

CRM – IMPLEMENTER
VERSION 2
DATE: 10 JULY 2025

PART 1 – IMPLEMENTER DASHBOARD

The dashboard displays the following key metrics:

- Demo Session: 15
- Prospect Reminder: 145
- Software Handover: 609
- Hardware Handover: 50
- No Respond Leads: 0
- Others: 0

Under the "Software Handover - Completed" section, there is a table with the following data:

ID	SalesPerson	Implementer	Company Name	Status	Actions
SW_250607	Abdul Aziz	Ahmad Syazwan	DE MANEIZ COTEA CAFE	Completed	⋮ Actions
SW_250606	Farhanah Jamil	Ahmad Syazwan	TRONAS ELECTRONIC SDN. BHD.	Completed	⋮ Actions
SW_250605	Vince Leong	Ahmad Syazwan	YEELING TRADING SDN BHD	Completed	⋮ Actions
SW_250604	Jonathan	Mohd Amirul Ashraf	KTA (SARAWAK) SDN BHD	Completed	⋮ Actions
SW_250603	Muhammad Khoirul Bariah	Ahmad Syazwan	ALVA HOLDING SDN BHD	Completed	⋮ Actions

Showing 1 to 5 of 607 results

MAIN TAB

NO1 – PROJECT STATUS

SUB TAB (ALL / CLOSED / OPEN / DELAY / INACTIVE)

NO2 – LICENSE CERTIFICATE

SUB TAB (PENDING / COMPLETED)

NO3 – DATA MIGRATION

SUB TAB (PENDING / COMPLETED)

NO4 – PROJECT FOLLOW UP

SUB TAB (TODAY / OVERDUE)

NO5 – TICKETING SYSTEM

SUB TAB

INTERNAL TODAY /

INTERNAL OVERDUE /

EXTERNAL TODAY /

EXTERNAL OVERDUE /

NO6 – NEW REQUEST

SUB TAB

CUSTOMIZATION – PENDING /

CUSTOMIZATION – COMPLETED /

ENHANCEMENT – PENDING /

ENHANCEMENT – COMPLETED /

PART 2 – IMPLEMENTER TAB VIEW

This screenshot shows the Company tab view. At the top, there are tabs: Lead, Company (which is selected), System, Refer & Earn, Appointment, Prospect Follow Up, Quotation, Proforma Invoice, Invoice, Debtor Follow Up, Software Handover, and Hardware Handover. Below the tabs, there are three main sections: Company Details, Person In-Charge, and Status.

- Company Details:**

Company Name	Postcode
DE MANEIZ COTE A CAFE	98100
Company Address 1	State
CG. 06A EMART COMMERCIAL CENTRE,	Sarawak
Company Address 2	Industry
BLOCK B, PHASE 3, JALAN TUDAN, MIRI	F&B
New Reg No.	
202503079433	
- Person In-Charge:**

Name	MOHD. ISKANDAR BIN MOHD. ZUNAIDI
Contact No.	60105928022
Email Address	manjalela820@yahoo.com
Position	owner
- Status:**

Deal Amount	RM 922.00
Quotations	TTC/FZ/250974 TTC/AZ/250956
Status	Inactive : Closed
Edit	

This screenshot shows the Implementer Appointment tab view for the company "DE MANEIZ COTE A CAFE". The status is shown as "Closed". Below the tabs, there is a section for "Implementer Appointments" with a button to "Add appointment".

IMPLEMENTER VIEW

TAB 1	PHASE 1	COMPANY
TAB 2	PHASE 1	IMP PIC DETAILS
TAB 3	PHASE 1	IMP NOTES
TAB 4	PHASE 1	IMP FOLLOW UP
TAB 5	PHASE 1	IMP APPOINTMENT
TAB 6	PHASE 1	IMP DATA FILES
TAB 7	PHASE 1	IMP SERVICE FORM
TAB 8	PHASE 1	IMP OTHER FORM
TAB 9	PHASE 2	IMP PROJECT PLAN
TAB 10	PHASE 2	IMP CUSTOMIZATION
TAB 11	PHASE 2	IMP ENHANCEMENT
TAB 12	PHASE 3	IMP INTERNAL TICKET -BETWEEN TIMETEC HR STAFF ONLY -BETWEEN QC / RND / PDT
TAB 13	PHASE 3	IMP EXTERNAL TICKET -BETWEEN CUSTOMER

TAB 1 / COPANY TAB

PROJECT INFORMATION

IMPLEMENTER NAME:

PROJECT STATUS: OPEN / DELAY / INACTIVE / CLOSE

PROJECT STATUS CAN BE EDIT BY THAT IMPLEMENTER ONLY.

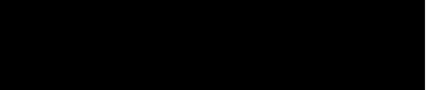
TAB 2 / IMP PIC DETAILS

ADD NEW PIC

↑↓ Person In Charge 1			
Name*	Position	HP Number*	Email Address*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
↑↓ Person In Charge 2			
Name*	Position	HP Number*	Email Address*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add PIC"/>			

TAB 3 / IMP NOTES

ADD NEW NOTES

Add Follow Up	Add Notes	X
		
Remarks* Notes		
<input type="text" value="Enter remarks here..."/>		
		
<input type="button" value="Submit"/>		<input type="button" value="Cancel"/>

TAB 4 / IMP FOLLOW UP

ADD NEW FOLLOW UP

Add Follow Up X

Remarks* **Follow Up**

Enter remarks here...

Submit **Cancel**

THE MOMENT ADMIN SOFTWARE ASSIGN TO THE IMPLEMENTER

> SYSTEM AUTO CREATE FIRST FOLLOW UP AS PER BELOW

> NEW PROJECT ASSIGNMENT

TAB 5 / IMP APPOINTMENT

Malaysia

Add Implementation Appointment

DATE (MONDAY-THURSDAY/FRIDAY)*

SESSION*	START TIME	END TIME
SESSION 1	09:30	10:30

DEMO TYPE APPOINTMENT TYPE* IMPLEMENTER*

KICK OFF MEETING SESSION ONLINE Select a implementer

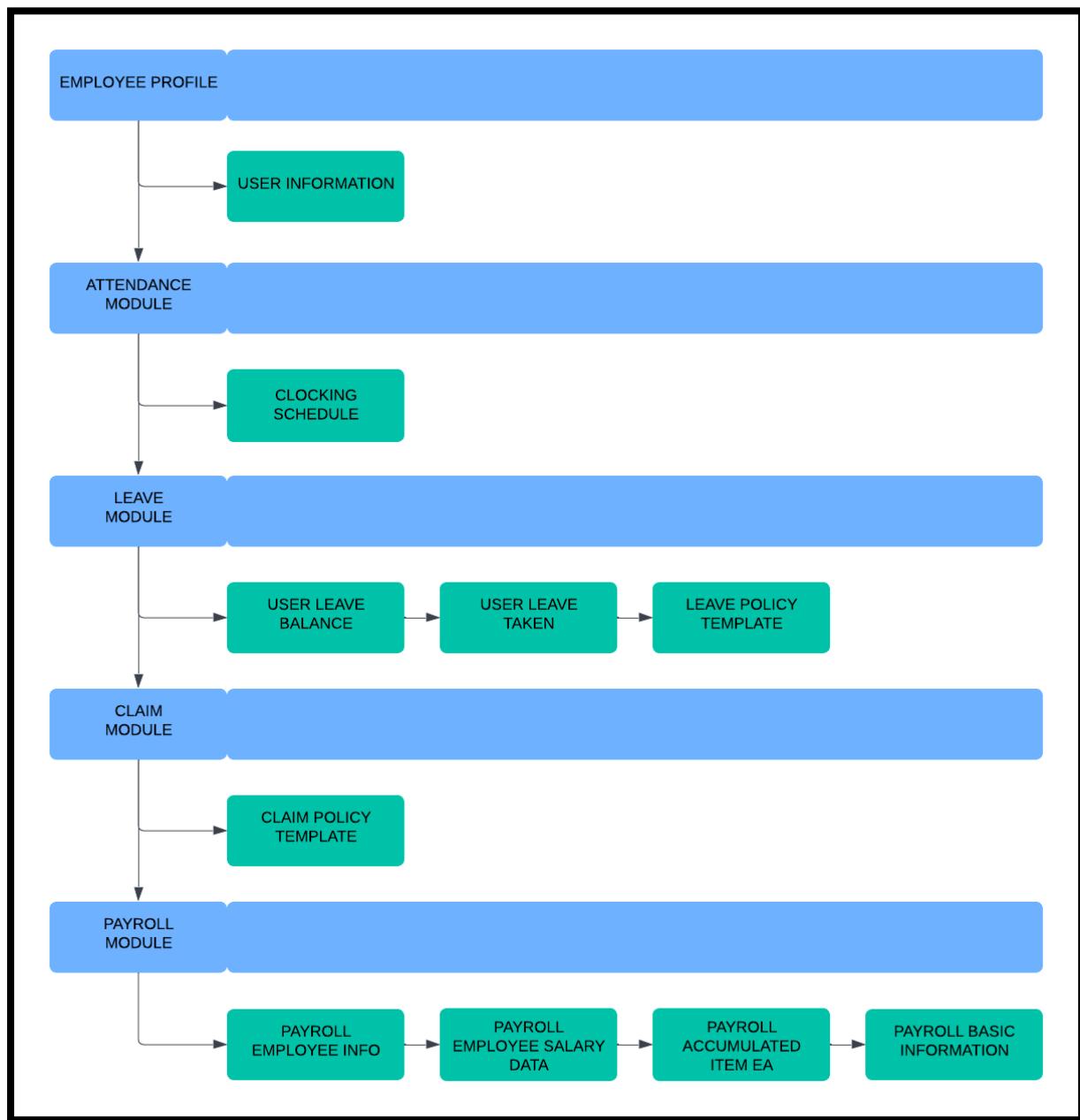
REQUIRED ATTENDEES

Separate each email with a semicolon (e.g., email1;email2;email3).

REMARKS

DATE	SESSION 1/2/3/4/5 DROP DOWN SESSION 1 (0930-1030) SESSION 2 SESSION 3	
DEMO TYPE	APP TYPE	IMP NAME AUTO RETRIEVE FROM THE PROJECT INFORMATION AND CANNOT BE CHANGE.

TAB 6 / IMP DATA FILES



TAB 7 / IMP SERVICE FORM

ADD NEW SERVICE FORM

The screenshot shows a 'Service Form' interface with a black redacted header. It features two main sections: 'Service Form 1' under 'Email' and 'Service Form 1' under 'Attachment'. The 'Email' section contains a text area labeled 'ENTER REMARKS HERE' and a button 'Add Another Remark'. The 'Attachment' section has a placeholder 'Drag & Drop your files or [Browse](#)'.

TAB 8 / OTHER FORM

UPLOAD – KICK OFF MEETING SLIDE / ONE DRIVE LINK

UPLOAD – PROJECT PLAN / ONE DRIVE LINK

UPLOAD – UAT FORM / PDF

UPLOAD – HANDOVER FORM / PDF

PART 3 – IMPLEMENTER CALENDAR