



CLIENT RELATIONSHIP MANAGEMENT

Built for Malaysian SMEs

Let iCRM platform do the work for you. Use this to complement your virtual meetings. It's business as usual. Organize, track and sell with ease.

Contact Management
Task Management
Document Management
Membership Management
Employee Work Progression
Lead Management
SMS Marketing
Email Marketing
Workflow Automation
Reports and Dashboards
Customer Service Record

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iCRM Purposes

- ✓ To manage contact list, find out important contacts, and record all contact history.
- ✓ Manage employee's work, manage, and track work from home progress.
- ✓ Manage recurrence period such as memberships, product warranty, service due date etc.
- ✓ Achieve higher productivity with lower cost.



BizCloud App

BizCloud App is an application for Android and iOS. It can show crucial information on your phone. It is a companion to the whole CRM system.



iCRM Feature List

iCRM Applications help your business to build better customer relationships.

Manage Customers with Expiring Purchases

Send out email and SMS reminders automatically to remind customers regarding their subscriptions expiry date and remind them to make payment.

Manage Cases and Tasks for Employee

Record all employee cases and tasks in one system. You can list out all breakdown tasks, update task progression, set start date and end date.

Record Service History with Customers

The system can record all customer service history with service date, problem description and solution provided. You can also group the service record by using service case and problem category.

Reduce Cost and Improve Productivity

All the records are cloud-based which can reduce paper printing and the most crucial thing is the employee can trace back customer records in a short period and understand previous interactions with customers instantly.

Manage Customers with Memberships

Record customer membership category and different product prices for each membership category. Provide access permission to a special membership category to log in to the system.

Find Previous Record of Customer Interactions

All previous service record is searchable where the staff can trace the previous record by searching the client name or company name.

Work From Home Management

Employers can always track employee's work progression and performance by viewing their records in the iCRM system such as the number of new clients and amount of quotation issuance and closed success.

Digitize Files and Tag to Contact, Employee, etc.

Quotation, invoice, sales order and official receipt can generate directly from the system and issue to the customers. Person-in-charge and customer details can be inserted into the documents from the system directly.

iCRM Best Feature

Best feature of iCRM would be the strong support team behind the software. We provide online and offline support. The continuous improvement to the feature and software upgrade helps our client to achieve higher productivity with lower cost.



Contacts

iCRM provides you with user-friendly interface while managing your company's data. Contacts feature allows you to input new customer's and customer's personal information into the system. You also can assign a specific employee such as a sales person to be in charged of that particular customer. Keeping track of your client's needs will develop strong relationships between them and your company. A better service to your customers would mean higher closing rates and improved profitability for your business.

Contact List

- Contact List is where customers and non customers are listed. The list can be categorised by contact groups.
- Every SME should have a centralized contact list management to create a collection of contacts for marketing campaigns.

No.	Insert	Update	Member No.	GL	Name	Credit Term	Assign	Source Cat.	Email / Website	Group
1	07-Sep-21	29-Sep-21	MC000011	111000092	mem_t_1	debt: 133 Cr Lim: -1.00	Entry: acc1 assign			
2	07-Sep-21	02-Oct-21	MC000064	111000091	v1 add 1	Cr Lim: -1.00	Entry: acc1 assign	Facebook		
3	07-Sep-21	27-Sep-21	MC000065	111000090	A test 3 (222)	Cr Lim: -1.00	Entry: acc1 assign			
4	07-Sep-21	25-Sep-21		111000089	A test 2	Cr Lim: -1.00	Entry: acc1 assign			

Contact List

Categorize Your Contact With Contact Group

- You can create contact group as many as you want based on product type.
- Each customer can be classified into specific contact group.
- It helps to spread the right information to the right team for immediate action.

***Contact Group**

Group Name: [Dropdown Menu]

Account Software
Inserted by admin

Remark

Customer Remark

CCTV Inquiry

HRM Inquiry

iCRM Inquiry

Inventory Software Inquiry

PC Inquiry

Add | Save

Delete

Contact Group

Categorize Your Contact With Sales Progress

- Record each customer sales progress such as Initial Contact, Quotation, Meeting with Decision Maker, etc.
- This helps you assign a person in charge to that particular group for fast service and high closing rate.

The screenshot shows a contact form with a dropdown menu for 'Closing Stage'. The menu is open, displaying several options: '40%-Quotation', '0%-None', '20%-Init Contact', '40%-Quotation' (highlighted in blue), '60%-Meeting with Decision Maker', '80%-P.O received', '100%-Closed Success', and 'Failed'. Other visible fields include 'Date Created', '*Contact Group', 'Group Name', 'Account Software', and 'Remark'.

Sales Progress

Comprehensive Contact Information

- General info fields such as company name, contact number, email address, customer address
- Person-in-charge's information can be recorded for those contact is on behalf of company
- Personal background such as family information, working background and education background
- Membership information

The screenshot displays a comprehensive contact information form with multiple tabs: GENERAL INFO, BILLING INFO, EMPLOYEE, PERSONAL INFO, OTHERS, CONTACT AI, VOUCHER, RECURRENCE, JOB SEARCH, CONTACT SHARE, and VEHICLE. The 'GENERAL INFO' tab is active, showing fields for Name, Mobile, Phone 1, Phone 2, Fax, E-mail Address, Customer Status, Date Created, and Address. There are also sections for Membership Info and Photo.

Comprehensive Contact Information

Contact Source

- Files of the contact can be saved online. It can be set to link to your dedicated Google Drive account as your file storage.
- Multiple filters to find the target contact.
- Categorize your contact with customer source.

New Contact Source since 2021-06-01												
#	Month	Year	Null	Banner	Call In	e-market	Email	Facebook	Friends	Google	lazada call/ chat /website	POSmarket website
1	June	2021	16	0	47	2	23	7	1	12	1	4
2	July	2021	27	0	36	0	10	2	0	18	5	10
3	August	2021	21	0	32	0	16	4	0	17	0	10
4	September	2021	34	1	64	1	5	3	2	22	1	9

Contact Source Report

Service Record

Each service record can upload 4 files. The file is stored inside your Google Drive and managed by the iCRM. You can use phone camera to capture image and upload directly if you open the page with mobile phone.

Upload Files in Service Record



iCRM Mobile Login

Our iCRM system is accessible through mobile browser. You also can request others to add in the service record.

For example, you can send out the link to others like this:

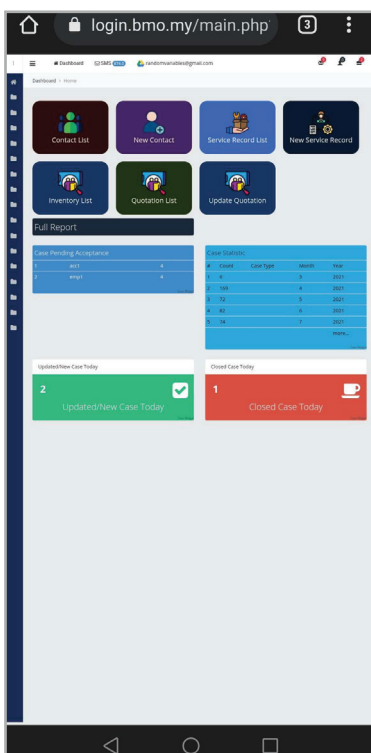
"I have created the contact, please add service record later."

<https://login.bmo.my/maincustomeradd.php?process=V2xkU2NHUkVTWGROYWtWNFRWUkpNZz09&customerid=VFZSVk1FOVTVFZPYWtsM1RXcEZlRTFVU1RJJPQ==>

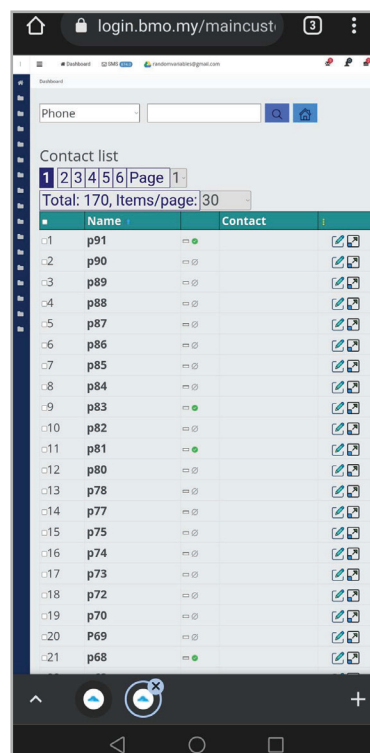
The user will need to login to the same company code to edit the service record.

Service Record Layout on Mobile Phone

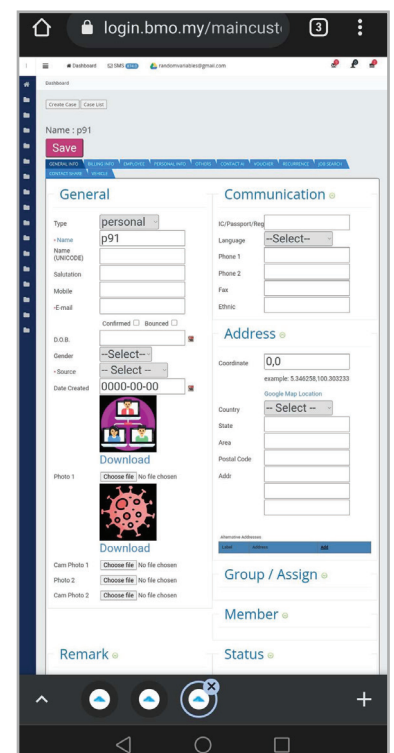
Contact list can be edited and relevant attachments can be added directly, and accessibility anytime, anywhere through the phone.



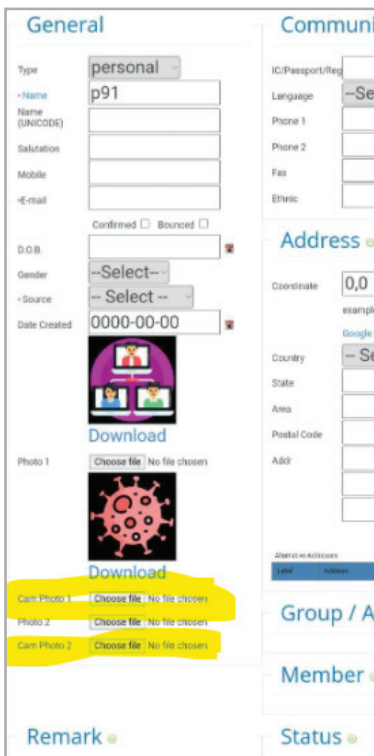
Mobile phone interface.



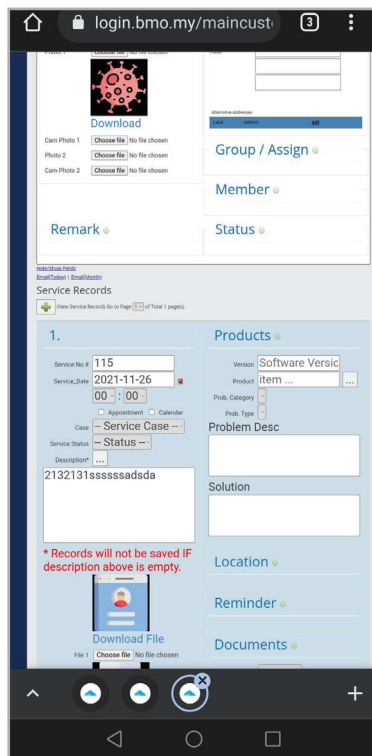
Mobile phone contact list. To edit a contact, click the edit icon.



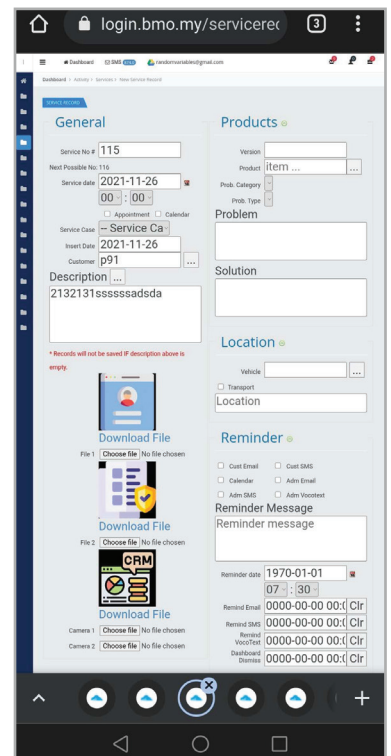
Editing the contact on mobile phone.



Click the “Cam Photo 1” to take photo and upload directly.



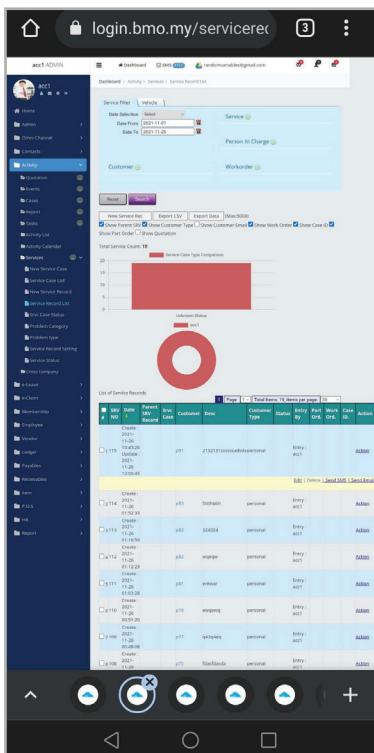
Service record view is under the contact list.



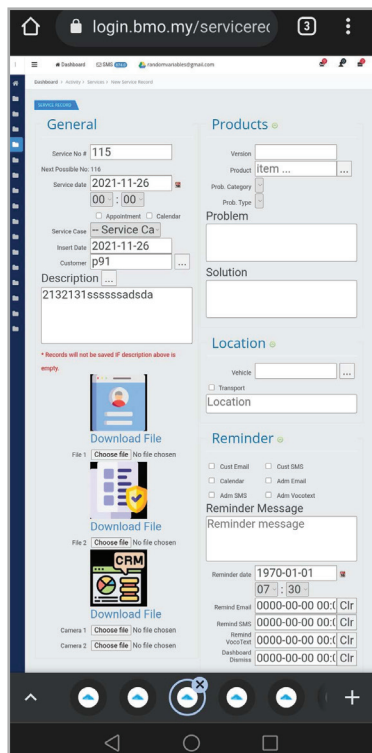
You can open and close the sections.

Service Record List on Mobile Phone

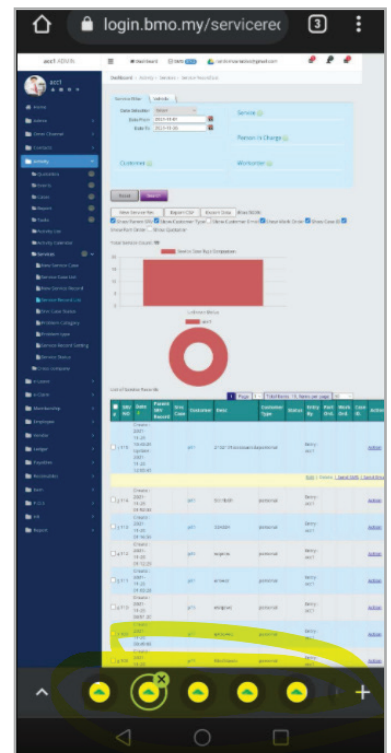
Users can find previous service record and edit directly from their smartphone.



You can find service record here.



Editing service record from phone.



Tab under browser helps navigation.

Service Record Layout in PC

Each service record can add up to 4 files, and these original file can be downloaded from the download link. It normally shows the thumbnails.

Service Records

(New Service Record) Go to Page 1 of Total 1 page(s)

1.

Files

Download File No file chosen

Download File No file chosen

Download File No file chosen

Download File No file chosen

Products

Version Software Version

Product Item

Prob. Category

Prob. Type

Problem Desc

Solution

Location

Vehicle

Transport

Reminder

Reminder date 1970-01-01

Reminder time 07:30

Reminder Email 0000-00-00 00:00:00

Reminder SMS 0000-00-00 00:00:00

Reminder WhatsApp 0000-00-00 00:00:00

Dashboard Datas 0000-00-00 00:00:00

Documents

Reference

Quotation

New_Quot_Status

Invoice

Assign

Service_by acc1

More

Inset By acc1

Last updated by: acc1 on 2021-11-26 12:02:02

Email CC

Work Order

Part Order Details

Order No

Work Order No

Case ID

Work Case ID

Collection

Amount 0.0000

Detail

Records will not be saved IF description above is empty.

Send SMS Send Email Delete Service Record [Service Record Form]

Service Record Layout in PC

Edit Service Record from PC

Each previous service record is editable when there is any updates.

Dashboard > Activity > Services > New Service Record

Service Record

General

Service No 115

Next Possible No 115

Service date 2021-11-26

Service Case

Inset Date 2021-11-26

Customer 891

Description 2132131ssssssaddda

Records will not be saved IF description above is empty.

Files

Download File No file chosen

Download File No file chosen

Download File No file chosen

Download File No file chosen

Products

Version Item

Product

Prob. Category

Prob. Type

Problem

Solution

Location

Vehicle

Transport

Reminder

Reminder date 1970-01-01

Reminder time 07:30

Reminder Email 0000-00-00 00:00:00

Reminder SMS 0000-00-00 00:00:00

Reminder WhatsApp 0000-00-00 00:00:00

Dashboard Datas 0000-00-00 00:00:00

Documents

Parent Service

Ref Doc

Related Quotation

New_Quot_Status

Related Invoice

Related Receipt

Assign

Service By acc1

More

Email CC to acc1

Work Order

Part Order Details

Work Order No

Case ID

Collection

Amount 0.0000

Remark

Save Delete

Editing Service Record from PC

Tools to Manage Contacts

Quotations

- You can generate quotation for your customers directly from the system into a PDF file.
- Each quotation is tagged with quotation status for easy reporting purpose.
- You can have real-time quotation status report such as “How many quotations are still pending this month?”



Generated Quotation

Total amount : 1092297					
Status Count					
Pending Review	Close Success	Close Fail	Duplicate	Total	
76	123	5	5	209	
895996.80	159159.20	20116.00	17025.00	1092297	
36.36%	58.85%	2.39%	2.39%	100%	

Example Quotation Status Report

Service Record

By creating the service records allows you to bring your customers and prospects to the next step easily with no loss of information especially appointment description, appointment date, reminder date and service record status. Each contact can have a service record list. Every services or conversation toward the contact should be entered.

Example of Service Record

Service Case and Service Product

The service record can be grouped by:

Service Case

Case	POS Inquiry	▼
Status	Closed Success	▼
	-- Status -- Walk In Online Demo Onsite Demo Quotation Sent Follow Up Closed Success Failed Online Setup & Training InHouse Pre-Installation/ Set Up	

Service Case Example

Service Product

Product	AB-7500 Touch Screen M	...
Prob. Cate.		▼
Prob. Type	Barcode Set	▼
	Barcode Set power adapter cannot turn on add payment method window corupted	

Serviced Product

- Each service case has predefined status. The supervisor can create case such as “Enquiry” and follow up with status like “Initial Contact”, “Quotation Sent”, “Quotation Failed”, “Meetup”, “Quotation Success”, etc.
- Each service record can be categorized with product serviced.
 - i) The serviced product is selected from item database, it can be “Printer” or “Monitor”.
 - ii) The item has a list of problem category. For example, Item “Printer” may have problems like paper stuck, print head dirty, driver problem, cable undetected, etc.
 - iii) To help categorized the problem, each problem can be separated into types. For example, “cable undetected” problem of item “printer” can have type like cable spoilt, comm port changed, no power, rotten bites, etc.
 - iv) A knowledge base is built by categorizing the service record item, problems, and type. User can search for recommended solution from previous service record. This helps a company to train the employees and further improve service quality.
 - v) The service record widget can be published to dashboard.

SV List

Description

Problem

Solution

Records 1 - 50 of Total 5268 Goto Page 1 | Prev | Next

No.	Desc	Problem	Solution	
1.	POS Support - printer not print - checked and found printer offline and usb port change. - set back to customer. can print. done			Select Category
2.	POS Pre-setup & test all hardware. (mini pc, monitor, cash drawer, receipt printer, keyboard, mouse, barcode scanner, usb flash drive, 4ch CCTV,) (done by Jia Hong & Seng Fung)			Select Category
3.	remind to service printer			Select Category
4.	discussed: - they are using laser printer, requested if they can use that instead of the thermal printer we suggested. - cost for thermal printer's ink - warranty for the whole set - lead time for us to set up everything in Kota Bharu as what we have discussed over the phone just now, please give me a quotation of the following items: touchscreen display 8.4" pole display cash drawer cpu bar code scanner			Select Category

Previous Service Problem and Solution

<h4>New Service Record Count</h4> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>2021-9</td><td>1047</td></tr> <tr><td>2021-8</td><td>922</td></tr> <tr><td>2021-7</td><td>845</td></tr> <tr><td>2021-6</td><td>971</td></tr> <tr><td>2021-5</td><td>931</td></tr> <tr><td>2021-4</td><td>1382</td></tr> <tr><td>2021-3</td><td>1310</td></tr> <tr><td>2021-2</td><td>1043</td></tr> <tr><td>2021-10</td><td>56</td></tr> <tr><td>2021-1</td><td>1122</td></tr> </table>	2021-9	1047	2021-8	922	2021-7	845	2021-6	971	2021-5	931	2021-4	1382	2021-3	1310	2021-2	1043	2021-10	56	2021-1	1122	<h4>Service Record By Person</h4> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>nadia</td><td>12</td></tr> <tr><td>raefik</td><td>7</td></tr> <tr><td>jerry</td><td>6</td></tr> <tr><td>alias</td><td>4</td></tr> <tr><td>thyejin</td><td>4</td></tr> <tr><td>alyssa</td><td>3</td></tr> <tr><td>izzat</td><td>3</td></tr> <tr><td>athirah</td><td>2</td></tr> <tr><td>Azfar</td><td>2</td></tr> <tr><td>christine</td><td>2</td></tr> </table>	nadia	12	raefik	7	jerry	6	alias	4	thyejin	4	alyssa	3	izzat	3	athirah	2	Azfar	2	christine	2	<h4>Service Record By Problem</h4> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Prob. Category</th> <th>Prob. Type</th> <th>Count</th> </tr> </thead> <tbody> <tr><td>Top up</td><td>Online top up</td><td>32</td></tr> <tr><td>HRM</td><td>E leave</td><td>4</td></tr> <tr><td></td><td>Barcode Set</td><td>2</td></tr> <tr><td>NVR Problem</td><td>Camera not function</td><td>1</td></tr> <tr><td>Weight Scale Problem</td><td>Item not exist after scan</td><td>1</td></tr> <tr><td>POS Setup/Training</td><td>POS Setup/Training</td><td>1</td></tr> <tr><td>Setting</td><td>Configure setting</td><td>1</td></tr> <tr><td>Printer setting</td><td>Reconfigure printer setting</td><td>1</td></tr> </tbody> </table>	Prob. Category	Prob. Type	Count	Top up	Online top up	32	HRM	E leave	4		Barcode Set	2	NVR Problem	Camera not function	1	Weight Scale Problem	Item not exist after scan	1	POS Setup/Training	POS Setup/Training	1	Setting	Configure setting	1	Printer setting	Reconfigure printer setting	1	<h4>Service Record Reminder</h4> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Contact</th> <th>Remind msg</th> <th>Remind Date</th> <th>Record Date</th> </tr> </thead> <tbody> <tr> <td>INCHZ IOT SDN BHD</td> <td>Bizcloud HRM for company code: inchzlot is expiry on 15 October 2021</td> <td>2021-10-04 10:00:00</td> <td>2021-08-11 15:13:05</td> </tr> <tr> <td>Optimus Business Solutions Sdn Bhd</td> <td>Bizcloud HRM company code optimusbis expire on 19 October 2021</td> <td>2021-10-04 10:00:00</td> <td>2021-09-10 09:39:30</td> </tr> </tbody> </table>	Contact	Remind msg	Remind Date	Record Date	INCHZ IOT SDN BHD	Bizcloud HRM for company code: inchzlot is expiry on 15 October 2021	2021-10-04 10:00:00	2021-08-11 15:13:05	Optimus Business Solutions Sdn Bhd	Bizcloud HRM company code optimusbis expire on 19 October 2021	2021-10-04 10:00:00	2021-09-10 09:39:30
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jerry	6																																																																																	
alias	4																																																																																	
thyejin	4																																																																																	
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Service Record Widget

Service by

- Each contact can be assigned to different employees.
- A service record can be service by multiple employees.
- The employee will be notified with a right hand drop down and assigned service record widget in dashboard.

Assign Service Record to Employee

Membership

- Contact can be a member. To make a contact as member, simply edit the contact and choose a membership category for the contact.
- The membership can be categorized by Membership Category and Membership Status.
- Membership category:
 - i) Simple membership category can be created easily.
 - ii) Special membership category can login to the system with permissions.

Adding Membership to Contact

Items Database

- Enter items into item database. Comprehensive information of items can be entered.
- Multiple Item price for can be set for different membership category. For example, bronze member price is higher while VIP member price can be lower.
- The item will be used in quotations.
- The item will be used for recurrence item. In this case, the item can be “1 year membership”, “1 year service fee”, etc.

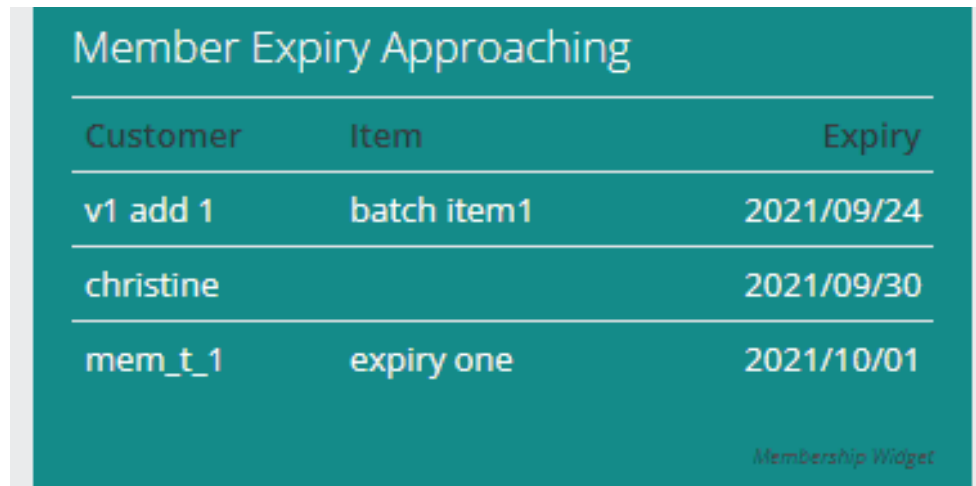
No.	Item	Desc	Category	Type	Options	Attributes	Tax	Last Trans	Action
1.	A-item	Drink1				B-Θ-M Serial: No	SR, Yes, %		
2.	avg Cost Item	Food				B-Θ-M Serial: No	SR, Yes 7, %	Inv INV-000079 on 2021-03-25	

No.	Loc	Unit	P.Type	Mem. Cat	Date	Cost.	U/Price	U/P. Nett	Reorder	On Hand	Action
1	Main	1 batch			From : 1 Jan 00 To : 1 Jan 00	Average Cost: 0.400.40	MYR	10.00	10.00	-110.00	More
2	Main	1 batch		Mem Cat1	From : 1 Jan 00 To : 1 Jan 00	Average Cost: 0.400.00	MYR	15.00	15.00	-110.00	More
3	Main	1 batch		mem cat2	From : 1 Jan 00 To : 1 Jan 00	Average Cost: 0.400.00	MYR	13.00	13.00	-110.00	More
4	Main	1 batch		VIP	From : 1 Jan 00 To : 1 Jan 00	Average Cost: 0.400.00	MYR	9.00	9.00	-110.00	More

Item Database with Multiple Price

Alert

- Membership widgets provide alert in dashboard.
- System will prompt an alert each time the predetermined time approaches.



Customer	Item	Expiry
v1 add 1	batch item1	2021/09/24
christine		2021/09/30
mem_t_1	expiry one	2021/10/01

Membership Widget

Membership Widget Showing Recurrence Item Expiring

Recurrence Product

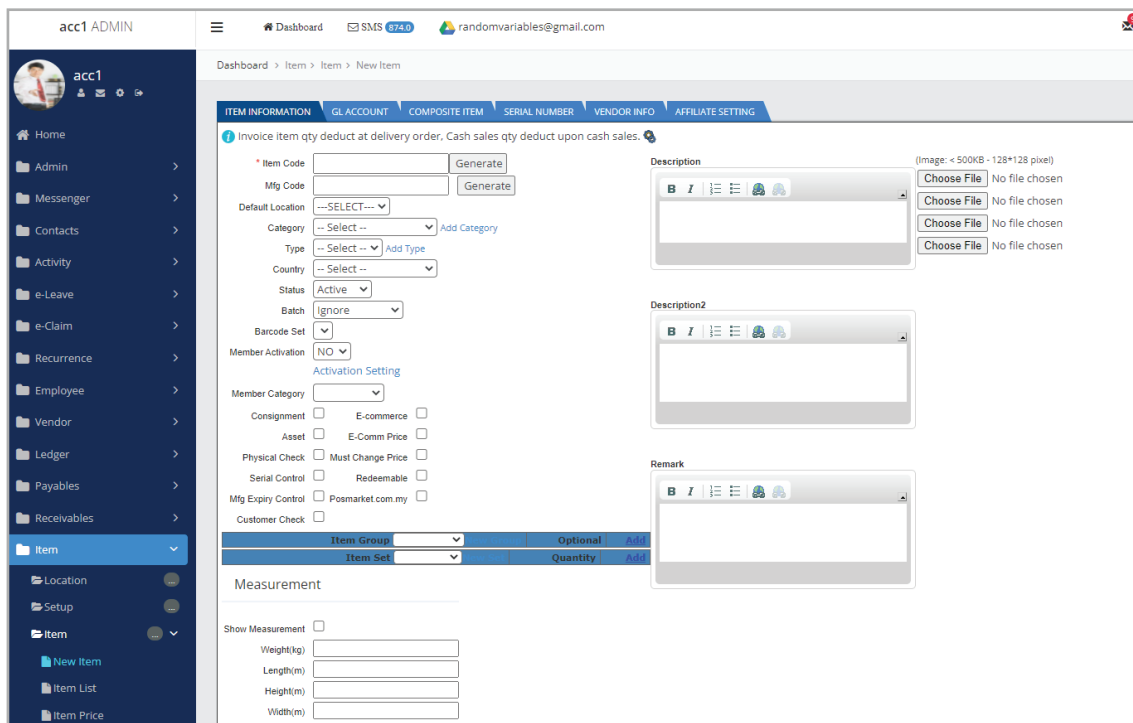
- For a membership / recurrence to expiry, the system needs to record the start and end date of the membership/product.
- Create an item, for example “1 year membership”.
- Go to “recurrence” link in recurrence list or contact list, select the item, and select the start and end date.
- Each recurrence or contact can select multiple products with multiple start and end date.
- The start and end date list can be found at recurrence list.

A recurrence item has start date and end date. Some of the recurrence items are:



Simple Steps

1. Create item as usual, set a price.



acc1 ADMIN

Dashboard SMS 8740 randomvariables@gmail.com

Dashboard > Item > Item > New Item

ITEM INFORMATION GL ACCOUNT COMPOSITE ITEM SERIAL NUMBER VENDOR INFO AFFILIATE SETTING

Invoice item qty deduct at delivery order. Cash sales qty deduct upon cash sales.

* Item Code Generate

Mfg Code Generate

Default Location ---SELECT---

Category -- Select -- Add Category

Type -- Select -- Add Type

Country -- Select --

Status Active

Batch Ignore

Barcode Set

Member Activation NO

Activation Setting

Member Category

Consignment E-commerce

Asset E-Comm Price

Physical Check Must Change Price

Serial Control Redeemable

Mfg Expiry Control Posmarket.com.my

Customer Check

Item Group Optional Add

Item Set Quantity Add

Measurement

Show Measurement

Weight(kg)

Length(m)

Height(m)

Width(m)

Description (Image: < 500KB - 128*128 pixel) Choose File No file chosen

Description2 Choose File No file chosen

Remark Choose File No file chosen

2. Pick the contact that will attach recurrence.

The screenshot shows a contact management interface with various search filters. The 'Contact list for the last 170 of 170 records' table is as follows:

No.	Insert	Update	Member No.	GL	Name	Credit Term	Assign	Source Cat.	Contact	Introducer	Group
1		26-Nov-21	30-Nov-21		111000163	p91	Cr Lim: -1.00		Entry: acc1 assign		
2		26-Nov-21	30-Nov-21		111000162	p90	Cr Lim: -1.00		Entry: acc1 assign		
3		26-Nov-21			111000161	p89	Cr Lim: -1.00		Entry: acc1 assign		

3. Choose the item accordingly, and setup start and end date.

The 'Choose Item' dialog box shows a list of items with the following data:

No.	Item	Category	Tick
1.	A-item -	Drink1	<input type="checkbox"/> Insert Selected
2.	avg Cost Item - avg Cost Item	Food	<input type="checkbox"/> Insert Selected
3.	batch item1 - batch item2	Food	<input type="checkbox"/> Insert Selected
4.	daily2 -	cat3-4	<input type="checkbox"/> Insert Selected
5.	expiry one -	cat3-4	<input type="checkbox"/> Insert Selected
6.	gst item 1 -		<input type="checkbox"/> Insert Selected

The 'RECURRENT' form on the left has the following values:

- Contact: p91
- Date: 2021-12-01
- Start Date: 2021-12-01
- End Date: 2021-12-01
- Item: (empty)
- Remark: (empty)

4. He bought two items with different end date.

The 'RECURRENT' form is identical to the previous screenshot. The 'Transaction History' table below it shows two entries:

No	Username	Customer	Start	End	Enter Date	Itemcode
1		p91	2021-12-01	2022-01-01	2021-12-01	batch item1
2		p91	2021-12-01	2021-12-01	2021-12-01	A-item

5. Filter recurrence expiry within 40 days from contact list.

The screenshot shows a contact list filtered by recurrence expiry within 40 days. The 'Contact list for the last 4 of 170 records' table is as follows:

No.	Insert	Update	Member No.	GL	Name	Credit Term	Assign	Source Cat.	Contact	Introducer	Group
1		26-Nov-21	30-Nov-21		111000163	p91	Cr Lim: -1.00		Entry: acc1 assign		
2		07-Sep-21	24-Nov-21	MC000011	111000092	mem_1	debt: 133 Cr Lim: -1.00		Entry: acc1 assign 012345 01234	AA5	
3		07-Sep-21	24-Nov-21	MC000064	111000091	v1 add 1	Cr Lim: -1.00	Facebook	Entry: acc1 assign 0123	ang2	

6. Recurrence list sort by end date.

No.	Name	UserName	Mem. No.	Category	Start	End	Item	Credit	Intro	Remark	Action
1.	v1 add 1		MC000064	Normal	2021-10-01	2022-09-30	service charge		Introducer: None Downline: 0		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2.	p91				2021-12-01	2022-01-01	batch item1		Introducer: None Downline: 0		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
3.	mem_t_1	rmm17	MC000011	Normal	2021-10-01	2021-12-17	recurr_daily	143	Introducer: None Downline: 0	test123	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
4.	v1 add 1		MC000064	Normal	2021-10-01	2021-12-10	test2		Introducer: None Downline: 0		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
5.	p91				2021-12-01	2021-12-01	A-item		Introducer: None Downline: 0		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
6.	christine			mem cat2	2021-09-19	2021-12-01	item 1		Introducer: None Downline: 0		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

7. He re-new another 10 days for same item.

8. Set delete permission to delete the transaction.

RECURRENCE

Contact: p91
 Date: 2021-12-01
 Start Date: 2021-12-01
 End Date: 2021-12-01
 Item:
 Remark:

Transaction History

No	Username	Customer	Start	End	Enter Date	Itemcode	Remark
1		p91	2021-12-02	2021-12-10	2021-12-01	A-item	renew another 10 days
2		p91	2021-12-01	2022-01-01	2021-12-01	batch item1	
3		p91	2021-12-01	2021-12-01	2021-12-01	A-item	

Permission

- Each login account is considered an employee in the system.
- Each login will be granted a permission group.
- The permission group define:
 - i) Which menu is accessible by the group?
 - ii) Which permission for example, delete, view, edit, save is granted for the login.
 - iii) The permission view can be set by admin from permission view menu. View permission defined whose data can be supervise by the other admin. For example, graphic design team supervisor can view all the downline while each of the employee can view only their own data.

Group Permission Setup

Group: Admin
 Description: Permission set for Admin
 Branch: acc1_hq

Module	Sub Menu	Access	Functions
Admin		<input checked="" type="checkbox"/>	
File	+Menu -Menu	<input checked="" type="checkbox"/>	
iReport List		<input checked="" type="checkbox"/>	
Company Info		<input checked="" type="checkbox"/>	+func -func
Branches	+Menu -Menu	<input checked="" type="checkbox"/>	
Edit Password		<input checked="" type="checkbox"/>	
User Access Log		<input checked="" type="checkbox"/>	
Configuration	+Menu -Menu	<input checked="" type="checkbox"/>	
Logout		<input checked="" type="checkbox"/>	
Home		<input checked="" type="checkbox"/>	
POS Terminal		<input checked="" type="checkbox"/>	
Edit Personal		<input checked="" type="checkbox"/>	+func -func
File Depot	+Menu -Menu	<input checked="" type="checkbox"/>	
Import Invoices		<input checked="" type="checkbox"/>	
List of Account		<input checked="" type="checkbox"/>	

Authorized personnel list (limit 50) [Full List](#)

Records 1 - 1 of Total 1

User Name	Status	Last login	Action
ACC1	ACTIVE	02 Oct 21 12:25 PM	Edit User Grp Perm Assign

Group Permission Setup

Username under Group Permission: Admin [Modify Branch Permission]

No	Date Join	Username	Group permission	Status	Action
<input checked="" type="checkbox"/>	1	2015-11-16	acc1	Admin	ACTIVE <input checked="" type="checkbox"/> Edit Permission Group Permission Assign

Users Not Supervised by acc1

Branch	Department	Date Join	Name	Username	Move To
<input type="checkbox"/>	acc1_hq	2021-09-27	MC000066	MC000066	<input type="checkbox"/>
<input type="checkbox"/>	acc1_hq	2021-09-16	MC17	MC17	<input type="checkbox"/>

Username Supervised by acc1

Move To	Department	Date Join	Name	Username
<input type="checkbox"/>	Admin Department	2015-11-16	acc1	acc1
<input type="checkbox"/>	Admin Department	2015-11-16	emp1	emp1
<input type="checkbox"/>	Admin Department	2015-11-16	staff1	staff1

View Permission

Case-task

- Differ from service record that starts with a contact, case and tasks starts by creating a case.
- For example, a “website update” is a case. In the case, there can be some predefined tasks such as:
 - i) Task 1: Decide on what to update
 - ii) Task 2: Prepare write ups
 - iii) Task 3: Prepare graphics
 - iv) Task 4: Uploads and updates
 - v) Task 5: Check and amend
 - vi) Task 6: Go live

Creating New Case

Assign member to the case, the member must login to accept the assignment.

- You can assign multiple employees to handle a case. Each member of the case has an acceptance date.
- By tracking the acceptance case, we will understand each task took how long and the outcome can be measure. This is important to understand employee’s key performance and provide a written documents to further push the group performance.
- Track case open and close date can help the supervisor understand each case period and eventually keep the case within budget and deliver superior quality.

Assign Member to the Case

NEW TEMPLATE

Template Title:

Description:

Set default

Add Procedure

No.	Procedure	Description	File	File Remark	Status
1.	<input type="text" value="Check up"/>	check all the keywords in campaign A.	<input type="text" value="Choose File"/> No file chosen	<input type="text"/>	-- Select --
2.	<input type="text" value="Other"/>	Update the keywords	<input type="text" value="Choose File"/> No file chosen	<input type="text"/>	-- Select --
3.	<input type="text" value="Meeting"/>	inform about the pay per click rate	<input type="text" value="Choose File"/> No file chosen	<input type="text"/>	-- Select --

Create Procedure Template

CASE INFORMATION | TASKS | CASE HISTORY

General | Info | Files

Case #

Next Possible No: CASE-00047

Subject

Date: 2021-12-04
Saturday, December 04 2021 21:02:21

Start Date: 2021-12-04 00:00

End Date: 00:00

Calendar Display:

Customer:

Client Ref:

Agent Ref:

Sub-Agent Ref:

Priority: -- Select --

Status: -- Select --

Case Value:

Sales Order #

Case Type: -- Select --

Item:

Procedure: **google marketing**

Purpose

Photo 1 No file chosen

Cam Photo 1 No file chosen

Photo 2 No file chosen

Cam Photo 2 No file chosen

Member

Member	Auto Assign Task	Accept Date	Save
acc1	<input type="checkbox"/>	<input type="text"/>	Delete
emp1	<input type="checkbox"/>	<input type="text"/>	Delete

Assign P.I.C Save

Location:

add mode:

New, Description

Procedure date: 2021-12-4

Procedure: Check up

Description: check all the keywords in campaign A.

Status: Pending Approval

New, Description

Procedure date: 2021-12-4

Procedure: Other

Description: Update the keywords

Status: Pending Approval

Procedure Chosen for the Case

TASK

Task

Subject:

Task Date: 2021-12-04

Task Start Date: 00:00

Task End Date: 00:00

Due Date:

Calendar Display:

Related to: -- Select --

Customer:

Task Type: -- Select --

Meeage:

Description:

Location:

Transport:

File Remark:

Reminder

Reminder 1: 00:00 -- SELECT --

Reminder 2: 00:00 -- SELECT --

Reminder 3: 00:00 -- SELECT --

Calendar Reminder Remind Cust
 Reminder SMS Remind Vocotext
 Reminder EMAIL

Files

New File

#	File Name	File Size	Action
---	-----------	-----------	--------

Contact Summary

P.I.C:

Mobile Phone No:

Phone No:

Email Address:

Team members

Asset

Approval

Create New Task

Case No : CASE-000046

CASE INFORMATION TASKS CASE HISTORY

Tasks

Task List | New Task

Date	Due	Status	Task	Entry	Member	Action
2021-12-03		Pending Approval	14 Desc: 1411	acc1		Edit Delete
2021-12-03		Pending Approval	16 Desc: 16	acc1		Edit Delete
2021-12-03		Pending Approval	17 Desc: 17	acc1		Edit Delete

update mode Submit Send Email

Attach Tasks to Case

CASE INFORMATION TASKS CASE HISTORY

General Info Files Reminder

Case # CASE-000046

Subject dd

Date 2021-12-02 Saturday, December 04 2021 21:06:46

Start Date 2021-12-02 00:00

End Date 0000-00-00 00:00

Calendar Display

Customer

Contact Number

Email

Client Ref

Agent Ref

Sub-Agent Ref

Priority -- Select --

Status **New**

Case Value

update mode Submit Send Email

Case Status

acc1 ADMIN

Dashboard Admin > Dashboard

Admin acc1

Dashboard Widgets

Widget	Order	Ver.	Description	Widget	Order	Ver.	Description	Widget	Order	Ver.	Description
Assigned Service Record				Case	0	2		Case Reminder			
Case-Tasks Alert				Comm Withdraw				Customer		2	
Customer Assign Alert				Email Guide				Employee		2	
Employee Birthday				Event Calendar		2		Event List			
General Notice		2		Info Widget				Inventory		2	
Invoice				Item Custom Expiry				Item Price Promotion Expiry			
Item Serial Mfg Expiry				Membership		2		Personal Quotation		2	
POS Dashboard		2		Purchase Order				Quotation		2	
Recurrence				Reorder Level				Resigned staff last day			
Sales Order				Service Record		2		Service Record Dashboard		2	
Stock Issue				Stock Request				Task Alert			

Case Task Widget for Dashboard

Full Report

Case Pending Acceptance

1	jmy	72
2	alzad	43
3	hady	38
4	amirul	30
5	edmund	25
6	jhtan	24
more...		

Case Statistic

#	Count	Case Type	Month	Year
1	6		3	2021
2	169		4	2021
3	72		5	2021
4	82		6	2021
5	74		7	2021
more...				

Updated/New Case Today 1

Closed Case Today 3

Dashboard Display of Case Task Widget



Telegram in iCRM

Telegram is an instant messaging application available on desktops, smart-phones, etc. It is widely used today. iCRM has integrated Telegram into the system for ease of communication with the contacts.

Setup Telegram in iCRM

You can set up Telegram bot account yourself or you can get our help to set up a Telegram bot account for you. After setting it up, you need to enter Telegram API key and Bot Name to iCRM and it is done.

No.	Bot Name	Bot ID	Default	Remark
1			yes	

Setup Telegram by Entering API Information

Get User to Subscribe Your Telegram

Get user to subscribe to your Telegram account, or by scanning the QR Code that is automatically generated beside the Telegram account after you have saved it. You can display the QR Code anywhere for your customers, employees, or anyone to scan to subscribe to your channel.

No.	TG User Name	1st Name	Last Name	Date	BMO Contact Name	Phone	Group	Email	Action
1.		H.P	Ang	2021-11-01 15:19:11	P32				Conversation Conv List Edit User
2.	myTYWONG	T.Y	Wong	2021-10-27 12:43:12	ang1		Laundry,Dental,Avid Motorist		Conversation Conv List Edit User

User that Subscribed to Your Telegram Account

Send Telegram Info

You can send photo, video, documents, or PDF files to your users. You can choose to send files that is uploaded or in any website. Simply paste the link into the textbox and type the message to send Telegram.

Send Telegram Info to Your Users

Telegram Keyword List

It can provide conversation automation which is auto-reply to the users who are using the keywords. For example, once a user subscribe, you can greet them, or ask for phone, name, etc.

Example: I created “verify” as the keyword, and create question 1 ask for account username, and question 2 ask for company name.

The screenshot shows the 'KEYWORD' configuration page. On the left, under 'Keyword', there are fields for 'Telegram Account' (set to 'mobiweb_ang_bot'), 'Keyword', 'Description', and 'Initial Chat'. Below these are 'Intro Message' and 'Complete Message' text areas with rich text editors. At the bottom of this section is an 'Add' button. On the right, under 'Questions', there is a 'New Question' text area, an 'Action' dropdown, an 'Order' field, and three URL fields for 'Photo URL', 'Video URL', and 'Document URL', each with an 'Add' button. Below the form is a table with columns: No., Question, Action, Order, Remark.

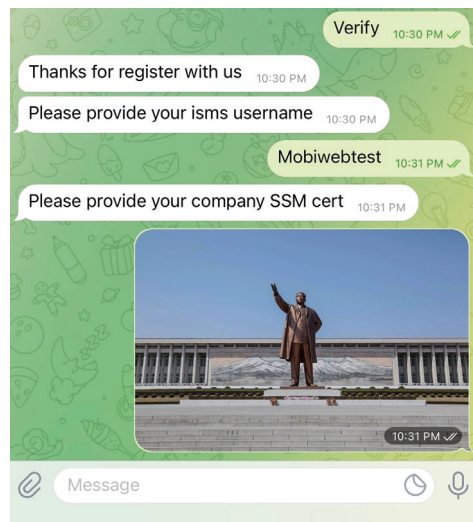
Telegram Keyword List

The screenshot shows the 'Conversation List' interface. At the top, there are filters for 'Date Selection', 'From Date' (2021-12-01), 'To Date' (2021-12-05), 'Phone Number', and 'e-Mail'. There are also fields for 'Telegram Acc' and 'User'. Below the filters are 'Reset', 'Search', and 'Conversation' buttons. A table below shows a list of conversations. The table has columns: No., Date, Phone, From, Message, Attachment, Keyword, and Action.

No.	Date	Phone	From	Message	Attachment	Keyword	Action
1.	2021-12-05 00:25:49	Gh	H.PAng	Gh	in	rt	

Conversation List Show User Reply to the Keyword

This is the sample of auto-reply when users send the “verify” keyword.



Example from the Phone

SMS or Email

- SMTP accounts refer to the email server that is being used in the system. You are recommended to set your SMTP server to fully utilize the email alert service.
- Send SMS can be done by selecting contacts to send SMS. The SMS function is powered by iSMS.com.my.

No	Host	Username	Max Quota	Ttl. Usage Today	SMTP Status	Company Use	Default SMTP	Active	Action
1	alienmailer.com	mailer@alienmailer.com	100	8		Yes	No	Yes	Default SMTP Edit Test SMTP

Example Email SMTP Setup

If you do not have an sms account, please register a membership at isms.com.my to start using SMS marketing.

ISMS ACCOUNT CONFIGURATION

iSMS balance: 874.0 credits

iSMS username:

iSMS password:

Company use:

Long Message:

Message Type:

[Reload SMS Credit](#)

SMS Account Setup

Employees

- Manage general employee hiring, confirmation, resign, etc.
- Each login account is considered as an employee.
- Comprehensive employee information can be entered into the system.
- Employee related file such as certificate, signed letters, etc. can be uploaded into the system.
- The login user or employee can be assigned to a service record, case, etc.
- Assign respective personnel to follow up case.
- Track personal work performance:
 - When does an employee complete the service record?
 - When does an employee complete a case?
- The employee can be assigned different view permission to limit access to menu or function such as edit and delete.

No.	Name	Join	Branch	Login Name	Sales	Leave	Apprv	Claim	Apprv	Status	Action
1	acc1	16 Nov 15	Branch : acc1_hq Perm : Admin Dept : Admin Department	acc1 Employee Type=Permanent staff LastLogin:2021-10-02 12:25:54	0.00	Y		Y		ACTIVE Type=ADMIN	action
2	staff1	16 Nov 15	Branch : acc1_hq Perm : Staff Dept : Admin Department	staff1 Employee Type=Permanent staff LastLogin:0000-00-00 00:00:00	0.00	Y		Y		ACTIVE Type=EMPLOYEE	action
3	emp1	16 Nov 15	Branch : acc1_hq Perm : Employee Dept : Admin Department	emp1 Employee Type=Permanent staff LastLogin:0000-00-00 00:00:00	0.00	Y		Y		ACTIVE Type=EMPLOYEE	action
4	234		Perm :	234 Employee Type=	0.00					ACTIVE Type=EMPLOYEE	action

Example Employee List

PERSONAL | SYSTEM ACCOUNT | EMPLOYMENT | BANK INFO | EMERGENCY | FAMILY | MEDICAL | EDUCATION | PORTAL | AGENT COMMISSION | CERTS. | AVOIP

*Name: (as per NRIC)

Nick Name:

*IC:

Passport No.:

Address:

Town / City:

State / Province:

Postal Code:

Country:

Nationality:

Race:

Religion:

Sex:

D.O.B:

*Hand-phone: Format: 60121234567

Home No.:

Office No.:

Fax No.:

*Email:

Website:

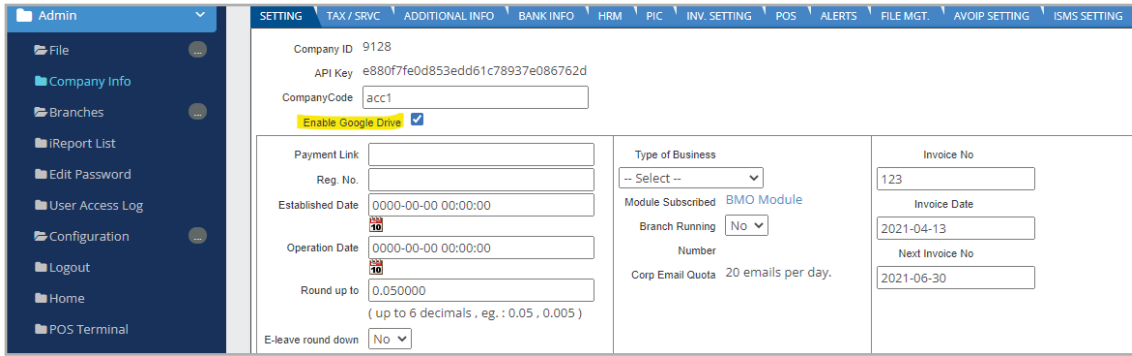
Marital Status:

Group Name:

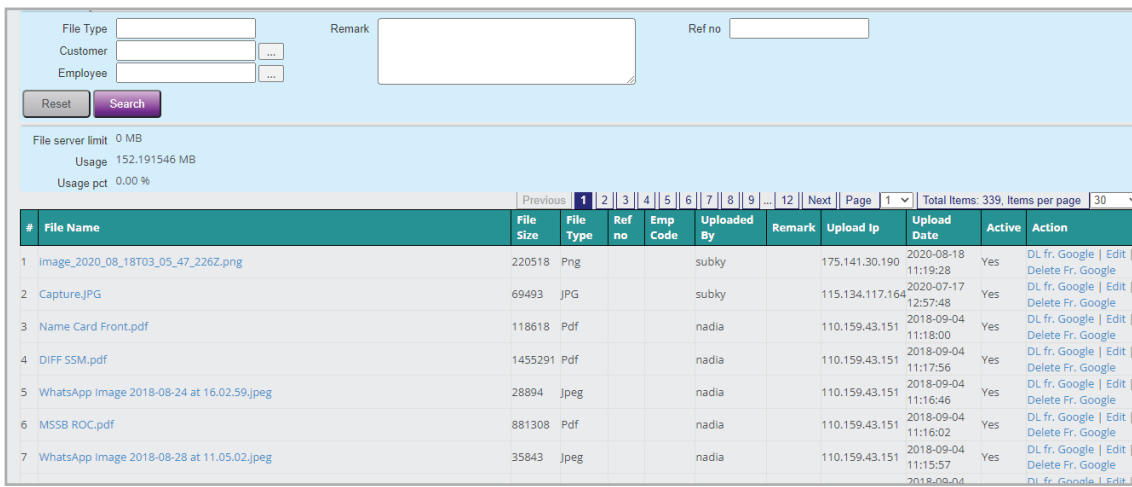
Comprehensive Employee Data

Files

- The system can be linked to a dedicated Google Drive. We always suggest our client to get a Google drive to start with.
- Employee's file can be uploaded into the Google Drive and tag to the employee.
- Contact related files can also be uploaded and tag to the client.
- General file upload and download can be managed with the system.
- Google Drive maintain all their securities and it is stand-alone.



Enable Google Account from Company Info



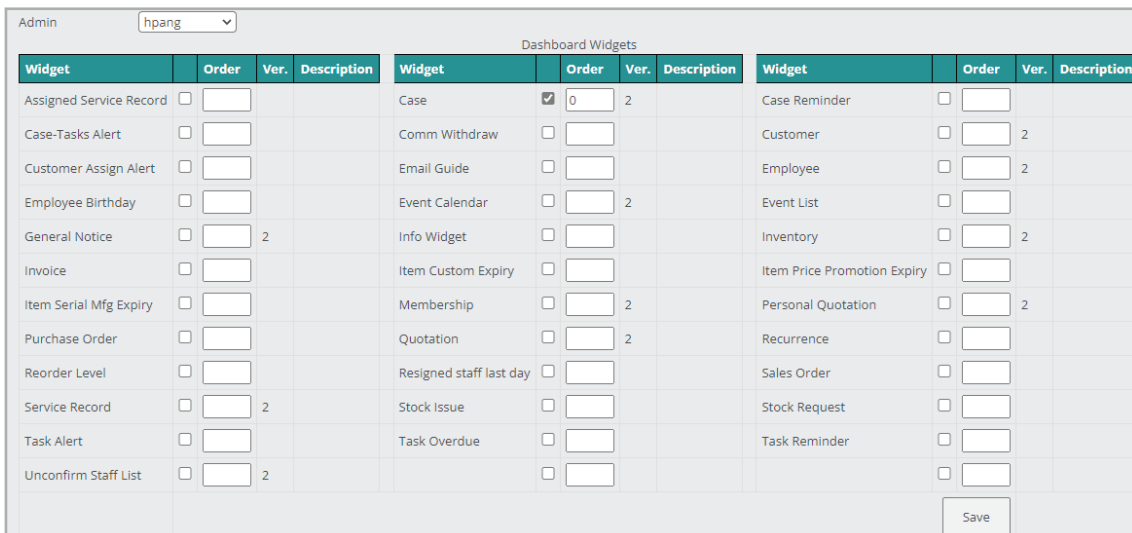
#	File Name	File Size	File Type	Ref no	Emp Code	Uploaded By	Remark	Upload Ip	Upload Date	Active	Action
1	image_2020_08_18T03_05_47_226Z.png	220518	Png			subky		175.141.30.190	2020-08-18 11:19:28	Yes	DL fr. Google Edit Delete Fr. Google
2	Capture.JPG	69493	JPG			subky		115.134.117.164	2020-07-17 12:57:48	Yes	DL fr. Google Edit Delete Fr. Google
3	Name Card Front.pdf	118618	pdf			nadia		110.159.43.151	2018-09-04 11:18:00	Yes	DL fr. Google Edit Delete Fr. Google
4	DIFF 55M.pdf	1455291	pdf			nadia		110.159.43.151	2018-09-04 11:17:56	Yes	DL fr. Google Edit Delete Fr. Google
5	WhatsApp Image 2018-08-24 at 16.02.59.jpeg	28894	jpeg			nadia		110.159.43.151	2018-09-04 11:16:46	Yes	DL fr. Google Edit Delete Fr. Google
6	MSSB ROC.pdf	881308	pdf			nadia		110.159.43.151	2018-09-04 11:16:02	Yes	DL fr. Google Edit Delete Fr. Google
7	WhatsApp Image 2018-08-28 at 11.05.02.jpeg	35843	jpeg			nadia		110.159.43.151	2018-09-04 11:15:57	Yes	DL fr. Google Edit Delete Fr. Google

File List of File Uploaded

Widget

Widgets are small notifications that is loaded in dashboard. There are multiple widgets to help you manage all aspects.

- Employee widget shows employee related information.
- Customer widget shows simple analysis of your contacts.
- Contact birthday widget alert approaching contact birthday.
- Membership alerts membership expiry date.
- More widget are being updated from time to time.



Widget	Order	Ver.	Description	Widget	Order	Ver.	Description	Widget	Order	Ver.	Description
Assigned Service Record	<input type="checkbox"/>	<input type="text"/>		Case	<input checked="" type="checkbox"/>	0	2	Case Reminder	<input type="checkbox"/>	<input type="text"/>	
Case-Tasks Alert	<input type="checkbox"/>	<input type="text"/>		Comm Withdraw	<input type="checkbox"/>	<input type="text"/>		Customer	<input type="checkbox"/>	<input type="text"/>	2
Customer Assign Alert	<input type="checkbox"/>	<input type="text"/>		Email Guide	<input type="checkbox"/>	<input type="text"/>		Employee	<input type="checkbox"/>	<input type="text"/>	2
Employee Birthday	<input type="checkbox"/>	<input type="text"/>		Event Calendar	<input type="checkbox"/>	<input type="text"/>	2	Event List	<input type="checkbox"/>	<input type="text"/>	
General Notice	<input type="checkbox"/>	<input type="text"/>	2	Info Widget	<input type="checkbox"/>	<input type="text"/>		Inventory	<input type="checkbox"/>	<input type="text"/>	2
Invoice	<input type="checkbox"/>	<input type="text"/>		Item Custom Expiry	<input type="checkbox"/>	<input type="text"/>		Item Price Promotion Expiry	<input type="checkbox"/>	<input type="text"/>	
Item Serial Mfg Expiry	<input type="checkbox"/>	<input type="text"/>		Membership	<input type="checkbox"/>	<input type="text"/>	2	Personal Quotation	<input type="checkbox"/>	<input type="text"/>	2
Purchase Order	<input type="checkbox"/>	<input type="text"/>		Quotation	<input type="checkbox"/>	<input type="text"/>	2	Recurrence	<input type="checkbox"/>	<input type="text"/>	
Reorder Level	<input type="checkbox"/>	<input type="text"/>		Resigned staff last day	<input type="checkbox"/>	<input type="text"/>		Sales Order	<input type="checkbox"/>	<input type="text"/>	
Service Record	<input type="checkbox"/>	<input type="text"/>	2	Stock Issue	<input type="checkbox"/>	<input type="text"/>		Stock Request	<input type="checkbox"/>	<input type="text"/>	
Task Alert	<input type="checkbox"/>	<input type="text"/>		Task Overdue	<input type="checkbox"/>	<input type="text"/>		Task Reminder	<input type="checkbox"/>	<input type="text"/>	
Unconfirm Staff List	<input type="checkbox"/>	<input type="text"/>	2		<input type="checkbox"/>	<input type="text"/>			<input type="checkbox"/>	<input type="text"/>	

Widget Setting

CONTACT US

Malaysia Hotline **1800 87 7061**

Mon - Fri 9AM - 6PM

Sat 9AM - 6PM

Sun 2PM - 6PM



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