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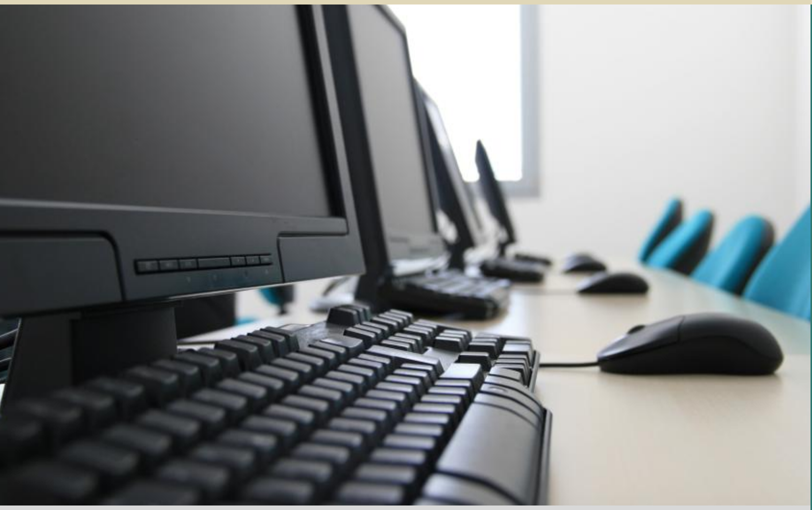

Customer Projects

User Guide

V2.2

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1.0. Module Overview

The Customer Projects module, designed for the use of sales and other relevant employees, serves as a platform for users to manage and oversee projects being pursued by their customers. The module can simplify the organization and management of resources to ensure that the products are delivered within the customers' pre-defined requirements. It can also help the users coordinate execution of project related tasks and facilitate resolution of customer issues for the duration of the project timeline.

In this section, the unique features and User Interfaces relating to the Customer Projects module will be described including the terminologies used.

2.0. Using the Module

2.1. Customer Projects Summary Page

Upon clicking on the Customer Projects link in the Teczo home page, the user will be directed to the Customer Projects Summary Page which is composed mainly of the Filter and Summary Table.

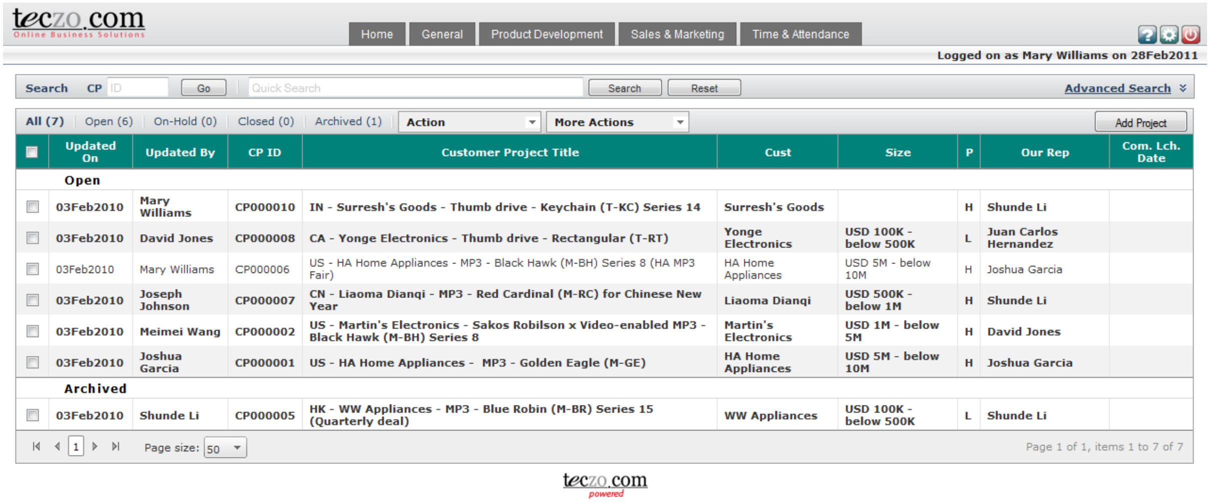


Figure 1: *Customer Projects Summary Page*

2.1.1. Customer Projects Filter and Search

The table contains the definition of terms used in the Customer Projects Filter:

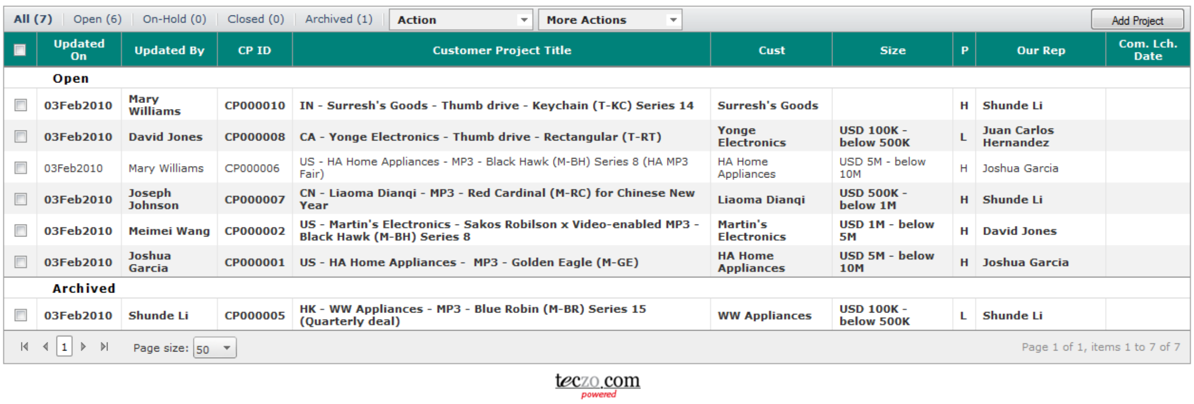
TERM	DEFINITION
CP	Manually input a unique ID of a customer project; This field accepts digits only
Quick Search	Input any text manually, except date, to filter the summary table and to list all customer projects whose detailed information contains the searched text.
State	The dropdown list where a state of the customer project can be selected *(Default Value: All)* • Open • On-Hold • Closed • Archived
Priority	The dropdown list where a priority level of the project can be selected *(Default Value: All)* • High (H) • Low (L) • Medium (M)
Country	The dropdown list to select the country of the project. *(Default value: All)*

TERM	DEFINITION
Size	The dropdown list where the size range of the project can be selected *(Default Value: All)* The Size field option can be customized by the administrators of the user's company in the System Administration module.
Status	Checkbox to select or deselect any project status which may be: • Read • Unread • Flag Note: *(Default value: All checked)*
Cust. Code	Manually input the code of customer for the desired project.
Date	The dropdown list to select a date range when a project is "Initiated On', "Updated On" or "Closed On" *(Default Value: All)* • Today • Last 7 days • Last 30 days • Last 90 days • Last 360 days
Person	The dropdown list to select a name for the selected search field of Initiated By, Immediate Respondent, Our Rep, Customer Project Member, Updated By, Closed By, or Submitted By. *(Default Value: All)*
Design Status	The dropdown list where the status of the projects can be selected: • Closed Deal • Lead/Prospect • Opportunity

Table 1: *Definition of Terms Used in the Customer Projects Filter*

2.1.2. Customer Projects Summary Table

The Customer Projects summary page will allow the users to view all the customer projects they have access rights.



All (7) | Open (6) | On-Hold (0) | Closed (0) | Archived (1) | Action | More Actions | Add Project

	Updated On	Updated By	CP ID	Customer Project Title	Cust	Size	P	Our Rep	Com. Lch. Date
	Open								
	03Feb2010	Mary Williams	CP000010	IN - Surresh's Goods - Thumb drive - Keychain (T-KC) Series 14	Surresh's Goods		H	Shunde Li	
	03Feb2010	David Jones	CP000008	CA - Yonge Electronics - Thumb drive - Rectangular (T-RT)	Yonge Electronics	USD 100K - below 500K	L	Juan Carlos Hernandez	
	03Feb2010	Mary Williams	CP000006	US - HA Home Appliances - MP3 - Black Hawk (M-BH) Series 8 (HA MP3 Fair)	HA Home Appliances	USD 5M - below 10M	H	Joshua Garcia	
	03Feb2010	Joseph Johnson	CP000007	CN - Liaoma Dianqi - MP3 - Red Cardinal (M-RC) for Chinese New Year	Liaoma Dianqi	USD 500K - below 1M	H	Shunde Li	
	03Feb2010	Meimei Wang	CP000002	US - Martin's Electronics - Sakos Robilson x Video-enabled MP3 - Black Hawk (M-BH) Series 8	Martin's Electronics	USD 1M - below 5M	H	David Jones	
	03Feb2010	Joshua Garcia	CP000001	US - HA Home Appliances - MP3 - Golden Eagle (M-GE)	HA Home Appliances	USD 5M - below 10M	H	Joshua Garcia	
	Archived								
	03Feb2010	Shunde Li	CP000005	HK - WW Appliances - MP3 - Blue Robin (M-BR) Series 15 (Quarterly deal)	WW Appliances	USD 100K - below 500K	L	Shunde Li	

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Figure 2: *Default Summary Table*

A. Terminology

The table contains the definition of terms used in the Customer Projects Summary Table:

TERM	DEFINITION
Default Shown Fields	
Updated On	Indicates the date when the customer project is last updated *(system-generated)*
Updated By	Indicates the name of the user who last updated the customer project
CP ID	Indicates the Unique ID of the customer project *(system-generated)*
Customer Project Title	Indicates the title of the customer project
Cust	Indicates the code of the customer who owns the project
Size	Shows the size range of the project
P	Indicates the priority level of the project
Our Rep	Indicates the name of Sales representative for the project
Com. Lch. Date	Indicates the commercial launch date of the project

Table 2: *Summary Table Terminology*

B. Summary Table

A user can only view all the customer projects they have access rights. By default, the user can view the summary table with the following fields:

- Updated On
- Updated By
- CP ID
- Customer Projects Title
- Cust
- Size
- P *(Priority)*
- Our Rep
- Com. Lch. Date

Note: Other general features of the summary page, are documented in the Essential Features User's Guide, Section 3.0.

2.2. Customer Projects Details

The table constains the definition of terms used in the Customer Projects details.

TERMS	DESCRIPTION
Customer Project ID	Indicates the Customer Project ID combined with Customer Project Title
Immediate Respondents	Shows the selected users required to respond to the project immediately
Cust. Code	Indicates the code of the customer who owns the project
Size	Shows the size range of the project
Submitted By	Indicates the name of the user who submitted a topic
Submitted On	Indicates the date when the project was submitted
Initiated By	Indicates the user who initiated the project
Initiated On	Indicates the date when the project is created
Updated By	Indicates the name of the most recent user who updated the project, edited the details, posted a comment or modified the access rights
Updated On	Indicates the date when the project is last updated
Closed By	Shows the name of the user who closed the topic
Closed On	Shows a system-generated date when a project is marked closed
State	Indicates the state of the project
Design Status	Indicates the status of the project
Priority	Indicates the priority level of the project
Country	Shows the country of the project
Currency	Displays the currency used for the project
Customer Name	Indicates the name of the customer for the project
Description	Indicates the description of the project
Keywords	Shows tags for faster searching
Our Rep	Indicates the name of Sales representative for the project

Update History	Indicates the recent changes of the project details: • Last Update – Date and time when the details are last updated or edited • Fields – edited or changed fields in the project details from the last update
Update History List	Indicates the link to update history list of all the changes made in the project details
Attachments	Shows the file names of the attachments uploaded by the initiator during the creation of the project
Products	Indicates the products which are being used in the project
Product Name	Indicates the name of the product
Qty	Indicates the quantity of the product
Unit	Indicates the unit of measurement for the project
Unit Price	Shows the unit price of the product
Total Amount	Displays the total amount of the product
Delivery Date	Indicates the delivery date of the product
Comments	Shows comments added by the users that have access rights to the project.
Quote	Indicates user quotes in a particular comment.
Access Rights	Indicates the names of the users that are allowed to access the project.

Table 3: *Customer Projects Details Terminology*

Note: Other general features on the Customer Projects Details are documented in the **Essential Features User's Guide**, Section 4.0.

2.3. Add/Edit Customer Projects and Comments

Module Administrator, Project Submitter, Creator and Company Representative can edit all the fields indicated in the Edit details page of a technical issue.

The Add/Edit Customer Projects and Comments full features are documented in the **Essential Features User's Guide**, Section 5.0, parts A and B respectively.

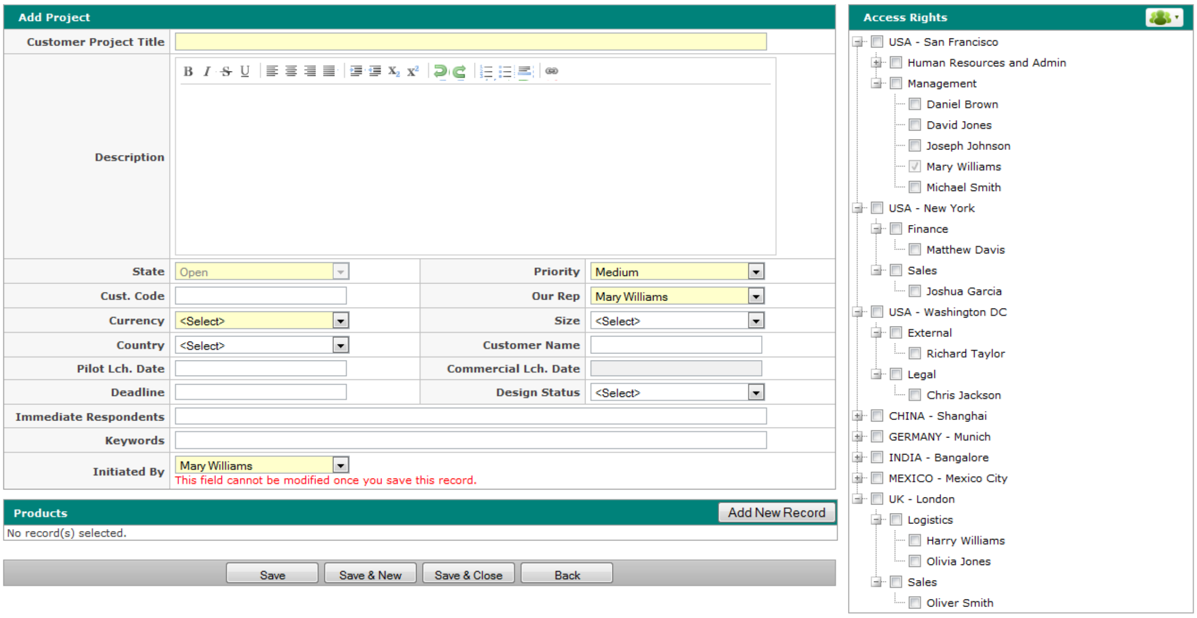

Figure 3: *Add Project Page*