

SALES AND STOCK CONTROL (SSC)

WEB USER GUIDE

SYSTEM MAINTENANCE



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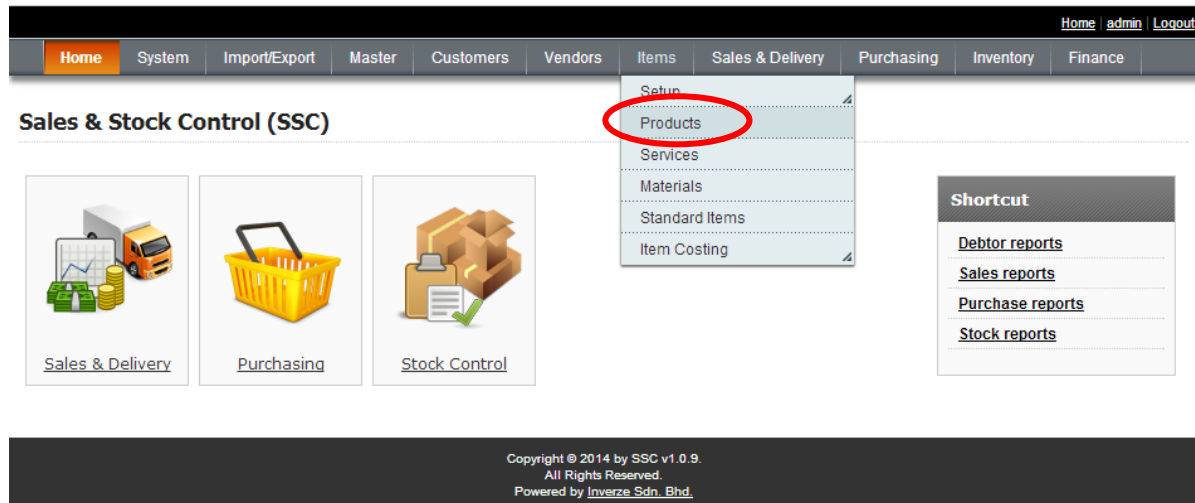
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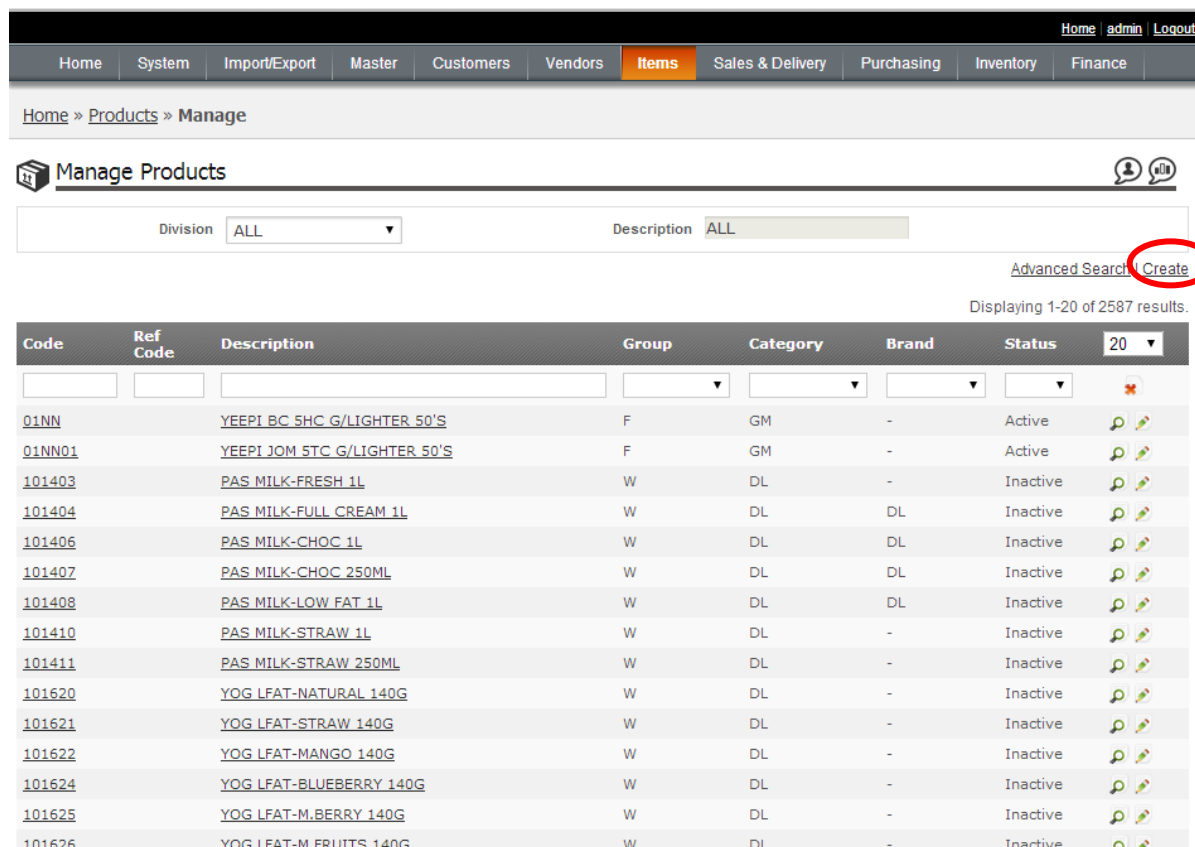
ITEM MAINTENANCE

Products

Create Products



1. Click Products.



2. Click Create.

Create Product

Fields with * are required.

General

Code * 102110001Ref Code
Description * Coca Cola
Type * ProductStatus * Active
Group * WCategory -
Brand -
UOM * UNITLocation * COUNTRY
Stock Currency * RMStock Valuation Type Standard

Attributes

Is Sales Item ☒Is Purchase Item ☒
Is Service Item ☐Is Stock Item ☒

GL Accounts

GL A/C SalesGL A/C Sales Return
GL A/C Cash SalesGL A/C Purchase
GL A/C Cash PurchaseGL A/C Purchase Return

Extra Fields

CreateCancel

3. Fill in the relevant information of the item.
4. Click Create.

✓ Data saved...

Update Product : 102110001

CREATED : admin [2014-07-11 16:20:07]

LAST UPDATED : admin [2014-07-11 16:20:07]

Fields with * are required.

General

Code * 102110001Ref Code
Description * Coca Cola
Type * ProductStatus * Active
Group * WCategory -
Brand -
UOM * UNITLocation * COUNTRY
Stock Currency * RMStock Valuation Type Standard

Attributes

Is Sales Item ☒Is Purchase Item ☒
Is Service Item ☐Is Stock Item ☒

Sales Settings

Min. Order Qty 0.00 UNIT
Sales UOM * UNITEnforce mobile sales UOM

Purchase Settings

Purchase UOM * UNIT

5. A message will show the Item created.

Attributes

Is Sales Item ☒ Is Purchase Item ☐
Is Service Item ☐ Is Stock Item ☒

Sales Settings

Min. Order Qty UNIT
Sales UOM * Enforce mobile sales UOM ☐

Purchase Settings

Purchase UOM *

Inventory

Reorder Level Reorder Qty
Shelf Shelf Life
Dimension

GL Accounts

GL A/C Sales GL A/C Sales Return
GL A/C Cash Sales GL A/C Purchase
GL A/C Cash Purchase GL A/C Purchase Return

[Save](#) [Delete](#) [Close](#)

6. Fill in the packing size info in the Dimension box.

UOM & Division Settings

[UOM Setting](#) [Division List](#)

[Create](#)

Displaying 1-1 of 1 result.

UOM	UOM Rate	Blocked
UNIT	1.0000	

Price Settings

[Price List](#) [Purchase List](#)

[Create](#)

Price Group	UOM	Currency	Unit Price	Valid From	Valid To
No results found.					

Image

[Pictures](#)

[Add image](#)

Picture	Description
No results found.	

7. UOM Setting – click Create.

 **Create Item UOM - 102110001**  

Fields with * are required.

General

UOM * 
Normal Level UOM Rate
Reorder Qty Reorder Level
Blocked

UOM x

Displaying 1-10 of 44 results.

Code	Description
☐ UNIT	UNIT
☐ GRAM	GRAM
☐ METER	METER
☐ PC	PC
☒ BOX	BTL
☐ CTN	BTL
☐ PKT	PKT
☐ CUP	CUP
☐ TUB	TUB
☐ BOT	BOT

Go to page: < Previous **1** 2 3 4 5 Next >

Ok Cancel

8. Click on the magnifying glass to choose the UOM.
9. Tick on the UOM and click OK.

Create Item UOM - 102110001 [User Icon] [Help Icon]

*Fields with * are required.*

General

UOM * [Magnifying Glass] UOM Rate
 Normal Level Reorder Level
 Reorder Qty
 Blocked

Create Cancel

Item UOM

Displaying 1-1 of 1 result.

UOM	UOM Rate	Up-to-date Cost	Average Cost
UNIT	1.0000	0.0000	0.0000

10. Fill in the UOM rate. Then, click Create.

✓ Data saved...

Create Item UOM - 102110001 [User Icon] [Help Icon]

*Fields with * are required.*

General

UOM * [Magnifying Glass] UOM Rate
 Normal Level Reorder Level
 Reorder Qty
 Blocked

Create Cancel

Item UOM

Displaying 1-2 of 2 results.

UOM	UOM Rate	Up-to-date Cost	Average Cost
UNIT	1.0000	0.0000	0.0000
CTN	24.0000	0.0000	0.0000

11. A message will show the Data saved. Click Cancel.

UOM & Division Settings

UOM Setting **Division List**

Deleting | **Assign**

Displaying 1-1 of 1 result.

Item Division
☐ GENERAL

Price Settings

Price List **Purchase List**

Creating

Displaying 1-2 of 2 results.

Price Group	UOM	Currency	Unit Price	Valid From	Valid To	
-	UNIT	RM	0.2000	02-01-1970	19-01-2038	
-	CTN	RM	4.8000	02-01-1970	19-01-2038	

Image

Pictures

Adding image

Picture	Description
No results found.	

12. Division List – assign the item to division.

13. Click Assign.

Assign Divisions : 102110001

Displaying 1-6 of 6 results.

Code	Description
☐ ACCT	ACCOUNT DEPARTMENT
☐ DL	DUTCH LADY AGENCY
☐ FMK	FUMAKILLA AGENCY
☐ GBA	GBA CORPORATION SDN. BHD.
☒ GENERAL	GENERAL AGENCY
☐ GM	GOODMAID AGENCY

Assign Close

14. Tick the division and click Assign.

Home » Products » 102110001 » Update

Division(s) assigned to item.

Update Product : 102110001

CREATED : admin [2014-07-11 16:20:07] LAST UPDATED : admin [2014-07-11 16:20:07]

15. A message will show the Division(s) assigned to item.

UOM & Division Settings

UOM Setting **Division List**

[Create](#)

Displaying 1-2 of 2 results.

UOM	UOM Rate	Blocked
UNIT	1.0000	 
CTN	24.0000	 

Price Settings

Price List **Purchase List**

[Create](#)

Price Group	UOM	Currency	Unit Price	Valid From	Valid To
No results found.					

Image

Pictures

[Add image](#)

Picture	Description
No results found.	

16. Price Settings – click Create.

Create Item Price : 102110001

*Fields with * are required.*

General

UOM * (Optional)

Price Group

Currency *

Unit Price

Valid From * 

Valid To * 

[Create](#) [Cancel](#)

Item Price

UOM	Price Group	Currency	Unit Price	Valid From	Valid To
No results found.					

17. Fill in the unit price, then click Create.

Home » Products » 102110001 » Create Item Price

✓ Data saved...

Create Item Price : 102110001

*Fields with * are required.*

General

UOM *

18. A message will show the data saved.

Create Item Price : 102110001

Fields with * are required.

General

UOM * (Optional)

Price Group

Currency *

Unit Price

Valid From * Valid To *

Create **Cancel**

Item Price

UOM	Price Group	Currency	Unit Price	Valid From	Valid To	
UNIT	-	RM	0.2000	02-01-1970	19-01-2038	 

Displaying 1-1 of 1 result.

19. Create item price for second UOM.

20. Click Create.

Home » Products » 102110001 » Create Item Price

✓ Data saved...

Create Item Price : 102110001

Fields with * are required.

General

UOM * (Optional)

Price Group

Currency *

Unit Price

Valid From * Valid To *

Create **Cancel**

Item Price

UOM	Price Group	Currency	Unit Price	Valid From	Valid To	
UNIT	-	RM	0.2000	02-01-1970	19-01-2038	 
CTN	-	RM	4.8000	02-01-1970	19-01-2038	 

Displaying 1-2 of 2 results.

21. A message will show the data saved.

22. Click Cancel.

UOM & Division Settings

UOM Setting | **Division List**

[Create](#)

Displaying 1-2 of 2 results.

UOM	UOM Rate	Blocked
UNIT	1.0000	 
CTN	24.0000	  

Price Settings

Price List | **Purchase List**

[Create](#)

UOM	Division	Vendor	Currency	Unit Price	Valid From	Valid To
No results found.						

Image

Pictures

[Add image](#)

Picture	Description
No results found.	

23. Purchase List – create the item purchase price.

24. Click Create.

Home » Products » 102110001 » Create Item Cost

Create Item Cost - 102110001

Fields with * are required.

General

UOM *

Division *

Vendor (Optional)

Currency *

Unit Price

Valid From * Valid To *

[Create](#) [Cancel](#)

Item Cost

UOM	Division	Vendor	Currency	Unit Price	Valid From	Valid To
No results found.						

25. Fill in the purchase price, then click Create.

Home » Products » 102110001 » Create Item Cost

✓ Data saved...

Create Item Cost - 102110001

Fields with * are required.

General

UOM *

Division *

Vendor (Optional)

Currency *

Unit Price

Valid From *

Valid To *

Create

Cancel

Item Cost

UOM	Division	Vendor	Currency	Unit Price	Valid From	Valid To	
UNIT	GENERAL		RM	0.1200	02-01-1970	19-01-2038	 

Displaying 1-1 of 1 result.

26. A message will show the data saved.

Create Item Cost - 102110001

Fields with * are required.

General

UOM *

Division *

Vendor (Optional)

Currency *

Unit Price

Valid From *

Valid To *

Create

Cancel

Item Cost

UOM	Division	Vendor	Currency	Unit Price	Valid From	Valid To	
UNIT	GENERAL		RM	0.1200	02-01-1970	19-01-2038	 

Displaying 1-1 of 1 result.

27. Fill in the purchase price for second UOM.

28. Click Create.

Home » Products » 102110001 » Create Item Cost

✓ Data saved...

Create Item Cost - 102110001

Fields with * are required.

General

UOM *

Division *

Vendor (Optional)

Currency *

Unit Price

Valid From * Valid To *

Create

Cancel

Item Cost

UOM	Division	Vendor	Currency	Unit Price	Valid From	Valid To	
UNIT	GENERAL		RM	0.1200	02-01-1970	19-01-2038	 
CTN	GENERAL		RM	2.8800	02-01-1970	19-01-2038	 

Displaying 1-2 of 2 results.

29. A message will show the data saved.

30. Click Cancel once done.

UOM Setting

[Division List](#)

Create

Displaying 1-2 of 2 results.

UOM	UOM Rate	Blocked	
UNIT	1.0000		 
CTN	24.0000		 

Price Settings

[Price List](#) [Purchase List](#)

Create

Displaying 1-2 of 2 results.

UOM	Division	Vendor	Currency	Unit Price	Valid From	Valid To	
UNIT	GENERAL		RM	0.1200	02-01-1970	19-01-2038	 
CTN	GENERAL		RM	2.8800	02-01-1970	19-01-2038	 

Image

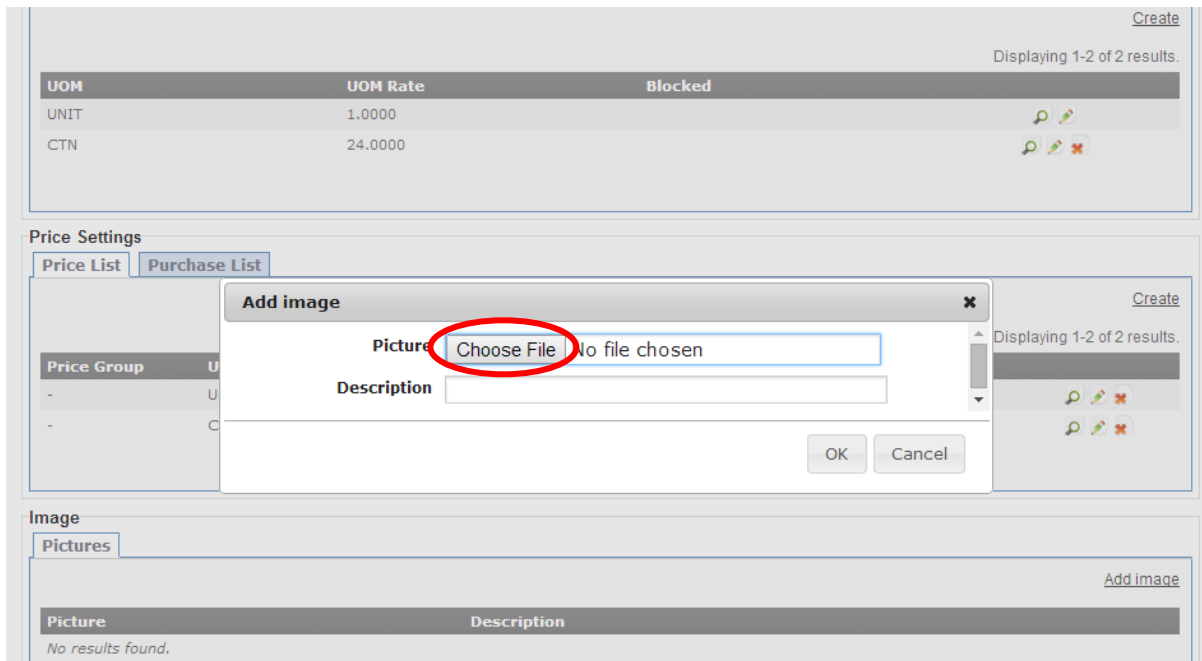
Pictures

Add image

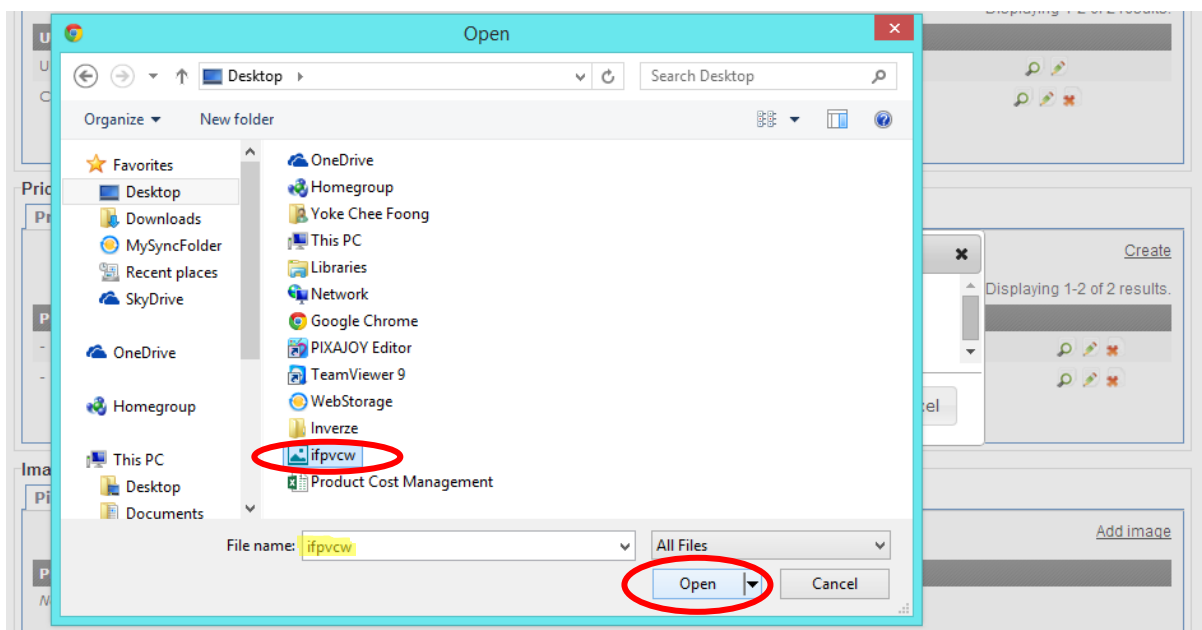
Picture	Description
---------	-------------

No results found.

31. Pictures – click Add Image to upload picture for the item.

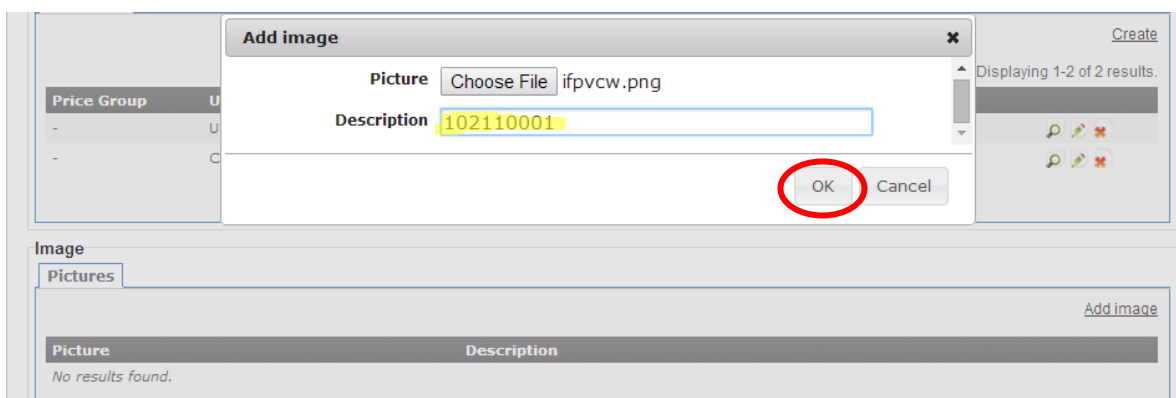


32. Click Choose File.



33. Select the image file to upload.

34. Click Open.



35. Fill in the Description, then click OK.

Home » Products » 102110001 » Update

Image added successfully.

Update Product : 102110001

CREATED : admin [2014-07-11 16:20:07]

LAST UPDATED : admin [2014-07-11 16:20:07]

36. A message will show the image added successfully.

Image

Pictures

[Add image](#)

Displaying 1-1 of 1 result.

Picture	Description
	102110001

37. Scroll down to Image section to view the image uploaded.

GL Accounts

GL A/C Sales

GL A/C Sales Return

GL A/C Cash Sales

GL A/C Purchase

GL A/C Cash Purchase

GL A/C Purchase Return

Extra Fields

Save

Delete

Close

38. Click Close.

Displaying 1-1 of 1 result.

Code	Ref Code	Description	Group	Category	Brand	Status
102110001						20
102110001		Coca Cola	W	-	-	Active

39. Click the glass to view or click pencil to edit.

Edit Products

[Home](#) | [admin](#) | [Logout](#)

[Home](#) | [System](#) | [Import/Export](#) | [Master](#) | [Customers](#) | [Vendors](#) | **Items** | [Sales & Delivery](#) | [Purchasing](#) | [Inventory](#) | [Finance](#)

[Home](#) » [Products](#) » **Manage**

Manage Products

Division: ALL | Description: ALL

[Advanced Search](#) | [Create](#)

Displaying 1-20 of 2587 results.

Code	Ref Code	Description	Group	Category	Brand	Status	20
01NN		YEEPI BC 5HC G/LIGHTER 50'S	F	GM	-	Active	
01NN01		YEEPI JOM 5TC G/LIGHTER 50'S	F	GM	-	Active	
101403		PAS MILK-FRESH 1L	W	DL	-	Inactive	
101404		PAS MILK-FULL CREAM 1L	W	DL	DL	Inactive	
101406		PAS MILK-CHOC 1L	W	DL	DL	Inactive	
101407		PAS MILK-CHOC 250ML	W	DL	DL	Inactive	
101408		PAS MILK-LOW FAT 1L	W	DL	DL	Inactive	
101410		PAS MILK-STRAW 1L	W	DL	-	Inactive	
101411		PAS MILK-STRAW 250ML	W	DL	-	Inactive	
101620		YOG LFAT-NATURAL 140G	W	DL	-	Inactive	
101621		YOG LFAT-STRAW 140G	W	DL	-	Inactive	
101622		YOG LFAT-MANGO 140G	W	DL	-	Inactive	
101624		YOG LFAT-BLUEBERRY 140G	W	DL	-	Inactive	
101625		YOG LFAT-M.BERRY 140G	W	DL	-	Inactive	
101626		YOG LFAT-M.FRUIT 140G	W	DL	-	Inactive	

1. Click on the pencil to edit a product details.

Import Items (Excel Template)

Download Item Master List

The screenshot shows the Inverze software interface. The top navigation bar includes tabs for Home, System, Import/Export, Master, Customers, Vendors, Items, Sales & Delivery, Purchasing, Inventory, and Finance. The 'Items' tab is selected, and a dropdown menu is open, showing options like Setup, Products, Services, Materials, Standard Items, Item Costing, UOM, Item Group, Item Category, Item Brand, Import Items, Import Items v2 (highlighted with a red circle), Import Service, Import Purchase Price, Import Sales Price, Import Service, and Import Stock Reorder. Below the navigation bar, the 'Sales & Stock Control (SSC)' section is visible, with icons for Sales & Delivery, Purchasing, and Stock Control. A 'Shortcut' box on the right lists reports like Debtor reports, Sales reports, Purchase reports, Stock reports, and Sales rep reports.

1. Go to ITEMS.
2. Select Setup.
3. Click Import Items v2.

The screenshot shows the 'Import Items' form. The 'Division' section includes fields for Division (General), Description (General), Company Name (LEAN TEIK SOON SDN. BHD.), and Export/Import Path (/home/ssc/general). The 'Details' section includes fields for IMPORT_ITEM.XLSX (Choose File), Mode (Update All (Attributes,Prices,Costs)), and Encoding (Chinese Simplified (GB2312)). At the bottom right, there are three buttons: Download (highlighted with a red circle), Upload, and Import.

4. Click DOWNLOAD.

The screenshot shows the 'Import Items' form after the download action. A red message bar at the top of the form area displays '1773 records exported' with an information icon. The form fields and buttons are the same as in the previous screenshot. Below the form, there is an 'Upload Files' section showing a file named 'IMPORT_ITEM.XLSX' with a size of 231,378 bytes and a timestamp of 2015-02-27 11:37:22.

5. A message in red will inform numbers of items already exported.

Home » Import/Export » Item » Import Items

1773 records exported

Import Items



Division

Division	General	Description	General
Company Name	LEAN TEIK SOON SDN. BHD.		
Export/Import Path	/home/ssc/general		

Details

IMPORT_ITEM.XLSX	Choose File	No file chosen
Mode	Update All (Attributes,Prices,Costs)	
Encoding	Chinese Simplified (GB2312)	

Upload Files

IMPORT_ITEM.XLSX	231,378 bytes	2015-02-27 11:37:22
----------------------------------	---------------	---------------------

FILE LINK

DATE & TIME OF DOWNLOAD

6. A file link will appear.
7. Ensure the date & time of download is correct.

Home » Import/Export » Item » Import Items

1773 records exported

Import Items



Division

Division	General	Description	General
Company Name	LEAN TEIK SOON SDN. BHD.		
Export/Import Path	/home/ssc/general		

Details

IMPORT_ITEM.XLSX	Choose File	No file chosen
Mode	Update All (Attributes,Prices,Costs)	
Encoding	Chinese Simplified (GB2312)	

Upload Files

IMPORT_ITEM.XLSX	231,378 bytes	2015-02-27 11:37:22
----------------------------------	---------------	---------------------

8. Click on the FILE LINK to download the Item Master List.

Home » Import/Export » Item » Import Items

1773 records exported

Import Items

Division

Division: General Description: General

Company Name: LEAN TEIK SOON SDN. BHD.

Export/Import Path: /home/ssc/general

Details

IMPORT_ITEM.XLSX Choose File No file chosen

Mode: Update All (Attributes,Prices,Costs)

Encoding: Chinese Simplified (GB2312)

Download Upload Import

Upload Files

IMPORT_ITEM.XLSX 231,378 bytes 2015-02-27 11:37:22

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Powered by Inverze Sdn. Bhd.

IMPORT_ITEM.XLSX 105/226 KB, 4 secs left

9. Open the item master list in excel format.

IMPORT_ITEM - Excel

Yoke Chee Foong

1	CODE	REF_CODE	DESC	DESC2	GROUP	CATEGOR	BRAND	BARCODE	DIMENSIC	SHELF	UOM1	PPRICE1	SPRICE1	FACTOR1	BLOCKED1	UOM2	PPRICE2	SPRICE2	FACTOR2	BLOCKED2	UOM3
2	A1010258		A1 BRANDS SAUCE 2	OTHERS		OBSELETE	NUTRISOURC				UNIT	6.0417	7.5521	1		CTN	145.0008	181.251	24		
3	AAA010003		AAA LONGAN 24X56	OTHERS		OBSELETE	NUTRISOURC				UNIT	2.3086	2.8858	1		CTN	55.4064	69.258	24		
4	AAA010004A		LTS AAA LYCHEE 12X	H.BRAND		OBSELETE	AGRINOON (		12x565g		UNIT	1.75	2.98	1		CTN	21	35.7	12		
5	AAA010004AD		AAA LYCHEE [DENTE	CANNED		LTS	-				UNIT	1.7724	1	1			0	0	0		
6	AAA010005A		LTS AAA LYCHEE 24	H.BRAND		OBSELETE	AGRINOON (		24x565g		UNIT	1.5506	2.98	1		CTN	37.2144	71.52	24		
7	AAA010006		LTS AAA LYCHEE	H.BRAND		CAN FOOT	AGRINOON (		12x425g		UNIT	1.575	2.975	1		CTN	18.9	35.7	12		
8	AAA010006D		LTS AAA LYCHEE 425	CANNED		LTS	-				UNIT	0	0	1			0	0	0		
9	AAA010008A		LTS AAA LONGAN	H.BRAND		CAN FOOT	O.V. INTER		12x565g		UNIT	2.3625	4.4167	1		CTN	28.35	53	12		
10	AAA010008D		AAA LONGAN [DENT	CANNED		LTS	-				UNIT	1.8249	1.6	1			0	0	0		
11	AAA010047		AAA PICKLED LETTUC	OTHERS		OBSELETE	UNKNOWN				UNIT	1.4166	1.7708	1		CTN	33.9984	42.498	24		
12	AAA010047D		AAA PICKLED LETTUC	CANNED		LTS	-				UNIT	0	0.5	1			0	0	0		
13	AAA010048		AAA PICKLED MUSTA	OTHERS		OBSELETE	UNKNOWN				UNIT	0.9624	1.203	1		CTN	46.1952	57.744	48		
14	AAA010048D		AAA PICKLED MUSTA	CANNED		LTS	-				UNIT	0.9624	1.3	1			0	0	0		
15	AAA010049		AAA PICKLED SWEET	OTHERS		OBSELETE	UNKNOWN				UNIT	0.9624	1.203	1		CTN	46.1952	57.744	48		
16	AAA010050		AAA PICKLED LETTUC	OTHERS		OBSELETE	UNKNOWN				UNIT	2.95	3.6875	1		CTN	35.4	44.25	12		
17	AAA010051		AAA PICKLED LEEKS	OTHERS		OBSELETE	UNKNOWN				UNIT	2.2	2.75	1		CTN	26.4	33	12		
18	AAA010056		AAA SALTED PLUM 2	OTHERS		OBSELETE	CHERN YIE				UNIT	2.9167	3.6459	1		CTN	70.0008	87.501	24		
19	AAA010057		AAA SALTED PLUM	OTHERS		OBSELETE	CHERN YIE				UNIT	3	3.75	1		CTN	36	45	12		
20	AAA010062		AAA SALTED PLUM	OTHERS		OBSELETE	CHERN YIE				UNIT	0	3	1		CTN	0	72	24		

10. Edit item details in the excel file.

Update Details Of Existing Items

CODE	REF_CODE	DESC	DESC2	GROUP	CATEGORY	BRAND	BARCODE	DIMENSION	SHELF	UOM1	PPRICE1	SPRICE1	FACTOR1	BLOCKED1	UOM2	PPRICE2	SPRICE2	FACTOR2	BLOCK
TEST01ITEM		LTS CANNED - ORANGE	H.BRAND C/ CAN FOOD	O.V. INTER			12x425g			UNIT	1.8	2.6	1	CTN		21.6	31.2	12	

1. Delete all irrelevant items and keep only the items that need to be updated.
2. Update the details of item.
3. Save and close the excel file.

Import Items



Division

Division:
 Description:

Company Name:

Export/Import Path:

Details

IMPORT_ITEM.XLSX No file chosen

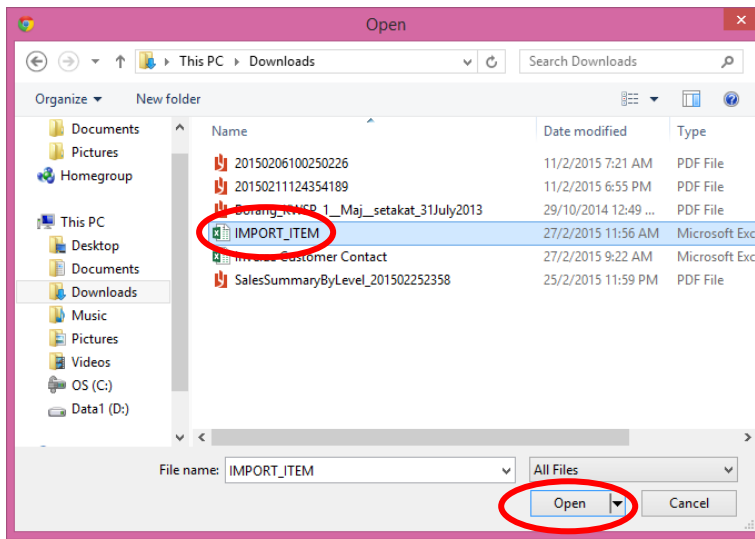
Mode:

Encoding:

Upload Files

[IMPORT_ITEM.XLSX](#)
231,378 bytes
2015-02-27 11:37:22

4. Click Choose File.



5. Browse to the Item Master List file location.
6. Select the Item Master List file.
7. Click Open.

Import Items

Division: General, Description: General, Company Name: LEAN TEIK SOON SDN. BHD., Export/Import Path: /home/ssc/general

Details: IMPORT_ITEM.XLSX, Choose File: IMPORT_ITEM.XLSX, Mode: Update All (Attributes,Prices,Costs), Encoding: Chinese Simplified (GB2312)

Buttons: Download, Upload, Import

Upload Files: IMPORT_ITEM.XLSX, 231,378 bytes, 2015-02-27 11:37:22

8. The file name will appear beside the Choose File button.

Import Items

Division: General, Description: General, Company Name: LEAN TEIK SOON SDN. BHD., Export/Import Path: /home/ssc/general

Details: IMPORT_ITEM.XLSX, Choose File: No file chosen, Mode: Update All (Attributes,Prices,Costs), Encoding: Update All (Attributes,Prices,Costs)

Buttons: Download, Upload, Import

Upload Files: IMPORT_ITEM.XLSX, 9,112 bytes, 2015-02-27 12:02:31

9. Choose the Update Mode:
 - a. Update All
 - b. Update Attributes Only – update all except UOM price, costs and UOM rate.

Import Items



Division

Division

General

Description

General

Company Name

LEAN TEIK SOON SDN. BHD.

Export/Import Path

/home/ssc/general

Details

IMPORT_ITEM.XLSX

Choose File

IMPORT_ITEM.XLSX

Mode

Update All (Attributes,Prices,Costs)

Encoding

Chinese Simplified (GB2312)

Download

Upload

Import

Upload Files

IMPORT_ITEM.XLSX

231,378 bytes

2015-02-27 11:37:22

10. Click UPLOAD.

Import Items



Division

Division

General

Description

General

Company Name

LEAN TEIK SOON SDN. BHD.

Export/Import Path

/home/ssc/general

Details

IMPORT_ITEM.XLSX

Choose File

No file chosen

Mode

Update All (Attributes,Prices,Costs)

Encoding

Chinese Simplified (GB2312)

Download

Upload

Import

Upload Files

IMPORT_ITEM.XLSX

9,112 bytes

2015-02-27 12:02:31

11. Ensure the Date & Time of upload is correct.

Import Items



Division

Division

General

Description

General

Company Name

LEAN TEIK SOON SDN. BHD.

Export/Import Path

/home/ssc/general

Details

IMPORT_ITEM.XLSX

Choose File

No file chosen

Mode

Update All (Attributes,Prices,Costs)

Encoding

Chinese Simplified (GB2312)

Download

Upload

Import

Upload Files

IMPORT_ITEM.XLSX

9,112 bytes

2015-02-27 12:02:31

12. Click IMPORT.

Home » Import/Export » Item » Import Items

✓ • ITEM [APOLLO010011]: record update

Import Items



Division

Division

Description

Company Name

Export/Import Path

Details

IMPORT_ITEM.XLSX No file chosen

Mode

Encoding

Upload Files

[IMPORT_ITEM.XLSX](#)

9,123 bytes

2015-02-27 12:13:08

13. A message in green will show the item code updated.

Update Item Status

IMPORT_ITEM (1) - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW

Clipboard Font Alignment Number

Calibri 11

General

ACTIVE

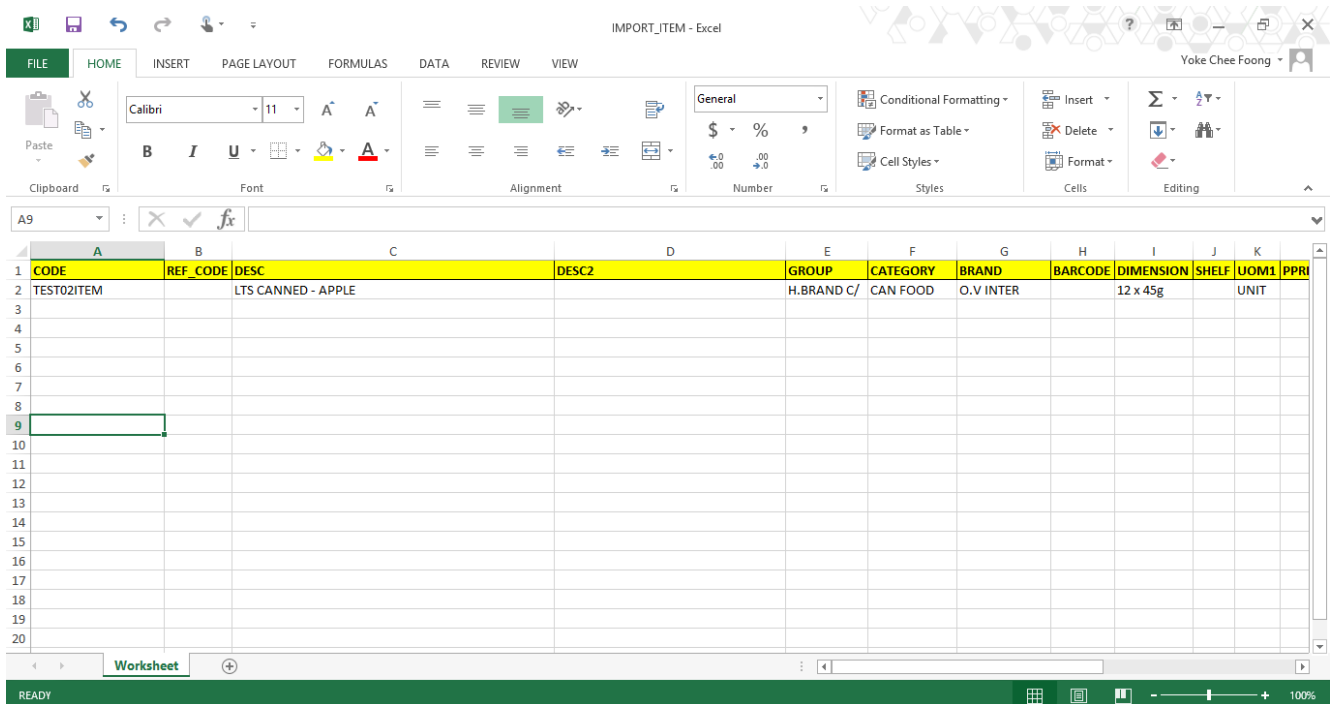
	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH
1	PPRICE3	SPRICE3	FACTOR3	BLOCKED3	UOM4	PPRICE4	SPRICE4	FACTOR4	BLOCKED4	MINORDE	REORDER	REORDER	ACTIVE
2	0	0	0	0		0	0	0		0	0	0	B
3	0	0	0	0		0	0	0		0	0	0	B
4	0	0	0	0		0	0	0		0	0	0	B
5	0	0	0	0		0	0	0		0	0	0	Y
6	0	0	0	0		0	0	0		0	0	0	B
7	0	0	0	0		0	0	0		0	114000	168000	Y
8	0	0	0	0		0	0	0		0	0	0	Y
9	0	0	0	0		0	0	0		0	12000	18000	Y
10	0	0	0	0		0	0	0		0	0	0	Y
11	0	0	0	0		0	0	0		0	0	0	B
12	0	0	0	0		0	0	0		0	0	0	Y
13	0	0	0	0		0	0	0		0	0	0	B
14	0	0	0	0		0	0	0		0	0	0	Y
15	0	0	0	0		0	0	0		0	0	0	B
16	0	0	0	0		0	0	0		0	0	0	B
17	0	0	0	0		0	0	0		0	0	0	B
18	0	0	0	0		0	0	0		0	0	0	B
19	0	0	0	0		0	0	0		0	0	0	B
20	0	0	0	0		0	0	0		0	0	0	B

Worksheet

READY

- Looks for header field called Active.
- Change the item status:
 - Y = Active
 - N = Inactive
 - B = Blocked
 - D = Deleted
- Once done, save and close the file.
- Upload the file. (Refer to section Update Details of Existing Items)

Add New Item



1. Use the Item Master List excel template.
2. Fill in the details of new item.
3. Save and close the excel file

Import Items

Division

General

Description

General

Company Name

LEAN TEIK SOON SDN. BHD.

Export/Import Path

/home/ssc/general

Details

IMPORT_ITEM.XLSX

Choose File

IMPORT_ITEM.XLSX

Mode

Update All (Attributes,Prices,Costs)

Encoding

Chinese Simplified (GB2312)

Download

Upload

Import

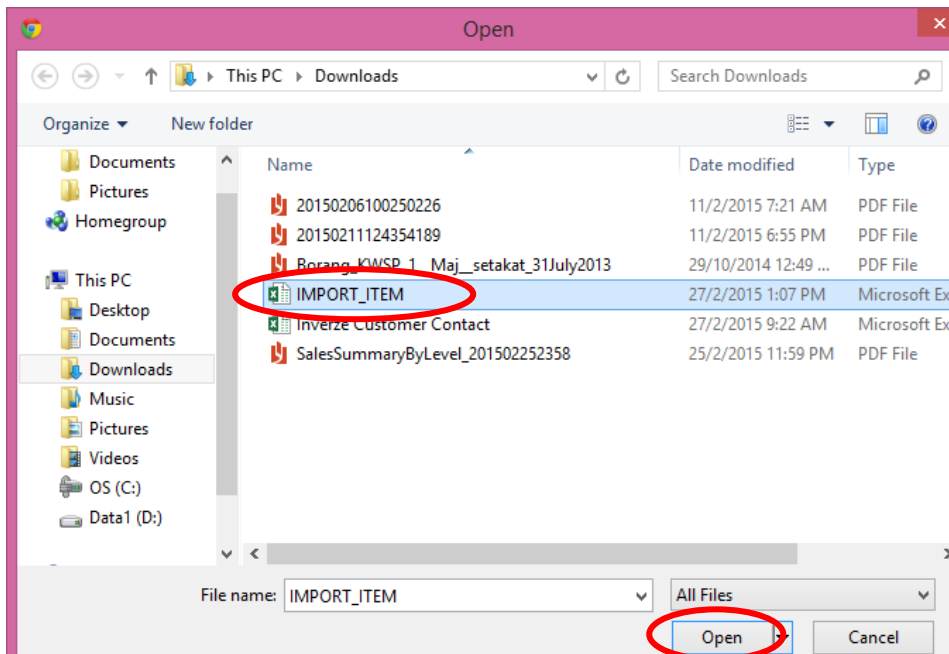
Upload Files

IMPORT_ITEM.XLSX

231,383 bytes

2015-02-27 13:01:39

4. Click Choose File.



5. Browse to the file location.
6. Select the Item master file.
7. Click Open.

Import Items

Division: General, Description: General, Company Name: LEAN TEIK SOON SDN. BHD., Export/Import Path: /home/ssc/general

Details: IMPORT_ITEM.XLSX, Choose File: IMPORT_ITEM.XLSX, Mode: Update All (Attributes,Prices,Costs), Encoding: Chinese Simplified (GB2312)

Buttons: Download, Upload, Import

Upload Files: IMPORT_ITEM.XLSX, 231,383 bytes, 2015-02-27 13:01:39

8. The file name will appear beside the Choose File button.

Import Items

Division: General, Description: General, Company Name: LEAN TEIK SOON SDN. BHD., Export/Import Path: /home/ssc/general

Details: IMPORT_ITEM.XLSX, Choose File: IMPORT_ITEM.XLSX, Mode: Update All (Attributes,Prices,Costs), Encoding: Update All (Attributes,Prices,Costs)

Buttons: Download, Upload, Import

Upload Files: IMPORT_ITEM.XLSX, 231,383 bytes, 2015-02-27 13:01:39

9. Choose the upload mode – Update All.

Import Items



Division

Division

General

Description

General

Company Name

LEAN TEIK SOON SDN. BHD.

Export/Import Path

/home/ssc/general

Details

IMPORT_ITEM.XLSX

Choose File

IMPORT_ITEM.XLSX

Mode

Update All (Attributes,Prices,Costs)

Encoding

Chinese Simplified (GB2312)

Download

Upload

Import

Upload Files

IMPORT_ITEM.XLSX

231,383 bytes

2015-02-27 13:01:39

10. Click UPLOAD.

Import Items

Division

Division

General

Description

General

Company Name

LEAN TEIK SOON SDN. BHD.

Export/Import Path

/home/ssc/general

Details

IMPORT_ITEM.XLSX

Choose File

No file chosen

Mode

Update All (Attributes,Prices,Costs)

Encoding

Chinese Simplified (GB2312)

Download

Upload

Import

Upload Files

IMPORT_ITEM.XLSX

9,115 bytes

2015-02-27 13:15:07

11. Ensure the date & time of upload is correct.

Import Items

Division

Division

General

Description

General

Company Name

LEAN TEIK SOON SDN. BHD.

Export/Import Path

/home/ssc/general

Details

IMPORT_ITEM.XLSX

Choose File

No file chosen

Mode

Update All (Attributes,Prices,Costs)

Encoding

Chinese Simplified (GB2312)

Download

Upload

Import

Upload Files

IMPORT_ITEM.XLSX

9,115 bytes

2015-02-27 13:15:07

12. Click IMPORT.

Home » Import/Export » Item » Import Items

✓ • ITEM [TEST02ITEM]: record insert

Import Items



Division

Division

Description

Company Name

Export/Import Path

Details

IMPORT_ITEM.XLSX No file chosen

Mode

Encoding

Upload Files

[IMPORT_ITEM.XLSX](#)

9,115 bytes

2015-02-27 13:15:07

13. A message in green will show the new item added.

Services

Create Services

Home | admin | Logout

Home System Import/Export Master Customers Vendors **Items** Sales & Delivery Purchasing Inventory Finance

Sales & Stock Control (SSC)

Setup
Products
Services
Materials
Standard Items
Item Costing

Shortcut

Debtor reports
Sales reports
Purchase reports
Stock reports
Sales rep reports

Sales & Delivery Purchasing Stock Control

1. Click Services.

Manage Services

Division ALL Description ALL

Export Item GST Excel | Export Item Group GST Excel | Advanced Search | **Create**

Displaying 1-9 of 9 results.

Code	Description	Group	Category	Brand	Sales Tax	Purchase Tax	Status	GL A/C Sales	GL A/C Sales Return	GL A/C Purchase	GL A/C Purchase Return	20
SVR01	PROMPT PAYMENT DISCOUNT	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	5000/200	5000/200	6030/000	6030/000	
SVR02	SCANNED SALES REBATE	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	5000/200	5000/200			
SVR03	PROMOTIONAL EXPENSES	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	5000/200	5000/200	6030/000	6030/000	
SVR04	ACHIEVEMENT INCENTIVE	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	5000/200	5000/200	6030/000	6030/000	
SVR05	OTHERS	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	5000/200	5000/200	6030/000	6030/000	
SVR06	PURCHASE REBATE	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active			6030/000	6030/000	
SVR07	LISTING FEE	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	5000/200	5000/200	6030/000	6030/000	
SVR08	DISCREPANCIES ADJUSTMENT	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	5000/200	5000/200	6030/000	6030/000	
SVR09	SALES TAX	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	-	-	6005/200	6005/200	

2. Click Create.

Create Service



General

Code * SVR10
Ref Code

Description * ROUNDING ADJUSTMENT

Type * Service
Status * Active

Group * OTHERS
Category * OBSOLETE

Brand * WIN WIN FO

Default UOM * UNIT
Default Location * G

Default Sales Tax
Default Purchase Tax

Stock Currency * RM
Stock Valuation Type Standard

Barcode

Attributes

Is Sales Item ☒
Is Purchase Item ☒

Is Service Item ☒
Is Stock Item ☐

Service Settings

Blocked in Mobile NO
Amount Adjustment NO

GL Accounts

GL A/C Sales
GL A/C Sales Return

GL A/C Cash Sales
GL A/C Purchase

GL A/C Cash Purchase
GL A/C Purchase Return

Extra Fields

Create Cancel

3. Fill in the relevant information of services.

4. Service Settings:

a. Blocked in Mobile

- Yes – Mobile SSC unable to use this service
- No – Mobile SSC able to use this service

b. Amount Adjustment

- Yes – Able to adjust amount for Discount Amount, Tax Amount, and Net Amount.
- No – normal service item, only able to key in at Order Amount.

5. Click Create.

UOM & Division Settings

Division List

Delete | Assign

Displaying 1-1 of 1 result.

Item Division	Shelf
General	

Price Settings

Image

6. Division setting – ensure the service item is assigned to relevant division.

Edit Services

Manage Services



Division

ALL

Description

ALL

[Export Item GST Excel](#) |
 [Export Item Group GST Excel](#) |
 [Advanced Search](#) |
 [Create](#)

Displaying 1-10 of 10 results.

Code	Description	Group	Category	Brand	Sales Tax	Purchase Tax	Status	GL A/C Sales	GL A/C Sales Return	GL A/C Purchase	GL A/C Purchase Return	20
SVR01	PROMPT PAYMENT DISCOUNT	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	5000/200	5000/200	6030/000	6030/000	
SVR02	SCANNED SALES REBATE	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	5000/200	5000/200			
SVR03	PROMOTIONAL EXPENSES	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	5000/200	5000/200	6030/000	6030/000	
SVR04	ACHIEVEMENT INCENTIVE	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	5000/200	5000/200	6030/000	6030/000	
SVR05	OTHERS	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	5000/200	5000/200	6030/000	6030/000	
SVR06	PURCHASE REBATE	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active			6030/000	6030/000	
SVR07	LISTING FEE	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	5000/200	5000/200	6030/000	6030/000	
SVR08	DISCREPANCIES ADJUSTMENT	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	5000/200	5000/200	6030/000	6030/000	
SVR09	SALES TAX	OTHERS	OBSOLETE	WIN WIN FO	SR	TX	Active	-	-	6005/200	6005/200	
SVR10	ROUNDING ADJUSTMENT	OTHERS	OBSOLETE	WIN WIN FO			Active					

1. Click on the pencil to edit a service details.

CUSTOMER MAINTENANCE

Create New Customer

Home » Customers » Manage

Manage Customers

Division: 600030 Description: HONG SOON AGENCY S/

Create

Displaying 1-20 of 1380 results.

Code	Company Name	Registration No	Category	Area	Address	Currency	Terms	Active
HSA/3000/062	VIE ONN SDN BHD* 维安有限公司		MM	PETALING	NO 17B-19, JLN 14/20, 46100 PETALING JAYA.	RM	30 DAYS	Y
HSA/3000/080	M MAJU GLOBAL		SPS	KEPONG	NO.45, JLN 8/40, TAMAN PUSAT KEPONG,	RM	30 DAYS	Y

1. At Menu bar, click Customers->Manage Customers.
2. Click Create to add new customer.

Create Customer

General

Code: WHM/0001 Ref Code: WHM/0001

Company Name: Testing

Registration No: Business Nature:

Is Active: ☒

Email: Logo: Choose File No file chosen

Category: Area: Term: Currency: RM Remark:

Credit Control

Credit Limit: 0.0000

Extra Fields

Channel: -

3. Enter the customer's info.

Contacts

Billing Contact **Delivery Contact**

Address *

Phone 01

Phone 02

Fax 01

Fax 02

Create **Cancel**

- Enter the billing address & delivery contact.
- Click Create.

Manage Customers

Division: 600030 Description: HONG SOON AGENCY S/

Displaying 1-20 of 1380 results.

Code	Company Name	Registration No	Category	Area	Address	Currency	Terms	Active	
HSA/3000/062	VIE QNN SDN BHD* 維安有限公司		MM	PETALING	NO 17B-19, JLN 14/20, 46100 PETALING JAYA.	RM	30 DAYS	Y	
HSA/3000/080	M MAJU GLOBAL		SPS	KEPONG	NO.45, JLN 8/40, TAMAN PUSAT KEPONG,	RM	30 DAYS	Y	
HSA/3000/081	KEDAI RUNCIT DOA IBU		SPS	RAWANG	JLN KUNDANG, KG MELAYU SRI KUNDANG,	RM	30 DAYS	Y	
HSA/3000/084	KOEY TIAM HOCK		SPS	KEPONG	NO.9, GROUND FLOOR, JLN 3/40, TMN PUSAT KEPONG,	RM	30 DAYS	Y	

- Click  to edit customer.
- To edit Customer Details - Salesman

Customer Details

Divisions **Salesman** **Branches** **Contacts**

Assign Salesman

Username	First Name	Last Name
AKIRA	AKIRA	*

Displaying 1-1 of 1 result.

- Click Assign Salesman to assign the customer to salesman.

Home | MANAGER1 | Logout

Home | System | Import/Export | Master | **Customers** | Vendors | Items | Sales & Delivery | Purchasing | Inventory | Finance

Home » Customer » Assign Users

Customer : Assign Users

Fill in search criterias to search and assign users (maximum 150 records can be displayed only).

Search

Username

9. Type in the salesman's username then click search.

Home » Customer » Assign Users

Customer : Assign Users

Fill in search criterias to search and assign users (maximum 150 records can be displayed only).

Search

Username

Total 1 result.

Username	Firstname	Lastname
☐ RONALD	RONALD	*

10. Tick the name, and click Assign.

Customer Details

Divisions | Salesman | Branches | Contacts

[Assign Salesman](#)

Username	First Name	Last Name
AKIRA	AKIRA	*

Displaying 1-1 of 1 result.

11. Click the cross if wish to remove the salesman.

Edit New Customer

Home
System
Import/Export
Customers
Items
Sales & Delivery
Purchasing
Inventory

Home » Customers » Manage

Setup
Manage Customers

Manage Customers

Division: 600030
Description: HONG SOON AGENCY S/

Create

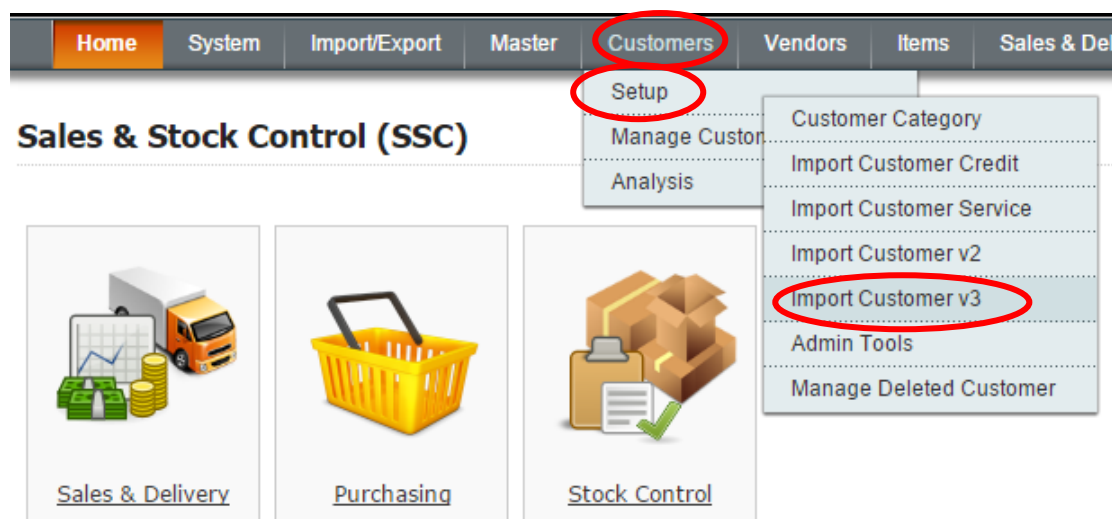
Displaying 1-20 of 1380 results.

Code	Company Name	Registration No	Category	Area	Address	Currency	Terms	Active	
HSA/3000/062	VIE ONN SDN BHD* 维安有限公司		MM	PETALING	NO 17B-19, JLN 14/20, 46100 PETALING JAYA.	RM	30 DAYS	Y	
HSA/3000/080	M MAJU GLOBAL		SPS	KEPONG	NO.45, JLN 8/40, TAMAN PUSAT KEPONG,	RM	30 DAYS	Y	

1. Click on the pencil to edit a customer details.

Import Customer (Excel Template)

Download Customer Master List



1. Go to Customers.
2. Select Setup.
3. Click Import Customer v3.

Import Customers

Division

Division: General

Description: General

Company Name: LEAN TEIK SOON SDN. BHD.

Export/Import Path: /home/ssc/general

Details

IMPORT_CUSTOMER.XLSX Choose File No file chosen

Encoding: Unicode (UTF-8)

Clear Old Relationship ☒

Download Upload Import

Upload Files

File Name	Size	Upload Date
IMPORT_CUSTOMER.XLSX	568,320 bytes	2015-02-27 08:49:48

4. Click DOWNLOAD.

Home » Import/Export » Customer » Import Customers

1046 records exported

Import Customers



Division

Division

Description

Company Name

Export/Import Path

Details

IMPORT_CUSTOMER.XLSX No file chosen

Encoding

Clear Old Relationship ☒

Download

Upload

Import

Upload Files

IMPORT_CUSTOMER.XLSX

179,727 bytes

2015-02-27 13:51:40

5. A message in red will shows the number of customers already exported.

Home » Import/Export » Customer » Import Customers

1046 records exported

Import Customers



Division

Division

Description

Company Name

Export/Import Path

Details

IMPORT_CUSTOMER.XLSX No file chosen

Encoding

Clear Old Relationship ☒

Download

Upload

Import

Upload Files

IMPORT_CUSTOMER.XLSX

179,727 bytes

2015-02-27 13:51:40

FILE LINK

DATE & TIME OF DOWNLOAD

6. A file link will appear.

7. Ensure the date & time of download is correct.

Home » Import/Export » Customer » Import Customers

1046 records exported

Import Customers



Division

Division General

Description General

Company Name LEAN TEIK SOON SDN. BHD.

Export/Import Path /home/ssc/general

Details

IMPORT_CUSTOMER.XLSX Choose File No file chosen

Encoding Unicode (UTF-8)

Clear Old Relationship ☒

Download

Upload

Import

Upload Files

[IMPORT_CUSTOMER.XLSX](#)

179,727 bytes

2015-02-27 13:51:40

8. Click the FILE LINK.

Home » Import/Export » Customer » Import Customers

1046 records exported

Import Customers

Division

Division General

Description General

Company Name LEAN TEIK SOON SDN. BHD.

Export/Import Path /home/ssc/general

Details

IMPORT_CUSTOMER.XLSX Choose File No file chosen

Encoding Unicode (UTF-8)

Clear Old Relationship ☒

Download

Upload

Import

Upload Files

[IMPORT_CUSTOMER.XLSX](#)

179,727 bytes

2015-02-27 13:51:40

Copyright © 2015 by SSC v1.0.0.
All Rights Reserved.

[IMPORT_CUSTOMER.XLSX](#)

9. Click to open the Customer Master List in excel format.

IMPORT_CUSTOMER - Excel

Yoke Chee Foong

FILEHOMEINSERTPAGE LAYOUTFORMULASDATAREVIEWVIEW

10. Edit the customer details in the excel file.

Update Details of Existing Customers

DP_CODE	CODE	REF_CODE	NAME	NAME2	ESR_CODE	CHANNEL	CATEGORY	ROW
General	3000/A07	3000/A07	AN BEE		AlexLim	GENERAL TRADE	MINI MARKET	

1. Delete all irrelevant customers and keep only the customers that need to be update.
2. Update the details of customer.
3. Save and close the excel file.

Import Customers



Division

Division

General

Description

General

Company Name

LEAN TEIK SOON SDN. BHD.

Export/Import Path

/home/ssc/general

Details

IMPORT_CUSTOMER.XLSX

Choose File

No file chosen

Encoding

Unicode (UTF-8)

Clear Old Relationship

☒

Download

Upload

Import

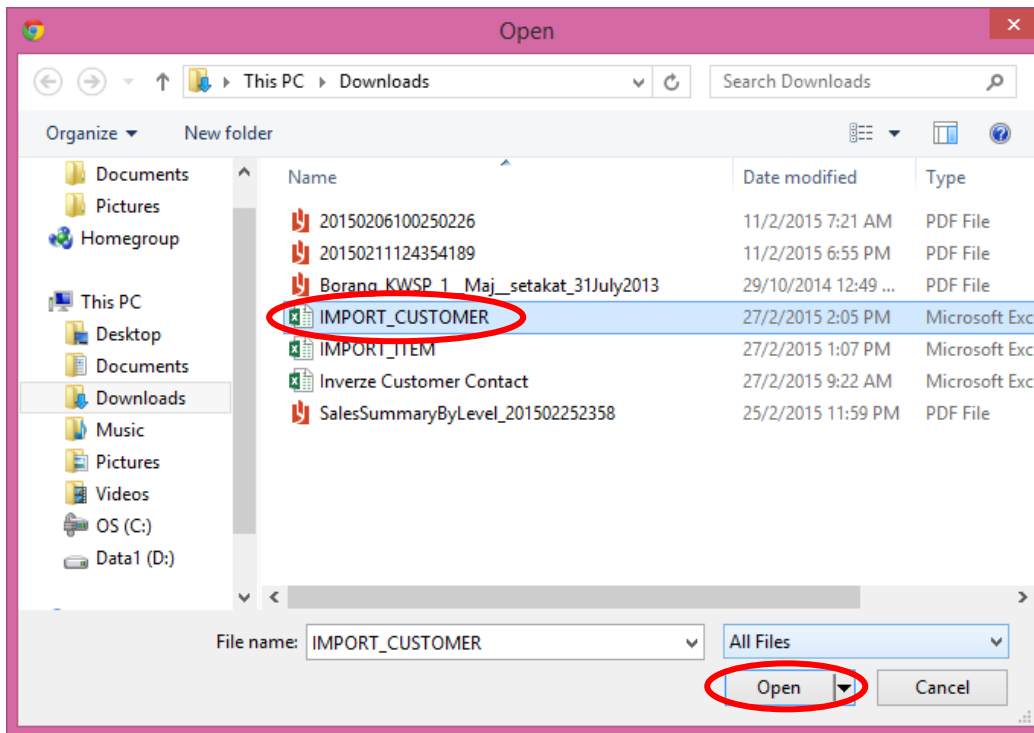
Upload Files

IMPORT_CUSTOMER.XLSX

179,727 bytes

2015-02-27 13:51:40

4. Click Choose File.



5. Browse to the file location.
6. Select the Customer Master List file.
7. Click Open.

Import Customers

Division

Division: General

Description: General

Company Name: LEAN TEIK SOON SDN. BHD.

Export/Import Path: /home/ssc/general

Details

IMPORT_CUSTOMER.XLSX Choose File **IMPORT_C...ER.XLSX**

Encoding: Unicode (UTF-8)

Clear Old Relationship ☒

Download
Upload
Import

Upload Files

IMPORT_CUSTOMER.XLSX	179,727 bytes	2015-02-27 13:51:40
--------------------------------------	---------------	---------------------

8. The file name will appear beside the Choose File button.

Import Customers



Division

Division

General

Description

General

Company Name

LEAN TEIK SOON SDN. BHD.

Export/Import Path

/home/ssc/general

Details

IMPORT_CUSTOMER.XLSX

Choose File

IMPORT_C...ER.XLSX

Encoding

Unicode (UTF-8)

Clear Old Relationship

☐

Download

Upload

Import

Upload Files

IMPORT_CUSTOMER.XLSX

179,727 bytes

2015-02-27 13:51:40

9. **UN-TICK** the box of "Clear Old Relationship".

Import Customers



Division

Division

General

Description

General

Company Name

LEAN TEIK SOON SDN. BHD.

Export/Import Path

/home/ssc/general

Details

IMPORT_CUSTOMER.XLSX

Choose File

IMPORT_C...ER.XLSX

Encoding

Unicode (UTF-8)

Clear Old Relationship

☐

Download

Upload

Import

Upload Files

IMPORT_CUSTOMER.XLSX

179,727 bytes

2015-02-27 13:51:40

10. Click Upload.

Import Customers



Division

Division

General

Description

General

Company Name

LEAN TEIK SOON SDN. BHD.

Export/Import Path

/home/ssc/general

Details

IMPORT_CUSTOMER.XLSX

Choose File

No file chosen

Encoding

Unicode (UTF-8)

Clear Old Relationship

☐

Download

Upload

Import

Upload Files

IMPORT_CUSTOMER.XLSX

9,154 bytes

2015-02-27 14:11:50

11. Ensure the date & time of download is correct.

Import Customers



Division

Division General

Description General

Company Name LEAN TEIK SOON SDN. BHD.

Export/Import Path /home/ssc/general

Details

IMPORT_CUSTOMER.XLSX Choose File No file chosen

Encoding Unicode (UTF-8)

Clear Old Relationship ☐

Download

Upload

Import

Upload Files

[IMPORT_CUSTOMER.XLSX](#)

9,154 bytes

2015-02-27 14:11:50

12. Click IMPORT.

[Home](#) » [Import/Export](#) » [Customer](#) » [Import Customers](#)

! • CUSTOMER [3000/A07]: record update

Import Customers



Division

Division General

Description General

Company Name LEAN TEIK SOON SDN. BHD.

Export/Import Path /home/ssc/general

Details

IMPORT_CUSTOMER.XLSX Choose File No file chosen

Encoding Unicode (UTF-8)

Clear Old Relationship ☐

Download

Upload

Import

Upload Files

[IMPORT_CUSTOMER.XLSX](#)

9,154 bytes

2015-02-27 14:11:50

13. A message in red will show the customer code updated.

Update Customer Status

IMPORT_CUSTOMER (1) - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW

Clipboard Font Alignment Number Styles Cells Editing

AE1 : X Y Z AA AB AC AD AE AF AG AH AI

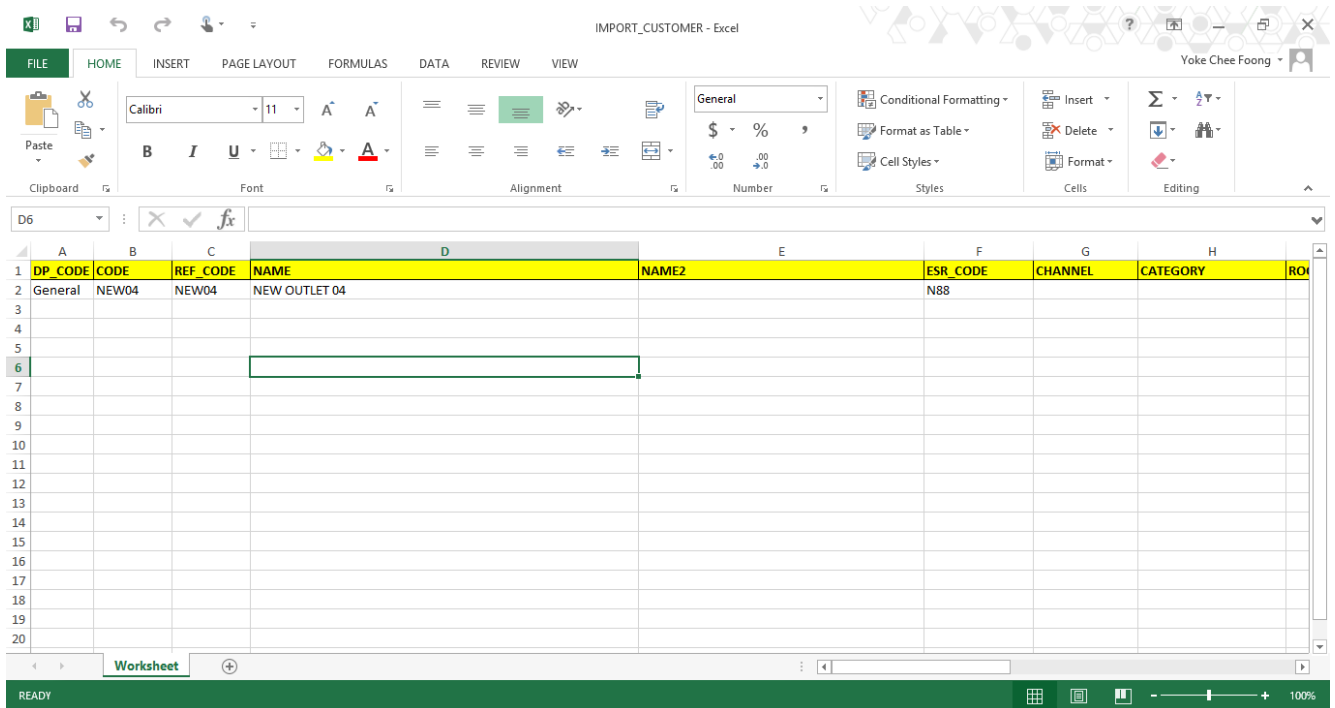
1	PHONE	PHONEA	TERM	AREA	FAX	AGENT	CURRENCY	EMAIL	WEB	TE	ACTIVE
2			30DAYS	----		AlexLim	RM				
3	012-4947145 (MAY)	012-4947145 (MAY)	30DAYS	PADANG BESAR	04-9490503	AlexLim	RM				Y
4	016-4107096	016-4154786	30DAYS	BARAT DAYA		AlexLim	RM				Y
5	04-5874101	04-5874101	30DAYS	S.P.S.	04-5874110	AlexLim	RM				Y
6	04-4847720	012-4980001	30DAYS	KULIM	04-4847720	AlexLim	RM				Y
7	604-5086806	604-5086806	30DAYS	S.P.T.	604-5025806	AlexLim	RM				Y
8	04-3313228	04-3313228	30DAYS	S.P.U	04-3235677	AlexLim	RM				Y
9	017-4215179	017-4215179	6	BARAT DAYA		AlexLim	RM				Y
10	019-5519090	019-4575999	30DAYS	ALOR SETAR	04-7713015	AlexLim	RM				Y
11	04-4857922	04-4857922	30DAYS	KULIM	04-4857922	AlexLim	RM				Y
12	04-3998576	04-3998576	30DAYS	S.P.T.		AlexLim	RM				Y
13			30DAYS	PENANG		AlexLim	RM				Y
14	04-4000922	019-4768488	30DAYS	KULIM	04-4857053	AlexLim	RM				Y
15	012-4621860	05-7218119	30DAYS	HULU PERAK	05-7216922	AlexLim	RM				Y
16	019-4575999	013-4505999	30DAYS	ALOR SETAR	04-7300164	AlexLim	RM				Y
17	05-8396119	05-8396119	30DAYS	KULIM	05-8394922	AlexLim	RM				Y
18	012-2920822	03-62746881	30DAYS	SELANGOR	03-62731669	C1	RM				Y
19	019-2786666	019-2786666	30DAYS	SELANGOR		C1	RM				Y
20	04-5882133	017-4142133	30DAYS	S.P.S.		AlexLim	RM				Y

Worksheet

READY

- Looks for header field called ACTIVE.
- Change the status:
 - Y = Active
 - N = Inactive
- Save and close the file.
- Upload the file. (Refer to section Update Details of Existing Customers)

Add New Customer



14. Fill in the new customer details in the Customer Master List excel file.
15. Save and close the file.

Import Customers

Division

Division

General

Description

General

Company Name

LEAN TEIK SOON SDN. BHD.

Export/Import Path

/home/ssc/general

Details

IMPORT_CUSTOMER.XLSX

Choose File

no file chosen

Encoding

Unicode (UTF-8)

Clear Old Relationship

☐

Download

Upload

Import

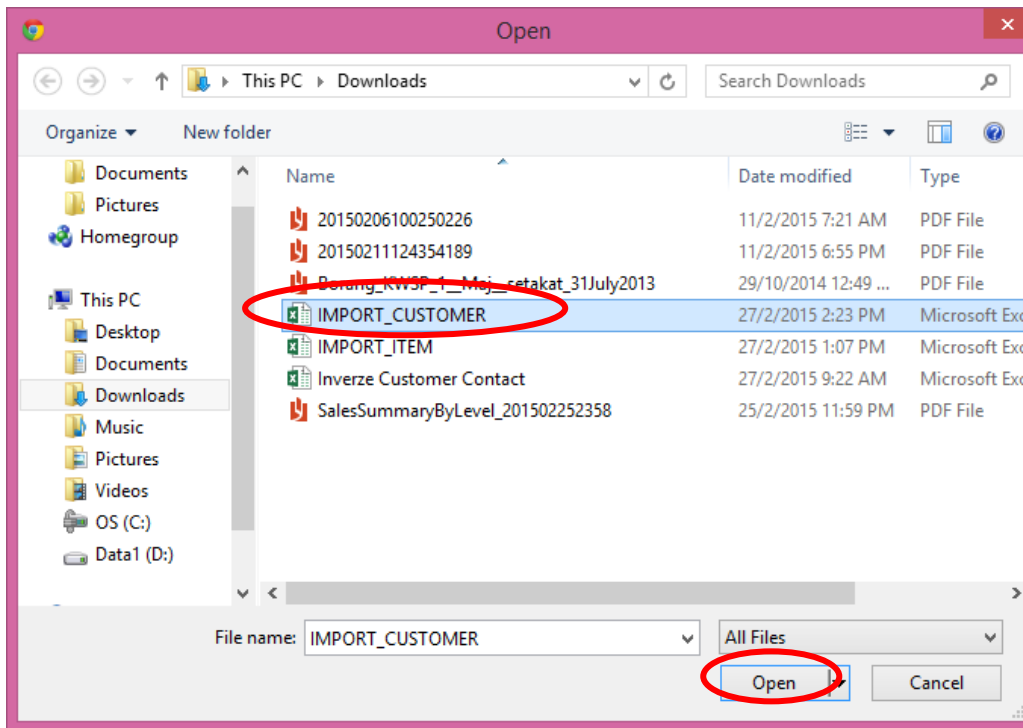
Upload Files

IMPORT_CUSTOMER.XLSX

9,028 bytes

2015-02-27 14:51:02

16. Click Choose File.



17. Browse to the file location.
18. Select the file.
19. Click Open.

Import Customers

Division

Division: General

Description: General

Company Name: LEAN TEIK SOON SDN. BHD.

Export/Import Path: /home/ssc/general

Details

IMPORT_CUSTOMER.XLSX Choose File No file chosen

Encoding: Unicode (UTF-8)

Clear Old Relationship ☐

Download Upload Import

Upload Files

IMPORT_CUSTOMER.XLSX 9,028 bytes 2015-02-27 14:51:02

20. **UN-TICK** the box of "Clear Old Relationship".

Import Customers



Division

Division:

Description:

Company Name:

Export/Import Path:

Details

IMPORT_CUSTOMER.XLSX No file chosen

Encoding:

Clear Old Relationship ☐

Upload Files

[IMPORT_CUSTOMER.XLSX](#) 9,028 bytes 2015-02-27 14:51:02

21. Click UPLOAD.

Import Customers



Division

Division:

Description:

Company Name:

Export/Import Path:

Details

IMPORT_CUSTOMER.XLSX No file chosen

Encoding:

Clear Old Relationship ☐

Upload Files

[IMPORT_CUSTOMER.XLSX](#) 9,028 bytes 2015-02-27 14:51:02

22. Ensure the date & time of upload is correct.

Import Customers



Division

Division:

Description:

Company Name:

Export/Import Path:

Details

IMPORT_CUSTOMER.XLSX No file chosen

Encoding:

Clear Old Relationship ☐

Upload Files

[IMPORT_CUSTOMER.XLSX](#) 9,028 bytes 2015-02-27 14:51:02

23. Click Import.

Home » Import/Export » Customer » Import Customers

• CUSTOMER [NEW04]: record insert

Import Customers



Division

Division	General
Description	General
Company Name	LEAN TEIK SOON SDN. BHD.
Export/Import Path	/home/ssc/general

Details

IMPORT_CUSTOMER.XLSX	Choose File	No file chosen
Encoding	Unicode (UTF-8)	
Clear Old Relationship	☐	

Download Upload Import

Upload Files

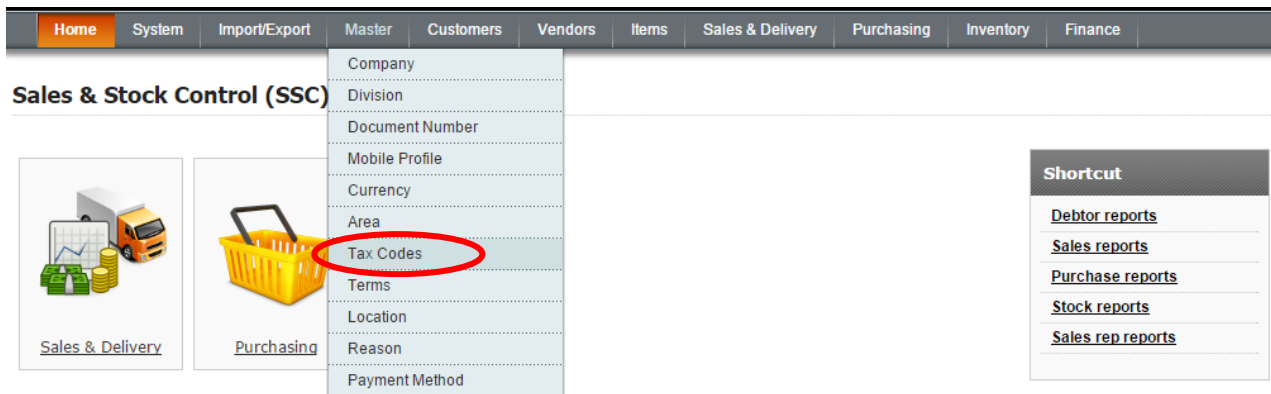
IMPORT_CUSTOMER.XLSX	9,024 bytes	2015-02-27 14:36:54
----------------------	-------------	---------------------

24. A message in red will show the new customer already added.

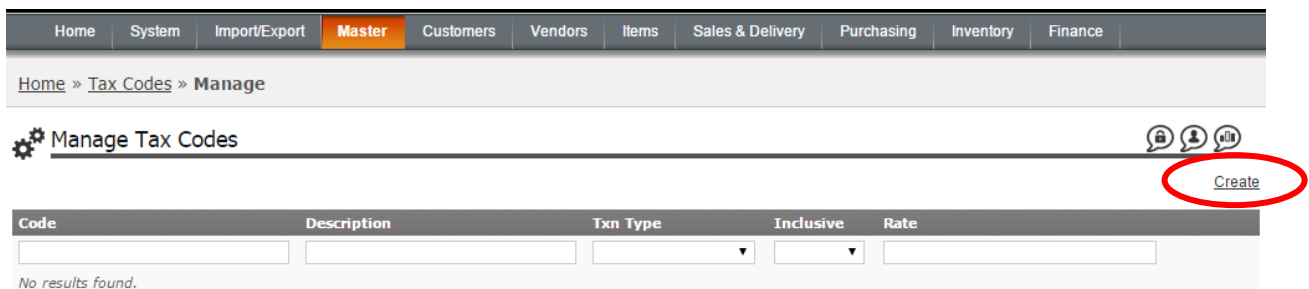
GST MAINTENANCE

GST Tax Codes

➤ Create GST Tax Code



1. Go to Master.
2. Click Tax Codes.



3. Click CREATE.

Create Tax Code



Fields with * are required.

General

Code *
 Description
 Txn Type * SALES
 Inclusive ☐
 Rate * 0.0000 %

Create

Cancel

4. Fill in the Code, Description, and select Transaction Type.
5. Tick inclusive if the GST calculation is inclusive.
6. Un-tick inclusive if GST calculation is exclusive.
7. Then, Click CREATE.

Code * SR
 Description STANDARD-RATED SUPPLIES
 Txn Type * SALES
 Inclusive ☐
 Rate * 0.0000 %

Home » Tax Codes » SR » Update

✓ Data saved...

Update Tax Code SR



Fields with * are required.

General

Code * SR
 Description STANDARD-RATED SUPPLIES
 Txn Type * SALES
 Inclusive ☐
 Rate * 0.0000 %

Save

Close

Tax Code Details

[Delete](#) | [Create](#)

#	Code	Description	G/L Account Tax	Non Taxable	Rate
---	------	-------------	-----------------	-------------	------

No results found.

8. A message in green will show the tax code is created.

Home » Tax Codes » SR » Update

✓ Data saved...

Update Tax Code SR



Fields with * are required.

General

Code * SR
Description STANDARD-RATED SUPPLIES
Txn Type * SALES
Inclusive ☐
Rate * 0.0000 %

Save

Close

Tax Code Details

Delete | Create

#	Code	Description	G/L Account Tax	Non Taxable	Rate
No results found.					

9. At section – Tax Code Details, click CREATE.

Create Tax : SR

Fields with * are required.

General

1
Code *
Description
G/L Account Tax
Non Taxable ☐
Rate * 0.0000 %

Create

Cancel

10. Fill in Code, Description, & Tax Rate.

11. Then, click Create.

1

Code * SR

Description STANDARD-RATED SUPPLIES

G/L Account Tax

Non Taxable ☐

Rate * 6.0000 %

Home » Tax Codes » SR » Update

✓ Data saved...

Update Tax Code SR

Fields with * are required.

General

Code * SR
Description STANDARD-RATED SUPPLIES
Txn Type * SALES
Inclusive ☐
Rate * 6.0000 %

Save

Close

Tax Code Details

[Delete](#) | [Create](#)

Displaying 1-1 of 1 result.

#	Code	Description	G/L Account Tax	Non Taxable	Rate
1	SR	STANDARD-RATED SUPPLIES		N	6.0000%

12. A message in green will show the tax code details already created.

13. Click CLOSE.

Manage Tax Codes

[Create](#)

Displaying 1-1 of 1 result.

Code	Description	Txn Type	Inclusive	Rate
SR	STANDARD-RATED SUPPLIES	SALES	N	6.00%

14. Preview of the tax code created.

➤ View Tax Code

⚙️ Manage Tax Codes



[Create](#)

Displaying 1-23 of 23 results

Code	Description	Txn Type	Inclusive	Rate	
SR	STANDARD-RATED SUPPLIES	SALES	N	6.00%	  
ZLR	LOCAL ZERO RATED SUPPLIES	SALES	N	0.00%	  

1. To view tax code, click



⚙️ View Tax Code ZRE



Fields with * are required.

General

Code * ZRE
Description EXPORTATION ZERO RATED SUPPLIES
Txn Type * SALES
Inclusive ☐
Rate * 0.0000 %

Update

Close

Tax Code Details

Displaying 1-1 of 1 result.

#	Code	Description	G/L Account Tax	Non Taxable	Rate
1	ZRE	EXPORTATION ZERO RATED SUPPLIES	4800/001	N	0.0000%

2. Details of the tax code.
3. Once done, click CLOSE.

➤ Edit Tax Code

⚙️ Manage Tax Codes



[Create](#)

Displaying 1-23 of 23 results

Code	Description	Txn Type	Inclusive	Rate	
SR	STANDARD-RATED SUPPLIES	SALES	N	6.00%	
ZLR	LOCAL ZERO RATED SUPPLIES	SALES	N	0.00%	

1. To edit the tax code, click



⚙️ Update Tax Code SR



Fields with * are required.

General

Code *

Description

Txn Type *

Inclusive ☐

Rate *

Save

Close

Tax Code Details

[Delete](#) | [Create](#)

Displaying 1-1 of 1 result

#	Code	Description	G/L Account Tax	Non Taxable	Rate	
1	SR	STANDARD-RATED SUPPLIES		N	6.0000%	

2. Click



to edit the tax code details.

[Home](#) » [Tax Group](#) » [SR](#) » [Update Tax](#)

Update Tax : SR

Fields with * are required.

General

#

Code *

Description

G/L Account Tax

Non Taxable ☐

Rate *

Save

Close

3. Edit the details, then click SAVE.

Home » Tax Codes » SR » Update

✓ Data updated...

Update Tax Code SR

Fields with * are required.

General

Code * SR
Description STANDARD-RATED SUPPLIES
Txn Type * SALES
Inclusive ☐
Rate * 6.0000 %

Save

Close

Tax Code Details

[Delete](#) | [Create](#)

Displaying 1-1 of 1 result.

#	Code	Description	G/L Account Tax	Non Taxable	Rate	
1	SR	STANDARD-RATED SUPPLIES		N	6.0000%	

- A message in green will show the update saved.
- Once done, click CLOSE.

➤ Delete Tax Code

Manage Tax Codes

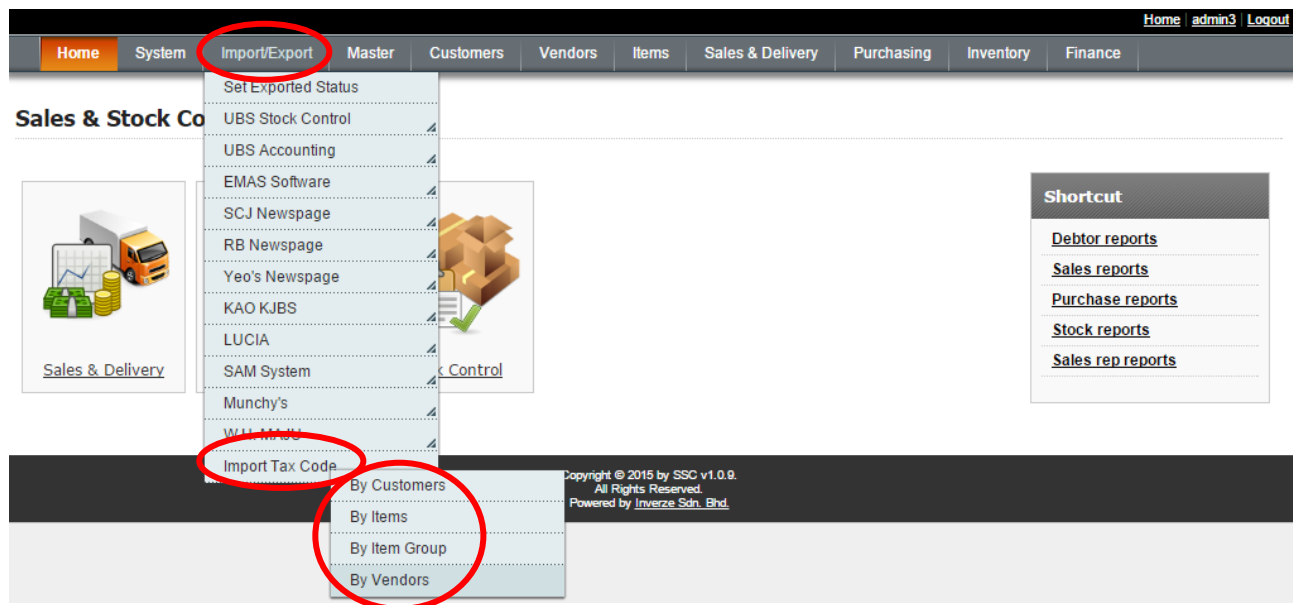
[Create](#)

Displaying 1-23 of 23 results

Code	Description	Txn Type	Inclusive	Rate	
SR	STANDARD-RATED SUPPLIES	SALES	N	6.00%	
ZLR	LOCAL ZERO RATED SUPPLIES	SALES	N	0.00%	

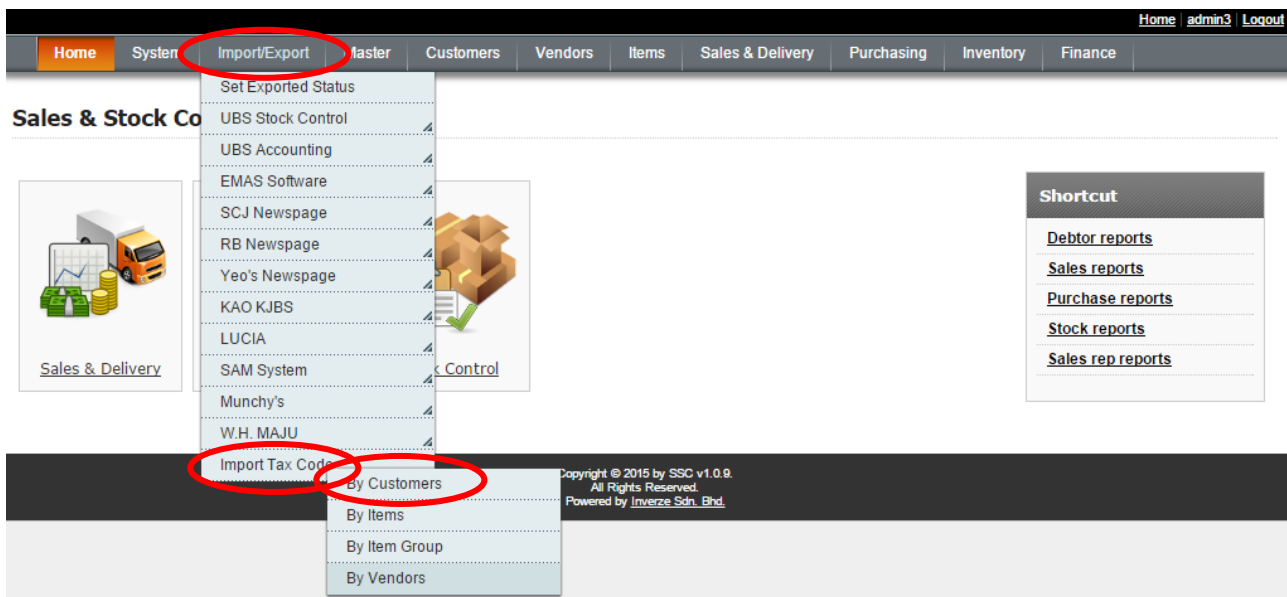
- To delete tax codes, click

Import GST Tax Code & GST Registration Number



1. Go to Import/Export.
2. Select Import Tax Code.
3. Click the following types:
 - a) By Customer – to update GST Tax Code & GST Registration Number
 - b) By Items
 - c) By Item Group
 - d) By Vendors – to update GST Tax Code & GST Registration Number

a) Import GST Tax Code by Customer



1. Import Tax Code by customers normally use by the following conditions:
 - a. Customer in Designated Area (Langkawi, Labuan, Tioman) which subject to Zero-rated tax.
 - b. Customer exempted by Malaysian Government.
2. Go to Import/Export.
3. Select Import Tax Code.
4. Click By Customers.

Home » Import/Export » Import Tax Code By Customers

Import Tax Code By Customers

Division: BS (selected)
 Company Name: BS (selected)
 Export/Import Path: GENERAL (selected)

Description: BEANSENG

Details
 CUSTOMER_TAX_CODE.CSV: Choose File No file chosen
 Encoding: Unicode (UTF-8)

Download Upload Import

5. Select the correct division.

Import Tax Code By Customers



Division

Division: Description:

Company Name:

Export/Import Path:

Details

CUSTOMER_TAX_CODE.CSV: No file chosen

Encoding:

6. Click Download.

Home » Import/Export » Import Tax Code By Customers

1552 records e exported

Import Tax Code By Customers



Division

Division: Description:

Company Name:

Export/Import Path:

Details

CUSTOMER_TAX_CODE.CSV: No file chosen

Encoding:

7. A message in red will show number of records exported.

1552 records e exported

Import Tax Code By Customers



Division

Division: Description:

Company Name:

Export/Import Path:

Details

CUSTOMER_TAX_CODE.CSV: No file chosen

Encoding:

Upload Files

CUSTOMERS_TAX_CODE.CSV

205,175 bytes

2015-03-09 15:59:05

File Link

Download Date & Time

8. Ensure the Download date & time is correct.

Home » Import/Export » Import Tax Code By Customers

1552 records e exported

Import Tax Code By Customers



Division

Division: Description:

Company Name:

Export/Import Path:

Details

CUSTOMER_TAX_CODE.CSV No file chosen

Encoding:

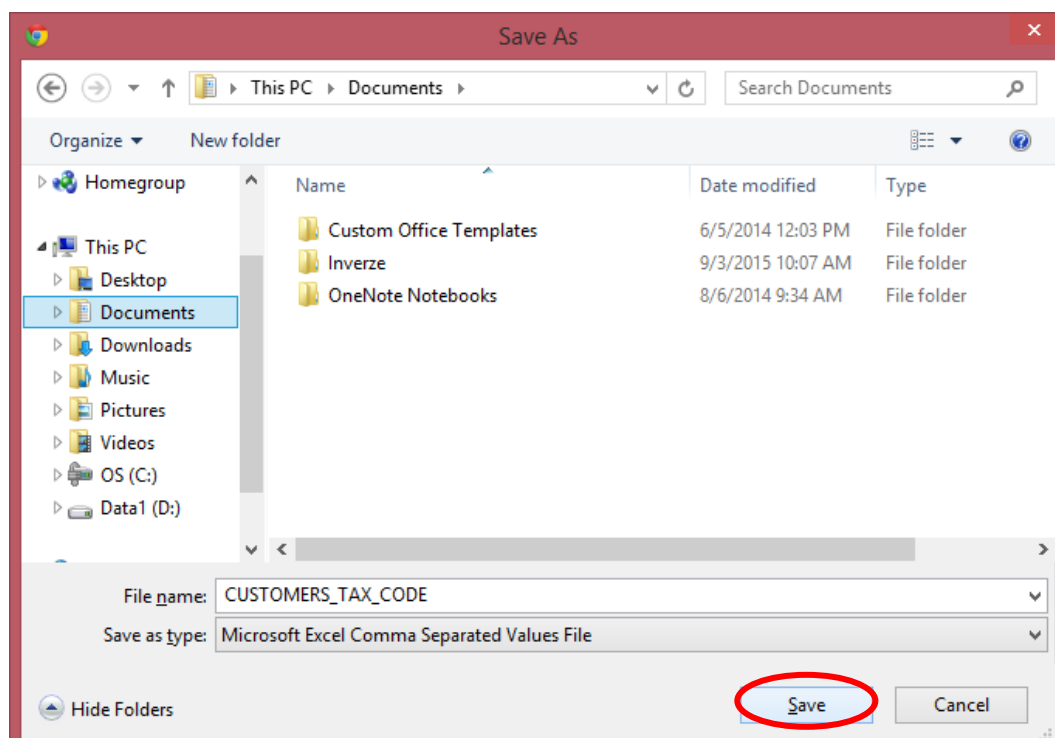
Upload Files

CUSTOMERS_TAX_CODE.CSV 205,175 bytes 2015-03-09 15:59:05

- Open link in new tab
- Open link in new window
- Open link in incognito window
- Save link as...**
- Copy link address
- Inspect element

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9. Right click the file link and click "Save Link As....".



10. Save the file.

Import Tax Code By Customers

Division: **GENERAL** Description: **GENERAL AGENCY**

Company Name: **XYZ SDN. BHD.**

Export/Import Path: **/var/www/gen**

Details:

CUSTOMER_TAX_CODE.CSV: **Choose File** No file chosen

Encoding: **Unicode (UTF-8)**

Download Upload Import

Upload Files:

CUSTOMERS_TAX_CODE.CSV 205,175 bytes 2015-03-09 15:59:05

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CUSTOMERS_TAX_CODE.CSV

11. A file will be downloaded, click the file to open.

CUSTOMERS_TAX_CODE - Excel

CUSTOMER CODE	NAME	ADDRESS	CATEGORY	CATEGORY DESC	STATUS	GST REG NO	GST SALES TAX	GST PURCHASE TAX
3000/BKG	XYZ TRD SDN BHD	-	-	-	ACTIVE			
300C/004	CASH	-	-	-	ACTIVE			
300T/003	TF VALUE MART SDN BHD-JERANTUT	LOT 55-57, BANDAR INDEPURA, JALAN ZAPIN	SDS	SDS	ACTIVE			
300T/018	TF VALUE MART SDN BHD-TEMERLOH	TF VALUE MART SDN BHD-TEMERLOH LOT 1F-	-	-	ACTIVE			
30HM/003	HORNG THAI	NO 1234 MELAKA	CKK088	CASH SALES	ACTIVE			
30RW/001	VILLAGE GROCER(BANGSAR)SDN.BHD	G1,GROUND FLOOR BANGSAR VILLAGE NO 1,J	HYP	HYP	ACTIVE			
30RW/002	I ONE U MINI MARKET	NO 5,TAMAN LOKE YEW, 35900 TG.MALIM, PE	-	-	ACTIVE			
30RW/003	P.RAMACHANDRAN PATCHAMUTHU	469,JLN NAKHODA KIRI 1 KAMPUNG NAKHOD	-	-	ACTIVE			
30RW/004	CK JUARA MARKETING	NO,97 JLN SBC 1, TMN SRI BT CAVES, S.D.E	-	-	ACTIVE			
30RW/006	K.B KADER STORE	NO,40 JLN SULTAN, 50000 KUALA LUMPUR	-	-	ACTIVE			
30RW/007	PASAR MINI ALAM JHAYA	LOT PT 3069-C JALAN SUNGAI BULOH KG PAYZ	MMK	MMK	ACTIVE			
30RW/008	THE STORE(M)SDN.BHD(SHAH ALAM)	TS -SHAH ALAM (PLAZA ALAM SENTAL) PLAZA	SPM	SPM	ACTIVE			
30RW/009	THE STORE(M)SDN.BHD(SRI PETALING)	TS-KUALA LUMPUR(SRI PETALING) LOT 24211,	SPM	SPM	ACTIVE			
30RW/010	SELF-SERVICE WHOLESAL(S)SDN.	WISMA SSW NO 1(PT598) JALAN PENGKALAN	WHS	WHS	ACTIVE			
30RW/011	CHECKERS HYPERMARKET SDN.BHD.	CHECKERS HYPERMARKET JALAN KLANG LAM	HYP	HYP	ACTIVE			
30RW/012	NSK TRADE CITY SDN.BHD.-SELAYANG	WISMA YAP TIEH(TAG) LOT 4673,4674&4675,	-	-	ACTIVE			
30RW/013	MY NEWS.COM (372)	GREAT MALAYSIA NEW SDN.BHD(852551-K) S-	-	-	ACTIVE			
30RW/014	PASARAYA OKAY SDN.BHD.	NO 1A,LOT 4887, BATU 7 3/4, JLN IPOH,SELAN	-	-	ACTIVE			
30RW/015	GELUGA SIMFONI ENTERPRISE	KEDAI SERBANEKA MAHALAH ASMA UNIVERS	-	-	ACTIVE			

12. Fill in the GST Registration No., GST Sales Tax Group & GST Purchase Tax Group for each customer.

Import Tax Code By Customers

Division: **GENERAL** Description: **GENERAL AGENCY**

Company Name: **XYZ SDN. BHD.**

Export/Import Path: **/var/www/gen**

Details:

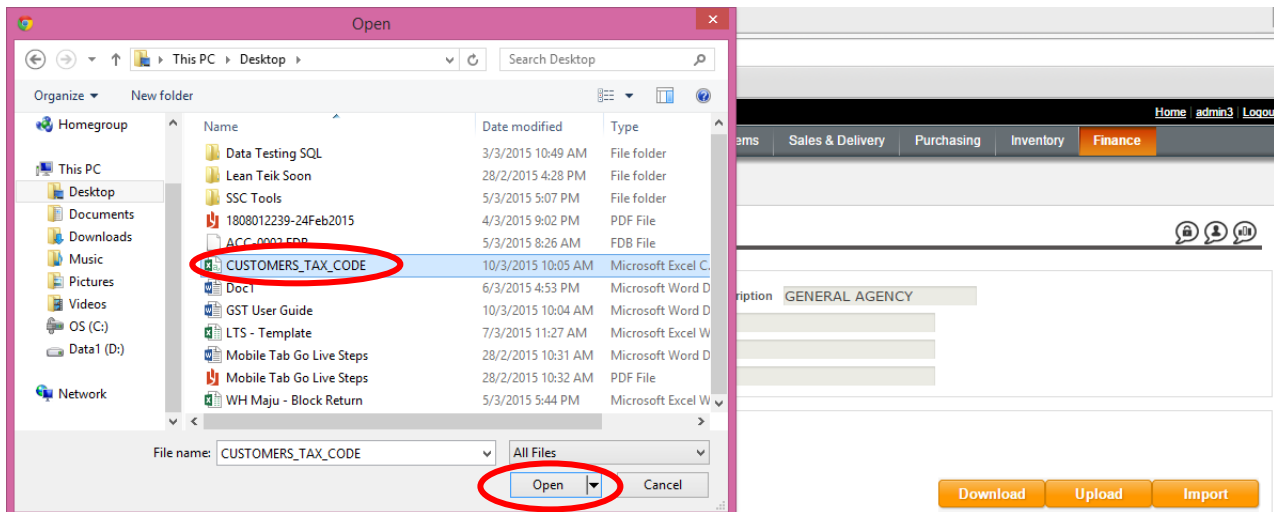
CUSTOMER_TAX_CODE.CSV: **Choose File** No file chosen

Encoding: **Unicode (UTF-8)**

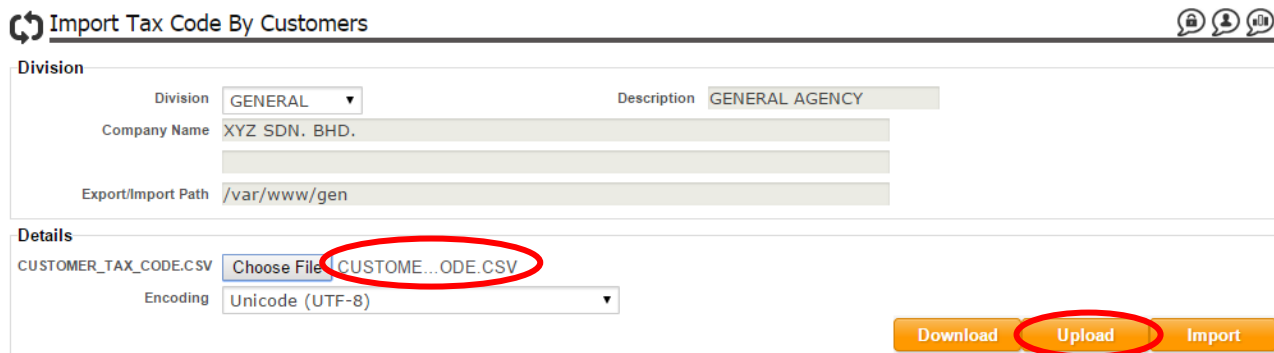
Download Upload Import

13. Ensure the division is correct.

14. Click Choose File.



15. Browse for the file. Click OPEN.



16. The file name will appear beside the Choose File button.

17. Click UPLOAD.

Import Tax Code By Customers



Division

GENERAL

Description
GENERAL AGENCY

Company Name
XYZ SDN. BHD.

Export/Import Path
/var/www/gen

Details

CUSTOMER_TAX_CODE.CSV
Choose File
No file chosen

Encoding
Unicode (UTF-8)

Download
Upload
Import

Upload Files

CUSTOMERS_TAX_CODE.CSV
183,178 bytes
2015-03-10 10:11:20

18. Ensure the date and time is correct.

Import Tax Code By Customers



Division

GENERAL

Description
GENERAL AGENCY

Company Name
XYZ SDN. BHD.

Export/Import Path
/var/www/gen

Details

CUSTOMER_TAX_CODE.CSV
Choose File
No file chosen

Encoding
Unicode (UTF-8)

Download
Upload
Import

Upload Files

CUSTOMERS_TAX_CODE.CSV
183,178 bytes
2015-03-10 10:11:20

19. Click IMPORT.

Home » Import/Export » Import Tax Code By Customers

1552 records updated

Import Tax Code By Customers



Division

GENERAL

Description
GENERAL AGENCY

Company Name
XYZ SDN. BHD.

Export/Import Path
/var/www/gen

Details

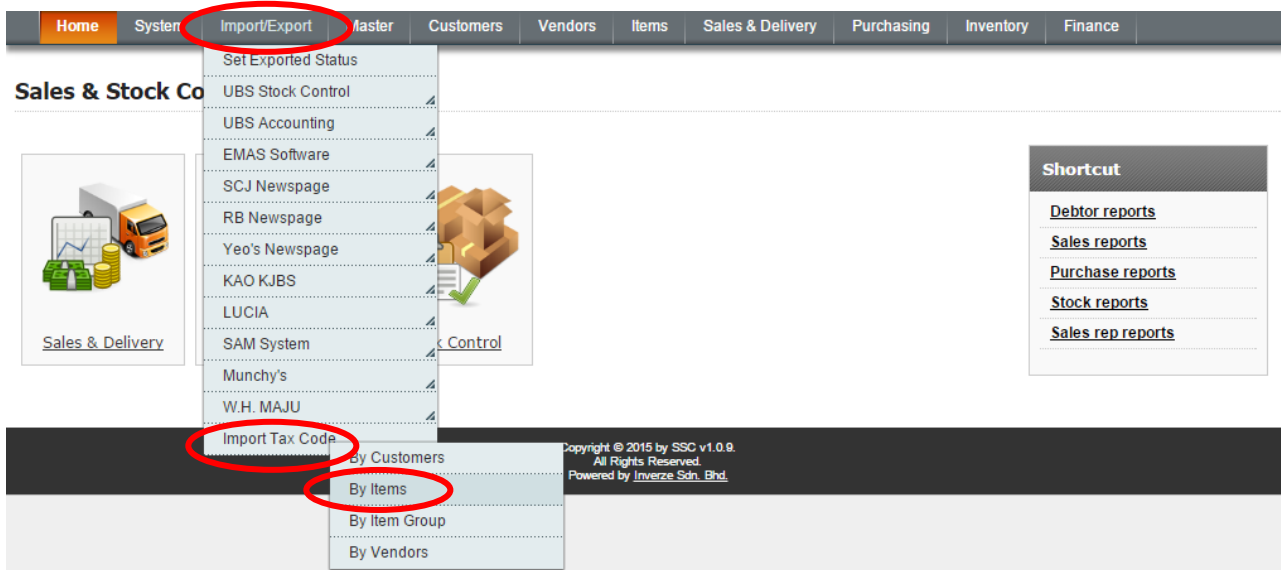
CUSTOMER_TAX_CODE.CSV
Choose File
No file chosen

Encoding
Unicode (UTF-8)

Download
Upload
Import

20. A message in red will show the number of records updated.

b) Import GST Tax Code by Items



1. Go to Import/Export.
2. Select Import Tax Code.
3. Click By Items.

Import Tax Code By Item

Division: BS Description: BEANSENG

Company Name: BS

Export/Import Path: GENERAL

Details

ITEM_TAX_CODE.CSV Choose File No file chosen

Encoding: Unicode (UTF-8)

Download Upload Import

4. Select the correct Division.

Import Tax Code By Item



Division

Division

GENERAL

Description

GENERAL AGENCY

Company Name

XYZ SDN. BHD.

Export/Import Path

/var/www/gen

Details

ITEM_TAX_CODE.CSV

Choose File

No file chosen

Encoding

Unicode (UTF-8)

Download

Upload

Import

5. Click DOWNLOAD.

2251 records e exported

Import Tax Code By Item

Division

Division

GENERAL

Description

GENERAL AGENCY

Company Name

XYZ SDN. BHD.

Export/Import Path

/var/www/gen

Details

ITEM_TAX_CODE.CSV

Choose File

No file chosen

Encoding

Unicode (UTF-8)

Download

Upload

Import

Upload Files

ITEM_TAX_CODE.CSV

142,196 bytes

2015-03-10 10:34:50

6. A message in red will show the number of items downloaded.

7. Ensure the date & time downloaded.

Import Tax Code By Item

Division

Division

GENERAL

Description

GENERAL AGENCY

Company Name

XYZ SDN. BHD.

Export/Import Path

/var/www/gen

Details

ITEM_TAX_CODE.CSV

Choose File

No file chosen

Encoding

Unicode (UTF-8)

Download

Upload

Import

Upload Files

ITEM_TAX_CODE.CSV

142,196 bytes

2015-03-10 10:34:50

Open link in new tab

Open link in new window

Open link in incognito window

Save link as...

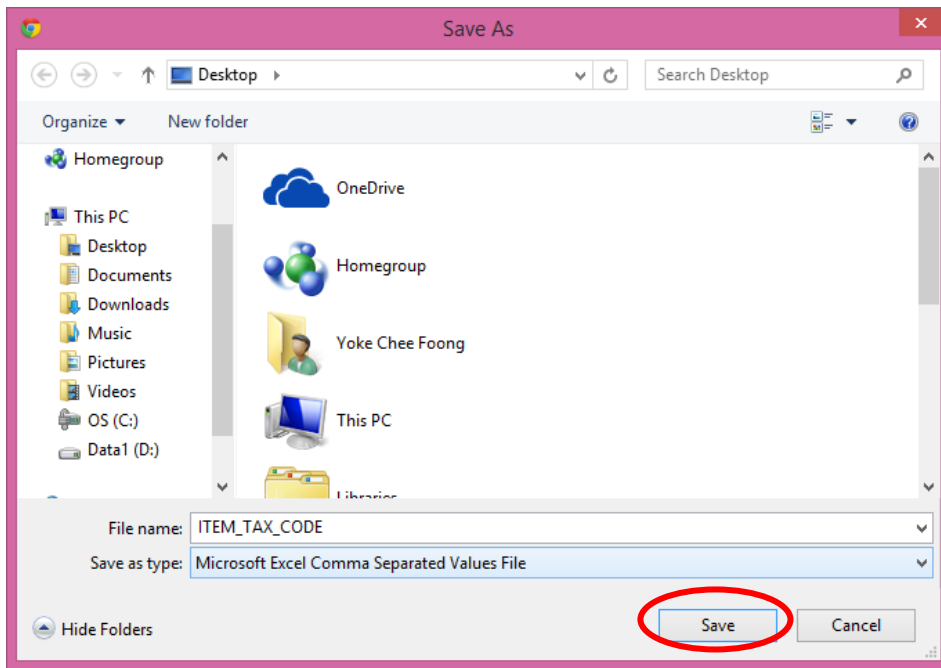
Copy link address

Copyright © 2015 by SSC v1.0.0.

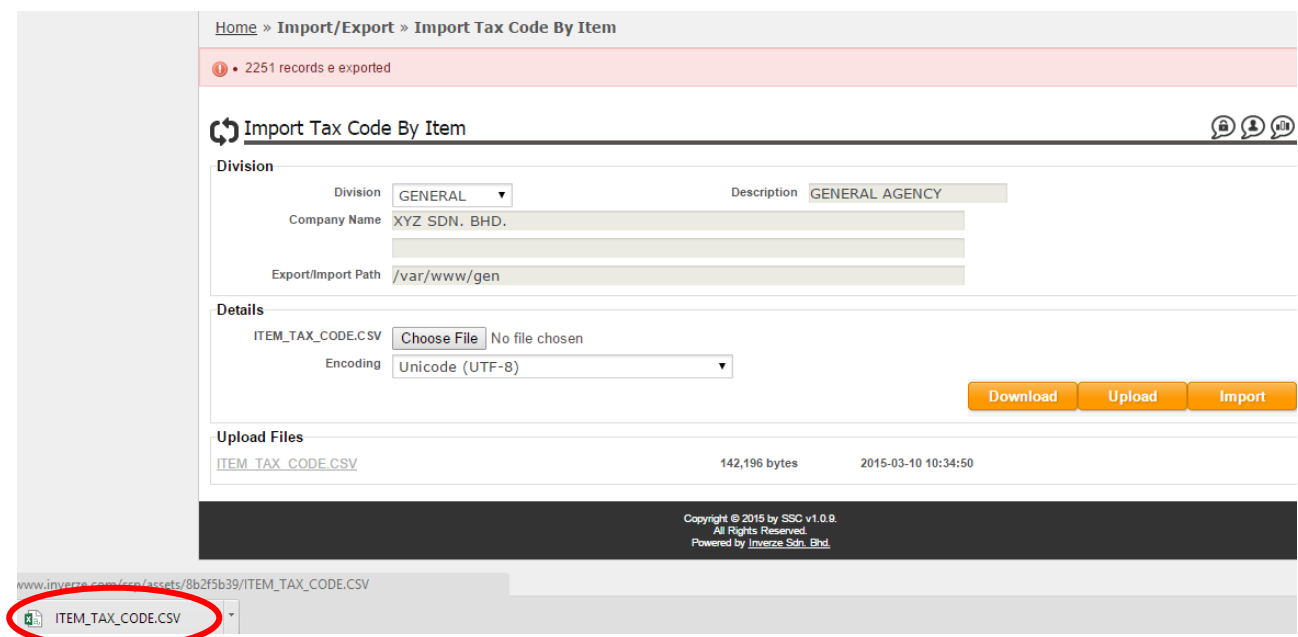
All Rights Reserved.

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8. Right click on the File Link, click "Save Link As..."



9. Click SAVE.



10. Click on the file to open.

ITEM_TAX_CODE - Excel

ITEM_CODE	DESCRIPTION	GROUP	CATEGORY	BRAND	STATUS	TYPE	GST SALES TAX	GST PURCHASE TAX
01NN	YEEPI BC 5HC G/LIGHTER 50'S	F	GM	-	a	p		
01NN01	YEEPI JOM 5TC G/LIGHTER 50'S	F	GM	-	a	p		
101403	PAS MILK-FRESH 1L	W	DL	-	i	p		
101404	PAS MILK-FULL CREAM 1L	W	DL	DL	i	p		
101406	PAS MILK-CHOC 1L	W	DL	DL	i	p		
101407	PAS MILK-CHOC 250ML	W	DL	DL	i	p		
101408	PAS MILK-LOW FAT 1L	W	DL	DL	i	p		
101410	PAS MILK-STRAW 1L	W	DL	-	i	p		
101411	PAS MILK-STRAW 250ML	W	DL	-	i	p		
101620	YOG LFAT-NATURAL 140G	W	DL	-	i	p		
101621	YOG LFAT-STRAW 140G	W	DL	-	i	p		
101622	YOG LFAT-MANGO 140G	W	DL	-	i	p		
101624	YOG LFAT-BLUEBERRY 140G	W	DL	-	i	p		
101625	YOG LFAT-M.BERRY 140G	W	DL	-	i	p		
101626	YOG LFAT-M.FRUIT 140G	W	DL	-	i	p		
101627	YOG LFAT-NATURAL 500G	W	DL	-	i	p		
101676	YOG LFAT-PAPAYA 140G	W	DL	-	i	p		
101784	YOG LFAT-D.APPLE 140G	W	DL	-	i	p		
101786	YOG SHINE-ORANGEMNG 135G	W	DL	-	i	p		

11. Fill in the GST Sales Tax and Purchase Tax for each item.

2251 records e exported

Import Tax Code By Item

Division: **GENERAL** Description: GENERAL AGENCY

Company Name: XYZ SDN. BHD.

Export/Import Path: /var/www/gen

Details

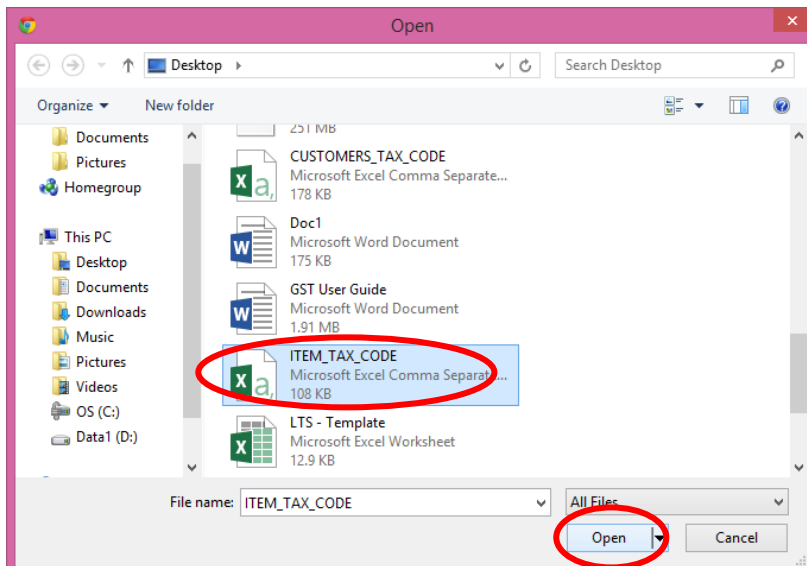
ITEM_TAX_CODE.CSV: **Choose File** No file chosen

Encoding: Unicode (UTF-8)

Download Upload Import

12. Ensure the division is correct.

13. Click Choose File.



14. Browse for the file. Click OPEN.

Import Tax Code By Item

Division: GENERAL, Description: GENERAL AGENCY, Company Name: XYZ SDN. BHD., Export/Import Path: /var/www/gen

Details: ITEM_TAX_CODE.CSV, Choose File: ITEM_TAX_CODE.CSV, Encoding: Unicode (UTF-8)

Buttons: Download, Upload, Import

15. The file name will appear beside the Choose File button.

16. Click UPLOAD.

Import Tax Code By Item

Division: GENERAL, Description: GENERAL AGENCY, Company Name: XYZ SDN. BHD., Export/Import Path: /var/www/gen

Details: ITEM_TAX_CODE.CSV, Choose File: No file chosen, Encoding: Unicode (UTF-8)

Buttons: Download, Upload, Import

Upload Files: ITEM_TAX_CODE.CSV, 110,685 bytes, 2015-03-10 11:12:45

17. Ensure the date and time is correct.

Import Tax Code By Item



Division

Division

GENERAL ▼

Description

GENERAL AGENCY

Company Name

XYZ SDN. BHD.

Export/Import Path

/var/www/gen

Details

ITEM_TAX_CODE.CSV

Choose File

No file chosen

Encoding

Unicode (UTF-8) ▼

Download

Upload

Import

Upload Files

ITEM_TAX_CODE.CSV

110,685 bytes

2015-03-10 11:12:45

18. Click IMPORT.

Home » Import/Export » Import Tax Code By Item

2251 records updated

Import Tax Code By Item

Division

Division

GENERAL ▼

Description

GENERAL AGENCY

Company Name

XYZ SDN. BHD.

Export/Import Path

/var/www/gen

Details

ITEM_TAX_CODE.CSV

Choose File

No file chosen

Encoding

Unicode (UTF-8) ▼

Download

Upload

Import

Upload Files

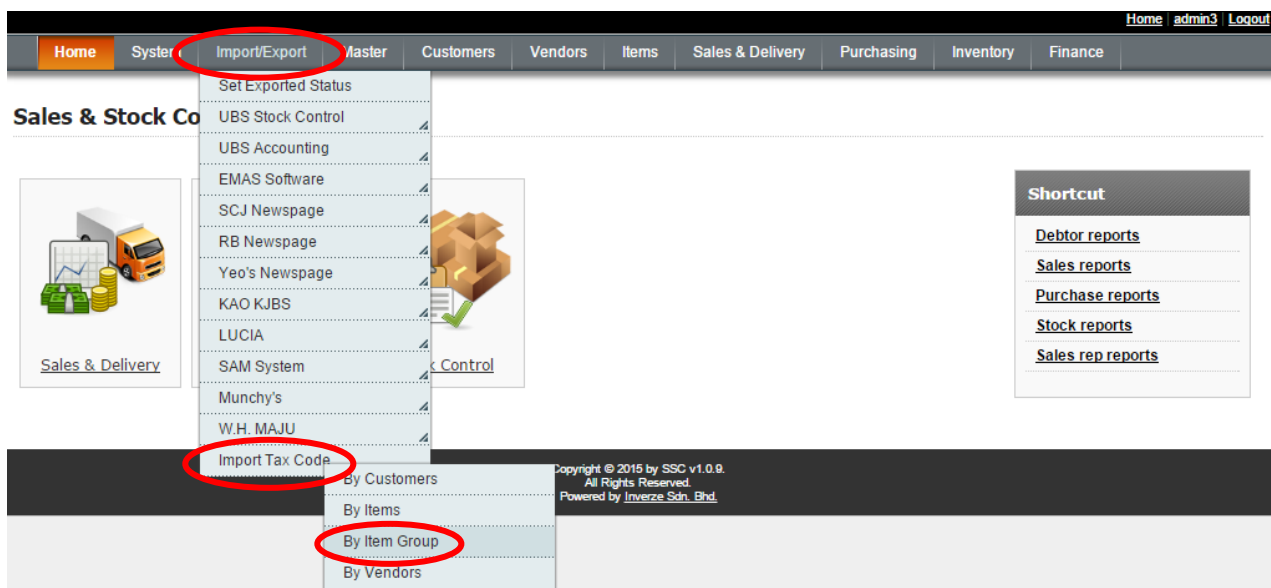
ITEM_TAX_CODE.CSV

110,920 bytes

2015-03-11 12:15:46

19. A message in red will show number of items updated.

c) Import GST Tax Code by Item Group



1. Go to Import/Export.
2. Select Import Tax Code.
3. Click By Item Group.

Home » Import/Export » Import Tax Code By Item Group

Import Tax Code By Item Group

Division: BS (selected) Description: BEANSENG

Company Name: BS (selected)

Export/Import Path: GENERAL

Details

ITEM_GROUP_TAX_CODE.CSV Choose File No file chosen

Encoding: Unicode (UTF-8)

Download Upload Import

4. Select the correct division.

Home » Import/Export » Import Tax Code By Item Group

18 records e exported

Import Tax Code By Item Group

Division

Division: GENERAL Description: GENERAL AGENCY

Company Name: XYZ SDN. BHD.

Export/Import Path: /var/www/gen

Details

ITEM_GROUP_TAX_CODE.CSV Choose File No file chosen

Encoding: Unicode (UTF-8)

Download Upload Import

Upload Files

File Name	Size	Date
ITEM_GROUP_TAX_CODE.CSV	443 bytes	2015-03-10 11:38:57

5. A message in red will show the number of item group exported.
6. Ensure the date and time is correct.

18 records e exported

Import Tax Code By Item Group

Division

Division: GENERAL Description: GENERAL AGENCY

Company Name: XYZ SDN. BHD.

Export/Import Path: /var/www/gen

Details

ITEM_GROUP_TAX_CODE.CSV Choose File No file chosen

Encoding: Unicode (UTF-8)

Download Upload Import

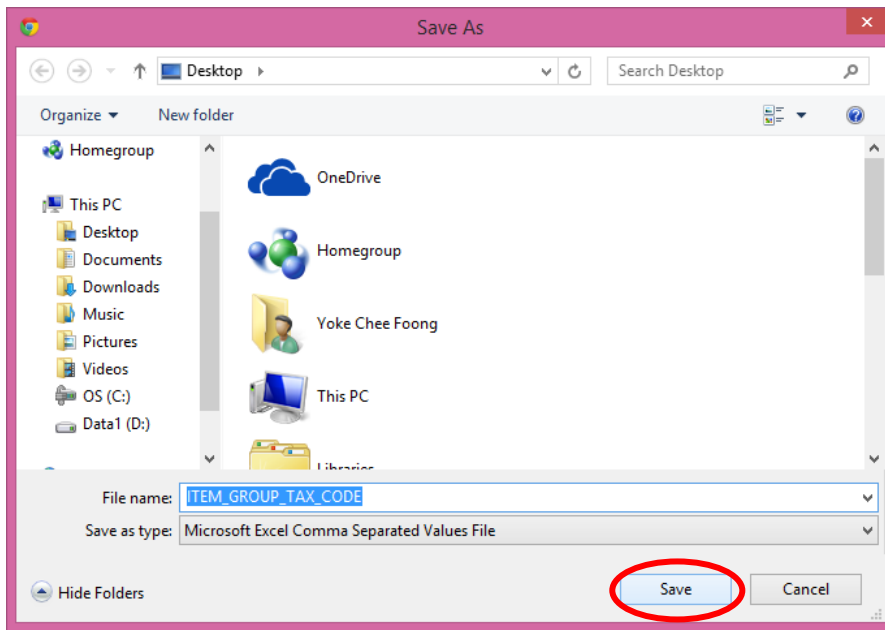
Upload Files

File Name	Size	Date
ITEM_GROUP_TAX_CODE.CSV	443 bytes	2015-03-10 11:38:57

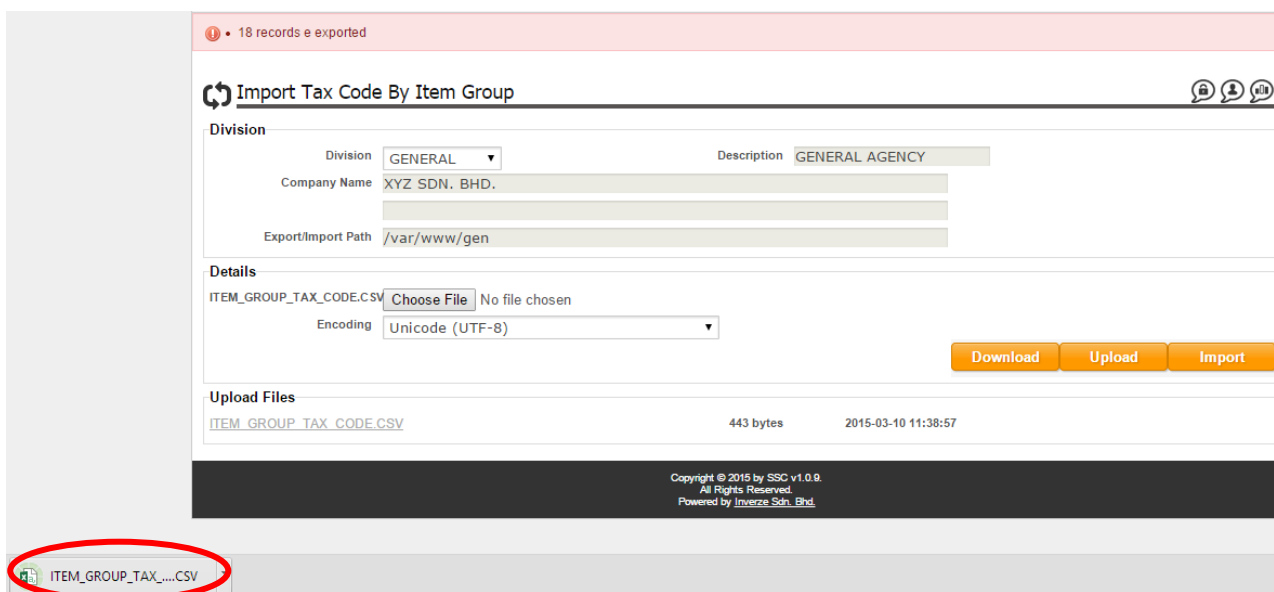
Open link in new tab
Open link in new window
Open link in incognito window
Save link as...
Copy link address

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7. Right click on the file link, click "Save Link As..."



8. Click SAVE.



9. Click on the file to open.

ITEM_GROUP_TAX_CODE - Excel

ITEM	DESCRIPTION	GST SALES TAX	GST PURCHASE TAX
1			
2			
3	B		
4	BOOM		
5	C		
6	CCR		
7	D		
8	DAIA		
9	F		
10	G		
11	GM		
12	K		
13	M		
14	QUAKER		
15	R		
16	S		
17	T		
18	W		
19	X		
20			

ITEM_GROUP_TAX_CODE

10. Fill in the GST Sales Tax & Purchase Tax for each item group.

Import Tax Code By Item Group

Division

Division: GENERAL Description: GENERAL AGENCY

Company Name: XYZ SDN. BHD.

Export/Import Path: /var/www/gen

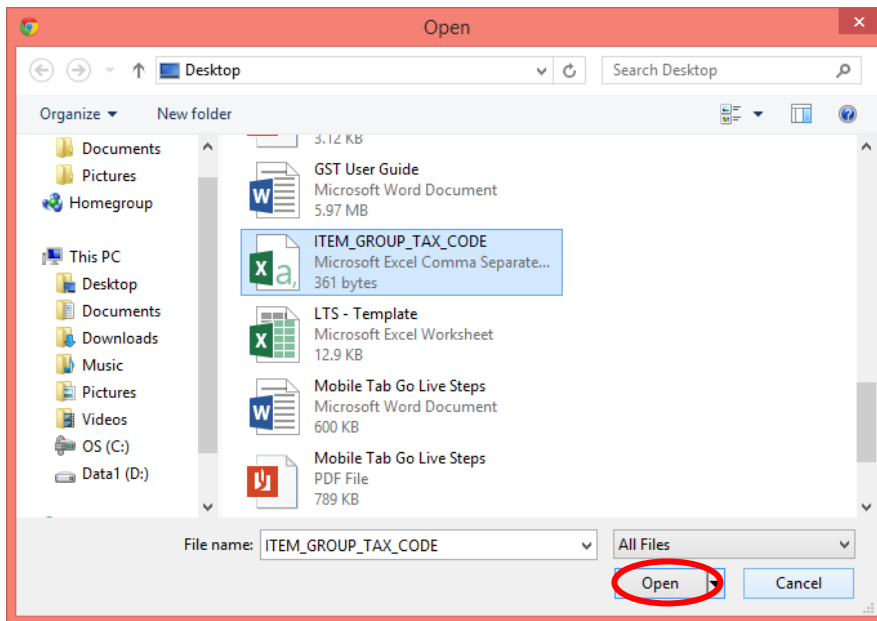
Details

ITEM_GROUP_TAX_CODE: .sv Choose File No file chosen

Encoding: Unicode (UTF-8)

Download Upload Import

11. Click Choose File.



12. Click OPEN.

Import Tax Code By Item Group

Division: GENERAL | Description: GENERAL AGENCY

Company Name: XYZ SDN. BHD.

Export/Import Path: /var/www/gen

Details

ITEM_GROUP_TAX_CODE.CSV | Choose File | ITEM_GRO...ODE.CSV

Encoding: Unicode (UTF-8)

Download | Upload | Import

13. The file name will appear beside the Choose File button.

14. Click UPLOAD.

Import Tax Code By Item Group



Division

Division

GENERAL

Description

GENERAL AGENCY

Company Name

XYZ SDN. BHD.

Export/Import Path

/var/www/gen

Details

ITEM_GROUP_TAX_CODE.CSV

Choose File

No file chosen

Encoding

Unicode (UTF-8)

Download

Upload

Import

Upload Files

ITEM_GROUP_TAX_CODE.CSV

361 bytes

2015-03-11 12:39:31

15. Ensure the date and time is correct.

Import Tax Code By Item Group



Division

Division

GENERAL

Description

GENERAL AGENCY

Company Name

XYZ SDN. BHD.

Export/Import Path

/var/www/gen

Details

ITEM_GROUP_TAX_CODE.CSV

Choose File

No file chosen

Encoding

Unicode (UTF-8)

Download

Upload

Import

Upload Files

ITEM_GROUP_TAX_CODE.CSV

361 bytes

2015-03-11 12:39:31

16. Click IMPORT.

Home » Import/Export » Import Tax Code By Item Group

18 records updated

Import Tax Code By Item Group



Division

Division

GENERAL

Description

GENERAL AGENCY

Company Name

XYZ SDN. BHD.

Export/Import Path

/var/www/gen

Details

ITEM_GROUP_TAX_CODE.CSV

Choose File

No file chosen

Encoding

Unicode (UTF-8)

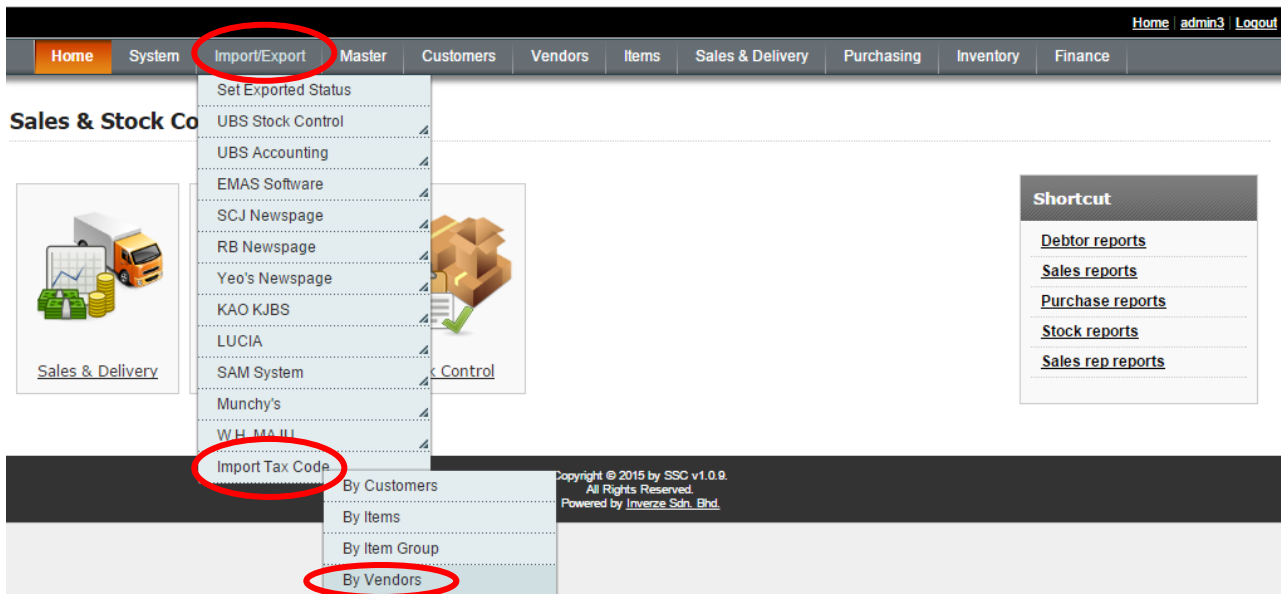
Download

Upload

Import

17. A message in red will show the numbers of item group updated.

d) Import GST Tax Code by Vendors



1. Go to Import/Export.
2. Select Import Tax Code.
3. Click By Vendors.

Import Tax Code By Vendors

Division: BS Description: BEANSENG

Company Name: BS

Export/Import Path: GENERAL

Details

VENDORS_TAX_CODE.CSV Choose File No file chosen

Encoding: Unicode (UTF-8)

Download Upload Import

4. Select the correct Division.

Import Tax Code By Vendors



Division

Division: Description:
 Company Name:
 Export/Import Path:

Details

VENDORS_TAX_CODE.CSV: No file chosen
 Encoding:

Download

Upload

Import

5. Click DOWNLOAD.

Home » Import/Export » Import Tax Code By Vendors

• 39 records e exported

Import Tax Code By Vendors



Division

Division: Description:
 Company Name:
 Export/Import Path:

Details

VENDORS_TAX_CODE.CSV: No file chosen
 Encoding:

Download

Upload

Import

Upload Files

VENDORS_TAX_CODE.CSV 5,349 bytes 2015-03-11 13:26:06

6. A message in red will show the number of records exported.

Import Tax Code By Vendors



Division

Division: Description:
 Company Name:
 Export/Import Path:

Details

VENDORS_TAX_CODE.CSV: No file chosen
 Encoding:

Download

Upload

Import

Upload Files

VENDORS_TAX_CODE.CSV 5,349 bytes 2015-03-11 13:26:06

7. Ensure the date and time is correct.

39 records e exported

Import Tax Code By Vendors



Division

Division: Description:

Company Name:

Export/Import Path:

Details

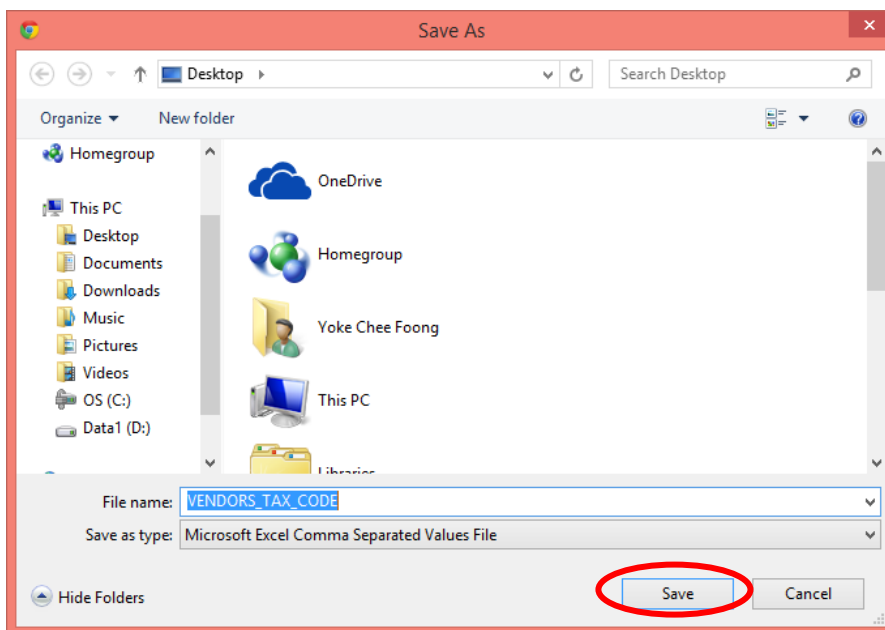
VENDORS_TAX_CODE.CSV No file chosen

Encoding:

Upload Files

VENDORS_TAX_CODE.CSV	5,349 bytes	2015-03-11 13:26:06
Open link in new tab Open link in new window Open link in incognito window Save link as... Copy link address Copyright © 2015 by SSC v1.0.9. All Rights Reserved. Powered by Inverze Sdn. Bhd.		

8. Right click the File Link.



9. Click SAVE.

Home » Import/Export » Import Tax Code By Vendors

39 records e exported

Import Tax Code By Vendors

Division

Division: GENERAL Description: GENERAL AGENCY

Company Name: XYZ SDN. BHD.

Export/Import Path: /var/www/gen

Details

VENDORS_TAX_CODE.CSV Choose File No file chosen

Encoding: Unicode (UTF-8)

Download Upload Import

Upload Files

VENDORS_TAX_CODE.CSV 5,349 bytes 2015-03-11 13:26:06

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VENDORS_TAX_CODE.CSV

10. Click on the file link to open.

VENDORS_TAX_CODE - Excel

VENDOR CODE	NAME	ADDRESS	CATEGORY	CATEGORY	STATUS	GST REG NO	GST SALES TAX	GST PURCHASE TAX
4000/BKG	BENTONG KIAN GUAN TRD SDN BHD	-	-	-	ACTIVE			
4000/CO1	CS BROTHER ENTERPRISE	NO:420,JA	-	-	ACTIVE			
4000/E01	E-PAY (M) SDN BHD	16-18,JLN	-	-	ACTIVE			
4000/E02	EAST POWER ENTERPRISE	-	-	-	ACTIVE			
4000/EAS	A M-OFFICE SYSTEM SDN BHD	LOT PT 23	-	-	ACTIVE			
400A/001	A.RAMLI FOODSTUFF SDN BHD	NO:6,PER	-	-	ACTIVE			
400A/002	ALLBRANDS GLOBAL SDN.BHD	3RD FLOO	-	-	ACTIVE			
400C/001	DAIANA MARKETING SDN.BHD.	NO 12,JAL	-	-	ACTIVE			
400C/002	CHIN LIP(E.B.B)TRADING SDN BHD	7115-7118	-	-	ACTIVE			
400D/001	DUTCH LADY MILK INDUSTRIES BERHAD	13, JALAN	-	-	ACTIVE			
400D/002	DKSH MALAYSIA SDN BHD	-	-	-	ACTIVE			
400E/001	EVERYPLUS MARKETING(M)SDN BHD(688448-A)	A25,ST500	-	-	ACTIVE			
400G/001	GOODMAID MARKETING SDN BHD	SUITE C-12	-	-	ACTIVE			
400G/002	GBA CORPORATION SDN.BHD.	WISMA GE	-	-	ACTIVE			
400H/001	HUAYI HANG(M)SDN BHD	NO:64,JAL	-	-	ACTIVE			
400H/002	HONG SOON AGENCY SDN.BHD.	LOT 32-A1	-	-	ACTIVE			
400J/001	JH KAJANG SDN BHD	NO:33,DE	-	-	ACTIVE			
400K/001	KIAT PANG TRADING SDN BHD	LOT 20C, J	-	-	ACTIVE			

11. Fill in the GST Registration Number, GST Sales Tax & Purchase Tax for each vendor.

Import Tax Code By Vendors



Division

Division: Description:

Company Name:

Export/Import Path:

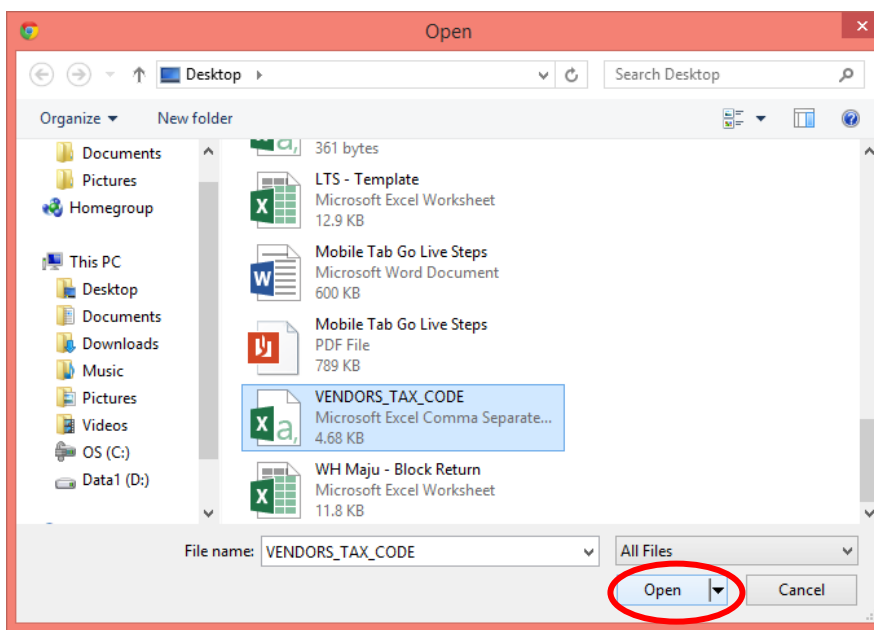
Details

VENDORS_TAX_CODE.CSV Choose File No file chosen

Encoding:

[Download](#) [Upload](#) [Import](#)

12. Click Choose File.



13. Click OPEN.

Import Tax Code By Vendors



Division

Division: Description:

Company Name:

Export/Import Path:

Details

VENDORS_TAX_CODE.CSV Choose File VENDORS_...ODE.CSV

Encoding:

[Download](#) [Upload](#) [Import](#)

14. The file name will appear beside the Choose File button.

15. Click UPLOAD.

Import Tax Code By Vendors



Division

Division

GENERAL

Description

GENERAL AGENCY

Company Name

XYZ SDN. BHD.

Export/Import Path

/var/www/gen

VENDORS_TAX_CODE.CSV

Choose File

No file chosen

Encoding

Unicode (UTF-8)

Download

Upload

Import

Upload Files

VENDORS_TAX_CODE.CSV

4,798 bytes

2015-03-11 13:55:36

16. Ensure the date & time is correct.

Import Tax Code By Vendors



Division

Division

GENERAL

Description

GENERAL AGENCY

Company Name

XYZ SDN. BHD.

Export/Import Path

/var/www/gen

VENDORS_TAX_CODE.CSV

Choose File

No file chosen

Encoding

Unicode (UTF-8)

Download

Upload

Import

Upload Files

VENDORS_TAX_CODE.CSV

4,798 bytes

2015-03-11 13:55:36

17. Click Import.

39 records updated

Import Tax Code By Vendors



Division

Division

GENERAL

Description

GENERAL AGENCY

Company Name

XYZ SDN. BHD.

Export/Import Path

/var/www/gen

VENDORS_TAX_CODE.CSV

Choose File

No file chosen

Encoding

Unicode (UTF-8)

Download

Upload

Import

Upload Files

VENDORS_TAX_CODE.CSV

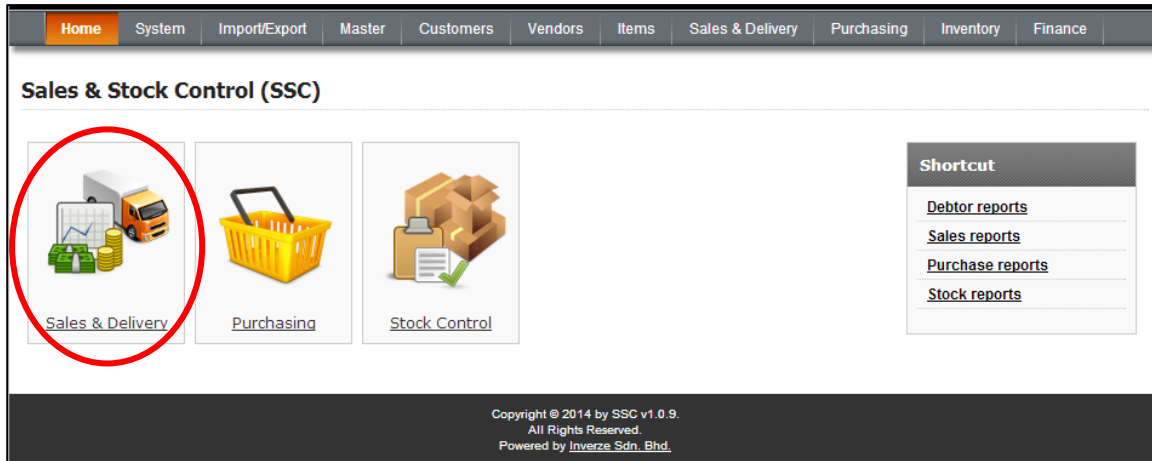
4,798 bytes

2015-03-11 13:55:36

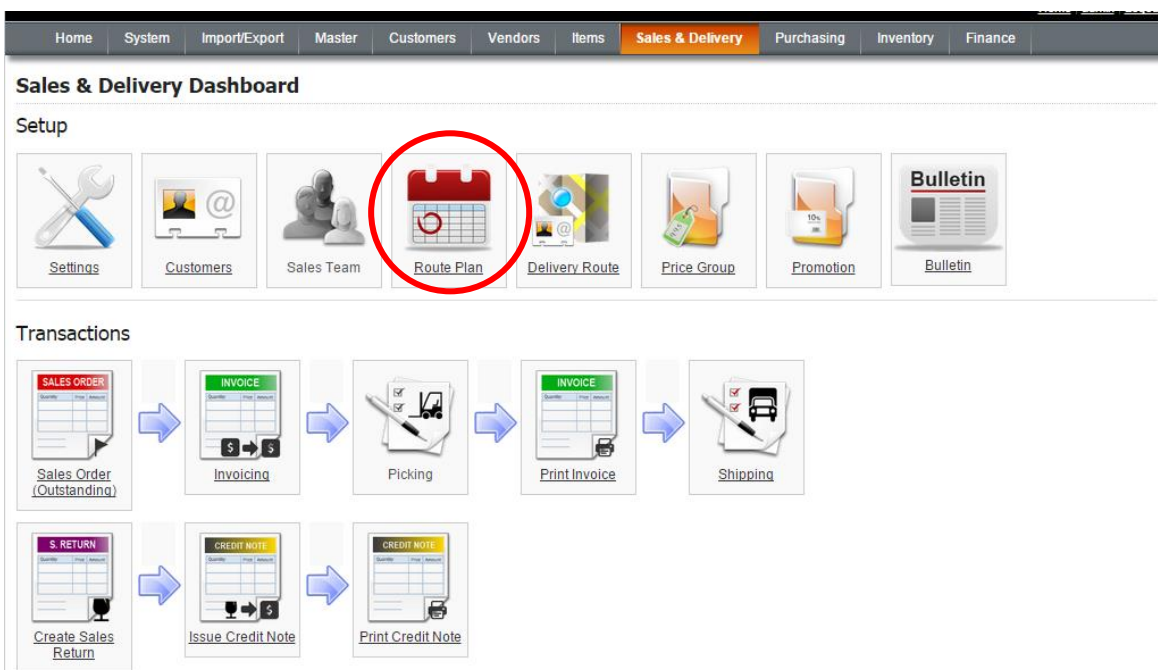
18. A message in red will show number of vendors updated.

ROUTE PLAN

Create Route Plan (Excel Template)



1. Click Sales & Delivery.



2. Click Route Plan.

Home » Route Plans

Division

Division

Company Name

Description

Salesman *

[Search](#)

[Import](#) | [Manage](#) | [Create](#)

February, 2015						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22

3. Click Import.

Home » Sales & Delivery » Route Plans » Import

Division

Division

Description

Company Name

Salesman * All Salesman

[Download](#)

Details

Import to division

Division

Clear data after date

Upload Excel File No file chosen

[Upload](#)

[Cancel](#)

Upload Files

[General_2015-02-10_C1_ROUTEPLAN.xlsx](#)

16,317 bytes

2015-02-10 12:21:43

4. Click the magnifying glass to find salesman.

Home » Sales & Delivery » Route Plans » Import

Division

Division: General
Description: General
Company Name: LEAN TEIK SOON SDN. BHD.
Salesman: N88 ☒ All Salesman

Download

Details

Import to division

Division: General
Clear data after date: 01-03-2015
Upload Excel File: Choose File No file chosen

Upload **Cancel**

Upload Files

General_2015-02-10_C1_ROUTEPLAN.xlsx 16,317 bytes 2015-02-10 12:21:43

5. Or, tick check box of All Salesman to download all salesman in one template.
6. Click DOWNLOAD.

Home » Sales & Delivery » Route Plans » Import

Division

Division: General
Description: General
Company Name: LEAN TEIK SOON SDN. BHD.
Salesman: N88 ☐ All Salesman

Download

Details

Import to division

Division: General
Clear data after date: 01-03-2015
Upload Excel File: Choose File No file chosen

Upload **Cancel**

Upload Files

General_2015-02-10_C1_ROUTEPLAN.xlsx 16,317 bytes 2015-02-10 12:21:43

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General_2015-02-27_...xls

7. Salesman route plan in excel format will be downloaded.

General_2015-02-27_N88_ROUTEPLAN - Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
	distributo	salesman	salesman	customer	customer	address	area	visit_1	visit_2	visit_3	visit_4	visit_5	visit_6	visit_7	visit_8	visit_9	visit_10	month	year		
2	General	N88	Office Sali 3000/B28	BOULEVAI	BOULEVAI	MIRI												3	2015		
3	General	N88	Office Sali 3000/B35	BOULEVAI	1.01-4.0	MIRI												3	2015		
4	General	N88	Office Sali 3000/C12	CASH SALI														3	2015		
5	General	N88	Office Sali 3000/C38	CHERRY M.P.O BOX 1	KOTA KINABALU													3	2015		
6	General	N88	Office Sali 3000/001	UNKNOWN														3	2015		
7	General	N88	Office Sali 3000/A18	ABBOTT L		PENANG												3	2015		
8	General	N88	Office Sali 3000/B40	BAD & DO														3	2015		
9	General	N88	Office Sali 3000/U01	WHOLESA NO. 1&2 V	KOTA KINABALU													3	2015		
10	General	N88	Office Sali 3000/C45	MDS MAR NO.58 L	BINTULU													3	2015		
11	General	N88	Office Sali 3000/T03	THE STORI														3	2015		
12	General	N88	Office Sali 3000/G02	GREEN CH														3	2015		
13	General	N88	Office Sali 3000/B03	BOULEVAI LOT 398-4	KUCHING													3	2015		
14	General	N88	Office Sali 3000/F14	FRIENDLY NO.2-12, J	SARAWAK													3	2015		
15	General	N88	Office Sali 3000/K22	KIM GUAN NO.12, LO	KOTA KINABALU													3	2015		
16	General	N88	Office Sali 3000/K24	KRIAN RES NO.12 MU	KUCHING													3	2015		
17	General	N88	Office Sali 3002/G00	TRADE DE														3	2015		
18	General	N88	Office Sali 3000/T88	TF VALUE- NO.1, PER	SUNGAI SIPUT													3	2015		
19	General	N88	Office Sali 3000/C17	CHAU SUI LOT NO.1	SANDAKAN													3	2015		
20	General	N88	Office Sali 3000/H38	HEXTAR C LOT 5, JAL	SELANGOR													3	2015		

8. Only fill in the date of visit (column H to Q) into visit 1-10 column.
9. Column R – Month – is the month of route plan, example 3 is March.
10. Column S – Year – is the year of the route plan.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	
	distributo	salesman	salesman	customer	customer_name	address	area	visit_1	visit_2	visit_3	visit_4	visit_5	visit_6	visit_7	visit_8	visit_9	visit_10	month	year	
17	General	N88	Office Sali 3002/G001	TRADE DEBTOR-GIANT GROUP														3	2015	
18	General	N88	Office Sali 3000/T88	TF VALUE-MARK SDN BHD		NO.1, PER SUNGAI SIPUT												3	2015	
19	General	N88	Office Sali 3000/C17	CHAU SUI TECK (BDC) SDN BHD		LOT NO.1: SANDAKA		4	12	19	26							3	2015	
20	General	N88	Office Sali 3000/H38	HEXTAR CHEMICALS SDN BHD		LOT 5, JAL SELANGOR												3	2015	
21	General	N88	Office Sali 3000/D03	SPEED -D CORPORATE HOLDING		LOT 141-D SHAH ALAM												3	2015	
22	General	N88	Office Sali NEW04	NEW OUTLET 04														3	2015	
23	General	N88	Office Sali NEW05	NEW OUTLET 05														3	2015	

11. Example, salesman N88 plan to visit customer Chau Sui Teck (BDC) Sdn Bhd once a week:
 - a. Visit 1 – 4th March 2015
 - b. Visit 2 – 12th March 2015
 - c. Visit 3 – 19th March 2015
 - d. Visit 4 – 26th March 2015
12. Save and close the file.

NOTE:

1. PLEASE DO NOT CHANGE THE FIELD HEADER.
2. THE FILE NAME MUST BE SAVE EXACTLY SAME AS DOWNLOADED FROM SSC.

Upload Route Plan (Excel Template)

Home » Sales & Delivery » Route Plans » Import

Division

Division: Description:

Company Name:

Salesman *: ☐ All Salesman

[Download](#)

Details

Import to division

Division:

Upload Excel File: No file chosen

Clear data after date:

[Upload](#) [Cancel](#)

Upload Files

General	2015-02-10	C1	ROUTEPLAN.xlsx	16,317 bytes	2015-02-10 12:21:43	X

1. If the route plan template is uploaded second time to replace the first file (normally it happens when you want to amend the route plan), it will duplicate the route plan record.
2. Hence, the "Clear Data After Date" must set, and the system will clear the data to avoid duplicate data.
3. Please take note that the route plan of today and previous days are not amendable.
4. In example, date now is 12th February, and February route plan need to re-upload again. So the "Clear Data After Date" will need to set 13th February. All the old data from 13th February onwards will be clear. And the new February route plan will be uploaded.

Home » Sales & Delivery » Route Plans » Import

Division

Division: Description:

Company Name:

Salesman *: ☐ All Salesman

[Download](#)

Details

Import to division

Division:

Upload Excel File: No file chosen

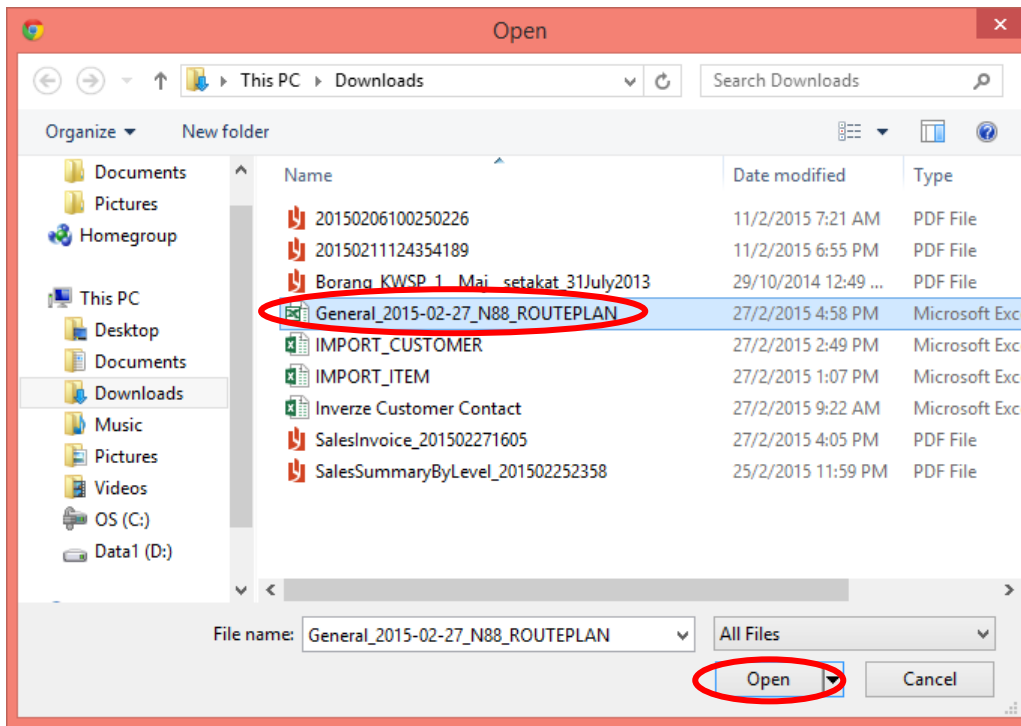
Clear data after date:

[Upload](#) [Cancel](#)

Upload Files

General	2015-02-10	C1	ROUTEPLAN.xlsx	16,317 bytes	2015-02-10 12:21:43	X

5. Click Choose File.



6. Browse to the file location.
7. Select the route plan file.
8. Click OPEN.

Home » Sales & Delivery » Route Plans » Import

Division

Division: Description:

Company Name:

Salesman: ☐ All Salesman

[Download](#)

Details

Import to division

Division: Clear data after date:

Upload Excel File: [Choose File](#)

[Upload](#) [Cancel](#)

Upload Files

General_2015-02-10_C1_ROUTEPLAN.xlsx	16,317 bytes	2015-02-10 12:21:43 X
--------------------------------------	--------------	--

9. The file name will appeared beside Choose File button.

Home » Sales & Delivery » Route Plans » Import

Division

Division Description
 Company Name
 Salesman * ☐ All Salesman

Download

Details

Import to division

Division Clear data after date ☐ ☐
 Upload Excel File General_20...EPLAN.xls

Upload

Cancel

Upload Files

General_2015-02-10_C1_ROUTEPLAN.xlsx	16,317 bytes	2015-02-10 12:21:43	☐
--------------------------------------	--------------	---------------------	--------------------------

10. Click Upload.

Home » Sales & Delivery » Route Plans » Import

✓ All route plan was imported..

Division

Division Description
 Company Name
 Salesman * ☐ All Salesman

Download

Details

Import to division

Division Clear data after date ☐ ☐
 Upload Excel File No file chosen

Upload

Cancel

Upload Files

General_2015-02-10_C1_ROUTEPLAN.xlsx	16,317 bytes	2015-02-10 12:21:43	☐
General_2015-02-27_N88_ROUTEPLAN.xls	10,513 bytes	2015-02-27 17:12:43	☐

11. A green message will show the route plan imported.

12. All uploaded files will remain and pile up at the Upload Files section.

13. If you wish to delete, you may click the red cross button to remove the file link.

View Route Plan

Home » Route Plans

Division

Division: Company Name:

Description:

Salesman * 

[Search](#)

[Import](#) | [Manage](#) | [Create](#)

February, 2015						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22

1. Enter salesman code in search box or click magnifying glass to view.

Home » Route Plans

Division

Division: Company Name:

Description:

Salesman * 

[Search](#)

[Import](#) | [Manage](#) | [Create](#)

February, 2015						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	1

2. Click Search.

Division

Division Company Name

Description

Salesman *

[Import](#) | [Manage](#) | [Create](#)

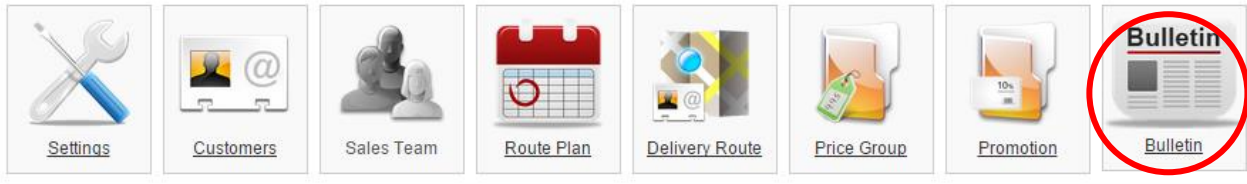
March, 2015						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
23	24	25	26	27	28	1
2	3	4 1) 3000/T88 - TF VALUE-MARK SDN BHD 2) 3000/C17 - CHAU SUI TECK (BDC) SDN BHD	5	6	7	8
9	10	11	12 1) 3000/T88 - TF VALUE-MARK SDN BHD 2) 3000/C17 - CHAU SUI TECK (BDC) SDN BHD	13	14	15
16	17	18	19 1) 3000/T88 - TF VALUE-MARK SDN BHD 2) 3000/C17 - CHAU SUI TECK (BDC) SDN BHD	20	21	22
23	24	25	26	27	28	29

3. Click the arrow to look for month wanted to view route plan.

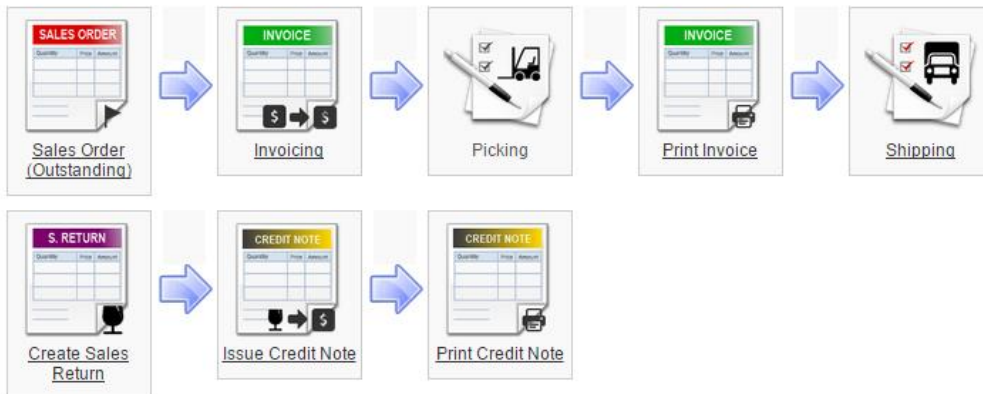
MOBILE BULLETIN

Sales & Delivery Dashboard

Setup



Transactions



1. Click Bulletin.

Home System Import/Export Master Customers Vendors Items **Sales & Delivery** Purchasing Inventory Finance

Home » Sales & Delivery » Mobile Bulletins

Manage Mobile Bulletins

Create

Displaying 1-4 of 4 results.

Last Updated	Updater	Created	Creator	Subject	Division	Urgent	
2015-02-13 13:16:14	Ng	2015-02-13 13:16:14	Ng	EVERYONE ALERT	ALL	Y	
2015-02-10 13:07:52	admin	2015-02-10 13:07:52	admin	Good day hello	ALL	N	
2015-02-10 10:25:47	admin	2015-02-10 10:25:47	admin	Good Day Everyone	ALL	N	
2015-02-10 10:23:19	admin	2015-02-10 10:23:19	admin	Good Morning LTS	ALL	N	

2. Click Create.

Create Mobile Bulletin

General

Subject *

Division * ALL

Urgent ☐

Note 01

Photo 01 Choose File No file chosen

Create Cancel

3. Fill in the Subject – Message Header.
4. Urgent – Tick the box if Urgent Attention required.
5. Note 01 – Fill in the message.
6. Photo01 – Click Choose File to select the picture.
7. Then, click Create.

Manage Mobile Bulletins

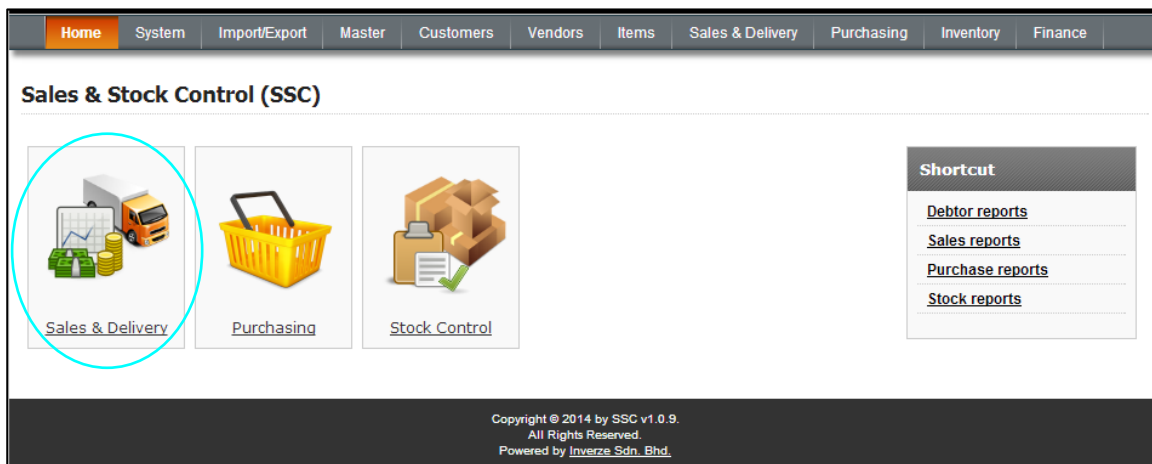
Displaying 1-4 of 4 results.

Last Updated	Updater	Created	Creator	Subject	Division	Urgent	
2015-02-13 13:16:14	Ng	2015-02-13 13:16:14	Ng	EVERYONE ALERT	ALL	Y	 
2015-02-10 13:07:52	admin	2015-02-10 13:07:52	admin	Good day hello	ALL	N	 
2015-02-10 10:25:47	admin	2015-02-10 10:25:47	admin	Good Day Everyone	ALL	N	 
2015-02-10 10:23:19	admin	2015-02-10 10:23:19	admin	Good Morning LTS	ALL	N	 

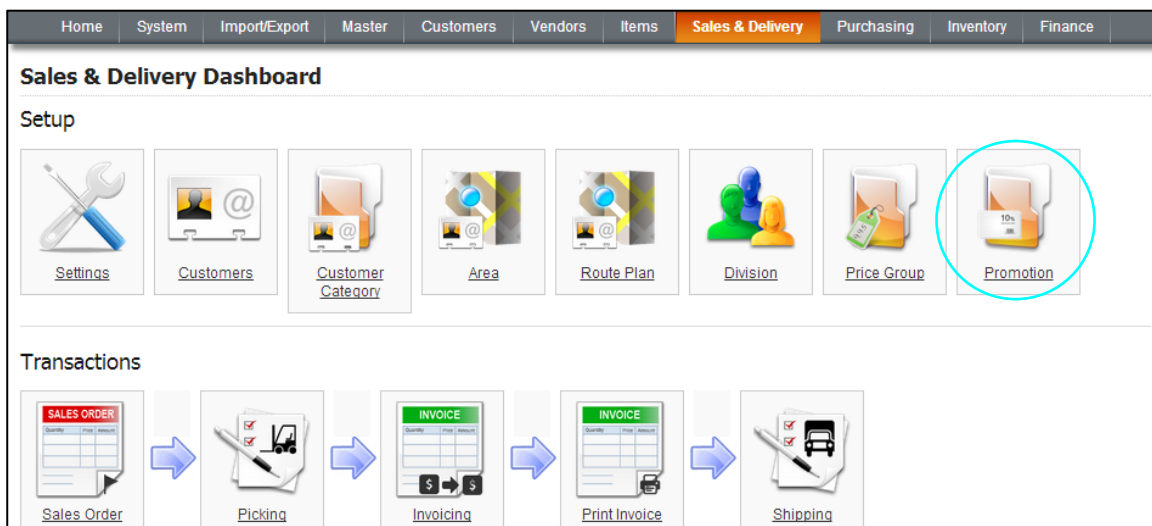
8. Click the Red Cross to delete the message if no longer needed.

PROMOTION & OFFER

Go to Promotion Section



1. Click Sales & Delivery



2. Click Promotion

Create Promotion

Home » Sales & Delivery » Promotions » Manage

Manage Promotions

Advanced Search

Validity date

Displaying 1-11 of 11 results.

Code	Description	Type	Valid From	Valid To	Is Active
AKKFOC	B ESSENCE CHICKEN PROMO	Q	08-05-2014	31-05-2014	Y
BBN 70GM		P	17-04-2014	17-04-2014	Y
new promo		P	17-04-2014	01-04-2015	Y

1. Click on the **Create** button
2. Select promotion **Type** from the drop-down menu

Promotion Types:-

Create Promotion

General

Type: **PRICE OFF**

Code:

Description:

Description 01:

Description 02:

Valid From:

Valid To:

Remark:

PRICE OFF
QTY DISC
BASKET - QUANTITY
BASKET - VALUE
NPD
MUST SELL
FLEXI DISC

- Price Off – Offer based on price value, eg:
 - Order value hit RM300 get 4% discount
 - Order 10 ctn get 4% discount
- Qty Disc – Offer based on order quantity, eg:
 - Order 10 ctn FOC 1 ctn
 - Order value hit RM 1,000 FOC 1 ctn
- Basket Qty – Offer based on fixed quantity set, eg:
 - Order 1 set which included Item A (2 ctn) + Item B (2 ctn), and FOC – Item C (1 ctn)
 - Order 1 set which included Item A (2 ctn)+ Item B (2 ctn), at promotional price of RM 100
- Basket Value – Offer based on fixed value set, eg:
 - Order 1 set which included Item A (2 ctn) + Item B (2 ctn), at promotional price of RM 66
 - Order 1 set which included Item A (2 ctn) + Item B (2 ctn), discount 30% on each item
- NPD – Introductory of new product launched
- Must Sell – Must Sell SKU
- Flexi Disc – To give maximum discount % and allow the salesman to edit the discount %, eg:
 - Order Item A, get discount 10% + 3%. Meaning the salesman can amend the discount % to any figure below 10% and 3%, eg: 8.77% + 2.8%

A. Create New Promotion

Update Promotion [Testpromo5]

CREATED : admin2 [2014-06-13 18:04:34] LAST UPDATED : admin2 [2014-06-13 18:04:34]

General

Type: PRICE OFF

Code: Testpromo5

Price Group: PG1

Description: Item A or B or C hit RM 1000 FOC 1 Ctn Item D

Description 01:

Description 02:

Valid From: 01-06-2014

Valid To: 31-08-2014

Remark:

Is Active: ☒

1. Select Type, enter code, and description.
2. Valid From, Valid To - Select promotion start date and end date***

*** Promotion will be valid only if Invoice Date falls within the validity period.

3. Select validation by Qty or Value
 - By Qty – if the promotion is validate by Qty
 - By Value – if the promotion is validate by value

Create New Promotion Validate by Value

- Item A + Item B + Item C (mixable)= hit RM 1,000 - FOC 1 CTN Item D

Validation

Validation by: Value

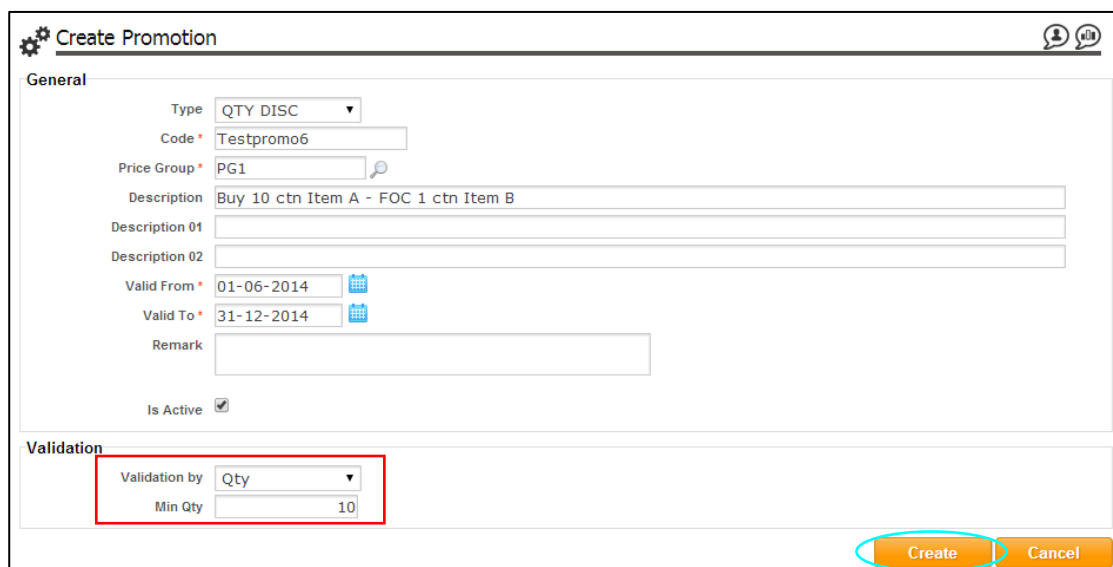
Min Amt: 1,060.00

Create Close

1. Choose **Validate by Value**
2. Enter **Min Amt** - 1,060.00 (Amount must be included GST)
3. Then, click **Create** Button

Create New Promotion Validate by QTY

- Buy 10 cartons Item A - FOC 1 carton Item B



Create Promotion

General

Type: QTY DISC

Code: Testpromo6

Price Group: PG1

Description: Buy 10 ctn Item A - FOC 1 ctn Item B

Description 01:

Description 02:

Valid From: 01-06-2014

Valid To: 31-12-2014

Remark:

Is Active: ☒

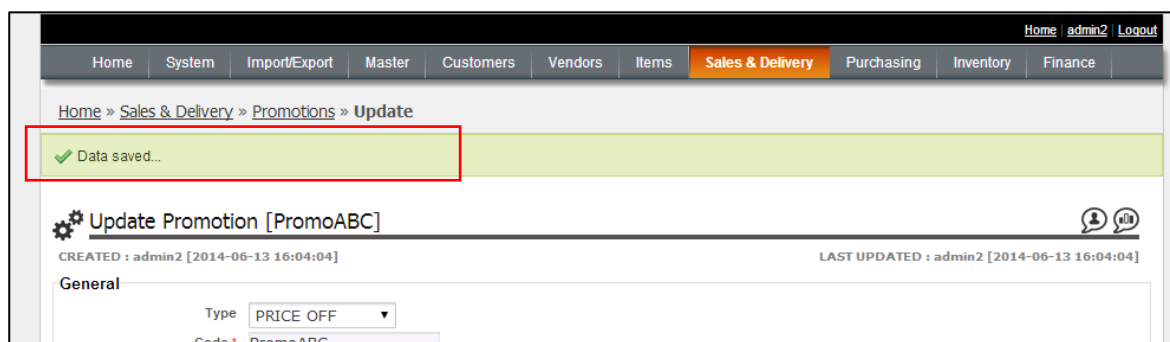
Validation

Validation by: Qty

Min Qty: 10

Create Cancel

- Choose Validation by Qty
- Enter **Min Qty** – 10
- Click Create Button



Home admin2 Logout

Home System Import/Export Master Customers Vendors Items Sales & Delivery Purchasing Inventory Finance

Home > Sales & Delivery > Promotions > Update

✓ Data saved...

Update Promotion [PromoABC]

CREATED : admin2 [2014-06-13 16:04:04] LAST UPDATED : admin2 [2014-06-13 16:04:04]

General

Type: PRICE OFF

Code: PromoABC

- A successful message will be showed. The New Promo Code is created.

B. Create Promotion Lines

Validation

Validation by

Min Amt

Promotion Lines

[Group](#) | [Ungroup](#) | [Delete](#) | [Create](#)

#	Grouping	Item	Description	Qty	UOM	Price / UOM	Discount
No results found.							

Promotion Details

[Pictures](#) | [Customers](#) | [Channels](#) | [Division Allocation](#)

[Add image](#)

Picture	Description
No results found.	

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1. Go to Promotion Lines section, click **Create** to create promotion line

Create Promotion Line [Testpromo5]

Fields with * are required.

General

* Grouping

Item * EQUAL SACHET 12S X12BOX X12DOZ

UOM *

Qty

Price / UOM F.O.C. ☐

Description

Discount Tax % 01

Disc % 02 Tax % 02

Disc % 03 Tax % 03

Disc % 04 Tax % 04

Disc Amt

Remark

1. **Item** – search the item by clicking on the magnifying glass or key in the item code directly
2. **UOM** – select UOM
3. **Qty** – default as 0
4. Then, click **Create**.
5. Create the 2nd, 3rd and so forth promotion lines by repeat same steps.

Create Promotion Line [Testpromo5]

Fields with * are required.

General

* 4 Grouping

Item * D007166 SUN UP ORANGE 850ML X 12BTL

UOM * CTN

Qty 1.00

Price / UOM 0.0000 F.O.C. ☒

Description SUN UP ORANGE 850ML X 12BTL

Discount 0.00 Tax % 01 0.00

Disc % 02 0.00 Tax % 02 0.00

Disc % 03 0.00 Tax % 03 0.00

Disc % 04 0.00 Tax % 04 0.00

Disc Amt 0.0000

Remark

Create **Cancel**

6. Create promotion line for FOC item, enter FOC QTY,
7. Tick the **F.O.C** box. Price will be 0.000
8. Then, click **Create** button.

Create Promotion Line [Testpromo8]

Fields with * are required.

General

* 1 Grouping

Item * D002323 M&M'S PLAIN 100GM X20PKT X6

UOM * CTN

Qty 0.00

Price / UOM 428.4000 F.O.C. ☐

Description M&M'S PLAIN 100GM X20PKT X6

Discount 5.00 Tax % 01 0.00

Disc % 02 0.00 Tax % 02 0.00

Disc % 03 0.00 Tax % 03 0.00

Disc % 04 0.00 Tax % 04 0.00

Disc Amt 0.0000

Remark

Create **Cancel**

9. Create promotion line for discount %
10. Discount box – key in discount percentage
11. Then, click **Create** button.

Create Promotion Line [Testpromo5]

Fields with * are required.

General

* 5

Item *

UOM * (none)

Qty 0.00

Price / UOM 0.0000

Description

Discount 0.00

Disc % 02 0.00

Disc % 03 0.00

Disc % 04 0.00

Disc Amt 0.0000

Remark

Grouping

F.O.C. ☐

Tax % 01 0.00

Tax % 02 0.00

Tax % 03 0.00

Tax % 04 0.00

Create

Cancel

12. Once done, click **Cancel** button to return to the page of the Promotion.

C. Update Promotion Details

Promotion Lines [Group](#) | [Ungroup](#) | [Delete](#) | [Create](#)

Total 4 results.

#	Grouping	Item	Description	Qty	UOM	Price / UOM	Discount	
1		D004310	EQUAL SACHET 12S X12BOX X12DOZ	0.00	CTN	341.2800	N/A	
2		D005265	KLK CORN FLAKES 150GMX18BOX	0.00	CTN	55.9800	N/A	
3		D006067	OVALTINE TIN 1.2KG X 6TIN	0.00	CTN	87.9000	N/A	
4		D007166	SUN UP ORANGE 850ML X 12BTL	1.00	CTN	0.0000	N/A	

Promotion Details

[Pictures](#) | [Customers](#) | [Channels](#) | [Categories](#) | [Division Allocation](#)

[Add image](#)

Picture	Description
No results found.	

- Go to Promotion Details section, edit the promotion details at different tabs

Pictures

Promotion Details

[Pictures](#) | [Customers](#) | [Channels](#) | [Categories](#) | [Division Allocation](#)

[Add image](#)

Picture	Description
No results found.	

- Upload the promotion picture by clicking Add Image

Customers

Promotion Details

[Pictures](#) | [Customers](#) | [Channels](#) | [Categories](#) | [Division Allocation](#)

[Assign Customers](#) | [Assign Customers By File](#)

Division	Customer	Ref No	Company Name	Actions
No results found.				

- Click Assign Customers

Promotion : Assign Customers

Promotion

Code: Testpromo5

Description: Item A or B or C hit RM 1000 FOC 1 Ctn Item D

Valid From: 01-06-2014 - 31-08-2014

Search

Division: BRANDS
GENERAL

Area: A
B
C
D
E

Category: CFS
CMH
CVS
MANUFACTUR
MMK

Channel: MT

Code:

Ref Code:

Company Name:

Active: ☒ Show Unassigned Only: ☒

Search **Close**

2. Search the customer by division, category, or area that you wish to assign
3. Then click Search button

Total 1 result

☒	Division	Code	Ref Code	Company	Active	Area	Category	Channel
☒	GENERAL	300H/030	300H/030	HENG KEE	Y	B	CFS	

Assign

4. The list of customer will be appear at the bottom of the page
5. Tick the customer by line or tick the header box to select all customers that fall under the search criteria
6. Then, click Assign button

Customers assigned ...

Update Promotion [Testpromo5]

CREATED : admin2 [2014-06-13 18:04:34] LAST UPDATED : admin2 [2014-06-13 18:04:34]

General

Type: PRICE OFF

Code: Testpromo5

Price Group: PG1

Description: Item A or B or C hit RM 1000 FOC 1 Ctn Item D

Description 01:

7. Once successfully assigned, a successful message will be showed.

Categories

Promotion Details

Pictures Customers Channels **Categories** Division Allocation

Assign Categories

Category	Actions
No results found.	

1. Assign promotion by customer category. Click Assign Categories

Category

☐	unassigned - unassigned
☐	MMK - MMK
☐	PSH - PSH
☐	PET - PET
☐	SUN - SUN
☐	PHA - PHA
☐	CVS - CVS
☐	OTH - OTH
☒	SPM - SPM
☐	CMH - CMH
☐	MANUFACTUR - MANUFACTURER
☒	WHS - WHS
☐	CFS - CFS
☐	VET - VET

Assign Close

2. Tick on the customer category that you wish to assign the promotion.
3. Then, click Assign button

✓ Category(s) assigned ...

Update Promotion [Testpromo5]

CREATED : admin2 [2014-06-13 18:04:34] LAST UPDATED : admin2 [2014-06-13 18:04:34]

General

Type: PRICE OFF

Code: Testpromo5

Price Group: PG1

Description: Item A or B or C hit RM 1000 FOC 1 Ctn Item D

4. Once successfully assigned, a successful message will be showed

Save Promotion

Validation

Validation by: Qty
Min Qty: 1

Promotion Lines

Group | Ungroup | Delete | Create

Total 4 results.

#	Grouping	Item	Description	Qty	UOM	Price / UOM	Discount
1		D004310	EQUAL SACHET 12S X12BOX X12DOZ	0.00	CTN	341.2800	N/A
2		D005265	KLG CORN FLAKES 150GMX18BOX	0.00	CTN	55.9800	N/A
3		D006067	OVALTINE TIN 1.2KG X 6TIN	0.00	CTN	87.9000	N/A
4		D007166	SUN UP ORANGE 850ML X 12BTL	1.00	CTN	0.0000	N/A

Promotion Details

Pictures Customers Channels Categories Division Allocation

1. Once assign done, click Save to update this promotion code

Home » Sales & Delivery » Promotions » Update

✓ Data updated...

Update Promotion [Testpromo5]

CREATED : admin2 [2014-06-13 18:04:34] LAST UPDATED : admin2 [2014-06-13 21:35:15]

General

Type: PRICE OFF
Code: Testpromo5
Price Group: PG1
Description: Item A or B or C hit RM 1000 FOC 1 Ctn Item D
Description 01:
Description 02:
Valid From: 01-06-2014
Valid To: 31-08-2014
Remark:
Is Active: ☒

Validation

Validation by: Qty
Min Qty: 1

Save Close

2. Once details updated, a successful message will be showed.
3. Then, click Close button.

Displaying 1-14 of 14 results.

Code	Description	Type	Valid From	Valid To	Is Active	
AKKFOC	B ESSENCE CHICKEN PROMO	Q	08-05-2014	31-05-2014	Y	 
BBN 70GM		P	17-04-2014	17-04-2014	Y	 
new promo		P	17-04-2014	01-04-2015	Y	 
PROMO 2	Promo 2	N	01-04-2003	04-04-2022	Y	 
PROMO 3	3 grouping	N	01-01-2014	01-01-2015	Y	 
PROMO1	Promo	D	02-12-2012	12-04-2022	Y	 
PromoABC	Item A or B or C - hit total RM1,000 FOC 1 ctn Item D	P	13-06-2014	13-06-2014	Y	 
Testpromo1		P	01-06-2014	30-06-2014	Y	 
Testpromo2	Buy 6.5 ctn FOC 0.5 ctn + 4% disc (WS customer)	P	01-06-2014	31-05-2015	Y	 
Testpromo2A	Buy <6.5 ctn - 4% disc (WS customer)	P	01-06-2014	31-05-2015	Y	 
Testpromo2B	Buy 6.5 ctn FOC 0.5 ctn (General customer)	P	01-06-2014	31-05-2015	Y	 
Testpromo3	Buy 6.5 ctn FOC 0.5 ctn + 4% disc (WS Customer) - v2	B	01-06-2014	31-05-2015	Y	 
Testpromo4	Product Category A or B or C - hit total RM1,000 FOC 1 ctn M&M's 200g	P	01-06-2014	31-05-2015	Y	 
Testpromo5	Item A or B or C hit RM 1000 FOC 1 Ctn Item D	P	01-06-2014	31-08-2014	Y	 

- Promotion code "Testpromo5" was created.
- You may edit this promotion package by clicking Update

Update

D. Grouping Promotion Lines

Example 1:

- Buy 10 Carton Item A
- FOC 1 pack choose from Item B or Item C
- To enable the flexibility to choose 1 FOC item either Item B or Item C (meaning 2 choose 1)
 1. Create 2 promotion lines for FOC item

Promotion Lines

[Group](#) [Ungroup](#)

Displaying 1-3 of 3 results.

#	Grouping	Item	Description	Qty	UOM	Price / UOM	Discount	
☐	1	D000023	M&M'S PEANUT 200GM X 24PKT	0.00	CTN	161.2800	N/A	
☒	2	D002333	SNICKERS PEANUT 59G X24P X8	1.00	PKT	0.0000	N/A	
☒	3	D002425	SNICKERS ALMOND 50G X24PK X8	1.00	PKT	0.0000	N/A	

2. Tick selection box of both FOC items.
3. Then click Group

Create Promotion Line Grouping [TPgroup1]

Create promotion grouping with the following lines?

Grouping: 2VK

No. of items to choose: 1

Total 2 results

#	Grouping	Item	Description	Qty	UOM	Price / UOM	Discount	Disc % 02	Disc % 03	Disc % 04
2		D002333	SNICKERS PEANUT 59G X24P X8	1.00	PKT	0.0000	0.00	0.00	0.00	0.00
3		D002425	SNICKERS ALMOND 50G X24PK X8	1.00	PKT	0.0000	0.00	0.00	0.00	0.00

[Confirm](#) [Cancel](#)

4. No. of items to choose – Choose 1
5. Then, click Confirm button

Validation

Validation by: Qty

Min Qty: 10

[Save](#) [Close](#)

Promotion Lines

[Group](#) | [Ungroup](#) | [Delete](#) | [Create](#)

Total 3 results.

#	Grouping	Item	Description	Qty	UOM	Price / UOM	Discount	
☐		D000023	M&M'S PEANUT 200GM X 24PKT	0.00	CTN	161.2800	N/A	
☐	2VK / 1	D002333	SNICKERS PEANUT 59G X24P X8	1.00	PKT	0.0000	N/A	
☐	2VK / 1	D002425	SNICKERS ALMOND 50G X24PK X8	1.00	PKT	0.0000	N/A	

6. The items confirmed being grouped will be displayed in Green tagging.

Example 2:

- Buy 10 cartons Item A
- FOC 2 pack choose from Item B or Item C
- To enable the flexibility to choose 2 FOC items from Item B or Item C (meaning 2 choose 2)
 - (KLG Corn Flakes 150gm x 1 Box) + (KLG Rice Krispies 130gm x 1 Box); or
 - KLG Corn Flakes 150gm x 2 Boxes; or
 - KLG Rice Krispies 130gm x 2 Boxes

Promotion Lines

[Group](#) | [Ungroup](#)

Displaying 1-3 of 3 results.

#	Grouping	Item	Description	Qty	UOM	Price / UOM	Discount	
1		D005268	KLG FROSTIES 300GM X 18BOX	0.00	CTN	121.3200	N/A	
2		D005265	KLG CORN FLAKES 150GMX18BOX	1.00	BOX	0.0000	N/A	
3		D005271	KLG RICE KRISPIES 130GMX18BOX	1.00	BOX	3.2600	N/A	

1. Tick selection box of both FOC items.
2. Then click Group

Create Promotion Line Grouping [TPgroup2]

Create promotion grouping with the following lines?

Grouping: 9IM

No. of items to choose:

Total 2 results.

#	Grouping	Item	Description	Qty	UOM	Price / UOM	Discount	Disc % 02	Disc % 03	Disc % 04
2		D005265	KLG CORN FLAKES 150GMX18BOX	1.00	BOX	0.0000	0.00	0.00	0.00	0.00
3		D005271	KLG RICE KRISPIES 130GMX18BOX	1.00	BOX	3.2600	0.00	0.00	0.00	0.00

[Confirm](#) [Cancel](#)

3. No. of items to choose – Select Qty of this group – Choose 2
4. Then, click Confirm button

Promotion Lines

[Group](#) | [Ungroup](#) | [Delete](#) | [Create](#)

Total 3 results.

#	Grouping	Item	Description	Qty	UOM	Price / UOM	Discount	
1		D005268	KLG FROSTIES 300GM X 18BOX	0.00	CTN	121.3200	N/A	
2	9IM / 2	D005265	KLG CORN FLAKES 150GMX18BOX	1.00	BOX	0.0000	N/A	
3	9IM / 2	D005271	KLG RICE KRISPIES 130GMX18BOX	1.00	BOX	3.2600	N/A	

5. The items confirmed being grouped will be displayed in Green tagging.

Basket

Example:

- Buy 1 set Basket = 2 cartons Item A + 2 cartons Item B + FOC 1 pack Item C

Create Promotion

General

Type: BASKET

Code: TestBasket1

Description: Buy 2 Ctn Item A + 2 Ctn Item B - FOC 1 Pack Item C

Description 01:

Description 02:

Valid From: 01-06-2014

Valid To: 30-09-2014

Remark:

Is Active: ☒

Validation

Validation by: Qty

Min Qty: 4

Create Cancel

1. Choose Validation by Qty
2. Enter Min Qty 4
3. Create promotion lines

Create Promotion Line [TestBasket1]

Fields with * are required.

General

1

Item: D009205

UOM: CTN

Qty: 2.00

Price / UOM: 380.1600

Description: CLAYPOT BAKUTEH 35GX12X12BOX

Discount: 0.00

Disc % 02: 0.00

Disc % 03: 0.00

Disc % 04: 0.00

Disc Amt: 0.0000

Remark:

Grouping:

CLAYPOT BAKUTEH 35GX12X12BOX

F.O.C. ☐

Tax % 01: 0.00

Tax % 02: 0.00

Tax % 03: 0.00

Tax % 04: 0.00

Create Cancel

4. #1 - Qty – enter 2 CTN. The Basket will fix the Qty for this item as 2 CTN.

Create Promotion Line [TestBasket1]

Fields with * are required.

General

* 2 Grouping

Item * D009208 CLAYPOT CHICKUTEH 40GX12X6BOX

UOM * CTN

Qty 2.00

Price / UOM 224.6400 F.O.C. ☐

Description CLAYPOT CHICKUTEH 40GX12X6BOX

Discount 0.00 Tax % 01 0.00

Disc % 02 0.00 Tax % 02 0.00

Disc % 03 0.00 Tax % 03 0.00

Disc % 04 0.00 Tax % 04 0.00

Disc Amt 0.0000

Remark

Create Cancel

5. # 2 - Qty – enter 2 CTN. The Basket will fix the Qty for this item as 2 CTN.

Create Promotion Line [TestBasket1]

Fields with * are required.

General

* 3 Grouping

Item * D009209 CLAYPOT HERBAL CHICKEN SOUP 40G X 12 X 6BOX

UOM * BOX

Qty 1.00

Price / UOM 0.0000 F.O.C. ☒

Description CLAYPOT HERBAL CHICKEN SOUP 40G X 12 X 6BOX

Discount 0.00 Tax % 01 0.00

Disc % 02 0.00 Tax % 02 0.00

Disc % 03 0.00 Tax % 03 0.00

Disc % 04 0.00 Tax % 04 0.00

Disc Amt 0.0000

Remark

Create Cancel

6. # 3 – create FOC promotion line.

NPD

Example:

- Launched of new product

Create Promotion

General

Type: NPD

Code *: NPD-JUN14-01-SNI

Description: June'14 - New Product - Snickers Almond

Description 01:

Description 02:

Valid From *: 01-06-2014

Valid To *: 31-07-2014

Remark:

Is Active: ☒

Validation

Validation by: Qty

Min Qty: 0

Create **Cancel**

1. Enter Min Qty / Value – set as 0
2. Click create

Create Promotion Line [NPD-JUN14-01-SNI]

Fields with * are required.

General

*: 1

Grouping:

Item *: D002425 SNICKERS ALMOND 50G X24PK X8

UOM *: PKT

Qty: 0.00

Price / UOM: 1.7900

F.O.C.:

Description: SNICKERS ALMOND 50G X24PK X8

Discount: 0.00

Disc % 01: 0.00

Disc % 02: 0.00

Disc % 03: 0.00

Disc % 04: 0.00

Disc Amt: 0.0000

Remark:

Create **Cancel**

3. Create promotion line.
4. Select the new product
5. Then click Create

Flexi Discount

Create Promotion

General

Type: FLEXI DISC ▼

Code *

Description

Description 01

Description 02

Valid From *

Valid To *

Remark

Is Active ☒

Validation

Validation by: Qty ▼

Min Qty:

Create Cancel

1. Choose promotion type – FLEXI DISC.

Example:

- Buy Item A – Discount Maximum 5% + 2%

Create Promotion

General

Type: FLEXI DISC ▼

Code *

Description

Description 01

Description 02

Valid From *

Valid To *

Remark

Is Active ☒

Validation

Validation by: Qty ▼

Min Qty:

Create Cancel

1. Fill in relevant field and click CREATE.

⚙️ Create Promotion Line [FXD-TEST-01]



Fields with * are required.

General

*

1

Grouping

Item *

310102

KOPIKO COFFEE CANDY 12X12X40G STICK PACK

UOM *

CTN

Qty

0.00

Req Qty

0.00

Price / UOM

172.8000

F.O.C.

☐

Description

KOPIKO COFFEE CANDY 12X12X40G STICK PACK

Disc %

5.00

2.00

0.00

0.00

Disc Amt

0.0000

Remark

Create

Cancel

2. Create Item and enter the flexible discount percentage.

Search Promotion

Manage Promotions



Division

ALL

Brand

ALL

Type

ALL

Discount By

Code

Description

Remark

Item

Customer

Customer Channel

Customer Chain

Validity date

Check Valid

21-01-2016

Search

[Download](#) | [Import Excel2007](#) | [Create](#)

Displaying 1-9 of 9 results.

Code	Brand	Description	Remark	Type	Valid From	Valid To	Valid	
300VC	-	PURCHASE MINIMUM RM300 FOC RM10 VOUCHER		V	01-01-2016	31-12-2016	YES	
BRANDSH2	A/DKCIS	BRANDS INNERSHINE 2 FOC 1 BERRY		P	01-06-2015	31-12-2016	YES	

1. Search Promotion by below criterias:

- Division
- Brand – product brand (category level 0)
- Type – promotion type
- Discount by – promotion is discount by item brand/item category/item agency (category level 0 / level 1 / level 2)
- Code – promotion code
- Description – promotion description
- Remark – promotion remark
- Item – item code or item description
- Customer – customer name
- Customer Channel (category level 2)
- Customer chain (category level 0)
- Validity Date – promotion validity date
- Check Valid – check promo validity status

Upload Promotion

Home | MANAGER1 | Logout

Home System Import/Export Master Customers Vendors Items **Sales & Delivery** Purchasing Inventory Finance

Home » Sales & Delivery » Promotions » Manage

Manage Promotions

Advanced Search

Validity date  

[Import Excel2007](#) [Create](#)

Displaying 1-20 of 61 results.

Code	Description	Type	Valid From	Valid To	Valid	Is Active
DYN-CAN-JUL-01	DYNAMITE CANDY - BUY RM150 FOC 1 PACK NIPS	P	01-07-2014	31-07-2014	YES	N
JC9CHO-GT-F	CLOUD 9 CHOCSTER - BUY 15 CTN FOC 1 CTN	Q	01-06-2014	31-12-2014	YES	Y
JC9CHO-GT-H	CLOUD 9 CHOCSTER - BUY 7.5 CTN FOC 0.5 CTN (HALF SET)	Q	01-06-2014	31-12-2014	YES	Y
JC9CHO-WS-F	CLOUD 9 CHOCSTER - BUY 15 CTN FOC 1 CTN + 4% DISC	Q	01-06-2014	31-12-2014	YES	Y
JC9CHO-WS-H	CLOUD 9 CHOCSTER - BUY 7.5 CTN FOC 0.5 CTN + 4% DISC (HALF SET)	Q	01-06-2014	31-12-2014	YES	Y

1. Click [Import Excel 2007](#) button.

Import From Excel2007

Division

Division Description

Company Name

Export/Import Path

Upload

PROMOTIONS.XLSX No file chosen

Download

Brand

Valid Until 

2. Select brand, valid until
3. Then click Download.

4. Check the downloaded date and time
5. Click on the excel file link to download the excel file.

6. Open the excel file.

PROMOTIONS - Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	DIVISION 1	DIVISION 2	DIVISION 3	DIVISION 4	DIVISION 5	DIVISION 6	DIVISION 7	DIVISION 8	DIVISION 9	DIVISION 10	PROMO CODE	PROMO TYPE	DESCRIPTION	DESCRIPTION 1	DESCRIPTION 2
2	SUN										QD-MIN288-V2 QTY DISC		QTY DISC MIN 288 FOC 48	MIN 312 FOC 56	
3	SUN										QD-MIN288-V2 QTY DISC		QTY DISC MIN 288 FOC 48	MIN 312 FOC 56	
4															
5															
6															
7															
8															
9															
10															
11															
12															
13															
14															
15															
16															
17															
18															
19															
20															
21															
22															
23															

7. Fill up the excel file.

Home MANAGER1 Logout

Home System Import/Export Master Customers Vendors Items Sales & Delivery Purchasing Inventory Finance

Home » Sales & Delivery » Promotions » Import From Excel2007

Import From Excel2007

Division

Division: URC Description: URC SNACK FOODS (MAI

Company Name: SHH ENTERPRISE SDN BHD

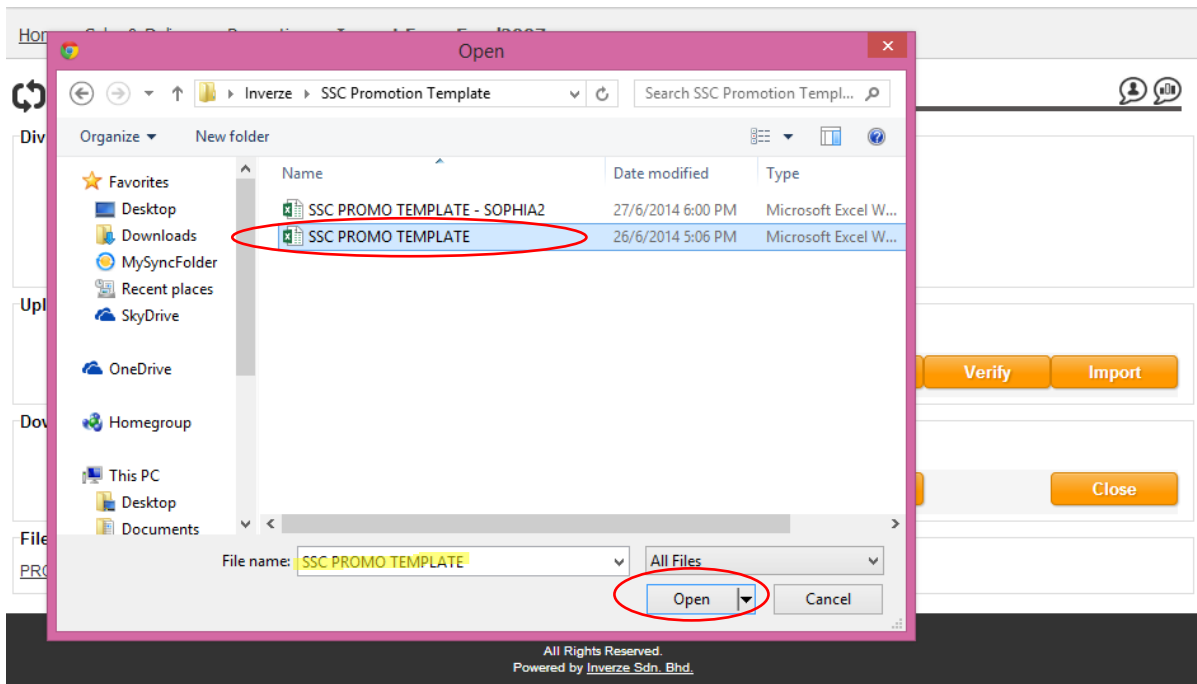
Export/Import Path: /var/www/urc

Upload

PROMOTIONS.XLSX Choose File No file chosen

Upload Verify Import

8. Click Choose File.



9. Select the file that you wish to upload.

10. Click Open.

Import From Excel2007

Division: 1-URC, Description: URC SNACK FOODS (MALA), Company Name: SHH ENTERPRISE SDN BHD, Export/Import Path: /var/www/urc

Upload
PROMOTIONS.XLSX [Choose File] No file chosen

Download
Valid From: 01-02-2015 to 28-02-2015

Files
PROMOTIONS.XLSX 38,400 bytes 2015-01-28 19:08:10

Buttons: Upload (11), Verify (13), Import, Download, Close

11. Click Upload.

12. You will see the date and time showing the current upload time.

13. Once the file uploaded, click Verify to check for the file problem.

Home	System	Import/Export	Master	Customers	Vendors	Items	Sales & Delivery	Purchasing	Inventory
Finance									

Home » Sales & Delivery » Promotions » Import From Excel2007

- JCH015-WS-F: This promotion is going to update
- JCH015-WS-H/01: This promotion is going to update
- JCH015-WS-H/02: This promotion is going to update
- JCH015-GT-F: This promotion is going to update
- JCH015-GT-H/01: This promotion is going to update
- JCH015-GT-H/02: This promotion is going to update
- JCH045-WS-F: This promotion is going to update
- JCH045-WS-H/01: This promotion is going to update
- JCH045-WS-H/02: This promotion is going to update
- JCH045-WS-H/03: This promotion is going to update
- JCH060-WS-F: This promotion is going to update
- JCH060-WS-H/01: This promotion is going to update
- JCH060-WS-H/02: This promotion is going to update
- JCH060-WS-H/03: This promotion is going to update
- JCH060-WS-H/04: This promotion is going to update
- JCH060-WS-H/05: This promotion is going to update
- JCH060-GT-F: This promotion is going to update
- JCH060-GT-H/01: This promotion is going to update
- JCH060-GT-H/02: This promotion is going to update
- JCH060-GT-H/03: This promotion is going to update
- JCH060-GT-H/04: This promotion is going to update
- JCH060-GT-H/05: This promotion is going to update
- JC9CHO-WS-F: This promotion is going to update
- JC9CHO-WS-H: This promotion is going to update
- JC9CHO-GT-F: This promotion is going to update
- JC9CHO-GT-H: This promotion is going to update
- JCR160-WS-F: This promotion is going to update
- JCR160-WS-H/01: This promotion is going to update
- JCR160-WS-H/02: This promotion is going to update
- JCR160-WS-H/03: This promotion is going to update
- JCR160-WS-H/04: This promotion is going to update
- JCR160-WS-H/05: This promotion is going to update
- JCR160-GT-F: This promotion is going to update
- JCR160-GT-H/01: This promotion is going to update
- JCR160-GT-H/02: This promotion is going to update
- JCR160-GT-H/03: This promotion is going to update
- JCR160-GT-H/04: This promotion is going to update
- JCR160-GT-H/05: This promotion is going to update
- JNJDRC-WS-B/01: This promotion is going to update
- JNJDRC-WS-B/02: This promotion is going to update
- JNJDRC-WS-BAS/01: This promotion is going to update
- JNJDRC-WS-BAS/02: This promotion is going to update
- JCR160-GT-H-NEW/01: This promotion is going to update

Import From Excel2007

14. A message will show the promotion code is going to update.

Home										MANAGER1	Logout
Home	System	Import/Export	Master	Customers	Vendors	Items	Sales & Delivery	Purchasing	Inventory	Finance	

Home » Sales & Delivery » Promotions » Import From Excel2007

- PROMOTIONS.XLSX [DISCOUNT 2(%): field not found
- PROMOTIONS.XLSX [DISCOUNT 3(%): field not found
- PROMOTIONS.XLSX [DISCOUNT 4(%): field not found

Import From Excel2007

15. If there are problems found, you need to amend on the Ms Excel and upload for verify again.

- JCR160-GT-H/04: This promotion is going to update
- JCR160-GT-H/05: This promotion is going to update
- JNJDRS-WS-B/01: This promotion is going to update
- JNJDRS-WS-B/02: This promotion is going to update
- JNJDRS-WS-BAS/01: This promotion is going to update
- JNJDRS-WS-BAS/02: This promotion is going to update
- JCR160-GT-H-NEW/01: This promotion is going to update

Import From Excel2007

Division

Division: Description:

Company Name:

Export/Import Path:

Upload

PROMOTIONS.XLSX No file chosen

16. Once verification done, click Import.

Home » Sales & Delivery » Promotions » Import From Excel2007

Import From Excel2007

Message:

- PROMOTION [JCH015-WS-F]: record update
- PROMOTION [JCH015-WS-H/01]: record update
- PROMOTION [JCH015-WS-H/02]: record update
- PROMOTION [JCH015-GT-F]: record update
- PROMOTION [JCH015-GT-H/01]: record update
- PROMOTION [JCH015-GT-H/02]: record update
- PROMOTION [JCH045-WS-F]: record update
- PROMOTION [JCH045-WS-H/01]: record update
- PROMOTION [JCH045-WS-H/02]: record update
- PROMOTION [JCH045-WS-H/03]: record update
- PROMOTION [JCH060-WS-F]: record update
- PROMOTION [JCH060-WS-H/01]: record update
- PROMOTION [JCH060-WS-H/02]: record update
- PROMOTION [JCH060-WS-H/03]: record update
- PROMOTION [JCH060-WS-H/04]: record update
- PROMOTION [JCH060-WS-H/05]: record update

17. A message will show the promotion code record updated.

Import From Excel2007

Division

Division: Description:

Company Name:

Export/Import Path:

Upload

PROMOTIONS.XLSX No file chosen

Download

Date From: to

18. Once Import done, click Close.

Manage Promotions



Advanced Search

Validity date

Search

[Import Excel2007](#) | [Create](#)

Displaying 1-20 of 61 results.

Code	Description	Type	Valid From	Valid To	Valid	Is Active	
DYN-CAN-JUL-01	DYNAMITE CANDY - BUY RM150 FOC 1 PACK NIPS	P	01-07-2014	31-07-2014	YES	N	
JC9CHO-GT-F	CLOUD 9 CHOCSTER - BUY 15 CTN FOC 1 CTN	Q	01-06-2014	31-12-2014	YES	Y	
JC9CHO-GT-H	CLOUD 9 CHOCSTER - BUY 7.5 CTN FOC 0.5 CTN (HALF SET)	Q	01-06-2014	31-12-2014	YES	Y	
JC9CHO-WS-F	CLOUD 9 CHOCSTER - BUY 15 CTN FOC 1 CTN + 4% DISC	Q	01-06-2014	31-12-2014	YES	Y	
JC9CHO-WS-H	CLOUD 9 CHOCSTER - BUY 7.5 CTN FOC 0.5 CTN + 4% DISC (HALF SET)	Q	01-06-2014	31-12-2014	YES	Y	
JCH015-GT-F	JNJ POTATO CHIPS - BUY 15 CTN FOC 1 CTN	Q	01-06-2014	31-12-2014	YES	Y	
JCH015-GT-H/01	JNJ POTATO CHIPS - BUY 7.5 CTN FOC 0.5 CTN (HALF SET)	Q	01-06-2014	31-12-2014	YES	Y	
JCH015-GT-H/02	JNJ POTATO CHIPS - BUY 7.5 CTN FOC 0.5 CTN (HALF SET)	Q	01-06-2014	31-12-2014	YES	Y	
JCH015-WS-F	JNJ POTATO CHIPS - BUY 15 CTN FOC 1 CTN + 8% DISC	Q	01-06-2014	31-12-2014	YES	Y	
JCH015-WS-H/01	JNJ POTATO CHIPS - BUY 7.5 CTN FOC 0.5 CTN + 8% DISC	Q	01-06-2014	31-12-2014	YES	Y	
JCH015-WS-H/02	JNJ POTATO CHIPS - BUY 7.5 CTN FOC 0.5 CTN + 8% DISC	Q	01-06-2014	31-12-2014	YES	Y	
JCH045-WS-F	JNJ POTATO CHIPS - BUY 15 CTN FOC 1 CTN + 8% DISC	Q	01-06-2014	31-12-2014	YES	Y	
JCH045-WS-H/01	JNJ POTATO CHIPS - BUY 7.5 CTN FOC 0.5 CTN + 8% DISC	Q	01-06-2014	31-12-2014	YES	Y	

19. You will see the promotion code imported.

20. Click on the pencil if you wish to edit or update the promotion.

Download Promotion

Manage Promotions

Division: ALL
 item_group_short: ALL
 Type: ALL
 Discount By:
 Code:
 Description:
 Remark:
 Item:
 Customer:
 customer_category_02:
 customer_category:
 Validity date: 27-02-2015

[Download](#) | [Import Excel2007](#) | [Create](#)

Displaying 1-2 of 2 results.

Code	item_group_short	Description	Remark	Type	Valid From	Valid To	Valid
LYCHEE425G	CANNED	LTS AAA LYCHEE 425GM - FIXED DISCOUNT (6%+2%) MINIMUM 24 UNITS FOR WHOLESALER		P	01-02-2015	31-03-2015	YES
NTC-LYCHEE	OTHERS	AAA010234 - AAA NATA DE COCO-LYCHEE		M	01-02-2015	30-06-2015	YES

1. Fill in the search criteria to view promotion.

Manage Promotions

Division: ALL
 item_group_short: ALL
 Type: ALL
 Discount By:
 Code:
 Description:
 Remark:
 Item:
 Customer:
 customer_category_02:
 customer_category:
 Validity date: 27-02-2015

[Download](#) | [Import Excel2007](#) | [Create](#)

Displaying 1-2 of 2 results.

Code	item_group_short	Description	Remark	Type	Valid From	Valid To	Valid
LYCHEE425G	CANNED	LTS AAA LYCHEE 425GM - FIXED DISCOUNT (6%+2%) MINIMUM 24 UNITS FOR WHOLESALER		P	01-02-2015	31-03-2015	YES
NTC-LYCHEE	OTHERS	AAA010234 - AAA NATA DE COCO-LYCHEE		M	01-02-2015	30-06-2015	YES

2. Click Download.

Manage Promotions



Division
 item_group_short
 Type
 Discount By
 Code
 Description
 Remark
 Item
 Customer
 customer_category_02
 customer_category
 Validity date

[Search](#)

[Download](#) | [Import Excel2007](#) | [Create](#)

Displaying 1-2 of 2 results.

Code	item_group_short	Description	Remark	Type	Valid From	Valid To	Valid
LYCHEE425G	CANNED	LTS AAA LYCHEE 425GM - FIXED DISCOUNT (6%+2%) MINIMUM 24 UNITS FOR WHOLESALER		P	01-02-2015	31-03-2015	YES
NTC-LYCHEE	OTHERS	AAA010234 - AAA NATA DE COCO-LYCHEE		M	01-02-2015	30-06-2015	YES

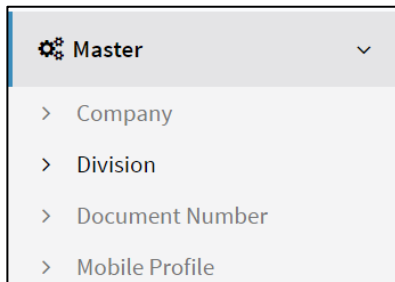
Copyright © 2015 by SSP v1.0.0



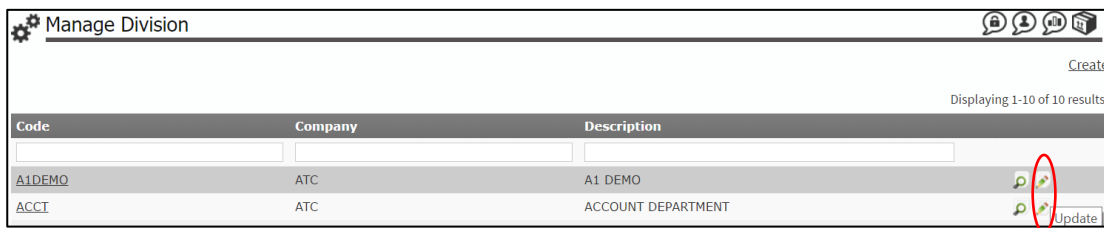
PromotionListing_20....xlsx

3. An excel file will be downloaded.

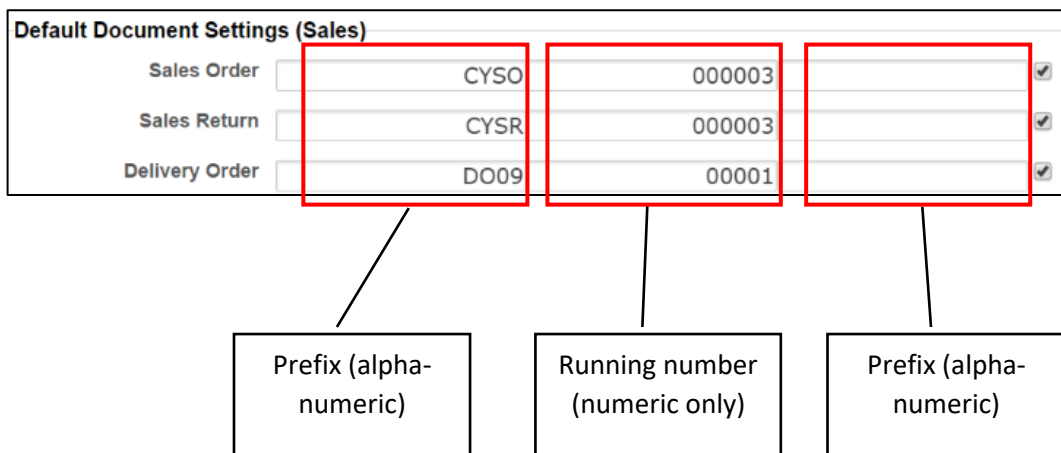
DOCUMENT NUMBER RESET BY MONTH OR YEAR



1. Go to Master > Division



2. Choose the division, and click on the pencil to UPDATE.



****Document number is limit to 30 characters in total****

****Please check with your accounting system about the document number limit else setting too long will not be able to post the document to accounting system.**

3. Each document number can set alpha-numeric prefix at the front and back of the document number.
For example:

Sales Order	PG-	000003	-A01	☒
-------------	-----	--------	------	-------------------------------------

Result:

PG-00001-A01

PG-00002-A01

PG-00003-A01

PG-00004-A01.....

4. To set the prefix reset by Month or Year
 - Set the month format or year format
 - Example date = February 2017
 - {yy} = 17
 - {yyyy} = 2017
 - {m} = 02
 - {mm} = FEB

Sales Order ☒ 

5. Once you set the month or year format in the prefix box, a calendar icon  will appear at the back.

Sales Order

January Next Number	00001	July Next Number	00001
February Next Number	00001	August Next Number	00001
March Next Number	00001	September Next Number	00001
April Next Number	00001	October Next Number	00001
May Next Number	00001	November Next Number	00001
Jun Next Number	00001	December Next Number	00001

6. Click the calendar box, you can set the running number (numeric only) for each month.

Case Scenario: Current Date is January 2017

Example 1:

PG{yy}{m}	001	-A01
-----------	-----	------

Result:

PG1701001-A01

PG1701002-A01.....

Example 2:

{yy}{m}PG-	00003	-A01
------------	-------	------

Result:

1701PG-00003-A01

1701PG-00004-A01.....

Example 3:

PG{yyyy}-	000002	-A01-{mm}
-----------	--------	-----------

Result:

PG2017-000002-A01-JAN

PG2017-000003-A01-JAN.....

Example 4:

{yyyy}{m}-	10	-PG-A01
------------	----	---------

Result:

201701-10-PG-A01

201701-11-PG-A01.....