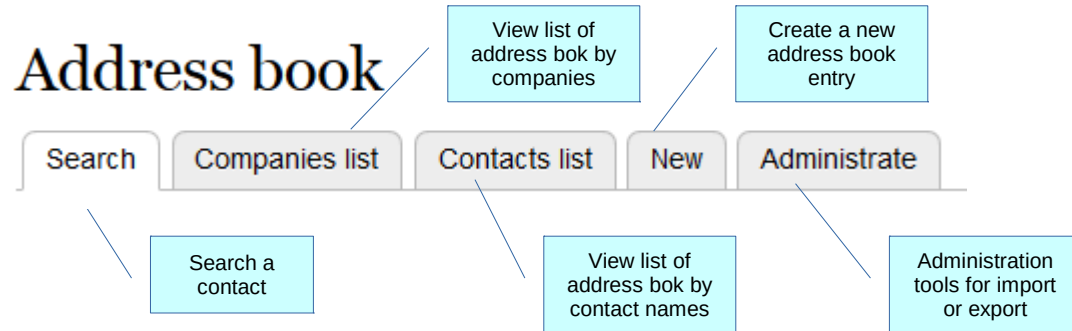


Overview of address book module

This module keep records of contacts.
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

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

Search Companies list Contacts list New Administrate

bes

- Best Outlet Distribution Ltd
- Best Outlet store

Search

Click search to view the address book data

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

If entry as different types, you can select the one you want to view

Search results

Ex. of pdf export

Address book view

View

Edit

Edit data tab

Click for new search

New search

📅 (last edit 1970-01-01)

📊 Sales data

Access to sales date if module is available

Best Outlet Distribution Ltd

BOD

📍 Address

7 Jalan Cash 54600
Goldarea
33658

Malaysia
Kuala Lumpur

Status:

active

Activity:

RETAIL

Type:

client

Main company contact and info

📞 Contact

Tel 604646466
www.yahoo.com

Fax 3745696332

Click add new contact

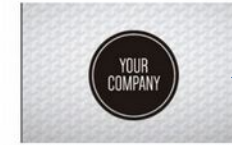
Add contact

List of contacts details

👤 Name cards

Mr. Goh

👤 | Manager
📞 | 604646466
☎ | 015549436
✉ | ib@google.com



Scanned name card

📄 Pdf

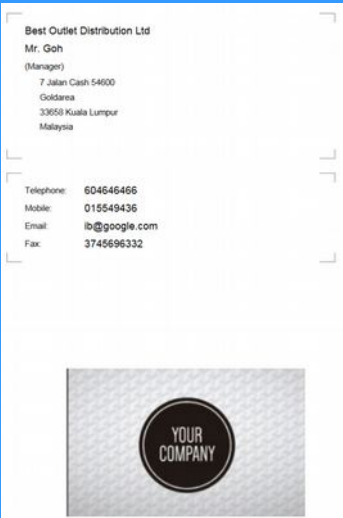
Export details in Pdf format

Mr. Mr John

👤 | Engineer
📞 | 6046455466
☎ | 015679436
✉ | ib@google.com



📄 Pdf



Edit address book

New entry
Url: /new_contact

Search Companies list Contacts list New Administrate

Section for main contact of the new company

International NewCo INco active Status

World street City New Work city Postcode 12345

#21-01 High tower United States Country

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

client Organization type Head office Organization category TRAVEL-LEISURE Activity tag

Address line 1 & 2

Tel, Fax and web

Type, client, supplier or other

Short name is auto generated but can changed manually

City

Postcode

Country

Activity tag

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

▼ 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

Record

Address book view

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

[Sales data](#)

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

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](#)

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

You can now add new contacts if necessary

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"/>
<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"/>	
<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"/>	<input type="text" value="Head office"/>	<input type="text" value="TRAVEL-LEISURE"/>
Organization type	Organization category	Activity or segment tag

▸ Contact card No. 1

▾ New contact card No. 2

<input type="text" value="Contact name"/>

Record

Company list view

Search Companies list Contacts list New Administrate

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

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 menu with five buttons: 'Search', 'Companies list', 'Contacts list', 'New', and 'Administrate'. Below this menu, there are two links: 'Import' and 'Export', both 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 ▼

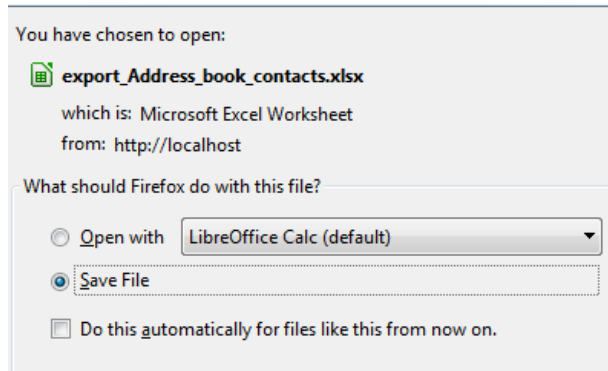
You can choose the type to export:
all, clients, suppliers, others

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 ▼

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
id	abid	contact_name	salutation	title	telephone	mobilephone	email	card	department	link	comment	main	stamp	name
125	125	Marcus Bolt	Mr.	Sales Manager	111-11-11		mb@newco.co					1		International NewCo(id: 125)

✓ Inserted 1 row(s)



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Systems

AK