

## Assigned Clients Records

Main	Menu

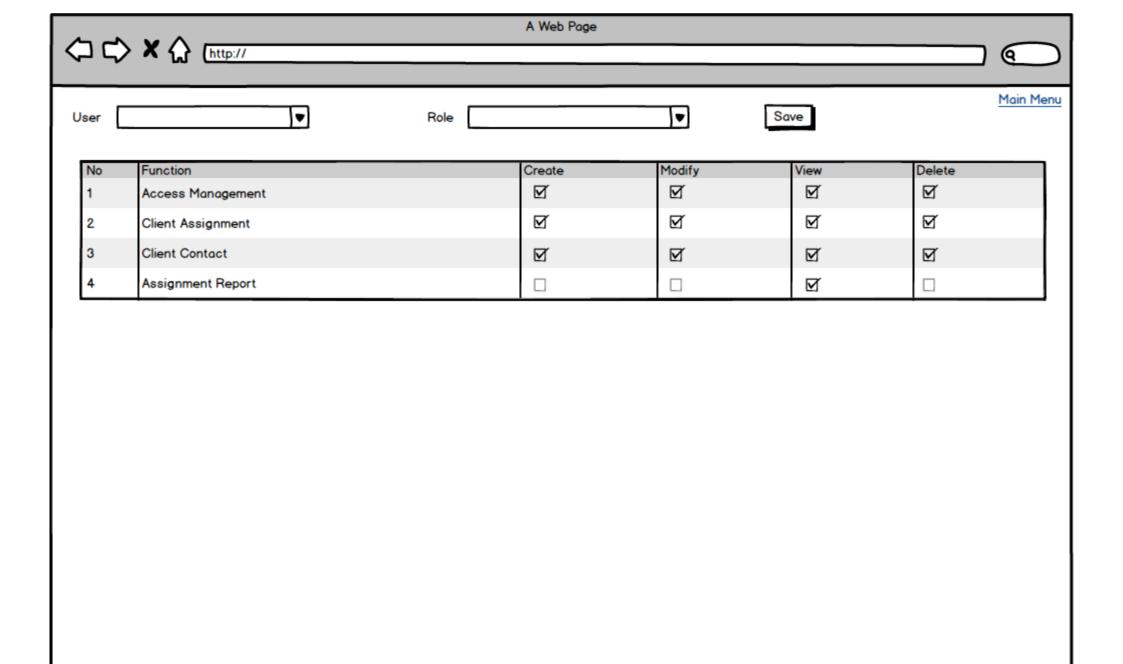
Contact Period	Number of Calls Left	Follow up Date
29/12/2013 - 01/12/2013	<u>5</u>	
	29/12/2013 - 01/12/2013	29/12/2013 - 01/12/2013 5

### Assigned Leads Records

intact Period	Number of Calls Left	Follow up Date
/12/2013 - 05/12/2013	<u>2</u>	

### Commission Earned

Name (job title)	Age≑	Nickname	Employee▼
Giacomo Guilizzoni Founder & CEO	37	Peldi	•
Marco Botton Tuttofare	34		Ø
Mariah Maclachlan Better Half	37	Patata	Θ



_	Assignment Report													
<⊃ (	http://spmphase4/assignmentreport.aspx													
	From Date / / To Date / /									Main Men				
	Dealer Choose Dealer ▼ A/C NRIC													
	OBy Assigned Date  Assigned Date Choose Assigned Date ▼  Choose Project ▼													
								Sec	arch					
No	Dealer	Team	A/C	NRIC	Name	A/C Created Date	Assigned Date	Assigned LTD	Current LTD	Last Call Date	Cut Off Date	MonthDiff	Total Comm	No of Trade

SPM Phase IV  http://spmphase4/ClientAssignment.aspx								
Filter Search Team Popup  Account Service Type Cash Trading CFD Custodian	Account Number 000001	Status Contact Mode						
✓ Cash Management  ☐ Phillip Margin  ☐ Phillip Financial  ✓ Discretionary Account  ☐ Unit Trust Non Wrap	Project Name  Project Objective  Select file to upload  Upload Image	File Name Testing Project Remove Preview						
AccNo Name Stock Mart  000001 Client 100	I A/C Lost	AE Code Core Total Call Last Rank Last Call Dealer Date Last Assign Date Total Call Delete						

SPM Phase IV  (http://SPMPhase4/MainMenu.aspx						
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SPM Phase IV  (http://SPMPhase4/MainMenu.aspx  (example of the content of the con						
http://SPMPhase4/Mai	nMenu.aspx					
	Setup Access	Assignment Contact	Report			
Ad	ccess Management	Role Managemen	t			

SPM Phase IV  \$\times \times \	$\overline{\ }$
(http://SPMPhase4/MainMenu.aspx)	ر
Setup Access Assignment Contact Report	
Dealer Management Lead Management	
Dealer Management Lead Management	
Core Client Management Email Template Management	

SPM Phase IV  (http://SPMPhase4/MainMenu.aspx					
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	Setup Access Assignment	Contact Report			
	Client Assignment	Lead Assignment			

SPM Phase IV  thttp://SPMPhase4/MainMenu.aspx							
http://SPMPhase4/Mo	ainMenu.aspx	_					
	Setup Access	Assignment	Contact	Report			
	Client Contact		Lead Conta	ct			

SPM Phase IV	$\supset$
Setup Access Assignment Contact Report	
Assignment Report Contact Report	
Supervisor Dashboard Dashboard	





You have 2 Clients assigned to call

Main Menu

No.	A/C	Name	Gender	Contact No.	Rank	Trade	Stock Market	Bal	Total Call	Contact	Assign	Cutoff Date	TR/Core	s
1	000001	Client A	М	9000 6000										A
2	000002	Client B	F	2000 4000										
														₹

You have 1 Clients assigned to followup

No.	A/C	Name	Gender	Contact No.	Rank	Trade	Stock Market	Bal	Total Call	Contact	Assign	Cutoff Date	TR/Core	S
1	000001	Client A	М	9000 6000										Î

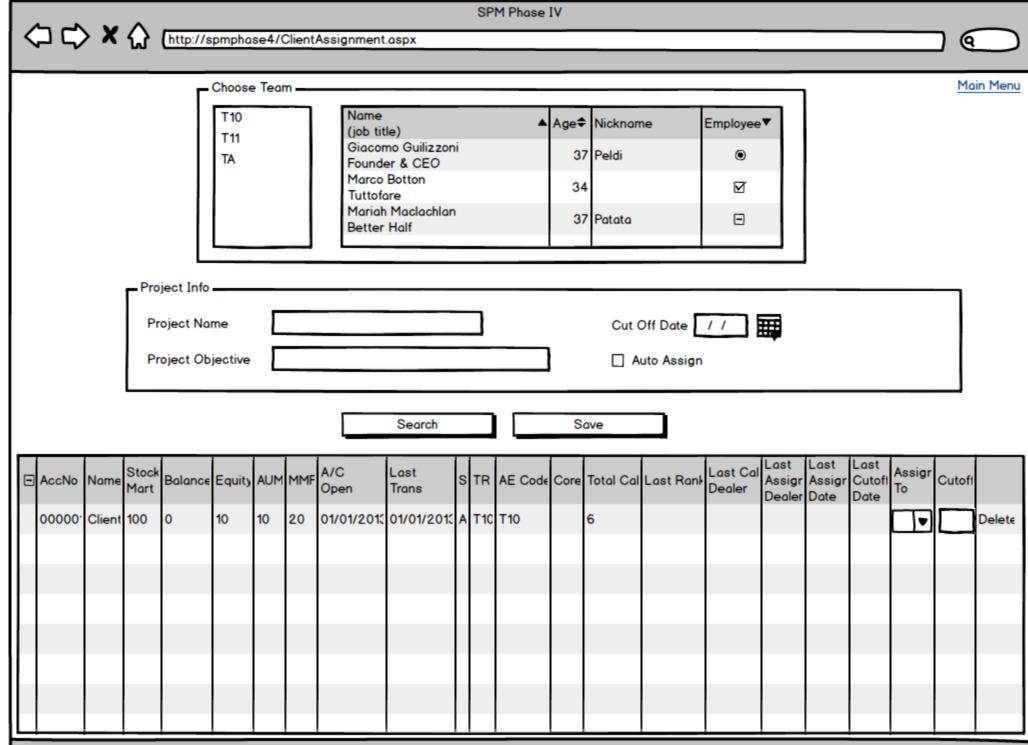
Your call list (The calls that you have been made)

No.	A/C	Name	Gender	Contact No.	Follow up Status	AE	Alt AE		
1	000001	Client A	М	9000 4000				Edit	<u>Delete</u>

_	7 ~	<b>X</b> ♠ http://s	n=nh a a A / a a si	tt	Assignment	Report		
_		nttp://s	pmpnase4/assi	gnmentreport.aspx				
				From Date	/ / To	Date //		<u>Main Menu</u>
Tea	m	•	Dealer	1	A/C	Remark		
			Rank	,	Preference	ce 🔻		
		OBy Assigned	Date			○By Project		
		Assigned Date		•			▼	
					[82.00			
	NI-	A / C	T	Dealer	Searc		Doranda	_
	No 1	A/C 000001	Team T10	Dealer Dealer A	Gender M	Contact 9000 4000	Remark  Called by Dealer A	

				SPM Phase	IV				
$\Diamond$	c> X 🏠 [http:	//spmphase4/c	dealermanage						
									Main Menu
Dealer	Code	Lo	ogin ID	Email			Alternative Dealer Code		
Name		Te	eam Code		User Typ	e			
					Adm	inistrator			
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					○ Use	r			
	Search C	Create							
<u> </u>	Sedicin	reate							
No	Dealer Code	User ID	Name	Email	Team	AE Code	Administrator/ Supervisor/		
	T10 1	ittest	User A	waara@amail.aam	T10	T40 4	User Y	[ E   E	
1	T10_1	ittest	User A	usera@gmail.com	1 10	T10_1	Ť	Edit	Del

44 44	^		SPM Phase IV			
	<b>公</b> (	http://spmphase4/EmailTemplate.aspx				
						 Main Manu
○ Text Temp	late	OHTML Template				Main Menu
Template Name			}			
Subject						
Content				_		
Content						f
						LV.
		Save				
1	No	Template Name				
	1	Assignment Email Template		Edit	Del	
	2	Lead Assignment Email Template		Edit	Del	
	3	Follow up Email Template		Edit	Del	







You have 2 Leads assigned to call

Main Menu

No.	A/C	Name	Gender	Contact No.	Rank	Trade	Stock Market	Bal	Total Call	Contact	Assign	Cutoff Date	TR/Core	S
1	000001	Lead A	М	9000 6000										
2	000002	Lead B	F	2000 4000										
														Ū

You have 1 Lead assigned to followup

No.	A/C	Name	Gender	Contact No.	Rank	Trade	Stock Market	Bal	Total Call	Contact	Assign	Cutoff Date	TR/Core	S
1	000001	Lead A	М	9000 6000										ĺ

Your call list (The calls that you have been made)

No.	A/C	Name	Gender	Contact No.	Follow up Status	AE	Alt AE		
1	000001	Lead A	М	9000 4000				Edit	<u>Delete</u>

	<b>.</b>			A Web Page				
$\Box$		http://SPMPhase4/Le	eadManagement.aspx					
								Main Menu
Name	•			Uplad the le	ads ———			
NRIC	/Passport			Upload				
Accou	unt No			11 1	Upload	ר		1
Mobile	e No							
Home	Phone No							
Gene	er							
Event	t							
Email								
		Save						
l								
No	A/C	NRIC Passport	Mobile No	Home No	Gender	Event		
1	L000001	12345	9000 4000	3122 2222	М		Edit	Del
Ш								
Ш								
_			'					

Existing New

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

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

Keep Existing

Keep New

○ Create Ro	http://spmphase4/rolemanagement.aspx		_		
	ole	○Modif	y/Delete Role		Main M
Role Name		Role Nar	me		•
Role Descrip	ption	Role De	scription		
	Save		U	pdate	Delete
No Fun	nction	Create	Modify	View	Delete
Acc	cess Management	Ø		₽	
2 Clie	ent Assignment	₽	Ø	Ø	☑
3 Clie	ent Contact	₽		Ø	
4 Ass	signment Report			₽	

Name		Event			
Account No.		Preferred mode	of Contact		•
NRIC/Passport		☐ Followe up		/ /	
Email					
Home Contact No					
Mobile No					
Gender					
Remark					
	Save	Sync			





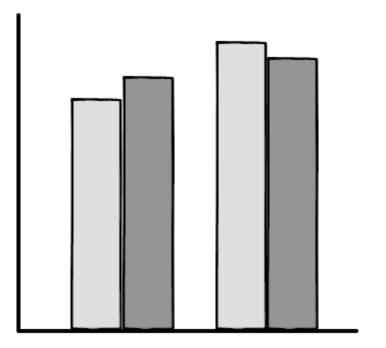
http://SPMPhase4/SupervisorDashboard.aspx



Main Menu

Project Name Autocomplete

Project Name	Assigned Clients	Assigned Leads	Cut Off Date
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Commission earned for this project

Project Name	Assigned Clients	Assigned Leads	Cut Off Date

Name		]
Account No.		]
Phone		]
Gender		]
Followe up by	•	Date / /
1	Save	

# Client Info

No	A/C	Contact Date	CutOffDate
1	000001	27/12/2013	01/01/2014

# Lead Info

No	A/C	Contact Date	CutOffDate
1	L00001	27/12/2013	01/01/2014