

HOW TO USE THE SYSTEM?

STAFF

Account Access and Sign-Up

To gain access or sign up for an account, staff members must contact the admin in charge of the system. The admin will create a new account for the user.

Login

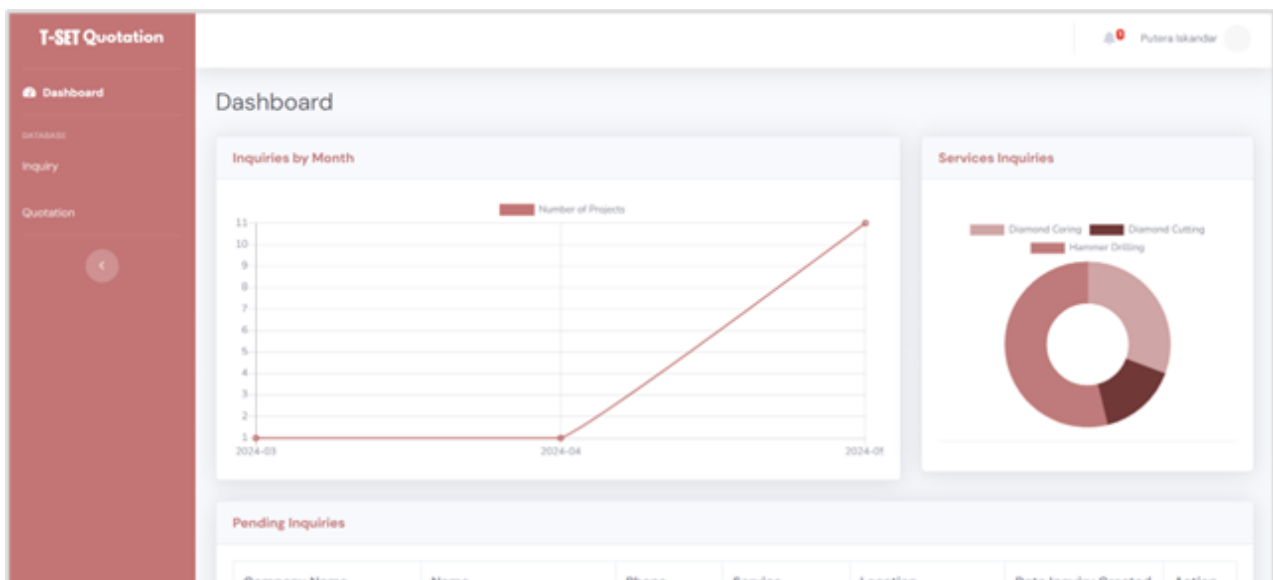
Go to the Login Page: Navigate to the login page.

Enter Credentials: Fill in your email and password and press "Sign In".

The screenshot shows the T-SET Quotation system interface. At the top left is the 'T-SET Quotation' logo, and at the top right are links for 'Home', 'Policy', and 'How To'. The main content area features a large heading 'Quote at its Finest.' with 'Finest.' in a red box. Below this is the text 'View Inquiries and Quote in Seconds.' To the right is a login form with a red background. The form has two input fields: 'Email address' with the value 'putera16' and 'Password' with masked characters. A 'Sign In' button is located at the bottom of the form. The background of the page is white with faint red square outlines.

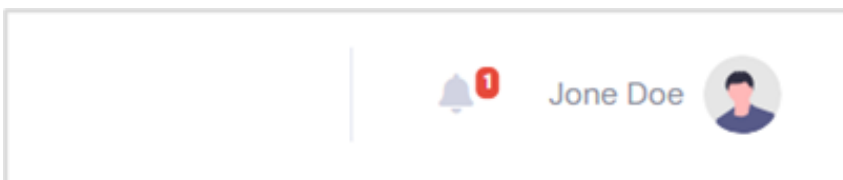
Dashboard

Once logged in, you will be directed to the dashboard page, which displays various data visualizations about inquiries and quotations. Here, staff can also view users with pending statuses to identify which inquiries need to be contacted.



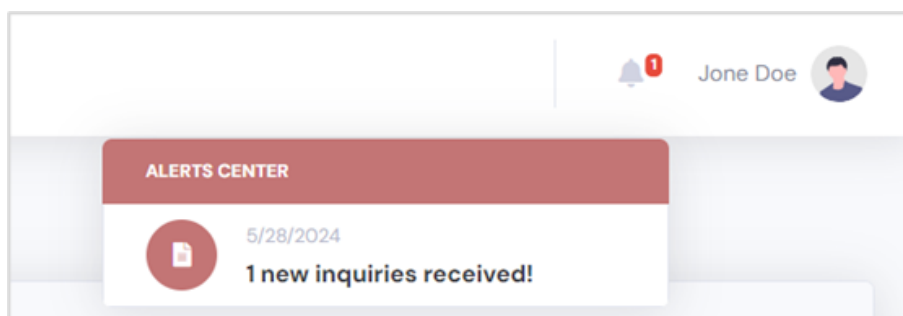
New Inquiry Alerts

If a new inquiry has been added and hasn't been viewed by anyone, the system will display a badge with the number of new inquiries and show an alert.



Access New Inquiries

Click on the alert to be directed to the inquiries page. Here, you can view a list of inquiries and identify which ones are new and haven't been viewed by checking the status column. The table is sorted from newest to oldest inquiries.



Inquiries							
Inquiry List							
Show 10 entries				Search:			
Company Name	Contact Person Name	Contact Person Phone	Work Location	Service Type	Date Created	Status	Action
Jane Sdn Bhd	Jane Doe	0183644785	Seri Kembangan, Selangor	Hammer Drilling	28-05-2024 15:37:24	Newly Added	View

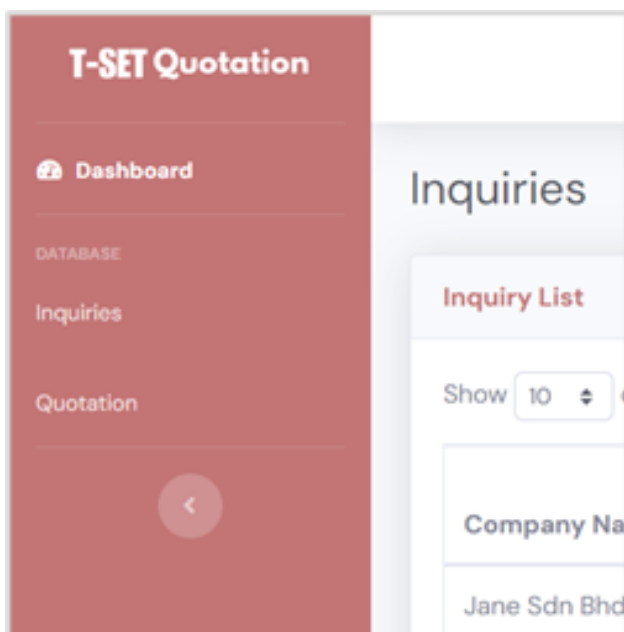
Searching Inquiries

Search Bar: Use the search bar at the top right of the table to search for specific inquiries.



Viewing Inquiries

Inquiries Tab: Click the "Inquiries" tab on the left sidebar to go to the inquiries list.



Inquiry List: All inquiries will be listed in rows.

The screenshot shows the T-SET Quotation application interface with the 'Inquiry List' table displayed. The table has 9 columns: Company Name, Contact Person Name, Contact Person Phone, Work Location, Service Type, Date Created, Status, and Action. The table contains 5 rows of data. The status of each inquiry is indicated by a colored label: 'Newly Added' (blue), 'Pending' (yellow), and 'Contacted' (grey). Each row has a 'View' button in the Action column.

Company Name	Contact Person Name	Contact Person Phone	Work Location	Service Type	Date Created	Status	Action
Jane Sdn Bhd	Jane Doe	0183644785	Seri Kembangan, Selangor	Hammer Drilling	28-05-2024 15:37:24	Newly Added	View
UTM Perlis	Putera Iskandar bin A Khalid	0172369793	Klang, Selangor	Hammer Drilling	27-05-2024 15:38:42	Pending	View
asd	adad	asdad	dada	Diamond Cutting	27-05-2024 14:58:22	Contacted	View
UTM Perlis	Putera Iskandar bin A Khalid	0172369793	sadsa	Hammer Drilling	27-05-2024 14:48:48	Pending	View
UTM Perlis	Putera Iskandar bin A Khalid	0172369793	sadsa	Diamond Coring	27-05-2024 12:28:20	Pending	View

View Details: To view an inquiry, click the "View" button at the right end of the desired inquiry's row. This will take you to a specific inquiry page displaying all the details.

The screenshot shows the 'T-SET Quotation' interface. On the left is a sidebar with 'Dashboard', 'Inquiries', and 'Quotation' options. The main content area is titled 'Inquiry Details' and includes buttons for 'Edit Inquiry' and 'Proceed to Quotation'. Below the title, it states 'Below are the details for the inquiry selected.' The details are organized into two sections: 'Project Status' showing 'Pending' and 'Company Information' showing 'Company Name: Jane Sdn Bhd' and 'Company Address: Seri Kembangan, Selangor'.

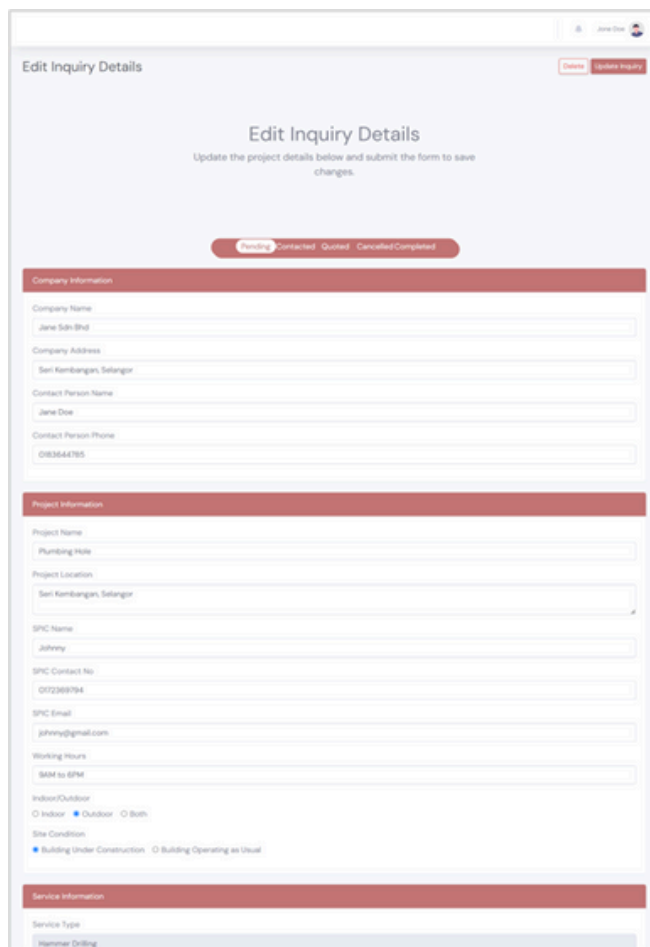
Edit Inquiries

From the inquiries list page, select the desired inquiry and click the "View" button in its row.

This screenshot is identical to the one above, showing the 'T-SET Quotation' interface with the 'Inquiry Details' page. It displays the 'Project Status' as 'Pending' and 'Company Information' for 'Jane Sdn Bhd' at 'Seri Kembangan, Selangor'.



Click the gray "Edit" button located in the top right corner of the page. This will take you to the edit page.



Edit Inquiry Details

Update the project details below and submit the form to save changes.

Status: Pending | Contacted | Quoted | Cancelled | Completed

Company Information

Company Name: Jane Sdn Bhd

Company Address: Seri Kembangan, Selangor

Contact Person Name: Jane Doe

Contact Person Phone: 083644785

Project Information

Project Name: Plumbing Hole

Project Location: Seri Kembangan, Selangor

SPC Name: Johnny

SPC Contact No: 012269794

SPC Email: johnny@gmail.com

Working Hours: 8AM to 6PM

Indoor/Outdoor: ☒ Indoor ☐ Outdoor ☐ Both

Site Condition: ☒ Building Under Construction ☐ Building Operating as Usual

Service Information

Service Type: Hammer Drilling

Here, users can change the status and details of the inquiry. After making the changes, press the "Update Inquiry" button at the top right corner of the page. The details will then be saved and updated in the database.



Status

Here is the section where attention is required. Below, I have listed all status options and their details, indicating which ones are automated and which require the user to manually change the status.

Newly Added	The system will automatically set new incoming inquiries to 'Newly Added'.	Auto
Pending	The system will change the inquiries to 'Pending' when any staff member views the inquiries.	Auto
Contacted	This status needs to be set manually when staff have contacted the clients/customers to confirm inquiry details.	Manual
Quoted	After confirming the details with clients/customers, staff will create a quotation. Once the quotation is completed, the system will automatically change the status	Auto
Completed	After the customer agrees with the quotation, the staff need to change the status to 'Completed' manually.	Manual
Cancelled	Marking an inquiry as 'Cancelled' indicates that the client has rejected the quotation or decided not to proceed. This status helps in maintaining accurate records of outcomes and allows for better analysis of conversion rates and client feedback.	Manual



Delete Inquiries

Users can also delete inquiries through the edit page. The button to delete a specific inquiry is also located on the edit page.

Generate Quotation

From the inquiry list page, select the desired inquiry by clicking on it. After that, click the "Proceed to Quotation" button at the top right of the page.

The page will then direct the user to a quotation form where the user needs to insert the service price, discount, tax, and other optional addons.

The screenshot shows the 'Generate Quotation' page in the T-SET Quotation system. On the left is a red sidebar with navigation links: Dashboard, DATABASE, Inquiries, and Quotation. The main content area is titled 'Generate Quotation' and contains a 'Quotation Form'. The form fields are as follows:

Contact Person Name	Putera Iskandar bin A Khalid
Company Name	Testing Sdn Bhd
Company Address	No 19 Leboh Bagor Taman Petaling Indah 41200 Klang
Contact Phone	0172369793
Service Type	Hammer Drilling
Service Price (RM)	
Service Discount (RM)	
Tax Percentage (%)	
Notes	

Below the form is an 'Add-ons' section with a table:

Add-on Name	Quantity	Discount (RM)	Price	Action
Add Add-on Generate Quotation				

At the bottom of the form area, there is a small note: 'Please allow and enable pop-up for your browser'. The footer of the page includes the copyright notice 'Copyright T-SET(M) Sdn Bhd © DB Infinite 2024' and a small upward arrow icon.

After submitting, the quotation will be saved in the database and can be viewed on the quotation page. The status of the user inquiry will be changed to "Quoted."



Download Quotation

To download the generated quotation, the user needs to go to the Quotation list page. Navigate to the row of the quotation the user wants to download and press the download button at the right end of the row. Then, the user will be shown the quotation file in PDF format, where they can either download or print the file.

T-SET Quotation

Dashboard

DATABASE

Inquiries

Quotation

Putera Iskandar

Quotations

Quotation List

Show 10 entries Search:

Quote ID	Date	Company Name	Price After Tax	Action	Download
61	2024-06-06 14:51	IJM Sdn Bhd	86.4	Delete View Inquiry	Download
62	2024-06-06 15:06	Bina Jaya Sdn Bhd	4282.2	Delete View Inquiry	Download

Showing 1 to 2 of 2 entries

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