TVCS System Version 2014 Manual (Design for usage of specific industry)

System Introduction - Main Description:
- A tailor-made Content Management System produced by PHP and MySQL operated preferably under Window Server OS which can be accessed by various roles of staffs of company department under Intranet network environment to facilitate company operation.
- A system for searching customer, data of company files. Each file has a customer prefix contract reference number such as ABC0000001 and so on.
- An established system for clients that is suitable to operate in different types of industry. Different department and grade of company users such as Sales executive can contact target customers to introduce company products or follow up company projects.
- CMS can allow different purview level of users to record customer inquiries and project progress. Client audit account login function is available for review purposes, and make sure that clients can review project information, sales items as well as payment record.
- CMS Software allows administrator to backup and restore data quickly and efficiently.
- Various kinds of tailor-made function of reports can be generated and produced for clients. Further system optimization can be achieved with effective database column and structure design.

System Introduction - Main Features:
- Columns of all major layout task lists can be sorted by ascending or descending order, with custom columns search function by single / multiple items under specific criteria and status, support huge database manipulation, data is stored by UTF-8 encoding.
- Information of project items are well-defined and categorized, such as case reference number, project status, assign date, next follow up date, close date, follow up staff number, project charge, handling charge, sales commission rate etc.
- User-friendly UI is designed to simplify procedure when searching items.Various kinds of interface can also let user search the required information by input criteria and user purview level.
- Past project action record function is categorized for easier viewing and searching.
- Flexible project payment by instalment input mode that allow user to accurately keep track of promised payment, unconfirmed payment and confirmed payment. There is also payment id linkage mechanism.
- Sales Executive project visit record and address approval function.
- Input mode (bulk import / single input) tremendously facilitate the routine operation of administrative staffs.
- Major system management categories include:
i) System Management
ii) User Management
iii) Client and Payment Management
iv) People Management
v) Project Management
vi) Internet Search Function
vii) Reports and Statistics
viii) User Mailbox Function
ix) Fingerprint Device Connection Attendance Function

I) System Management:

System log - Record user action log in system: includes add, search, edit, delete and import information record of all staffs, the database capacity can record more than million rows of record.

Basic system settings:

Company list - The system can be simultaneously used by multiple companies or company branches. Project data can be categorized by purview accordingly.

Department list - According to the assigned user purview, different department users have different rights in the system. Manager or specific user can add, search, edit and delete department data by checking purview check box depends on user operation requirement. Department and position default check box setting functions are available for the convenient of adding user.

Team list - According to the assigned user purview, different team users have different rights in the system. Manager or specific user can add / search / edit / delete team data, staffs can be grouped into different teams to follow up projects of the company and team forecast analysis report will be generated in system report section.

Country, city, district and region code list are used to categorize people's address, the purpose of identification for the convenience of printing sales executive visit record.

Staff position history record list - Can record staff positions and team history information.

II) User Management:

User list - According to the assigned user purview, different users have different rights in the system. Manager or specific user can add / search / edit staff status and information, tick checkbox to setup user purview. Client audit account login function is available for review purposes, and make sure that clients can login and review own project information, such as project progress and payment information. User can setup the display column option in the main user list.

Password editing - User password is stored by md5 encryption in database for security reason, users can be endowed the edit password function. Administrator can edit password of different users and users can also edit password on their own.

Sales executive and team head commission list - According to the assigned user purview, different users have different commission rate in the system. Manager or specific user can add / search / edit / delete user commission rate which calculates by turnover amount, user can setup different commission rate according to turnover amount. User can setup general commission rate or certain valid period of commission rate.

Company event record - User can issue different kinds of event article and setup event classification, e.g. announcement, news notification. The system can record reading event status of individual user and user can upload attachment for each event.

Batch email function - User can group client email contact list and save as csv file. User can send batch email to clients and attach picture files.

Purview list - The list can show user purview of all task list, or display staff list of a certain specific purview.

III) Client and Payment Management:

Client type list - User can add, edit, search or delete customer category.

Client list - User can view existing customers list by company categorization, information includes client sequence, client ID, client type, client name, salesperson's commission rate, company default commission rate, number of assigned case, number of handling case and more other detailed columns (such as bank account, company address, region, country, last update time and remark). User can setup the display column option in the main client list.

Client case information - Record information of assigned case number, unassigned case number, handling case number, returned case number, close case number and total number of cases.

Client contact person information - Record client individual contact person's detailed information, include contact person ID, title, name, position, mobile, telephone, fax, email, last update time.

Company salesperson commission - Record individual customer and relative company salesperson's commission rate during different period.

Quotation / Invoice attachment - Record individual customer and relative company documents, the record list stores input staff number and user can upload client quotation / invoice.

Payment list -> promised payment list - according to the system user permissions, the list will display promised payment files, user can search and filter broken promise or promise to pay information by year, month, day and specific columns criteria. Promised payment list supports multiple columns filter search, sorting, separate pages display function and another project summary table which includes client information, number of cases, number of broken promise cases and total promised amount etc. User can gain access to the work layout which sorted by the filter criteria to facilitate project file processing.

Payment list -> to be confirmed payment list - according to the system user permissions, the list will display unconfirmed payment files, user can search and filter unconfirmed payment information by year, month, day and specific columns criteria. To be confirmed payment list supports multiple columns filter search, sorting, separate pages display function and another project summary table which includes client information, number of cases, number of unconfirmed payment cases and total unconfirmed amount etc. User can gain access to the work layout which sorted by the filter criteria to facilitate project file processing.

Payment list -> confirmed payment list- according to the system user permissions, the list will display confirmed payment files, user can search and filter confirmed payment information by year, month, day and specific columns criteria. Confirmed payment list supports multiple columns filter search, sorting, separate pages display function and another project summary table which includes client information, number of cases, total confirmed payment amount and total commission etc. User can gain access to the work layout which sorted by the filter criteria to facilitate project file processing.

Add receipt - According to the assigned user purview, the system enables user to add receipt which includes information of client number, receiving month, contact person, receipt number, receipt letter, receipt type, remark and generate related period's project files to issue receipt.

Receipt list - According to the assigned user purview, the system will display receipt list which can select by send / cancel / payment date, letter type, client code, receipt type, current status criteria drop down box. User can input keyword to search receipt as well.

IV) People Management:
People is firstly categorized by multiple and selective variable types by paperwork type, relation, telephone nature, address nature, telephone status, address status, company status and occupation status. The system function can be used to observe and predict certain types of customer and case distribution and operation phenomenon.
Phone list - Each phone have a phone ID, the capacity of system can store hundred thousands of phone data including information of telephone country code, area code, phone number, contact status, phone-related cases, phone-related people, number of times of calling and last update time. User can search keyword of phone number and the match string will show in bold font.
Address list - Each address have an address ID, the capacity of system can store hundred thousands of address data including information of address country, address region, address district, area code, contact status, address-related cases, address-related people, number of times of visit and last update time. User can search keyword of address and the match string will show in bold font.
Company list - Each company have a company ID, the capacity of system can store hundred thousands of company data including information of company name, paperwork, operation status, field of industry, remark, company-related cases, company-related people, last update time. User can search keyword of company and the match string will show in bold font.
Company position list - Each position have a position ID, the capacity of system can store hundred thousands of position data including information of position name, position-related cases, position-related people, last update time. User can search keyword of position and the match string will show in bold font. Auto suggest function is available in position input mode.
Company department list - Each department have a department ID, the capacity of system can store hundred thousands of department data including information of department name, department-related cases, department-related people, last update time. User can search keyword of department and the match string will show in bold font. Auto suggest function is available in department input mode.
People list - Each person have a person ID, the capacity of system can store hundred thousands of people data including paperwork, name, people-related cases, gender, birth date, age, age range, last update time and remark. Past personal information will also be stored when personal information is updated. User can search keyword of people and the match string will show in bold font. User can setup the display column option in the main people list.
Add person - Support single-mode input and multiple people data import interface: User can simultaneously input multiple people personal information, people relations and contact information.
Add contact - Address approval list - Address approval is needed when specific position staff add address contact information of people
Add project relationship - User can input project case number, people ID, phone ID,

contact nature, address ID, company ID, position ID, department ID, occupation status, role and relationship. Auto suggest function is available in client code input mode.
People and project relationship: according to the system user permissions to add, search, edit, delete the associated relationship with project, the database can handle more than one million of project associated relationship, update mode is imported by spreadsheet format of new project archives.

V) Project Management:
Constant management -> file type setting: according to the system user permissions to add, search, edit, delete file types, such as personal project, commercial project.
Constant management -> current situation setting: according to the system user permissions to add, search, edit, delete the file current situation, such as new assigned, promised payment, installment payment status.
Constant management -> request return setting: according to the system user permissions to add, search, edit, delete the reason of return case.
Constants management -> action code list: according to the system user permissions to add, search, edit, delete the case action code.
Constant management -> general list: according to the system user permissions to add, search, edit, delete the case general record option which can be selected from the list when dealing with project files.
Constant management -> payment method list: according to the system user permissions to add, search, edit, delete the case payment method option which can be selected from the list when dealing with project files.
Constant management -> close status list: according to the system user permissions to add, search, edit, delete the case close status option which can be selected from the list when dealing with project files.
Constant management -> record action list: according to the system user permissions to add, search, edit, delete file action recording options, including general record, commitment to payment, payment, review inspections, visit, messages, letters options.
Constant management -> letter type list: according to the system user permissions to add, search, edit, delete letter types which categorize by client code, client type, selective department. User can set the default letter template format.
New project - user can add new project by client ID, record client reference number, assign date, payment amount, handling fees, overdue fees, adjustment fee, file type, currency, due date, commission calculation, payment status etc, the adding new project interface can simultaneously enter the ID to extract related role of people's information and assoicate relevant information with project file.
Distribution of cases - according to the system user permissions, the list will show clients newly assigned project files, specific user can decide to assign cases to suitable staffs to follow up cases according to phenomenon of project amount, commission and client project number. Project list supports multiple columns filter search, sorting, separate pages display function. Number of project cases display per page can be set, user can gain access to the work layout which sorted by the filter criteria to facilitate user to follow up projects. The system will prompt alert of people and the past payment situation of follow up staffs when assign cases, user can select randomized assignment, tick specific number of staff to follow up cases.

Transfer of cases - according to the system user permissions, the list will show client project's transfer staff record, record transfer sequence ID, transfer execution information, project case number, transfer time, transfer phenomenon, assigned staff and reading status of transfer situation.
Management of project (handling project) - according to the system user rights to show the project list, user can enter more than one people or people related information to search processing and non-processing project list. Project list supports multiple columns filter search, sorting, separate pages display function. Number of project cases display per page can be set, user can also search amount which remaining amount is more or less than the number of input amount, user can gain access to the work layout which sorted by the filter criteria to facilitate project file processing. There is also top left search engine to search the project file code, hidden search interfaces can be opened to facilitate searching information. According to the system user permissions, the list will display search results of project, project table information and another project summary table which includes client information, number of cases, payment amount, balance and subtotal amount etc. User who endowed purview can tick cases for status management: management of completed, returned cases or transferred cases to other staff to follow up the project file, the system will record the relevant files update status and information.
Visit record - according to the system user permissions, the list will show details of visit of sales executive when following up project files: detailed records of the project client name, information related to project file, area code, detailed address, request visit date, visit date, precautions, priority situation, day visit / night visit, printing visit paper. Visit list supports multiple columns filter search, sorting, separate pages display function. Number of project cases display per page can be set. The interface enables user to input information feed back to record the status of meeting with clients, user can gain access to the work layout which sorted by the filter criteria to facilitate project file processing.
File management -> handle requested return - according to the system user permissions, the list will display requested return project files, user can search and filter requested return project files by year, month, day and specific columns criteria. Requested return list displays summary of payment amount and supports case status update, case transfer, sorting, separate pages display functions. Number of project cases display per page can be set. User can gain access to the work layout which sorted by the filter criteria to facilitate project file processing.
File management -> returned case list - according to the system user permissions, the list will display returned project files, user can search and filter returned project files by year, month, day and specific columns criteria. Returned list displays summary of payment amount and supports case status update, restore, sorting, separate pages display functions. Number of project cases display per page can be set. User can gain access to the work layout which sorted by the filter criteria to facilitate project file processing.
File management -> Closed case list - when project payment is settled, the closed project files will display in this list, user can search and filter closed project files by year, month, day and specific columns criteria. Closed list displays summary of payment amount and supports case status update, restore, sorting, separate pages display functions. Number of project cases display per page can be set. User can gain access to the work layout which sorted by the filter criteria to facilitate project file processing.
File management -> deleted case list - the list will display cancel or wrongly input project

files, according to the system user permissions, user can search and filter deleted project files by year, month, day and specific columns criteria. Deleted list displays summary of payment amount and supports case status update, restore, sorting, separate pages display functions. Number of project cases display per page can be set. User can gain access to the work layout which sorted by the filter criteria to facilitate project file processing.
Waiting approval letter list - Approval is needed when staffs make a request of sending letter. Waiting approval letter list record letter code, project case number, client code, client reference number, project balance, receiver name, address, staff code, print status, request time, remark and feedback.
Print letters - Letter list is divided into: not yet print and printed letter list, user can tick check box to print default letter template of different types of project files and update the file print status. Letter list record letter sequence ID, letter code, project case number, client code, client reference number, project balance, receiver name, address, staff code, print status, request time, remark and feedback.
Bulk import general project information (Excel csv) - According to the assigned user purview, the system can display tabular spreadsheet record of project archives, including the files of project contact person and project data information. Each time user can import from several rows to several hundred rows of project files by standardized format file that avoid error through manual input. Preview function prompts and displays the correct format required to import a spreadsheet which avoid incorrect information. Import result log list displays the import result and shows whether project contact person's ID already exists in the database, includes paperwork number and name of project contact person checking alert. Project files with multiple contact person can also be processed, the variety of status of import project files can automatically be distinguished.
Batch project edit and delete - According to the assigned user purview, the system enables user to edit or cancel batch imported files by selection checkbox, search log function is also available.

VI) Internet Search:
Content grep search and information restore - the system support I.E., Firefox, Chrome Browser history URL import function. User can make analysis of web site through web browser history text search. Generally speaking, it can be used in procurement or research environment. Through the action of searching words or phases in source code of web page from previous history or specific webpages that title is not memorized, user can effectively recover important information which is originally forgotten and may be permanently lost.
Concise summary: It is operated through obtention and process of source code of webpage, and used in procurement, research scope and Internet scope. Under source code recording environment, the information can be recovered which is originally forgotten and may be permanently lost.

VII) Reports Statistics:
Report has various user permission rights, the system will display monthly or period of client and company report which includes summary and detailed information of various statuses of file, e.g.: report of company and department, sales commission, case distributions and analysis, assignment & payment record.

- Monthly assignment & transfer staff report - Report has various user permission rights, the system will display different file types statistics of all staff report by year, month and individual client criteria. Report will show the assigned phenomenon of payment amount during a certain number of days. The system will show the number of total assigned cases, assigned amount and statistics of payment percentage.

- Company and project handler commission report - Report has various user permission rights, the system will display and show summary of all or individual staff's commission report by year and month which includes client relative commission rate, total payment amount, rate and commission.

- Sales commission report - Report has various user permission rights, the system will display and show all or individual sales executive's commission report by year and month. Sales commission is calculated either by rate of client payment or rate of company commission of client. Report will show summary and detailed fields of project file information and client information, client type, payment amount and number of payment of client cases.

- Staff forecast report - Report has various user permission rights, the system will show team staffs' project payment, promised to pay payment, waiting confirm payment information by year and month. The report will generate data and show forecast amount, number of cases, and calculate accomplished percentage of current target and predict accomplished percentage.

- Client project status report - Report has various user permission rights, the system will display monthly client report of original and newly assigned, returned, closed cases as well as summary of total assigned amount, payment amount, balance and detailed information of above types of file.

- Company monthly assignment & payment report : Report has various user permission rights, the system will display all clients' different file types statistics report by year, month. Report will show the assigned phenomenon of payment amount during a certain number of days. The system will show the number of total assigned cases, assigned amount and statistics of payment percentage.

- Company assign project report - According to assigned user purview, the system will display all or individual staff report by year and month which show all clients' various status file amount and statistics.

- Sales client project report - Report has various user permission rights, the system will display all or individual file type by year and month which show all assigned cases' assign information, amount and commission statistics.

- Sales visit report - Report has various user permission rights, the system will display report by year, month, related staff and show project payment amount or sales visit phenomenon and analysis.

XIII) User Mailbox:

- The system has mailbox, send box function, user can send message to company internal system's single or multiple users, user can check the icon besides file case number of each task list to leave message. User can also tick and record reading status of message and set the number of message that each page show.

- User mailbox advanced version: certain business of HKDS NET 's client support "advanced version", besides the function of searching and checking multiple files for change status of case or transfer case, the system supports the function of searching and checking multiple files for leaving messages. Tailor-made version also supports VPN and mobile functions.

IX) Fingerprint Attendance Management:

- Fingerprint attendance information backup: According to system user permission right, the system can show and synchronize staff attendance data which can back up with spreadsheet.

- Fingerprint attendance list: Includes scheduling table function, clock in and clock out information and approval function. The attendance list is selective by company, department, type, staff code, period that show information of staff late, overtime, absence and vacation information etc.

Thank you for choosing TVCS System!