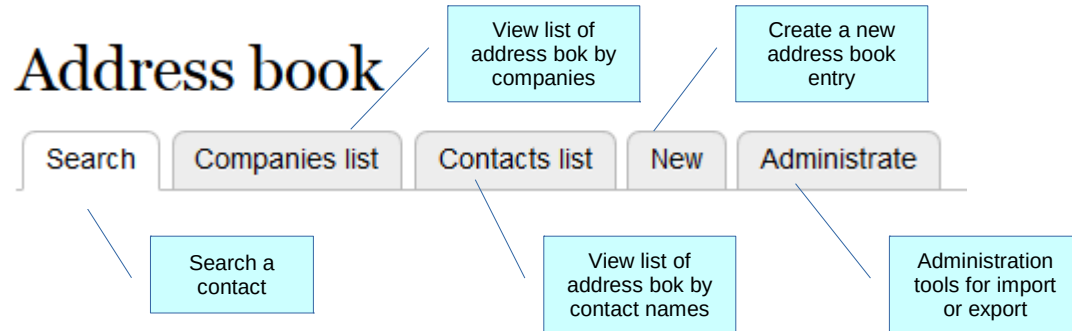


Overview of address book module

This module keep records of contacts, clients suppliers.
Contacts from address book are used in other modules like sales or logistics

Main address book page (/address_book) is made of few tabs



Address book

Search Companies list Contacts list New Administrate

best

-  Best Outlet Distribution Ltd (supplier)
-  Best Outlet Distribution Ltd (client)
-  Best Outlet store (client)

To search existing entries, simply type the key word, name and select corresponding name in the list

List display based on keyword



Address book view

View Edit Delete Sales

Access to sales date if module is available

Click for new search

Edit data tab

Deletedata tab

New search

(last edit 2017-11-30)

Best Outlet Distribution Ltd LOGO
BOD

Address

7 Jalan Cash 54600
Goldarea Malaysia
33658 Kuala Lumpur

Status:

active

Tag:

Retail

Type:

client <->

Click to switch to "supplier" type

Contact

Tel 604646466 Fax 3745696332
www.yahoo.com

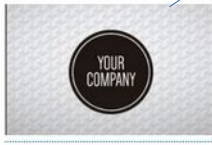
Click add new contact

+ Add contact

Name cards

Mr. Goh

- Goh
- Manager
- 604646466
- 015549436
- ib@google.com



name card image

PDF

Export details in Pdf format

Mr. K John

- K John
- Engineer
- 6046455466
- 015679436

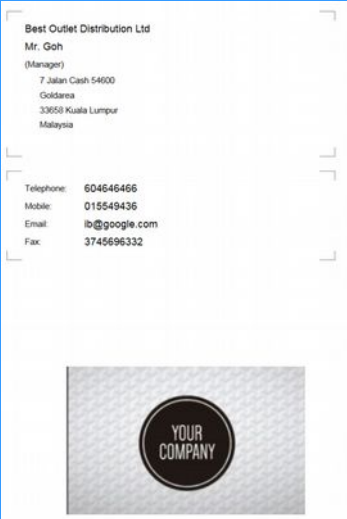


Search results

Main company contact and info

List of contacts details

Ex. of pdf export



Edit address book

New entry
Url: /new_contact

View Edit Sales

Best Outlet Distribution Ltd
Organization name

80D
Short name

active
Status

7 street Cash
Address line 1

New York
City

12345
Postcode

Goldarea
Address line 2

American Samoa
Country

1111-11-01
Telephone

222-33-33
Fax No.

www.yahoo.com
Web site

client
Organization type

Head office
Organization category

retail x store x
Tags

Activity tags

Upload logo
Browse... No file selected.

delete logo:

Section for main contact of the new company

Short name is auto generated but can be changed manually

Address line 1 & 2

City

Country

Tel, Fax and web

Type, client, supplier or other

Logo

You must have 1 primary contact

By default you can add 1 contact card. You can add more later when editing

You can upload scanned image of namecard

You can input free text as comment

Record

Address book view

[View](#) [Edit](#) New entry has been recorded

[Sales data](#) [New search](#)

[\(last edit 2016-08-13\)](#)

International NewCo

INco

Address

World Street
#21-01 High Tower
12345

United States
New Work City

States: active
Activity: TRAVEL-LEISURE
Type: client [Clone](#)

Contact

Tel 111-11-11 Fax 222-33-33
www.newco.co

Name cards

Add contact

You can now add new contacts if necessary

Mrs. Johanne Lee

- Manager
-
-
-
- jl@newco.co
-
-

International NewCo

Johanne Lee
Manager

[Pdf](#)

Clone example

When cloning an entry it replicates all data of original entry under different type. You can then edit information of the cloned entry.

Edit cloned address book

<input type="text" value="International NewCo"/> Organization name	<input type="text" value="INco"/> Short name	<input type="text" value="active"/> active
<input type="text" value="World street"/> Address line 1	<input type="text" value="New Work city"/> City	<input type="text" value="12345"/> Postcode
<input type="text" value="#21-01 High tower"/> Address line 2	<input type="text" value="United States"/> Country	
<input type="text" value="111-11-11"/> Telephone	<input type="text" value="222-33-33"/> Fax No.	<input type="text" value="www.newco.co"/> Web site
<input type="text" value="supplier"/> Organization type	<input type="text" value="Head office"/> Organization category	<input type="text" value="travel-leisure x"/> Tags

New contact card No. 1

Record

View demo



Delete address book

[View](#) [Edit](#) [Delete](#) [Sales](#)

This address book cannot be deleted. It is used in following module(s): logistics, sales, projects

Address book entry cannot be deleted if used in other modules

Delete address book

[View](#) [Edit](#) [Delete](#) [Sales](#)

ADTe Services (supplier)

Confirm delete (including attached namecards)

Confirm deletion including name card attached to this entry

Company list view

Search Companies list Contacts list New Administrative

List of companies in address book

Type first letters to filter by name

Ex. 'a' or 'go'

You can filter the list by keyword

Apply

name ▲	type
International NewCo	Client
International NewCo	Supplier
IP ServerOne Solutions Sdn Bhd	Supplier

Filtered result.
Click to view address
book data

Type of entry

Contacts list view

List of contacts in address book

Search Companies list **Contacts list** New Administrate

contact name ▲	salutation	title	company name
Goh	Ms	Manager	Best Outlet Distribution Ltd
Johanne Lee	Mrs.	Manager	International NewCo
Johanne Lee	Mrs.	Manager	International NewCo
John		Manager	
John			
John Doe	Mr.	Purchase director	Alpha et Omega
Karl		Sales	
Lee	Mr	Manager	Booknote editions Ltd
Marie		Producter	
Mr B	Mr.		CARREFIVE
Mr Fuir			Hurban Merlin
Mr John	Mr.	Engineer	Best Outlet Distribution Ltd

« first < previous 1 2 3 next > last »

Browse list pages

Sales statistics

Statistics can be viewed from address book entry


Address book view

View

Edit

Sales

Access sales and other business data from sales, projects or report modules for this client or supplier

 (last edit 2015-07-10)

Alpha Et Omega

Sales data

View Edit Sales

Alpha et Omega

Comments

[\[edit \]](#)

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. [admin] - 2017-11-10

Documents attached

[toggle deleted files](#)

plan.xlsx

project



Select file:

Browse...

No file selected.

comment

Upload

Projects

If project module is available

A-CA-6_09-BP-313	SINGAPORE	2009-06-01	Deco and supply	completed
A-CA-6_09-BP-311	SINGAPORE	2014-01-16	Project design and supply	open
MVL-Aa-SG-2014_11-AO-15_sub2	CAMBODIA	2014-12-23	Consulting service	open
MVL-Aa-MY-2014_12-AO-18	MALAYSIA	2014-12-23	Repair and maintenance 2	awarded
MVL-D-SG-2016_01-AO-120	SINGAPORE	2016-01-04	New house	awarded
A-MVL-MY-2016_08-AO-125	MALAYSIA	2016-08-18	Yuti	open
A-MVL-SG-2016_10-AO-126	SINGAPORE	2016-10-11	New notif 2	open

Reports

If report module is available

RP-2-01_16-8	2016-01-06
RP-2-01_16-9	2016-01-06

Sales or purchases data

Projects by status

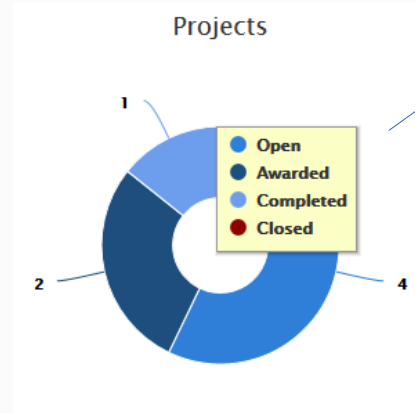
Open	Awarded	Completed	Closed
4	2	1	
7			

Projects by year

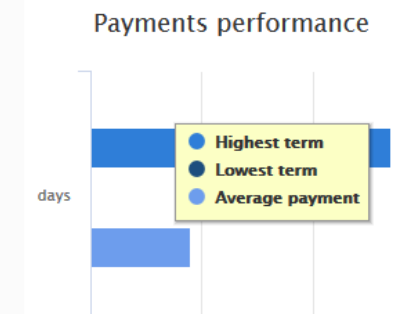
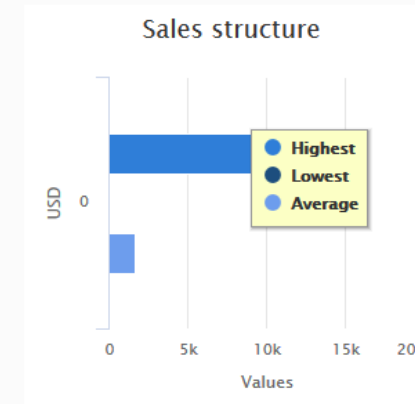
2011
 2012
 2013
 2014 | General trade : 1 | Item production : 1 | Design : 1
 2015
 2016 | General trade : 1 | Consulting : 1 | Design : 1
 2017

Sales

Total transactions : 19,751 USD



Requires "charts" module



Warning: import and export process may be critical. Make sur you have a backup before proceeding

Address book administration

Search Companies list Contacts list New Administrate

Import | Export

There are 2 administration tasks:
import and export

The screenshot shows a web interface for address book administration. At the top, there is a horizontal row of five buttons: 'Search', 'Companies list', 'Contacts list', 'New', and 'Administrate'. Below this row, there are two links: 'Import' and 'Export', both underlined. A light blue callout box with a thin border points to the 'Export' link. The callout box contains the text: 'There are 2 administration tasks: import and export'.

The export format is in excel.
The table extracted can be **re-used as format template** for importing of data

Address export

Search Companies list Contacts list New Administrate

Import | Export

All types ▼

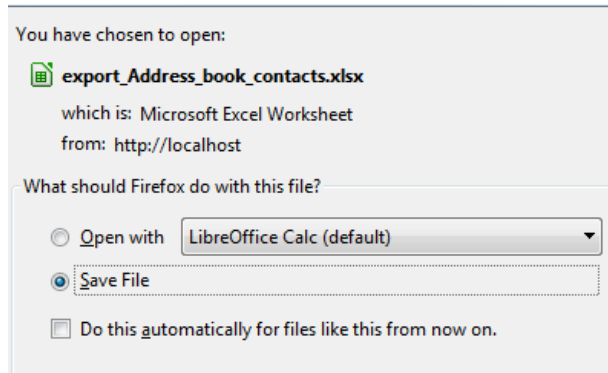
You can choose the type to export:
all, clients, suppliers, others

Contacts ▼

You can choose data to export:
companies or name cards contacts

The export format is in excel. You can re-use the export file structure to import new data in csv format.

Export



The import format is in csv file.
 The excel table from export can be **re-used as format template** and saved as csv format for import

Address import

Search Companies list Contacts list New Administrate

Import | Export

Contacts

You can choose data to import companies or name cards contacts

Insert (add to existing)

You can choose the import mode: add or replace

, : comma

delimiter character

Select delimiter and enclosure characters based on you csv format

" : double quote

enclose character

Upload data file

Browse... imopr Address_book_contacts.csv

CSV format file to import

The import format should be a text csv file. You can re-use the export file structure to import new data.

Import

Example of CSV file structure created with excel table with 1 row entry

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	
1	id	name	shortname	address	address2	postcode	city	country	telephone	fax	website	type	category	status	stamp	activity	
2	1	Jolly test	JOT	address 1	address 2	J778	Juiguo7	Loopy	132	465	"		3	store	1	1970-01-01	test
3																	



id,name,shortname,address,address2,postcode,city,country,telephone,fax,website,type,category,status,stamp,activity
 1,Jolly test,JOT,address 1,address 2,J778,Juiguo7,Loopy,132,465,',',3,store,1,1970-01-01,test

Text file separated by commas

✓ Inserted 1 row(s)



AREA
Systems

AK