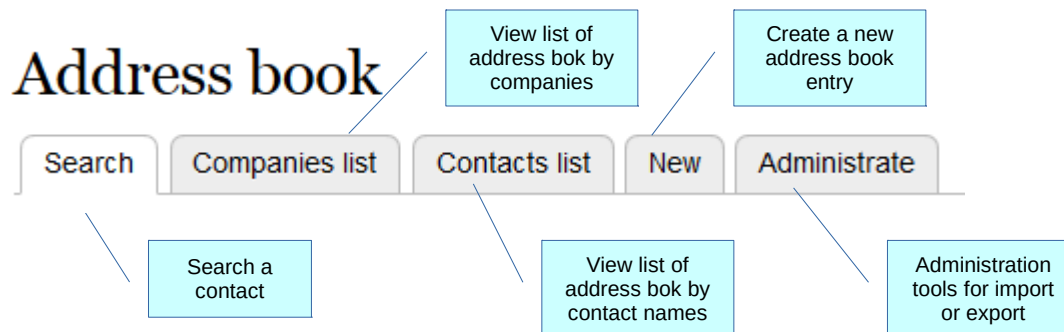


Overview of address book module

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

Adminis

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

best



Best Outlet Distribution Ltd (supplier)



Best Outlet Distribution Ltd (client)



Best Outlet store (client)

List display based on keyword

View demo



Address book view

View Edit Delete Sales

Access to sales date if module is available

Click for new search

Edit data tab

Delete data tab

New search

(last edit 2017-11-30)

Best Outlet Distribution Ltd

LOGO

BOD

Address

Click to copy address to clipboard

Main company contact and info

7 Jalan Cash 54600
Goldarea
33658

Malaysia
Kuala Lumpur

Status:

active

Tags:

Retail

Type:

client <->

Click to switch to "supplier" type

Contact

Tel 604646466
www.yahoo.com

Fax 3745696332

Click add new contact

+ Add contact

List of contacts details

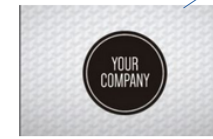
Name cards

Mr. Goh

Click to copy contact to clipboard

name card image

Goh
Manager
604646466
015549436
ib@google.com



PDF

Export details in Pdf format

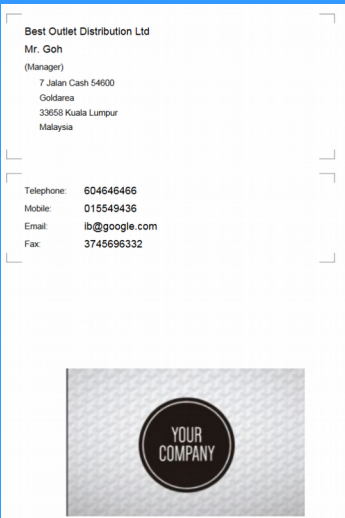
Mr. K John

K John
Engineer
6046455466
015679436



Search results

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:

New contact card No. 1

Johanne Lee

Set as primary

Mrs.
Title or function

Telephone

Mobile phone

Email address

Upload a name card image

Browse... No file selected.

Department or office

Social network

You can input free text as comment

Record

Section for main contact of the new company

Short name is auto generated but can be changed manually

Address line 1 & 2

Tel, Fax and web

Type, client, supplier or other

Logo

You must have 1 primary contact

You can add more salutation with taxonomy

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

Address book view

View Edit

New entry has been recorded

New search

📅 (last edit 2016-08-13)

📊 Sales data

International NewCo

INco

📍 Address

World Street

#21-01 High Tower

12345

United States

New Work City

Status:

active

Activity:

TRAVEL-LEISURE

Type:

client [Clone](#)

If you have created the entry under client type, you can clone it under supplier

📞 Contact

Tel 111-11-11

Fax 222-33-33

www.newco.co

👤 Name cards

You can now add new contacts if necessary

Add contact

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

Organization name

Short name

Address line 1

City

Postcode

Address line 2

Telephone

Fax No.

Web site

Organization type

Organization category

Tags

New contact card No. 1

Record

View demo



Add new name

There are 2 options to add names to existing address book entry:

1) copy existing from another entry;

2) record a new name card

[Back to address book](#)

The screenshot displays two main sections of the software interface:

- Copy existing card:** This section has a header "Copy existing card" and a sub-header "Enter names to copy". A search input field contains the text "jo". A dropdown menu is open, listing several names with their roles: "Khol John [Best Outlet Distribution Ltd | client]", "Brown Jo [Bright Garment Pte ltd | supplier]", "John Deux [Alpha et Omega | client]", "John Garry [Best Outlet Distribution Ltd | supplier]", "John German [J English | client]", "Johanne Lee [ADTe Services | client]", "John Deux [Alpha et Omega | supplier]", and "Johanne Lee [Alpha et Omega | supplier]". A callout box with a cyan background and black text says "Attach existing name card to address book entry", with a line pointing to the dropdown menu.
- New contact card:** This section has a header "New contact card". It contains several input fields: "John Deux" (pre-filled), "Mr." (dropdown), "Title or function", "Telephone", "Mobile phone", and "Email address". Below these is a section "Upload a name card image" with a "Browse..." button and the text "No file selected.". At the bottom is a "Department or office" field. A callout box with a cyan background and black text says "Enter new data", with a line pointing to the "John Deux" input field.

Add vocabulary ☆

[Home](#) » [Administration](#) » [Structure](#) » [Taxonomy](#)

Name *

Add vocabulary with name
"salutation"

Machine name: salutation [Edit]

Description

Save

salutation ☆

List

Edit

Manage fields

Manage form display

Manage display

[Home](#) » [Administration](#) » [Structure](#) » [Taxonomy](#) » [Edit salutation](#)

✓ Created new vocabulary *salutation*.

You can reorganize the terms, add new terms, delete terms, edit term handles, and group terms into vocabularies.

In "salutation", add items

+ Add term

Add term ☆

[Home](#) » [Administration](#) » [Structure](#) » [Taxonomy](#) » [Edit salutation](#)

Name *

Add salutation title and "save"

Description

B *I* | | | **E** | Normal | Source

Save

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

List of companies in address book

Search

Companies list

Contacts list

New

Administrate

Type first letters to filter by name

b

You can filter the list by keyword

Ex. 'a' or 'go'

Apply

name ▲	type
Bekalan PIT Sdn Bhd	Supplier
Best Outlet Distribution Ltd	Client
Best Outlet Distribution Ltd	Supplier
Best Outlet store	Client
Blue globe	Client
Booknote editions Ltd	Supplier
Bright Garment Pte ltd	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: No file selected.

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

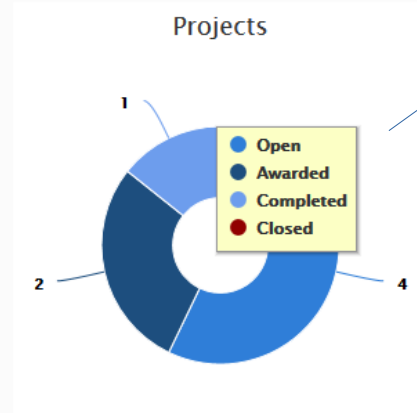
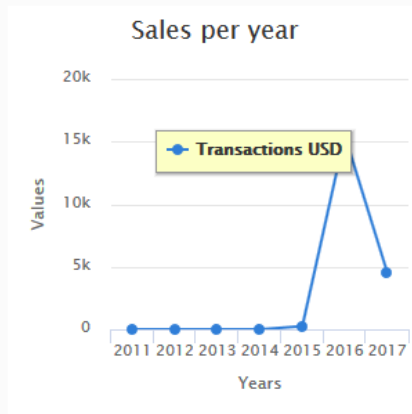
Open	Awarded	Completed	Closed
4	2	1	
7			

Projects by year

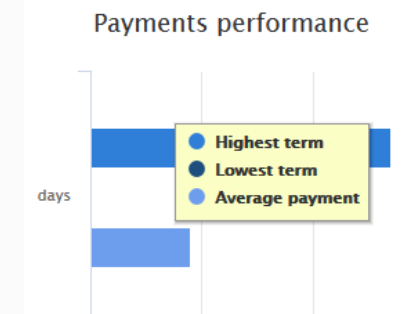
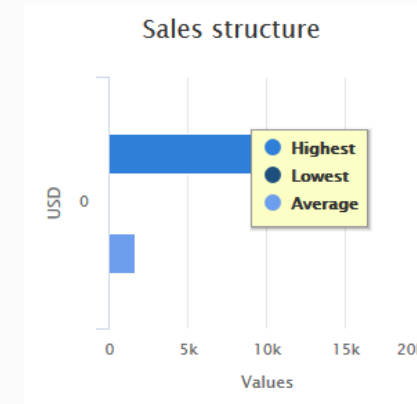
2011
 2012
 2013
 2014 | General trade : 1 | Item production : 1 | Design : 1
 2015
 2016 | General trade : 1 | Consulting : 1 | Design : 1
 2017

Sales

Total transactions : 19,751 USD



Requires "charts" module



Warning: import and export process may be critical. Make sure 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', each underlined. A light blue callout box with a thin border points to these two links, containing 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 ▼

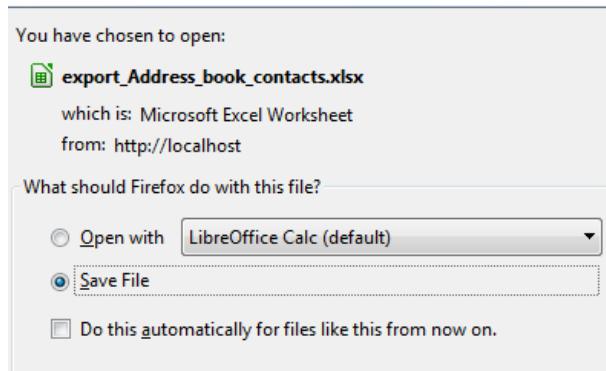
You can choose the type to export:
all, clients, suppliers, others

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

Insert (add to existing)

, : comma
 delimiter character

" : double quote
 enclose character

You can choose data to import companies or name cards contacts

You can choose the import mode: add or replace

Select delimiter and enclosure characters based on you csv format

Upload data file

imopr Address_book_contacts.csv

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

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