ProLine

"The Fastest Way to Computerize Your Office"

Integrated Business Operations and Intelligence Software designed to increase productivity, efficiency and higher bottom-line.

Benefits

- Easier management by consolidating and Integrating information for contacts, pricing, business transactions and more.
- Simplify the way everyone works in the office.
- Empower staff to be efficient in increasing sales, improving customer satisfaction and reducing costs.
- Monitor operations remotely.
- Take advantage on operations best practices accumulated over the years.
- Templates that you can set up and have it running in just minutes.
- Secure company databases - the most important asset of them all.
- Keep track on what staff does and know exactly what they are doing.
- Develop scorecard for servicing teams to self-monitor problems that can be prevented.

SYSTEM stands for:

"Save Your Self Time, Energy and Money"

Address Book Add and manage contacts from Prospects to Customers, Dealers, Suppliers, Sales, Staff, Technicians and any other contacts both company and individuals.

With the right setup, contacts can be isolated within groups and only accessed by authorized members.

To-Do Notes Create your own tasks, notes and reminders. Assign or share it with your colleagues so nothing get missed out.

Billing Create cash sales or invoices directly or copied from quotation. With a click, links to Inventory to allow stocks to be added / deducted without additional entries.

Billing Templates allow flexible definition of double entries in GL and automated billing. Generate professional looking statements for your customers and creditors alike for faster payments.

Quotation Create standard quotations to be emailed, exported and printed out. Standardized the pricing for your products and services and define customer-specific pricing when required. Reduce pricing errors especially during quotations and billing work.

Expenses Keep track of all expenses within ProLine and easily issue Payment Vouchers.

Flexible Receipting Issue Official Receipt to your customers and support for partial and over payments.

Order Management Tracks and manage complex business arrangements that have schedules involved such as projects, subscriptions, contractual services and more.

It allows tracking of what you need to deliver and its delivery progress to allow instant project costing and progressive claims / billing.

Automatically reminds you and your customers on renewals due. Expiring Orders are extracted to Renewal, which acts similarly to a quotation for further processing.

ProLine

Software Updates

ProLine includes Automatic Updater to keep your software evergreen and healthy.

Auto-Backup

Automatically performs daily backup to an external storage. Backups complete files including the E-Filing and Databases in one simple automated package to enable fast recovery within hours.

Focused on Productivity

Optimized for productivity in daily operations.

ProLine comes with Handy Print - A simple utility integrated into ProLine to allow printing of cheques, barcode, envelopes and letterhead.

Internet Ready

Deploy ProLine with networking to enable efficient workplace with simultaneous multi-computer access. ProLine can be upgraded from Standalone to Network within minutes for easy scalability.

Purchasing Issue Purchase Orders to your suppliers with reference to historical purchases and pricing. Convert the Purchase Orders to Supplier Invoices for payments all with one click.

Servicing + Timesheet Issue Service Forms, Work Orders or Job Sheets for both in-house or on-site work to capture time spent for each staff.

Also streamlining the ability to capture progressive deliveries and customer's asset status and meter calculations.

E-Filing An elegant and easy way to organize documents, scanned pictures and other files within ProLine for easy management and retrieval.

Files are attached to related records such as Contacts, Orders, Billings and Cashbook entries.

Inventory Manage stock, equipments and more by keeping track of balances and costing for each item. The inventory control blends seamlessly into the billing module to allow streamlined tracking with less work.

Define templates for Stock production called BOMs and keep track of Work-In-Progress (WIP) easily by using Production Orders.

Accounting Standard double entry General Ledgers to allow easy adjustments and figure balancing. Each Contact, GL and Stock account have its own Ledger listing report as for detailed drill-down.

Account Reconciliation provides assistance to quickly match account ledger with external statements such as Bank Statements to generate reports for outstanding items.

Multi-User Create multiple logins and passwords with different access rights to improve control over the database without sacrificing access to information that empowers your staff to get the work done.

Workflow Easily track your transaction life-cycle with full audit trails. Define your own workflows and steps to capture and monitor all activities in minutes.

Security & Audit Considerations

Audit Trail

On	User	Action
29/01/2010 5:18 PM	admin	INV created: INVYYMM0007
29/01/2010 5:01 PM	admin	BCRT created: T/YYMM/006-R
29/01/2010 4:28 PM	admin	System settings updated.
28/01/2010 6:40 PM	admin	G301 created: PLYY00005
28/01/2010 1:08 PM	admin	SINV created: T-YYMM0004
27/12/2009 11:46 PM	admin	POS created: POS09120002
27/12/2009 11:45 PM	admin	STN created: STN09120002
27/12/2009 11:27 PM	admin	POS created: POS09120001
27/12/2009 5:57 PM	admin	INV created: INV09120002
27/12/2009 11:02 AM	admin	System settings updated.
24/12/2009 4:37 PM	admin	REC created: REC09120001
24/12/2009 2:25 PM	admin	SINV created: SINV-09090001
24/12/2009 12:48 PM	admin	STN created: STN09120001
19/12/2009 4:39 PM	admin	QCRT created: QCRT/0912/001-0
17/12/2009 4:00 PM	admin	CSN created: CSN-09120002
17/12/2009 4:00 PM	admin	G301 created: PL0900012
15/12/2009 6:27 PM	admin	G303 created: PL0900011
15/12/2009 6:26 PM	admin	G303 created: PL0900010

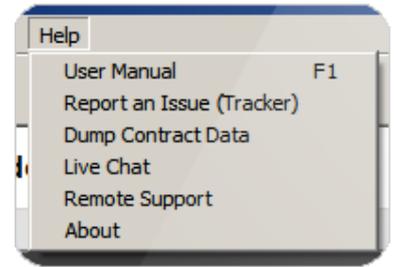Document based security enable finer control on who can perform specific tasks by document.

Access Rights	Accounts Managers	Sales Managers	Admin Assistants	Schedulers	Technicians	Salespersons
Cash Sales						
Create New (Own OG)	☐	☐	☐	☐	☐	☐
Create New (Any OG)	☐	☐	☐	☐	☐	☐
View Record (Own OG)	☐	☐	☐	☐	☐	☐
View Record (Any OG)	☐	☐	☐	☐	☐	☐
Post or Close Record	☐	☐	☐	☐	☐	☐
Cancel (Own OG)	☐	☐	☐	☐	☐	☐
Cancel (Any OG)	☐	☐	☐	☐	☐	☐
Adjust Record	☐	☐	☐	☐	☐	☐
Edit Posted Record	☐	☐	☐	☐	☐	☐
Edit Non-Accounting Info	☐	☐	☐	☐	☐	☐
Back Dating of Record	☐	☐	☐	☐	☐	☐
Update Record	☐	☐	☐	☐	☐	☐
Unpost from Accounts	☐	☐	☐	☐	☐	☐
Print Document	☐	☐	☐	☐	☐	☐
Reprint Document	☐	☐	☐	☐	☐	☐
Generate Reports	☐	☐	☐	☐	☐	☐
Export Reports	☐	☐	☐	☐	☐	☐

Robust multi-level access with Organization Groupings allow separation of database to branches, sales units and more. It mimics the structure of your company's.

ProLine

Product Support

Web based support and same day response during office hours. Chat with us online at our website, submit your issues to our web tracking system.

Less traveling and wait time. We implement and support your software via Internet dial-in anytime. All our remote sessions are video-recorded and kept for 3 months. Secured, transparent and no extra cost on your side. All it takes is a click away.

Help	
User Manual	F1
Report an Issue (Tracker)	
Dump Contract Data	
Live Chat	
Remote Support	
About	

ProLine supports for almost all operations that relates to Customers.

The Customer Experience Management
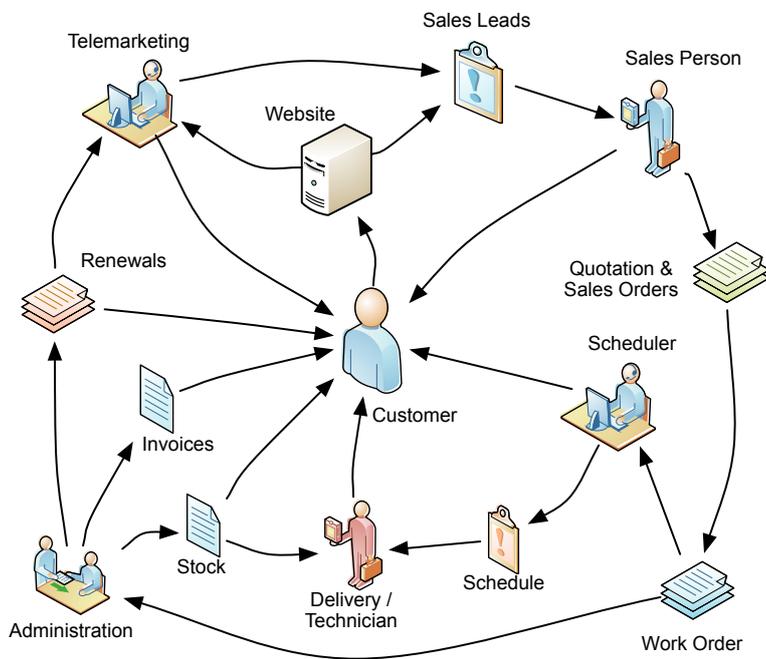
Notes

1. **Telemarketing**
   Incoming enquiries & Calls
   Assign Sales Leads to multiple SalesPerson
   Referrals

2. **Quotation**
   In office and on-the-field quotation printing
   Confirmed contracts converted to Job / Contract

3. **Service Schedules**
   Auto generated service dates
   Keep tracks of due and missed services
   Scheduler can override appointments

4. **Servicing Technician**
   Keep track of vehicle mileage per job
   Print job sheets with service details

5. **Billing**
   Progressive Invoicing on Contract level
   Invoice per job done
   Receipts matching to Invoices
   Monthly Statement and Ageing Reports

Master References:

Organization Groups, Chart of Accounts, Holidays, Users, User Roles, Workflow Queues, Workflow Status
Contacts, Categories, Marketing Campaign, Salutation, Occupation, Marital Status, Industry, Nature of Business, Contact Grading
Service Teams, Skill Sets, Targets, Target Status, Service Nature, Work Type, Actions, Areas, Premise Type, Zone, Route
Order Types, Delivery Method, Shipping Method, Payment Method, Payment Mode, Payment Terms
Items, Item Classifications, UOM, Product Brands, Price List, Billing Templates, Bill of Materials (BOM) Templates

Customizable Business Documents:

Quotation, Quick Quote, Cash Sales, Invoice, Purchase Order, Supplier Invoice, Expense Note, Commission Claim, Production Order, Process Out, Process In, Debit Note, Credit Note, Service Form, Renewal, Sales Order, Receipt, Payment Voucher, Trade Journal, General Journal, Production Note, Stock Found, Stock Lost, Consignment In, Consignment Out, Delivery Order, Return Order, Process In, Process Out, Goods Receive, Goods Reject, Rental In, Rental Out, Warranty, Over Counter, Service Recover, Service Dispense.

ProLine

Implementation Specifications

Standard Deliverables

1. ClearMind Tracker - Web Issue Tracking System
2. System & Project Consultation
3. ProLine All-In-One Software
    a. Software Licenses (as per order)
    b. ProLine Remote Implementation (3 days)
4. ProLine Manuals (1 copy with CD soft-copy)
5. Supporting Implementation Notes
6. Walkthrough Guides for Beginners and Testing
7. System Support & Updates Subscription (SSUS)

Note: ClearMind Tracker is our web based system that we use to manage projects and support requests with our clients. Authorized staff can login to submit issues and receive replies from our team as well as view related reports on the progress.

System Support & Updates Subscription (SSUS)

SSUS Entitlements:

1. Bug fixes and new features update
2. Evergreen software upgrades
3. Remote support
4. Online tutoring
5. Wish list submission

Annual maintenance program designed to reduce Total Cost of Ownership (TCO) after the initial system implementation. This program will maintain system health, support users and ensure continuity of system to keep up with ever-changing technologies and business trends.

What's Included in Remote Implementation

- Software installation for Server and User PCs
- Setting Up Databases, Parameters, Security and Backups
- Configuration on automations
- Adjusting printed forms and company letterheads
- Data migration
- Remote Training

Security During Implementation

By request, we provide you with a signed of NDA to ensure all your existing data is only used for migration purposes.

As for passwords, ProLine will be setup with default passwords. Once the initial implementation is completed, we will provide you on further instructions to change the necessary passwords to harden the security.

Notes on Standard Package Remote Implementation

1. Standard package comes with 3 days remote implementation option. For additional work, separate quote will be provided upon request.
2. Datum uses industry standard Remote Control technologies to provide remote services such as implementation and support.
3. The Remote Control software enable our support team to access and control your computer via the Internet without the need to travel to your office.
4. The access is based on per session request, meaning that each time we need to access to your computer, we will need to inform your staff to activate the software for us.
5. There will be no access without consent from your side.
6. Additionally, we prohibit our staff to copy data from your server, unless necessary, with supporting Non-Disclosure Agreements (NDA).
7. Datum retains all support sessions in video recording within 3 months for inquiries and quality checks.
8. Datum will provide FULL REMOTE support to resolve any issue(s) that the Client may encounter. If onsite support is unavoidable, Datum shall arrange for ON-SITE support. Onsite charges with T&A to be claimed as disbursement.

ProLine

Notes on Custom Implementation
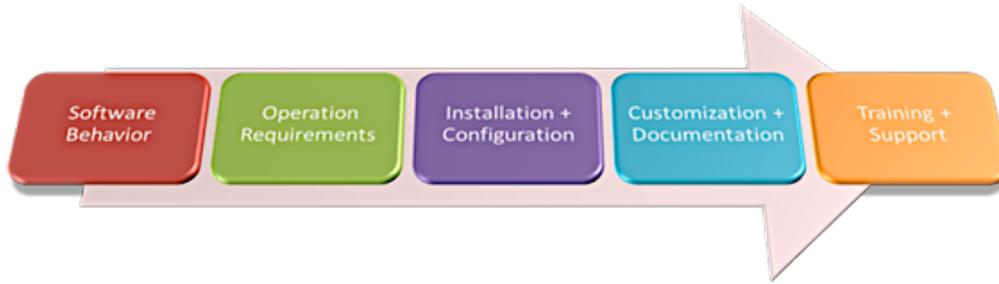
Unlike installing a software, a proper system needs implementation. System comprises of the equipment, software, people that uses it and the standardized procedures uniquely developed, held together with the internal support team. Once a system is properly implemented, it enables the company to be productive, responsive and easily managed.

Implementation involves understanding the software, identifying operation requirements and mapping the operations to software functions. A requirements gap will be formed during the mapping process when special requirements are not supported within the software.

Once the mapping and gaps are fully understood and viable for use, the next step is to install and configure, migrating data, train users and document the Standard Operating Procedures (SOP) for the system.

Note: The above software does not include implementation. Since each implementation is as unique as the company's operation and therefore estimates are only available after a study is conducted.

Alternatively, if skill sets are available within the company, they can perform the study themselves before engaging professionals to save costs.

Standard Terms & Conditions

1. Use of Software indicates your acceptance of the Standard Terms & Conditions and the End-User License Agreement (EULA).

2. All jobs must be acknowledged by using job sheets, which to be signed by both parties and considered as per incident. If the Client requires support for other problems, it will be considered as another incident for such case.

3. Datum will not be responsible for any loss of items or components after the personnel in charge returns with the signed job sheet. Client is to confirm that the personnel in charge are to be checked before leaving its premises.

4. Datum reserves the right to charge 10% per year on any outstanding amount if it is not paid within 30 days from the date of the invoice(s).

5. Non-Disclosure Clause – In providing services to the Client, Datum will come into contact with the Client's information assets.

6. "Information Assets" shall mean any information, but not limited to, trade secrets, business processes, business plans, data of any kind, customer lists, financial statements, sales data, proprietary business information of any sort and/or any non-public information which concern the business, operations, or plans including, but not limited to, written, typed, magnetic, or orally transmitted.

7. Datum shall take reasonable efforts to prevent and protect the Client's information assets, or any part thereof, from falling into the public domain and/or disclosure to any person other than the Client's employees having a need for disclosure in connection with the Client's authorized use of the information asset.

ProLine

Minimum System Requirements

Workstations

- Desktop or Notebook
- Windows XP (all editions)
- 1GB RAM, 10GB Harddisk
- 2GHz Dual Core Processor or better
- XGA or Wide Screen Display recommended

Networking

- TCP/IP LAN Network of 10/100Mbps.
- Minimum of 384k broadband access for Email, Central Reporting, SSUS Subscription.
- Internet bandwidth of 512k is required for Branches connectivity.

Server

- Windows XP Service Pack 3 or Windows Server 2003 and above
- 2GB RAM and above, 40GB of empty hard disk space
- 2GHz 64-bit Dual Core Processor
- SVGA or better

Software Requirements

Microsoft .Net Framework 2.0, Microsoft Windows Installer 3.1, Microsoft Internet Explorer 6.0 SP1, Microsoft Data Access Components (MDAC) 2.7, TCP/IP Network installed with File and Printer Sharing enable (For Network version), Firewall rules - allow access for SQL Server and SQL Server Browser (For Network version).

Branch Connectivity

There are few ways to interconnect branches depending on the results required.

1. Remote Access To HQ

2. Database Updates

Branch database are updated to HQ periodically - mainly on hourly, daily or weekly basis.
A program will be installed to allow branch database to be backup and copied over to the HQ server automatically based on the preset schedules.

This can be done for one-way (branch to HQ) or two-way (branch to HQ and HQ to branch) updates.

Pros:

- Database backup on HQ
- Can generate branch reports from HQ anytime

Cons:

- Updates may be slow based on the size and speed of Internet line.
- Server need to be turned on at night for this to work
- Storage need to cater for all branches combined

3. Automated Reporting via Email

Capacity Planning

How to determine the size of storage?

- The service life of a server is between 5 to 8 years.
- The initial 20MB database size could grow up to 1GB yearly depending on the number of records keyed into the ProLine system.
- For the first year, the hard disk space usage forecast are between 20GB to 40GB for the database files, server applications, office documents, pictures and other project files.
- Multiply this number with 8 years, the calculated total would be between 160GB to 320GB of data at the end of the server's service life.
- Then the recommended server hard disk space would be either 320GB or 500GB.

Backup storage

- The backup storage should have the capacity to backup the entire server in case of failure, as well as all the archived data.
- A USB connected or networked external storage with at least the double the capacity of the server's hard disk space is recommended.
- Based on the above recommendation, the preferred backup storage size should be between 500GB to 1TB. You will require at least 2 units of backup disk with same capacity.

Note on SQL Database Server Licensing

ProLine can be installed on Microsoft SQL Server 2005 Express Edition, which free of charge. However, this edition has a limitation of 4GB per database and single CPU utilization. If usage exceeds the said limitations, then it is required to purchase the SQL 2005 Standard Edition.

For more information, please visit http://www.microsoft.com/Sqlserver/2005/en/us/compare-features.aspx

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