



ORION DEAL DESK

Solution

Operations and User Guide

PREPARED FOR : VADS Berhad



ORION Operation & User Guide



VERSION CONTROL

Version No.	Change Description	Author	Date
V 1.0	Orion User Guide	Norman Sara	12 th November 2016
V 2.0	Orion User Guide based on the new design	Norman Sara	14 th March 2017

If the document is a controlled document, then it must contain the Version Control Section (as above).



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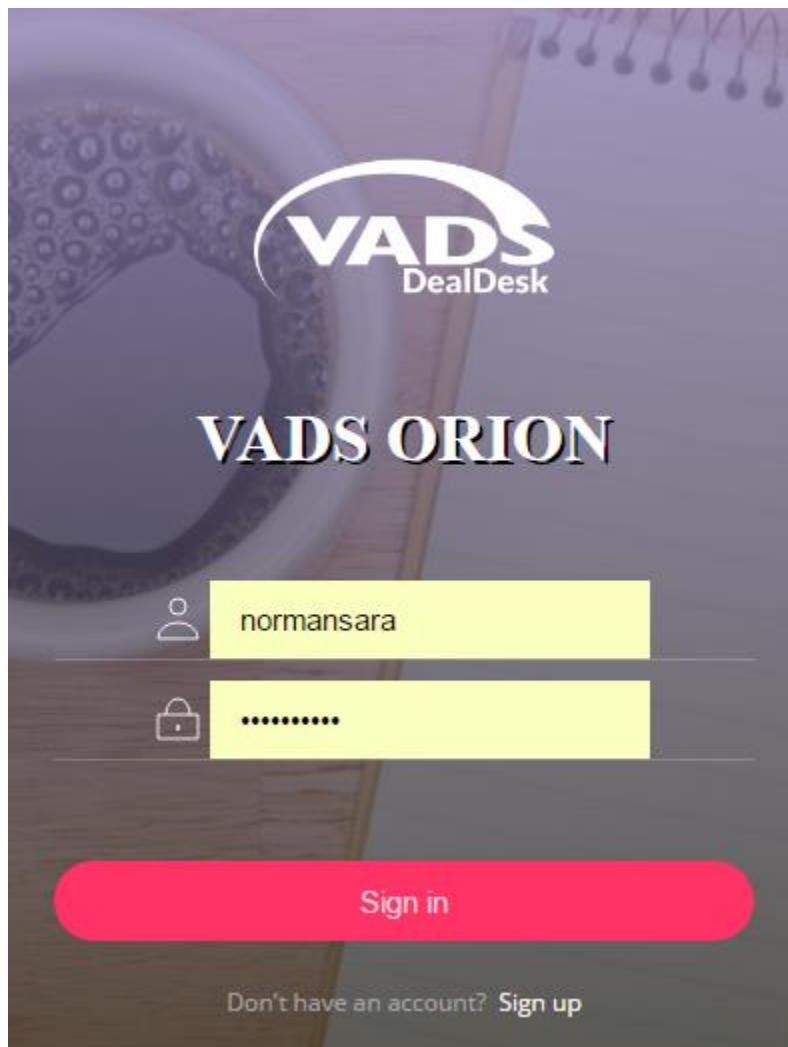
1) Logon to System

1. *Logon page*

To login to the Orion System, go to the URL

<http://49.236.195.52/rapid4/login.aspx?AppID=127c9cb2-eacc-41ff-ab3c-a100a87519fe>

the **Login** page will show as below;



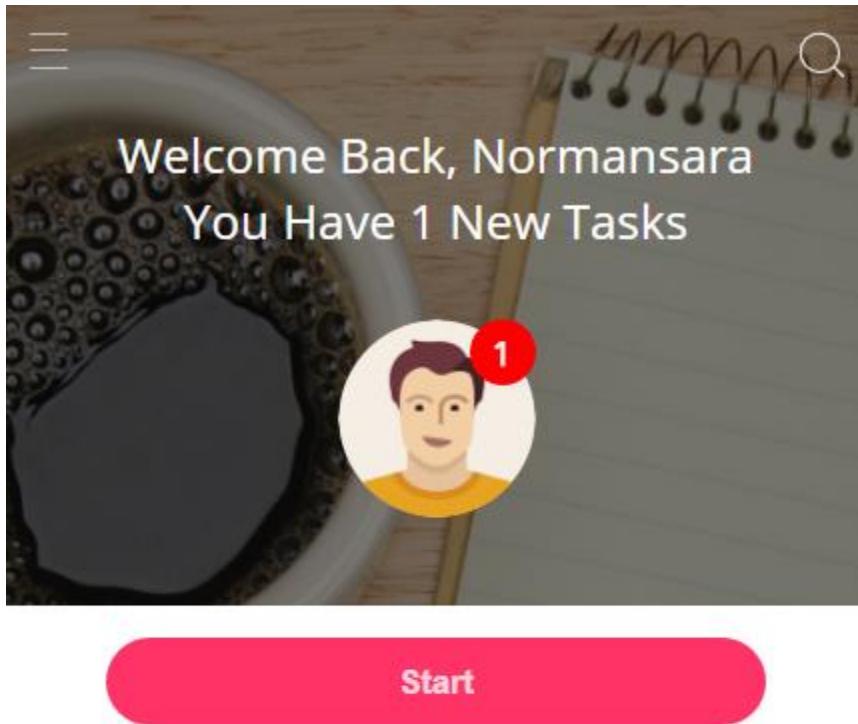
After enter the

<input type="text"/> Username	<input type="password"/> Password
--------------------------------------	------------------------------------------

then click on the **Sign in** button

2. Welcome Page

Once you log into the system, you can see **Welcome Page** as below.



From this page, user can see the ***pending task and no of pending task***.



Request evaluation for quotation
12/Nov/2016 02:01 PM By Normansara

The following button lead the action as below;

Start

- ***Start button***, the system will take you to the main page.

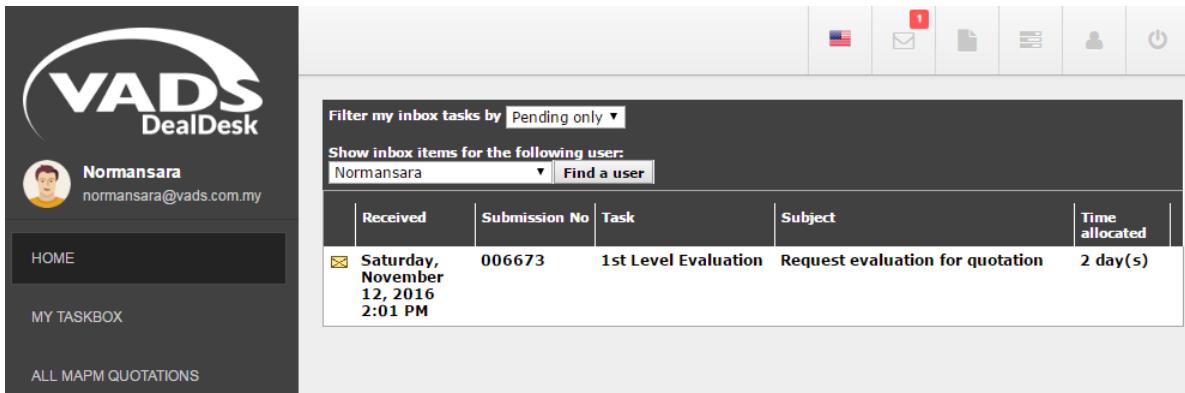


- ***Sign out button***, will log you out from the system.

2) Main Page and Menu

1. Main Page

Below were the **Main Page** of the system.



The screenshot shows the VADS DealDesk interface. On the left is a sidebar with a user profile for 'Normansara' (normansara@vads.com.my), navigation links for 'HOME', 'MY TASKBOX', and 'ALL MAPM QUOTATIONS', and a logo for 'VADS DealDesk'. The main area is titled 'Filter my inbox tasks by Pending only' and shows a list of tasks for 'Normansara'. The first task is: 'Saturday, November 12, 2016 2:01 PM' with 'Submission No 006673', 'Task 1st Level Evaluation', 'Subject Request evaluation for quotation', and 'Time allocated 2 day(s)'. A toolbar at the top includes icons for USA flag, envelope, file, list, user, and power.

2. Top Right Menu

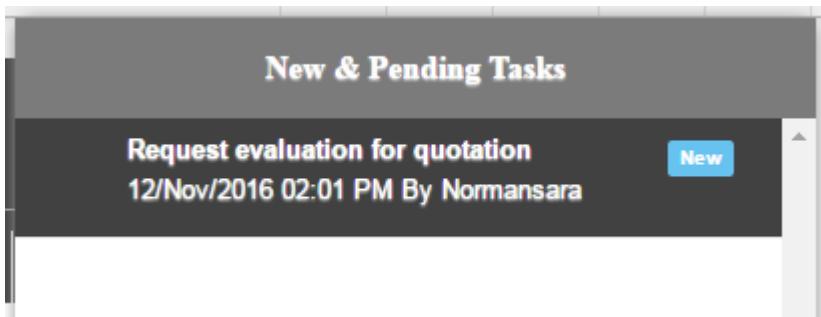


On the **Top Right Menu** function as below;



a. - **New & Pending Task;**

List of new and pending quotation or tasks that need to take action by the user.



An overlay window titled 'New & Pending Tasks' showing a single item: 'Request evaluation for quotation' submitted '12/Nov/2016 02:01 PM By Normansara' with a 'New' button.

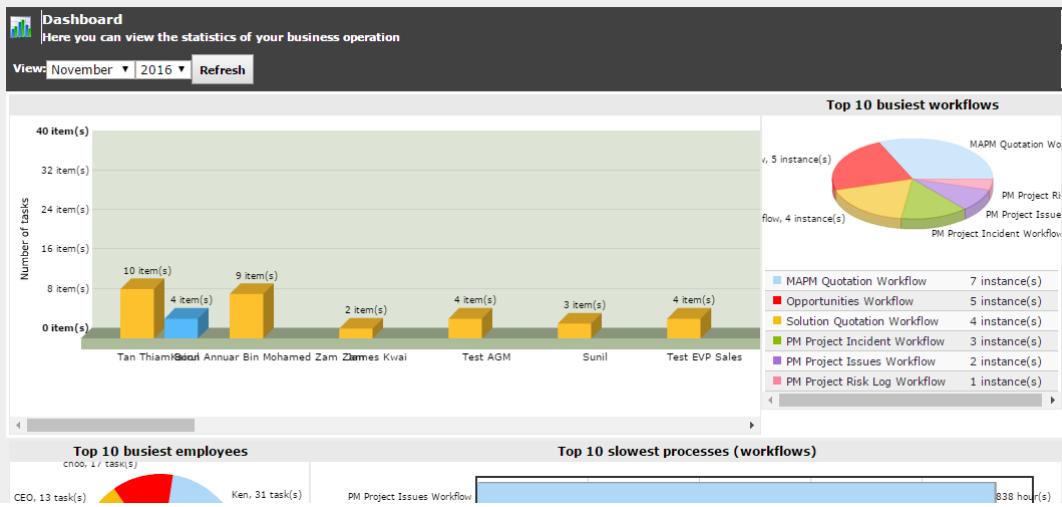
b. - **Submission**

List of quotation that been submit by the user.

Filter my submissions by Pending only ▾				
Date Started	Submission Number	Date Last Updated	Workflow	Status
Saturday, November 12, 2016 2:00 PM	006673	Saturday, November 12, 2016 2:01 PM	MAPM Quotation Workflow	PENDING

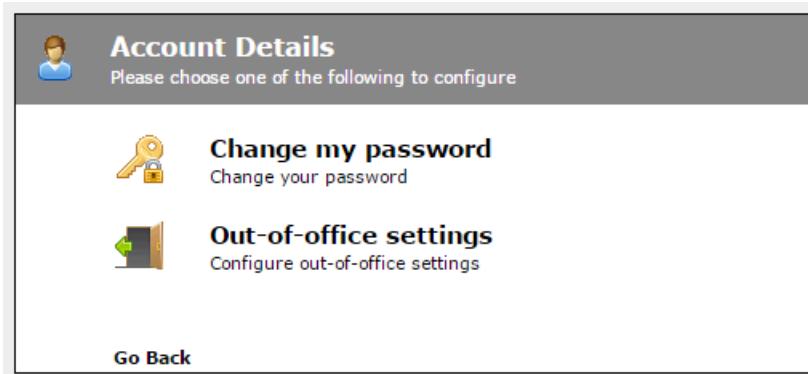
c. - **Dashboard**

This page will display some charts to user.

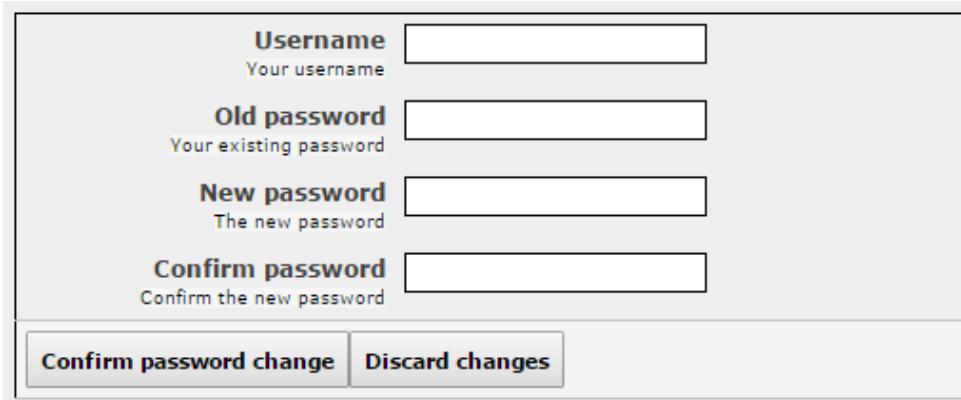


d. - **Account Management**

This is where user can change the password and set notification when he/she out of office.



- Change my password



This is a password change form. It includes fields for "Username" (placeholder: Your username), "Old password" (placeholder: Your existing password), "New password" (placeholder: The new password), and "Confirm password" (placeholder: Confirm the new password). At the bottom are "Confirm password change" and "Discard changes" buttons.

- Out-of-office-setting
 - Click on the **Create a new out-of-office rule** link



This screenshot shows a table for managing out-of-office rules. The columns are: Delete, User, Start date, End date, Reason for being out of office, and Covering officer. A message at the top states "There are currently no records". A "Go Back" link is at the bottom.

- Page as below will be display. Fill in the fields as below;
 - *From*
 - *Until*
 - *Assign for – the user name who is out of the office*
 - *Reason*
 - *Covering officer – the user “Assign for” task will be cover by “Covering Officer”*
 - **Example:** - if the Team Lead is on MC for 2 weeks, the all the task will be assign to Sales Specialist.
 - *From : 05/11/2016 : 8:00AM*
 - *Until : 19/11/2016 : 5:00PM*
 - *Assign for – Team Lead Name (Test Sales Specialist)*

- *Reason – MC for 2 Weeks*
- *Covering Officer – Sales Specialist (Nur Rashida)*
- *Every task that under “Assign for” name will automatically send to “Covering Officer”*
- Click on the **Create now** button at the bottom to save
- Or **Discard changes** to cancel.

From* 14 November 2016 08 ▾ 00 ▾ AM ▾

Until* 16 November 2016 05 ▾ 00 ▾ PM ▾

Assign for* Test Sales Specialist Find a user

Reason for being out-of-office

Covering officer* Nur Rashida Find a user

The person who will be acting on your behalf when you are out-of-office

Create now **Discard changes**

- After save the page as below will be display

Create a new out-of-office rule				
<input type="checkbox"/> Delete	User	Start date	End date	Reason for being out of office
<input type="checkbox"/>	Test Sales Specialist	Monday, November 14, 2016 8:00 AM	Wednesday, November 16, 2016 5:00 PM	Nur Rashida

Go Back

- If you want to delete, **tick on the checkbox** and click on the **Delete** button on the top.

<input type="checkbox"/> Delete	User	Start date	End date
<input checked="" type="checkbox"/>	Test Sales Specialist	Monday, November 14, 2016 8:00 AM	Wednesday, November 16, 2016 5:00 PM

Go Back

- The notification can be seen by user in the workflow details, in the quotation under Submission Information

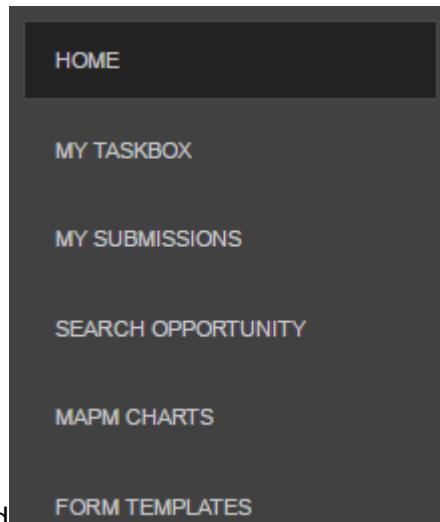
Bubble	Date/time	Description
Start	Monday, November 14, 2016 3:55 PM	Submitted to workflow
SS Insert Product & Price	Monday, November 14, 2016 3:55 PM	No users to send to
Submitter Review Quote before Approval	Monday, November 14, 2016 3:55 PM	Test Sales Specialist out of office, task reassigned to Nur Rashida
Submitter Review Quote before Approval	Monday, November 14, 2016 3:55 PM	Action request sent to Nur Rashida ⌚ Time allocated is 24 hour(s)

e.  - Log out

3. Left Menu

The **Left Menu** will be display based on the user role.

- Assistant General Manager or Sales Specialist Team Lead User



- Solution User



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HOME

MY TASKBOX

MY SUBMISSIONS

ALL CMT

3) Opportunity

User **Assistant General Manager** and **Sales Specialist Team Lead**.

1. From the **Main Page**, the system will display Opportunity List as below;

Filter my inbox tasks by Pending only ▾						
	Received	Submission No	Task	Subject	Time allocated	
<input type="checkbox"/>	15/Mar/2017 12:34 PM	010942	VADS AGM Enterprise	160227-35495 - CP project Janda Baik PHG for 'SAMUDRA ENGINEERS SDN BHD' by AZMAN BIN MUHAMAT NOR (Ent Account Manager Pahang)	5 day(s)	

2. Click on the Opportunity link

15/Mar/2017 010942 12:34 PM	VADS AGM Enterprise	160227-35495 - CP project Janda Baik PHG for 'SAMUDRA ENGINEERS SDN BHD' by AZMAN BIN MUHAMAT NOR (Ent Account Manager Pahang)	5 day(s)
--------------------------------	------------------------	--------------------------------------------------------------------------------------------------------------------------------	----------

3. The system displayed the Opportunity details form in view mode as below;

	Return to Inbox		Edit		Quotation Created		Reassign		Rework item		Seek Input		Post a message		Workflow Status
--	-----------------	--	------	--	-------------------	--	----------	--	-------------	--	------------	--	----------------	--	-----------------

	Opportunities
--	---------------

Opportunity ID	160227-35495
----------------	--------------

* Opportunity Name	CP project Janda Baik PHG
--------------------	---------------------------

Opportunity Owner Name	AZMAN BIN MUHAMAT NOR (Ent Account Manager Pahang)
------------------------	----------------------------------------------------

* Search Account	SAMUDRA ENGINEERS SDN BHD
------------------	---------------------------

Account Name	SAMUDRA ENGINEERS SDN BHD
--------------	---------------------------

Account Category	Enterprise
------------------	------------

* Close Date	01/Nov/2016
--------------	-------------

SalesforceType	New Sales
----------------	-----------

Type	
------	--

Lead Source	
-------------	--

Primary Campaign Source	
-------------------------	--

Stage	Proposal
-------	----------

Probability	25
-------------	----

Action button function

In the **View Mode**, at top of the page there are “**Return to Inbox**”, “**Edit**”, “**Quotation Created**”, “**Reassign**”, “**Rework Item**”, “**Seek Input**”, “**Post a Message**” and “**Workflow Status**” Action button



When the user click on the button **list**, the system will display the “**My Taskbox**”



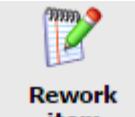
When the user click on the button **list**, the system will display the quotation from view mode to editable mode.



When the user click on the button **list**, the system will complete this Opportunity flow.



When the user click on the button **list**, user can assign other user this opportunity task.



When the user click on the button **list**, user can ask other user to update the opportunity and revert back.



**Seek
Input**

When the user click on the button  , user can ask advice or for further information or advice regarding this quotation from others.



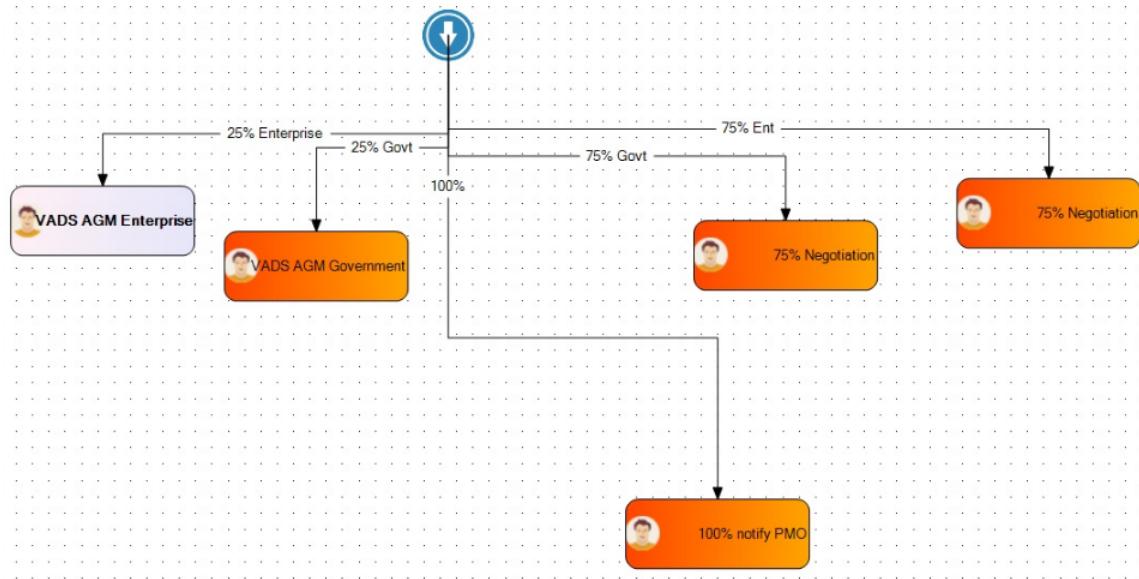
**Post a
message**

When the user click on the button  , the system will post a message on the submission information details.



**Workflow
Status**

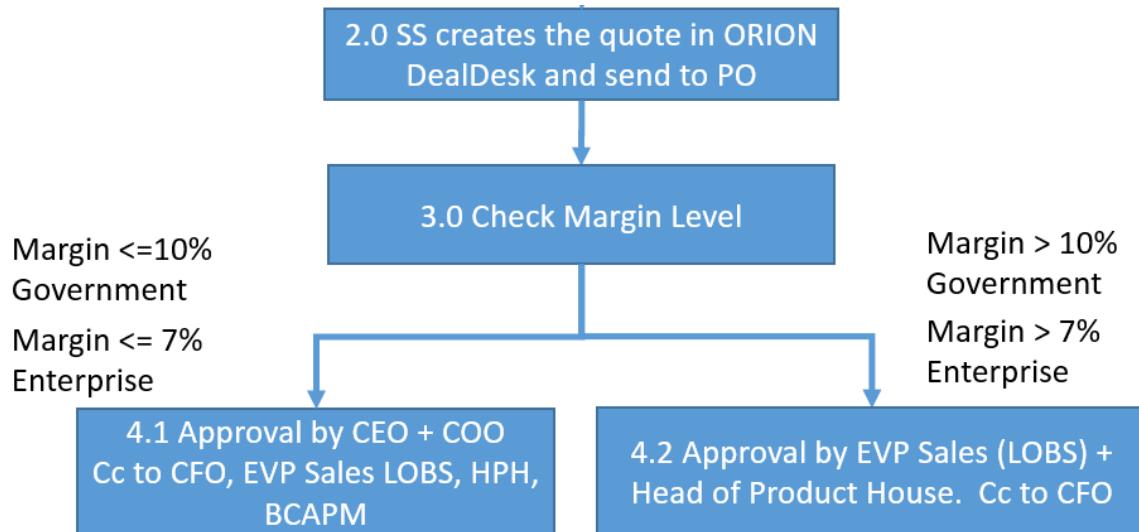
When the user click on the button  , the system show the current status in the workflow.



4) Quotation

- a. Create Quotation by Assistance General Manager or Sales Specialist Team Lead

Quotation Submission Workflow (Solution)



To create the Solution Quotation, go to the bottom of the page and click on the “**Create CMT**” button.



The system will pop-up a confirmation message.

49.236.195.52 says:

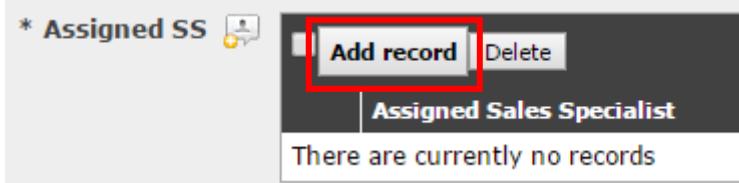
Are you sure you wish to generate a CMT?

OK

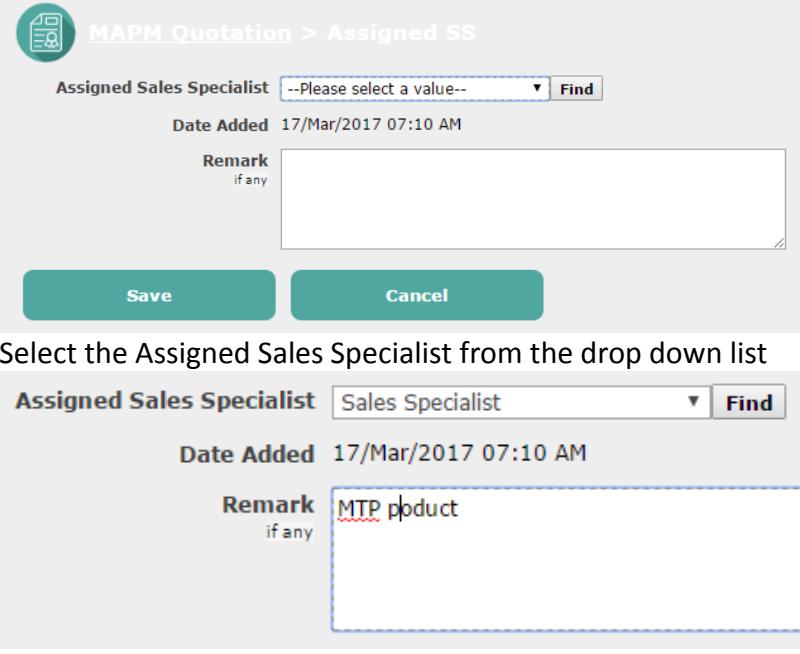
Cancel

When the user click on “OK” button, the system will create **Quotation Link** in the Solution Quotation sub form.

Quotations					
MAPM Pricing Request Form	Click Here To View				
PRF002					
MAPM Quotations					
PRF002	<table><thead><tr><th>Quotation Ref No</th><th>Quotation Status</th></tr></thead><tbody><tr><td>VADS/ICT/150317/130/TAGM</td><td>Pending</td></tr></tbody></table>	Quotation Ref No	Quotation Status	VADS/ICT/150317/130/TAGM	Pending
Quotation Ref No	Quotation Status				
VADS/ICT/150317/130/TAGM	Pending				
Solution CMT					
PRF002	<table><thead><tr><th>Quotation Ref No</th><th>Quotation Status</th></tr></thead><tbody><tr><td>VADS/ICT/180317/138/TAGM</td><td>Draft</td></tr></tbody></table>	Quotation Ref No	Quotation Status	VADS/ICT/180317/138/TAGM	Draft
Quotation Ref No	Quotation Status				
VADS/ICT/180317/138/TAGM	Draft				
DC Productized Quotations					
PRF002	<table><thead><tr><th>Quotation Ref No</th><th>Quotation Status</th></tr></thead><tbody><tr><td>VADS/ICT/180317/136/TAGM</td><td>Approved</td></tr></tbody></table>	Quotation Ref No	Quotation Status	VADS/ICT/180317/136/TAGM	Approved
Quotation Ref No	Quotation Status				
VADS/ICT/180317/136/TAGM	Approved				
DC NonProductized Quotations					
PRF002	<table><thead><tr><th>Quotation Ref No</th><th>Quotation Status</th></tr></thead><tbody><tr><td>VADS/ICT/180317/137/TAGM</td><td>Pending</td></tr></tbody></table>	Quotation Ref No	Quotation Status	VADS/ICT/180317/137/TAGM	Pending
Quotation Ref No	Quotation Status				
VADS/ICT/180317/137/TAGM	Pending				
Click on the DC Productized Quotations link in the Quotation Section. The system open the quotation in new windows.					
Solution CMT					
PRF002	<table><thead><tr><th>Quotation Ref No</th><th>Quotation Status</th></tr></thead><tbody><tr><td>VADS/ICT/180317/138/TAGM</td><td>Draft</td></tr></tbody></table>	Quotation Ref No	Quotation Status	VADS/ICT/180317/138/TAGM	Draft
Quotation Ref No	Quotation Status				
VADS/ICT/180317/138/TAGM	Draft				
Go to Quotation Windows tab , the Solution Quotation form must be in Edit Mode .					

 Solution Quotation	
Quotation Details	
Created by Test AGM	
Date created 18/Mar/2017	
Quotation Ref No	VADS/ICT/180317/138/TAGM
Quotation Date	18 March 2017
Quotation Status	Draft
Quotation Expiry	14
Number of days to expire	
* Assigned SS	 Add record Delete Assigned SS There are currently no records
Customer Profile Introduction	
Opportunity ID  <input type="text"/> Check	
Opportunity Name  UPGRADE DOME 10mbps	
* Company Name	 SPECIFIC RESOURCES SDN BHD
Customer Category	 Enterprise
Company No	 PS/0244982-K
Address	
City	
Postcode	
State	
Country	 Malaysia
User need to make sure the following information fill-in	
<ul style="list-style-type: none">• Quotation details section<ul style="list-style-type: none">• Assigned Sales Specialist	
 * Assigned SS   Delete Assigned Sales Specialist There are currently no records	
<ul style="list-style-type: none">○ To add Sales Specialist click on the "Add Record" button○ The system will display Assigned SS form as below	

Assigned SS

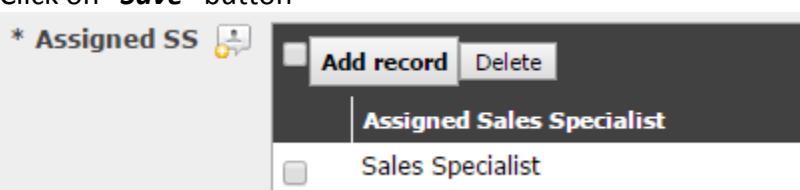
 MAPM Quotation > Assigned SS

Assigned Sales Specialist

Date Added 17/Mar/2017 07:10 AM

Remark if any

- Select the Assigned Sales Specialist from the drop down list
- Click on “Save” button

 * Assigned SS
Assigned Sales Specialist
Sales Specialist

- Introduction section



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Customer Profile | Introduction

Project Name UPGRADE DOME 10mbps

Salesforce Reference No 151002-28113

Type of Paper --Please select a value--

Purchase Method --Please select a value--

Location Klang Valley
 West Malaysia
 East Malaysia

PO / LOA - Customer Choose File No file chosen Upload

PO / LOA - Telekom Malaysia Choose File No file chosen Upload

Objective

Background

* Contract Period --Please select a value-- Find

Internal support breakdown Inclusive Yearly

Project Duration (Months)

Duration of warranty (Months)

Project (Business) Start date 12 00 AM

Project (Business) End Date 12 00 AM

Submission Date

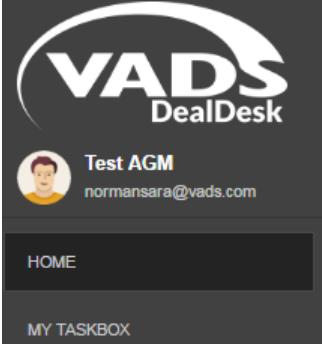
* General Term & Conditions
1. All prices quoted are in Ringgit Malaysia unless specified.
2. Price quoted based on 36 months contract
3. Quotation validity for 30 days from the above date
4. No cancellation is allowed upon confirmation
5. Price quoted EXCLUDES (unless specify) all operating systems & application license
6. Public Cloud Backup services INCLUDES (unless specify) 99.5% of Service Level Guarantee
Backup System availability
7. Delivery within 8- 12 weeks upon official confirmation

* RFQ/RFP/ TENDER SCOPE OF WORK
s n s

Solution Attachment
 Add record Delete

Created By	Attachment	Description	Date Created
There are currently no records			

❖ AFTER EVERY CHANGES PLEASE SAVE THE QUOTATION

	<p>At the bottom of this editable mode form, user can see button as below;</p> <div style="background-color: #e0f2e0; padding: 10px; text-align: center;">SaveSave and submitDiscard changes</div> <p>Save</p> <ul style="list-style-type: none">- Click on the “Save” button the system display “My Taskbox” List as below <div style="display: flex; align-items: flex-start;"><div style="flex: 1; text-align: center; padding-right: 20px;"><p>Test AGM normansara@vads.com</p><p>HOME</p><p>MY TASKBOX</p></div><div style="flex: 2; background-color: #f0f0f0; padding: 10px; border: 1px solid #ccc; border-radius: 5px;"><p>Filter my inbox tasks by Pending only ▾</p><table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th style="text-align: left; padding: 5px;">Delete</th><th style="text-align: center; padding: 5px;">Received</th><th style="text-align: center; padding: 5px;">Submission No</th><th style="text-align: center; padding: 5px;">Task</th><th style="text-align: center; padding: 5px;">Subject</th></tr></thead><tbody><tr><td style="text-align: center; padding: 5px;"><input type="checkbox"/></td><td style="text-align: center; padding: 5px;">18/Mar/2017 06:54 AM</td><td style="text-align: center; padding: 5px;">010963</td><td style="text-align: center; padding: 5px;">Submitter Review Quote before Approval</td><td style="text-align: center; padding: 5px;">UPGRADE DC RESOURCES</td></tr><tr><td style="text-align: center; padding: 5px;"><input type="checkbox"/></td><td style="text-align: center; padding: 5px;">16/Mar/2017 09:33 PM</td><td style="text-align: center; padding: 5px;">010952</td><td style="text-align: center; padding: 5px;">VADS AGM Enterprise</td><td style="text-align: center; padding: 5px;">160117-334 PPBGROUP_I 'PPB GROUP PPIMC / PPFA A'</td></tr></tbody></table></div></div> <p>Save and submit</p> <ul style="list-style-type: none">- the system will ask for confirmation <div style="background-color: #e0f2e0; padding: 10px; text-align: center;"><p>Important note (if any)</p><div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div><div style="display: flex; justify-content: space-around; width: 100%;">ConfirmCancelCheck last flow</div></div> <ul style="list-style-type: none">- after click on the “Confirm” button, the system submit the quotation to workflow process and display the submission ID.	Delete	Received	Submission No	Task	Subject	<input type="checkbox"/>	18/Mar/2017 06:54 AM	010963	Submitter Review Quote before Approval	UPGRADE DC RESOURCES	<input type="checkbox"/>	16/Mar/2017 09:33 PM	010952	VADS AGM Enterprise	160117-334 PPBGROUP_I 'PPB GROUP PPIMC / PPFA A'
Delete	Received	Submission No	Task	Subject												
<input type="checkbox"/>	18/Mar/2017 06:54 AM	010963	Submitter Review Quote before Approval	UPGRADE DC RESOURCES												
<input type="checkbox"/>	16/Mar/2017 09:33 PM	010952	VADS AGM Enterprise	160117-334 PPBGROUP_I 'PPB GROUP PPIMC / PPFA A'												

Solution Quotation

**Thank you. Your submission ID is 010966**

Thank you for your submission. Please choose one of the following actions below:

- [Key in a new entry](#)
- [View the submitted entry](#)
- [View the status of the submitted entry](#)
- [Return to the default view](#)

To view the *Quotation workflow status*, user can click on the “***View the submitted entry***” or “***View the status of the submitted entry***”

At the submission section, user can view quotation workflow status as below;

Submission information			
The following is information related to this particular submission			
Submission No.	010964		
Submitted By	Test AGM		
Date Started	18/Mar/2017 10:05 AM		
History	Bubble	Date/time	
	 Start	18/Mar/2017 10:05 AM	Submitted to workflow
	 SS Insert Product & Price	18/Mar/2017 10:05 AM	Action request sent to Sales Specialist  Time allocated is 3 day(s)

Discard changes

- Click on the “***Discard changes***” button, the system will display ***Quotation Details View Form***.



Solution Quotation

Quotation Details

Created by Test AGM

Date created 18/Mar/2017

Quotation Ref No VADS/ICT/180317/138/TAGM

Quotation Date 18/Mar/2017

Quotation Status Draft

Quotation Expiry 14

Number of days to expire

* Assigned SS

Assigned SS

Sales Specialist

Customer Profile | Introduction

Project Name UPGRADE DOME 10mbps

Salesforce Reference No 151002-28113

Type of Paper

- And at the bottom of this **view mode form**, user can see button as below;

Save and submit

Cancel

- Save and submit** - the system save the data and submit the quotation to workflow process

- Cancel** - the system display “My Taxkbox” list

VADS DealDesk

Test AGM
normansara@vads.com

HOME

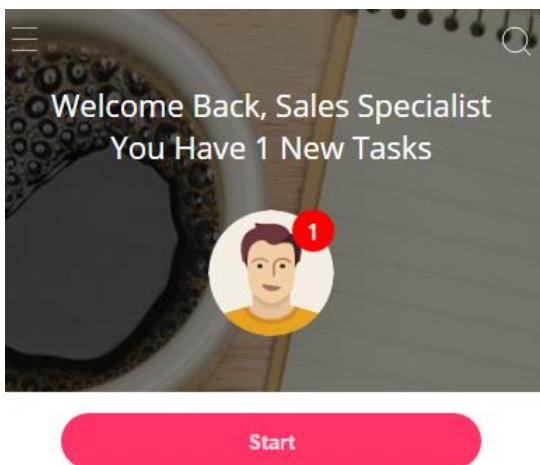
MY TASKBOX

Filter my inbox tasks by Pending only ▾					
<input type="checkbox"/> Delete	Received	Submission No	Task	Subject	Due Date
<input type="checkbox"/>	18/Mar/2017 06:54 AM	010963	Submitter Review	UPGRADE DOME 10mbps	
<input type="checkbox"/>	16/Mar/2017 09:33 PM	010952	VADS AGM Enterprise	160117 PPBGR01 'PPB GRADING /	

b. Update Quotation

i. Fill-in the product and price by Sales Specialist

On welcome page, the user can see the notification as below;

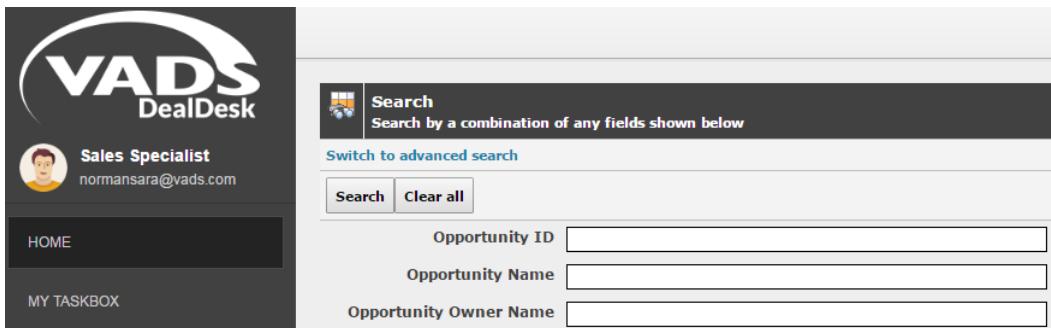


Your action is needed on submission 010966
18/Mar/2017 06:08 PM By Test AGM

Start

If the user click on the **Start** button.

The system will display home page as below;



To go to the list of the task, the user need to click on the **MY TASKBOX** on the left hand-side menu.

The system will display “My Taskbox” list

The screenshot shows the VADS DealDesk inbox interface. On the left is a sidebar with the VADS logo, user information (Sales Specialist, normansara@vads.com), and a 'HOME' button. The main area is a table titled 'Filter my inbox tasks by Pending only'. A single row is visible, highlighted with a red box. The columns are 'Received' (18/Mar/2017 06:08 PM), 'Submission No' (010966), 'Task' ('SS Insert Product & Price'), 'Subject' ('Your action is needed on submission 010966'), and 'Time allocated' (3 day(s)). Below the table, there is some small, illegible text.

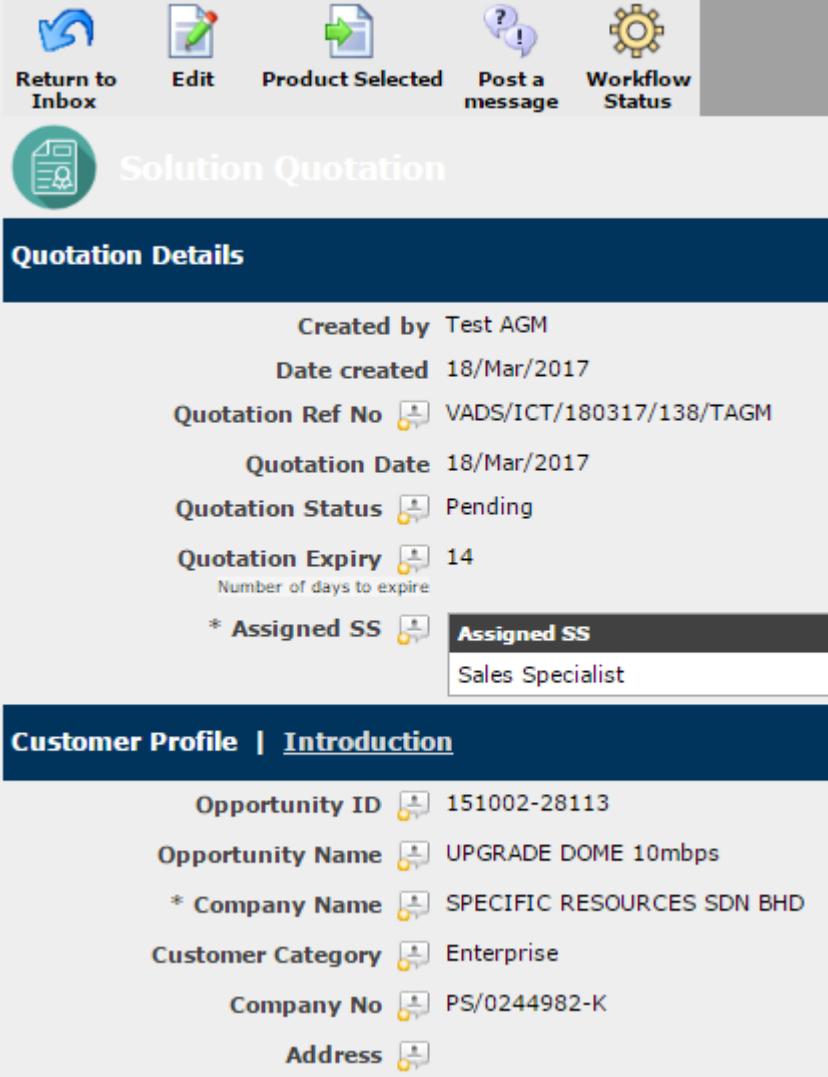
Click on the Quotation Link which is the “**SS Insert Product & Price**” task name.

18/Mar/2017 010966 **SS Insert Product & Price** **Your action is needed on submission 010966**

The system will display the Quotation Details Form in View Mode as below;

The screenshot shows the Quotation Details form in View mode. At the top, there are five buttons: 'Return to Inbox', 'Edit', 'Product Selected', 'Post a message', and 'Workflow Status'. Below this is a section titled 'Solution Quotation' with a green icon. The main content area has a dark blue header 'Quotation Details'. Inside, there are several data entries:

- Created by: Test AGM
- Date created: 18/Mar/2017
- Quotation Ref No: VADS/ICT/180317/138/TAGM
- Quotation Date: 18/Mar/2017
- Quotation Status: Pending
- Quotation Expiry: 14 (Number of days to expire)
- * Assigned SS: Sales Specialist (highlighted in a red box)
- Customer Profile | Introduction:
 - Opportunity ID: 151002-28113
 - Opportunity Name: UPGRADE DOME 10mbps
 - * Company Name: SPECIFIC RESOURCES SDN BHD
 - Customer Category: Enterprise
 - Company No: PS/0244982-K
 - Address: (empty field)

	<p>If the user click on the notification link;</p> <p> Your action is needed on submission 010966 18/Mar/2017 06:08 PM By Test AGM</p> <p>The system will display the Quotation Details Form in View Mode as below;</p> 
	Action button function

In the **View Mode**, at top of the page there are “**Return to Inbox**”, “**Edit**”, “**Product Selected**”, “**Post a Message**” and “**Workflow Status**” Action button



When the user click on the button  , the system will display the “**My Taskbox**” list.



When the user click on the button  , the system will display the quotation from view mode to editable mode.



When the user click on the button  , the system will proceed to next workflow process which is Submitter review this quotation.

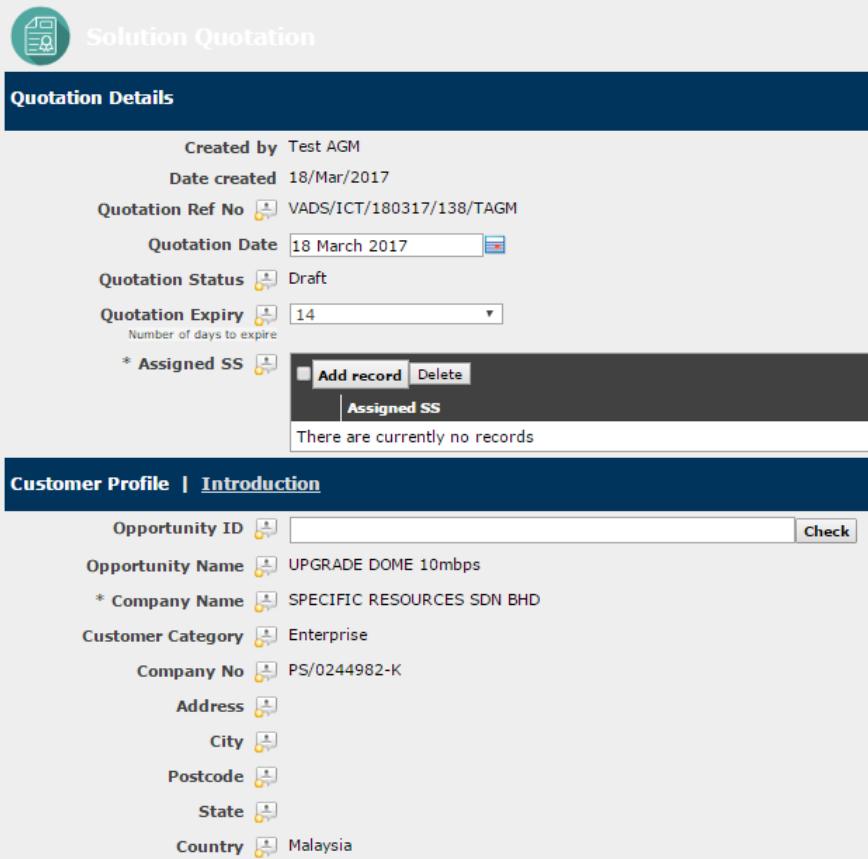


When the user click on the button  , the system will post a message on the submission information details.



When the user click on the button  , the system show the current status in the quotation workflow as below;

	<pre> graph TD A[Set Pending] --> B[SS Insert Product & Price] B -- Rej --> C[VADS PM Presales] B --> D[Evaluation] C -- Approved --> D D -- rej --> E[Quotation Rejected] D -- Appv --> F[Quotation Approved] C --> G([Submitter]) G --> D </pre>
	<p>Create/Update the Product information</p> <p>To <i>create or update the product and price</i> click on the “<i>Edit</i>” action button.</p> <p><i>MAPM Quotation</i> form must be in <i>Edit Mode</i>.</p> <p>In the <i>MAPM Quotation</i> form, under <i>Quotation Details</i> section.</p>

	 <p>The screenshot shows the 'Solution Quotation' form. At the top, there's a 'Quotation Details' section with fields for 'Created by' (Test AGM), 'Date created' (18/Mar/2017), 'Quotation Ref No' (VADS/ICT/180317/138/TAGM), 'Quotation Date' (18 March 2017), 'Quotation Status' (Draft), 'Quotation Expiry' (14 days), and an 'Assigned SS' section with an 'Add record' button. Below this is a 'Customer Profile Introduction' section with fields for 'Opportunity ID', 'Opportunity Name' (UPGRADE DOME 10mbps), 'Company Name' (SPECIFIC RESOURCES SDN BHD), 'Customer Category' (Enterprise), 'Company No' (PS/0244982-K), 'Address', 'City', 'Postcode', 'State', and 'Country' (Malaysia).</p>	
--	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

a. Create Line items

	<p>To add line items Solution Quotation form must be in Edit Mode.</p>
	<p>Hardware</p>  <p>The screenshot shows the 'Hardware' line item form. It has an 'Add record' button and columns for 'Category', 'Product', 'Selected Vendor / Distributor', and 'Me'. A message at the bottom says 'There are currently no records'.</p> <ul style="list-style-type: none">• To add Hardware line items click on the "Add record" button• System will display hardware form as below



Solution Quotation > Hardware

Created by Sales Specialist

* Product Category

Type Expenditure CAPEX OPEX

Calculate by Margin Price

Principal Type Inclusive Yearly

No

Product

Description

Selected Vendor / Distributor
Based on lowest cost

Method Of Procurement

Quantity

Unit Cost

Margin %

Unit Sale Price 0.00

Remark

- If calculate by Margin

Calculate by Margin Price

Margin %

Unit Sale Price 9,600.00

- If calculate by Price

Calculate by Margin Price

Margin % 20

Unit Sale Price

- If principle type by Inclusive

Principal Type Inclusive Yearly

	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="background-color: #003366; color: white; text-align: left;">Annual Cost Annual Price Selling</th> </tr> </thead> <tbody> <tr> <td style="width: 15%;">Year 0</td><td>16,000.00</td></tr> <tr> <td>Year 1</td><td>0.00</td></tr> <tr> <td>Year 2</td><td>0.00</td></tr> <tr> <td>Year 3</td><td>0.00</td></tr> <tr> <td>Year 4</td><td>0.00</td></tr> <tr> <td>Year 5</td><td>0.00</td></tr> </tbody> </table> <ul style="list-style-type: none"> ○ If principle type by Yearly <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="background-color: #003366; color: white; text-align: left;">Principal Type <input checked="" type="radio"/> Inclusive <input type="radio"/> Yearly</th> </tr> </thead> <tbody> <tr> <td style="width: 15%;">Year 0</td><td>16,000.00</td></tr> <tr> <td>Year 1</td><td>0.00</td></tr> <tr> <td>Year 2</td><td>0.00</td></tr> <tr> <td>Year 3</td><td>0.00</td></tr> <tr> <td>Year 4</td><td>0.00</td></tr> <tr> <td>Year 5</td><td>0.00</td></tr> </tbody> </table> <p style="margin-left: 20px;">At the bottom of the form, there “Save” and “Cancel” button</p> <div style="text-align: center; margin-top: 10px;"> Save Cancel </div> <ul style="list-style-type: none"> ○ “Cancel” – system will discard the changes ○ “Save” – system will display Hardware line item in <i>Solution Quotation</i> as below; <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="6" style="background-color: #003366; color: white; text-align: left;">Hardware Licenses Managed or Maintenance Cisco External Support Internal Expenses Customer</th> </tr> </thead> <tbody> <tr> <td style="width: 15%;">Hardware</td> <td style="width: 15%; text-align: center;"> </td> <td style="width: 15%; text-align: center;"> <input type="checkbox"/> Add record <input type="button" value="Delete"/> </td> <td style="width: 15%; text-align: center;"> <input type="checkbox"/> Category <input type="checkbox"/> Product <input type="checkbox"/> Selected Vendor / Distributor <input type="checkbox"/> Method </td> <td style="width: 15%; text-align: center;"> <input type="checkbox"/> Total Sale Price </td> <td style="width: 15%; text-align: center;"> <input type="checkbox"/> Dell <input type="checkbox"/> Server <input type="checkbox"/> DELL <input type="checkbox"/> Direct Award <input type="checkbox"/> 19,200.00 </td> </tr> </tbody> </table>	Annual Cost Annual Price Selling		Year 0	16,000.00	Year 1	0.00	Year 2	0.00	Year 3	0.00	Year 4	0.00	Year 5	0.00	Principal Type <input checked="" type="radio"/> Inclusive <input type="radio"/> Yearly		Year 0	16,000.00	Year 1	0.00	Year 2	0.00	Year 3	0.00	Year 4	0.00	Year 5	0.00	Hardware Licenses Managed or Maintenance Cisco External Support Internal Expenses Customer						Hardware		<input type="checkbox"/> Add record <input type="button" value="Delete"/>	<input type="checkbox"/> Category <input type="checkbox"/> Product <input type="checkbox"/> Selected Vendor / Distributor <input type="checkbox"/> Method	<input type="checkbox"/> Total Sale Price	<input type="checkbox"/> Dell <input type="checkbox"/> Server <input type="checkbox"/> DELL <input type="checkbox"/> Direct Award <input type="checkbox"/> 19,200.00
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	<p>Licenses</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="6" style="background-color: #003366; color: white; text-align: left;">Licenses</th> </tr> </thead> <tbody> <tr> <td style="width: 15%; text-align: center;"> <input type="checkbox"/> Add record <input type="button" value="Delete"/> </td> <td style="width: 15%; text-align: center;"> <input type="checkbox"/> Category <input type="checkbox"/> License Part No <input type="checkbox"/> Manufacturer <input type="checkbox"/> Vendor / Distributor <input type="checkbox"/> Q </td> <td colspan="4" style="text-align: center;"> There are currently no records </td> </tr> </tbody> </table> <ul style="list-style-type: none"> ● To add Licenses line items click on the “Add record” button ● System will display licenses form as below 	Licenses						<input type="checkbox"/> Add record <input type="button" value="Delete"/>	<input type="checkbox"/> Category <input type="checkbox"/> License Part No <input type="checkbox"/> Manufacturer <input type="checkbox"/> Vendor / Distributor <input type="checkbox"/> Q	There are currently no records																															
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Solution Quotation > Licenses

Created by Sales Specialist

Product Category

Type Expenditure CAPEX OPEX

Principal Type Inclusive Yearly

No

License Part No

Manufacturer

Vendor / Distributor

Method Of Procurement

Description

Quantity

Unit Cost

Margin %

At the bottom of the form, there “Save” and “Cancel” button

Save

Cancel

- “Cancel” – system will discard the changes
- “Save” – system will display Hardware line item in *Solution Quotation* as below;

[Licenses](#) | [Managed or Maintenance](#) | [Cisco](#) | [External Support](#) | [Internal Expenses](#) | [Complaints](#)
| [Billing Information to Customer](#)

Licenses 

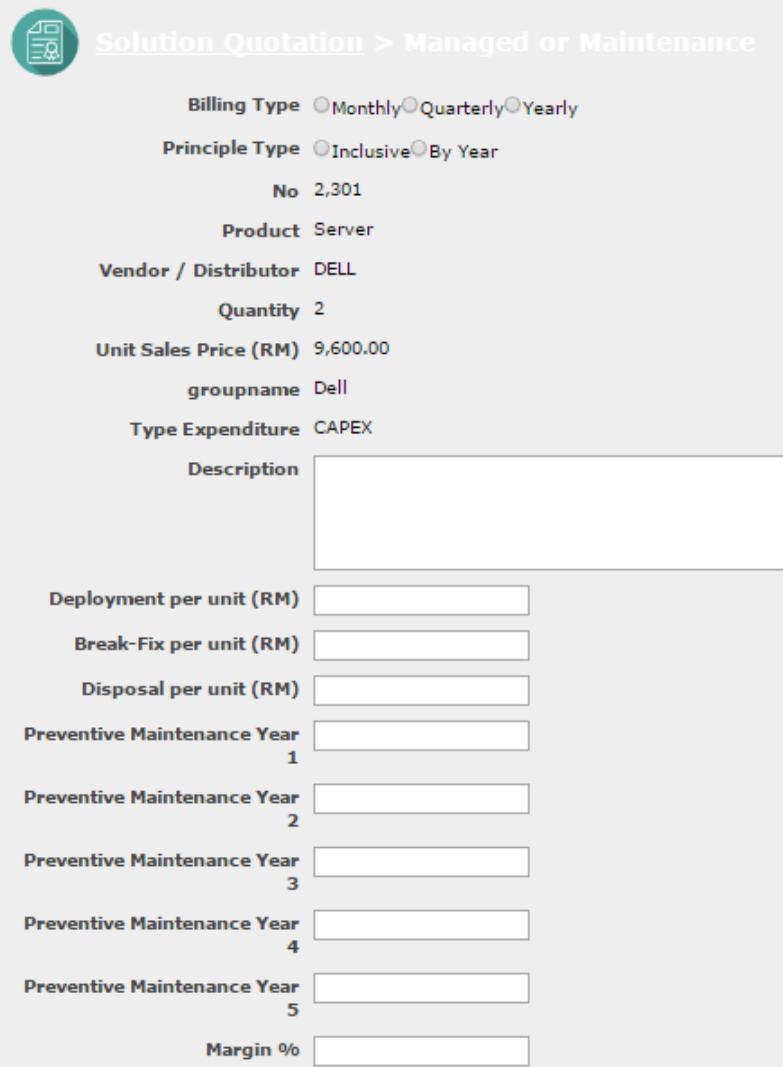
Add record

Category	License Part No	Manufacturer	Vendor / Distributor	Quantity	Unit Sale Price
SIS	xxxxx2301	Symantec	Symantec	2	3,250.00

Licenses

Managed or Maintenance				
	Add record	Delete		
	Billing Type	Product	Quantity	Unit Sales Price (RM)
		Server	2	9,600.00 D

- To add Licenses line items click on the “Add record” button
- System will display licenses form as below



Solution Quotation > Managed or Maintenance

Billing Type Monthly Quarterly Yearly

Principle Type Inclusive By Year

No 2,301

Product Server

Vendor / Distributor DELL

Quantity 2

Unit Sales Price (RM) 9,600.00

groupname Dell

Type Expenditure CAPEX

Description

Deployment per unit (RM)

Break-Fix per unit (RM)

Disposal per unit (RM)

Preventive Maintenance Year 1

Preventive Maintenance Year 2

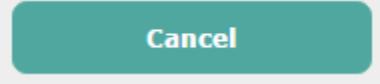
Preventive Maintenance Year 3

Preventive Maintenance Year 4

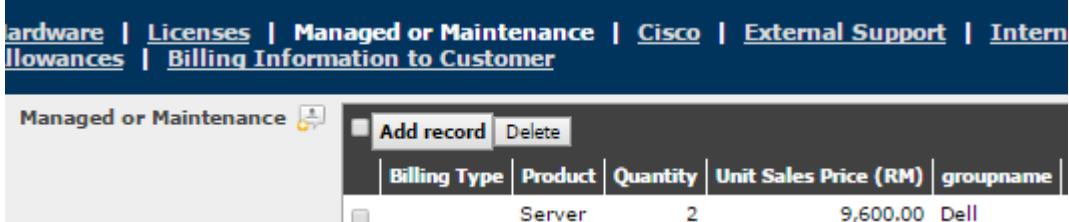
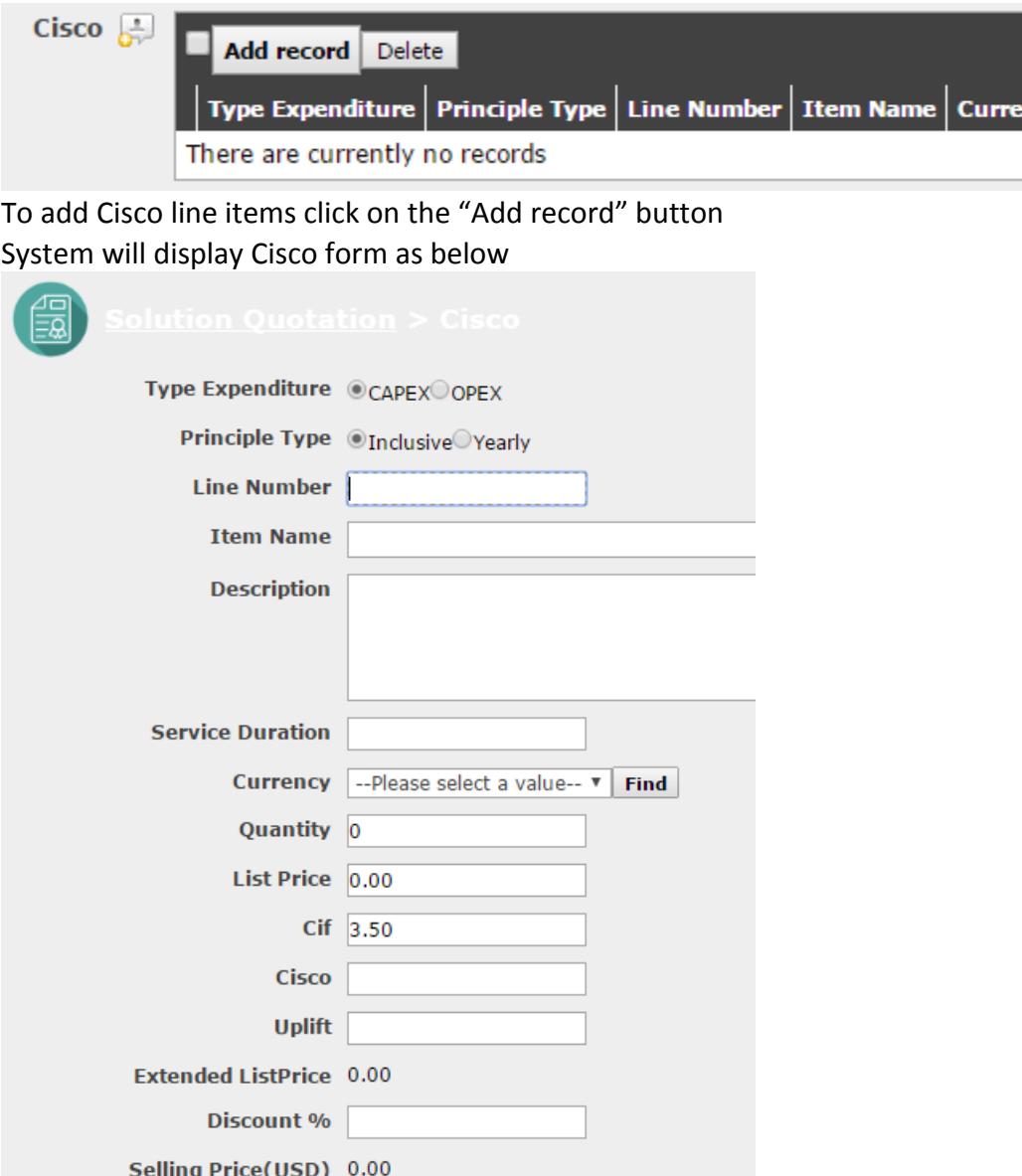
Preventive Maintenance Year 5

Margin %

At the bottom of the form, there “Save” and “Cancel” button

**Save****Cancel**

- “Cancel” – system will discard the changes

	<ul style="list-style-type: none"> ○ “Save” – system will display Hardware line item in <i>Solution Quotation</i> as below; 
	<p><i>Cisco</i></p>  <ul style="list-style-type: none"> • To add Cisco line items click on the “Add record” button • System will display Cisco form as below

	<p>At the bottom of the form, there “Save” and “Cancel” button</p> <div style="text-align: center;"> Save Cancel </div> <ul style="list-style-type: none"> ○ “Cancel” – system will discard the changes ○ “Save” – system will display Hardware line item in <i>Solution Quotation</i> as below;
	<p><i>External Support (Professional Service)</i></p> <ul style="list-style-type: none"> • To add External Support (Professional Service) line items click on the “Add record” button • System will display External Support form as below <p>At the bottom of the form, there “Save” and “Cancel” button</p> <div style="text-align: center;"> Save Cancel </div> <ul style="list-style-type: none"> ○ “Cancel” – system will discard the changes

- “Save” – system will display Hardware line item in *Solution Quotation* as below;

	<p style="margin: 0;">[Navigation Links] Licenses Managed or Maintenance Cisco External Support Internal Expenses Billing Information to Customer</p> <p style="margin: 0;">[Professional Service] Add record Delete</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Principal Type</th> <th style="width: 20%;">Type Expenditure</th> <th style="width: 20%;">Vendor Name</th> <th style="width: 15%;">Total Cost</th> <th style="width: 25%;">Price To Customer</th> </tr> </thead> <tbody> <tr> <td>Inclusive</td> <td>OPEX</td> <td>Compuware</td> <td>250,000.00</td> <td>450,000.00</td> </tr> </tbody> </table>	Principal Type	Type Expenditure	Vendor Name	Total Cost	Price To Customer	Inclusive	OPEX	Compuware	250,000.00	450,000.00
Principal Type	Type Expenditure	Vendor Name	Total Cost	Price To Customer							
Inclusive	OPEX	Compuware	250,000.00	450,000.00							

Internal Expenses

	<p style="margin: 0;">[Internal Expenses] Add record Delete</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Type Expenditure</th> <th style="width: 15%;">No</th> <th style="width: 15%;">Item</th> <th style="width: 15%;">Details</th> <th style="width: 15%;">Amount</th> </tr> </thead> <tbody> <tr> <td colspan="5" style="text-align: center;">There are currently no records</td> </tr> </tbody> </table> <p style="margin: 0;">Total Expenses 0.00</p> <p style="margin: 0;">Margin % <input type="text"/></p> <p style="margin: 0;">Total Price Sales 0.00</p> <p style="margin: 0;">Financial Provision Add record Delete</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Risk</th> <th style="width: 25%;">Minimum Sales Price</th> <th style="width: 15%;">Amount</th> <th style="width: 45%;">Offer Price To</th> </tr> </thead> <tbody> <tr> <td colspan="4" style="text-align: center;">There are currently no records</td> </tr> </tbody> </table>	Type Expenditure	No	Item	Details	Amount	There are currently no records					Risk	Minimum Sales Price	Amount	Offer Price To	There are currently no records			
Type Expenditure	No	Item	Details	Amount															
There are currently no records																			
Risk	Minimum Sales Price	Amount	Offer Price To																
There are currently no records																			

- To add Internal Expenses line items click on the “Add record” button
- System will display Internal Expenses and financial provision form as below



Solution Quotation > Internal Expenses

No

Item Stationaries (papers, toner)

Amount

 **Solution Quotation > Financial Provision**

Risk

Details

% Contract Price

Max Liability / Max Exposure

% Provision

Provision Amount

Summary Provision

Minimum Sales Price Amount

Offer Price To Customer Amount

At the bottom of the form, there “Save” and “Cancel” button

**Save****Cancel**

- “Cancel” – system will discard the changes
- “Save” – system will display Hardware line item in *Solution Quotation*

Contingency Allowances

Contingency Allowances 

Principle Type	Risk Description	Impact on (
There are currently no records		

- To add Contingency Allowances line items click on the “Add record” button
- System will display Contingency Allowances and financial provision form as below

Solution Quotation > Contingency Allowances

Type Expenditure CAPEX OPEX

Principle Type Inclusive

Risk Description

Contingency Plan

No

Likelihood of risk happening
(Please insert estimated %
percentage)

Impact severity (Please
select either Low, Medium,
High) --Please select a value-- ▾

Impact on (Expenses,
Labour, Material) --Please select a value-- ▾

Gross Impact on Costs

Contingency Allowance 0.00

Annual Selling Price

Year 1 0.00

At the bottom of the form, there “Save” and “Cancel” button

Save

Cancel

- “Cancel” – system will discard the changes
- “Save” – system will display Hardware line item in *Solution Quotation*

Billing Information to Customer

Contingency Allowances

<input type="checkbox"/> Add record	Delete	
Principle Type	Risk Description	Impact on (
There are currently no records		

- To add Contingency Allowances line items click on the “Add record” button
- System will display Contingency Allowances and financial provision form as below

 **Solution Quotation > Contingency Allowances**

Type Expenditure CAPEX OPEX

Principle Type Inclusive

Risk Description

Contingency Plan

No

Likelihood of risk happening
(Please insert estimated %
percentage)

Impact severity (Please
select either Low, Medium,
High)

Impact on (Expenses,
Labour, Material)

Gross Impact on Costs

Contingency Allowance 0.00

Annual Selling Price

Year 1 0.00

At the bottom of the form, there “Save” and “Cancel” button

 Save Cancel

- “Cancel” – system will discard the changes
- “Save” – system will display Hardware line item in *Solution Quotation*

b. Update Line items

Solution Quotation form must be in ***Edit Mode***.

In the ***Solution Quotation*** form, under ***Quotation Details*** section.

Click on the ***Line Items***.

[Licenses](#) | [Managed or Maintenance](#) | [Cisco](#) | [External Support](#) | [Internal Expense](#)
[Billing Information to Customer](#)

Licenses		Add record	Delete	Category	License Part No	Manufacturer	Vendor / Distributor	Quantity	Unit S
SIS	xxxxx2301	Symantec	Symantec					2	3

The system will display Line Items in Edit Mode form as below

 **Solution Quotation > Licenses**

Created by Sales Specialist

Product Category --Please select a value--

Type Expenditure CAPEX OPEX

Principal Type Inclusive Yearly

No

License Part No

Manufacturer

Vendor / Distributor

Method Of Procurement --Please select a value--

Description

Quantity

Unit Cost

Margin %

User can change the information.

To save the line items, click "Save" at the bottom of the page

❖ AFTER EVERY CHANGES PLEASE SAVE THE QUOTATION

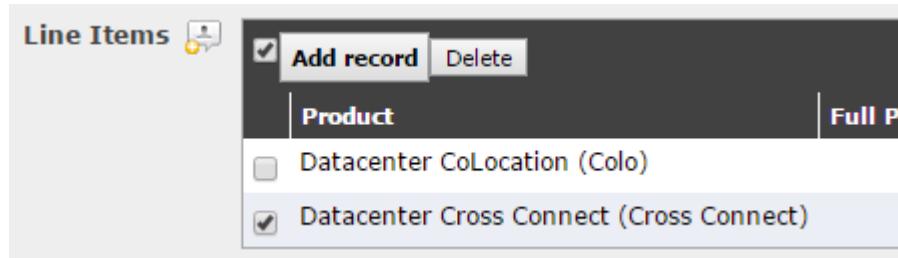
c. Delete Line items

Solution Quotation form must be in **Edit Mode**.

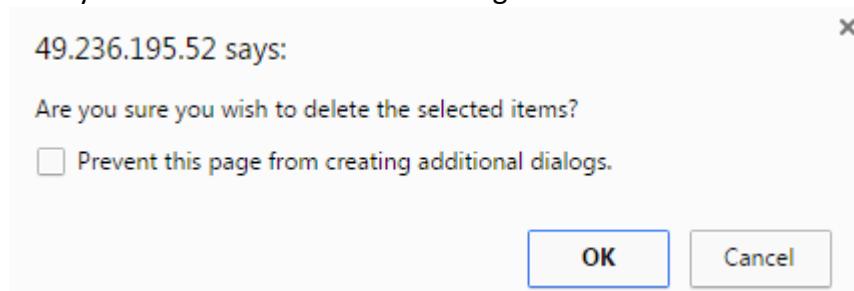
In the **Solution Quotation** form, under **Quotation Details** section.

1. Delete Line Item

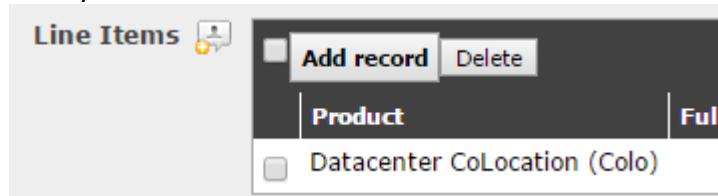
- Click on the checkbox on the selected line item



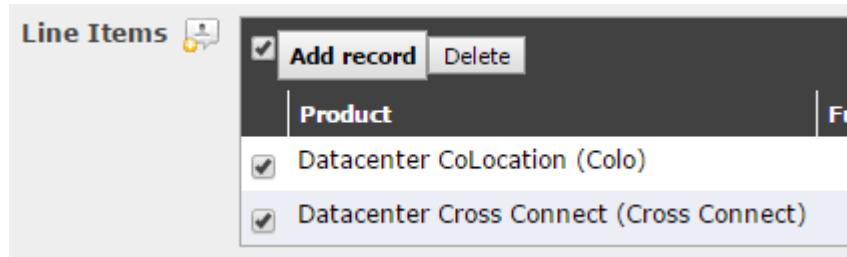
- Click on the Delete Button
- The system alert the user with message as below



- The system will delete selected row

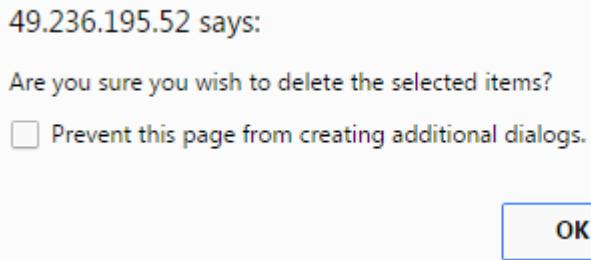
**2. Delete All**

- Click on the checkbox next to Add Record button

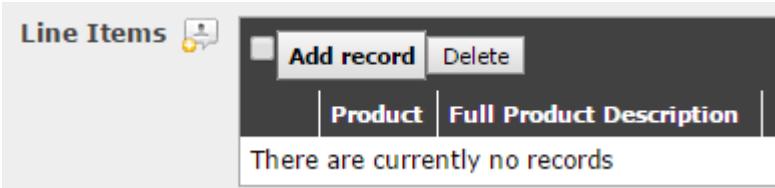


- Click on the Delete Button

- c. The system alert the user with message as below



- d. The system will delete all row



❖ **AFTER EVERY CHANGES PLEASE REMEMBER TO SAVE THE QUOTATION**

At the bottom of this **editable mode form**, user can see button as below;

Save

Save and submit

Discard changes

Save

- Click on the “**Save**” button the system display message the entry is saved as below;

DC Productized Quotation

Your entry is saved.

Thank you for your submission. Please choose one of the following actions below:

Key in a new entry
View the submitted entry
Return to the default view

Save and submit

- the system will ask for confirmation

Important note (if any)

Confirm

Cancel

Check last flow

- after click on the “**Confirm**” button, the system submit the quotation to workflow process and display the submission ID.

MAPM Quotation



Thank you. Your submission ID is 010957

Thank you for your submission. Please choose one of the following actions below:

- Key in a new entry
- View the submitted entry
- View the status of the submitted entry
- Return to the default view

To view the *Quotation workflow status*, user can click on the “***View the submitted entry***” or “***View the status of the submitted entry***”

At the submission section, user can view quotation workflow status as below;

Submission information

The following is information related to this particular submission

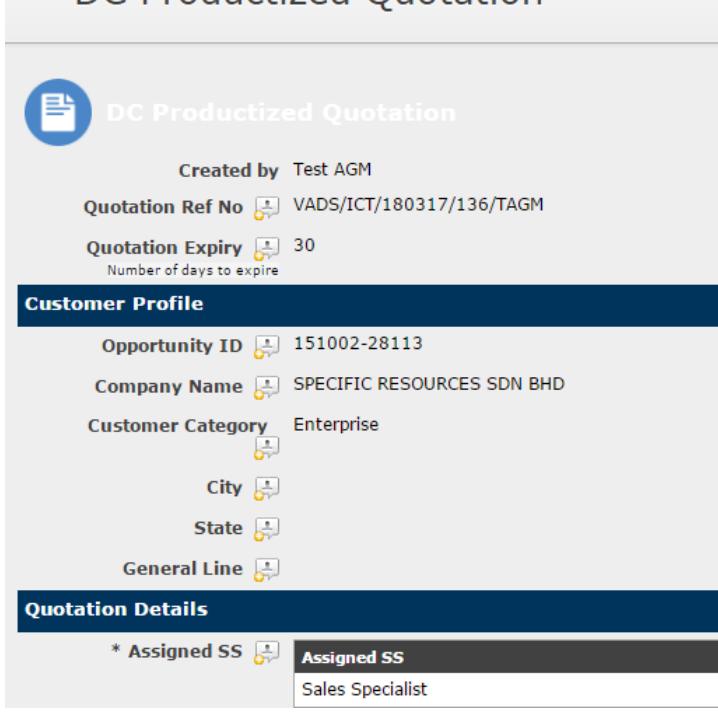
Submission No. 010964
Submitted By Test AGM
Date Started 18/Mar/2017 10:05 AM

History

Bubble	Date/time	Description
Start	18/Mar/2017 10:05 AM	Submitted to workflow
SS Insert Product & Price	18/Mar/2017 10:05 AM	Action request sent to Sales Specialist Time allocated is 3 day(s)

Discard changes

- Click on the “**Discard changes**” button, the system will display ***Quotation Details View Form***.

	<h3>DC Productized Quotation</h3>  <p>The screenshot shows a 'DC Productized Quotation' view mode form. At the top, it displays basic information: 'Created by' (Test AGM), 'Quotation Ref No' (VADS/ICT/180317/136/TAGM), and 'Quotation Expiry' (30 days). Below this is a 'Customer Profile' section containing fields for Opportunity ID (151002-28113), Company Name (SPECIFIC RESOURCES SDN BHD), Customer Category (Enterprise), City, State, and General Line. Under 'Quotation Details', there is a dropdown for 'Assigned SS' set to 'Sales Specialist'. At the bottom of the form are three buttons: 'Edit data', 'Save and submit', and 'Cancel'.</p> <ul style="list-style-type: none"> - And at the bottom of this view mode form, user can see button as below;
	<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Edit data - the system change the quotation details from view mode to editable mode ○ Save and submit - the system save the data and submit the quotation to workflow process ○ Cancel - the system display "My Taxkbox" list
	<p>Product Selected</p> <p>After update or fill-in the product line items, the next step is for the submitter to review the quotation. The user need to click on the "Product Selected" action button.</p> <p>The system will display message action as below;</p>

Submit an action - 'Product Selected'
You can use this screen to submit your action

Digital Fingerprint

This ensures that the content of the submission is exactly the same as when it was submitted



This submission, its data and uploaded file contents have been checked and verified to be untampered with.

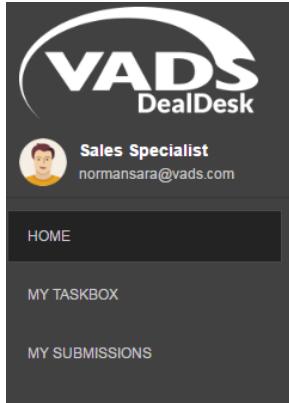
Remarks

These remarks will be saved together with your action in the history area

Confirm **Discard Changes**

- User can fill-in the below information”, and click on the “Confirm” button
 - Remarks
- and click on the “Confirm” button;

- Confirm** - system send the quotation to the PM Presales to fill-in the Professional Services and then system will display the home page



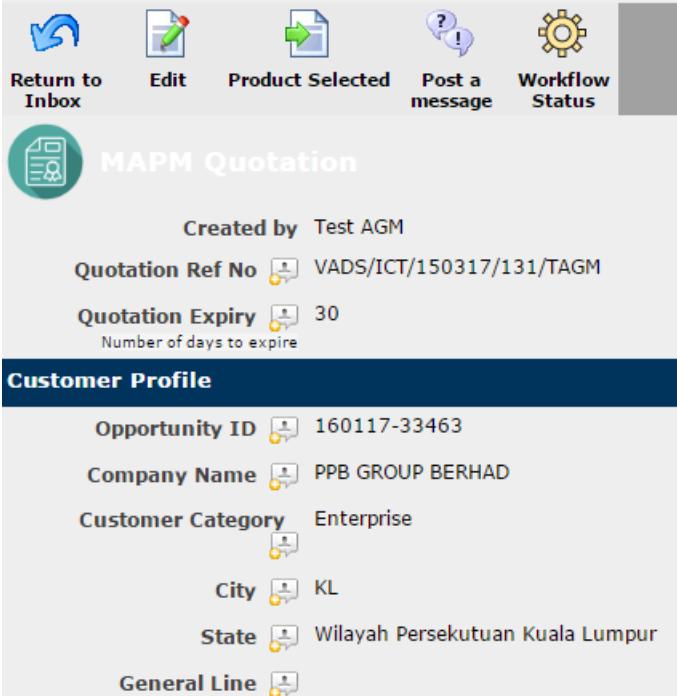
Search
Search by a combination of any fields shown below

[Switch to advanced search](#)

Search **Clear all**

Opportunity ID	<input type="text"/>
Opportunity Name	<input type="text"/>
Opportunity Owner Name	<input type="text"/>
Account Name	<input type="text"/>
Account Category	<input type="text"/> Any

- Discard Changes** - system cancel this form and display back to Quotation Details View Form

	
--	------------------------------------------------------------------------------------

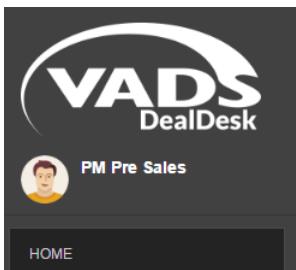
ii. Professional Services by PM Presales

On welcome page, the user can see the notification as below;



	<p>If the user click on the Start button.</p>
--	------------------------------------------------------

The system will display home page as below;



Project Management Records

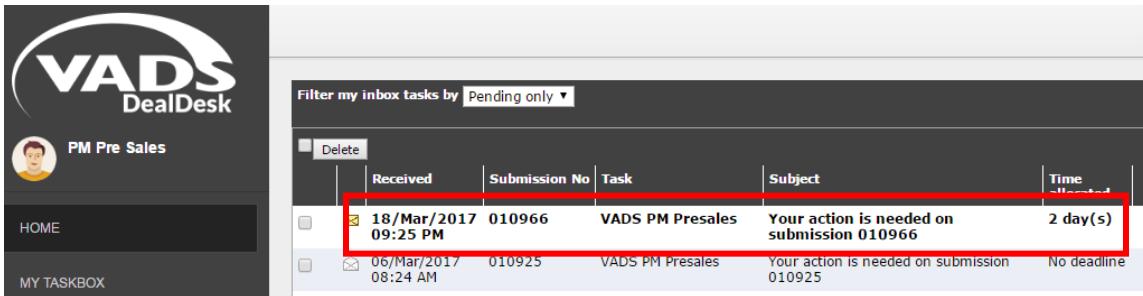
Add a new entry Search

Displaying rows: 1 to 1 (of 1 rows). Page: 1

PM Name	Project ID	Project RFS	Percentage completion	Project Status
Andy Tan Hon Why	150622-08726	08/Dec/2016	0%	Initiation

To go to the list of the task, the user need to click on the **MY TASKBOX** on the left hand-side menu.

The system will display “My Taskbox” list



Click on the Quotation Link which is the “**VADS PM Presales**” task name.

18/Mar/2017 010966 VADS PM Presales Your action is needed on submission 010966 2 day(s)

The system will display the Quotation Details Form in View Mode as below;



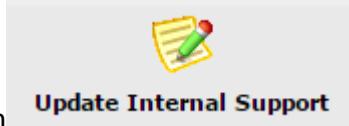
ORION

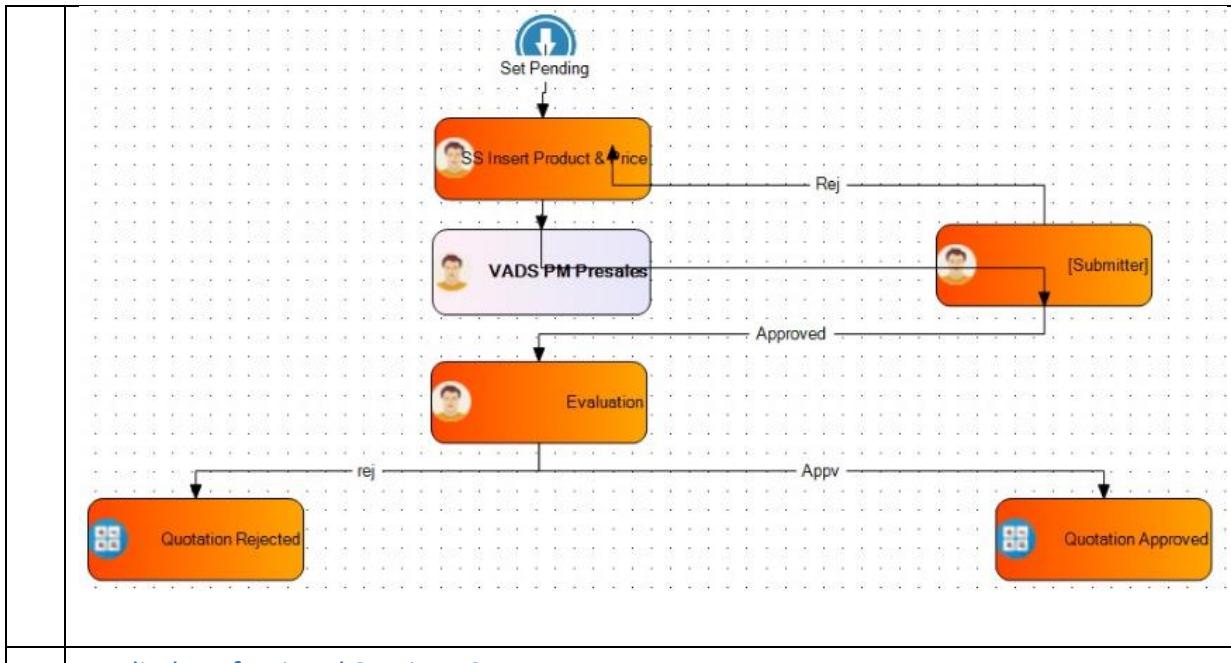
Operation & User Guide

rapid4
Enterprise App
Builder

	A screenshot of the Quotation Details form in View Mode. The top navigation bar includes icons for Return to Inbox, Edit, Update Internal Support, Reassign, Rework item, Seek Input, Post a message, and Workflow Status. Below this is a section titled "Solution Quotation". The main content area displays "Quotation Details" with fields: Created by (Test AGM), Date created (18/Mar/2017), Quotation Ref No (VADS/ICT/180317/138/TAGM), Quotation Date (18/Mar/2017), Quotation Status (Pending), Quotation Expiry (14 days), and * Assigned SS (Sales Specialist). A "Customer Profile Introduction" section follows, showing Opportunity ID (151002-28113), Opportunity Name (UPGRADE DOME 10mbps), and * Company Name (SPECIFIC RESOURCES SDN BHD).
	If the user click on the notification link; Your action is needed on submission 010966 18/Mar/2017 09:25 PM By Test AGM The system will display the Quotation Details Form in View Mode as below;

	<p>Solution Quotation</p> <p>Quotation Details</p> <p>Created by Test AGM Date created 18/Mar/2017 Quotation Ref No VADS/ICT/180317/138/TAGM Quotation Date 18/Mar/2017 Quotation Status Pending Quotation Expiry 14 Number of days to expire * Assigned SS Sales Specialist</p> <p>Customer Profile Introduction</p> <p>Opportunity ID 151002-28113 Opportunity Name UPGRADE DOME 10mbps * Company Name SPECIFIC RESOURCES SDN BHD</p>	
	<p>Action button function</p> <p>In the View Mode, at top of the page there are “Return to Inbox”, “Edit”, “Update Internal Support”, “Reassign”, “Rework Item”, “Seek Input”, “Post a Message” and “Workflow Status” Action button;</p> <p>When the user click on the button  , the system will display the “My Taskbox” list.</p> <p>When the user click on the button  , the system will display the quotation from view mode to editable mode. User can edit the quotation and line items.</p>	

	 <p>When the user click on the button Update Internal Support, the system will proceed to next workflow process which is submitter to review the quotation.</p>
	 <p>When the user click on the button Reassign, user can assign other user review this quotation.</p>
	 <p>When the user click on the button Rework item, user can ask the Sales Specialist to update the line items and revert back.</p>
	 <p>When the user click on the button Seek Input, user can ask for further information or advice regarding this quotation from others.</p>
	 <p>When the user click on the button Post a message, the system will post a message on the submission information details.</p>
	 <p>When the user click on the button Workflow Status, the system show the current status in the quotation workflow as below;</p>



Applied Professional Services Cost

To **add Professional Services line item** click on the “**Edit**” action button.

Solution Quotation form must be in **Edit Mode**.

In the **Solution Quotation** form, under **Quotation Details** section.

The screenshot shows a web-based application interface for managing internal support. The title bar says "Internal Support". Below it is a toolbar with "Internal Support" and buttons for "Add record" and "Delete". A table header row includes columns for "Group", "Service Name", "Number of Days / Ticket", "Total Selling Amount", and "Created by". A message at the bottom states "There are currently no records".

- To add Internal Support line items click on the “**Add record**” button
- System will display Internal Support and financial provision form as below



Solution Quotation > Internal Support

Created by PM Pre Sales

Principal Type Inclusive
 Yearly

Year of Contract 3

Group Project Management

Service Name --Please select a value--

Total Cost Per EWD
(Effective working day)

Total Charge
per mandays / tickets

Number of Days / Ticket

[Summary](#) | [Annual Cost](#) | [Annual Price Selling](#)

Total Cost Amount 0.00

Total Selling Amount 0.00

Margin % 0.00

At the bottom of the form, there “Save” and “Cancel” button

Save

Cancel

- “Cancel” – system will discard the changes
- “Save” – system will display Internal Support line item in *Solution Quotation*

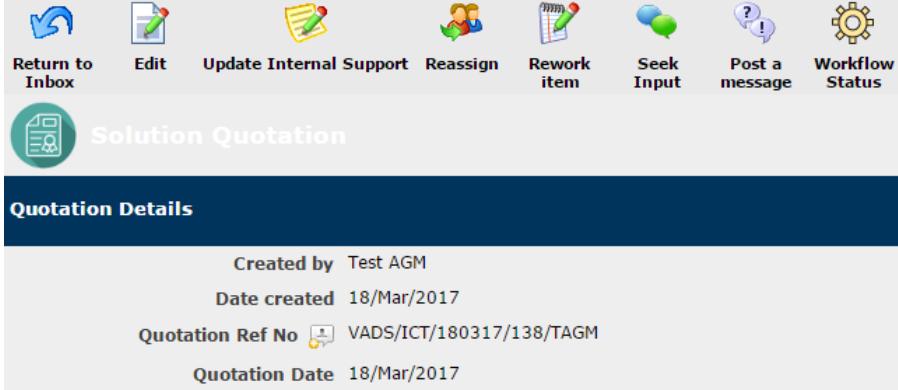
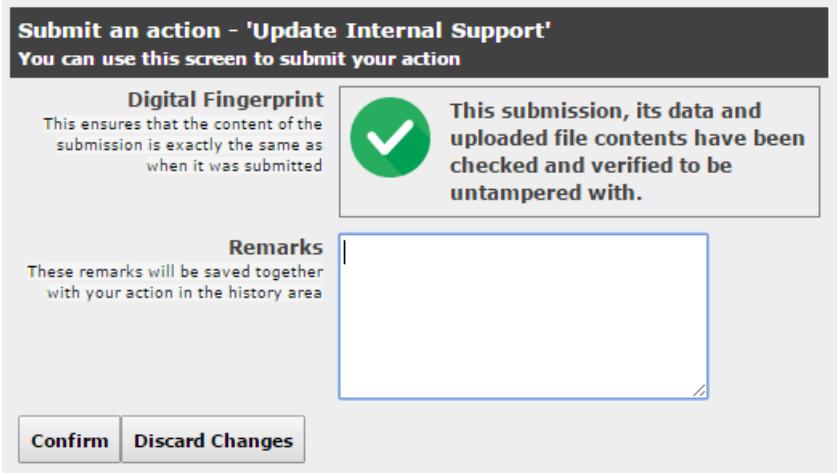
Internal Support		Add record	Delete				
Group	Service Name	Number of Days / Ticket		Total Selling Amount		Created by	
Service Engineering	Junior Engineer (Implementation)	28		16,800.00		PM Pre Sales	

In the **Quotation Details Editable Form**, at bottom of the Quotation Details Form, there “Save” and “Discard changes” button

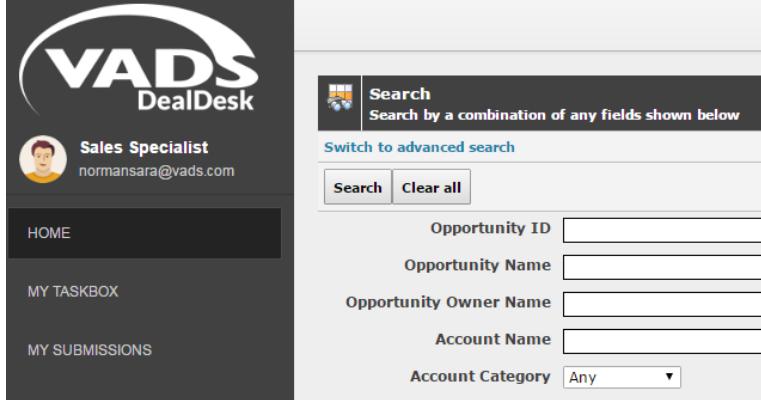
Save

Discard changes

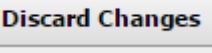
- “Discard Changes” – system will cancel the changes
- “Save” – system will display the **Quotation Details View Form** as below

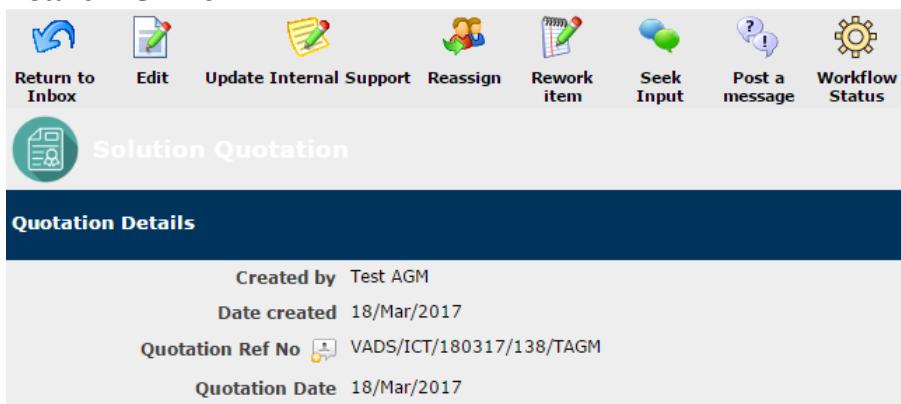
	
	<p>Update Internal Support</p> <p>After update or fill-in the professional services line items, the submitter to review the quotation. The user need to click on the “Update Internal Support” action button.</p> <p>The system will display message action as below;</p>  <ul style="list-style-type: none">• User can fill-in the below information”, and click on the “Confirm” button<ul style="list-style-type: none">◦ Remarks• and click on the “Confirm” button;

-  - system send the quotation to the submitter to review and then system will display the home page



The screenshot shows the VADS DealDesk homepage. On the left, there's a sidebar with links for 'HOME', 'MY TASKBOX', and 'MY SUBMISSIONS'. The main area has a search bar with fields for 'Opportunity ID', 'Opportunity Name', 'Opportunity Owner Name', 'Account Name', and 'Account Category'. A 'Search' button and a 'Clear all' button are also present.

-  - system cancel this form and display back to Quotation Details View Form

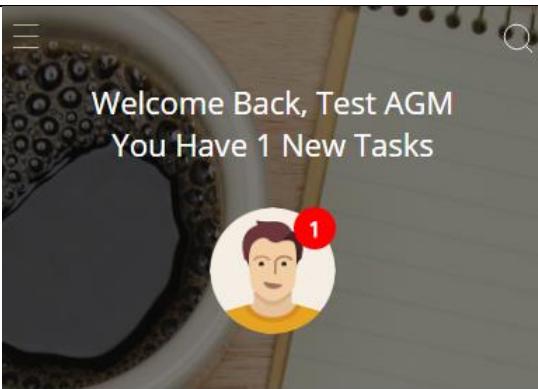


The screenshot shows the 'Quotation Details' view. At the top, there are several action buttons: 'Return to Inbox', 'Edit', 'Update Internal Support', 'Reassign', 'Rework item', 'Seek Input', 'Post a message', and 'Workflow Status'. Below these buttons, the title 'Solution Quotation' is displayed. The 'Quotation Details' section contains the following information:

- Created by Test AGM
- Date created 18/Mar/2017
- Quotation Ref No  VADS/ICT/180317/138/TAGM
- Quotation Date 18/Mar/2017

iii. Revise the Quotation by Sales Specialist Team Lead/Assistant General Manager

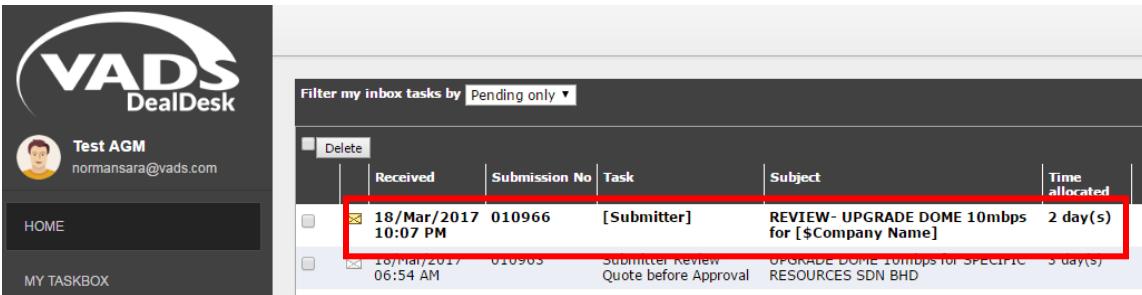
On welcome page, the user can see the notification as below;



 UPGRADE DOME 10mbps for SPECIFIC
RESOURCES SDN BHD
18/Mar/2017 10:44 AM By Test AGM

If the user click on the **Start** button.

The system will display “My Taskbox” list

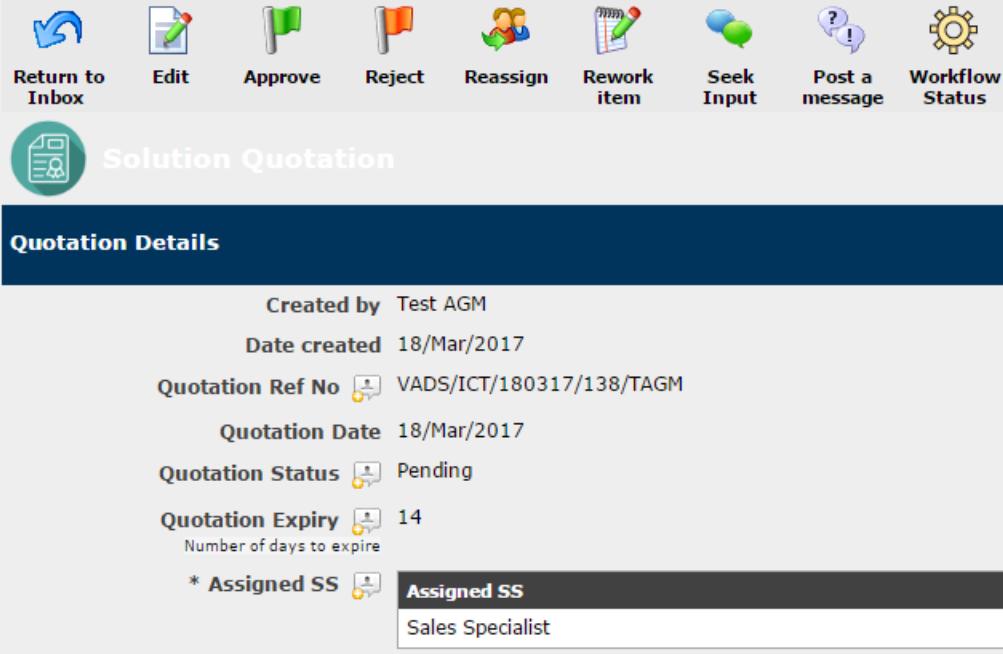
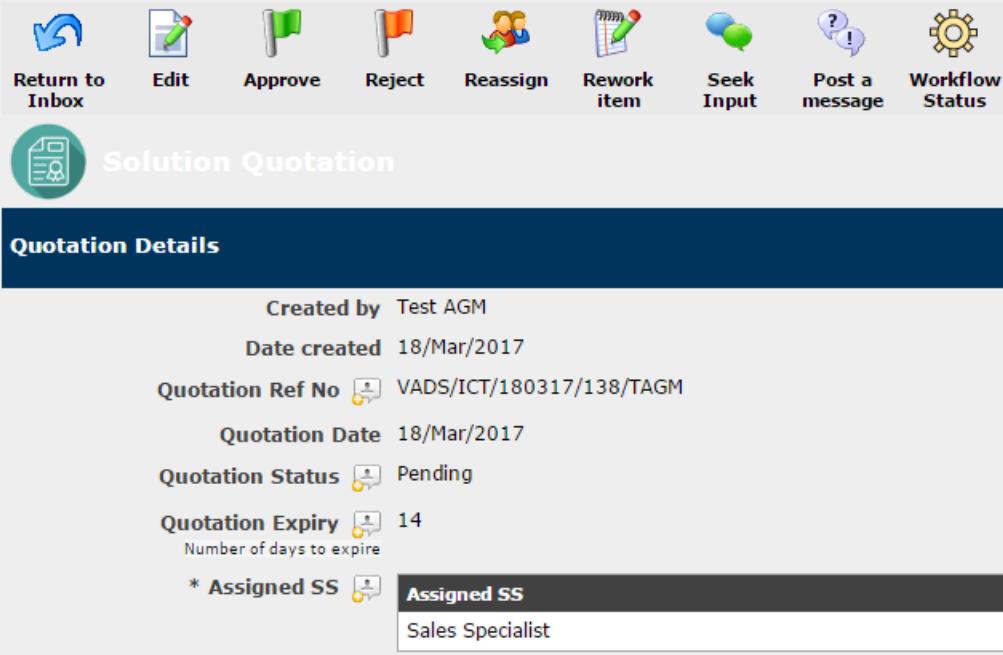


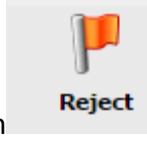
Received	Submission No	Task	Subject	Time allocated
18/Mar/2017 10:07 PM	010966	[Submitter]	REVIEW- UPGRADE DOME 10mbps for [\$Company Name]	2 day(s)
18/Mar/2017 06:54 AM	010965	Submitter Review	UPGRADE DOME 10mbps for SPECIFIC RESOURCES SDN BHD	3 day(s)

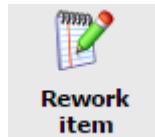
Click on the Quotation Link which is the “[Submitter]” task name.

18/Mar/2017 010966 [Submitter] REVIEW- UPGRADE DOME 10mbps 2 day(s)
10:07 PM for [\$Company Name]

The system will display the Quotation Details Form in View Mode as below;

	 <p>The screenshot shows the Quotation Details form in Edit mode. At the top, there is a toolbar with icons for Return to Inbox, Edit, Approve, Reject, Reassign, Rework item, Seek Input, Post a message, and Workflow Status. Below the toolbar, the title "Solution Quotation" is displayed next to a document icon. A dark blue header bar contains the text "Quotation Details". The main content area displays various fields with their values:</p> <ul style="list-style-type: none">Created by: Test AGMDate created: 18/Mar/2017Quotation Ref No: VADS/ICT/180317/138/TAGMQuotation Date: 18/Mar/2017Quotation Status: PendingQuotation Expiry: 14 (Number of days to expire)* Assigned SS: Sales Specialist
	<p>If the user click on the notification link;</p>  <p>UPGRADE DOME 10mbps for SPECIFIC RESOURCES SDN BHD 18/Mar/2017 10:05 AM By Test AGM</p> <p>The system will display the Quotation Details Form in View Mode as below;</p>  <p>The screenshot shows the Quotation Details form in View mode, which appears identical to the Edit mode shown above. It includes the same toolbar, title, header bar, and field values.</p>

	Action button function
	<p>In the View Mode, at top of the page there are “Return to Inbox”, “Edit”, “Approve”, “Reject”, “Reassign”, “Rework Item”, “Seek Input”, “Post a Message” and “Workflow Status” Action button;</p>  <p>When the user click on the button  , the system will display the “My Taskbox” list.</p>  <p>When the user click on the button  , the system will proceed to next workflow process which is Approval level.</p>  <p>When the user click on the button  , user can assign other user review this quotation.</p>



When the user click on the button **Rework item**, user can ask the Sales Specialist to update the line items and revert back.



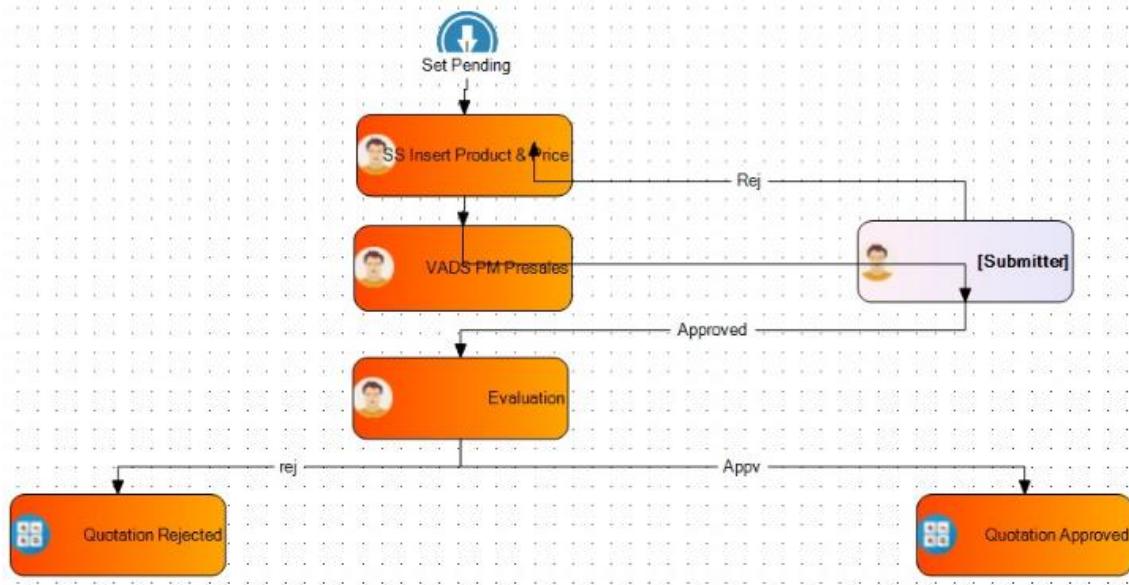
When the user click on the button **Seek Input**, user can ask for further information or advice regarding this quotation from others.



When the user click on the button **Post a message**, the system will post a message on the submission information details.



When the user click on the button **Workflow Status**, the system show the current status in the quotation workflow as below;



	<p>Approved</p> <p>After update or fill-in the product line items, PM Presales need to fill-in the Professional Services. The user need to click on the "Approved" action button.</p> <p>The system will display message action as below;</p> <div style="border: 1px solid #ccc; padding: 10px;"> <p>Submit an action - 'Approve' You can use this screen to submit your action</p> <p>Signature Your E-Signature is required</p> <p><input type="file"/> Choose File No file chosen <input type="button" value="Upload"/></p> <p>Name: PO MTP Timestamp: 18/Mar/2017 05:38 AM</p> <p>Digital Fingerprint This ensures that the content of the submission is exactly the same as when it was submitted</p> <div style="border: 1px solid #ccc; padding: 5px; margin-left: 20px;"> ✓ This submission, its data and uploaded file contents have been checked and verified to be untampered with. </div> <p>Remarks These remarks will be saved together with your action in the history area</p> <div style="border: 1px solid #ccc; height: 100px; margin-top: 10px;"></div> <p style="margin-top: 10px;"> <input type="button" value="Confirm"/> <input type="button" value="Discard Changes"/> </p> </div> <ul style="list-style-type: none"> • User can fill-in the below information, <ul style="list-style-type: none"> ○ Remarks • and click on the button below; <ul style="list-style-type: none"> ○ <input type="button" value="Confirm"/> - system send the quotation to PM Presales to fill-in the Professional Services, then system will display the home page <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Sales Specialist normansara@vads.com</p> <p>HOME</p> <p>MY TASKBOX</p> <p>MY SUBMISSIONS</p> </div> <div style="width: 45%;"> <p>Search Search by a combination of any fields shown below</p> <p>Switch to advanced search</p> <p><input type="button" value="Search"/> <input type="button" value="Clear all"/></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Opportunity ID</td> <td style="width: 85%;"><input type="text"/></td> </tr> <tr> <td>Opportunity Name</td> <td><input type="text"/></td> </tr> <tr> <td>Opportunity Owner Name</td> <td><input type="text"/></td> </tr> <tr> <td>Account Name</td> <td><input type="text"/></td> </tr> <tr> <td>Account Category</td> <td><input type="text"/> Any</td> </tr> </table> </div> </div>	Opportunity ID	<input type="text"/>	Opportunity Name	<input type="text"/>	Opportunity Owner Name	<input type="text"/>	Account Name	<input type="text"/>	Account Category	<input type="text"/> Any
Opportunity ID	<input type="text"/>										
Opportunity Name	<input type="text"/>										
Opportunity Owner Name	<input type="text"/>										
Account Name	<input type="text"/>										
Account Category	<input type="text"/> Any										

	<ul style="list-style-type: none"> ○ Discard Changes - system cancel this form and display back to Quotation <p>Details View Form</p>	
	<p>Reject</p> <p>To Reject or Cancel the quotation, the user need to click on the "Reject" action button.</p> <p>The system will display message action as below;</p> <p>Submit an action - 'Reject' You can use this screen to submit your action</p> <p>Signature Your E-Signature is required</p> <p>Choose File No file chosen Upload</p> <p>Name: PO MTP Timestamp: 18/Mar/2017 05:02 AM</p> <p>Digital Fingerprint This ensures that the content of the submission is exactly the same as when it was submitted</p> <p>This submission, its data and uploaded file contents have been checked and verified to be untampered with.</p> <p>Remarks * These remarks will be saved together with your action in the history area</p> <p>Confirm Discard Changes</p> <ul style="list-style-type: none"> • User can fill-in the below information, <ul style="list-style-type: none"> ○ Remarks • and click on the button below; 	

- **Confirm** - System change the status to “Rejected” and stop the workflow, then system will display the home page.

- **Discard Changes** - System cancel this form and display back to Quotation Details View Form

Quotation Details

Created by Test AGM
Date created 18/Mar/2017
Quotation Ref No VADS/ICT/180317/138/TAGM
Quotation Date 18/Mar/2017
Quotation Status Pending
Quotation Expiry 14
Number of days to expire
* Assigned SS Sales Specialist

5) Approval

a. Approval View

On welcome page, the user can see the notification as below;

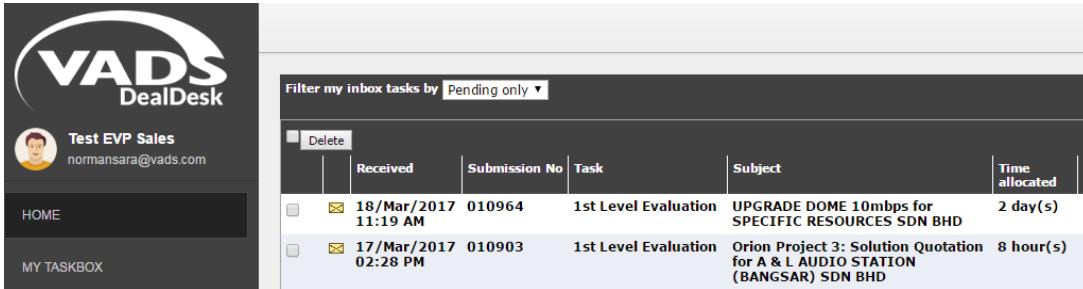


VSAT iDirect 2Mbps@Merotai for SYARIKAT
PERLANTING JERNEH PLANTATION SDN BHD
08/Mar/2017 04:37 PM By Team lead SS

Start

If the user click on the **Start** button.

The system will display home page as below;



Click on the Quotation Link which is the "**1st Level Evaluation**" task name.

18/Mar/2017 010964 1st Level Evaluation UPGRADE DOME 10mbps for SPECIFIC RESOURCES SDN BHD 2 day(s)

The system will display the Quotation Details Form in View Mode as below;



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	 DC Productized Quotation Created by Test AGM Quotation Ref No VADS/ICT/180317/136/TAGM Quotation Expiry 30 Number of days to expire Customer Profile Opportunity ID 151002-28113 Company Name SPECIFIC RESOURCES SDN BHD Customer Category Enterprise City State General Line If the user click on the notification link; PPBGROUP_DOME10M_3YEARS for PPB GROUP BERHAD 17/Mar/2017 03:24 PM By Test AGM The system will display the Quotation Details Form in View Mode as below;
--	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	<p>DC Productized Quotation</p> <p>Created by Test AGM</p> <p>Quotation Ref No VADS/ICT/180317/136/TAGM</p> <p>Quotation Expiry 30 Number of days to expire</p> <p>Customer Profile</p> <p>Opportunity ID 151002-28113</p> <p>Company Name SPECIFIC RESOURCES SDN BHD</p> <p>Customer Category Enterprise</p> <p>City </p> <p>State </p> <p>General Line </p>
	<p>Action button function</p> <p>In the View Mode, at top of the page there are “Return to Inbox”, “Edit”, “Approve”, “Reject”, “Rework Item”, “Seek Input”, “Post a Message” and “Workflow Status”</p> <p>Action button;</p>
	<p>When the user click on the button Return to listing, the system will display the “My Taskbox” list.</p>



Approve

When the user click on the button , the system will proceed to next workflow process which is PM Pre sales fill-in the Professional Services.



Reject

When the user click on the button , the system will change the quotation status to reject and stop the workflow.



Rework item

When the user click on the button , user can ask the Sales Specialist to update the line items and revert back.



Seek
Input

When the user click on the button , user can ask for further information or advice regarding this quotation from others.



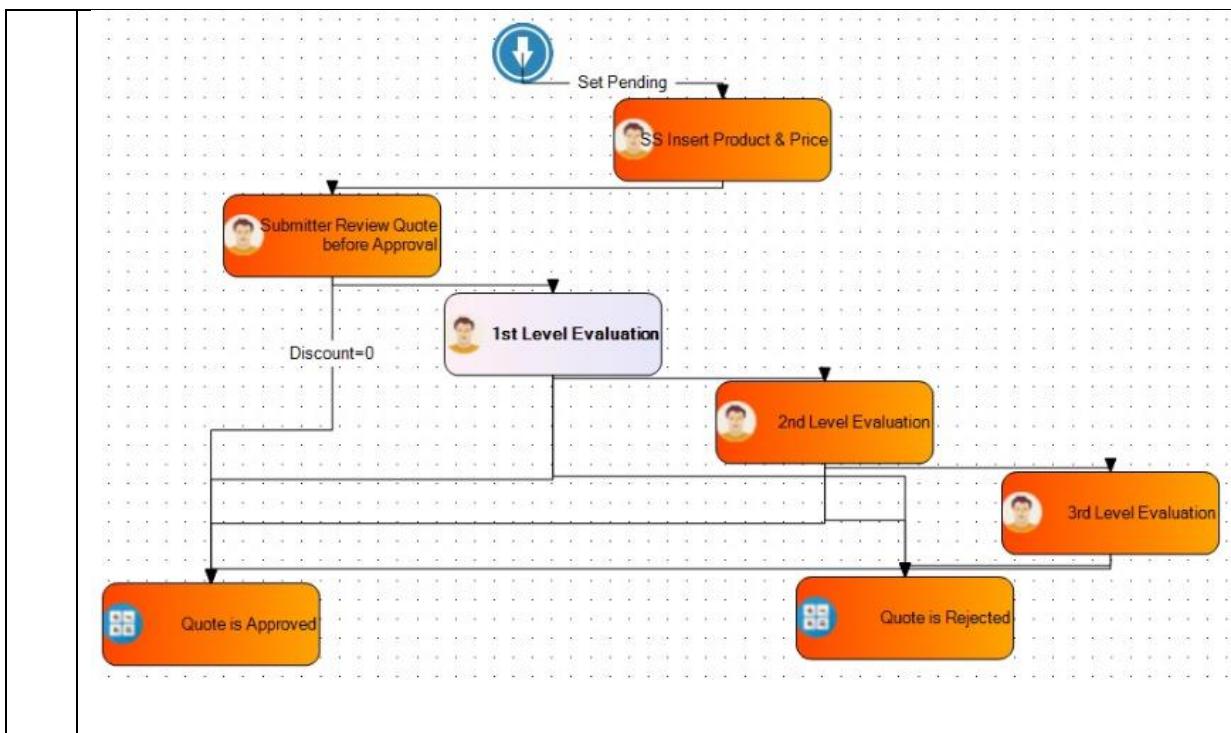
Post a
message

When the user click on the button , the system will post a message on the submission information details.



Workflow
Status

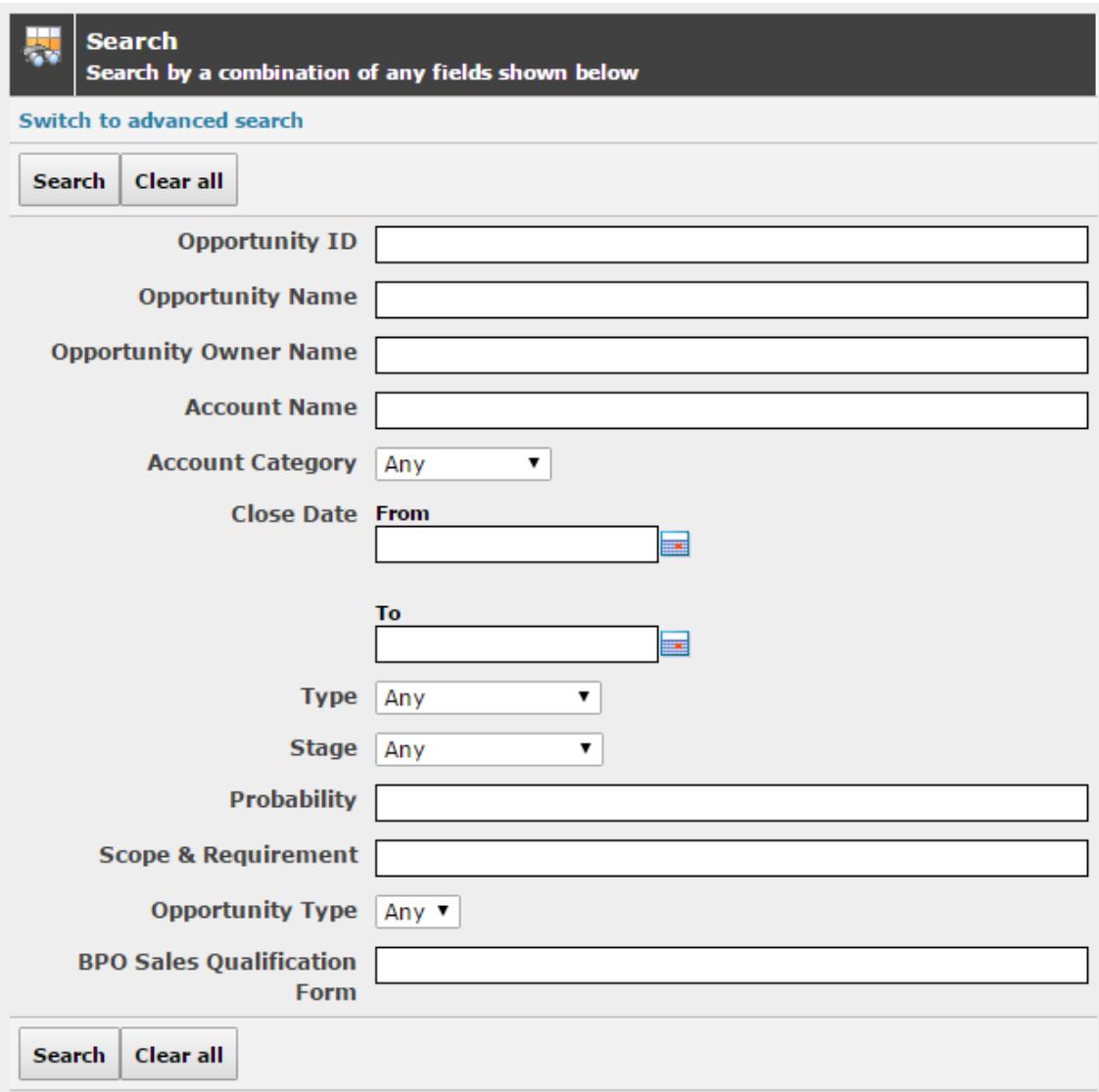
When the user click on the button , the system show the current status in the quotation workflow as below;



6) Search Opportunity

1.

From the Main Page, on the left menu click on the **SEARCH OPPORTUNITY** link.
The system will display Opportunity Search Form as below;



The screenshot shows the 'Search' interface for opportunities. At the top, there's a header bar with a search icon and the word 'Search'. Below it, a sub-header says 'Search by a combination of any fields shown below'. A link 'Switch to advanced search' is available. There are two buttons at the top left: 'Search' and 'Clear all'. The form consists of several input fields and dropdown menus:

- Opportunity ID
- Opportunity Name
- Opportunity Owner Name
- Account Name
- Account Category (dropdown: Any)
- Close Date: From (date picker), To (date picker)
- Type (dropdown: Any)
- Stage (dropdown: Any)
- Probability
- Scope & Requirement
- Opportunity Type (dropdown: Any)
- BPO Sales Qualification Form

At the bottom, there are two buttons: 'Search' and 'Clear all'.

- **Search**
 - Fill in the **value of the field** that want to search.
 - If the user click on the "Search" button on the bottom of the form.

Search
Search by a combination of any fields shown below

[Switch to advanced search](#)

Search	Clear all
Opportunity ID <input type="text" value="33463"/>	
Opportunity Name <input type="text"/>	
Opportunity Owner Name <input type="text"/>	
Account Name <input type="text"/>	
Account Category <input type="text" value="Any"/>	
Close Date From <input type="text"/>	
To <input type="text"/>	
Type <input type="text" value="Any"/>	
Stage <input type="text" value="Any"/>	
Probability <input type="text"/>	
Scope & Requirement <input type="text"/>	
Opportunity Type <input type="text" value="Any"/>	
BPO Sales Qualification Form <input type="text"/>	
Search	Clear all

- Result of the search, which will list all the opportunity that contain “33463” in the “Opportunity ID” field.

Opportunities List

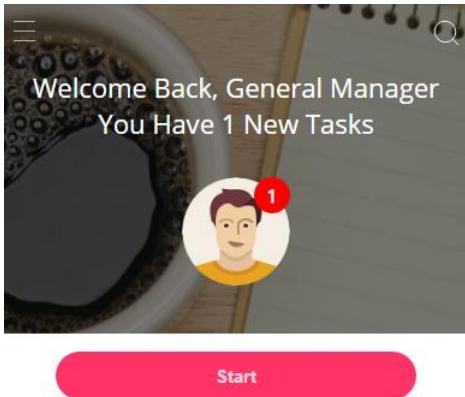
Search		
Displaying rows: 1 to 1 (of 1 rows). Page: 1		
Opportunity Owner	Account Name	Opportunity ID
CHONG MOI FUNG (Ent Account Manager Penang)	PPB GROUP BERHAD	PPB

- Clear All**
 - To **Clear all the searched** value click ok the “**Clear All**” button
 - If the user click on the Search button, the result from **Opportunity Search Form** will list **all** of the opportunity.

7) Approval

b. Approval View

On welcome page, the user can see the notification as below;

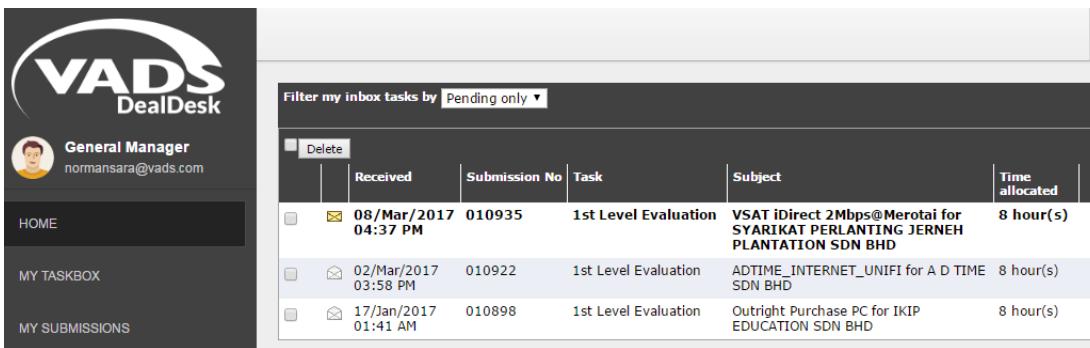


 VSAT iDirect 2Mbps@Merotai for SYARIKAT
PERLANTING JERNEH PLANTATION SDN BHD
08/Mar/2017 04:37 PM By Team lead SS

Start

If the user click on the **Start** button.

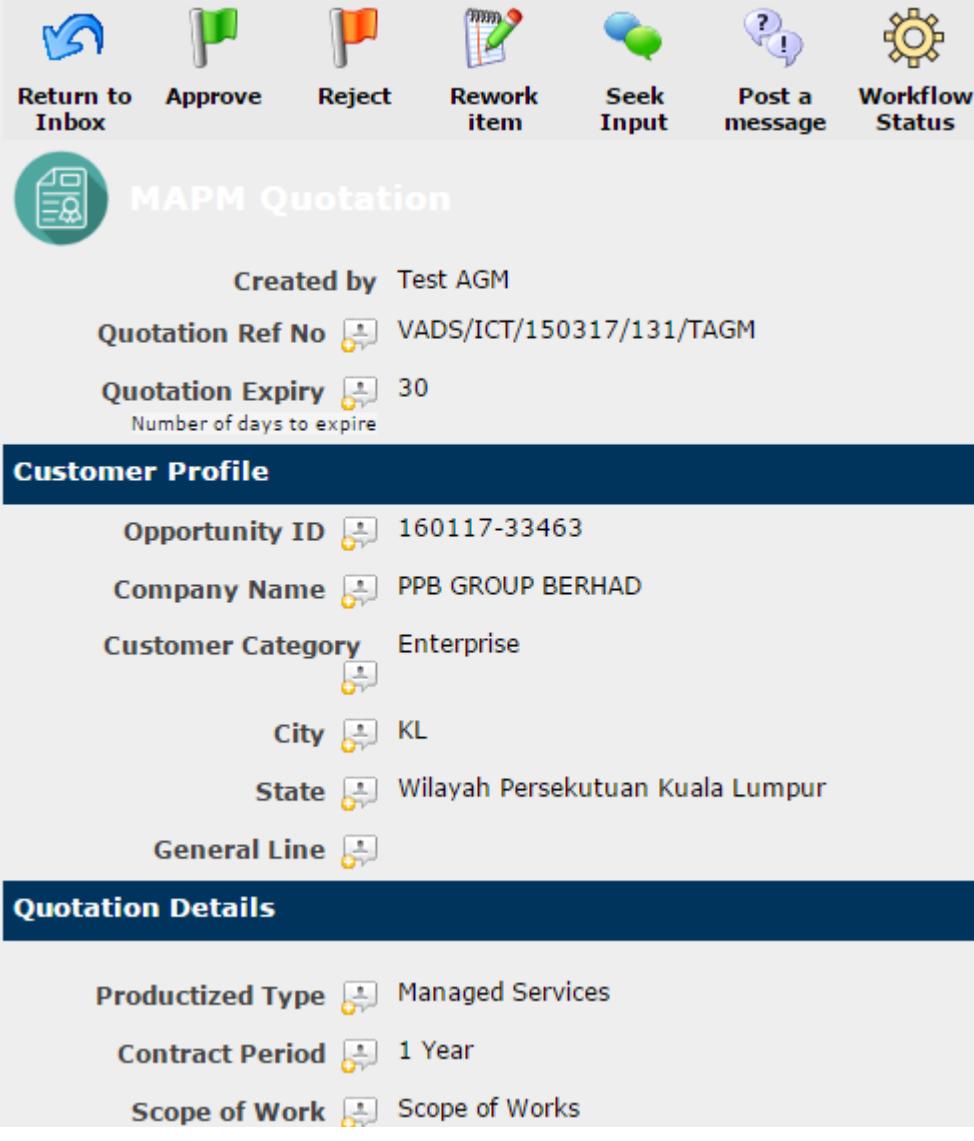
The system will display “My Taskbox” list as below;

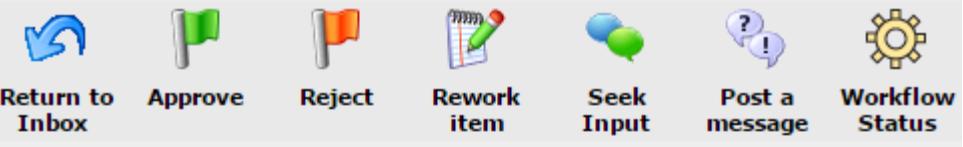


Filter my inbox tasks by Pending only ▾					
<input type="checkbox"/> Delete	Received	Submission No	Task	Subject	Time allocated
<input type="checkbox"/>	08/Mar/2017 04:37 PM	010935	1st Level Evaluation	VSAT iDirect 2Mbps@Merotai for SYARIKAT PERLANTING JERNEH PLANTATION SDN BHD	8 hour(s)
<input type="checkbox"/>	02/Mar/2017 03:58 PM	010922	1st Level Evaluation	ADTIME_INTERNET_UNIFI for A D TIME SDN BHD	8 hour(s)
<input type="checkbox"/>	17/Jan/2017 01:41 AM	010898	1st Level Evaluation	Outright Purchase PC for IKIP EDUCATION SDN BHD	8 hour(s)

Click on the Quotation Link which is the “**1st Level Evaluation**” task name.

08/Mar/2017 010935 1st Level Evaluation VSAT iDirect 2Mbps@Merotai for SYARIKAT PERLANTING JERNEH PLANTATION SDN BHD
04:37 PM

	<p>The system will display the Quotation Details Form in View Mode as below;</p>  <p>The screenshot shows the Quotation Details Form in View Mode. At the top, there is a row of seven icons with labels: Return to Inbox, Approve, Reject, Rework item, Seek Input, Post a message, and Workflow Status. Below this is a section titled "MAPM Quotation". It displays the following details:</p> <ul style="list-style-type: none">Created by: Test AGMQuotation Ref No: VADS/ICT/150317/131/TAGMQuotation Expiry: 30 (Number of days to expire) <p>A dark blue header bar labeled "Customer Profile" contains the following information:</p> <ul style="list-style-type: none">Opportunity ID: 160117-33463Company Name: PPB GROUP BERHADCustomer Category: EnterpriseCity: KLState: Wilayah Persekutuan Kuala LumpurGeneral Line <p>A dark blue header bar labeled "Quotation Details" contains the following information:</p> <ul style="list-style-type: none">Productized Type: Managed ServicesContract Period: 1 YearScope of Work: Scope of Works
	<p>If the user click on the notification link;</p>  PPBGROUP_DOME10M_3YEARS for PPB GROUP BERHAD 17/Mar/2017 03:24 PM By Test AGM

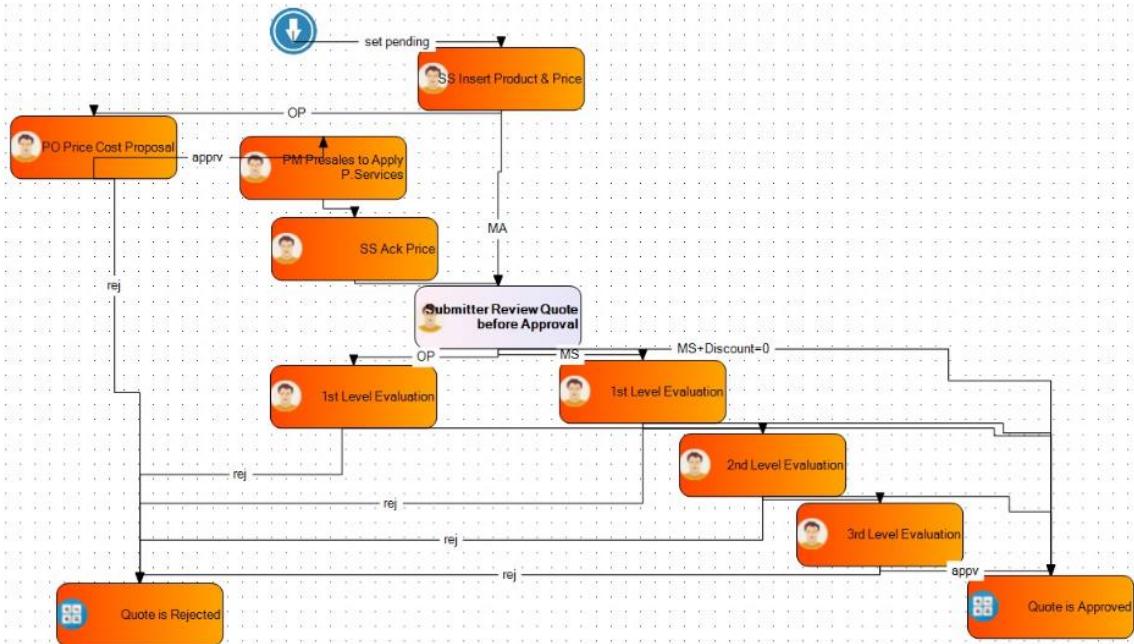
	 <p>MAPM Quotation</p> <p>Created by Test AGM</p> <p>Quotation Ref No  VADS/ICT/150317/131/TAGM</p> <p>Quotation Expiry  30 Number of days to expire</p> <p>Customer Profile</p> <p>Opportunity ID  160117-33463</p> <p>Company Name  PPB GROUP BERHAD</p> <p>Customer Category  Enterprise</p> <p>City  KL</p> <p>State  Wilayah Persekutuan Kuala Lumpur</p> <p>General Line </p> <p>Quotation Details</p> <p>Productized Type  Managed Services</p> <p>Contract Period  1 Year</p> <p>Scope of Work  Scope of Works</p>
	Action button function
	In the View Mode , at top of the page there are “Return to Inbox”, “Edit”, “Approve”, “Reject”, “Rework Item”, “Seek Input”, “Post a Message” and “Workflow Status” Action button;

	 <p>When the user click on the button list., the system will display the “My Taskbox”</p>
	 <p>When the user click on the button Edit, the system will display the quotation from view mode to editable mode. User can edit the quotation and line items.</p>
	 <p>When the user click on the button Quotation is Ready for Approval, the system will proceed to next workflow process which is Approval.</p>
	 <p>When the user click on the button Reassign, user can assign other user review this quotation.</p>
	 <p>When the user click on the button Rework item, user can ask the Sales Specialist to update the line items and revert back.</p>
	 <p>When the user click on the button Seek Input, user can ask for further information or advice regarding this quotation from others.</p>

When the user click on the button  , the system will post a message on the submission information details.



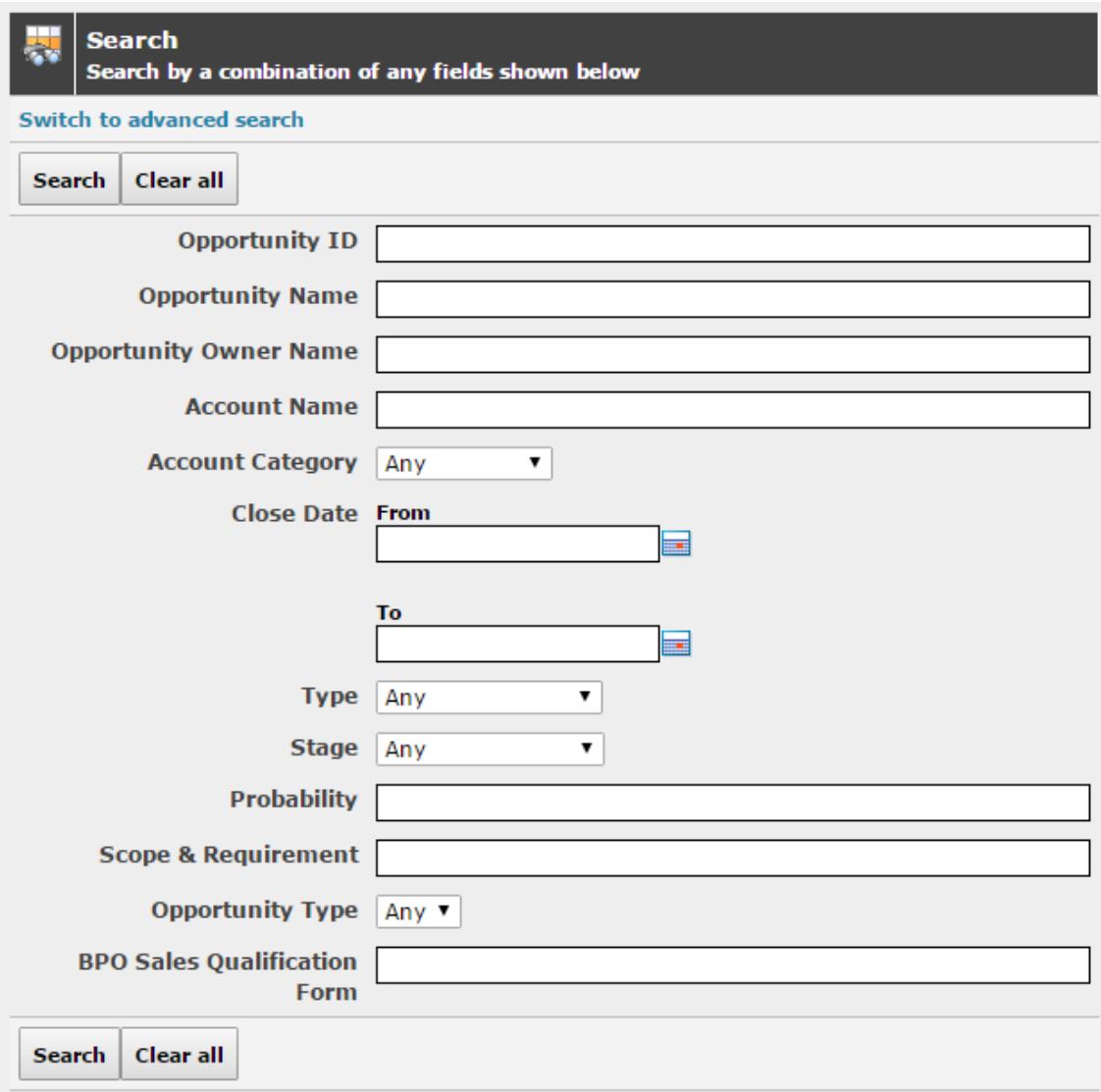
When the user click on the button  , the system show the current status in the quotation workflow as below;



8) Search Opportunity

2.

From the Main Page, on the left menu click on the **SEARCH OPPORTUNITY** link.
The system will display Opportunity Search Form as below;



The screenshot shows the 'Search' interface for opportunities. At the top, there's a header with a search icon and the word 'Search'. Below it, a sub-header says 'Search by a combination of any fields shown below'. A link 'Switch to advanced search' is present. There are two buttons at the top left: 'Search' and 'Clear all'. The form consists of several input fields and dropdown menus:

- Opportunity ID
- Opportunity Name
- Opportunity Owner Name
- Account Name
- Account Category: A dropdown menu showing 'Any'.
- Close Date: A date range selector with 'From' and 'To' fields, each with a calendar icon.
- Type: A dropdown menu showing 'Any'.
- Stage: A dropdown menu showing 'Any'.
- Probability
- Scope & Requirement
- Opportunity Type: A dropdown menu showing 'Any'.
- BPO Sales Qualification Form

At the bottom, there are two buttons: 'Search' and 'Clear all'.

- **Search**
 - Fill in the **value of the field** that want to search.
 - If the user click on the "Search" button on the bottom of the form.

Search
Search by a combination of any fields shown below

[Switch to advanced search](#)

Search	Clear all
Opportunity ID <input type="text" value="33463"/>	
Opportunity Name <input type="text"/>	
Opportunity Owner Name <input type="text"/>	
Account Name <input type="text"/>	
Account Category Any <input type="button" value="▼"/>	
Close Date From <input type="text"/> <input type="button" value="▼"/>	
To <input type="text"/> <input type="button" value="▼"/>	
Type Any <input type="button" value="▼"/>	
Stage Any <input type="button" value="▼"/>	
Probability <input type="text"/>	
Scope & Requirement <input type="text"/>	
Opportunity Type Any <input type="button" value="▼"/>	
BPO Sales Qualification Form <input type="text"/>	
Search	Clear all

- Result of the search, which will list all the opportunity that contain “33463” in the “Opportunity ID” field.

Opportunities List

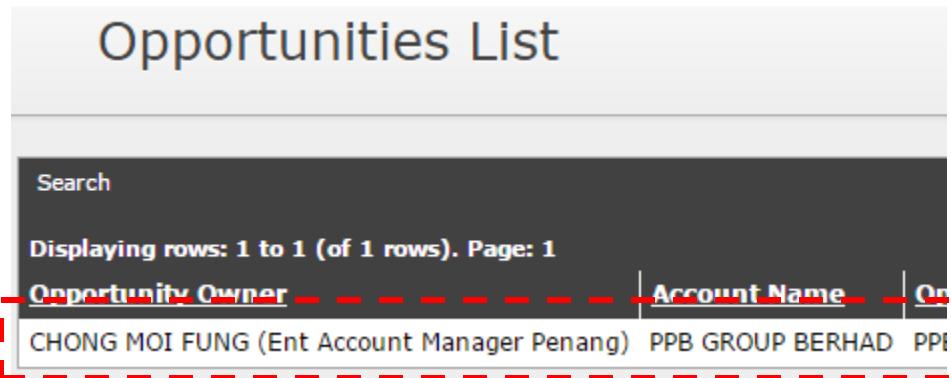
Search		
Displaying rows: 1 to 1 (of 1 rows). Page: 1		
Opportunity Owner	Account Name	Opportunity ID
CHONG MOI FUNG (Ent Account Manager Penang)	PPB GROUP BERHAD	PPI

- Clear All***

- To ***Clear all the searched*** value click ok the “***Clear All***” button
- If the user click on the Search button, the result from ***Opportunity Search Form*** will list ***all*** of the opportunity.

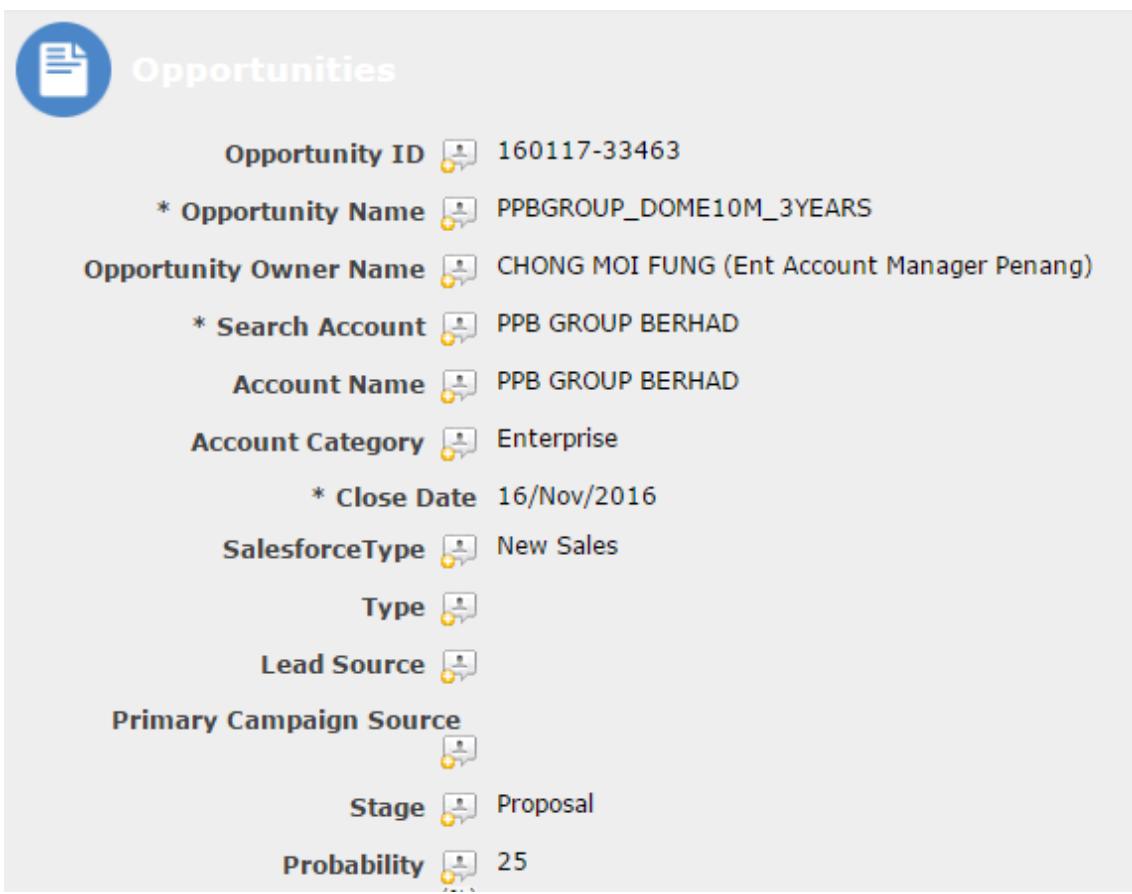
9) Revise Quotation

- From the Opportunity search result, click on the Opportunity link;



The screenshot shows a table titled "Opportunities List". The table has columns for "Opportunity Owner", "Account Name", and "Other". A single row is displayed, showing "CHONG MOI FUNG (Ent Account Manager Penang)" in the "Opportunity Owner" column and "PPB GROUP BERHAD" in the "Account Name" column. A red dashed box surrounds the entire row.

The system will display the Opportunity Details View form.



The screenshot shows the "Opportunities" details view. The form includes the following fields:

- Opportunity ID: 160117-33463
- * Opportunity Name: PPBGROUP_DOME10M_3YEARS
- Opportunity Owner Name: CHONG MOI FUNG (Ent Account Manager Penang)
- * Search Account: PPB GROUP BERHAD
- Account Name: PPB GROUP BERHAD
- Account Category: Enterprise
- * Close Date: 16/Nov/2016
- SalesforceType: New Sales
- Type: (empty)
- Lead Source: (empty)
- Primary Campaign Source: (empty)
- Stage: Proposal
- Probability: 25

At the *Quotation section*, click on the quotation link which *status* is **Approved**.

Quotations													
<p style="margin: 0;">MAPM Pricing Request Form Click Here To View</p> <p style="margin: 0;">PRF002</p> <p style="margin: 0;">MAPM Quotations View</p> <p style="margin: 0;">Solution CMT View</p> <p style="margin: 0;">DC Productized Quotations View</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Quotation Ref No</td> <td style="width: 50%;">Quotation Status</td> </tr> <tr> <td>VADS/ICT/150317/131/TAGM</td> <td>Approved</td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Quotation Ref No</td> <td style="width: 50%;">Quotation Status</td> </tr> <tr> <td colspan="2">There are currently no records</td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Quotation Ref No</td> <td style="width: 50%;">Quotation Status</td> </tr> <tr> <td>VADS/ICT/170317/132/TLSS</td> <td>Pending</td> </tr> </table>	Quotation Ref No	Quotation Status	VADS/ICT/150317/131/TAGM	Approved	Quotation Ref No	Quotation Status	There are currently no records		Quotation Ref No	Quotation Status	VADS/ICT/170317/132/TLSS	Pending
Quotation Ref No	Quotation Status												
VADS/ICT/150317/131/TAGM	Approved												
Quotation Ref No	Quotation Status												
There are currently no records													
Quotation Ref No	Quotation Status												
VADS/ICT/170317/132/TLSS	Pending												

2. The system displayed selected **MAPM Quotation Details form** as below;

MAPM Quotation	
<p style="margin: 0;">MAPM Quotation</p> <p style="margin: 0;">Created by Test AGM Date created 15/Mar/2017 08:19 PM</p> <p style="margin: 0;">Quotation Ref No VADS/ICT/150317/131/TAGM Quotation Status Approved</p> <p style="margin: 0;">Quotation Expiry 30 Quotation Date 15 March 2017</p> <p style="margin: 0;">Number of days to expire</p>	
Customer Profile	
<p style="margin: 0;">Opportunity ID 160117-33463 Opportunity Name PPBGROUP_DOME10M_3YEARS</p> <p style="margin: 0;">Company Name PPB GROUP BERHAD Company No PS/0008167-W</p> <p style="margin: 0;">Customer Category Enterprise Address L3 Cheras Leisure Mall, 8 Jalan N</p> <p style="margin: 0;">City KL Postcode 56100</p> <p style="margin: 0;">State Wilayah Persekutuan Kuala Lumpur Country Malaysia</p> <p style="margin: 0;">General Line Website</p>	
Quotation Details	

At bottom of the page there are “**Save**”, “**Save and Submit**”, “**Discard Changes**”, “**Generate PDF**”, “**New Revision**” and “**Upgrade/Downgrade**” button

New Revision

Click on the button

The system will pop-up confirmation message to generate a new revision as below;

49.236.195.52 says:

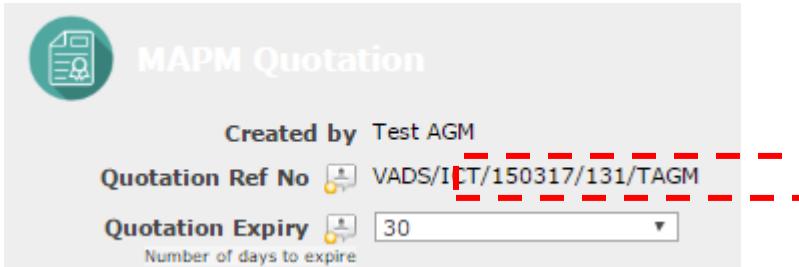
Are you sure you wish to generate a new revision?

OK

Cancel

After user click on “OK” button, the system will create new quotation and add revise no to the Quotation Ref No as shown below;

Before Revise Quotation



MAPM Quotation

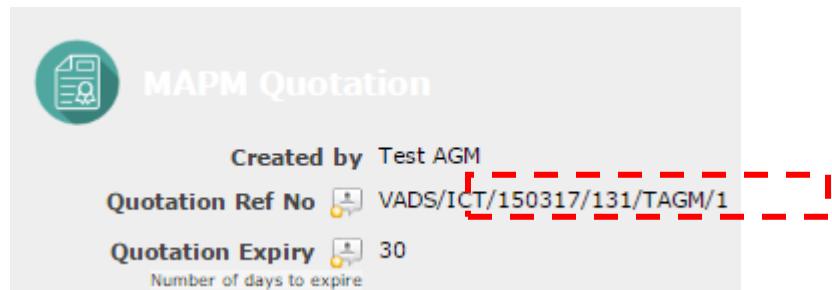
Created by Test AGM

Quotation Ref No VADS/ICT/150317/131/TAGM

Quotation Expiry 30

Number of days to expire

After Revise Quotation



MAPM Quotation

Created by Test AGM

Quotation Ref No VADS/ICT/150317/131/TAGM/1

Quotation Expiry 30

Number of days to expire

From the Quotation List, user can see the revise quotation as below;



ORION

Operation & User Guide

rapid4
Enterprise App
Builder

Quotations

MAPM Pricing Request Form [Click Here To View](#)

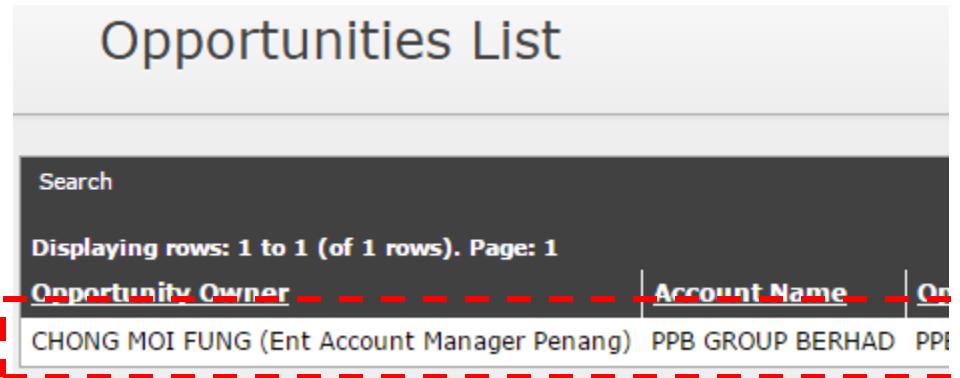
PRFO02

MAPM Quotations

Quotation Ref No	Quotation Status
VADS/ICT/150317/131/TAGM/1	Draft
VADS/ICT/150317/131/TAGM	Approved

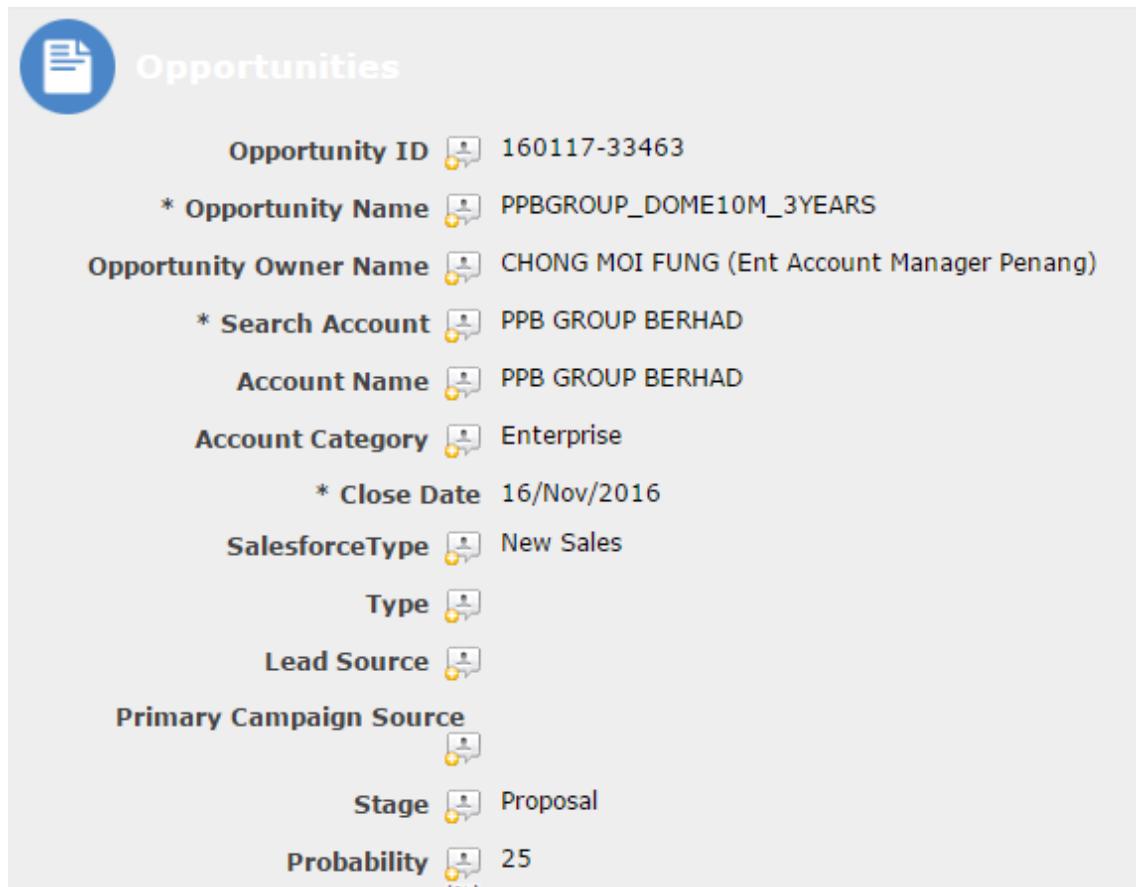
10) Upgrade/ Downgrade Quotation

- From the Opportunity search result, click on the Opportunity link;



The screenshot shows a table titled "Opportunities List". The table has a header row with columns labeled "Opportunity Owner", "Account Name", and "Quotations". Below the header, there is one data row containing the following information:
Opportunity Owner: CHONG MOI FUNG (Ent Account Manager Penang)
Account Name: PPB GROUP BERHAD
Quotations: PPI

The system will display the Opportunity Details View form.



The screenshot shows the "Opportunities" details view form. The form includes the following fields and their values:

Opportunity ID	160117-33463
* Opportunity Name	PPBGROUP_DOME10M_3YEARS
Opportunity Owner Name	CHONG MOI FUNG (Ent Account Manager Penang)
* Search Account	PPB GROUP BERHAD
Account Name	PPB GROUP BERHAD
Account Category	Enterprise
* Close Date	16/Nov/2016
SalesforceType	New Sales
Type	
Lead Source	
Primary Campaign Source	
Stage	Proposal
Probability	25

At the *Quotation section*, click on the quotation link which *status* is **Approved**.

	<p>Quotations</p> <p style="text-align: center;">MAPM Pricing Request Form Click Here To View</p> <p style="text-align: center;">PRF002</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;">MAPM Quotations</td> <td style="width: 40%;">Quotation Ref No VADS/ICT/150317/131/TAGM</td> <td style="width: 40%;">Quotation Status Approved</td> </tr> <tr> <td>Solution CMT</td> <td>Quotation Ref No There are currently no records</td> <td>Quotation Status</td> </tr> <tr> <td>DC Productized Quotations</td> <td>Quotation Ref No VADS/ICT/170317/132/TLSS</td> <td>Quotation Status Pending</td> </tr> </table>	MAPM Quotations	Quotation Ref No VADS/ICT/150317/131/TAGM	Quotation Status Approved	Solution CMT	Quotation Ref No There are currently no records	Quotation Status	DC Productized Quotations	Quotation Ref No VADS/ICT/170317/132/TLSS	Quotation Status Pending	
MAPM Quotations	Quotation Ref No VADS/ICT/150317/131/TAGM	Quotation Status Approved									
Solution CMT	Quotation Ref No There are currently no records	Quotation Status									
DC Productized Quotations	Quotation Ref No VADS/ICT/170317/132/TLSS	Quotation Status Pending									
2.	<p>The system displayed selected MAPM Quotation Details form as below;</p> <p>MAPM Quotation</p> <p></p> <p>At bottom of the page there are “Save”, “Save and Submit”, “Discard Changes”, “Generate PDF”, “New Revision” and “Upgrade/Downgrade” button</p> <p>Click on the button </p> <p>The system will alert the user with below message;</p>										

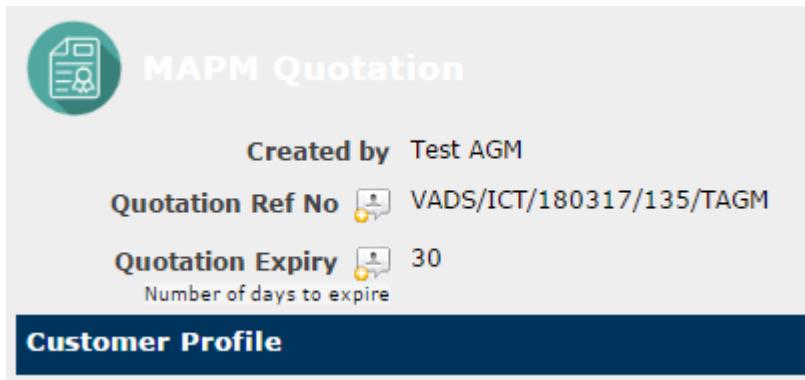
203.76.174.111 says:

Are you sure you wish to generate a new quote for upgrade/downgrade?

OK

Cancel

After user click on “OK” button, the system will create new quotation without Quotation Ref No as shown below;

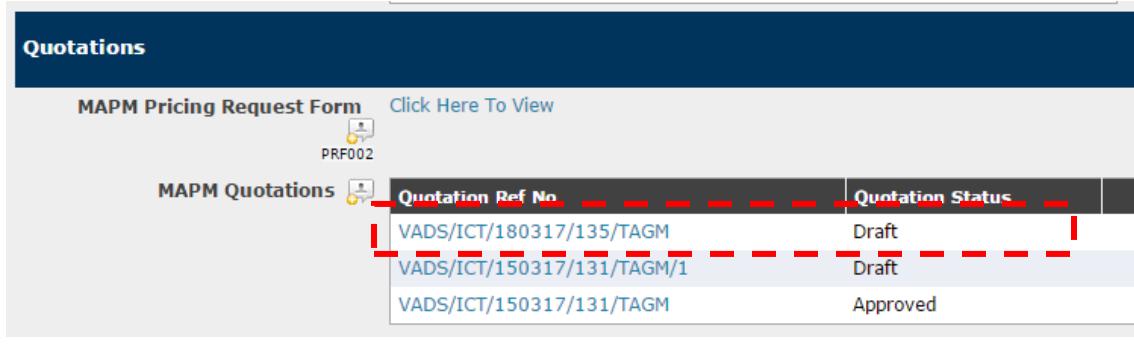


The screenshot shows a modal window titled "MAPM Quotation". It displays the following information:

- Created by: Test AGM
- Quotation Ref No: VADS/ICT/180317/135/TAGM
- Quotation Expiry: 30 (Number of days to expire)

A dark blue bar at the bottom contains the text "Customer Profile".

From the Quotation List, user can see the revise quotation as below;

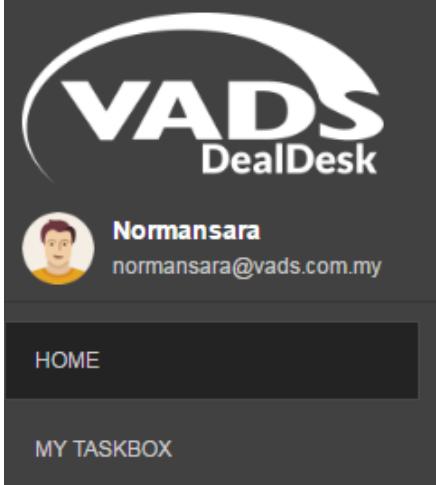
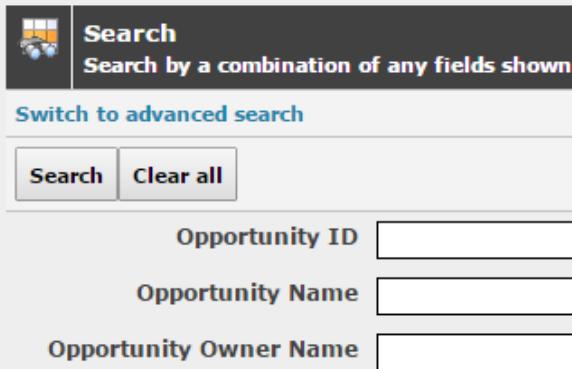
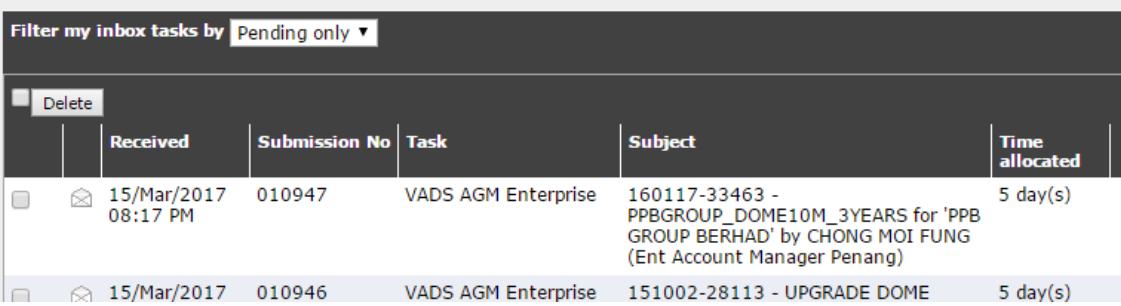


The screenshot shows a "Quotations" list interface. It includes sections for "MAPM Pricing Request Form" (PRF002) and "MAPM Quotations". The "MAPM Quotations" section displays the following data:

Quotation Ref No.	Quotation Status
VADS/ICT/180317/135/TAGM	Draft
VADS/ICT/150317/131/TAGM/1	Draft
VADS/ICT/150317/131/TAGM	Approved

11) Action button Function

a. Return to Inbox

	 The button Return to listing only can be seen when the Opportunity and Quotation in the View Mode
	<p>When the user click on the "Return to Listing" Action button, the system will display back the user's homepage as below;</p> <ul style="list-style-type: none">For Sales Specialist and Team Lead Sales Specialist, the system will displayed back the Search Opportunity page   <p>Or</p> <ul style="list-style-type: none">For Assistant General Manager, General Manager and Management Level, the system will displayed back the list of "My TaskBox" page. 

b. Edit



Edit

The button **Edit** only can be seen when the **Opportunity and Quotation** in the **View Mode**.

When the user click on the “**Edit**” action button, the Opportunity will be display;

- Opportunity
 - from **View Mode**



Opportunities

Opportunity ID 170318-53383

* Opportunity Name Bellfield Internet2

Opportunity Owner Name AELYA ZETTY ZAINAL KASSIM (VADS ICT Business Support)

* Search Account BELLA ADVANCE SDN BHD

Account Name BELLA ADVANCE SDN BHD

Account Category Enterprise

* Close Date 31/Mar/2017

SalesforceType

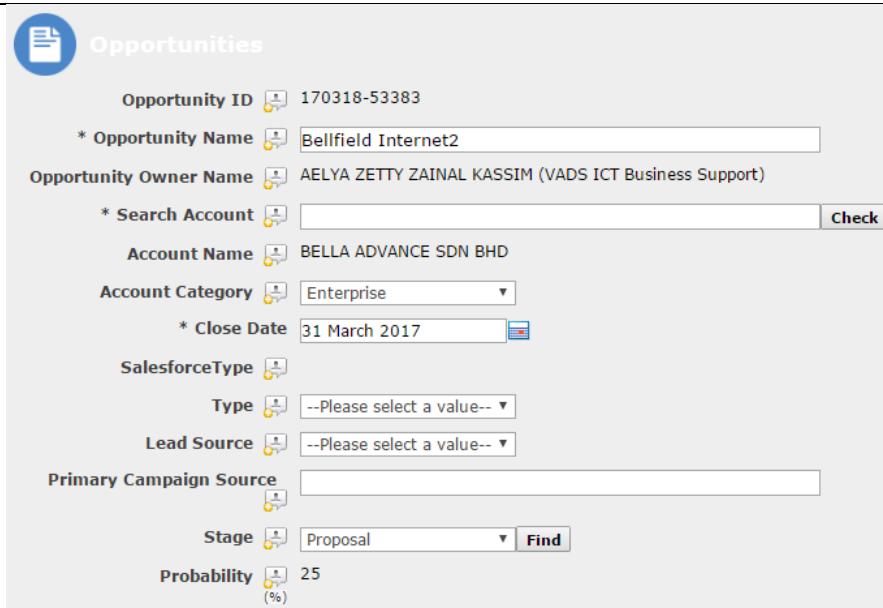
Type

Lead Source

Primary Campaign Source

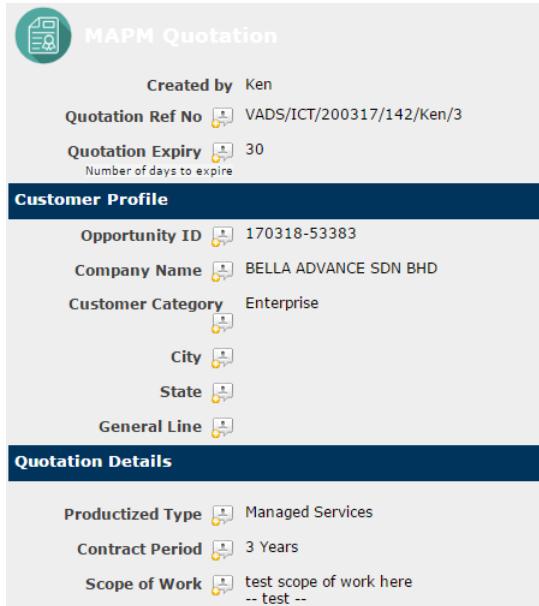
Stage Proposal

- to **Editable Mode**.



This screenshot shows the Opportunities form. It includes fields for Opportunity ID (170318-53383), Opportunity Name (Bellfield Internet2), Opportunity Owner Name (AELYA ZETTY ZAINAL KASSIM (VADS ICT Business Support)), Search Account (BELLA ADVANCE SDN BHD), Account Category (Enterprise), Close Date (31 March 2017), SalesforceType (Type - Please select a value--), Lead Source (Primary Campaign Source), Stage (Proposal), and Probability (25%). A 'Check' button is also present.

- Quotation
 - from ***View Mode***



This screenshot shows the MAPM Quotation view mode. It displays basic information like Created by (Ken), Quotation Ref No (VADS/ICT/200317/142/Ken/3), and Quotation Expiry (30 days). Below this, the Customer Profile section shows Opportunity ID (170318-53383), Company Name (BELLA ADVANCE SDN BHD), Customer Category (Enterprise), City, State, and General Line. The Quotation Details section shows Productized Type (Managed Services), Contract Period (3 Years), and Scope of Work (test scope of work here -- test --).

- to ***Editable Mode***.

	 MAPM Quotation Created by Ken Quotation Ref No <input type="text"/> VADS/ICT/200317/142/Ken/3 Quotation Expiry <input type="text"/> 30 Number of days to expire Customer Profile Opportunity ID <input type="text"/> 170318-53383 Company Name <input type="text"/> BELLA ADVANCE SDN BHD Customer Category <input type="text"/> Enterprise City <input type="text"/> State <input type="text"/> General Line <input type="text"/> Quotation Details Productized Type <input type="text"/> Managed Services Contract Period <input type="text"/> 3 Years Scope of Work <input type="text"/> test scope of work here -- test --	
--	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

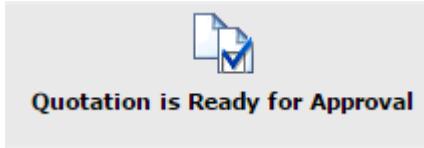
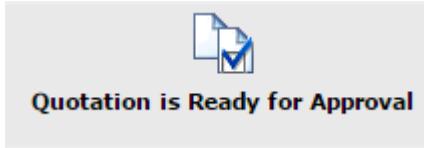
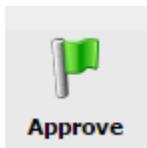
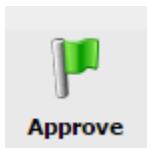
C. Quotation Created

	 Quotation Created The button only can be seen when the Opportunity in the View Mode , which at Quotation Creation step in the Opportunity Workflow .
--	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	After create the Quotation flow completed , the Assistance General Manager or the Sales Specialist Team Lead have to click on this button to Complete this Opportunity flow.
--	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

d. Product Selected

	 Product Selected The button only can be seen when the Quotation the View Mode , which at " SS Insert Product & Price " step in the Quotation Workflow
--	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	<p>After create Product and Price, the <i>Assigned Sales Specialist</i> have to click on this button for;</p> <ul style="list-style-type: none">• Managed Services <p>Submitter to review the quotation.</p> <ul style="list-style-type: none">• Outright Purchase <p>Product Owner to fill-in the product cost.</p>
	e. Quotation is ready for Approval
	 The button  only can be seen when the Opportunity in the View Mode , which at " Submitter Review Quote before Approval " step in the Quotation Workflow
	After submitter (Assistance General Manager or the Sales Specialist Team Lead) update or review the Quotation , the submitter have to click on this button to send the Quotation for Approval .
	f. Approve
	 The button  only can be seen when the Quotation the View Mode , which at " Approval " step in the Quotation Workflow <ul style="list-style-type: none">• Approval <p>After Approver review the Quotation, Approver has to click this button to move to next level of approval.</p>
	When the user click on the Approve button.

The system will display approve form as below;

Submit an action - 'Approve'
You can use this screen to submit your action

Signature
Your E-Signature is required

Choose File No file chosen

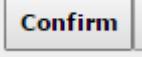
Name: General Manager
Timestamp: 17/Mar/2017 09:59 PM

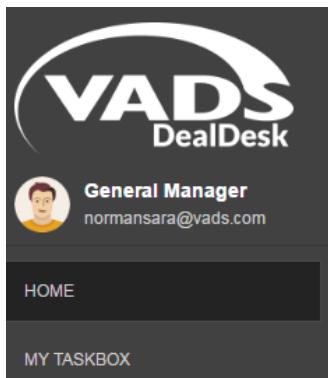
Digital Fingerprint
This ensures that the content of the submission is exactly the same as when it was submitted

 This submission, its data and uploaded file contents have been checked and verified to be untampered with.

Remarks
These remarks will be saved together with your action in the history area

- User can fill-in the below information”, and click on the “Confirm” button
 - Signature
 - Remarks(Optional)
- and click on the “Confirm” button;

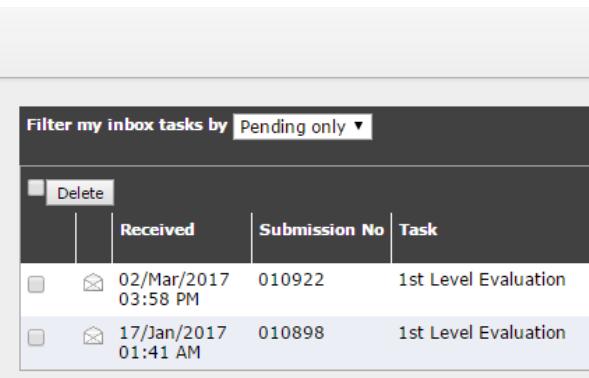
-  - system send the quotation to next level of approval and then system will display the home page



General Manager
normansara@vads.com

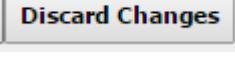
HOME

MY TASKBOX



Filter my inbox tasks by Pending only ▾

Delete	Received	Submission No	Task
<input type="checkbox"/>	02/Mar/2017 03:58 PM	010922	1st Level Evaluation
<input type="checkbox"/>	17/Jan/2017 01:41 AM	010898	1st Level Evaluation

-  - system cancel this form and display back to Quotation Details View Form

After user confirm approve, submitter can view the quotation from the “**My Submissions**” list.

Filter the submission list by **All**

Filter my submissions by All		
Date Started	Submission Number	
17/Mar/2017 05:09 PM	010962	1 P

Click on the Submission ID, the system will displayed the MAPM Quotation in View Mode.

02/Mar/2017 03:44 PM	010923	17/Mar/2017 02:43 PM	DC Productized Quotation Workflow	PENDING	Product Inserted
02/Mar/2017 03:35 PM	010922	17/Mar/2017 10:22 PM	MAPM Quotation Workflow	COMPLETED	Evaluation Completed
24/Feb/2017 07:24 AM	010911	24/Feb/2017 07:24 AM	MAPM Quotation Workflow	PENDING	Product Inserted

Under the **Submission Information** section, user can see the quotation status that already **Approved** by the approval as below;

Bubble	Date/time	Description
1st Level Evaluation	Sunday, November 13, 2016 2:27 AM	Action request sent to Tan Thiam Boon, Test EVP Sales, Woo Tuck Fu, Fermin Fautsch, Carol Wang, T LOBS GM, Norazam Jaafar, Normansara (v) Time allocated is 1 day(s)
Status = Pending	Sunday, November 13, 2016 2:27 AM	'Status = Pending' executed
1st Level Evaluation	Sunday, November 13, 2016 2:28 AM	Approved by Test EVP Sales
Quote is Approved	Sunday, November 13, 2016 2:28 AM	'Quote is Approved' executed
Stop	Sunday, November 13, 2016 2:28 AM	Workflow completed

g. Reject

 The button Reject only can be seen when the Quotation the View Mode , which at " Reject " step in the Quotation Workflow <ul style="list-style-type: none"> Reject After Approver review the Quotation, Approver has to click this button to workflow will stop and the Quotation Status will be change from Pending to Rejected .
When the user click on the Reject button. The system will display approve form as below;

Submit an action - 'Reject'
You can use this screen to submit your action

Signature
 Your E-Signature is required

Choose File No file chosen Upload

Name: General Manager
 Timestamp: 17/Mar/2017 10:01 PM

Digital Fingerprint
 This ensures that the content of the submission is exactly the same as when it was submitted

 This submission, its data and uploaded file contents have been checked and verified to be untampered with.

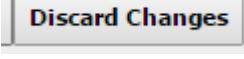
Remarks *
 These remarks will be saved together with your action in the history area

- User can fill-in the below information”, and click on the “Confirm” button
 - Signature
 - Remarks(Optional)
- and click on the “Confirm” button;

-  - system send the quotation to next level of approval and then system will display the home page

The screenshot shows the VADS DealDesk interface. On the left, there's a sidebar with a user profile for "General Manager" (normansara@vads.com) and links for "HOME" and "MY TASKBOX". The main area displays a list of tasks in an inbox. A filter bar at the top says "Filter my inbox tasks by Pending only". Below it is a table with columns: Delete, Received, Submission No, and Task.

Delete	Received	Submission No	Task
<input type="checkbox"/>	02/Mar/2017 03:58 PM	010922	1st Level Evaluation
<input type="checkbox"/>	17/Jan/2017 01:41 AM	010898	1st Level Evaluation

-  - system cancel this form and display back to Quotation Details View Form

The screenshot shows the VADS DealDesk application interface. On the left is a sidebar with navigation links: HOME, MY TASKBOX, MY SUBMISSIONS, MAPM CHARTS, and FORM TEMPLATES. The main area displays a quotation record. At the top right are several action buttons: Return to Inbox, Approve, Reject, Rework item, Seek Input, Post a message, and Workflow Status. Below these are sections for 'MAPM Quotation' (Created by: Test AGM, Quotation Ref No: VADS/ICT/161216/099/TAGM, Quotation Expiry: 30 days), 'Customer Profile' (Opportunity ID: 160406-38766, Company Name: SYARIKAT PERLANTING JERNEH PLANTATION SD, Customer Category: Enterprise, City, State, General Line), and 'Quotation Details'.

After user confirm approve, submitter can view the quotation from the “**My Submissions**” list.

Filter the submission list by **All**

Filter my submissions by All		
Date Started	Submission Number	
17/Mar/2017 05:09 PM	010962	P

Click on the Submission ID, the system will displayed the MAPM Quotation in View Mode.

Date Started	Submission Number	Last Modified Date	Last Modified By	Status	Product Inserted
02/Mar/2017 03:44 PM	010923	17/Mar/2017 02:43 PM	DC Productized Quotation Workflow	PENDING	Product Inserted
02/Mar/2017 03:35 PM	010922	17/Mar/2017 10:22 PM	MAPM Quotation Workflow	COMPLETED	Evaluation Completed
24/Feb/2017 07:24 AM	010911	24/Feb/2017 07:24 AM	MAPM Quotation Workflow	PENDING	Product Inserted

Under the **Submission Information** section, user can see the quotation status that already Rejected by the approval as below;

Bubble	Date/time	Description
Start	Sunday, November 13, 2016 2:39 AM	Submitted to workflow
1st Level Evaluation	Sunday, November 13, 2016 2:39 AM	Action request sent to Tan Thiam Boon, Test EVP Sales, Woo Tuck Fu, Fermin Fautsch, Carol Wang, T LOBS GM, Norazam Jaafar, Normansara 🕒 Time allocated is 1 day(s)
Status = Pending	Sunday, November 13, 2016 2:39 AM	'Status = Pending' executed
1st Level Evaluation	Sunday, November 13, 2016 2:42 AM	Rejected by Test EVP Sales
Quote is Rejected	Sunday, November 13, 2016 2:42 AM	'Quote is Rejected' executed
Stop	Sunday, November 13, 2016 2:42 AM	Workflow completed

h. PS Applied

 Update Internal Support	The button Update Internal Support only can be seen when the Quotation the View Mode , which at “ VADS PM Presales ” step in the Quotation Workflow
---------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	After Sales Specialist fill-in the quotation, PM PreSales user have to click on this button for submitter to review the quotation.
--	------------------------------------------------------------------------------------------------------------------------------------

i. Pricing Accepted

 Pricing Accepted	The button Pricing Accepted only can be seen when the Opportunity in the View Mode , which at “ SS Ask Price ” step in the Quotation Workflow
----------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	After quotation cost and price has been accepted by Sales Specialist, he/she have to click on this button for submitter to review the quotation.
--	--------------------------------------------------------------------------------------------------------------------------------------------------

<p>j. Reassign</p>		
		<p>The button Reassign only can be seen when the Opportunity in the View Mode</p>
		<ul style="list-style-type: none"> • The Assignor (The assignor transfers to the assinee)
		<p>When user click on this “Reassign” action button, the system will display below action box.</p> <div style="border: 1px solid #ccc; padding: 10px; width: fit-content; margin: auto;"> <p>Reassign a task You can use this screen to reassign as task to someone else</p> <p>Reassign this task to* <input type="text" value="--Please pick a user below--"/> <input type="button" value="Find a user"/></p> <p>Reassignment Remarks These remarks will be sent together with the reassigned task to the selected user</p> <div style="border: 1px solid #ccc; height: 100px; margin-top: 10px;"></div> <p style="margin-top: 10px;"><input type="button" value="Confirm"/> <input type="button" value="Discard Changes"/></p> </div> <p>User need to select the person that he/she want to reassign the opportunity, Click on the “Reassign this task to” drop down list to list all the User name or</p> <p>Click on the <input type="button" value="Find a user"/> button to filter the User name. User can key-in the name in the Reassign this task to* <input type="text"/> <input type="button" value="Find"/> field and click on the “Find” button</p> <p>After select the username, enter the “Remarks to user” field so that the selected user know their task , then click on the</p> <div style="display: flex; align-items: center;"> <input type="button" value="Confirm"/> - To Submit the Opportunity to the Selected user in the “Reassign this task to” drop down list </div> <div style="display: flex; align-items: center;"> <input type="button" value="Discard Changes"/> - To Cancel the Reassign and the system display the opportunity details view form. </div>

After click on the “**Confirm**” button, the system will display the List of “My Taskbox”.
The Opportunity name has been remove from the list (**the selected reassign user need to complete the task to proceed workflow**)

The screenshot shows a list of tasks in a dark-themed interface. At the top, there is a filter bar with the text "Filter my inbox tasks by Pending only ▾". Below the filter is a header row with columns: Received, Submission No, Task, and Subject. A "Delete" button is located at the top left of the list area. The first task listed is:

<input type="checkbox"/>	15/Mar/2017 08:16 PM	010946	VADS AGM Enterprise	151002-28113 - UPGRADE DOME 10Mbps for 'SPECIFIC RESOURCES SDN BHD' by AZMAN BIN MUHAMAT NOR (Ent Account Manager Pahang)
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The user can see the task already been send at the “Submission Information” section in the Opportunity details form,

The screenshot shows the Opportunity details form. In the "Submission Information" section, it displays:

- Submission No: 010951
- Submitted By: Team lead SS
- Date Received: 16/Mar/2017 04:14 PM

In the "History" section, it shows the following workflow steps:

History	Bubble	Date/time	Description	Remarks
	Start	16/Mar/2017 04:14 PM	Submitted to workflow	
	VADS AGM Enterprise	16/Mar/2017 04:14 PM	Action request sent to Ken, Mohd Khairi Bin Lamsah, Nasrul Rizal Bin Abdul Rasid, Normansara, Team lead SS, Test AGM ⌚ Time allocated is 5 day(s)	
	VADS AGM Enterprise	16/Mar/2017 04:15 PM	Test AGM has sent this item to Sales Specialist for correction	rework items

- **The Assignee**

The selected user can see the notification on their,

- **Welcome page**

Start



160117-33463 - PPBGROUP_DOME10M_3YEARS
for 'PPB GROUP BERHAD' by CHONG MOI FUNG
(Ent Account Manager Penang)
16/Mar/2017 04:14 PM By Team lead SS

- **My TaskBox**

Filter my inbox tasks by Pending only ▾					
Show inbox items for the following user:					
Normansara		Find a user			
<input type="checkbox"/> Delete	Received	Submission No	Task	Subject	Time allocated
<input type="checkbox"/>	✉ 15/Mar/2017 08:17 PM	010947	VADS AGM Enterprise	160117-33463 - PPBGROUP_DOME10M_3YEARS for 'PPB GROUP BERHAD' by CHONG MOI FUNG (Ent Account Manager Penang)	5 day(s)

To review or edit the opportunity, click on the Seek Input link as below.

15/Mar/2017 010947 08:17 PM VADS AGM Enterprise 160117-33463 - PPBGROUP_DOME10M_3YEARS for 'PPB GROUP BERHAD' by CHONG MOI FUNG (Ent Account Manager Penang) 5 day(s)

The system will displayed the Opportunity Details Form View as below;

							
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Opportunities

Opportunity ID	 160117-33463
* Opportunity Name	 PPBGROUP_DOME10M_3YEARS
Opportunity Owner Name	 CHONG MOI FUNG (Ent Account Manager Penang)
* Search Account	 PPB GROUP BERHAD
Account Name	 PPB GROUP BERHAD
Account Category	 Enterprise
* Close Date	 16/Nov/2016
SalesforceType	 New Sales
Type	
Lead Source	
Primary Campaign Source	
Stage	 Proposal
Probability	 25

Click on the “**Edit**” Action button and the system will displayed Opportunity from View Mode to **Edit Mode**.



Opportunities

Opportunity ID * Opportunity Name

Opportunity Owner Name

* Search Account

Account Name

Account Category *

* Close Date

SalesforceType

Type

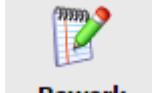
Lead Source

Primary Campaign Source

Stage

From here the user can follow the Opportunity and Create Quotation process workflow.

k. Rework Item



The button **Rework item** only can be seen when the **Opportunity** in the **View Mode**

Rework item is similar to Seek Input but the different is when the user rework the item, the **user cannot proceed to next step until the selected user complete their task.**

- The Submitter

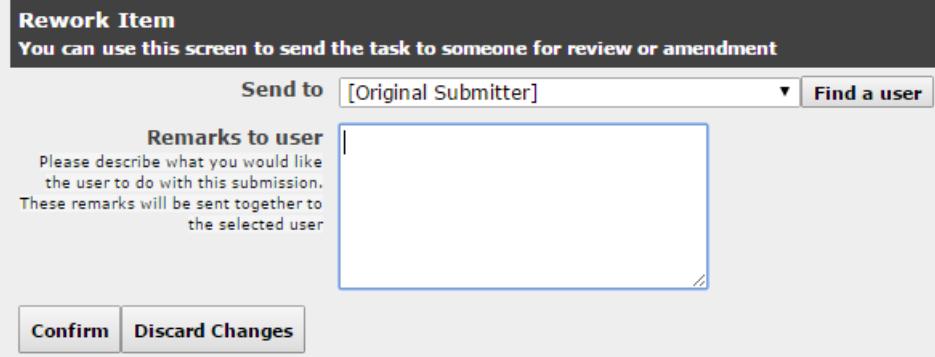
When user click on this “**Rework Item**” action button, the system will display below action box.

Rework Item
You can use this screen to send the task to someone for review or amendment

Send to [Original Submitter] **Find a user**

Remarks to user
Please describe what you would like the user to do with this submission.
These remarks will be sent together to the selected user

Confirm **Discard Changes**



User need to select the person that he/she want to rework the item,
Click on the “**Send To**” drop down list

Send to [Original Submitter] **Find a user** to list all the User name

or

Click on the “**Find a User**” button **Find a user** to search the User name. User can key-in the name **Send to** **Find** and click on the “**Find**” button

After select the username, enter the “Remarks to user” field so that the selected user know their task , then click on the

Confirm - to Submit the Message

Discard Changes - to Cancel the Message

After click on the submit button, the system will display

- “My Taskbox” list

	<div style="border: 1px solid #ccc; padding: 10px;"> <p>Filter my inbox tasks by All tasks ▾</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th style="width: 10%;"></th> <th style="width: 15%;">Received</th> <th style="width: 15%;">Submission No</th> <th style="width: 30%;">Task</th> <th style="width: 20%;">Subject</th> <th style="width: 15%;">Time allocated</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>20/Mar/2017 11:31 AM</td> <td>010989</td> <td>Submitter Review Quote before Approval</td> <td>Bellfield Internet2 for BELLA ADVANCE SDN BHD</td> <td>24 hour(s)</td> </tr> <tr> <td><input type="checkbox"/></td> <td>20/Mar/2017 10:42 AM</td> <td>010988</td> <td>Submitter Review Quote before Approval</td> <td>Bellfield Internet2 for BELLA ADVANCE SDN BHD</td> <td>24 hour(s)</td> </tr> <tr> <td><input type="checkbox"/></td> <td>18/Mar/2017 10:54 PM</td> <td>010967</td> <td>VADS AGM Enterprise</td> <td>170318-53383 - Bellfield Internet2 for 'BELLA ADVANCE SDN BHD' by AELYA ZETTY ZAINAL KASSIM (VADS ICT Business Support)</td> <td>5 day(s)</td> </tr> </tbody> </table> </div> <p>The user can see the task already been send at the “Submission Information” section,</p> <div style="background-color: #f2f2f2; padding: 5px;"> <p>Submission No. 010951 Submitted By Team lead SS Date Received 16/Mar/2017 04:14 PM</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>History</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th style="width: 10%;">Bubble</th> <th style="width: 30%;">Date/time</th> <th style="width: 40%;">Description</th> <th style="width: 20%;">Remarks</th> </tr> </thead> <tbody> <tr> <td></td> <td>16/Mar/2017 04:14 PM</td> <td>Submitted to workflow</td> <td></td> </tr> <tr> <td></td> <td>16/Mar/2017 04:14 PM</td> <td>Action request sent to Ken, Mohd Khairi Bin Lamsah, Nasrul Rizal Bin Abdul Rasid, Normansara, Team lead SS, Test AGM ⌚ Time allocated is 5 day(s)</td> <td></td> </tr> <tr> <td></td> <td>16/Mar/2017 04:15 PM</td> <td>Test AGM has sent this item to Sales Specialist for correction</td> <td>rework items</td> </tr> </tbody> </table> </div> <ul style="list-style-type: none"> ● The Receiver <p>The selected user can see the notification on their,</p> <ul style="list-style-type: none"> ● Welcome page <div style="background-color: #ff6347; color: white; text-align: center; padding: 10px; border-radius: 10px;"> <p style="margin: 0;">Start</p> </div> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 20px;"> <p> 160117-33463 - PPBGROUP_DOME10M_3YEARS for 'PPB GROUP BERHAD' by CHONG MOI FUNG (Ent Account Manager Penang) 16/Mar/2017 04:08 PM By Test AGM</p> </div> <ul style="list-style-type: none"> ● My TaskBox 		Received	Submission No	Task	Subject	Time allocated	<input type="checkbox"/>	20/Mar/2017 11:31 AM	010989	Submitter Review Quote before Approval	Bellfield Internet2 for BELLA ADVANCE SDN BHD	24 hour(s)	<input type="checkbox"/>	20/Mar/2017 10:42 AM	010988	Submitter Review Quote before Approval	Bellfield Internet2 for BELLA ADVANCE SDN BHD	24 hour(s)	<input type="checkbox"/>	18/Mar/2017 10:54 PM	010967	VADS AGM Enterprise	170318-53383 - Bellfield Internet2 for 'BELLA ADVANCE SDN BHD' by AELYA ZETTY ZAINAL KASSIM (VADS ICT Business Support)	5 day(s)	Bubble	Date/time	Description	Remarks		16/Mar/2017 04:14 PM	Submitted to workflow			16/Mar/2017 04:14 PM	Action request sent to Ken, Mohd Khairi Bin Lamsah, Nasrul Rizal Bin Abdul Rasid, Normansara, Team lead SS, Test AGM ⌚ Time allocated is 5 day(s)			16/Mar/2017 04:15 PM	Test AGM has sent this item to Sales Specialist for correction	rework items	
	Received	Submission No	Task	Subject	Time allocated																																					
<input type="checkbox"/>	20/Mar/2017 11:31 AM	010989	Submitter Review Quote before Approval	Bellfield Internet2 for BELLA ADVANCE SDN BHD	24 hour(s)																																					
<input type="checkbox"/>	20/Mar/2017 10:42 AM	010988	Submitter Review Quote before Approval	Bellfield Internet2 for BELLA ADVANCE SDN BHD	24 hour(s)																																					
<input type="checkbox"/>	18/Mar/2017 10:54 PM	010967	VADS AGM Enterprise	170318-53383 - Bellfield Internet2 for 'BELLA ADVANCE SDN BHD' by AELYA ZETTY ZAINAL KASSIM (VADS ICT Business Support)	5 day(s)																																					
Bubble	Date/time	Description	Remarks																																							
	16/Mar/2017 04:14 PM	Submitted to workflow																																								
	16/Mar/2017 04:14 PM	Action request sent to Ken, Mohd Khairi Bin Lamsah, Nasrul Rizal Bin Abdul Rasid, Normansara, Team lead SS, Test AGM ⌚ Time allocated is 5 day(s)																																								
	16/Mar/2017 04:15 PM	Test AGM has sent this item to Sales Specialist for correction	rework items																																							

Filter my inbox tasks by Pending only ▾

Show inbox items for the following user:
Normansara ▾ Find a user

	Received	Submission No	Task	Subject	Time allocated
<input type="checkbox"/>  15/Mar/2017 08:17 PM	010947	VADS AGM Enterprise	160117-33463 - PPBGROUP_DOME10M_3YEARS for 'PPB GROUP BERHAD' by CHONG MOI FUNG (Ent Account Manager Penang)	5 day(s)	

To review or edit the opportunity, click on the Seek Input link as below.

15/Mar/2017 010947 08:17 PM VADS AGM Enterprise 160117-33463 - PPBGROUP_DOME10M_3YEARS for 'PPB GROUP BERHAD' by CHONG MOI FUNG (Ent Account Manager Penang) 5 day(s)

The system will displayed the Opportunity Details Form View as below;



Opportunities

Opportunity ID	 160227-35495
* Opportunity Name	 CP project Janda Baik PHG
Opportunity Owner Name	 AZMAN BIN MUHAMAT NOR (Ent Account Manager Pahang)
* Search Account	 SAMUDRA ENGINEERS SDN BHD
Account Name	 SAMUDRA ENGINEERS SDN BHD
Account Category	 Enterprise
* Close Date	01/Nov/2016
SalesforceType	 New Sales

Click on the “**Edit**” Action button and the system will displayed Opportunity from View Mode to **Edit Mode**.



Opportunities

Opportunity ID 160227-35495

* Opportunity Name

Opportunity Owner Name

* Search Account

Account Name

Account Category

* Close Date

SalesforceType

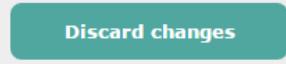
Type

Lead Source

Primary Campaign Source

Stage

After done editing or review, go to the bottom of the page.

**Save****Discard changes****Done**

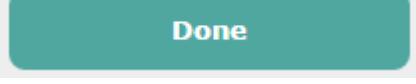
Click on the button

**Save**

- To save the form and back to the view mode

**Discard changes**

- To cancel the changes and back to the edit mode

**Done**

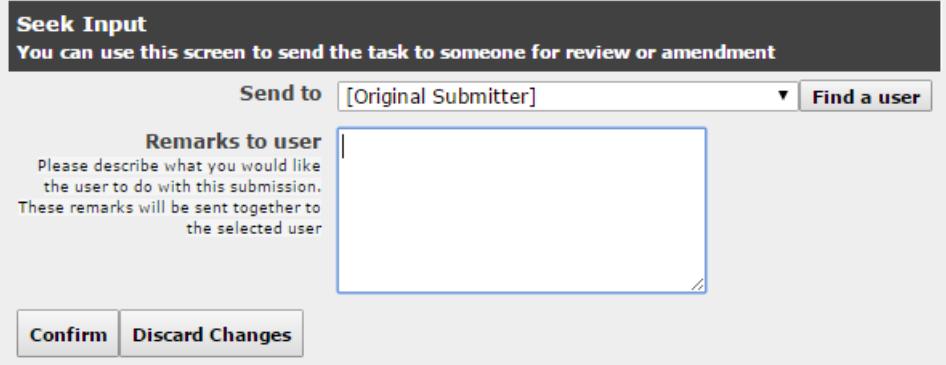
- To save and complete task, the opportunity will be send back to the sender.

I. Seek Input



The button  only can be seen when the **Opportunity** in the **View Mode**.

Seek Input is similar to Rework item but the different is when the user seek for input, the **user can proceed to next step without the selected user complete their task**.

	<ul style="list-style-type: none">• The Submitter
	<p>When user click on this “Seek Input” action button, the system will display below action box.</p>  <p>User need to select the person that he/she want to seek input from, Click on the “Send To” drop down list</p> <p>Send to [Original Submitter] <input type="button" value="▼"/> to list all the User name or</p> <p>Click on the “Find a User” button <input type="button" value="Find a user"/> to search the User name. User can key-in the name <input type="text"/> <input type="button" value="Find"/> and click on the “Find” button</p> <p>After select the username, enter the “Remarks to user” field so that the selected user know their task , then click on the</p> <p><input type="button" value="Confirm"/> - to Submit the Message</p> <p><input type="button" value="Discard Changes"/> - to Cancel the Message</p>

After click on the submit button, the system will display the List of “My TaskBox”.

Filter my inbox tasks by Pending only ▾				
<input type="checkbox"/> Delete	Received	Submission No	Task	Subject
<input type="checkbox"/>	✉ 16/Mar/2017 04:14 PM	010951	VADS AGM Enterprise	160117-33463 - PPBGROUP_DOME10M_3YEARS for 'PPB GROUP BERHAD' by CHONG MOI FUNG (Ent Account Manager Penang)
<input type="checkbox"/>	✉ 15/Mar/2017 08:16 PM	010946	VADS AGM Enterprise	151002-28113 - UPGRADE DOME 10mhns for 'SPECTIFIC RESOURCES SDN

The user can see the task already been send at the “Submission Information” section,

Submission No. 010942																				
Submitted By Test AGM																				
Date Received 16/Mar/2017 12:00 PM																				
History																				
<table border="1"> <thead> <tr> <th>Bubble</th> <th>Date/time</th> <th>Description</th> <th>Remarks</th> </tr> </thead> <tbody> <tr> <td>Start</td> <td>15/Mar/2017 12:34 PM</td> <td>Submitted to workflow</td> <td></td> </tr> <tr> <td>VADS AGM Enterprise</td> <td>15/Mar/2017 12:34 PM</td> <td>Action request sent to Ken, Mohd Khairi Bin Lamsah, Nasrul Rizal Bin Abdul Rasid, Normansara, Team lead SS, Test AGM ⌚ Time allocated is 5 day(s)</td> <td></td> </tr> <tr> <td>Test AGM</td> <td>16/Mar/2017 11:51 AM</td> <td>test post a message Post a reply</td> <td></td> </tr> <tr> <td>VADS AGM Enterprise</td> <td>16/Mar/2017 12:00 PM</td> <td>Test AGM has sent his/her task to Sales Specialist for input test to seek input</td> <td style="border: 2px solid red;">test to seek input</td> </tr> </tbody> </table>	Bubble	Date/time	Description	Remarks	Start	15/Mar/2017 12:34 PM	Submitted to workflow		VADS AGM Enterprise	15/Mar/2017 12:34 PM	Action request sent to Ken, Mohd Khairi Bin Lamsah, Nasrul Rizal Bin Abdul Rasid, Normansara, Team lead SS, Test AGM ⌚ Time allocated is 5 day(s)		Test AGM	16/Mar/2017 11:51 AM	test post a message Post a reply		VADS AGM Enterprise	16/Mar/2017 12:00 PM	Test AGM has sent his/her task to Sales Specialist for input test to seek input	test to seek input
Bubble	Date/time	Description	Remarks																	
Start	15/Mar/2017 12:34 PM	Submitted to workflow																		
VADS AGM Enterprise	15/Mar/2017 12:34 PM	Action request sent to Ken, Mohd Khairi Bin Lamsah, Nasrul Rizal Bin Abdul Rasid, Normansara, Team lead SS, Test AGM ⌚ Time allocated is 5 day(s)																		
Test AGM	16/Mar/2017 11:51 AM	test post a message Post a reply																		
VADS AGM Enterprise	16/Mar/2017 12:00 PM	Test AGM has sent his/her task to Sales Specialist for input test to seek input	test to seek input																	

- **The Receiver**

The selected user can see the notification on their,

- **Welcome page**

Start



Your input was requested
16/Mar/2017 12:00 PM By Test AGM

- **My TaskBox**

Filter my inbox tasks by Pending only ▾				
<input type="checkbox"/> Delete	Received	Submission No	Task	Subject
				Time allocated
<input type="checkbox"/>	✉ 16/Mar/2017 12:00 PM	10942	Seek Input	Your input was requested No deadline
<input type="checkbox"/>	✉ 16/Mar/2017 12:00 PM	010927	SS Insert Product R...	MANAGED WiFi (WIFI) for PREMIUM 24 hours(s)

To review or edit the opportunity, click on the Seek Input link as below.

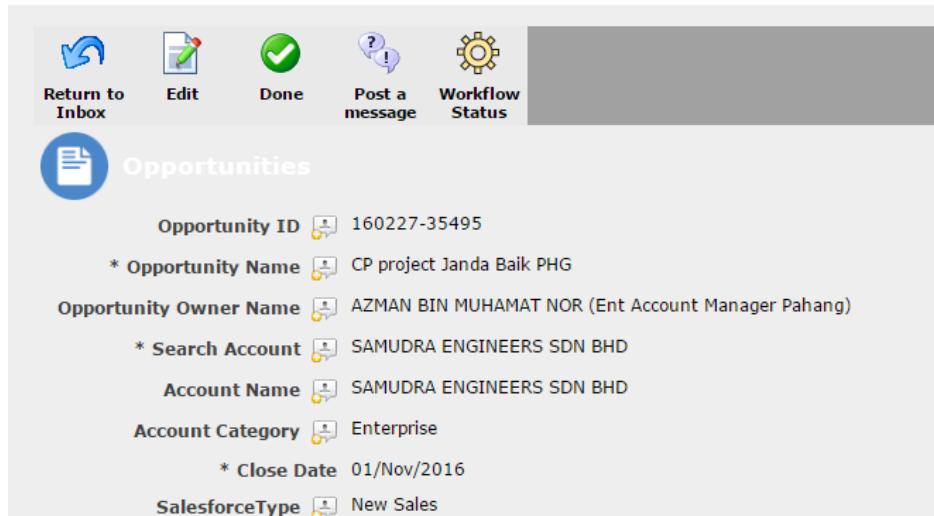
16/Mar/2017 10942
12:00 PM

Seek Input

Your input was requested

No
deadline

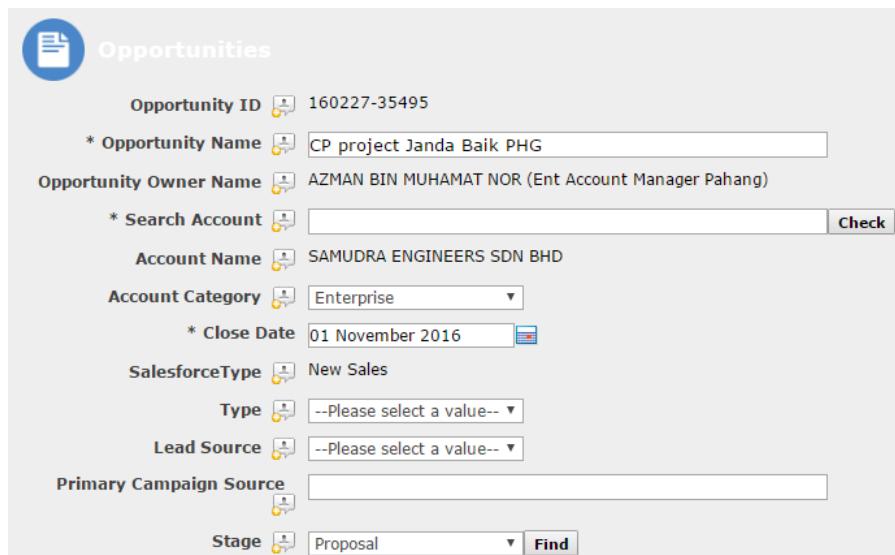
The system will displayed the Opportunity Details Form View as below;



The screenshot shows the 'Opportunities' details form. At the top, there are five buttons: 'Return to Inbox' (blue arrow icon), 'Edit' (pencil icon), 'Done' (green checkmark icon), 'Post a message' (speech bubble icon), and 'Workflow Status' (gear icon). Below the buttons, the title 'Opportunities' is displayed in a blue circle. The form contains the following fields:

Opportunity ID	160227-35495
* Opportunity Name	CP project Janda Baik PHG
Opportunity Owner Name	AZMAN BIN MUHAMAT NOR (Ent Account Manager Pahang)
* Search Account	SAMUDRA ENGINEERS SDN BHD
Account Name	SAMUDRA ENGINEERS SDN BHD
Account Category	Enterprise
* Close Date	01/Nov/2016
SalesforceType	New Sales

Click on the “**Edit**” Action button and the system will displayed Opportunity from View Mode to **Edit Mode**.



The screenshot shows the 'Opportunities' details form in edit mode. The 'Edit' button from the previous view has been clicked, changing the interface to allow modification of the data. The fields are now interactive:

Opportunity ID	160227-35495
* Opportunity Name	CP project Janda Baik PHG
Opportunity Owner Name	AZMAN BIN MUHAMAT NOR (Ent Account Manager Pahang)
* Search Account	<input type="text"/> <input type="button" value="Check"/>
Account Name	SAMUDRA ENGINEERS SDN BHD
Account Category	Enterprise
* Close Date	01 November 2016 <input type="button" value="Calendar"/>
SalesforceType	New Sales
Type	--Please select a value-- <input type="button" value="Down"/>
Lead Source	--Please select a value-- <input type="button" value="Down"/>
Primary Campaign Source	<input type="text"/>
Stage	Proposal <input type="button" value="Find"/>

For BCAPM role, user have to update the BCAPM Section as below;

	<p>BCAPM Section</p> <p>Recommended Price <input type="text"/></p> <p>Pricing Justification <input type="text"/> </p> <p>Floor Price <input type="text"/></p> <p>Pricing Condition <input type="text"/> </p> <p>Save Discard changes Done</p>
	<p>After done editing or review, go to the bottom of the page.</p> <p>Save Discard changes Done</p> <p>Click on the button</p> <p>Save - to save the form and back to the view mode</p> <p>Discard changes - to cancel the changes and back to the view mode</p> <p>Done - to save and complete task.</p>

m. Post a Message

	 The button Post a message only can be seen when the Opportunity in the View Mode
	When user click on this " Post a Message " action button, the system will display below action box.

Post a message

You can use this screen to post a message

Message

Please specify the message you would like to post. Please take note that all posted messages will be publicly viewable

All workflow participants will also be notified by e-mail automatically

Post message**Discard Changes**

User need to enter the message to be posted in the Message field, then click on the

Post message

- to Submit the Message

Discard Changes

- to Cancel the Message

The message will be displayed on the “**Submission Information**” section at the *bottom of the Opportunity Details View Form* as below;

Before Post a Message**Submission information**
The following is information related to this particular submission

Submission No. 010942
Submitted By Test AGM
Date Received 15/Mar/2017 12:34 PM

History

Bubble	Date/time	Description	Remarks
Start	15/Mar/2017 12:34 PM	Submitted to workflow	
VADS AGM Enterprise	15/Mar/2017 12:34 PM	Action request sent to Ken, Mohd Khairi Bin Lamsah, Nasrul Rizal Bin Abdul Rasid, Normansara, Team lead SS, Test AGM ⌚ Time allocated is 5 day(s)	

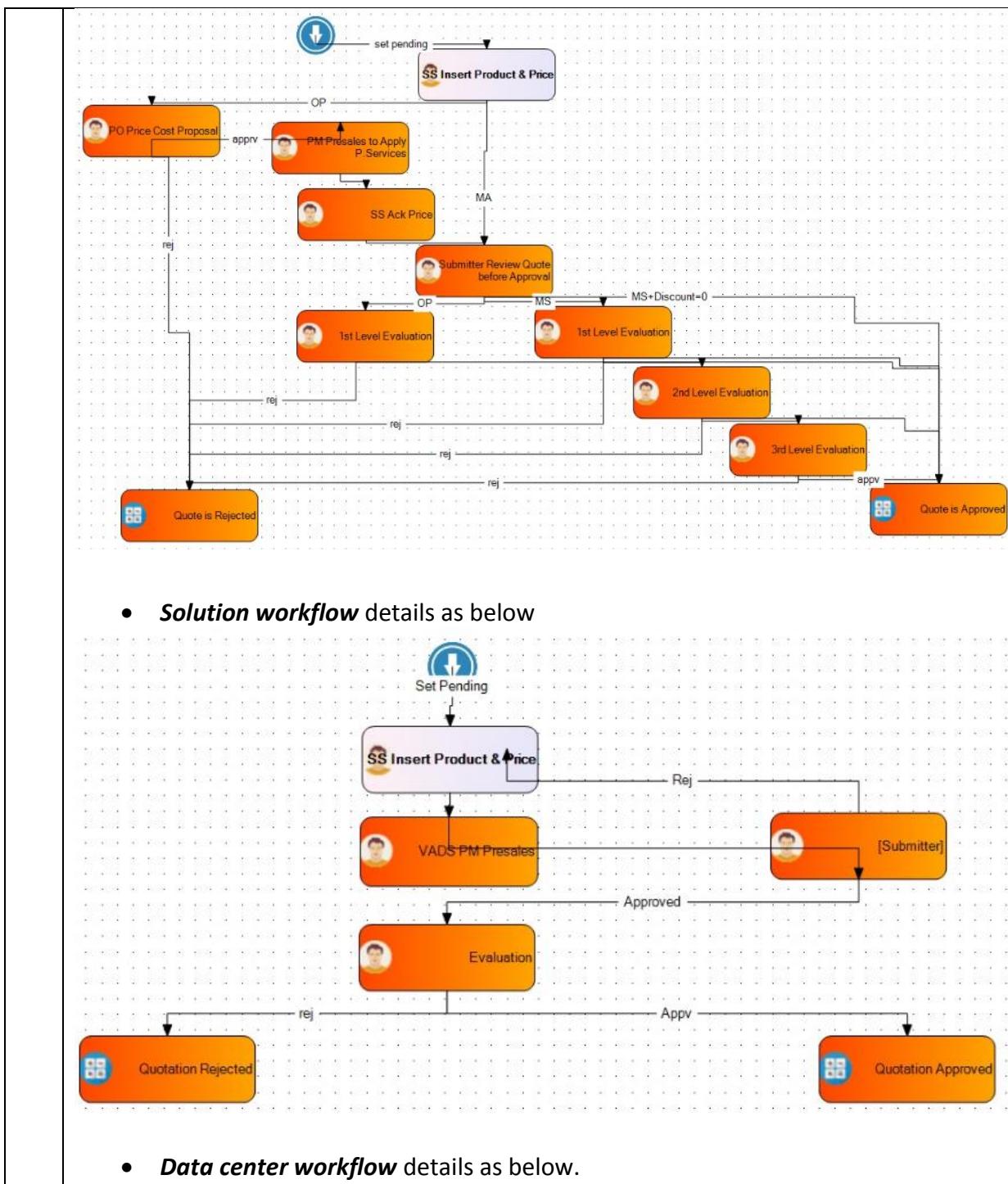
After Post a Message

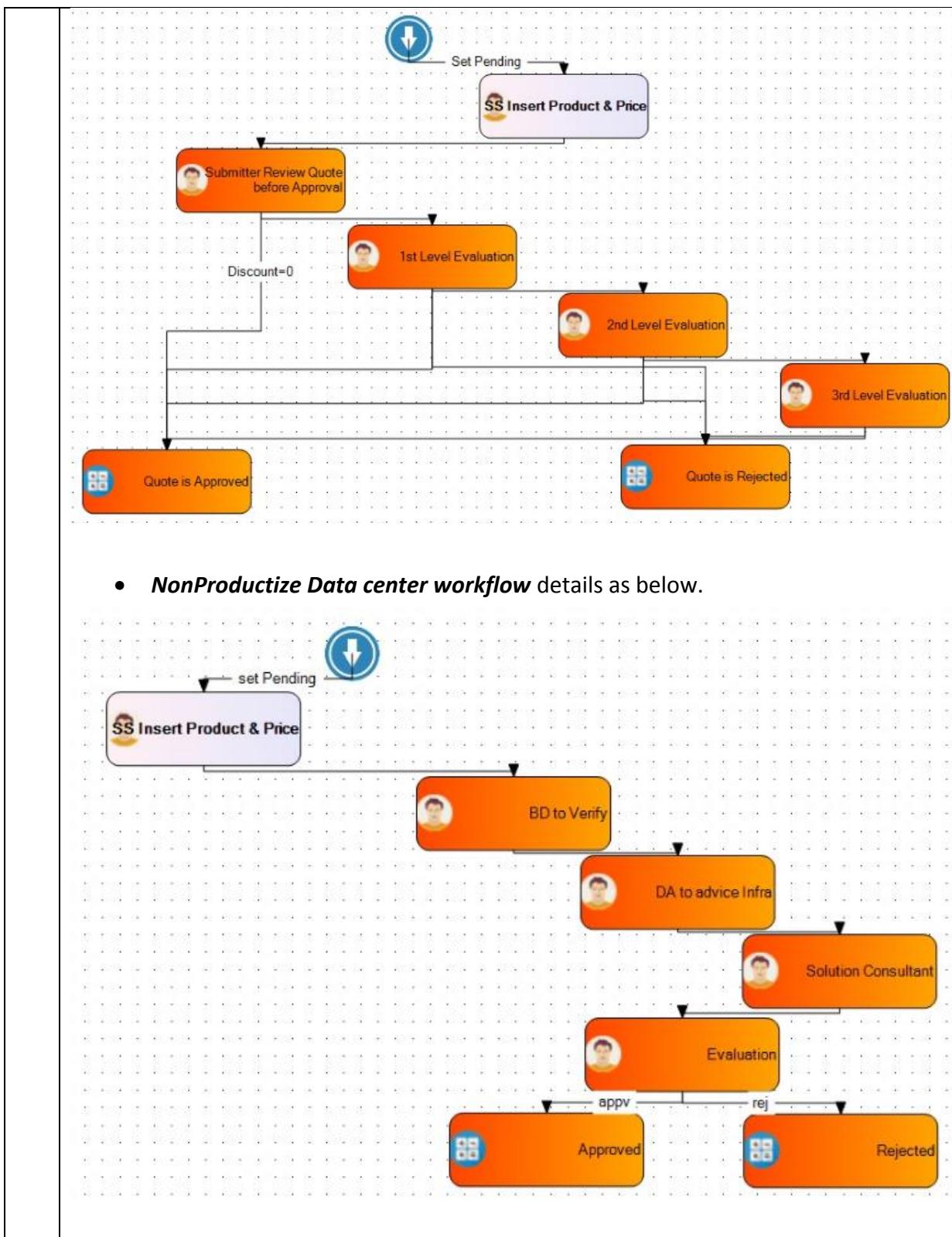
Submission information <small>The following is information related to this particular submission</small>																	
Submission No.	010942																
Submitted By	Test AGM																
Date Received	15/Mar/2017 12:34 PM																
History <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Bubble</th><th>Date/time</th><th>Description</th><th>Remarks</th></tr> </thead> <tbody> <tr> <td>⌚ Start</td><td>15/Mar/2017 12:34 PM</td><td>Submitted to workflow</td><td></td></tr> <tr> <td>👤 VADS AGM Enterprise</td><td>15/Mar/2017 12:34 PM</td><td>Action request sent to Ken, Mohd Khairi Bin Lamsah, Nasrul Rizal Bin Abdul Rasid, Normansara, Team lead SS, Test AGM ⌚ Time allocated is 5 day(s)</td><td></td></tr> <tr> <td>👤 Test AGM</td><td>16/Mar/2017 11:51 AM</td><td>test post a message Post a reply</td><td></td></tr> </tbody> </table>		Bubble	Date/time	Description	Remarks	⌚ Start	15/Mar/2017 12:34 PM	Submitted to workflow		👤 VADS AGM Enterprise	15/Mar/2017 12:34 PM	Action request sent to Ken, Mohd Khairi Bin Lamsah, Nasrul Rizal Bin Abdul Rasid, Normansara, Team lead SS, Test AGM ⌚ Time allocated is 5 day(s)		👤 Test AGM	16/Mar/2017 11:51 AM	test post a message Post a reply	
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👤 Test AGM	16/Mar/2017 11:51 AM	test post a message Post a reply															

n. Workflow Status

 Workflow Status	The button Workflow Status only can be seen when the Opportunity in the View Mode
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	<p>If the user click on this “Workflow Status” action button, the system will display</p> <ul style="list-style-type: none"> • Opportunity workflow details as below. <pre> graph TD A[VADS AGM Enterprise] -- "25% Enterprise" --> B[VADS AGM Government] B -- "100%" --> C[75% Negotiation] C -- "75% Govt" --> D[100% notify PMO] C -- "75% Ent" --> E[75% Negotiation] </pre> <ul style="list-style-type: none"> • MAPM workflow details as below.
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[Return to task page](#)

User can go back to the Details View Form by click on the button on top of the page. action