



Assigned Clients Records

Project Name	Contact Period	Number of Calls Left	Follow up Date
Assign20131229	29/12/2013 - 01/12/2013	5	

Assigned Leads Records

Project Name	Contact Period	Number of Calls Left	Follow up Date
LeadAssign	27/12/2013 - 05/12/2013	2	

Commission Earned

Name (job title)	Age	Nickname	Employee
Giacomo Guilizzoni Founder & CEO	37	Peldi	<input type="radio"/>
Marco Botton Tuttofare	34		<input checked="" type="checkbox"/>
Mariah Maclachlan Better Half	37	Patata	<input type="checkbox"/>



http://



User

Role

[Main Menu](#)

No	Function	Create	Modify	View	Delete
1	Access Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Client Assignment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Client Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Assignment Report	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

A/C NRIC

Assigned Date

Choose Project

[illegible]

[Main Menu](#)

- Filter

Search Team Popup

Account Service Type

- ☐ Cash Trading
☐ CFD
☐ Custodian
☒ Cash Management
☐ Phillip Margin
☐ Phillip Financial
☒ Discretionary Account
☐ Unit Trust Non Wrap

- Account

Account Number 000001

From Date

/ /



To Date

// //



Cut Off Date

e //



Project Info

Project Name

Project Objective

Select file to upload

[Upload Image](#)

Fund.

- ☐ MMF
- ☐ In Trust Account \$
- ☐ No Trade for > mth
- ☐ Stock Market Value > \$

— Status

- ☐
- Unassigned
- ☐
- Mth

Status

- ☐ not in use
☐ Unanswered
☐ Wrong Number
☐ Rescheduled

— Contact Mode —

- ☐ Email
- ☐ Mobile
-
- Auto Assign

File Name

Testing Project

Remove

Preview

Search

Save

[illegible]



http://SPMPhase4/MainMenu.aspx



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[Access](#)

[Assignment](#)

[Contact](#)

[Report](#)





http://SPMPhase4/MainMenu.aspx



[Setup](#)

[Access](#)

[Assignment](#)

[Contact](#)

[Report](#)



Access Management



Role Management





http://SPMPhase4/MainMenu.aspx



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[Report](#)



Dealer Management



Lead Management



Core Client Management



Email Template Management



http://SPMPhase4/MainMenu.aspx



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[Access](#)

[Assignment](#)

[Contact](#)

[Report](#)



Client Assignment



Lead Assignment





http://SPMPhase4/MainMenu.aspx



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[Report](#)



Client Contact



Lead Contact





http://SPMPhase4/MainMenu.aspx



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[Access](#)

[Assignment](#)

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[Report](#)



Assignment Report



Contact Report



Supervisor Dashboard



Dashboard

[Main Menu](#)

1

1

From Date

To Date

Team

Dealer

A/C

Remark

Rank 

Preference ☐

☐ By ProjectAssigned Date ▼

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Search

[illegible]

[illegible]

☐ Text Template☐ HTML Template[Main Menu](#)

Template Name

Subject

Content

No	Template Name		
1	Assignment Email Template	<input type="button" value="Edit"/>	<input type="button" value="Del"/>
2	Lead Assignment Email Template	<input type="button" value="Edit"/>	<input type="button" value="Del"/>
3	Follow up Email Template	<input type="button" value="Edit"/>	<input type="button" value="Del"/>


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T10	Name (job title)	Age	Nickname	Employee
T11	Giacomo Guilizzoni	37	Peldi	<input type="radio"/>
TA	Founder & CEO			
	Marco Botton	34		<input checked="" type="checkbox"/>
	Tuttofare			
	Mariah Maclachlan	37	Patata	<input type="checkbox"/>
	Better Half			

Project Info

Project Name

Cut Off Date



Project Objective

☐ Auto Assign

Search

Save

[illegible]

[Main Menu](#)

1

1



Name

NRIC/Passport

Account No

Mobile No

Home Phone No

Geneer

Event

Email

Uplad the leads

Upload

[Main Menu](#)

No	A/C	NRIC Passport	Mobile No	Home No	Gender	Event		
1	L000001	12345	9000 4000	3122 2222	M		Edit	Del

Existing

No	A/C/ Name	NRIC	
1	L000001	Lead A	12345

New

No	A/C/ Name	NRIC	
1	L000001	Lead A	12345

☐ Create Role

Role Name

Role Description

☐ Modify/Delete Role

Role Name

Role Description

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No	Function	Create	Modify	View	Delete
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3	Client Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Assignment Report	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Name

Account No.

NRIC/Passport

Email

Home Contact No

Mobile No

Gender

Remark

Event

Preferred mode of Contact

☐ Followe up



Save

Sync

A bar chart with two groups of bars. The first group has a light gray bar (likes) and a dark gray bar (dislikes). The second group also has a light gray bar (likes) and a dark gray bar (dislikes). The y-axis represents the number of people, with a scale from 0 to 10. The x-axis has two categories, each with a label 'The Matrix'.

Category	Likes (Light Gray)	Dislikes (Dark Gray)
The Matrix	4	5
The Matrix	7	6

[illegible]

Name

Account No.

Phone

Gender

☐ Followe up by



Date



Save

[illegible][illegible]