoc Service

☆☆☆

H

Fill in the organization or contact of a new opportunity.

Click “ADD” button to save.

MALAYSIA MARINE AND HEAVY ENGINEERING's opportunity

RM 333,300.00

Company A

CRM – Edit Leads

CRM Sales Reporting Configuration Inquiry Report

New Generate Leads Pipeline

My Pipeline Search...

Haziq eepcTestServer3

New + 1,563k Qualified + 1,353k Proposition + 678k Completed + 0 Lost Job

NEW LEADS

- MALAYSIA MARINE AND HEAVY ENGINEERING's opportunity**
RM 333,300.00
Company A
Contract
★★★★☆
- Company A's opportunity**
RM 1,230,000.00
Company A
Trading
☆☆☆☆

QUALIFIED LEADS

- Company A's opportunity**
RM 123,000.00
Company A
Trading
★★★☆☆
- Company A's opportunity**
RM 1,230,000.00
Company A
Project
☆☆☆☆

PROPOSITIONS

- Company A's opportunity**
RM 555,200.00
Company A
Adhoc Service
★★★☆☆
- Company A's opportunity**
RM 123,000.00
Company A
Trading
☆☆☆☆

EDIT/DELETE MENU

- Edit
- Delete

INSTRUCTIONS:

1. Click "Edit" button to edit documents
2. Click "Delete" button to delete pipeline

Double click to issue a new quotation.

CRM – Issue New Quotation (Trading/Adhoc service/Project)

CRM

Sales

Reporting

Configuration

Inquiry Report

Create new quotation of sale/rental order

New Pipeline Company A's opportunity

No Meeting

Quotations 0

Rentals 0

Similar Leads 5

2 / 6

New Quotation

Won

Lost

New 4m

Qualified

Proposition

Completed

Lost Job

Won

Send message

Log note

Activities

Following

Company A's opportunity

Expected Revenue ?
RM1,230,000.00

Probability ?
at 95.45 %

Customer ?
Company A
Johor
MALAYSIA

Salesperson ?
H Haziq

Lead Type ?
Trading

Expected Closing ?
☆☆☆

Agent ?

Tags ?

Area ?

Email ?

Phone ?
0129655544

Internal Notes

Extra Information

Attachment

Customer Inquiry Report

Add a description...

Today

H Haziq - 4 minutes ago
Lead/Opportunity created

Important Information must update before Issue a "NEW QUOTATION"

- Lead Type : Project, Adhoc Service, Trading and Contract.
- Email
- Phone Number
- Salesperson
- Agent
- Area
- Contract Sum, Contract Date & Contract type (For lead type = Contract)

CRM – Issue New Quotation (Contract)

CRM

Sales

Reporting

Configuration

Inquiry Report

Create new quotation of sale/rental order

New

Pipeline

MALAYSIA MARINE AND HEAVY ENGINEERING's ...

No Meeting

Quotations0

OrdersRM 11,750.00

Rentals0

Similar Leads5

1 / 6

New Quotation

Won

Lost

Extend Contract

New 8d

Qualified

Proposition

Completed

Lost Job

Won

Send message

Log note

Activities

Search

1

Following

MALAYSIA MARINE AND HEAVY ENGINEERING's opportunity

Expected Revenue ?

RM333,300.00

Probability ?

at 95.45 %

Customer ?

Company A

Johor

MALAYSIA

Lead Type ?

Contract

Agent ?

Sofiya

Area ?

M-S

Contract Sum ?

123,000.00

Email ?

Phone ?

0129655544

Salesperson ?

H Haziq

Expected Closing ?

★★★★

Tags ?

Contract Date ?

01/11/2024 → 26/12/2030

Contract Types ?

Adhoc Service X Trading X

Internal Notes

Extra Information

Attachment

Customer Inquiry Report

February 13, 2025

H Haziq - 8 days ago

0.00 → 123,000.00 (Sum for the contract)

Trading → Contract (Lead Type)

H Haziq - 8 days ago

MALAYSIA MARINE AND HEAVY ENGINEERING → Company A (Customer)

MALAYSIA MARINE AND HEAVY ENGINEERING → Company A (Company Name)

07-268 2111 → 0129655544 (Phone)

H Haziq - 8 days ago

Lead/Opportunity created

Important Information must update before Issue a "NEW QUOTATION"

Lead Type : Project, Adhoc Service, Trading and Contract.

Email

Phone Number

Salesperson

Agent

Area

Contract Sum, Contract Date & Contract type (For lead type = Contract)

CRM – Send Quotation

Sales Orders To Invoice Products Reporting Charge Code Configuration

Quotations
QT-2025-00088 ⚙️

Item Request 0 Revisions 0

Send by Email **Convert Currency** **Confirm** Cancel

Draft Quotation Sales Order Revised

QT-2025-00088

Customer ?	Company A Johor MALAYSIA	Expiration ?	23/03/2025
Job ?	SS01	Quotation Date ?	21/02/2025 16:14:55
Sub Job ?	DD09	Pricelist ?	Default MYR pricelist (MYR)
Ref ?		Payment Terms ?	
Project Code ?	ZZ02	Business Group ?	Spare Part
Doc No ?		Business Unit ?	Air Compressor
CPO Number ?		Product Brand ?	SULLAIR
Proposal Type ?		Charge Code ?	SP-AC-10
Agent ?		Cover Page ?	Upload your file
Area ?		Lead Type ?	Trading
Invoice Address ?	Company A		
Delivery Address ?	Company A		
User who approved ?			

Confirm QT (State will change to Quotation)

Confirm QT (State will change to Quotation)

On draft & Quotation state still allow salesman to edit every field

CRM – Send Quotation

The screenshot displays a CRM application interface. At the top, a navigation bar includes links for CRM, Sales, Reporting, Configuration, and Inquiry Report. On the right, there are notification icons with counts (12, 3) and a user profile for 'Haziq' with the email 'eepcTestServer3'. Below the navigation bar, a breadcrumb trail shows 'Pipeline / Company A's opportunity' and 'QT-2025-00088'. A secondary bar contains 'Item Request' (0) and 'Revisions' (0) buttons. The main content area features a workflow with steps: Draft, Quotation, Sales Order, and Revised. Action buttons include 'Send by Email', 'Convert Currency', 'Confirm', 'Cancel', 'Send message', 'Log note', and 'Activities'. A sidebar on the left lists customer details for 'Company A' in 'Johor MALAYSIA', including Job (SS01), Sub Job (DD09), Ref, Project Code (ZZ02), Doc No, CPO Number, Proposal Type, Agent, Area, Invoice Address, and Delivery Address. A modal window titled 'Currency Exchange' is open, showing 'Sale Order: QT-2025-00088', 'Currency: MYR', and 'Currency Rate: 1.00'. At the bottom of the modal are 'Exchange Currency' and 'Cancel' buttons. A text overlay on the modal states: 'Sales able to put their own rate to convert'.

CRM Sales Reporting Configuration Inquiry Report

Pipeline / Company A's opportunity
QT-2025-00088

Item Request 0 Revisions 0

1 / 1 < >

Send by Email Convert Currency Confirm Cancel Draft Quotation Sales Order Revised Send message Log note Activities

QT-2025-00088

Customer? Company A
Johor
MALAYSIA

Job? SS01

Sub Job? DD09

Ref?

Project Code? ZZ02

Doc No?

CPO Number?

Proposal Type?

Agent?

Area?

Invoice Address? Company A

Delivery Address? Company A

Charge Code? SP-AC-10

Cover Page? Upload your file

Lead Type? Trading

Today

Currency Exchange

Sale Order: ? QT-2025-00088

Currency: ? MYR

Currency Rate: ? 1.00

Exchange Currency Cancel

Sales able to put their own rate to convert

CRM – Order lines

CRM

Sales

Reporting

Configuration

Inquiry Report

Pipeline / Company A's opportunity

QT-2025-00088

Item Request

0

Revisions

0

Haziq

eeepcTestServer3

1 / 1

<

>

User who approved ?

Revision Count ?

0

Latest Revision Count ?

0

Original Order Reference ?

Revision Amount Difference ?

0.00

Sales team able to view the analytical value of this sales order

Order Lines

Optional Products

Other Info

CPO

Attachment

Customer Signature

Product	Description	Quantity	UoM	Unit Price	End User D...	Taxes	Discount	Tax excl.	
[asdsa-02322...	Product A	5.00	UNITS	500.00			0.00	RM 2,500.00	
[asdsa-02322...	Product B	4.00	UNITS	200.00			0.00	RM 800.00	
<div>Add a productAdd a sectionAdd a noteCatalog</div>									
Terms and conditions...								Total:	RM 3,300.00

Send message

Log note

Activities

Following

Today

Haziq

- 1 minute ago

Quotation sent

Draft

→

Quotation

(status)








Haziq

- 1 hour ago

Sales Order created

Sales team able to add a product/service in the order lines tab

CRM – Order lines

Order Lines		Optional Products	Other Info	CPO	Attachment	Customer Signature		
Product	Description	Quantity	UoM	Unit Price	End User D...	Taxes	Discount	Tax excl. 
 [asdsa-02322...	Product A	5.00	 UNITS	500.00			0.00	RM 2,500.00 
 [asdsa-02322...	Product B	4.00	 UNITS	200.00			0.00	RM 800.00 
Add a product Add a section Add a note Catalog								
<div>Button to add a line in the sales order</div>								
Terms and conditions...							Total:	RM 3,300.00

For storable product, there will have the forecast button to see the current stock move

QT – Optional Product

- Put a suggestion product for the customer within the system only. It will not print on the Sales order.
- The trolley icon allow to at the product line into the Sales Order

Order Lines	Optional Products	Other Info	CPO	Attachment	Customer Signature
Product	Description	Quantity	UoM	Unit Price	
☰ [037050] MOB & DEMO...	[037050] MOB & DEMOB CHARGES (OFFSHORE) MOB & DEMOB CHARGES (OFFSHORE)	1.00	TRIP	1.00	🛒 🗑️
☰ [10-10-023256] ELEM, T...	[10-10-023256] ELEM, THERMAL 120 DEG F VS P/N: 88291005-301 ELEM, THERMAL 120 DEG F VS	1.00	EA	78.98	🛒 🗑️
Add a product					

QT – Attachment

- Allow salesman to upload other file to keep under this sales order

Sales

Orders

To Invoice

Products

Reporting

Charge Code

Configuration

7

1

H

Quotations

QT-2024-00547

Item Request

0

Revisions

0

Draft BOM

1

6 / 19

<

>

Revision Amount

0.00

Legal

QT-2024-00547 || Pending

Difference

Legal Comment

Order Lines

Optional Products

Other Info

CPO

Requirement

Attachment

Name

File

Filename

Add a line

Send message

Log note

Activities

1

Following

QT – CPO

(Sales Team or Application Team must "ACKNOWLEDGE" the CPO before this quotation can be converted to sales.)

- Click "Add a line" , update the CPO number and upload the CPO document and save.

The screenshot displays the 'Create Customer PO' modal within a CRM application. The background shows the CRM interface with tabs for CRM, Sales, Reporting, Configuration, and Inquiry Report. The modal is titled 'Create Customer PO' and features a status bar with 'Acknowledged' selected. Below the status bar, there is a 'CPO Number...' input field, a 'CPO Received Date' field, and two upload buttons: 'File' and 'File with Prices'. A 'Must:' section lists the following requirements:

- Enter the CPO Number
- CPO Received Date
- Upload CPO document
 - File – unprice (If not require, upload the same file with prices)
 - File with Prices

At the bottom of the modal, there are three buttons: 'Save & Close', 'Save & New', and 'Discard'. The 'Save & Close' and 'Save & New' buttons are highlighted with a red box.

CRM > Confirm Sales Quotation

Confirm

Convert Currency

Send by Email

Cancel

Draft

Quotation

Sales Order

Revised

QT-2025-00088

Customer ?	Company A Johor MALAYSIA	Expiration ?	23/03/2025
Job ?	SS01	Quotation Date ?	21/02/2025 16:14:55
Sub Job ?	DD09	Pricelist ?	Default MYR pricelist (MYR)
Ref ?		Payment Terms ?	
Project Code ?	ZZ02	Business Group ?	Spare Part
Doc No ?		Business Unit ?	Air Compressor
CPO Number ?		Product Brand ?	SULLAIR
Proposal Type ?		Charge Code ?	SP-AC-10
Agent ?		Cover Page ?	<div>Upload your file</div>
Area ?		Lead Type ?	Trading
Invoice Address ?	Company A		
Delivery Address ?	Company A		

Send message

Log note

Activities

1 Following

- Today
- Haziq

- 44 minutes ago

Quotation sent

Draft

 →

Quotation

 (status)
- Haziq

- 1 hour ago

Sales Order created

CRM > Confirm Sales Quotation

1. CRM > Sales > My Quotations
2. Select the quotation with number "QT-2024-00543" , click "CPO" , click "Add a line" , update the CPO number and upload the CPO document.

The screenshot displays the CRM interface for managing sales quotations. The top navigation bar includes 'Sales', 'Orders', 'To Invoice', 'Products', 'Reporting', 'Charge Code', and 'Configuration'. The 'My Quotations' search bar is visible. The list of quotations shows columns for Number, Sales Teams, Order Date, Customer, Salesperson, Activities, Sub J..., Customer PO, Charge Code, Delivery, Total, and status. The quotation QT-2024-00543 is highlighted in the list. The details view for QT-2024-00543 is shown below the list, with the 'Confirm' button highlighted in a red box. The details view includes sections for Customer, Job, Sub Job, Ref, Project Code, Doc No, CPO Number, Proposal Type, Invoice Address, and Delivery Address. The 'CPO' section is highlighted with a red box, showing the 'CPO Number' and 'Lead Type' fields. A red arrow points from the 'QT-2024-00543' row in the list to the details view.

Number	Sales Teams	Order Date	Customer	Salesperson	Activities	Sub J...	Customer PO	Charge Code	Delivery	Total	status
QT-2024-00543	Haziq	12/20/2024 08:14:55	COMPANY ASSOCIATION SDN BHD A, ...	Haziq	nh	jjh		MP-AC-50	0 %	RM 0.00	Draft
QT-2024-00542	Haziq	12/19/2024 16:18:47	COMPANY ASSOCIATION SDN BHD A, ...	Haziq	SS10	SJ23		MP-AC-10	0 %	RM 915.26	Draft
QT-2024-00540	Haziq	12/19/2024 16:18:47	COMPANY ASSOCIATION SDN BHD A, ...	Haziq					0 %	RM 592.00	Draft
SO-2024-00453		12/18/2024 16:18:47	COMPANY ASSOCIATION SDN BHD A, ...								
SO-2024-00446_R1		12/18/2024 16:18:47	COMPANY ASSOCIATION SDN BHD A, ...								
SO-2024-00448		12/18/2024 16:18:47	COMPANY ASSOCIATION SDN BHD A, ...								
SO-2024-00447		12/18/2024 16:18:47	COMPANY ASSOCIATION SDN BHD A, ...								
SO-2024-00446		12/18/2024 08:14:55	COMPANY ASSOCIATION SDN BHD A, ...								
SO-2024-00445		12/18/2024 08:14:55	COMPANY ASSOCIATION SDN BHD A, ...								
QT-2024-00530		12/17/2024 16:18:47	COMPANY ASSOCIATION SDN BHD A, ...								
SO-2024-00444		12/17/2024 16:18:47	COMPANY ASSOCIATION SDN BHD A, ...								

QT-2024-00543

Customer COMPANY ASSOCIATION SDN BHD A, PARTI
JALAN A, TAMAN B
KAMPUNG C
BANDAR D KUL 55100
Malaysia

Job SS10

Sub Job SJ23

Ref SO/12/U1

Project Code

Doc No

CPO Number

Proposal Type

Invoice Address COMPANY ASSOCIATION SDN BHD A, INVOI

Delivery Address COMPANY ASSOCIATION SDN BHD A, DELIV

Expiration 01/19/2025

Quotation Date 12/20/2024 08:14:55

Pricelist Default MYR pricelist (MYR)

Payment Terms

Business Group Man Power

Business Unit Air Compressor

Product Brand SULLAIR

Charge Code MP-AC-10

Cover Page Upload your file

Lead Type Trading

Revision Count 0

TIPS : Sales with "Leads Type" : Project, Adhoc Service and Contract, system will auto generate a "Project". System will notify the "Project Team" a new project created.

Overview Of Lead Type - Project

CRM

Sales

Reporting

Configuration

Inquiry Report

New

Pipeline

PARTNER A's opportunity

No Meeting

Quotations1

OrdersRM 1,041.26

Similar Leads3

2 / 5

<

>

New Quotation

Won

Lost

New 5d

Qualified

Proposition

Lost Job

Won

PARTNER A's opportunity

Expected Revenue

RM1,250,000.00

Probability

at 50.00 %

Customer?

COMPANY ASSOCIATION SDN BHD A, PARTNER A
JALAN A, TAMAN B
KAMPUNG C
BANDAR D KUL 55100
Malaysia

Lead Type?

Project

Email

partnerA@gmail.com

Phone

Internal Notes

Extra Information

Attachment

Customer Inquiry Report

Add a description...

Salesperson

H Haziq

Expected Closing?

★★★★

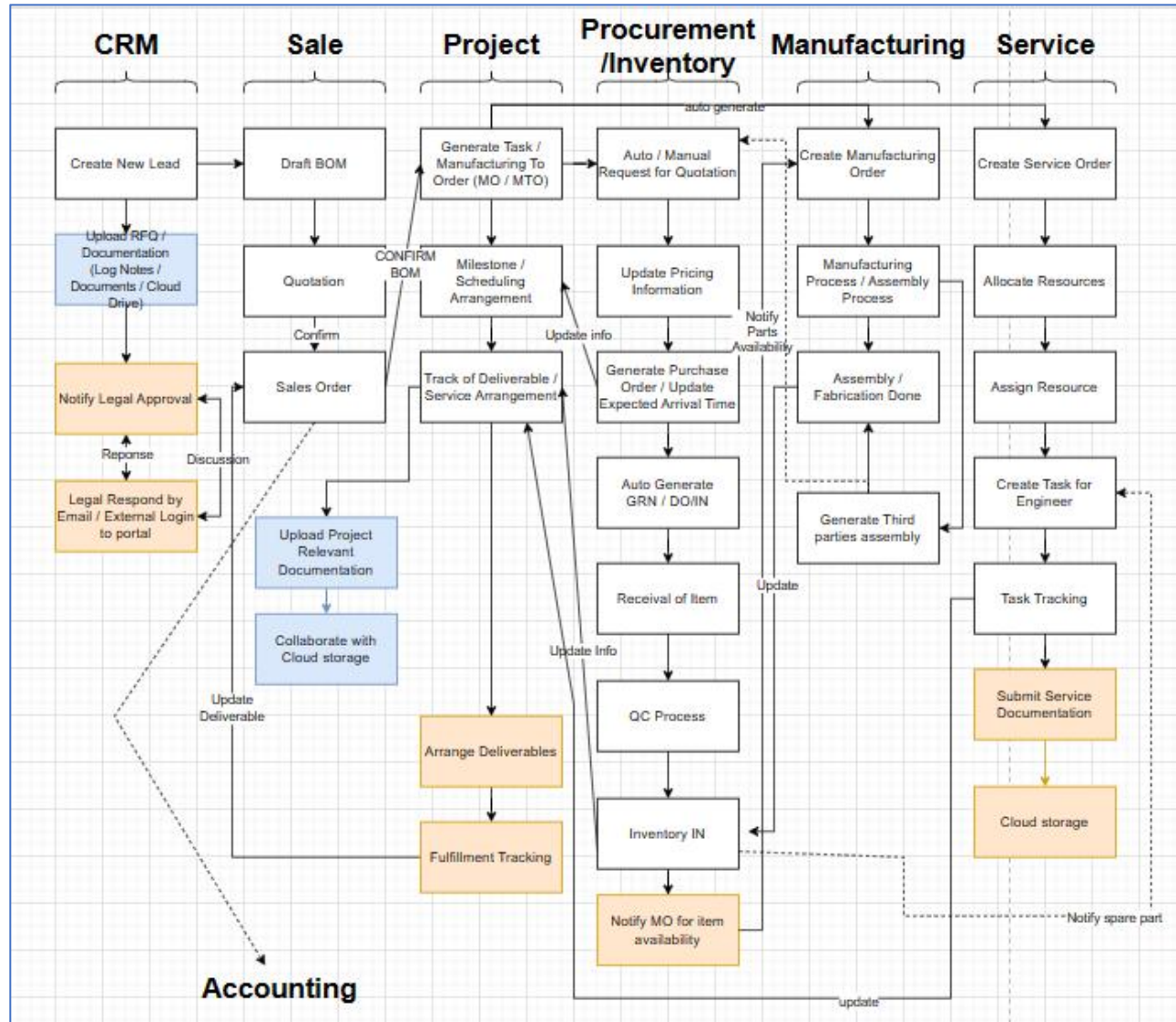
Tags?

Total Price

0.00

Lead Type : Project Flowchart

This is the flowchart for quotation(s) with Lead Type "Project".



Quotation with Lead Type: Adhoc Service

CRM

Sales

Reporting

Configuration

Inquiry Report

New

Pipeline

PARTNER A's opportunity

No Meeting

Quotations1

OrdersRM 1,041.26

Similar Leads3

2 / 5

New Quotation

Won

Lost

New 5d

Qualified

Proposition

Lost Job

Won

PARTNER A's opportunity

Expected Revenue

RM1,250,000.00

Probability

at 50.00 %

Customer ?

COMPANY ASSOCIATION SDN BHD A, PARTNER A
JALAN A, TAMAN B
KAMPUNG C
BANDAR D KUL 55100
Malaysia

Lead Type ?

Adhoc Service

Email

partnerA@gmail.com

Phone

Internal Notes

Extra Information

Attachment

Customer Inquiry Report

Add a description...

Salesperson

H Haziq

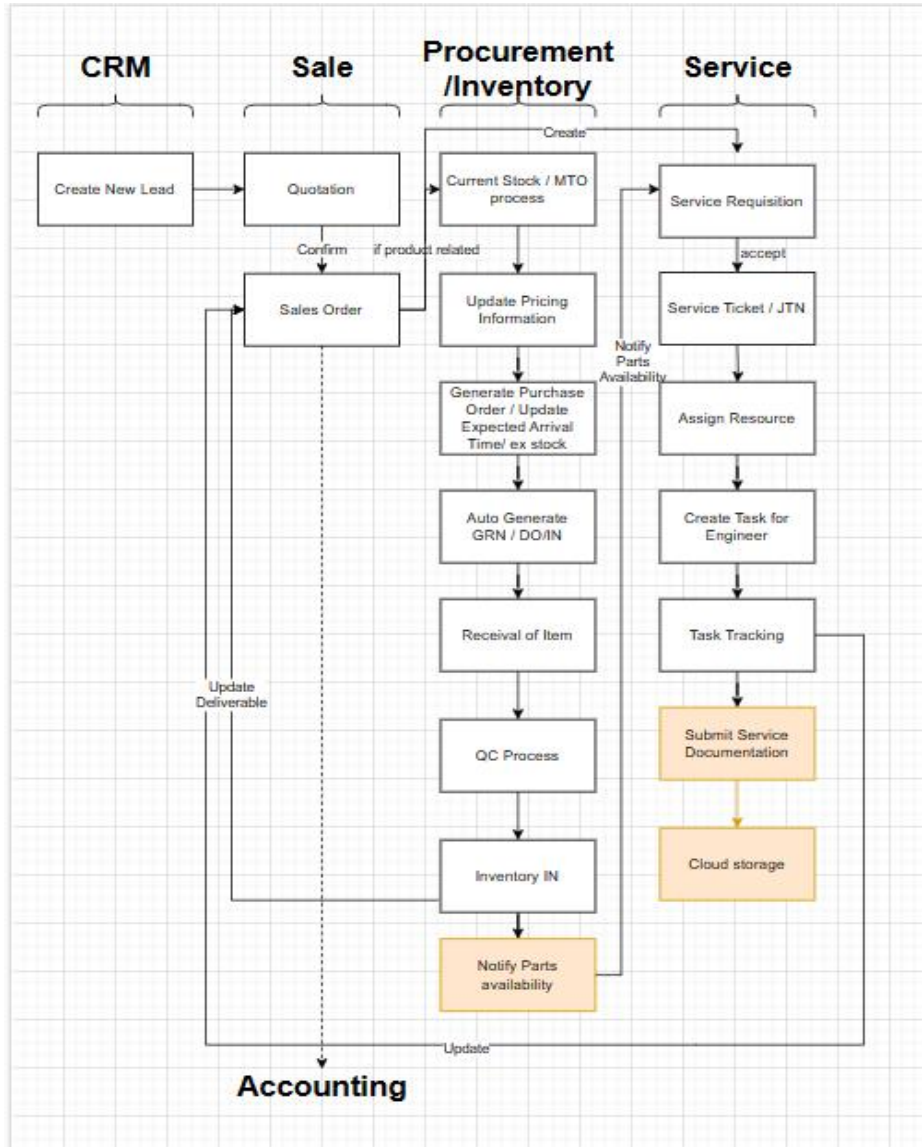
Expected Closing ?

★★★★

Tags ?

Lead Type: Adhoc Service flowchart

This is the flowchart for quotation(s) with Lead Type "Adhoc Service".



Lead Type: Trading

CRM Sales Reporting Configuration Inquiry Report



New Pipeline PARTNER A's opportunity

No Meeting Quotations 2 Orders RM 1,041.26 Similar Leads 3

2 / 5 < >

New Quotation

Won

Lost

New 5d

Qualified

Proposition

Lost Job

Won

PARTNER A's opportunity

Expected Revenue
RM1,250,000.00

Probability
at 50.00 %

Customer ? COMPANY ASSOCIATION SDN BHD A, PARTNER A
JALAN A, TAMAN B
KAMPUNG C
BANDAR D KUL 55100
Malaysia

Salesperson H Haziq

Expected Closing ? ★★ ★

Tags ?

Lead Type ? Trading

Email partnerA@gmail.com

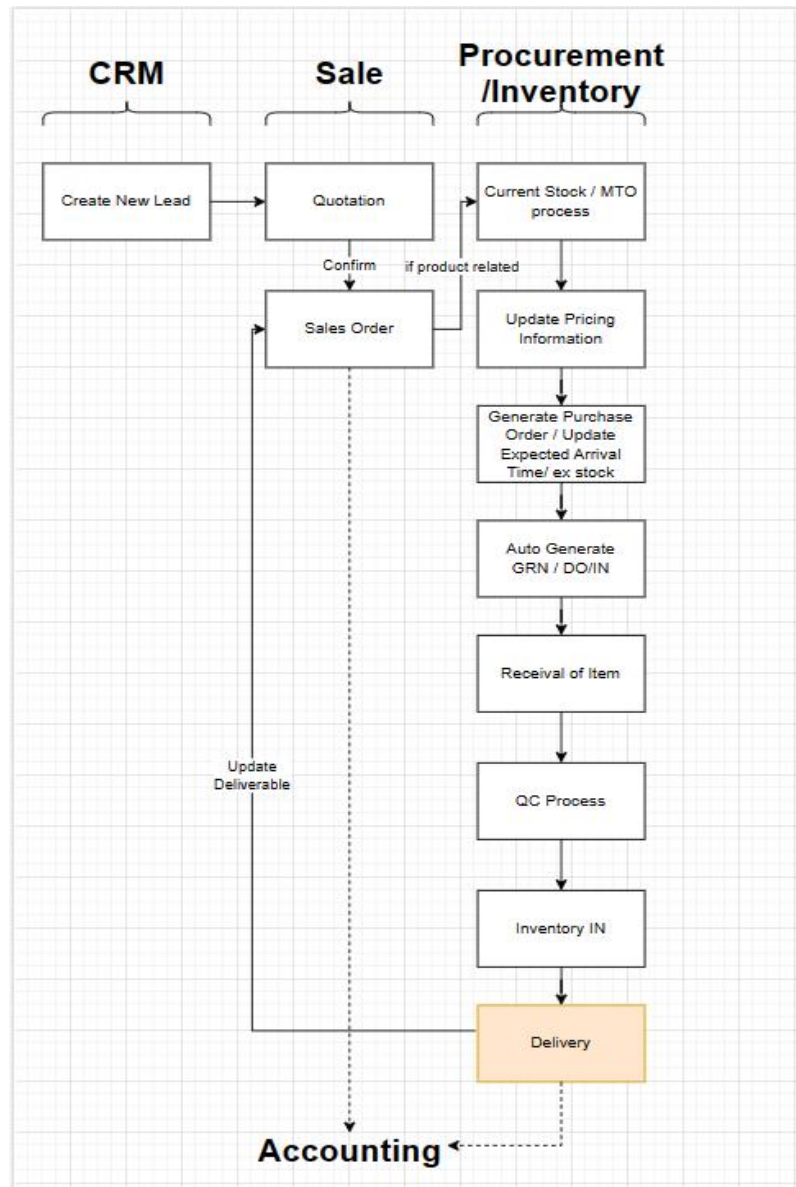
Phone

Internal Notes Extra Information Attachment Customer Inquiry Report

Add a description...

Lead Type: Trading Flowchart

This is the flowchart for quotation(s) with Lead Type "Trading".



Lead Type: Contract

CRM

Sales

Reporting

Configuration

Inquiry Report

New

Pipeline

PARTNER A's opportunity

No Meeting

Quotations
2

Orders
RM 1,041.26

Similar Leads
3

2 / 5

New Quotation

Won

Lost

New 5d

Qualified

Proposition

Lost Job

Won

PARTNER A's opportunity

Expected Revenue

RM1,250,000.00

Probability

at 50.00 %

Customer ?

COMPANY ASSOCIATION SDN BHD A, PARTNER A
JALAN A, TAMAN B
KAMPUNG C
BANDAR D KUL 55100
Malaysia

Lead Type ?

Contract

Contract Sum

0.00

Email

partnerA@gmail.com

Phone

Internal Notes

Extra Information

Attachment

Customer Inquiry Report

Add a description

Salesperson

H Haziq

Expected Closing ?

☆☆☆

Tags ?

Contract Date

Contract Types ?

- Must fill up the contract sum and contract date
- Choose the contract type: trading, service and project

Lead Type: Contract

CRM Sales Reporting Configuration Inquiry Report

10 6 H

Pipeline / PARTNER A's opportunity
QT-2025-00561

Item Request 0 Revisions 0

1 / 1 < >

Send by Email Send PRO-FORMA Invoice Convert Currency Confirm Cancel Draft Quotation Sales Order Revised

QT-2025-00561

Customer COMPANY ASSOCIATION SDN BHD A, PARTNER A
JALAN A, TAMAN B
KAMPUNG C
BANDAR D MY-14 55100
Malaysia

Job ?

Sub Job ?

Ref ?

Project Code ?

Doc No ?

CPO Number

Expiration 02/01/2025

Pricelist ? Default MYR pricelist (MYR)

Payment Terms

Business Group

Business Unit

Product Brand

Charge Code

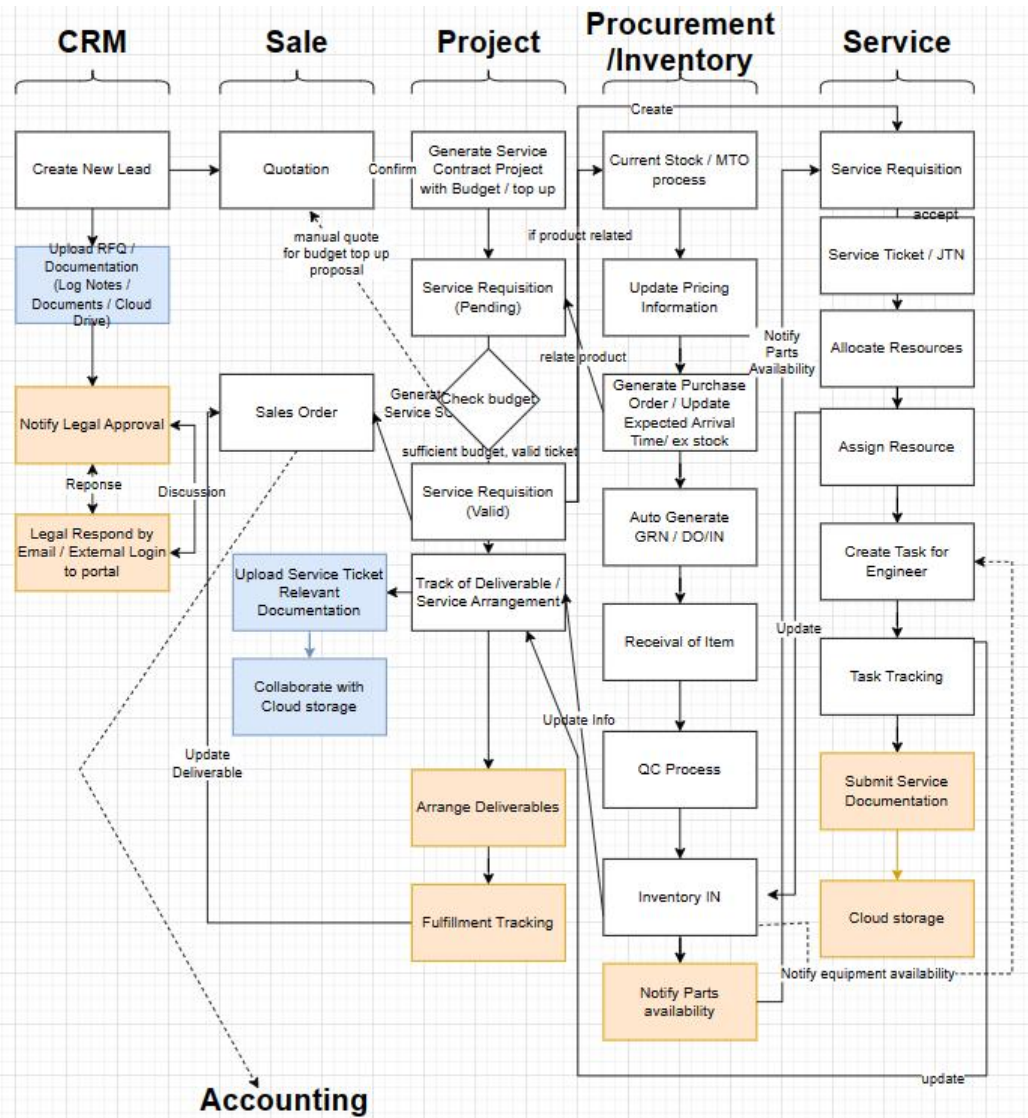
Cover Page

Lead Type ?

Contract Type ?

- Project
- Adhoc Service
- Trading
- Search More...

This is the flowchart for quotation(s) with Lead Type "Contract".



New Quotation CRM

- Click "New Quotation" to open a quotation

CRM

Sales

Reporting

Configuration

Inquiry Report

New

Pipeline

PARTNER A's opportunity

No Meeting

Quotations 2

Orders RM 1,041.26

Similar Leads 3

2 / 5

<

>

New Quotation

Won

Lost

New 5d

Qualified

Proposition

Lost Job

Won

PARTNER A's opportunity

Expected Revenue

RM1,250,000.00

Probability

at 50.00 %

Customer

COMPANY ASSOCIATION SDN BHD A, PARTNER A
JALAN A, TAMAN B
KAMPUNG C
BANDAR D KUL 55100
Malaysia

Salesperson

H Haziq

Lead Type

Project

Expected Closing

★★★★

Email

partnerA@gmail.com

Tags

Phone

Total Price

0.00

Internal Notes

Extra Information

Attachment

Customer Inquiry Report

Add a description

Quotation

- Fill in all the related field after the quotation is created.
- Upload a PDF document for the cover page.

CRM Sales Reporting Configuration Inquiry Report

... / PARTNER A's opportunity / Quotations

QT-2024-00547 ⚙

Item Request0

Revisions0

Draft BOM1

1 / 2 < >

Send by Email

Send PRO-FORMA Invoice

Autofill from Draft BoM

Create Task

Convert Currency

Confirm

Cancel

Draft ▾

QT-2024-00547

Customer	COMPANY ASSOCIATION SDN BHD A, PARTNER A JALAN A, TAMAN B KAMPUNG C BANDAR D KUL 55100 Malaysia	Expiration	01/22/2025
Job ?	aa	Quotation Date ?	12/23/2024 14:23:06
Sub Job ?	ss	Pricelist ?	Default MYR pricelist (MYR)
Ref ?	ras23	Payment Terms	
Project Code ?		Business Group	Project
Doc No ?		Business Unit	Filter
CPO Number		Product Brand	Ariel
Proposal Type ?		Charge Code	PJ-FR-30
Invoice Address	COMPANY ASSOCIATION SDN BHD A, INVOICE	Cover Page	<div>Upload your file</div>
Delivery Address	COMPANY ASSOCIATION SDN BHD A, DELIVERY	Lead Type ?	Project

Draft BOM List (Project type)

For the project lead type, there will be the draft bom in the Sales Order. Once draft the BOM, click on the Autofill from draft BOM button to pass back the product from your draft BOM to Sales Order

CRMSalesReportingConfigurationInquiry Report

... / PARTNER A's opportunity / Quotations

QT-2024-00546

Item Request0

Revisions0

Draft BOM0

1 / 2<>

Send by Email

Send PRO-FORMA Invoice

Autofill from Draft BoM

Create Task

Convert Currency

Confirm

Cancel

Draft

Quotation

Sales Order

Revised

QT-2024-00546

Customer

COMPANY ASSOCIATION SDN BHD A, PARTNER A
JALAN A, TAMAN B
KAMPUNG C
BANDAR D KUL 55100
Malaysia

Job?

Sub Job?

Ref?

Project Code?

Doc No?

CPO Number

Proposal Type?

Invoice Address

COMPANY ASSOCIATION SDN BHD A, INVOICE

Delivery Address

COMPANY ASSOCIATION SDN BHD A, DELIVERY

Expiration

01/22/2025

Quotation Date?

12/23/2024 12:08:49

Pricelist?

Default MYR pricelist (MYR)

Payment Terms

Business Group

Business Unit

Product Brand

Charge Code

Cover Page

Upload your file

Lead Type?

Project

Request Legal approval from Legal Team

- Tick "Legal" if you need legal team to view and approved legal.
- Only project can required legal.
- Before the legal team approve the legal, the legal status will display as "Pending".
- After legal team approve the legal, the legal status will display as "Approved"

Sales

Orders

To Invoice

Products

Reporting

Charge Code

Configuration

Quotations

QT-2024-00546

Item Request

0

Revisions

0

Draft BOM

1

Proposal Type ?

Invoice AddressCOMPANY ASSOCIATION SDN BHD A, INVOICE

Delivery AddressCOMPANY ASSOCIATION SDN BHD A, DELIVERY

Revision Count0

Latest Revision Count0

Original Order Reference

Revision Amount Difference0.00

Approved by:

Required Applicant? ☐

Legal? ?☒

LegalQT-2024-00546 || Pending

Legal Comment

Order Lines

Optional Products

Other Info

CPO

Requirement

Attachment

After been approved

Approved by:Haziq

Required Applicant?☒

Legal? ?☒

LegalSO-2024-00459 || Approved

Legal Comment

Send Required To Application Team in the SO

- Tick "Required Applicant" if you need application team to draft BOM.
- Only project can required applicant

CRM Sales Reporting Configuration Inquiry Report

Pipeline / PARTNER A's opportunity

QT-2024-00547

Item Request0

Revisions0

Draft BOM1

1 / 1

Lead Type ?Project

Proposal Type ?

Invoice AddressCOMPANY ASSOCIATION SDN BHD A, INVOICE

Delivery AddressCOMPANY ASSOCIATION SDN BHD A, DELIVERY

Revision Count0

Latest Revision Count0

Original Order Reference

Revision Amount Difference0.00

Required Applicant? ☒

Legal? ?☐

Legal

Legal Comment

Order Lines

Optional Products

Other Info

CPO

Requirement


Attachment

Customer Signature

Product	Description	Quantity	UoM	Unit Price	End User Details	Taxes	Discount	Tax excl.
<div>Add a product Add a section Add a note Catalog</div>								

Required Bank Guarantee and Insurance

- Must tick on the applicant
- Sales team can mark the Bank Guarantee and Insurance boxes, if required applicant team to attach files.


 Application


List


Product

Application Overview / QT-2024-00554

QT-2024-00554

 Item Request
0

 Revisions
0

 Draft BOM
1

1 / 1

<

>

Latest Revision Count0

Original Order Reference

Revision Amount Difference0.00

Required Applicant?☒

Legal?☐

Legal

Legal Comment

Order Lines

Optional Products

Other Info

CPO

Requirement

Attachment

BANK GUARANTEE

Require Bank Guarantee☒

Bank Guarantee

Bank Guarantee Expired Date

INSURANCE

Require Insurance☒

Insurance File

Insurance Expired Date

Send message

Log note

Activities

   1

Following

Draft BOM List (Project type)

- Click on “New” to generated a new BOM version.
- Select an existing BOM version to edit or add on difference component.

CRM Sales Reporting Configuration Inquiry Report

New

Quotations / QT-2024-00546

Draft BOM list

Search...

1-1 / 1

<

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<input type="checkbox"/> BOM ID	Status
<input type="checkbox"/> Version 1	Draft

Create new BOM

How to create a Major product and add sub component and sub-sub component product in BOM Version

Major product >Sub component>Sub-sub component

- Select currency.
- Major Product > Click “ADD A LINE” to generated a product.

CRM Sales Reporting Configuration Inquiry Report

New / QT-2024-00546 / Draft BOM list
Version 1

1 / 1

Confirm BOM Line Convert Currency Round Off

BOM ID Version 1 Status ? Draft

Currency MYR

Bom Information

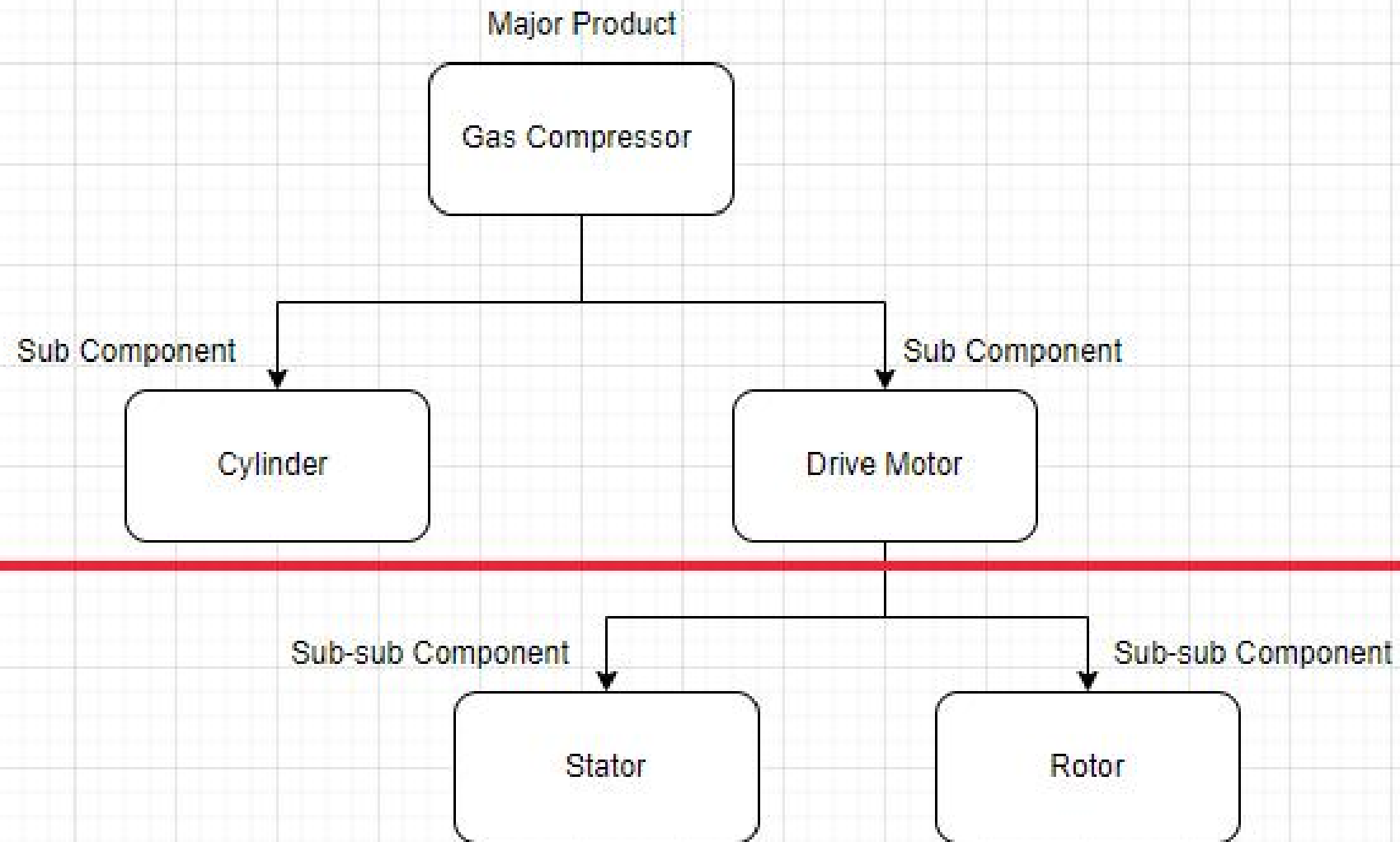
Prod...	Com...	Com...	Attach...	Rema...	Quantity	Unit Cost	Total Cost	MU (%)	Unit Price	Total Price	Expected...	Status

Add a line

Send message Log note Activities

Today

Draft BOM Flow



Create Major Product in BOM

- Shell's opportunity > Major Product (Gas Compressor)

Major Product

Component of Major Product

CRM Sales Reporting Configuration Inquiry Report

New / QT-2024-00546 / Draft BOM list

Version 1

1 / 1

Confirm BOM Line

Convert Currency

Round Off

BOM ID

Version 1

Status

Draft

Currency

MYR

Bom Information

Product	Compone...	Compone...	Attachme...	Remar...	Quantity	Unit Cost	Total Cost	MU (%)	Unit Price	Total Price	Expected ...	Status
[asdsa-0289...]	[asdsa-0289...]				1.00	4,500.00	4,500.00	62	7,290.00	7,290.00		Draft
							4,500.00		7,290.00			

Add a line

Send message

Log note

Activities

Following

- 1. To create component, Click on empty component line and type anything
- 2. An option to create will appear, click on it.
- 3. After creation, click on save button (top left update cloud icon)
- 4. The system will then automatically update the component name based on the product name.

CRM Sales Reporting Configuration Inquiry Report

New / QT-2024-00546 / Draft BOM list Version 1

1 / 1 < >

Confirm BOM Line Convert Currency Round Off

BOM ID Version 1

Currency MYR

Bom Information

Status ? Draft

Product	Compon...	Compon...	Attachme...	Remar...	Quantity	Unit Cost	Total Cost	MU (%)	Unit Price	Total Price	Expected...	Stat...
<input type="checkbox"/> [asdsa-02890 →	new	→	Upload yc		1.00	4,565.00	4,565.00	62	7,395.30	7,395.30		Draft
							4,565.00			7,395.30		

Add a line

Send message Log note Activities

Following


Step 3


Step 1


Step 2


Enter to Gas Compressor - Bom Component page


Click the arrow next to the component to enter to Bom Component of Gas Compressor page.

 CRM

 Sales

 Reporting

 Configuration

 Inquiry Report


New

...

QT-2024-00546

Draft BOM list

Version 1



4

1

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1 / 1

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Confirm BOM Line

Convert Currency

Round Off

BOM ID

Version 1


Status ?

Draft

Currency

MYR

Bom Information


Product	Component	Compon...	Attachme...	Remar...	Quantity	Unit Cost	Total Cost	MU (%)	Unit Price	ToI
<input type="checkbox"/> [asdsa-028...	[asdsa-028907] Gas Compressor - Bom Component	<div></div>			1.00	4,565.00	4,565.00	62	7,395.30	7,395
							4,565.00			7,395


Add a line


Send message

Log note

Activities







1

Following

Gas Compressor - Bom Component Page

After enter to Gas Component section. Click "ADD A LINE" to add product of Sub Component.

Gas Compressor
sub component

Drive Motor BOM
component

Quantity and Cost of Sub Component

CRM Sales Reporting Configuration Inquiry Report

New

/ Draft BOM list / Version 1

[asdsa-028907] Gas Compressor - Bom Component

Confirm BOM Line

Round Off

[asdsa-028907] Gas Compressor - Bom Component

	Product	Component	Component Type	Attachment	Remarks	Quantity	Unit Cost	Total Cost	Unit Price	Total Price	Expected Usin
<input type="checkbox"/>	[asdsa-028908] Cylinder	➔				1.00	4,500.00	4,500.00	1.00	1.00	
<input type="checkbox"/>	[asdsa-028909] Drive M...	[asdsa-028909] Drive Motor... ➔				1.00	65.00	65.00	0.00	0.00	

4,565.00

1.00

Add a line

Enter to Drive Motor – Bom Component page

If you wish to create a "Drive Motor - Bom Component", click the arrow next to the Component.

CRMSalesReportingConfigurationInquiry Report

New

...

Draft BOM list

Version 1

[asdsa-028907] Gas Compressor - Bom Component

1 / 1

Confirm BOM LineRound Off

[asdsa-028907] Gas Compressor - Bom Component

	Product	Component	Compone...	Attachme...	Remar...	Quantity	Unit Cost	Total Cost	Unit Price	Total Price
<input type="checkbox"/>	[asdsa-0289...	→				1.00	4,500.00	4,500.00	1.00	1.00
<input type="checkbox"/>	[asdsa-0289...	→	[asdsa-028909] Drive Motor - Bom Component	→		1.00	65.00	65.00	0.00	0.00

4,565.00

1.00

Add a line

Drive Motor Component Page

After enter to Drive Motor – Bom Component section. Click "ADD A LINE" to add a component of Drive Motor.

Sub-sub Component

Quantity and Cost of Sub-sub Component

CRM

Sales

Reporting

Configuration

Inquiry Report

New

...

Version 1

/

[asdsa-028907] Gas Compressor - Bom Component

[asdsa-028909] Drive Motor - Bom Component

⚙️

1 / 1

<

>

Confirm BOM Line

Round Off

[asdsa-028909] Drive Motor - Bom Component

Product	Component	Component Type	Attachment	Remarks	Quantity	Unit Cost	Total Cost	Unit Price	Total Price	Expected Using Date	Status
<input type="checkbox"/>	Stator	➔			5.00	0.00	0.00	5.00	25.00		Draft
<input type="checkbox"/>	Rotor	➔			5.00	0.00	0.00	5.00	25.00		Draft
					0.00		50.00				

Add a line

MU (Multiplier or Markup)

After fill up the BOM list, application team can also set up a multiplier of the total price at the major product section if needed.

CRMSalesReportingConfigurationInquiry Report

New

... / QT-2024-00546 / Draft BOM list

Version 1

1 / 1

Confirm BOM LineConvert CurrencyRound Off

BOM IDVersion 1

Status?Draft

CurrencyMYR

Bom Information

Product	Compon...	Compon...	Attachme...	Remar...	Quantity	Unit Cost	Total Cost	MU (%)	Unit Price	Total Price	Expected...	Stat...
<input type="checkbox"/> [asdsa-028...	→ [asdsa-028...	→			1.00	4,500.00	4,500.00	62	7,290.00	7,290.00		Draft
							4,500.00		7,290.00			

Add a line

Send messageLog noteActivities

Following

Convert Currency

Select the BOM line, then click the convert currency button.

CRMSalesReportingConfigurationInquiry Report

New

...

QT-2024-00546

/ Draft BOM list

Version 1

1 / 1<>

Confirm BOM Line

Convert Currency

Round Off

BOM IDVersion 1

Status?Draft

CurrencyMYR

Bom Information

Product	Compon...	Compon...	Attachme...	Remar...	Quantity	Unit Cost	Total Cost	MU (%)	Unit Price	Total Price	Expected...	Stat...	
<input type="checkbox"/>	[asdsa-028... →	[asdsa-028... →			1.00	4,500.00	4,500.00	62	7,290.00	7,290.00		Draft	
							4,500.00		7,290.00				

Add a line

Send message

Log note

Activities

Following

Convert Currency

Select the exchange currency and user able to reset the rate of the currency. Once convert, all the cost and price will be updated.

CRM

Sales

Reporting

Configuration

Inquiry Report

New

...

QT-2024-00546

Draft BOM list

1 / 1

<

>

Version 1

⚙

Confirm BOM Line

Convert Currency

Round Off

BOM ID

Version 1

Status ?

Draft

Currency

MYR

Bom Information

Product

☐

[asdsa-028...

→

4,500.00

7,290.00

Add a line

Send message

Log note

Activities

🔍

🔗

👤¹

Following

Odoo

✕

Currency

USD

Rate

0.22

Convert Rate

Cancel

Round off the unit price

Select the BOM line, then click the Round Off button.

CRM

Sales

Reporting

Configuration

Inquiry Report

New

...

QT-2024-00546

/

Draft BOM list

Version 1

1 / 1

<

>

Confirm BOM Line

Convert Currency

Round Off

BOM ID

Version 1

Status ?

Draft

Currency

MYR

Bom Information

Product	Compon...	Compon...	Attachme...	Remar...	Quantity	Unit Cost	Total Cost	MU (%)	Unit Price	Total Price	Expected...	Stat...
<input type="checkbox"/>	[asdsa-028...	→	[asdsa-028...	→	1.00	4,500.00	4,500.00	62	7,290.00	7,290.00		Draft
							4,500.00		7,290.00			

Add a line

Send message

Log note

Activities

Following

Round off the unit price

Enter the round off value. Then click on the Round Off button, then the unit price will positive round off to the nearest value that user set earlier.

The screenshot displays a CRM application interface. At the top, there is a navigation bar with tabs for CRM, Sales, Reporting, Configuration, and Inquiry Report. Below this, a breadcrumb trail shows 'New' / 'QT-2024-00546' / 'Draft BOM list'. The main area contains a 'Draft BOM list' for 'Version 1'. A modal dialog titled 'Round Off' is open in the center. Inside the dialog, the 'Round Off Value' is set to '100'. A red rectangle highlights this input field. Below the input field, a message states '*Round off value should be positive value.'. At the bottom of the dialog, there are two buttons: 'Round Off' and 'Cancel'. The 'Round Off' button is also highlighted with a red rectangle. The background interface shows a table with columns for 'Product', 'Unit Price', and 'Total Price'. The 'Unit Price' column shows '9,000.00' and the 'Total Price' column shows '14,600.00'. The status of the BOM is 'Draft'.

CRM Sales Reporting Configuration Inquiry Report

New / QT-2024-00546 / Draft BOM list

Version 1

Confirm BOM Line Convert Currency Round Off

BOM ID Version 1 Status ? Draft

Currency MYR

Bom Information

Product

[asdsa-028...]

9,000.00 14,600.00

Add a line

Send message Log note Activities

Following

Autofill from Draft BOM Button

Once click the button, the major product in Draft BOM will be copy to the Sales Order

CRM Sales Reporting Configuration Inquiry Report

...

PARTNER A's opportunity

Quotations

QT-2024-00547

⚙️

Item Request 0

Revisions 0

Draft BOM 1

1 / 2 < >

Revision Amount 0.00

Legal Comment

Difference

Order Lines	Optional Products	Other Info	CPO	Requirement	Attachment	Customer Signature		
Product	Description	Quantity	UoM	Unit Price	End User Details	Taxes	Discount	Tax excl.
⋮ [asdsa-028907] Gas Compressor	Gas Compressor	1.00 📈	Units	1.00		10% (Goods)	0.00	RM 1.00 🗑️

[Add a product](#)
[Add a section](#)
[Add a note](#)
[Catalog](#)

Terms and conditions...

Untaxed Amount: RM 1.00

SST: RM 0.10

Total: RM 1.10

Send message

Log note

Activities

🔍 📎 👤¹

Following

Today

Waiting Other Department Status Approval

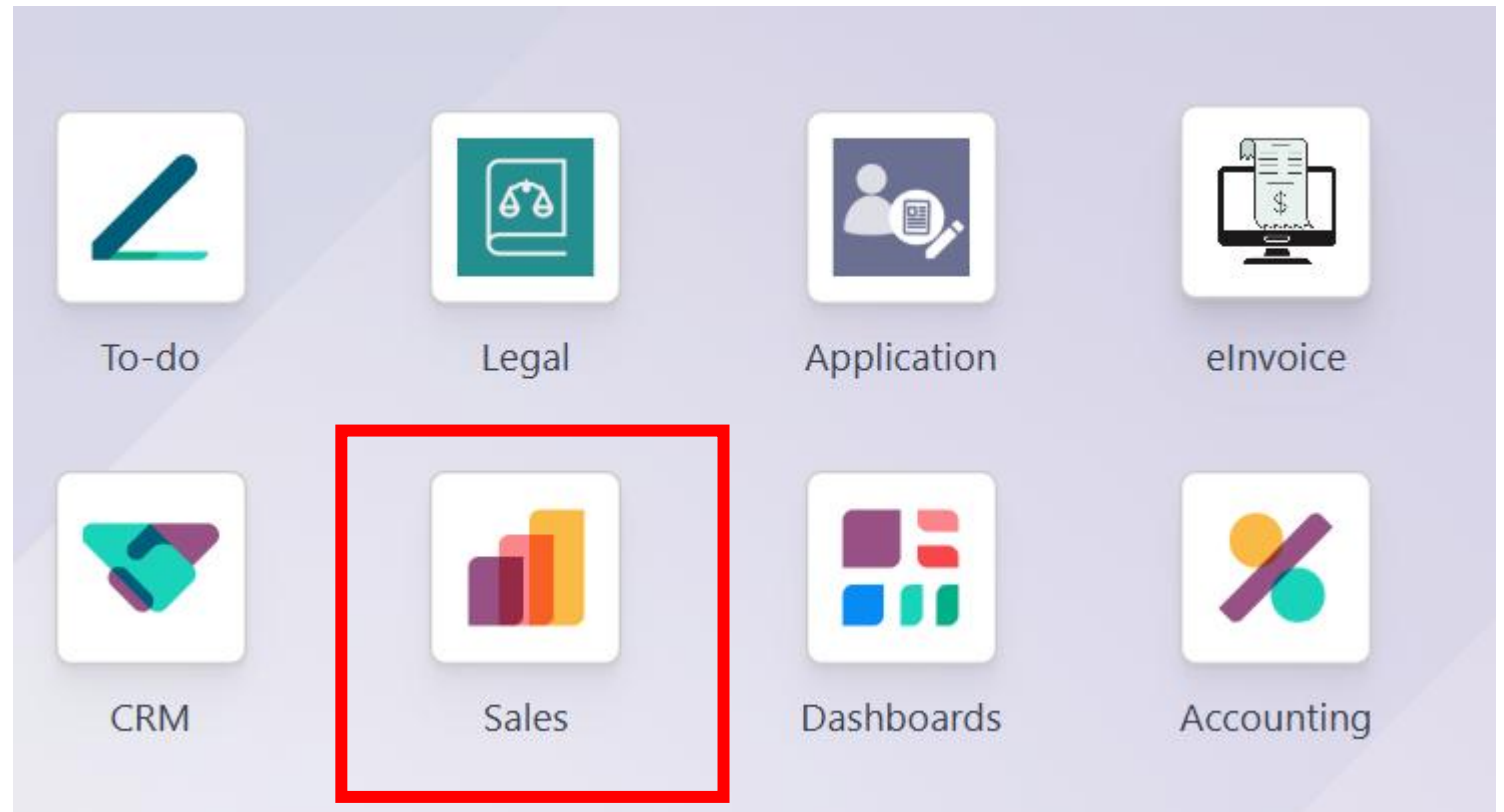
Legal Advice Team Process

- Need approval Legal Documentation
- Status pending is waiting Legal advice access to upload documentation and approval
- once's legal advice approval ,The status will show on approval

Application Team Process

- Created Draft BOM Version

SALES MODULE



Quotation Overview

- Quotation Overview show all of the sales quotation you that you have created and the status
- Click the sales order (SOxxxx) to view the sales quotation.

SalesOrdersTo InvoiceProductsReportingCharge CodeConfiguration

Quotations ⚙

🔍

My Quotations

×

Search...

▼

1-19 / 19<>☰☒📅📊📈🕒

<input type="checkbox"/>	Number	Quotation / Order...	Customer	Salespers...	Activiti...	Job	Sub J...	Customer PO	Charge Co...	Delivery	Total	status	⌵
<input type="checkbox"/>	SO-2024-00460	12/24/2024 12:31:31	COMPANY ASSOCIA...	H Haziq	🕒	sdaf...	ergfgtfb	vc bvmvihv	SP-PC-30	<div><div></div></div> 50 %	RM 1,889.58	Sales Ord...	
<input type="checkbox"/>	SO-2024-00459	12/24/2024 10:54:37	COMPANY ASSOCIA...	H Haziq	🕒	ads	fgdg	sdafef	PJ-PC-40	<div><div></div></div> 100 %	¥ 59,950	Sales Ord...	
<input type="checkbox"/>	SO-2024-00458	12/24/2024 09:14:55	COMPANY ASSOCIA...	H Haziq	🕒	AAA	SSS	23154	SP-AC-30	<div><div></div></div> 50 %	RM 0.00	Sales Ord...	
<input type="checkbox"/>	SO-2024-00457	12/23/2024 17:17:33	COMPANY ASSOCIA...	H Haziq	🕒	DVG	STR456	2343DD3453WE	SP-PC-20	<div><div></div></div> 100 %	RM 2,469.46	Sales Ord...	
<input type="checkbox"/>	QT-2024-00549	12/23/2024 16:37:18	COMPANY ASSOCIA...	H Haziq	🕒	AAAA	AAABB		MP-PC-60	<div><div></div></div> 0 %	RM 2.00	Draft	
<input type="checkbox"/>	QT-2024-00547	12/23/2024 14:23:06	COMPANY ASSOCIA...	H Haziq	🕒	aa	ss		PJ-FR-30	<div><div></div></div> 0 %	RM 1.10	Draft	
<input type="checkbox"/>	QT-2024-00546	12/23/2024 12:08:49	COMPANY ASSOCIA...	H Haziq	🕒					<div><div></div></div> 0 %	RM 0.00	Draft	
<input type="checkbox"/>	SO-2024-00455	12/23/2024 12:00:11	COMPANY ASSOCIA...	H Haziq	🕒	nh	jjh	1345	MP-AC-50	<div><div></div></div> 0 %	RM 2.00	Sales Ord...	
<input type="checkbox"/>	QT-2024-00543	12/20/2024 08:14:55	COMPANY ASSOCIA...	H Haziq	🕒	SS10	SJ23		MP-AC-10	<div><div></div></div> 0 %	RM 915.26	Draft	
<input type="checkbox"/>	QT-2024-00542	12/19/2024 16:18:47	COMPANY ASSOCIA...	H Haziq	🕒					<div><div></div></div> 0 %	RM 592.00	Cancelled	
<input type="checkbox"/>	QT-2024-00540	12/19/2024 12:45:36	COMPANY ASSOCIA...	H Haziq	🕒			12345	GPJ-AD-40	<div><div></div></div> 0 %	RM 132.00	Draft	
<input type="checkbox"/>	SO-2024-00453	12/18/2024 16:56:03	COMPANY ASSOCIA...	H Haziq	🕒	aa	aaa	asdff	PJ-PC-10	<div><div></div></div> 0 %	RM 595.39	Sales Ord...	
<input type="checkbox"/>	SO-2024-00446	12/18/2024 10:56:57	company h	H Haziq	🕒	AA	SS	123456	SP-AC-10	<div><div></div></div> 20 %	RM 1 275.65	Sales Ord	

Quotation Status

- When the quotation has been saved, the quotation overview list will show the status as "Draft". Click into to view the quotation view.
- When the quotation has been confirm, the quotation overview list will show the status as "Sales Order".

<input type="checkbox"/>	SO-2024-00458	12/24/2024 09:14:55	COMPANY ASSOCIA...	H Haziq	🕒	AAA SSS	23154	SP-AC-30	<div><div></div></div>	50 %	RM 0.00	Sales Ord...
<input type="checkbox"/>	SO-2024-00457	12/23/2024 17:17:33	COMPANY ASSOCIA...	H Haziq	🕒	DVG STR456	2343DD 3453WE	SP-PC-20	<div><div></div></div>	100 %	RM 2,469.46	Sales Ord...
<input type="checkbox"/>	QT-2024-00549	12/23/2024 16:37:18	COMPANY ASSOCIA...	H Haziq	🕒	AAAA AAABB		MP-PC-60	<div><div></div></div>	0 %	RM 2.00	Draft
<input type="checkbox"/>	QT-2024-00547	12/23/2024 14:23:06	COMPANY ASSOCIA...	H Haziq	🕒	aa ss		PJ-FR-30	<div><div></div></div>	0 %	RM 1.10	Draft
<input type="checkbox"/>	QT-2024-00546	12/23/2024 12:08:49	COMPANY ASSOCIA...	H Haziq	🕒				<div><div></div></div>	0 %	RM 0.00	Draft
<input type="checkbox"/>	SO-2024-00455	12/23/2024 12:00:11	COMPANY ASSOCIA...	H Haziq	🕒	nh jjh	1345	MP-AC-50	<div><div></div></div>	0 %	RM 2.00	Sales Ord...
<input type="checkbox"/>	QT-2024-00543	12/20/2024 08:14:55	COMPANY ASSOCIA...	H Haziq	🕒	SS10 SJ23		MP-AC-10	<div><div></div></div>	0 %	RM 915.26	Draft
<input type="checkbox"/>	QT-2024-00542	12/19/2024 16:18:47	COMPANY ASSOCIA...	H Haziq	🕒				<div><div></div></div>	0 %	RM 592.00	Cancelled

Confirm Sales Quotation

- In this quotation view section, you are still able to edit the information.
- When you make sure all the information are correct. Click "CONFIRM".
- Before confirm quotation, make sure CPO are set up.
- Once's Sales Quotation is confirmed. The Sales quotation will be turning to Sales Order.

Sales Orders To Invoice Products Reporting Charge Code Configuration

Quotations
QT-2024-00549

Tasks 1 Item Request 0 Revisions 0

Send by Email Send PRO-FORMA Invoice Create Task Convert Currency **Confirm** Cancel Draft Quotation Sales Order Revised

QT-2024-00549

Customer	COMPANY ASSOCIATION SDN BHD A, PARTNER A JALAN A, TAMAN B KAMPUNG C BANDAR D MY-14 55100 Malaysia	Expiration	01/22/2025
Job	AAAA	Pricelist	Default MYR pricelist (MYR)
Sub Job	AAABB	Payment Terms	
Ref	SDEF	Business Group	Man Power
Project Code		Business Unit	Portable Air Compressor
Doc No		Product Brand	Blutek
CPO Number		Charge Code	MP-PC-60
Proposal Type		Cover Page	Upload your file
Invoice Address	COMPANY ASSOCIATION SDN BHD A, INVOICE	Lead Type	Adhoc Service
Delivery Address	COMPANY ASSOCIATION SDN BHD A, DELIVERY		

Revision Count 0 Approved by:

Latest Revision Count 0

Original Order Reference

Revision Amount 0.00

Difference

Order Lines Optional Products Other Info **CPO** Requirement Attachment Tasks Info

Product	Description	Analytic Distribution	Quantity	UoM	Unit Price	End User Details	Taxes	Discount	Tax excl.
---------	-------------	-----------------------	----------	-----	------------	------------------	-------	----------	-----------

CPO

- In CPO section, click "Add a line" to add a CPO number.
- Fill in the CPO number.
- File with prices and without prices are necessary to upload.
- After complete the step above, Click "ACKNOWLEDGED" to acknowledge the CPO.

Order Lines	Optional Products	Other Info	CPO	Requirement	Attachment
CPO Number	Comment			Status	
Add a line					

Create Customer PO

Acknowledged

Request To Revise

NEW

ACKNOWLEDGED

REQUEST FOR REVISE

CANCELLED

1345RRT

File

Upload your file

File with Prices

Upload your file

Acknowledged By

Comment

Save & Close

Save & New

Discard

- Before Acknowledge, the status was new. After Acknowledge, the status will show "ACKNOWLEDGED".
- After Acknowledged the CPO, click "SAVE & CLOSE" to save the CPO. Then the CPO status will show "ACKNOWLEDGED".

Create Customer PO

Acknowledged

Request To Revise

NEW

ACKNOWLEDGED

REQUEST FOR REVISE

CANCELLED

1345RRT

File

OnAir Berhad.pdf

File with Prices

OnAir Berhad.pdf

Acknowledged By

Comment

Save & Close

Save & New

Discard

Order Lines	Other Info	CPO	Requirement	Attachment
CPO Number		Comment		Status
2343DD		Revise Reason: Change item		CANCELLED
3453WE				ACKNOWLEDGED

Open: Customer PO

Request To Revise

NEW

ACKNOWLEDGED

REQUEST FOR REVISE

CANCELLED

1345RRT

File

OnAir Berhad.pdf

File with Prices

OnAir Berhad.pdf

Acknowledged By

Haziq

Comment

Close

Send / Print Proforma Invoice

SalesOrdersTo InvoiceProductsReportingCharge CodeConfiguration

QuotationsSO-2024-00458

Delivery2Item Request2Revisions0

Create InvoiceCreate PaymentRevisionSend PRO-FORMA InvoiceSend by EmailCancel

SO-2024-00458

CustomerCOMPANY ASSOCIATION SDN BHD A, PARTNER AJALAN A, TAMAN BKAMPUNG CBANDAR D MY-14 55100Malaysia

Job ?AAA

Sub Job ?SSS

Ref ?HHH

Project Code ?

Doc No ?

CPO Number23154

Proposal Type ?

Invoice AddressCOMPANY ASSOCIATION SDN BHD A, INVOICE

Delivery AddressCOMPANY ASSOCIATION SDN BHD A, DELIVERY

Order Date ?12/24,

Pricelist ?Defau

Payment Terms

Business GroupSpare parts

Business UnitAir Compressor

Product BrandAriel

Charge CodeSP-AC-30

Cover PageUpload your file

Lead Type ?Trading

SalesOrdersTo InvoiceProductsReportingCharge Code

QuotationsSO-2024-00458

Create Invoice

PrintDeleteAccrued Revenue EntryGenerate a Payment LinkCreate TaskMark Quotation as SentShare

Sale OrderTimesheetsTechnical ProposalCommercial ProposalBudgetary ProposalPRO-FORMA Invoice

Create Payment

- In this section you will be able to view the sales order and create payment.
- Click “Create Payment” to create invoice.

Sales

Orders

To Invoice

Products

Reporting

Charge Code

Configuration

Quotations

SO-2024-00458

Delivery

2

Item Request

2

Revisions

0

3 / 19

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H

Create Invoice

Create Payment

Revision

Send PRO-FORMA Invoice

Send by Email

Cancel

Sales Order

SO-2024-00458

Customer

COMPANY ASSOCIATION SDN BHD A, PARTNER A

JALAN A, TAMAN B

KAMPUNG C

BANDAR D MY-14 55100

Malaysia

Job

AAA

Sub Job

SSS

Ref

HHH

Project Code

Doc No

CPO Number

23154

Proposal Type

Invoice Address

COMPANY ASSOCIATION SDN BHD A, INVOICE

Delivery Address

COMPANY ASSOCIATION SDN BHD A, DELIVERY

Order Date

12/24/2024 09:14:55

Pricelist

Default MYR pricelist (MYR)

Payment Terms

Business Group

Spare Part

Business Unit

Air Compressor

Product Brand

Ariel

Charge Code

SP-AC-30

Cover Page

Upload your file

Lead Type

Trading

Create Invoice

- In this section you will be able to view the sales order and create invoice.
- Click “Create Invoice” to create invoice.

SalesOrdersTo InvoiceProductsReportingCharge CodeConfiguration

QuotationsSO-2024-00458

Delivery2Item Request2Revisions0

3 / 19

H

Create InvoiceCreate PaymentRevisionSend PRO-FORMA InvoiceSend by EmailCancel

Sales Order

SO-2024-00458

CustomerCOMPANY ASSOCIATION SDN BHD A, PARTNER AJALAN A, TAMAN BKAMPUNG CBANDAR D MY-14 55100Malaysia

Job ?AAA

Sub Job ?SSS

Ref ?HHH

Project Code ?

Doc No ?

CPO Number23154

Proposal Type ?

Invoice AddressCOMPANY ASSOCIATION SDN BHD A, INVOICE

Delivery AddressCOMPANY ASSOCIATION SDN BHD A, DELIVERY

Order Date ?12/24/2024 09:14:55

Pricelist ?Default MYR pricelist (MYR)

Payment Terms

Business GroupSpare Part

Business UnitAir Compressor

Product BrandAriel

Charge CodeSP-AC-30

Cover PageUpload your file

Lead Type ?Trading

- Once's Sales Quotation is confirmed. The Sales quotation will be turning to Sales Order.

Sales

Orders

To Invoice

Products

Reporting

Charge Code

Configuration

Quotations

SO-2024-00458

Delivery

2

Item Request

2

Revisions

0

3 / 19

<

>

Create Invoice

Create Payment

Revision

Send PRO-FORMA Invoice

Send by Email

Cancel

Sales Order

SO-2024-00458

Customer

COMPANY ASSOCIATION SDN BHD A, PARTNER A

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Spare Part

Business Unit

Air Compressor

Product Brand

Ariel

Charge Code

SP-AC-30

Cover Page

Upload your file

Lead Type

Trading

Draft

Quotation

✓ Sales Order

Revised

Tracking status on time delivery

- User are allow to track the status on time delivery in the main quotation page.

SalesOrdersTo InvoiceProductsReportingCharge CodeConfiguration

Quotations⚙️

Q My Quotations X Search...

1-19 / 19<>⌵⌶📅📊📈🕒

<input type="checkbox"/>	Number	Quotation / Order...	Customer	Salespers...	Activiti...	Job	Sub J...	Customer PO	Charge Co...	Delivery	Total	status	⚙️
<input type="checkbox"/>	SO-2024-00460	12/24/2024 12:31:31	COMPANY ASSOCIA...	H Haziq	🕒	sdaf...	ergfgtfb	vc bvmvihv	SP-PC-30	<div><div></div></div> 50 %	RM 1,889.58	Sales Ord...	
<input type="checkbox"/>	SO-2024-00459	12/24/2024 10:54:37	COMPANY ASSOCIA...	H Haziq	🕒	ads	fgdg	sdafef	PJ-PC-40	<div><div></div></div> 100 %	¥ 59,950	Sales Ord...	
<input type="checkbox"/>	SO-2024-00458	12/24/2024 09:14:55	COMPANY ASSOCIA...	H Haziq	🕒	AAA	SSS	23154	SP-AC-30	<div><div></div></div> 50 %	RM 0.00	Sales Ord...	
<input type="checkbox"/>	SO-2024-00457	12/23/2024 17:17:33	COMPANY ASSOCIA...	H Haziq	🕒	DVG	STR456	2343DD 3453WE	SP-PC-20	<div><div></div></div> 100 %	RM 2,469.46	Sales Ord...	

Add a Product

Select Click on “Add a Product” on sales Quotation order line to choose existing product or generated a New Product or use “Catalog” to select the product

SalesOrdersTo InvoiceProductsReportingCharge CodeConfiguration

QuotationsSO-2024-00460

Delivery2Item Request2Revisions0

1 / 19<>

H

Revision Amount0.00Difference

Order LinesOther InfoCPORequirementAttachment

Product	Description	Analytic Distrib...	Quantity	Delivered	Invoiced	UoM	Unit Price	End User Details	Taxes	Discount	Tax excl.
[10-10-023239] FLTR,	P/N: 88292019-845 FLTR, SUMP BREATHER P837762X	Type / Contract Business Group - ... Business Unit - P... Product Brand - ...	3.00	1.00	0.00	EA	511.23			0.00	RM 1,533.69
[10-10-023245] ELEM	P/N: 88290003-111 ELEM, AIR FLTR LS20S-200 CHNSZ	Type / Contract Business Group - ... Business Unit - P... Product Brand - ...	3.00	2.00	0.00	EA	118.63			0.00	RM 355.89

Add a product

Add a section

Add a note

Catalog

Terms and conditions...

Total: RM 1,889.58

Product General Information

- In sales order line can direct click on product name to access the product form view

Click on the product name to access

Sales Orders To Invoice Products Reporting Charge Code Configuration

Quotations SO-2024-00460

Delivery 2 Item Request 2 Revisions 0

1 / 19

Revision Amount 0.00
Difference

Order Lines Other Info CPO Requirement Attachment

Product	Description	Analytic Distrib...	Quantity	Delivered	Invoiced	UoM	Unit Price	End User Details	Taxes	Discount	Tax excl.
[10-10-023239] FLTR	P/N: 88292019-845 FLTR, SUMP BREATHER P837762X	Type / Contract Business Group - ... Business Unit - P... Product Brand - ...	3.00	1.00	0.00	EA	511.23			0.00	RM 1,533.69
[10-10-023245] ELEM	P/N: 88290003-111 ELEM, AIR FLTR LS20S-200 CHNSZ	Type / Contract Business Group - ... Business Unit - P... Product Brand - ...	3.00	2.00	0.00	EA	118.63			0.00	RM 355.89

Add a product

Add a section

Add a note

Catalog

Terms and conditions... Total: **RM 1,889.58**

Click to edit Product information

Product Name

☆ FLTR, SUMP BREATHER P837762X



☒ Can be Sold ☒ Can be Purchased ☐ Can be Expensed ?

- General Information
- Sales
- Purchase
- Inventory
- Accounting

Product Type ? Storable Product

Invoicing Policy ? Ordered quantities

SQL Product Code 10000013

Part Number ? 88292019-845

User Manual [Upload your file](#)

Code 10-10-023239

Storable products are physical items for which you manage the inventory level.

You can invoice them before they are delivered.

Unit of Measure ? EA

Purchase UoM ? EA

LHDN UoM

Sales Price ? RM511.23

Customer Taxes ?

Cost ? RM0.00 per EA

Internal Reference 10-10-023239

Barcode ?

Product Category Principle / Sullair / Std. Item

Product Template Tags

Additional Product Tags

[→ Configure tags](#)

Activities @ chatter space

- You can schedule **activities** (ex. **Call**, **Meeting**, etc.) per sales order by clicking on the **activities** button on a sales order. Doing so opens a list with already scheduled activities and allows planning **new** activities by clicking **+ Schedule an activity**. On the pop-up window, select the **Activity Type**, enter a **Summary** for that activity, a **Due Date**, and assign it to an employee. According to the **Activity Type**, you may have **additional options** available.

The screenshot shows the top navigation bar with tabs: Sales, Orders, To Invoice, Products, Reporting, Charge Code, and Configuration. Below this, the breadcrumb path is 'Quotations / SO-2024-00459'. A secondary bar shows activity counts: Projects 1, Tasks 1, Delivery 1, and Item Request 2, with a 'More' dropdown. The main content area has three buttons: 'Send message', 'Log note', and 'Activities' (highlighted with a red box). Below the buttons, a chat message from 'Haziq' is visible, stating 'The plan "Normal B" has been started'.

The 'Schedule Activity' pop-up window is displayed over the chat interface. It contains the following fields and options:

- Plan:** A dropdown menu currently set to 'Normal B'.
- Plan Date:** A field for selecting the date.
- Assigned To:** A field with a user icon and the name 'Haziq'.
- Plan summary:** A list of activity types: Email, Call, and To-Do.
- Buttons:** 'Schedule' and 'Cancel' buttons at the bottom.

The background interface is dimmed, showing the same navigation and chat elements as the first screenshot.

Activities @ chatter space

- You can schedule **activities** (ex. **Call**, **Meeting**, etc.) per sales order by clicking on the **activities** button on a sales order. Doing so opens a list with already scheduled activities and allows planning **new** activities by clicking **+ Schedule an activity**. On the pop-up window, select the **Activity Type**, enter a **Summary** for that activity, a **Due Date**, and assign it to an employee. According to the **Activity Type**, you may have **additional options** available.

SalesOrdersTo InvoiceProductsReportingCharge CodeConfiguration

Quotations / SO-2024-00459
SO-2024-00459

Projects1

Tasks1

Delivery1

Item Request2

More

1 / 1

Send messageLog noteActivities

Following

▼ Planned Activities

H

Today: Email for Haziq

✓ Mark Done✎ Edit✕ Cancel

A

Due in 2 days: Call for Abdul Aziz Bin Misro

✓ Mark Done✎ Edit✕ Cancel

H

Due in 5 days: To-Do for Haziq

✓ Mark Done✎ Edit✕ Cancel

Activities

- You can create more activity type based on your workflow of the business

CRM

Sales

Reporting

Configuration

Inquiry Report

New

Activity Types

Settings

Sales Teams

Activity Types

Activity Plans

Pipeline

Tags

Lost Reasons

Lead Generation

Lead Mining Requests

Search...

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<

>

	Name	It Summary	Planned in	Type	
<input type="checkbox"/>	Email			0 days after previous activity deadline	
<input type="checkbox"/>	Call			2 days after previous activity deadline	
<input type="checkbox"/>	Meeting			0 days after previous activity deadline	
<input type="checkbox"/>	Order Upsell			0 days after previous activity deadline	
<input type="checkbox"/>	To-Do			5 days after previous activity deadline	
<input type="checkbox"/>	Reminder			0 days after previous activity deadline	
<input type="checkbox"/>	Upload Document			5 days after previous activity deadline	
<input type="checkbox"/>	Request Signature			2 days after previous activity deadline	

Activities

- Each activity able to preset the action to be take, the default user that suppose to done the action.
- Chaining type: Whether want to **suggest or trigger** other activity once this activity is done


 CRM

Sales




Reporting



Configuration


Inquiry Report


 New



Activity Types

Meeting   

  9

 3

 H

3 / 8  

Name

Meeting

ACTIVITY SETTINGS

Action ?

Meeting

Default User

Noor Athirah BT Mohamad Salleh  →

Default Summary

e.g. "Discuss proposal"

Keep Done ?

☐

Default Note

e.g. "Go over the offer and discuss details"

NEXT ACTIVITY

Chaining Type

Suggest Next Activity

Suggest ?

Schedule ?

5

days

after previous activity deadline

Activities Plan

- User able to preset the activity plan and assigned the default user to do the task if not it will be assigned to the salesperson of the SO

Plan Name

Normal B

Activities To Generate

Activity Type	Summary	Assignment	Assigned to	Note	
<div><div></div><div></div><div></div></div> Email		Default user	Haziq		<div></div>
<div><div></div><div></div><div></div></div> Call		Default user	Abdul Aziz Bin Misro		<div></div>
<div><div></div><div></div><div></div></div> To-Do		Ask at launch			<div></div>
Add a line					

- User Access level Module Permission- (Sales)

Access Rights

Preferences

Account Security

SALES

Sales ? Administrator

Sign ?
User: Own Documents Only
User: All Documents
Administrator

ACCOUNTING

Accounting ? Accountant

Bank

MANUFACTURING

Maintenance ? Equipment Manager

Quality ? User

SERVICES

Field Service Administrator

Project ? Administrator

Timesheets ? Administrator

INVENTORY

Inventory ? Administrator

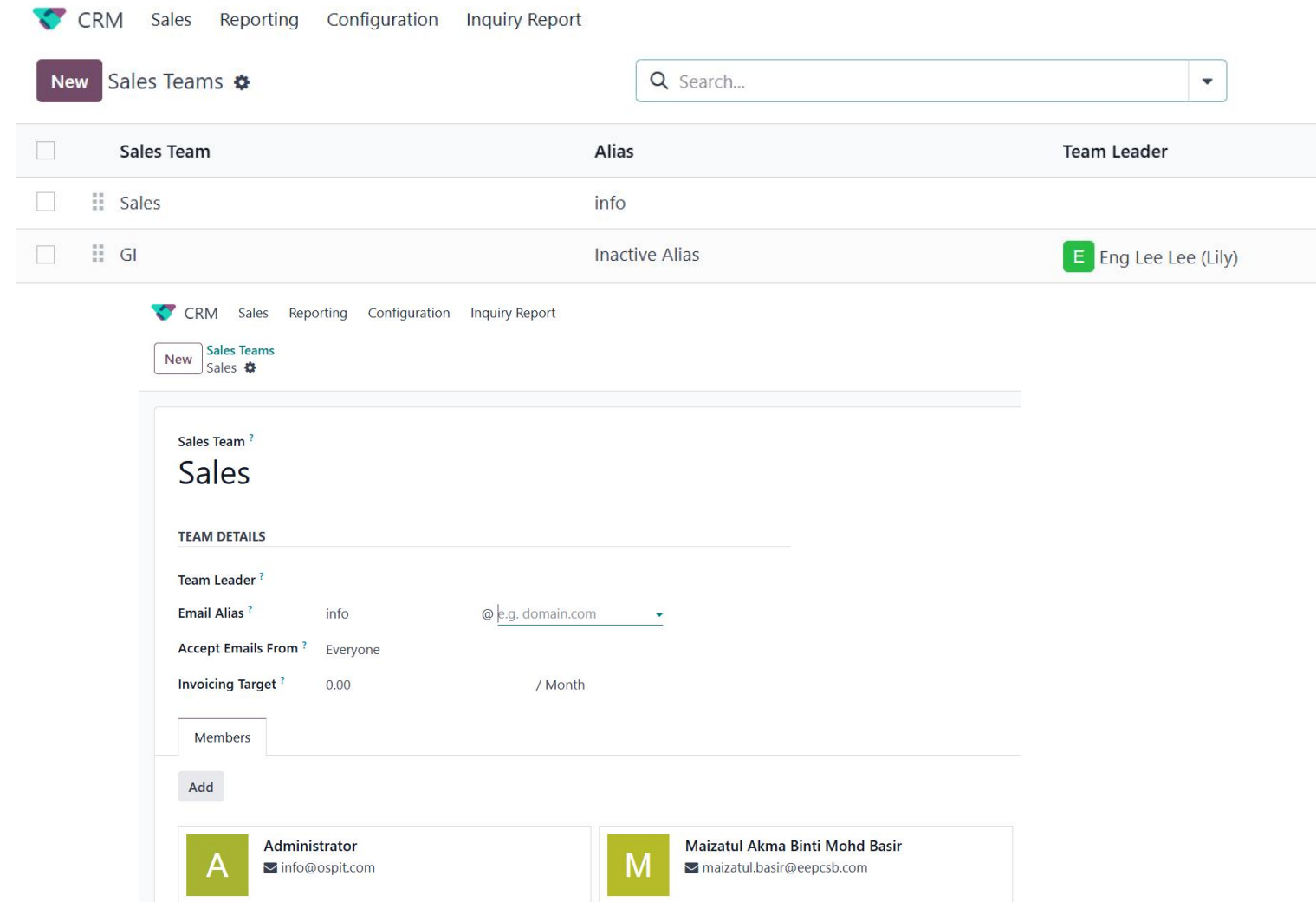
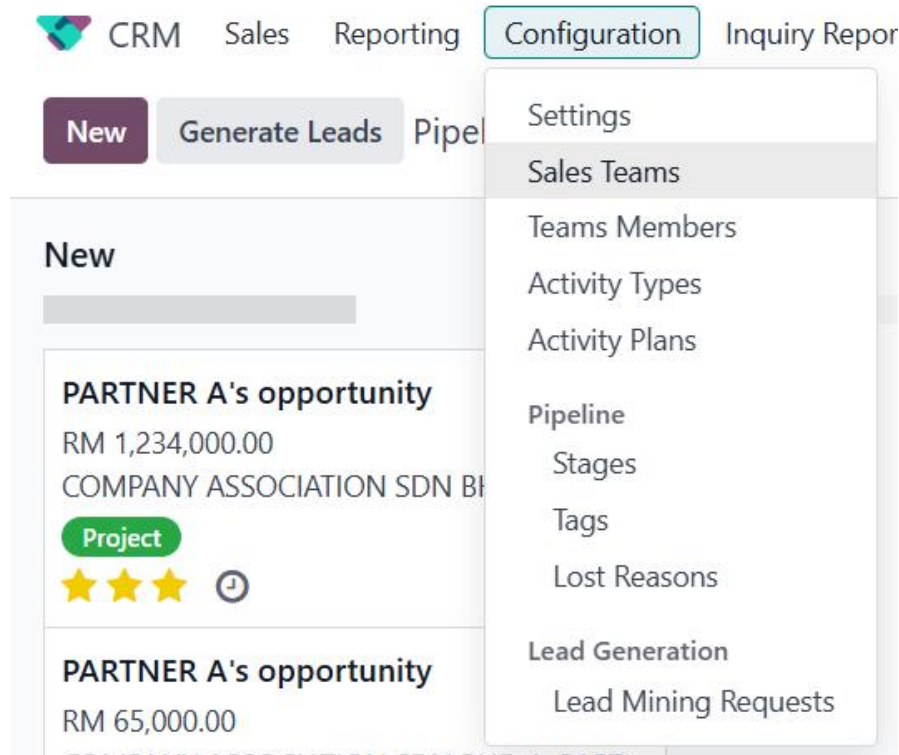
Purchase ? Administrator

WEBSITE

Website Editor and Designer

Sales teams

- Create the sales team with a leader and can put a invoicing target for that team by monthly
- Once have a teams, the salesperson allow to see the opportunity within their team only



Charge Code


Sales Team or Finance Team

 Sales Orders To Invoice Products Reporting **Charge Code** Configuration


New Charge Code Categories ⚙️

🔍  Type ✕ Search

<input type="checkbox"/>	Name
--------------------------	------

 Accounting Dashboard Customers Vendors Accounting **Charge Code** Reporting Configuration

New Charge Code Categories ⚙️

🔍  Type ✕ Search...

<input type="checkbox"/>	Name	Code
--------------------------	------	------

Table of content

- 1. Table of content-----2
- 2. Charge Code Definition-----3
- 3. Charge Code Maintenance-----4
- 4. Charge Code Mandatory for Sales Order-----5

Charge Code Definition


A Charge Code contains information on the Business Group, Business Unit, Product Brand.

E.g.


Business Group	Man Power
Business Unit	Air Compressor
Product Brand	SULLAIR
Charge Code	MP-AC-10




Charge Code Maintenance


Sales > Charge Code



 Accounting Dashboard Customers Vendors Accounting Charge Code Reporting Configuration

New

 Charge Code Categories 

  Type 


 Search... 

1-3 / 3  

7

1

H

<input type="checkbox"/> Name	Code	Business Type	
▼ Product Brand (15)			
<input type="checkbox"/> SULLAIR	10	Product Brand	
<input type="checkbox"/> Pall	20	Product Brand	
▼ Business Group (14)			
<input type="checkbox"/> Project	PJ	Business Group	
<input type="checkbox"/> Man Power	MP	Business Group	
<input type="checkbox"/> Spare Part	SP	Business Group	
▼ Business Unit (22)			
<input type="checkbox"/> Air Compressor	AC	Business Unit	
<input type="checkbox"/> Portable Air Compressor	PC	Business Unit	
<input type="checkbox"/> Filter	FR	Business Unit	
<input type="checkbox"/> Air Dryer	AD	Business Unit	

Charge Code: Mandatory for Sales Order

[CRM](#) [Sales](#) [Reporting](#) [Configuration](#) [Inquiry Report](#)

[Pipeline](#) / [PARTNER A's opportunity](#)
QT-2024-00543

Item Request
0

Revisions
0

[Send by Email](#) [Send PRO-FORMA Invoice](#) [Convert Currency](#) [Confirm](#) [Cancel](#) [Draft](#) [Quotation](#) [Sales Order](#) [Revised](#)

QT-2024-00543

Customer	COMPANY ASSOCIATION SDN BHD A, PARTNER JALAN A, TAMAN B KAMPUNG C BANDAR D KUL 55100 Malaysia	Expiration	01/19/2025
Job ?	SS10	Quotation Date ?	12/20/2024 08:14:55
Sub Job ?	SJ23	Pricelist ?	Default MYR pricelist (MYR)
Ref ?	SO/12/U1	Payment Terms	
Project Code ?		Business Group	Man Power
Doc No ?		Business Unit	Air Compressor
CPO Number		Product Brand	SULLAIR
Proposal Type ?		Charge Code	MP-AC-10
Invoice Address	COMPANY ASSOCIATION SDN BHD A, INVOICE	Cover Page	Upload your file
Delivery Address	COMPANY ASSOCIATION SDN BHD A, DELIVERY	Lead Type ?	Trading