



Scan to visit our AutoCount Website

Lead Plug-In

Table of Contents

1.0	Introduction
2.0	Installing the Plug-In
3.0	Assign Access Rights
4.0	Lead Status Maintenance
5.0	Lead Stage Maintenance
6.0	Lead Source Maintenance
7.0	Sales Agent Maintenance
8.0	Filter Sales Agent Maintenance
8.1	Login In the new User and setup the filter
9.0	Lead List Entry / Lead Maintenance
9.1	Post To Debtor
10.0	Reassign Agent
11.0	Pay Commission
12.0	Dashboard
13.0	Multi-Dimensional Lead Analysis



Scan to visit our AutoCount Website

1.0 Introduction

This plugin enables us to track customer interests, pair agents with specific clients, and provide thorough lead analysis and reporting.

We can efficiently identify preferences, assign dedicated agents, and gain insights through analysis tools. Additionally, it records customer lead status (e.g., 'Arrange Demo,' 'Demo,' 'Quote,' 'Successful'), ensuring precise tracking of interactions and progress across stages.

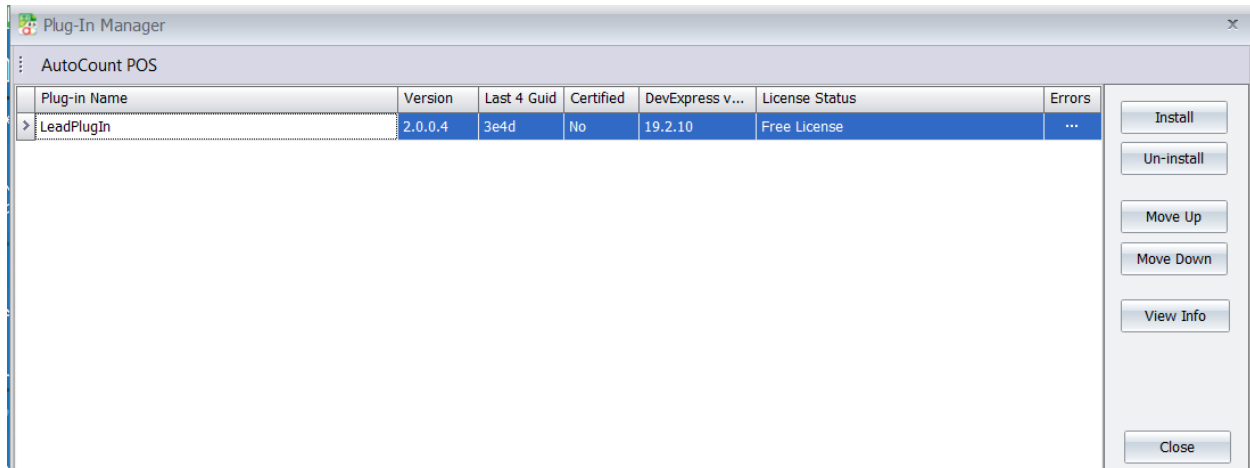


Scan to visit our AutoCount Website

2.0 Installing the Plug-In

1. Go to **Tools > Plug-In Manager**
2. Click on the **“Install”** button.
3. Browse for the related **.app file (LeadManagement)**
4. A new window will prompt with some basic information of this plug-in.
5. Click on the **“Install”** button again to proceed.
6. A confirmation message will be prompted after that.
7. Click **“Yes”** to confirm the installation.
8. A success message will appear after the plug-in is installed correctly.

 LeadManagement 18/08/2023 3:58 PM AutoCount Plugin ... 519 KB

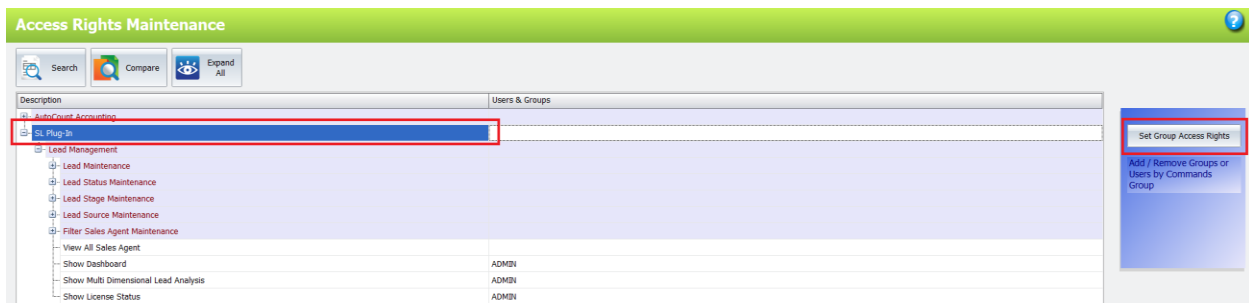
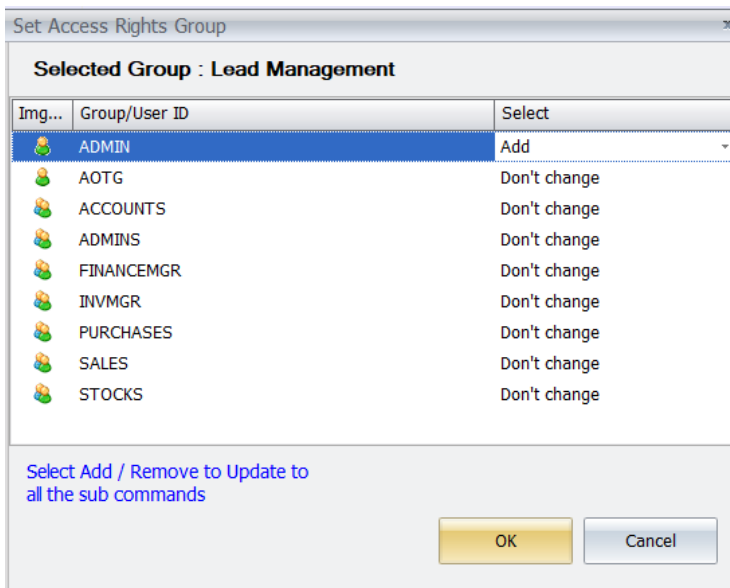




Scan to visit our AutoCount Website

3.0 Assign Access Rights

1. Go to **General Maintenance > Access Right Maintenance**
2. Locate the “SL Plug-In” and click on the “+” icon next to it.
3. Locate the “LeadManagement” and click on the “+” icon next to it.
4. Click on “LeadManagement” and proceed by clicking “Set Group Access Rights”.
5. In the pop-up window, navigate to “Admin”. **(Example)**
6. Change the “Don’t change” status to “Add”.
7. Click on “OK” to save changes.
8. Click on “Yes” to apply the Access Right to the rest of the sub commands.



SL Software Solutions Sdn Bhd (Reg No: 201601010552)

IPOH: 231A, Jalan Pasir Puteh, 31650 Ipoh, Perak, Malaysia

TAIPING: No 3450, Tingkat 1, Jalan Chung Thye Phin, 34000, Taiping Perak.

H/P: +6014-967-2631/+6012-540-6118 Email: autocountsystem@gmail.com Website: <https://autocountsystem.com/>



Scan to visit our AutoCount Website

4.0 Lead Status Maintenance

1. Go to *Lead* and press *Lead Status Maintenance*
2. Click the **“NEW”** button
3. Fill in the information
4. Press the **“OK”** button

NOTE: Lead Status that created can be use in the Lead List Entry

NOTE: Lead Status that created can be categorized under Lead Stage

Lead Status Maintenance

Drag a column header here to group by that column

Lead Status	Description	2nd Description	LeadStage
Arrange Demo	Arrange Demo		Qualifying
Contacted	Contacted		Qualifying
Demo	Demo		Negotiation
Lost	Lost		Lost
New	New		New
Quote	Quote		Negotiation
Success and Close	Success and Close		Won
Unable To Reach	Unable To Reach		Qualifying

Lead Status Entry Form

Active

Lead Status :

Description :

Stage :






Scan to visit our AutoCount Website

5.0 Lead Stage Maintenance

1. Go to *Lead* and press *Lead Stage Maintenance*
2. Click the “**NEW**” button
3. Fill in the Information
4. Press the “**OK**” button

(NOTE: Lead Stage can be use to categorized when Lead Status create)

Lead Stage Maintenance

Drag a column header here to group by that column

Lead Stage	Description	2nd Description
> Lost	Lost	
Negotiation	Negotiation	
New	New	
Qualifying	Qualifying	
Won	Won	

Lead Stage Entry Form

Lead Stage : Active

Description :



Scan to visit our AutoCount Website

6.0 Lead Source Maintenance

1. Go to *Lead* and press *Lead Source Maintenance*
2. Press “**New**” button to create new Lead Source
3. Fill in the *Lead Source* and *Description* and press “**OK**” button
4. Press the **Referral** that create **just now** and Click the “**Details**” Button
5. Then will pop-out a window, click the “**NEW**” button to create the details for the referral person.
6. Fill in the information and click “**OK**”
(NOTE: Step 4-6 is to create the details person who referral)

The screenshot shows the 'Lead Source Maintenance' interface. At the top, there is a green header with the title 'Lead Source Maintenance'. Below the header, there are four buttons: 'New' (highlighted with a red box), 'Edit', 'Delete', and 'Detail'. Below the buttons, there is a table with two columns: 'Lead Source' and 'Description'. The table contains one row with 'Existing Customer' in both columns. Below the table, there is a modal window titled 'Lead Source Entry Form'. The modal has two text input fields: 'Lead Source' (containing 'Referral') and 'Description' (containing 'Referral'). There is also a checked checkbox labeled 'Active'. At the bottom of the modal, there are two buttons: 'OK' (highlighted with a red box) and 'Cancel'.

Lead Source	Description
Existing Customer	Existing Customer

Lead Source Entry Form

Lead Source : Referral Active

Description : Referral

OK Cancel



Scan to visit our AutoCount Website

Lead Source Detail Maintenance

Lead Source Detail Maintenance

Drag a column header here to group by that column

Lead Source Detail	Description	2nd Description	Active	Commission	Commission Rate
--------------------	-------------	-----------------	--------	------------	-----------------

Lead Source Detail Entry

Lead Source Detail : TAM Active

Description :

Commission

Commission Rate : 10



Scan to visit our AutoCount Website

7.0 Sales Agent Maintenance

1. Go to *General Maintenance* and press *Sales Agent Maintenance*
2. Click on the **"New"** Button
3. Fill in the Information and Click **"OK"** Button

Sales Agent Maintenance

Hint: Sales Agent Maintenance allows you to create and maintain the sales personnel record.

New **Edit** **Delete** **Print Listing** **Commission** **Refresh**

Sales Agent	Description	2nd Des
> WEDIA		

New Sales Agent

Sales Agent : Active

Description :

Signature

Signature : (128x128 pixels)

No image data

SL Software Solutions Sdn Bhd (Reg No: 201601010552)

IPOH: 231A, Jalan Pasir Puteh, 31650 Ipoh, Perak, Malaysia

TAIPING: No 3450, Tingkat 1, Jalan Chung Thye Phin, 34000, Taiping Perak.

H/P: +6014-967-2631/+6012-540-6118 Email: autocountsystem@gmail.com Website: <https://autocountsystem.com/>



Scan to visit our AutoCount Website

8.0 Filter Sales Agent Maintenance

(Below will explain first how to create **new user** and explain how to use **Filter Sales Agent Maintenance**)

1. Go to **General Maintenance** and press **User Maintenance** (Create User)
2. Click the **“NEW”** Button
3. Fill in the information
4. Press **“+”** button at the **User Group**
5. Choose **Admins**
6. Click the **“SAVE”** Button

User Maintenance

Buttons: New, Edit, View, Delete, Set Password, Refresh

User ID	User Name	Department	Filter By Sales Agent	Filter By Purchase Agent	Active
> ADMIN	Administrator	Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
AOTG	AOTG Client		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

User Editor

Buttons: Save, Copy From..., Copy To..., Cancel

User Login ID: michael
 User Name: michael
 Password: ***** Password Strength: Weak
 Confirm Password: *****
 Password Age: Password never expired. Password expired after 60 days

Active:
 Department: _____
 Email Address: _____
 Network User Type: Full System, Account Only, Stock Only

Signature (Right Click to Load Image): No image data

User Info | Access Right

Default Value

Default Location: _____ Filter By Created User:
 Default Project: _____ Filter By Last Modified User:
 Default Department: _____

Credit Control

Sales Credit Limit Increment Percentage: 0.00 %
 Sales Overdue Limit Increment Percentage: 0.00 %

User Group

Group ID: _____
 > ADMIN

7. Go to **Lead** and press **Filter Sales Agent Maintenance**
8. Press the user that created and press **“Edit”** button

SL Software Solutions Sdn Bhd (Reg No: 201601010552)

IPOH: 231A, Jalan Pasir Puteh, 31650 Ipoh, Perak, Malaysia

TAIPING: No 3450, Tingkat 1, Jalan Chung Thye Phin, 34000, Taiping Perak.




H/P: +6014-967-2631/+6012-540-6118 Email: autocountsystem@gmail.com Website: <https://autocountsystem.com/>



Scan to visit our AutoCount Website

9. **Tick** the sales agent that you allow the user to check
(Note: User that I create just now is 'Michael', I have tick Jack, so Michael can only view Jack Sales Agent)
10. Click the **"SAVE"** button

Filter Sales Agent Maintenance

 Edit  View  Refresh

User ID	User Name
ADMIN	Administrator
AOTG	AOTG Client
UserA	UserA
> michael	michael

Edit Filter SalesAgent User : [michael]

User ID : michael
User Name :

Search Result Keep Search Result

Check	Sales Agent
<input type="checkbox"/>	WEDJIA
<input checked="" type="checkbox"/>	Jack



Scan to visit our AutoCount Website

8.1 Login In the new User and setup the filter

Now Login in the new user account that created just now

1. Type the **User ID** and **password** and **Login**
2. Go to *General Maintenance* and press *Access Right Maintenance*
3. Click “+” on the **SL Plug-In**
4. Click “+” on the **Lead Management**
5. Click on the **SL Plug-In** and press “**Set Group Access Rights**” button
6. Press the user that created and ‘**Select**’ change to **add**
7. Press “**OK**” button
8. Press **Yes** when the pop out message “Apply this setting to all sub commands?”
9. Click the row “**View All Sales Agent**” and **untick** the users that you created (for my user that create just now is **Michael**)
10. Click “**Apply**”



Scan to visit our AutoCount Website

The screenshot shows the AutoCount Accounting login window and the Access Rights Maintenance interface. The login window displays the AutoCount logo, version 2.1, and a table of system configurations. The Access Rights Maintenance interface shows a tree view of system components, with 'SL Plug-in' highlighted. A 'Set Group Access Rights' button is visible on the right side of the interface.

Company Name	Remark	Version	Server	Database Name
sample		2.2.46	(local)\A2006	AED_sample
leadacc		2.2.46	(local)\A2006	AED_leadacc

System Date: 19/08/2023, Saturday

User ID: MICHAEL
Password: *****

Access Rights Maintenance

Description	Users & Groups
AutoCount Accounting	
SL Plug-in	
Lead Management	
Lead Maintenance	
Lead Status Maintenance	
Lead Stage Maintenance	
Lead Source Maintenance	
Filter Sales Agent Maintenance	
View All Sales Agent	
Show Dashboard	ADMIN
Show Multi Dimensional Lead Analysis	ADMIN
Show License Status	ADMIN

SL Software Solutions Sdn Bhd (Reg No: 201601010552)

IPOH: 231A, Jalan Pasir Puteh, 31650 Ipoh, Perak, Malaysia

TAIPING: No 3450, Tingkat 1, Jalan Chung Thye Phin, 34000, Taiping Perak.

H/P: +6014-967-2631/+6012-540-6118 Email: autocountsystem@gmail.com Website: <https://autocountsystem.com/>



Scan to visit our AutoCount Website

Set Access Rights Group

Selected Group : SL Plug-In

Img...	Group/User ID	Select
	ADMIN	Don't change
	AOTG	Don't change
	michael	Add
	UserA	Don't change
	ACCOUNTS	Don't change
	ADMINS	Don't change
	FINANCEMGR	Don't change
	INVMGR	Don't change
	PURCHASES	Don't change
	SALES	Don't change

Select Add / Remove to Update to all the sub commands

Confirm

Apply this settings to all sub commands?

Yes No Cancel

OK Cancel

Description	Users & Groups
AutoCount Accounting	
SL Plug-In	
Lead Management	
Lead Maintenance	
Lead Status Maintenance	
Lead Stage Maintenance	
Lead Source Maintenance	
Filter Sales Agent Maintenance	
View All Sales Agent	michael
Show Dashboard	ADMIN, michael
Show Multi Dimensional Lead Analysis	ADMIN, michael
Show License Status	ADMIN, michael

Set Access Rights

Apply Cancel

Select All Clear All

- ADMIN
- AOTG
- michael
- UserA
- ACCOUNTS
- ADMINS
- FINANCEMGR
- INVMGR
- PURCHASES

Untick



Scan to visit our AutoCount Website

9.0 Lead List Entry / Lead Maintenance

1. Go to *Lead* and press *Lead List Entry*
2. Click the “**NEW**” Button
3. Fill in the information (For example *Lead Source* is Referral, *Source Detail* can choose people that you create)
4. Right Click on the Completion Task and Press “**Add**”
5. Fill in the information
6. Press “**SAVE**” Button

(NOTE: At the Completion Task, the Lead Status that created can be Add)

New Lead List - [Next Possible No: LD-000002]

Home

Save as Template
Save

Lead Information

Debtor Code: [Dropdown] Lead Number: <<New>> [Dropdown]
 Company Name: FONG Sdn Bhd Date: 19/08/2023 [Dropdown]
 Address: 23A Jalan Jalong, Taman Jalong Phone1: [Text]
 Phone2: [Text]
 Mobile: [Text] +60 [Text]
 Fax: [Text]
 Area: [Dropdown]
 Attention: Fong (011-43556723) Email: [Text]
 Nature of Business: [Text] Website: [Text]
 Product of Interest: AutoCount Assigned To: Jack [Dropdown]
 Rating: ★★☆☆ Lead Source: Referral [Dropdown]
 Source Detail: TAM [Dropdown]
 Commission 10

Note

Arial 10 B I U [Text]
 [Rich Text Editor]
 Insert Lead Status

Completion Task | Billing Info

Completion Date	Lead Status	Comment	Created User
> 19/08/2023 09:45	new		ADMIN

+ Add
- Delete

Record 1 of 1

Save Cancel



Scan to visit our AutoCount Website

Home

Save as Template Save

Lead Information

Debtor Code	300-F001	Lead Number	LD-000002
Company Name	FONG Sdn Bhd	Date	19/08/2023
Address	23A Jalan Jalong, Taman Jalong	Phone1	
		Phone2	
		Mobile	+60
		Fax	
		Area	
Attention	Fong (011-43556723)	Email	
Nature of Business		Website	
Product of Interest	AutoCount	Assigned To	WEDIA
Rating	☆☆☆	Lead Source	Referral
		Source Detail	TAM
		<input checked="" type="checkbox"/> Commission	10

Note

Arial 10 B I U

Insert Lead Status

Completion Task Billing Info

Completion Date	Lead Status	Comment	Created User
19/08/2023 09:45	New		ADMIN
19/08/2023 09:53	Success and Close		ADMIN

Record 2 of 2

Save Cancel

SL Software Solutions Sdn Bhd (Reg No: 201601010552)

IPOH: 231A, Jalan Pasir Puteh, 31650 Ipoh, Perak, Malaysia

TAIPING: No 3450, Tingkat 1, Jalan Chung Thye Phin, 34000, Taiping Perak.

H/P: +6014-967-2631/+6012-540-6118 Email: autocountsystem@gmail.com Website: <https://autocountsystem.com/>



Scan to visit our AutoCount Website

9.1 Post To Debtor

If Debtor Code is not Information, need **“Post To Debtor”**

1. Click the *Lead Maintenance* that created and click the **“VIEW”** Button
2. Click the **“Post To Debtor”** and fill in the information
3. Click the **“SAVE”** Button and click **“Refresh”** button to refresh it

The screenshot displays the 'Lead Maintenance' interface. At the top, there is a green header with the title 'Lead Maintenance'. Below the header is a toolbar with buttons for 'New', 'Edit', 'View', 'Preview', 'Print', 'Print Listing', 'Delete', 'Refresh', and 'Pay Commission'. The 'View' button is highlighted with a red box. Below the toolbar is a table with columns: Debtor Code, Lead Number, Date, Company N..., Attention, Nature of B..., Lead Source, Lead Sour..., Last Lead S..., Phone1, Email, Mobile, and Product c. The 'Debtor Code' column contains the value 'LD-000002'. A yellow callout box with the text 'Not Information' points to the 'Debtor Code' cell. Below the table is a sub-section titled 'View Lead List - [LD-000002]'. This section contains a toolbar with buttons for 'Preview', 'Print', 'WhatsApp', 'Edit', 'Delete', 'Post To Debtor', 'Reassign Agent', and 'Navigation'. The 'Post To Debtor' button is highlighted with a red box. Below this toolbar is a 'Lead Information' section with fields for 'Debtor Code', 'Lead Number', 'Company Name', and 'Date'. The 'Debtor Code' field contains 'LD-000002', 'Lead Number' contains 'LD-000002', 'Company Name' contains 'FONG Sdn Bhd', and 'Date' contains '19/08/2023'. To the right of the 'Lead Information' section is a 'Note' section with a dropdown menu set to 'Arial' and a text input field containing '10'.



Scan to visit our AutoCount Website

New Debtor Account - [300-F001] - sample - AutoCount Accounting (Ver: 2.1)

Edit Copy Debtor

Control Account : 300-0000 Debtor Type : Group Company

Company Name : FONG Sdn Bhd Active

Registration No. : Debtor Account : 300-F001 +

General Contact Branches Tax Exemption Others Note User Defined Field

Billing Address : 23A Jalan Jalong, Taman Jalong Phone :

Mobile : [+60](#)

Fax :

Post Code :

Delivery Address : Area :

Email Address :

Website :

Post Code :

Attention : Fong (011-43556723) Agent : Jack

Business Nature : Currency :

Statement Type : Aging On : Credit Term : C.O.D.

Open Item Invoice Date Due Date

Balance Forward No Statement

After save, proceed with new debtor

SL Software Solutions Sdn Bhd (Reg No: 201601010552)

IPOH: 231A, Jalan Pasir Puteh, 31650 Ipoh, Perak, Malaysia

TAIPING: No 3450, Tingkat 1, Jalan Chung Thye Phin, 34000, Taiping Perak.

H/P: +6014-967-2631/+6012-540-6118 Email: autocountsystem@gmail.com Website: <https://autocountsystem.com/>



Scan to visit our AutoCount Website

10.0 Reassign Agent

1. Go *Lead* and press *Lead List Entry*
2. Choose the Lead Maintenance that created and press “**View**” Button
3. Press the “**Reassign Agent**” Button
4. At the Sales Agent Column choose the new agent that want to assign
(Example: another agent created is WEIJIA)
(7.0 has teaching how to create new agent)
5. Click the “**SAVE**” Button

Lead Maintenance

Buttons: New, Edit, **View**, Preview, Print, Print Listing, Delete, Refresh

Debtor Code	Lead Number	Date	Company N...	Attention	Nature of B...	Lead Source	Lead Sourc...	Last Lead S...	Phone1
> 300-F001	LD-000002	19/08/...	FONG Sdn B...	Fong (011-4...		Referral	TAM	Success and...	

View Lead List - [LD-000002]

Buttons: Home, Preview, Print, WhatsApp, Edit, Delete, Post To Debtor, **Reassign Agent**, Navigation

Lead Information

Debtor Code	300-F001	Lead Number	LD-000002
Company Name	FONG Sdn Bhd	Date	19/08/2023
Address	23A Jalan Jalong, Taman Jalong		
Phone1			
Phone2			

Note: Arial

View Lead List - [LD-000002]

Buttons: Home, Preview, Print, WhatsApp, Edit, Delete, Post To Debtor, **Reassign Agent**, Navigation

Lead Sales Agent Assignment

Lead Information

Debtor Code: [Text Box]

Lead Number : LD-000002

Company Name : FONG Sdn Bhd

Address : [Text Box]

Date Updated	Sales Agent	Reason
> 19/08/2023	Jack	First assigned to
19/08/2023	WEIJIA	

Attention : [Text Box]

Nature of Bu : [Text Box]

Product of In : [Text Box]

Rating : [Text Box]

Record 1 of 2

Buttons: Save, Cancel

SL Software Solutions Sdn Bhd (Reg No: 201601010552)

IPOH: 231A, Jalan Pasir Puteh, 31650 Ipoh, Perak, Malaysia

TAIPING: No 3450, Tingkat 1, Jalan Chung Thye Phin, 34000, Taiping Perak.

H/P: +6014-967-2631/+6012-540-6118 Email: autocountsystem@gmail.com Website: <https://autocountsystem.com/>



Scan to visit our AutoCount Website

11.0 Pay Commission

1. Go *Lead* and press *Lead List Entry*
2. Choose the Lead List Entry /Lead Maintenance that created and press “**Pay Commission**” Button
(Note: if commission already paid)
3. Tick the Pay Column and Press “**OK**” button

Lead Maintenance

New Edit View Preview Print Print Listing Delete Refresh **Pay Commission**

Drag a column header here to group by that column

Debtor Code	Lead Number	Date	Company N...	Attention	Nature of B...	Lead Source	Lead Sourc...	Last Lead S...	Phone1	Email	Mobile	Produ
> 300-F001	LD-000002	19/08/...	FONG Sdn B...	Fong (011-4...		Referral	TAM	Success and...				AutoC

Pay Commission Entry Form

Pay	Lead Number	Company Name	Rate	Pay To	Remark
<input checked="" type="checkbox"/>	LD-000002	FONG Sdn Bhd	10	TAM	

Record 1 of 1

x [Pay] <> 'T'

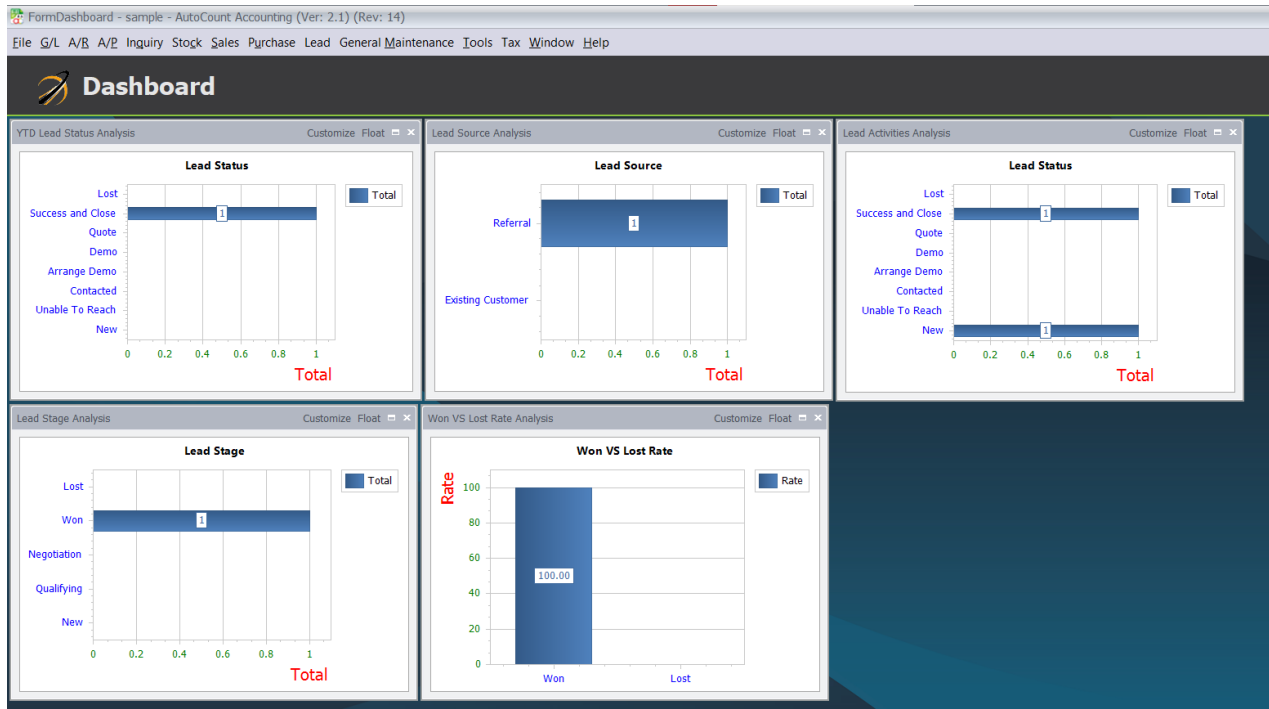
OK Cancel



Scan to visit our AutoCount Website

12.0 Dashboard

1. Go to *Lead* and press *Dashboard*
2. Report will show out





Scan to visit our AutoCount Website

13.0 Multi-Dimensional Lead Analysis

1. Go to *Lead* and press *Multi-Dimensional Lead Analysis*
2. Can drag the column customize
3. Press the "Inquiry" button

Multi-Dimensional Lead Analysis

Filter Option

Date Range : 04/07/2023 to 30/08/2023

Lead Number : No filter

Lead Status : No filter

Lead Stage : No filter

Lead Source : No filter

Area : No filter

Inquiry Preview Hide Options Close

Lead Number Address 4 Address 3 Area Lead Status Lead Stage Nature Of Business Product Of Interest Date Address 2

Count Company Name Address 1 Debtor Code Lead Source Here is also Row Fields

Drop Row Fields Here

- FONG Sdn Bhd
- 23A Jalan Jalon...
- 300-F001
- Referral

Count Total	1
-------------	---