

FEATURES & FUNCTIONALITIES  
FLP<sup>®</sup> CUSTOMER RELATIONSHIP MANAGEMENT



## SOLUTION FOR LONG-LASTING CUSTOMER RELATIONSHIP

Customer relationship management is important for integrating company business processes that have direct interaction with customers, such as customer support, field support, marketing, sales, and purchasing. When customer relationship is maintained effectively, it will encourage buyer to come back, ensure quality pre-sales and post-sales service, build a brand and drive customer loyalty. These tasks cannot be achieved easily and effectively without the help of a software solution.

FLP<sup>®</sup> Customer Manager is not just another sales tool, but instead, it offers a convenient way to understand customer's needs, interests and expectations. It empowers sales people, marketers, customer service agents and senior management with a complete view of leads and customers, so that sound business decisions based on customer profile, demand trends, order history, business relations, and so on can be made effectively to provide customers with the products and services they want most. As such, long-lasting customer relationship will readily be maintained, which will help to drive additional revenue.

NO MORE DUPLICATED EFFORTS,  
NO MORE NEGLECTED CUSTOMERS

Without FLP<sup>®</sup> Customer Manager, customer information could be scattered across many databases, servers, and desktop hard drives in different departments such as sales, marketing, customer service, and accounting. Customer information is fragmented, those who need it cannot access it easily, sales representatives may make duplicate sales calls to some prospects, while forgetting to contact others.

FLP<sup>®</sup> Customer Manager does not adopt traditional 'module' approach. All the series of FLP<sup>®</sup> solutions (e.g. FLP<sup>®</sup> Document Manager, FLP<sup>®</sup> Human Resources Manager, FLP<sup>®</sup> Accounting Manager etc.) are based on real life situation that each functional manager multi-dimensionally interacts with each other and the design of FLP<sup>®</sup> solutions is founded on this solid and modern approach. New information entered will be effective immediately throughout the system, hence, no more duplicated efforts, and no more neglected customers.



## GLOBAL CUSTOMER RELATIONSHIP

FLP® Customer Manager distinguishes itself in the software market as the system is using the latest world-class IBM® Lotus® Domino® technology. To establish additional customer relationship by forming additional teams in overseas offices cannot be easier when FLP® Customer Manager is being used. No printing of extra stationery is required. No new system is necessary. PC workstations, local area network and Internet broadband connection are all you need to establish customer relationships anywhere globally.

### COLLABORATION PLATFORM TO FOSTER TEAMWORK, SHARE WORK AND INFORMATION

FLP® Customer Manager is founded on IBM® Lotus® Domino®, true collaboration and groupware platform. For example, it enables the tracking of an opportunity throughout the whole sales cycle, resulting in greater transparency and control of the sales process; once a lead is identified, there is no need circulating papers and sales

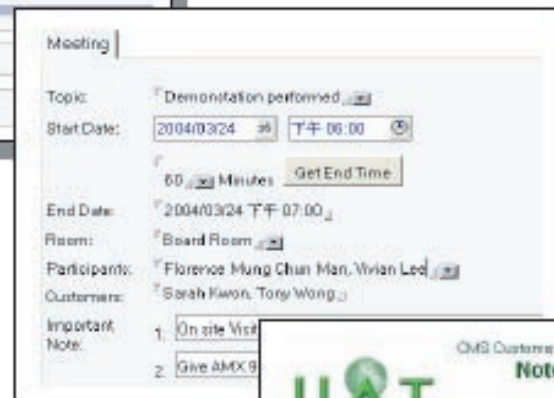
force with required knowledge and experience can follow up at once. Error and omission is reduced to minimum and the efficiency is increased.

TYPE ONCE; USE MANY; MANY CAN USE; ANYTIME; ANYWHERE

Data is only entered once and when a change is made, even if it is just a change in customer address, the information is updated throughout the whole system.

### READY FOR CUSTOMIZATION

No two companies are alike, and their unique business practices are a source of competitive advantage, FLP® Customer Manager is ready for cost-effective customization to reflect company culture and address specific industry needs. As rapid development tool is being used, customization is typically completed within three months.



## CUSTOMER FILE MANAGEMENT

Customer profile, contact person details, past dealings such as proposals, quotations, presales activities, order history, project agreement and meeting minutes etc. are valuable customer knowledge for composing marketing plans, sales strategies, and post-sales service plans etc.

## CUSTOMER PROFILE MANAGEMENT

Company particulars, contact person name, position, email address, payment terms, credit limit, product demand, potentiality, and so on are helpful information to understand customer's individual needs, requirements and demand trends.

**Customer**  
Basic | Potential | Order

Company Name: Ultra France Limited  
 公司名稱: 威爾斯  
 Phone: 3198 3378  
 Fax: 3541 8268  
 Web Site: www.ufc.com

Contact | Address | Business | Product | Remark | Owner

First Name	Last Name	Position	Mobile	Email	Phone	Fax
Alan	Chan	HR, Business Development Manager	9770 0080	alan.chan@ultrafrance.com.hk	3198 3378	3541 8268
Carrie	Lau	Chief Financial Officer		carrie.lau@ultrafrance.com.hk	3198 3378	3541 8268
Grace	Leung	Director, Human Resources & Administration		grace.leung@ultrafrance.com.hk	3198 3117	3541 8268
Joe	Chan	Managing Director, Business Development	0041 8787	joseph.chan@ultrafrance.com	3198 3378	3541 8268
Stephanie	Chan	HR & Administration Manager, Asia Pacific		stephanie.chan@ultrafrance.com	3198 3378	3541 8268

**Customer**  
Basic | Potential | Order

Product Line

Product Line	Potentiality
Document Management	20% Chance
Human Resources Management	40% Chance

Contact | Address | Business | Product | Remark | Owner

Product Demand

Product Demand	Supplier
FLP Document Manager	Ultra Active Technology Limited
FLP Human Resource Manager	Ultra Active Technology Limited
HRM220 server	RM (Hong Kong) Limited

**Customer**  
Basic | Potential | Order

Quality:  Good

Source:  Referral

Source Event:

User Type:  End User

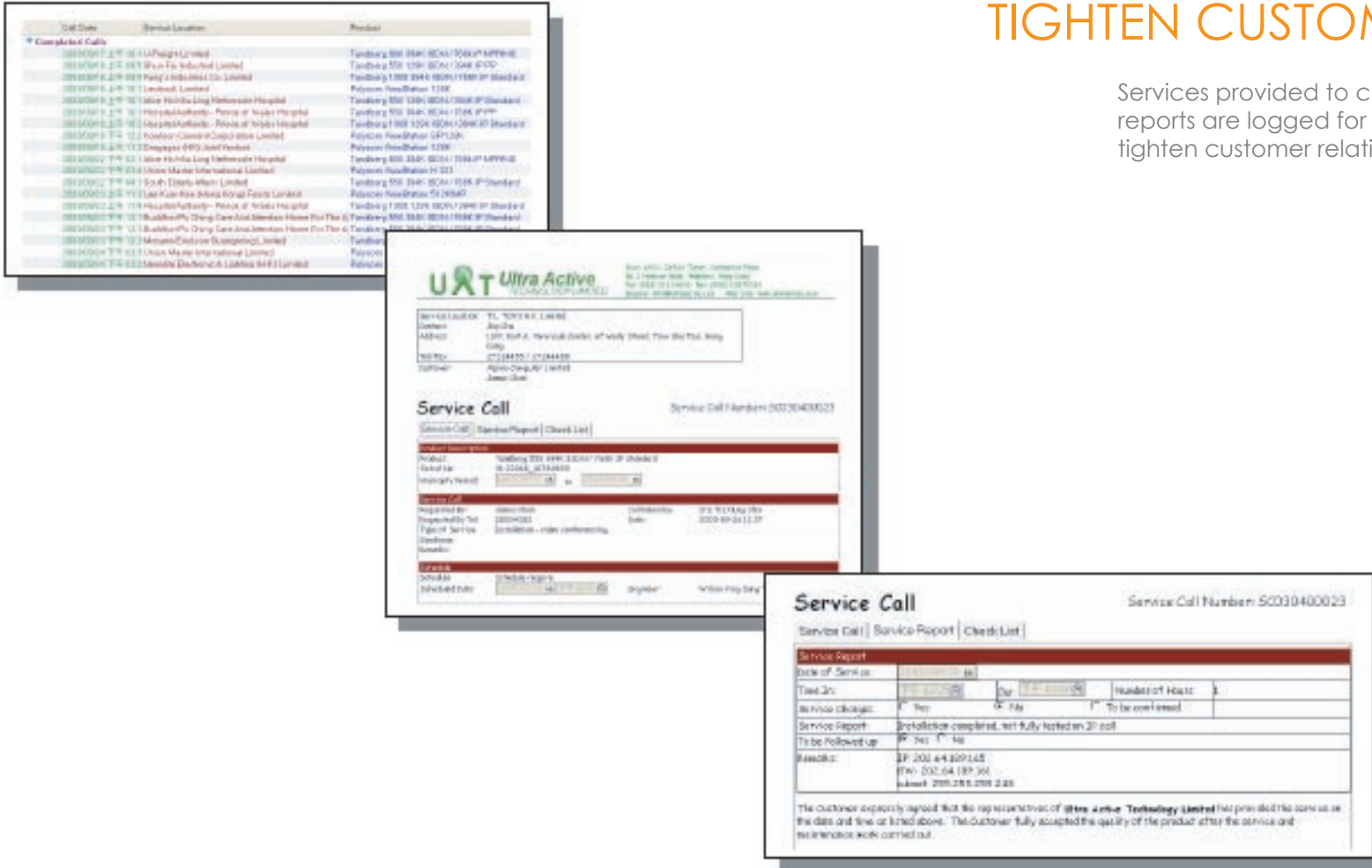
Payment Term:  30 days

Delivery Term:

Credit Limit:

# TIGHTEN CUSTOMER RELATIONSHIP


Services provided to customers and corresponding service reports are logged for easy review and future follow up to tighten customer relationship.



## PROFIT ANALYSIS TO IDENTIFY VALUABLE CUSTOMERS

Help to identify the best, most valuable customers and allocate company resources accordingly.

Invoice	Product	Cost HKD	Price HKD	Profit HKD
▼ SI030400280	Polycm SoundStation Standard	0.00	3,505.00	3,505.00
▼ SI030400282	Tandberg 880 384K 8DN   768k IPNPPM8	72,740.77	79,041.30	6,300.53
▼ SI030400283	Tandberg 500 216K 8DN   384k IPPP	38,152.92	42,053.84	3,910.92
▼ SI030400284	Polycm SoundStation Standard	0.00	3,500.00	3,500.00
▼ SI030400285	Tandberg 880 384K 8DN   768k IPNPPM8	72,740.77	113,890.00	41,149.23
	Tandberg 880 384K 8DN   768k IPNPPM8	72,740.77	113,890.00	41,149.23
	Tandberg 880 384K 8DN   768k IPNPPM8	72,740.77	113,890.00	41,149.23
	Tandberg 880 384K 8DN   768k IPNPPM8	72,740.77	113,890.00	41,149.23
▼ SI030400286	Polycm SoundStation Premier EX w/1mic	0.00	3,000.00	3,000.00



CMG Logistics  
**Profit**

System Developer  
20080719-19-02132

Invoice: SI030400283  
Delivery Note: DE030400280

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**Print**

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**Invoice**

Invoice Date: 2003/08/26

Customer: Technic Engineering & Consultant Limited 00004402

Contact: Lawrence Tse 004480

Address: Room 2600-E, Century Centre, 117 Hurlingham Street, Tsim Sha Tsui, Hong Kong

Tel: 29432029 | 80097678

Fax: 29432277

Status: Not Paid

Person:

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Product	Cost Price (HKD)
Product: Tandberg 500 216K 8DN   384k IPPP	Cost: HKD 38,152.92
Product Code: P0000741	Selling Price: HKD 42,053.84
Product Family:	
Serial Number: 0121023_0174402	

## CUSTOMER NEED EXPLORATION

Product	Item Number	Contract Number	Start Date	End Date
<ul style="list-style-type: none"> <li>Starbuck-Hans Dendgong BV</li> <li>Starbuck-Macmillan C&amp;L Limited (HK)</li> <li>Starbuck (HK) Co., Limited</li> <li>Starbuck of America MT &amp; SA</li> <li>Starbuck of America N.A.</li> <li>Starbuck of America (Asia) Limited</li> <li>Starbuck of China</li> </ul>				
* Multi-Operated				
* With service start on Page 18 Page				
ABOULEY P&G (China) Co., Ltd. (Guangdong) (HK) (HK)	840111814004	8404051100	20040101	20050101
Cometech France Mobile V9-4301L 3.0 S&W	722680	8404051100	20040101	20050101
Cometech France V9-4301AV Distributor 1 to 2	722623	8404051100	20040101	20050101
Polysar in Yiwu/Shenzhen 32 JK	82395000000040	8404051100	20040101	20050101
* Enabled				
* With service start on Page 18 Page				
Polysar in Yiwu/Visual PC Concept	8281308004000	8403048300	20030601	20040601
Polysar in Yiwu/Visual PC Concept	8281308004004	8403048300	20030601	20040601
Polysar in Yiwu/Visual PC Concept	8281308011014H	8403048300	20030601	20040601
Starbuck of China 8-ling Kcaol Limited				
Starbuck of America Representative Office				
Starbuck-Gaomon (Asia) Limited				
Starbuck-Gaomon (Asia) Limited				

**UAT**  
Ultra Active  
TECHNOLOGY LIMITED

Service Warranty Number: **8404051100**  
 Name: **Navy Gonzalez**

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**Service Warranty Information**

<b>Contract Information</b>	<b>Service Contract Information</b>
Contract Date: <input type="text"/>	Contract Number: <input type="text"/>
Product: <input type="text"/>	Contract Date: <input type="text"/>
Serial Number: <input type="text"/>	Serial Number: <input type="text"/>
Start of Service: <input type="text"/>	Start From Page: <input type="text"/>
Duration of Service: <input type="text"/>	Contract Number: <input type="text"/>
Product Service Period: <input type="text"/>	Contract Date: <input type="text"/>
Vendor's Coverage: <input type="text"/>	Contract Number: <input type="text"/>

Details of products or services provided to customers are shown on the customer service reminder view. Pleasant customer relationship can be maintained by reminding customer the expiration date of the service warranty, or suggesting new products or service plans that will suit customer's individual needs.

**UAT Ultra Active**  
TECHNOLOGY LIMITED

Room 1103, 2/F, Wing Lok Commercial Bldg,  
 No. 1, Nathan Road, Mong Kok, Kowloon  
 Tel: (852) 4111-8888 Fax: (852) 4178-1116  
 E-mail: info@uat.com.hk www.uat.com.hk

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Service Warranty Number: **8404051100**

**UAT Services Terms and Conditions**

Ultra-Active Technology Limited (hereinafter "UAT"), provides the following services on our current product lines to the customer under the following terms and conditions:

- Maintenance of Equipment refers specifically to our range of products specified in paragraph 10. The guarantee service does not cover the repair and replacement of internal, connecting cables or standard accessories and other accessories connected cables.
- UAT provides routine service during the times set out for the class of maintenance you have selected:
 

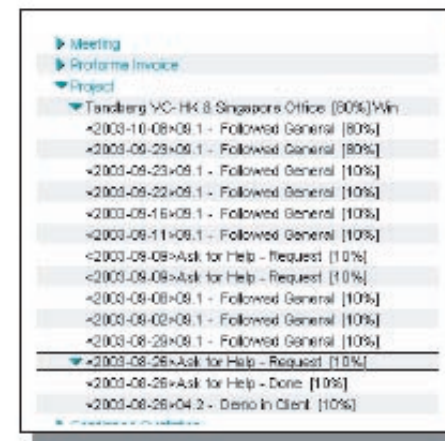
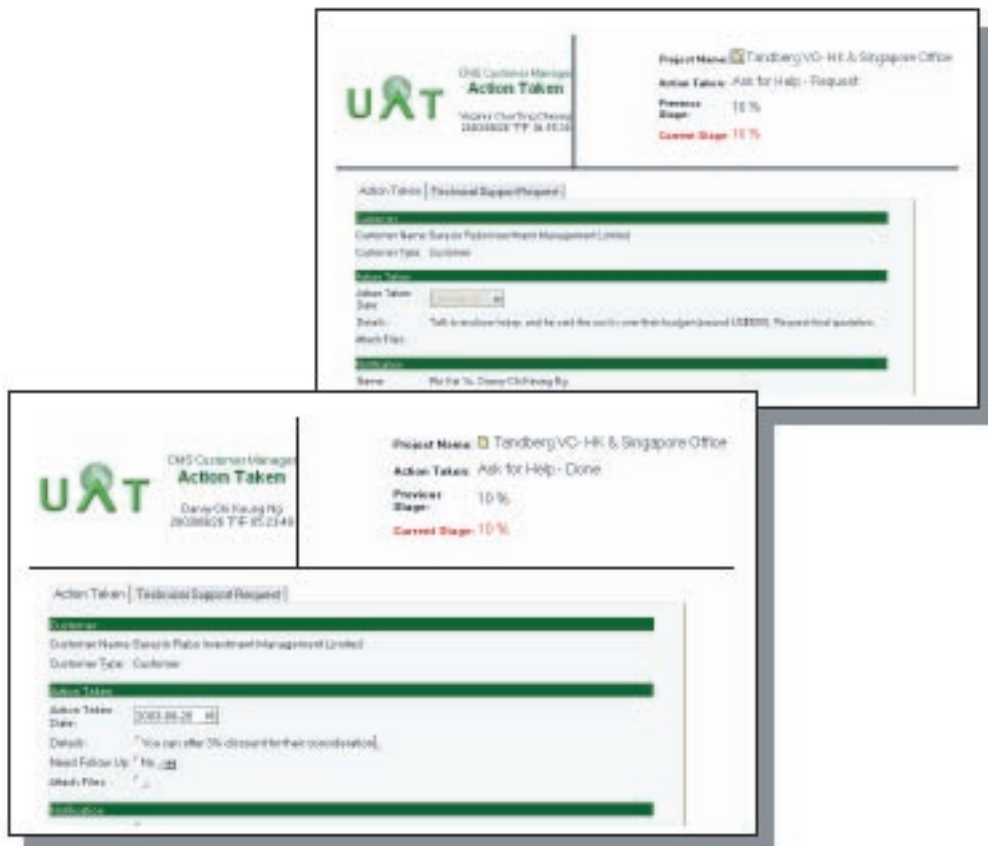
<b>Deluxe Classic:</b>	Monday to 7 days	8:00 to 10:00 (Hong Kong time)
<b>Gold Classic:</b>	Monday to 7 days	8:00 to 21:00 (Hong Kong time)
	Saturday	8:00 to 12:00 (Hong Kong time)
<b>PLM Basic Classic:</b>	Monday to Saturday	24 Hours

Note: The above coverage does not include outdoor, public holidays and times when Typhoon 8 or higher is needed or during any natural environmental disaster such as "Black Rain" light, flooding, etc.



## TEAMWORK TO WIN SALES

On-going sales status can be monitored and, if required, juniors can seek advice from their supervisors or seek assistance across different teams or departments.



## JOURNAL FOR PAST DEALINGS

Submitted drawings, proposed project schedules, photographs of completed installations, details of goods sold and delivered etc. can be retrieved readily for better understanding of customer, anticipation of customer needs and development of effective customer strategies.

- ▶ Bank of Butterfield
- ▼ Bank of China
  - ▶ Basic
  - ▶ Branch
  - ▶ Contact
  - ▶ Conversation
  - ▼ Journal Entry
    - <2006-12-16> Bank of China Wiring Diagram
    - <2003-04-08> Equipment serial no
    - <2003-01-13> 6 Dec 2002 site visit details
    - <2002-12-08> ISDN line No.
    - <2002-12-04> Service form of France Bank of China Project
    - <2002-08-20> BOC Paris Project
    - <2002-04-19> Checking Report
    - <2002-03-09> Confirmed order product list
    - <2001-12-09> Photo of plasma in dealing room
    - <2001-12-09> Photo of equipment
    - <2001-12-09> Photo of Conference Room
    - <2001-11-20> Proposed ATM Control System Overview

Calendar view showing service assignments for January 2005. The interface includes navigation tabs for Day, Week, and Month, and a 'Forecast' section for the current month.

Day	Time Slot	Technician	Company
Monday (2005年1月24日)	10:00	Henry	Baidu Hong Kong Limited
Monday	10:00	Shelton	Jordan Technology Corporation Limited
Monday	11:00	Rebecca	Plastic Indicators (Hong Kong) Limited
Monday	14:30	Henry	Clear Pro International Limited
Monday	14:30	Shelton	Jordan Technology Corporation Limited
Tuesday (2005年1月25日)	10:00	Shelton	Hypercon Asia Limited
Tuesday	10:00	Henry	Triumph International (Overseas) Limited
Tuesday	10:30	Eric	Asia Style Intimale Apparel Limited
Tuesday	10:30	Eric	Asia Style Intimale Apparel Limited
Tuesday	14:00	Henry	Pacific Carbury Systems Limited
Tuesday	15:00	Shelton	LA Freight Limited
Tuesday	16:30	Henry	Asian Pacific Education Centre Limited
Wednesday (2005年1月26日)	10:30	Rebecca	BIG Asia Pacific Limited
Wednesday	10:30	Shelton	CHINESE SCIENTIFIC (CHINA) LTD
Wednesday	10:30	Shelton	CHINESE SCIENTIFIC (CHINA) LTD
Wednesday	10:30	Shelton	CHINESE SCIENTIFIC (CHINA) LTD
Wednesday	12:50	Shelton	Malayan Palm Oil Press (MPOC)
Wednesday	14:30	Shelton	Jordan Technology Corporation Limited
Wednesday	15:30	Henry	Metpac Inter-Asia Trading Limited
Thursday (2005年1月27日)	10:30	Shelton	Asia Style Intimale Apparel Limited
Thursday	10:30	Henry	Bridge Executive Centre
Friday (2005年1月28日)	10:00	Shelton	South China House IT Technology Consult
Friday	11:00	Rebecca	Clear Pro International Ltd
Friday	14:30	Shelton	South China House IT Technology Consult
Friday	15:00	Henry	Ameyko Sourcing Partners Limited
Saturday (2005年1月29日)	10:30	Henry	Egno-Huawei, Corp. Limited
Saturday	10:30	Shelton	Berkeley Capital Asia Limited
Saturday	10:30	Shelton	Berkeley Capital Asia Limited

## ALIGN RESOURCES TO SERVE CUSTOMER EFFICIENTLY

Allow customer support executive to effectively assign service tasks to team members with the required knowledge to fulfill the assignment, and company resources can be efficiently utilized. Scheduled assignments are shown in a calendar view.

Service Call form details:

- Service Location:** Hypercon Asia Limited
- Contact:** Mr. Eric Auk
- Address:** 23/F, Metro Center, 22 Lam Hong Street, Tsim Sha Tsui, Hong Kong
- Tel/Fax:** 23 850569 / 23618910
- Customer:** Hypercon Asia Ltd, Mr. Eric Auk

**Service Call** (Service Call Number: 50240501996)

Product Information: Product: Polycon Installation SYSTEM, Item # NO: 5022822400048, Warranty Period: 12 Months

Service Call Details: Requested By: Eric Auk, Requested By Tel: 23850569, Type of Service: Inspection - Mobile checking, Remarks: setup the repaired equipment and collect item unit

Schedule: Scheduled Date: 2005-01-27, Engineer: Shelton Au Fun Chan

```

<<Today>>

<<Company>>,
<<Room>>, <<Floor>>,
<<Building>>,
<<Road>>,
<<District>>, <<Country>>

Dear <<Formal Name>>,

Thank you very much in attending our seminar on the 15th January, 2005, for using
FLP Enterprise Management System to enhance your overall organization productivity.

We look forward to becoming your valuable partner in streamlining your business
processes. Feel free to contact us should you need further information.

Sincerely

Michael Thomson
Chief Executive Officer
Ultra Active Technology Limited
Tel: 3111 9600

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## MAIL MERGE TO NOURISH CUSTOMER RELATIONSHIP

Regular communication with customer by mail is another way of nourishing pleasant customer relationship. Mail merge is a very useful tool when you have a standard letter format and selectively circulate the letters to your customers for product promotion and seasonal greetings etc.

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6th January, 2005

Adam Smith Company Limited,
Room 1813, 18/F.,
International Finance Center,
18 Harbour Road,
Wan Chai, Hong Kong

Dear Mr. Victor Lee,

Thank you very much in attending our seminar on
FLP Enterprise Management System to enhance

We look forward to becoming your valuable partner
processes. Feel free to contact us should you need

Sincerely

Michael Thomson
Chief Executive Officer
Ultra Active Technology Limited
Tel: 3111 9600

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6th January, 2005

Debin Company Limited,
Room 1612, 16/F.,
Prosperous Building,
21 Canton Road,
Tsim Sha Tsui, Hong Kong

Dear Ms. Mary Wong,

Thank you very much in attending our seminar on the 15th January, 2005, for using
FLP Enterprise Management System to enhance your overall organization productivity.

We look forward to becoming your valuable partner in streamlining your business
processes. Feel free to contact us should you need further information.

Sincerely

Michael Thomson
Chief Executive Officer
Ultra Active Technology Limited
Tel: 3111 9600

```

## QUICK RESPONSE TO BILLING ENQUIRY

All outstanding bills and associated amounts can be listed on screen. Details of the billing information, such as contact data, goods sold and prices, can instantly be displayed on screen for quick response should customer enquire details about his bill.

The screenshot displays a CRM interface with two main components: a detailed sales invoice and a list of outstanding bills.

**Sales Invoice Details:**

- Company:** Expert De Corp (Far East) Limited
- Contact:** Mr. Ray La
- Address:** 11/F, One Lane Chong (Colony) Building, 11 Yik Yik Street, Tai Kwai, Hong Kong
- Phone:** (852) 311 0647 / 0231 1520
- Sales Invoice Number:** SID-48000796

**Sales Invoice Table:**

Our Code	Description	Price in HK\$	Qty	Amount
FB001241	Timberg 6095 MPF Code SA 5804 / 4M TP 10FF 0.5	227,200.00	1	227,200.00
FB000630	Timberg Table Microphone	0.00	1	0.00
FB001259	Timberg WAVE 12 Camera P&L	0.00	1	0.00
FB001412	Timberg Pioneer 50" 757-510061	43,500.00	2	87,000.00

**Outstanding Bills List:**

Invoice Number	Company	Invoice Date	Invoice Type	Amount
S1040500748	PCW-HKT Network Services Limited	2004/12/30	Invoice	120,665.00
S1040500751	MCI Conferencing	2004/12/30	Invoice	6,900.00
S1040500796	Expert De Corp (Far East) Limited	2005/02/01	Invoice	319,200.00
S1040500797	Expert De Corp (Far East) Limited	2005/02/01	Invoice	44,700.00
S1040500826	MIS Technology Project Limited	2005/01/18	Invoice	54,000.00
S1040500844	Expert Systems Limited	2005/01/21	Invoice	8,000.00
S1040500845	Expert Systems Limited	2005/01/20	Invoice	6,750.00
S1040500857	Barclays Capital Asia Limited	2005/01/28	Invoice	22,700.00

## ONLINE PRODUCT INFORMATION

Product or service information can be retrieved online immediately for reference.

Category	Product Description	Product ID	Price	Currency	Price in USD	Product Details
▶ Plasma						
▶ Polycam/Power						
▶ Polycam ShowStation						
	Polycam ShowStation A/V Support card	SS-39-0001-2	15,800.00	HKD	1,000.00	Support VGA, SVGA, XG
	Polycam ShowStation IP	SS-39-0001	70,000.00	HKD	18,000.00	
	Polycam ShowStation Network Support card	SS-39-0001-1	3,800.00	HKD	500.00	Support Communication
▶ Polycam Sound						
▶ Polycam Video						
▶ Printer						
▶ Projector						
▶ Promotion						
▶ Redirection						
▶ Recorder						
▶ Scanner						
▶ Screen						
▶ Security System						
▶ Service - ClearOne						
▶ Service - Navipointer (Quotation & Invoice use Only)						
▶ Service - Others (Quotation and Invoice use only)						

Product Information	
<b>Product Details</b>	
Product ID	SS-39-4801
Vendor Product Code	2299-85280-822
Product Description	Polycam ShowStation IP
<b>Product Description Details</b>	
<b>Product Cost</b>	
Unit Cost	78,800.00
Currency	HKD
Unit Cost in USD	18,800.00
(gross P9 to update)	
Discount in %	10%
<b>Product Comments</b>	
*Necessary Service Covered By Under WAT	
<b>Product Connections</b>	
Connections: None	

The screenshot displays a web-based configuration interface for document management. At the top, there are 'Edit' and 'Close' buttons. The interface is organized into several sections:

- Basics:** Contains fields for 'Path and Name' (flpdata\mrdocumeav.nsf) and 'Form Name' (Document).
- Owner:** Contains a field for 'Owner Field' (DocumentHolder).
- Principal Form Name:** Contains a field for 'Principal Form Name'.
- Navigation:** A set of tabs including 'Document Access' (selected), 'Document Flow', 'Field Access', and 'Document Revision'.
- View / Edit Document:** A table defining permissions for different user roles.
- Add / Delete Document:** A table defining permissions for adding and deleting documents.

View / Edit Document		
	View	Edit
Owner:	Allowed	Allowed
Creator:	Allowed	Allowed
Server:	Allowed	Allowed
Server Administrator:	Allowed	Allowed
Owner's Supervisors:		
Additional Allowed Person / [Role]:	/ [DeptRepresent]	/ [DeptRepresent]
Except Person / [Role]:	/	/

Add / Delete Document		
	Add	Delete
Owner:	Not Applicable	Allowed

## EMAIL AND CALENDARING

Integrated with Lotus Notes email and calendaring to streamline communication and scheduling processes. Once a task assignment has been made, it is marked on the group calendar for action and easy followup.

## SECURITY

Access control maintenance to allow user only sees relevant and role-based information. Access control can be set up to decide which fields, screens, databases and which records users can access and whether those users can view only or modify information held on the system. Audit trail function allows authorized user to identify who made each change by date, time, and type of change in an easy understandable way.



#### BUILT-IN IBM BEACON AWARD WINNING REPORT WRITER

Built-in with the report writer 'IntelliPRINTPLUS', an 'IBM Beacon Award' winner, to let user define reports for easy analysis and better business insight.

#### SEAMLESSLY INTEGRATED WITH OTHER FLP SOLUTIONS

FLP<sup>®</sup> Customer Manager can be integrated with other FLP<sup>®</sup> solutions to provide a total solution for streamlining business processes and raise overall organization productivity, for example:

- FLP<sup>®</sup> Accounting Manager
- FLP<sup>®</sup> Human Resources Manager
- FLP<sup>®</sup> Document Manager
- FLP<sup>®</sup> Logistics Manager
- FLP<sup>®</sup> Dairy Manager



# FLP® BUSINESS MODEL

## A FOUNDATION FOR YOU TO BUILD YOUR OWN BUSINESS MODEL

No two companies are the same even conducting the same business in the same industry. Why should you choose a standard software package.

No other software solutions provide more feature and functions than FLP® does costeffectively. No other software solutions provide such an all-in-one interface integrating with your company wide company business processes. FLP® provides a market leading collaboration platform for all your company staff to work on anytime, anywhere with unlimited scalability without physical country border barriers over the Internet.

What's more, FLP® shares our experience with you to customize the software applications to suit your business and prepare for the future.

FLP® is empowered by IBM® Lotus® Domino®/Notes® technology.

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