



**8 All-in-one**

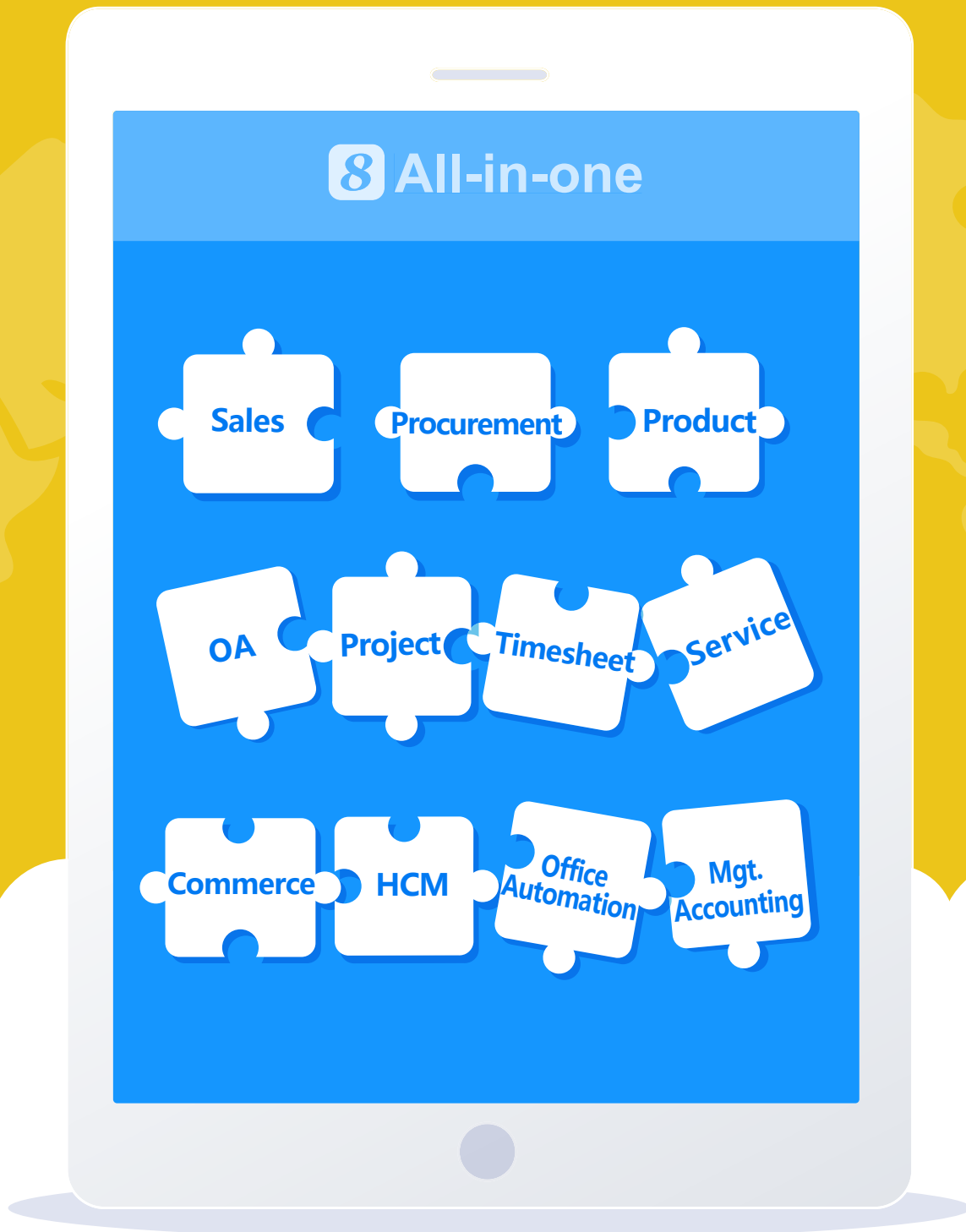
**8 All-in-one**

Designed for digital enterprise management  
so that employees, customers, suppliers  
and partners can all conduct business online and in real-time.

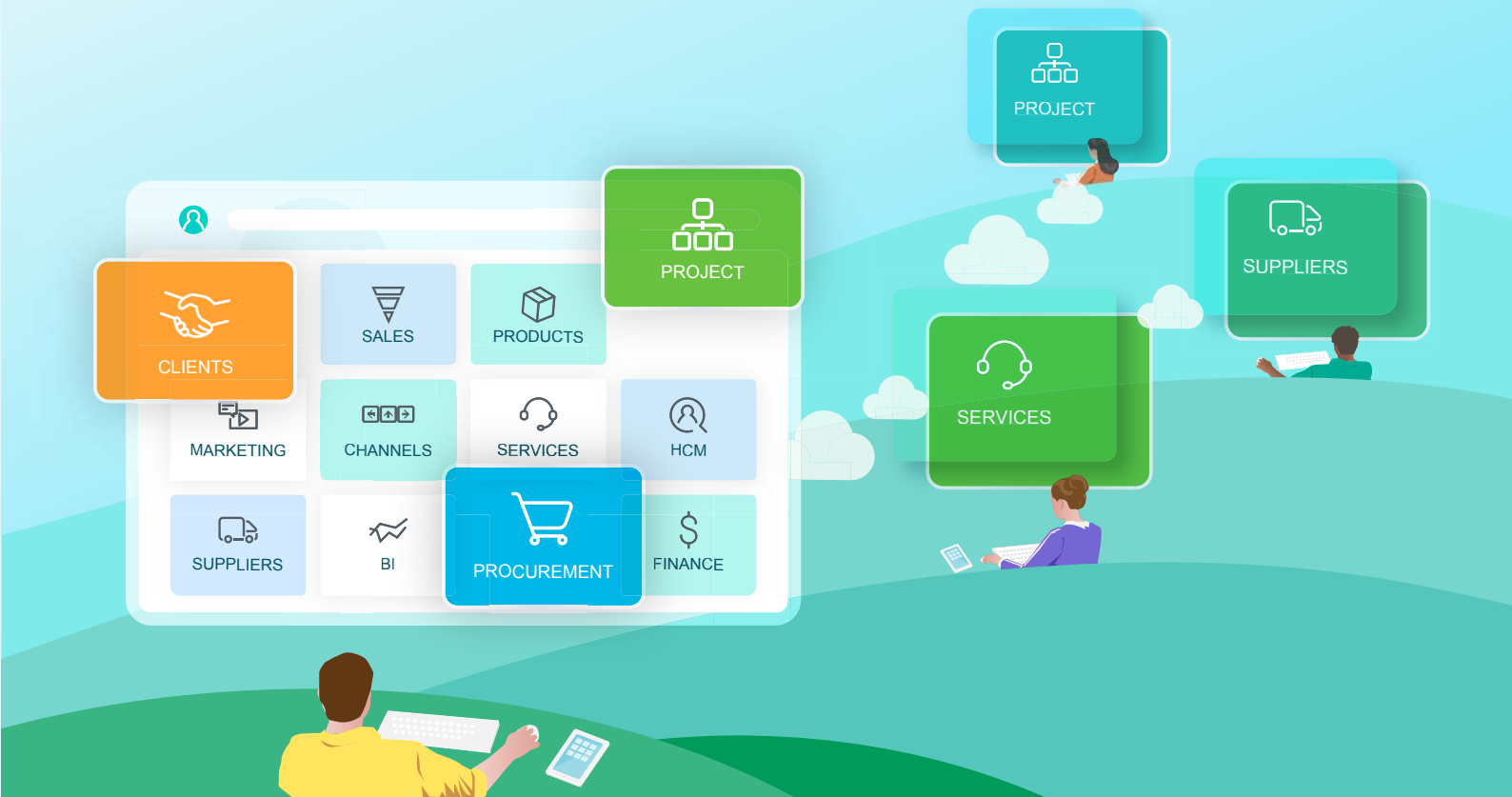
## 8 All-in-one

Employees, clients, suppliers and partners are all online to achieve:

- Full automation
- Full digitalization
- Remote working anytime anywhere



**8 All-in-one was designed for remote enterprise management. Using 8 All-in-one, employees, clients, suppliers, and partners all can be online to achieve full automation, full digitalization and remote working anytime anywhere.**



The biggest difference of **8 All-in-one** from the other enterprise management software is its real-time integrated data capability. Our technology allows the executives to view the activities and results of their corporation at any level of details at anytime. The zero delay of integrated information with the multi-level drill-down capability enables the executives to predict trends as well as detect performance discrepancy at the earliest possible time. The same benefits apply to the business managers, line managers, project managers and teams. **8 All-in-one** provides different aspects of information and different levels of details for people of different responsibilities in the corporation. The zero delay of integrated information allows people to detect potential changes of their dependencies, shortfalls of their resources and deviations of their committed results in real-time and take actions accordingly at the earliest possible time. In today's corporate environments without **8 All-in-one**, many managers and workers have no choice but finger-pointing other than problem-solving because the delayed, scattered, non-representative and un-drillable information doesn't allow them to proactively solve problems but reactively defend themselves. Suppliers Products Project Sales Services Finance Channels BI Offices Services Procurement HCM Clients **8 All-in-one**.

# 1 CRM

8 All-in-one has comprehensive client management, campaign management, sales force automation and service management functionality based on the latest technology and allows your clients to closely [connect to your business](#) and operations at anywhere at anytime. Using 8 All-in-one, your clients can request and receive and your business and operations departments can generate quotations, sales orders, delivery notices and provide services at anywhere at anytime.



8 All-in-one customer loyalty programs and BI allow membership clients receive special cares, points and rewards and your business and operations departments to analyze customer buying patterns and behaviors and product performance.

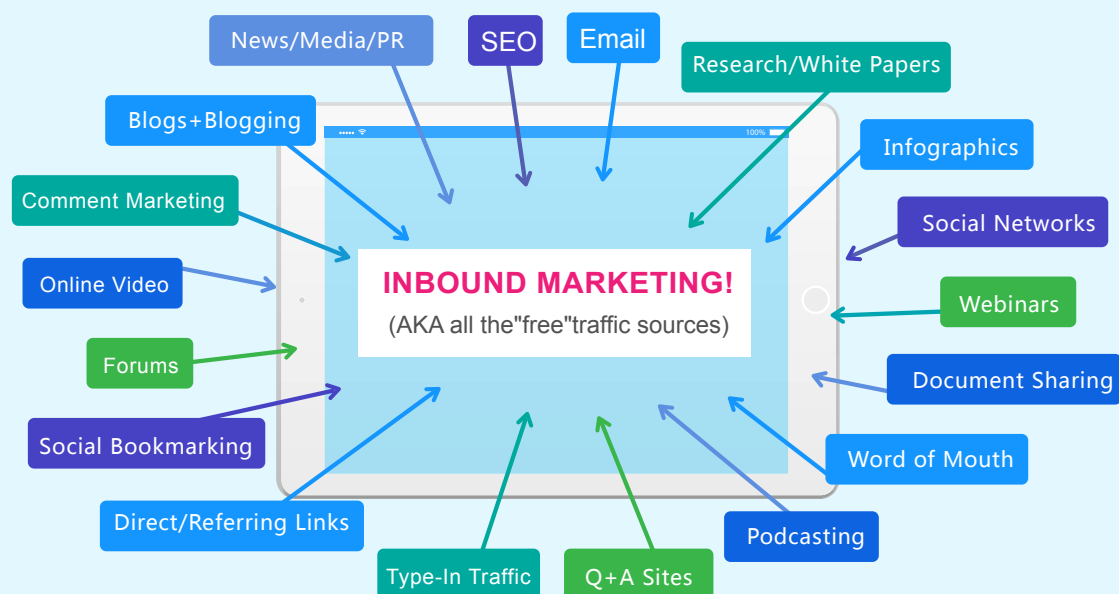
## 1、 Client Management



8 All-in-one allows your organization to automatically capture and maintain **contact**, **relational**, **interactional**, **behavioral**, **transactional** and **financial** information for each client in the central repository and provides different views of the information to different departments in real-time. 8 All-in-one also supports **global clients** with **multiple names** conducting businesses with **multiple organizations** in the enterprises.

## 2、 Campaign Management

8 All-in-one allows you to **define** (objectives, theme and target audience), **design**, **schedule** and **execute** marketing campaigns **through multiple** channels for product or brand name promotion and **track** their performance in terms of actual returns (e.g., leads, opportunities, revenue). 8 All-in-one also supports content creation and personalization for specific groups or individuals for one-to-many and one-on-one marketing.



### 3、 Sales Force Automation

As sales team members, you can count on **8 All-in-one** to help you look-up client and contact profile and value information, manage and track sales leads and opportunities, manage client appointments, activities and tasks, prepare quotations as well as create client interaction reports, sales performance reports and forecasts. As sales managers and executives, your business objectives are to guide the delivery of the planned revenue, profit and cash-flow on target and on-time and to grow the sales teams in skills, expertise and performance. **8 All-in-one** provides a holistic view of your business as a whole with links that you can drill down to any level of details for your sales opportunity reports and sales performance reports by sales rep, team or territory.



### 4、 Loyalty & Membership Management

Using **8 All-in-one Membership Management** , you can design your own membership and loyalty programs to retain customers and promote additional businesses. **8 All-in-one Membership Management** can help you get closer to your high value customers and more effectively influence their choices and behaviors.



8 All-in-one Membership Management allows you to design different types of memberships and privileges and it can automatically perform different levels of customer cares, record membership points and notify members on special events, gifts and discounts. 8 All-in-one Membership Management allows you to set promotion rules for different types of memberships in different geographical locations and manage membership-related gifts, coupons and discounts. 8 CRM Membership Management also provide mobile-app or web based member self-service to allows members to view their transaction and accumulated point summary and use their points to exchange the rewards that they want.

## 5. Customer Service Management

In 8 All-in-one's Customer Service, your customer is set-up as an 8 All-in-one external log-on user. The users from the customer may view a list of [Service Tickets](#) that they submitted previously. By clicking on links, they can view responses for individual Service Ticket.



Product  
Configuration



Service Desk



Problem Mgmt



Onsite Mgmt

All active Service Ticket are being tracked automatically. In the event a response is not received by the customer within a preset period, an escalation email will be sent to the service reps manager. Additionally, if the customer is not satisfied with the service response, it has the option to initiate the escalation and an alert email will be sent to the service rep's manager and the service rep.

## 2 Product Management

**8** All-in-one helps you to deal with increasingly complex product requirements, channels and transactions. It supports end-to-end business process of marketing, selling, purchasing and servicing products. It provides you 2-way tracking capability of product to clients, channels, suppliers, inventories, deliveries, acceptances, returns and services.

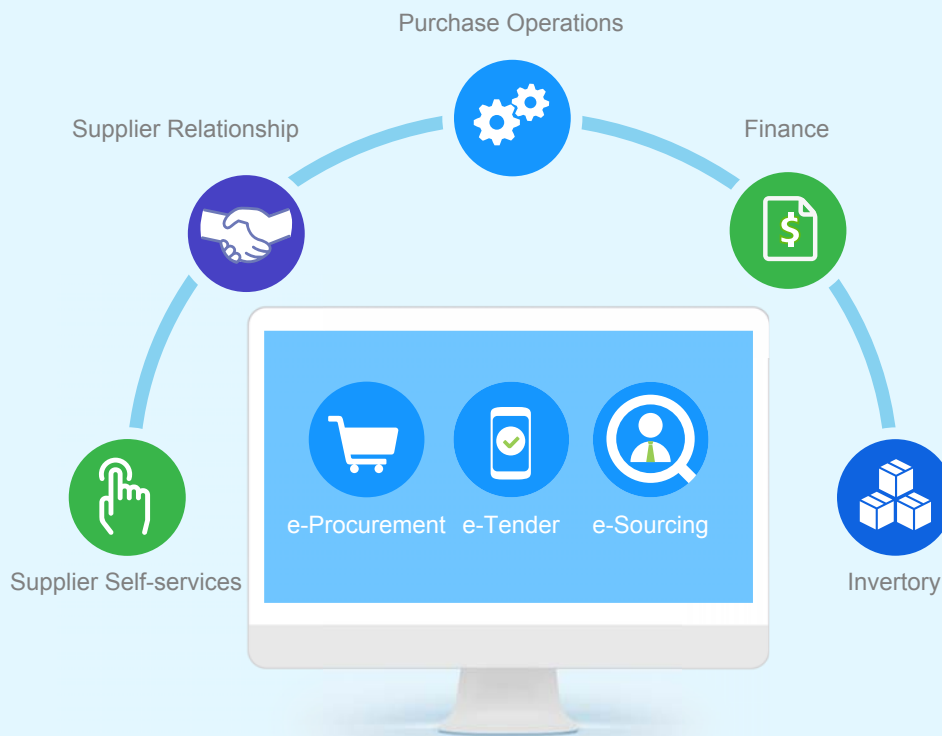


**8** All-in-one product master includes all information such as cross-selling, up-selling pricing, packaging, shipping, inventory for the selling of products. It also includes all information such as historical price, manufacturer & supplier, UOM, minimum inventory, economic order and lead time for the purchasing of products. It allows you to have real-time information of all your sales channels and supply chains on one screen so that you can make timely decisions and take effective actions.



# 3 Procurement Management

**8** All-in-one supports comprehensive supplier management, procurement planning, purchase requisition, purchase order, simple procurement contract, master-sub procurement contract, deliverable inspection and acceptance, received, goods inventory and goods return and credit note management based on the latest technology and allows your suppliers and contractors to closer connect to your business and operations at anywhere at anytime. Using **8** All-in-one, you can request and receive and your suppliers and contractors can generate quotations, sales orders, delivery notices and provide services at anywhere at anytime.

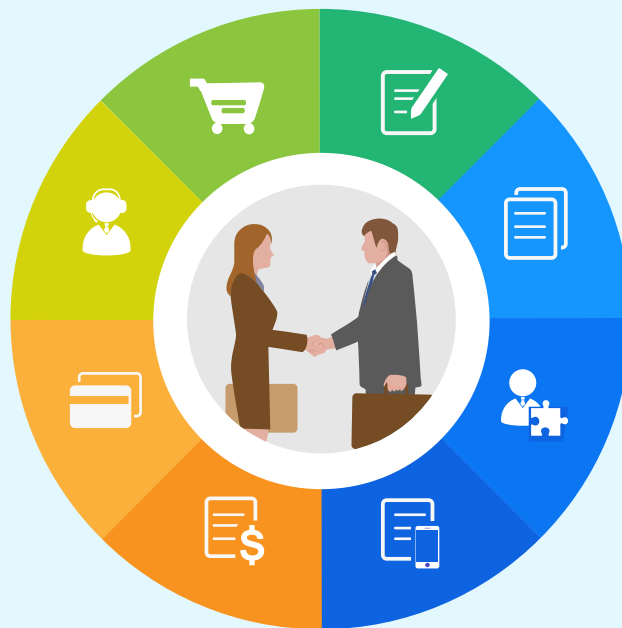


**8** All-in-one, also support outsourcing management and allow you to manage the negotiation, contracting, performance and finance of your outsourcing projects.

## 1、 Supplier Management

One of the crucial steps in supplier management is the ability to locate the best supplier quickly and have complete transaction history to support decision making. **8** Supplier & Procurement Management provides comprehensive supplier information in the following ways:

- Profile information including general information, organization information, contact information, legal information, financial information and credential information
- Products and services offerings
- Interaction records and action items, and opportunities
- Transaction information including revenue records, contract and order information



**8** All-in-one provides qualification management for new suppliers and performance management for existing suppliers. The following information for each supplier is updated and displayed when each transaction occurs:

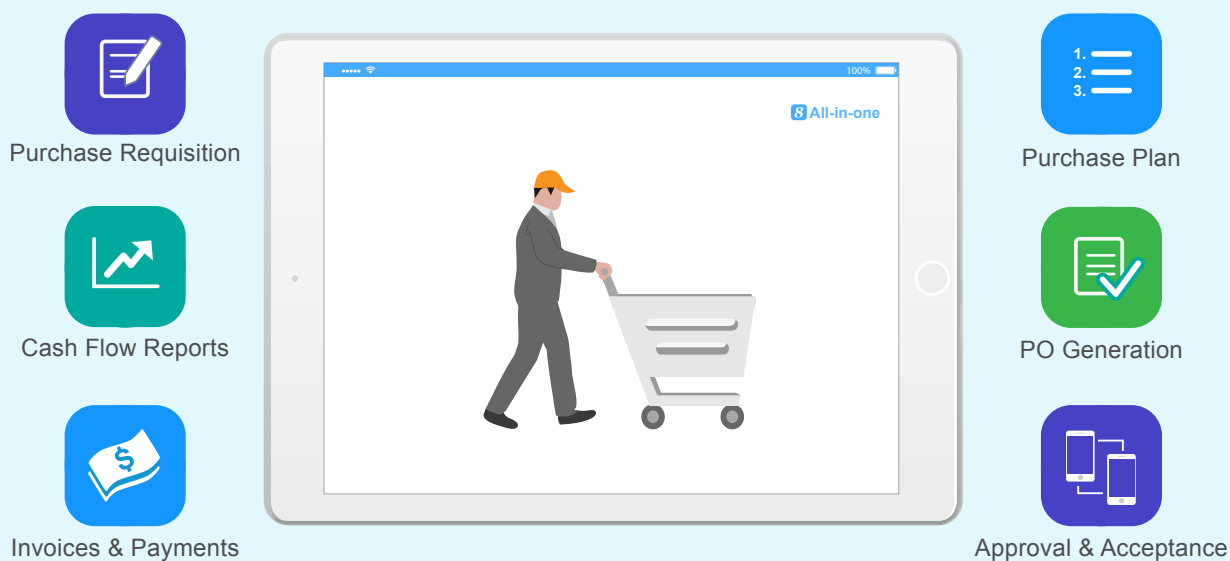
- Derivation from standard price
- Rejection rate
- Late frequency
- Discrepancy in service level

An easy-to-use e-Survey feature is also provided to allow quick solicitation of the opinions of different people in different departments about the performance of a particular supplier and the results will be automatically aggregated.

## 2. Procurement Planning

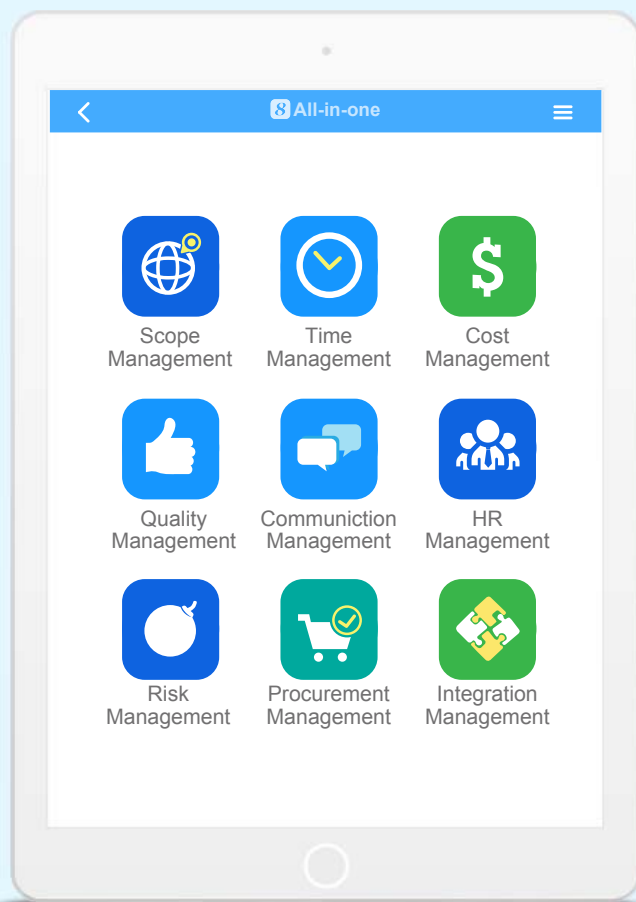
8 All-in-one provides tools for material planning, procurement planning and e-Procurements. Different departments can use the following features to formulate different plans for their different spending categories for :

- Identification of all items that need to be purchased and the ability to link items to a schedule for managing the timing of the purchases
- Integration with the product inventory function to effectively avoid overabundance
- Directly linkage with Purchase Orders to reduce manual input and errors
- Management of fulfillments according to the plan and tracking deviations
- Automatic alerts during the entire purchase planning and execution process



8 All-in-one allows purchase orders to be automatically generated from the purchase plan or manually on the fly. It also manages pick-pack-and-ship, delivery and return as well as keeps track of invoices and payments. The whole process has strong finance connectivity and purchase orders are link to the budget, invoices are linked to account payable and payments are linked to the actual expenditure of the department.

# 4 Project Management



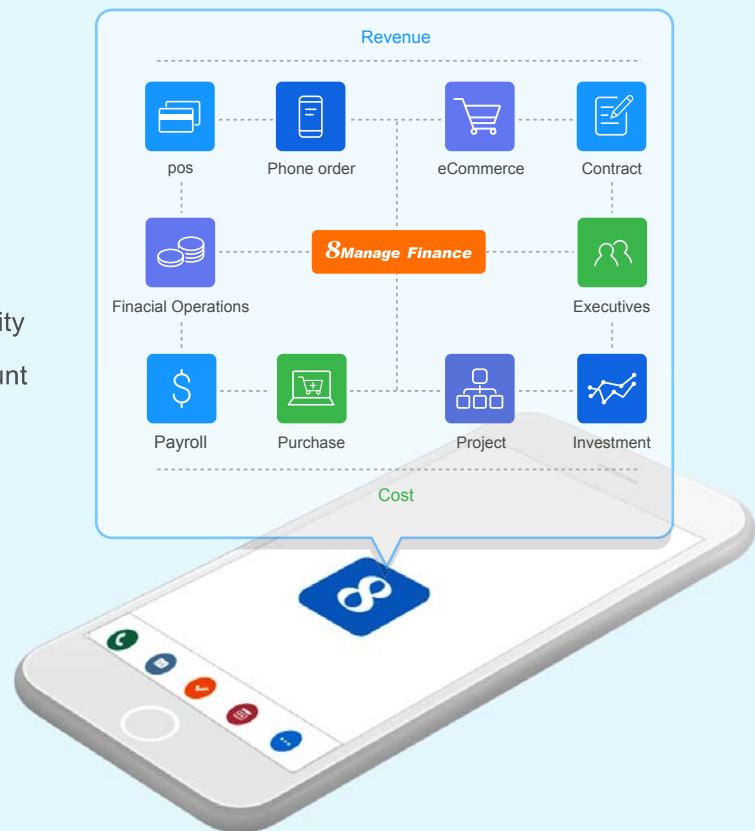
8 All-in-one supports all 9 areas of project management defined in PMI PMBOK® using modern technology on mobile internet. This allows the project manager to view the selective elements (activities, resources, deliverables, dependencies, cost items and change items) of the project on one screen in real-time. This also allows all project team members to view the most up-to-date project plan associated with the latest change and status update in real-time.

The project team members can submit their deliverables anywhere at anytime and activity and project status will be updated automatically in real-time. The biggest benefit of the automatic status update based on deliverable submission isn't saving manual operation to update but the accuracy and timeliness of information for accountability management for the project.

The comprehensiveness of functionality, real-time project information and strong tracking of status and accountability make 8 All-in-one ahead of a lot of project management tools on the market.

# 5 Financial Management

8 All-in-one supports full financial management functionality including budgeting and expensing, asset and liability accounting, account receivable and account payable tracking and financial statement generation (income statement, balance sheet and cash flow statement).

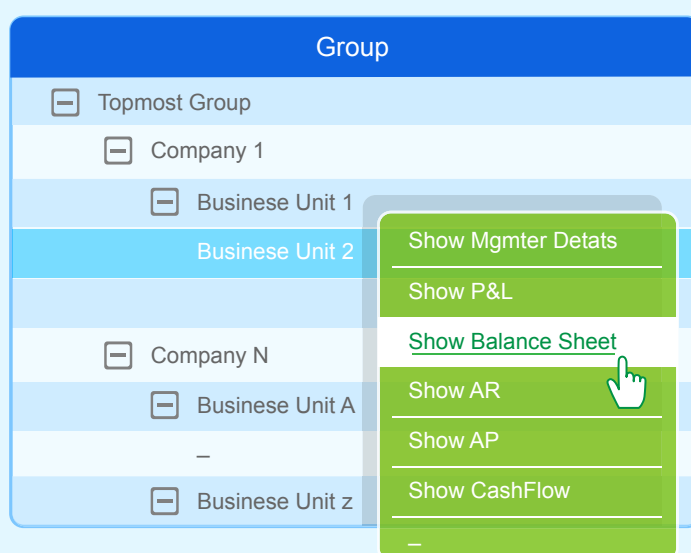


8 All-in-one directly connects to each revenue (POS, phone orders, e-Commerce and contract) and cost (payroll, expense report, purchase, project and investment) transaction and can instantly update income statement, balance sheet, cash flow statement and account receivable and account payable reports.

8 All-in-one can also trace each revenue or cost transaction with its associated campaign, opportunity, sales order, purchase order, contract or project and perform management accounting and allow the business managers to see the cause-and-effect relationship of each business event to the profit & loss, asset & liability and cash flow of the business unit and its lines of business or parent company.

## 1、 Income Statement, Balance Sheet & Cash Flow Report

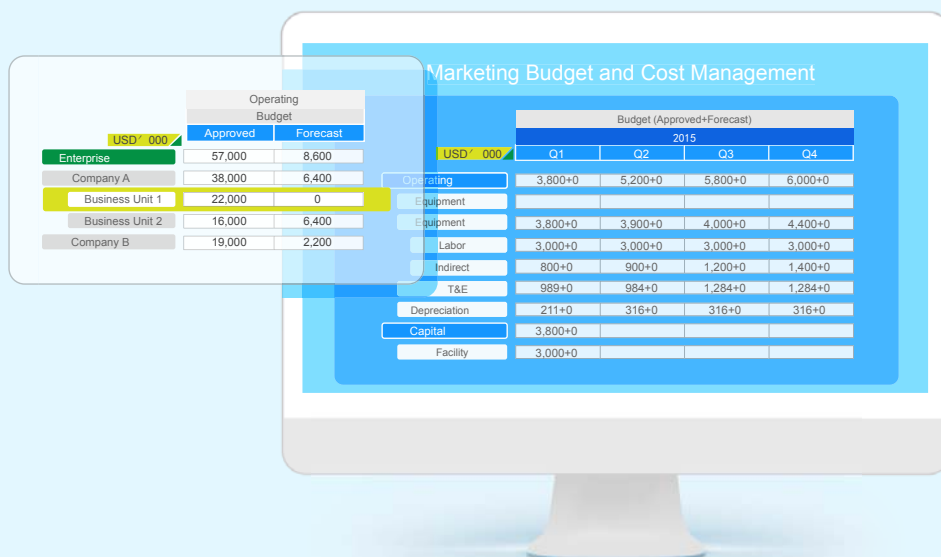
Even low-end PC today has sufficient computing power to generate Income Statement, Balance Sheet, Account Receivable, Account Payable and Cash Flow reports for an enterprise every day or every hour. The only reason that an enterprise cant generate the up-to-date reports every day, week or even month because it lacks financial connectivity in its business and operational processes. The manual interaction model that people accustom to prohibits the financial connectivity even the modern computer hardware and software are geared to provide the level of connectivity needed for agile financial information.



Using the 8 All-in-one Financial Connectivity model, an executive is allowed to view any of the financial reports mentioned above of any organization in real-time. The system will automatically aggregate from lowest organization to the top most organization in real-time and automatically eliminate inter-company transactions at the same time. Besides fast generation of financial information, the system also allow real-time drill down of information.

## 2、 Budget & Expense Management

8 All-in-one provides organizational Revenue & Cost Budgeting & Tracking capabilities to ensure the assembly and dissemination of information across organizational units and legal entities in real-time. An organizational units Revenue and Cost Budgeting and Tracking is linked to its sales orders and contracts, purchase orders, project accounting, staff planning and cost, invoices, expense reports and payments. The budgeted and actual numbers always reflect the latest reality and the user can click through the numbers and view the items compose them in real-time.



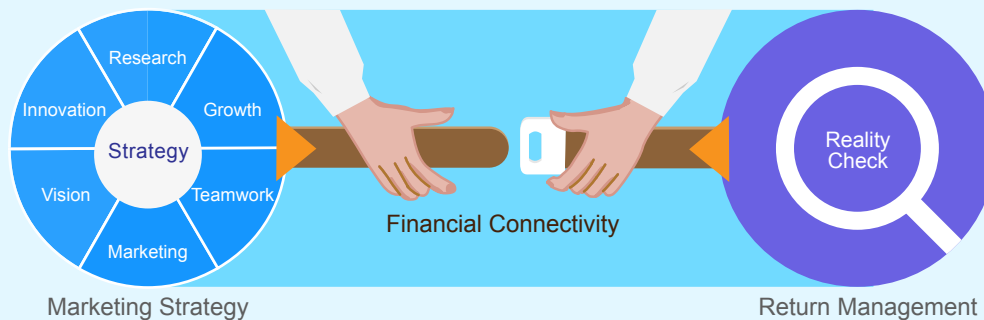
8 All-in-one supports the Total Budget Management concept and allows each line of business to perform its business volume, price and cost estimation based on the structure and granularity of its products, channels, operations and market segments. The budget can be further divided into high, medium and low versions and reforecast can be done each month (1+11, 2+10, 3+9, ... ) after the original budget is done or approved.

### 3. Marketing Financial Management

Marketing strategies should be creative but must have built-in reality checks to guide their execution. Built-in reality checks can include things such as eSurvey and incremental return management.

8 All-in-one embeds financial connectivity in its following marketing management models:

- Marketing budget planning & tracking
- Campaign (including eDM and eSurvey) management
- Marketing return management

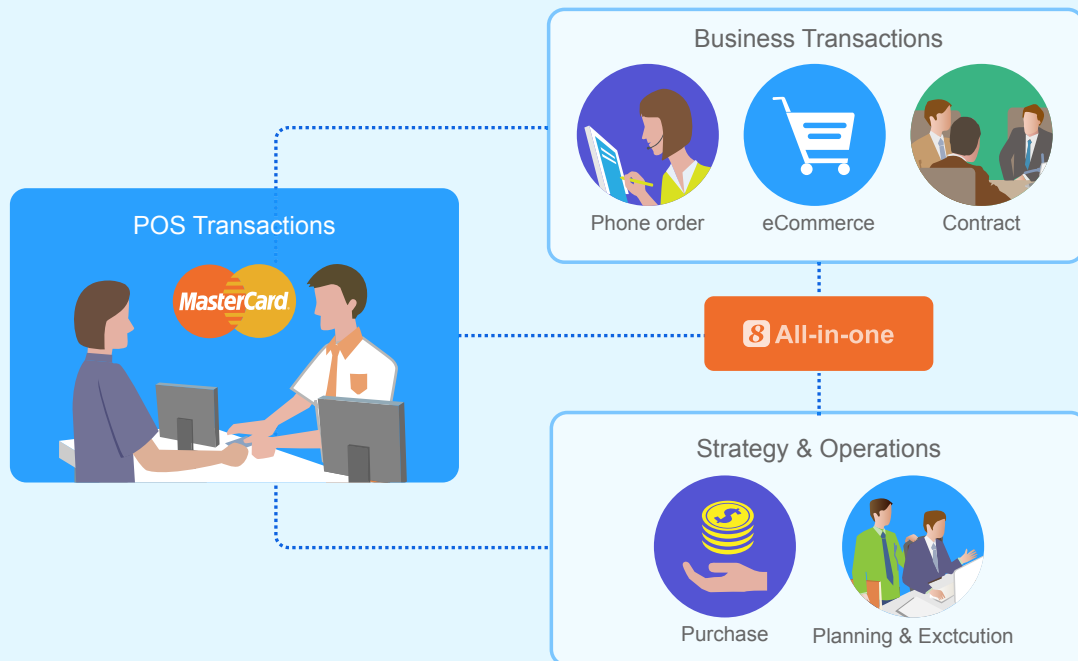


With embedded marketing finance connectivity, 8 All-in-one can help executives and marketing managers to track detailed return in terms of leads, qualified leads, referrals, increased POS transaction amount, new order/contract revenue amount and improved brand name recognition based on before and after e-Surveys.

## 4. Sales Revenue Management

8 All-in-one can establish high connectivity to the real-life sales activities using the following transaction models:

- Retail transactions captured by Point of Sales (POS) systems
- Retail or wholesale transactions captured in sales orders (including phone & e-Commerce orders)
- Retail or wholesales transactions captured in sales contracts



All sales transactions can be captured in real-time and information will be immediately available to financial operations and business departments for planning & execution purposes. The sales transaction information will be automatically linked to the sales finance management practices that the financial operations and business departments have chosen to use such as below:

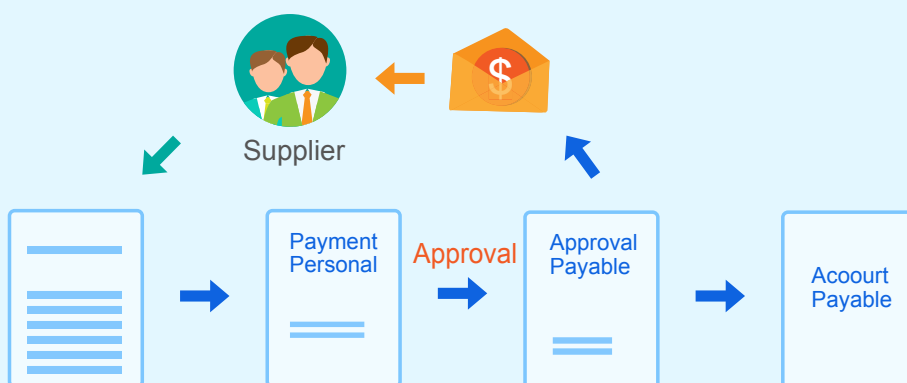
- Revenue planning and quota management by individual group, sector/region and enterprise
- Opportunity finance and pipeline management
- Repeated revenue management

Re-forecasts (e.g., 2+10, 3+9, ... , 11+1) can be automatically done based on the formulas already setup.



## 5、 Invoice & Payment

8 All-in-one allows the user to track invoices received, generate payment requests and obtain the proper approvals. The approved payment requests will be automatically forwarded to the account payable for payments. 8 All-in-one can also generate various accountable payable reports in real-time.



		Total Amount (Past 1 Year)	Not Yet Paid Amount (Past 1 Year)	Status
1 Activegrid Kitchenware	HKD	434,100.00	HKD 300,000.00	●
0 ECL Food Supplier	HKD	279,140.28	HKD 77,979.00	●
0 Eoonmical Food	HKD	23,000.00	HKD 0.00	●
1 Newplan design (shenzhen)Ltd	HKD	60,000.00	HKD 0.00	●
1 PSIG Kitchan Equipment	HKD	20,000.00	HKD 0.00	●
Louis Vuitton	HKD	3,146,514.95	HKD 0.00	●
Chane	HKD	1,473,664.65	HKD 747,625.00	●

8 All-in-one allows the user to track sales order fulfillment statuses, project progresses and contractual payment terms to generate invoices to bill clients. Integration with front-line project management and delivery systems and automated workflow notifications accelerate billing process to improve cash performance across the enterprise.

# 6 HCM

8 All-in-one provides the tools necessary to meet and exceed your immediate HCM needs including Recruitment, Employee Records, Attendance & Utilization, Compensation & Payroll, Benefits, Training & Performance, Leave and Employee Self-services; the automation it provides gives you better efficiency and control. More importantly, 8 All-in-one provides you the framework to manage Group Learning & Information Capital, Structured Collaboration, Process & Execution Discipline and KPI & Commitment Management. With 8 All-in-one, your immediate needs will be met; your core competence will increase; and you will be able to manage and develop your human resources to their fullest potential. All of which will enable you to enjoy long-term competitive advantages.



## 1、 Recruitment Management

8 All-in-one provides a framework for analyzing and planning future human capital based on the organization's business strategies and plans, which also allows the HCM department to communicate with all other departments to assess their needs.



8 All-in-one helps formulate recruiting plans for each department. Hiring managers, HCM managers and recruiters can all see how the recruiting progress compares to the plan. All relevant parties will see the exact same information in real-time.

8 All-in-one provides a recruiting portal to allow departments to post jobs and to allow candidates to submit resumes electronically. It will help each department to build up its resume library, screen candidates and schedule interviews.

## 2、 Employee Record Management

8 All-in-one can capture comprehensive employee information. Flexible user-defined fields and pages are supported to supplement specific information. Different privileges are authorized for employees, managers and HCM staff to real-time update and search employee information.

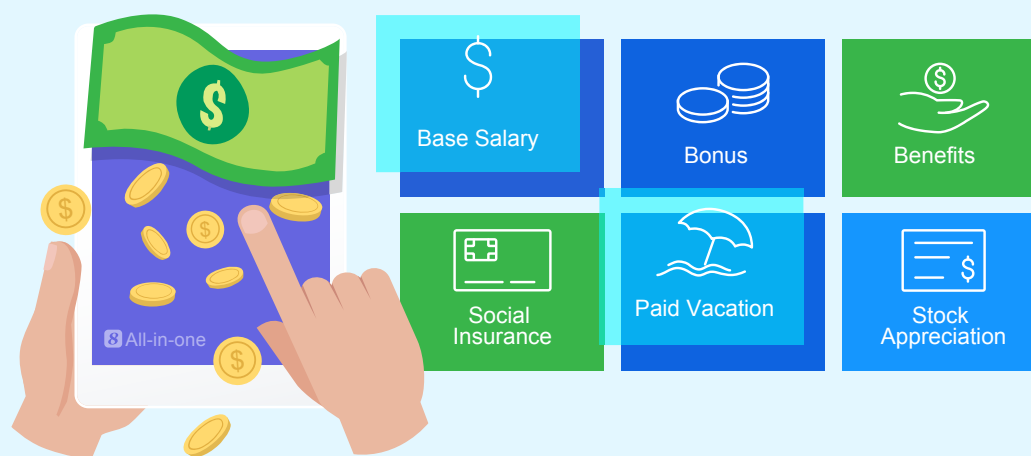


8 All-in-one helps to manage employees' skill set, workload, effectiveness and business values.

For the employee's career development, 8 All-in-one records employees' previous employment information as well as their job functions, remunerations and promotions of their current employment.

### 3. Compensation & Payroll Management

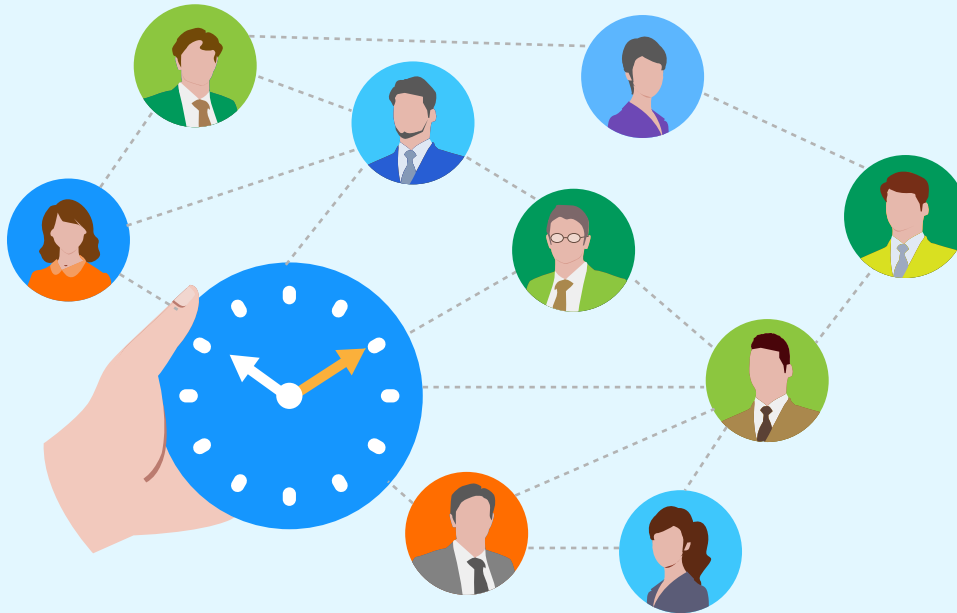
8 All-in-one establishes an overall and automated control mechanism to allow HCM to manage different methods of compensation including user-defining compensation types, automatic calculation for compensation change range and linking with payroll calculation.



8 All-in-one Payroll comes with pre-set payroll settings for immediate use and with visual payroll settings for future modifications. If the labor or tax rules change, the payroll manager is able to change the payroll calculation formulas. The visual payroll settings, version control and the audit trail allow the payroll manager to make changes in the deduction formulas in a controlled setting without the involvement of IT.

## 4. Attendance & Utilization Management

8 All-in-one provides a powerful out-of-the-box timesheet facility to allow the recording and tracking of employee's attendance. It also provides the user with a framework to create a clock-in /out device, if any is necessary in your environment. The attendance data from your clock in/out device can go automatically and directly into the 8 All-in-one database without the risk of human manipulation of the data.



8 All-in-one helps to manage employees' time for operation and project work. Employees' planned workload can be easily seen during resource allocation or at anytime. Resource utilization reports include:

- Resource time and cost
- Program and project resource histogram
- Program and project skill set gaps
- Resource allocation and actual utilization
- Program and project FTE analysis

## 5. Training Management

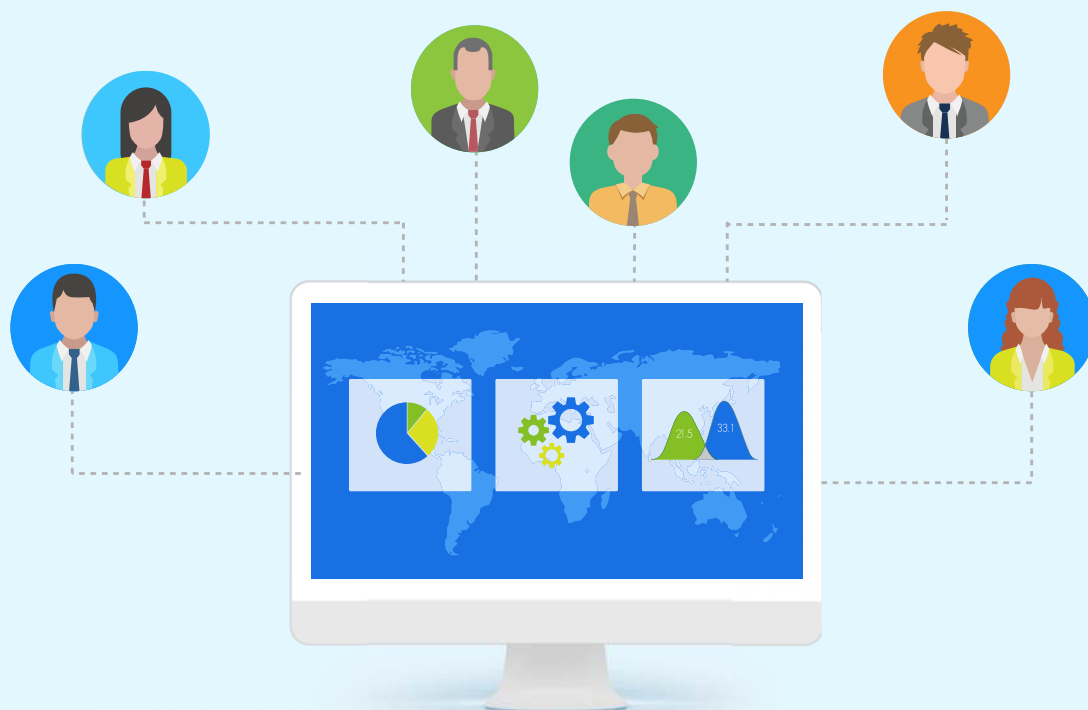
8 All-in-one catalogues employees' skills information, identifies their skill set gaps and develops training and development plans. It helps to manage training requests and approvals, tracks the training activities, costs and results, even links the training results as an object in employee performance.



8 All-in-one also provides a verification mechanism to ensure that the training activities are properly performed and that the training results are truly achieved. After the verification is complete, the employee's skill set information will be updated and the training record will become part of the employee's permanent record.

## 6、 E-learning Management

8 All-in-one E-learning allows your organization to put training courses online and your HR department and your managers to set different categories of employees mandatorily and/or discretionarily to take different online courses for the pre-defined periods.

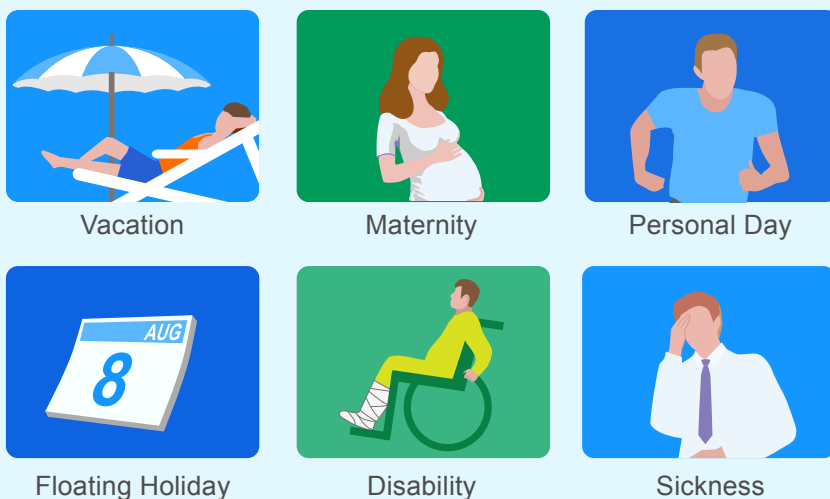


**8** All-in-one E-learning provides your organization the following features:

- E-learning training plan development
- Online exam development
- Employee request for e-learning
- Employee online exam
- Automatic scoring of exam
- Re-exam management
- E-course content management and upload
- Course schedule (to entitled employees) announcement
- Individual e-learning progress management
- Randomly selection of questions from question pool
- Present exam result
- Drop-out management

## 7、 Leave Management

HCM administrator can define and redefine different leave types as needed in **8** All-in-one. Each leave type contains user-defined calculation methods for allocated or accrued amounts, carryover allowance and advance allowance based on corporate levels and/or services time.



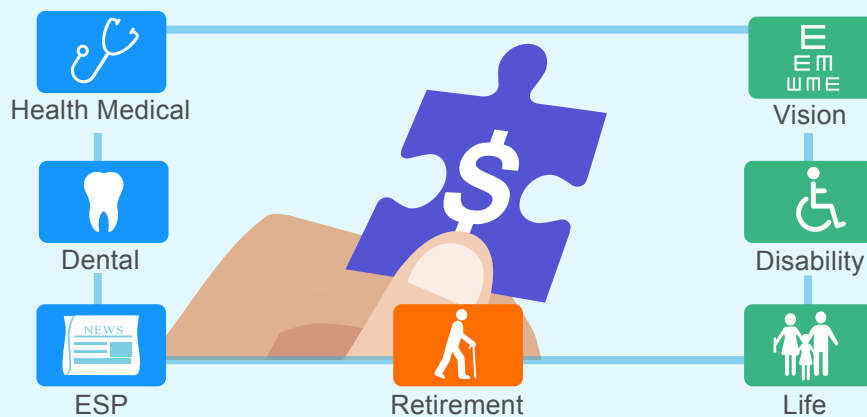
A leave workflow is organized for HCM administrator, employees, and managers. Leave balance information and individual leave calendar are also provided to allow employees to manage their work during their absence.

Various bulk actions is allowed to adjust employee leave data in large quantities. It also provides group leave calendars and leave reports in real-time. HCM and line managers can easily access the most up-to-date leave information in their group at any time.

## 8、 Benefit Management

8 All-in-one provides a framework for managing employee benefit plans, with the ability to handle increasingly complex benefit plans.

The plan manager can define different types of benefit plans for different jurisdictions. User can access the details of benefit plans including pictures and brochures. An estimation tool allows the plan manager to calculate the costs to both the employer and the employee over time.



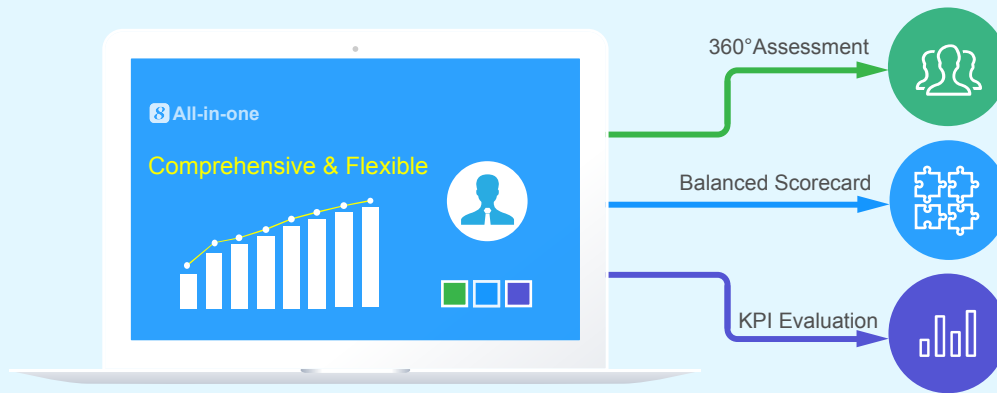
Additionally, its enrollment component allows the plan manager to record enrollment and manage terminations and renewals. The payment section allows the plan manager to record pay-in and pay-out information.

## 9、 Performance Management

8 All-in-one provides a framework for setting performance objectives, incremental measures and feedback and conducting final appraisals. It supports the following major features:

- Management By Objectives (MBO)
- Multiple review cycles
- Automated performance scoring
- Approval flow and verification
- Balance Score Card (BSC)
- Real-time performance feedback
- Single or multi-reviewers or 360 degree review process





8 All-in-one can automatically provide incremental feedback to help both the reviewer and employee see the gap between the objectives and the actual incremental results and develop strategies at the earliest possible time to improve the final results.

## 10、 Employee Self-service Management

8 All-in-one provides a customizable Personal Workbench facility and a My Attention facility to help each employee track work items that require actions.

The E-Calendar are also provided for each employee to plan and follow-up their working schedule.

8 All-in-one provides employees with the following types of self-services:



- Organization Information Lookup
- Expense Report
- E-learning
- Leave Request
- Review Benefits, Leave, Performance and Payroll
- Delegation Management
- Announcement Receipt
- Timesheet Submission
- Training Request
- Benefit Enrollment
- Equipment Request
- Discussion Forum
- Update Employee' s Personal Info

# 7 Office Automation & EDMS



**8** All-in-one has the new generation office automation functionality which automatically connects to CRM, HCM and PM enabling the underlying data to interlink with each other.

**8** All-in-one provides a generic form and user-defined workflow facility to allow users to create different notification and request forms for reviews, comments and approvals. It also provides the Employee Portal for each employee. In the Employee Portal, the employee can access to different facilities such as:

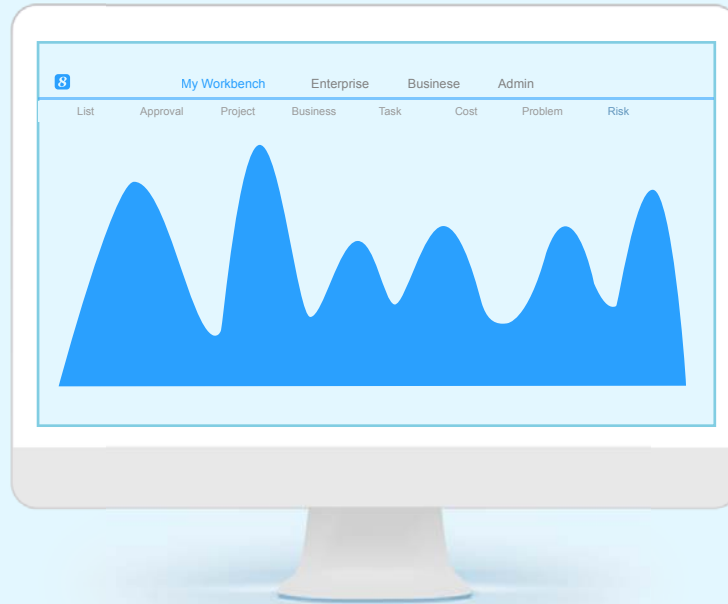
- Office Equipment Request
- Parking Permit Request
- Facility Request
- Award Nomination
- Off Hour Building Entry Request
- Transportation Request
- Book Borrowing & Returning

**8** All-in-one also provides a powerful Electronic Document Management system which supports the following:

- Folder management
- Inter-company approval flow
- Version management
- Full text search
- App-and-browser-based access
- Intra-department & inter-department approval flow
- Document library template
- Concurrent authoring control
- User-defined navigation flow

## 1、 My Attention

**8** All-in-one allows each employee to define his workbench with which he can select real-time display components that are related to his work area.



- [To Define Workbench](#)

**8** All-in-one allows each employee to define his workbench and its components so that they can directly carry out their work in the workbench after log-in.

- [Work Task Assignment, Calendar and Alert](#)

**8** All-in-one allows each employee to assign the task. When the work plan is arranged on the personal e-calendar, the system will accordingly inform you by sending alert or notification to make sure that each task will not be missed.

- [Real-time Assignment Condition \(my subordinates and me\)](#)

**8** All-in-one allows employees to track how the assignment is run by the work calendar in real-time and the supervisor can check how the assignment and performance status of the subordinates.

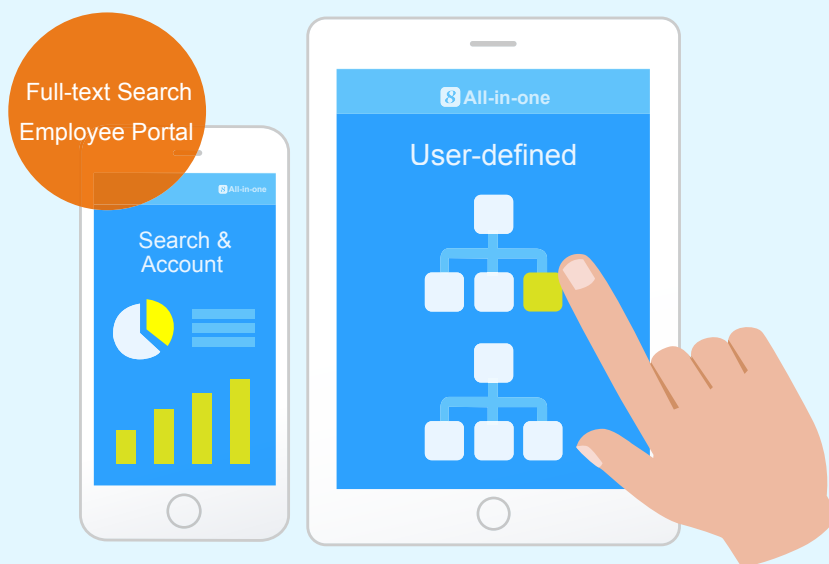
- [Problem Management](#)

**8** All-in-one provides an issue management mechanism, supporting the whole process from employee's raising the issue, accepting the issue assignment, submitting a proposal to resolve the issue to closing the issue. **8** All-in-one has clear issue mgmt steps to promote efficiency and encourage the employees to put up their issues and solve them as soon as possible.

## 2. Form and Flow Management

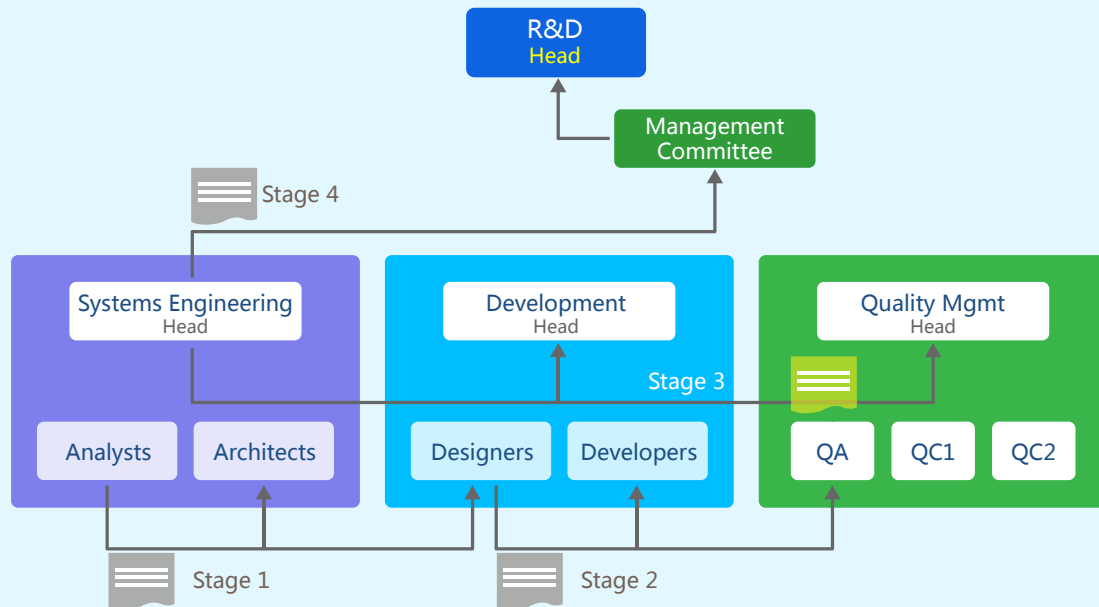
**8** All-in-one provides a Generic Form and User-defined Workflow facility to allow users to create different notification and request forms for reviews, comments and approvals. It also provides the Employee Portal for each employee. In the Employee Portal, the employee can access to different facilities such as:

- Office Equipment Request
- Service Request
- Parking Permit Request
- Facility Request
- Award Nomination
- Office Change Request
- Special Interest Group Registration
- Visitor Registration
- Material Request
- Off Hour Building Entry Request
- Transportation Request
- Book Borrowing & Returning
- Internship Request
- Mail Stop Change Request
- Lost & Found Registration
- Complain & Suggestion



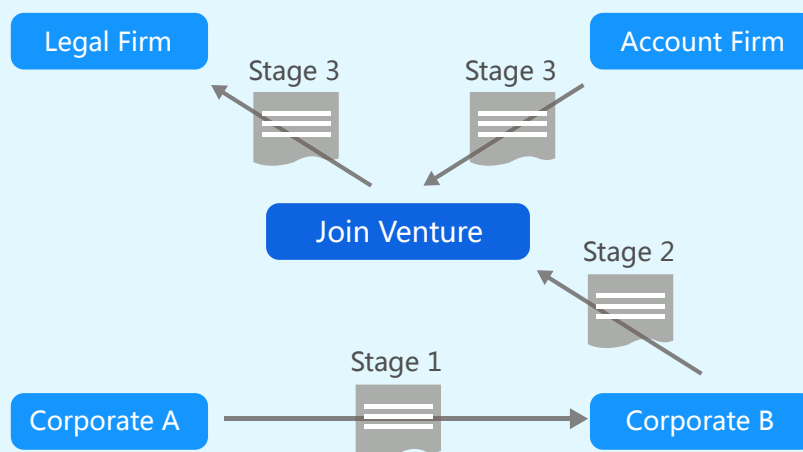
**8** All-in-one also can search and account the form by its type, requestor, and/or request time. All-in-one can also calculate the sum, average, max and min of the form values.

### 3. Intra-department Document Approval Flow



8 All-in-one allows the user to define multi-stage document approval flow and with multiple steps in each stage. 8 All-in-one also allows the user to specify what stages and steps will be executing in parallel and what stages and steps will be executing in serial. The user can also define when an approver rejects the document, the re-approval will start from the beginning or the rejection point.

### 4. Inter-department and Inter-company Document Approval Flow



Similar to the intra-department document approval flow, the user can define inter-department and inter-company document approval flow. Users from different departments and companies can do approval via login, email or smart phone.

## 5、 Document and Knowledge Management

8 All-in-one provides a thorough system to manage documents by putting them in different libraries and files, allowing users to keep files in order and compile them into indices. 8 All-in-one also offers a mechanism for the users to check in, check out and control document versions. This document management system can be used both as a separate module and as a joint one connected with other modules. For example, it allows a connected library to be created automatically when adding a new contract or a new project by relevant policy settings, further continuing to use the same file settings of the pre-defined library templates. Moreover, it supports to instantly move the documents from any contract or any project into a library and the relevant document link of the contract or the project will automatically be updated.



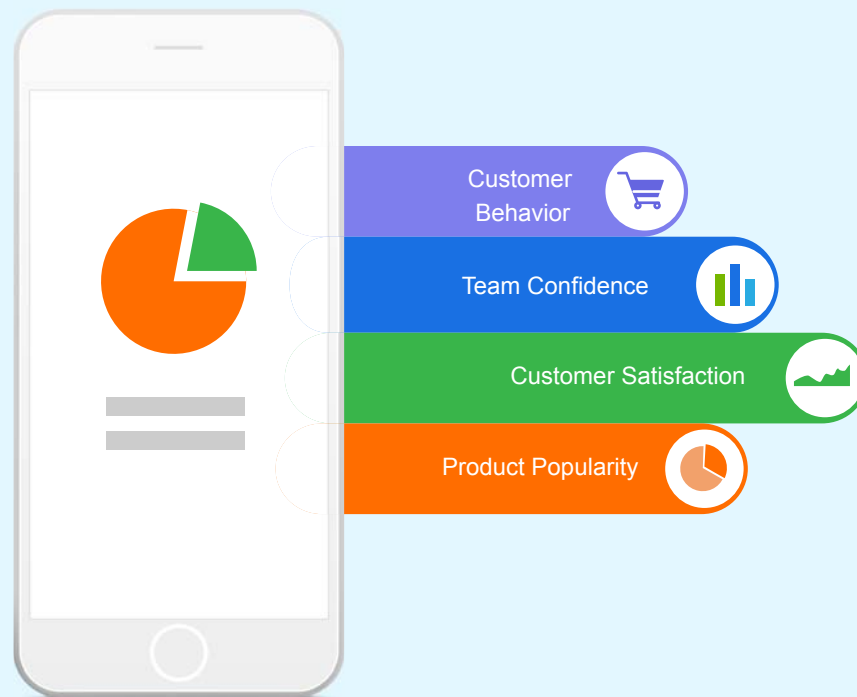
8 All-in-one also supports the function of classifying knowledge, allowing users to compile documents into indices and search for them by knowledge classifications, which can be pre-defined in enterprise policies.

## 6、 Online Survey

8 All-in-one supports customized content and scope of online e-Survey, and to support the automatic analysis and query as well. 8 All-in-one online e-Survey can be used for customer behavior survey, to collect employee comments and the confidence of project members.

8 All-in-one online e-Survey may be used for the following tasks:

- Investigation of customer behavior
- Investigation of customer satisfaction
- To collect feedback of clients on any market activities
- To collect feedback of clients on new products or services
- Collection of employees' views on the (new) management system
- Collection of the annual evaluation on other employees or departments
- Collection of the learning and training needs of employees
- Survey the evaluation of project members on plan completeness and operability
- Survey the confidence of project members on task schedule
- Survey the appraisal of project members on project management



8 All-in-one also provides many other convenient features of online survey , including the maintenance of enterprise survey database, anonymous surveys, repeatability investigation, automatic investigation, investigation of reminder message and so on. These functions help users handle the e-Survey easier.

# All-in-one Feature List

Feature	Description
<b>Client Mgmt</b>	
Client Info	Client profile and contact info.
	Allow the user to define the fields and scoring methods representing the value of the client and the value score for each client will be calculated.
Lead Mgmt	Support quick recording or importing lead info.
	Support auto assignment of leads to sales reps based on pre-defined rules.
	Support public pool for the leads that have been removed from the sales reps and are up for grabs.
	Support user-defined qualification criteria and scoring method.
Conversion Mgmt	Allow to track conversions such as lead to first-time-client.
Abandon & Blacklist Mgmt	Manage the abandoned and blacklist clients.
<b>Campaign Mgmt</b>	
Campaign Planning	Allow the user to specify the campaign basic info such as name, id, type.
	Allow the user to specify the promotion info, including theme and marketing topics.
	Allow to track the investment and return.
	Support pre-defined templates for quick creation of campaign project schedule.
	Support full budget planning and tracking.
	Support user-defined campaign approval flow.
Campaign Preparation	Support the difference campaign execution channels, like Email and SMS.
	Support content mgmt: a) Content template b) Content variation c) Selection of contents for personalization
	Support content editing with HTML, CSS, picture insertion, hyperlink, attachments etc.
	Target audience can be identified by region, industry, interest area, marketing topic.
	Provide sophisticated search mechanism based on fields defined in the categories for the user to identify the massive campaign targets from the database a) General b) Responsible Parties c) Interest d) Value e) Interaction f) Behavioral g) Special info Also, recipient lists in Excel or CVS format can be imported to formulate the target list.
	Support content personalization.
	For eMarketing (email and SMS), both fully automated and manual methods are supported. For the automated execution, the user can pre-set scheduled send time and batches.
	Support to pre-set execution rules to automatically send out customer caring emails/SMS messages on client's important dates such as birthday, anniversary etc.
	Automatic tracking of eMarketing execution results.



Campaign Execution	Multiple campaigns can be executed and tracked in parallel.
	Provide project Mgmt as add-on for campaign project Mgmt and event Mgmt.
	Provide campaign alerts notification, include issue, risk, budget updated, budget overrun, target achievement etc. to remind responsible people of their campaign work.
	Provide real-time business map and dashboards for the executives to view the campaign execution conditions.
	Provide issue and risk records for the marketing team to know about the campaign conditions.
	Able to track the target results and non-target results (side benefits) of the campaign.
	Able to track investment and return in real-time and the user can drill down to view details.
	Able to compare campaign budget and actual cost and generate cost overrun warning in real-time.
	Support Reality Checks and eSurvey questionnaires for the brand popularity, audience's feedback etc.
Campaign Performance Evaluation	Provide real-time budget-vs-actual and cost-benefit & ROI analysis with breakdown by cost classification, channel, subentity, line-of-business, product and responsible person. Also, provide the following detailed reports: a) eDM interim results (e.g., email sent, email opened and email read). b) Other campaign interim results (e.g., visitors, members, leads, opportunities, transactions). c) Campaign final results. d) Campaign status summaries.
<b>Client Opportunity Mgmt</b>	
Opportunity Mgmt	Allow the user to enter the following opportunity info: a) Name and ID b) Description c) Responsible parties d) Client info e) Investment and return f) Schedule g) Priority
	Allow user-define fields for info recording, search and listing.
	Support competition, value proposition, influencer and leverage analysis.
	Support cost budgeting and tracking.
	Support info sharing for team selling.
	Support ROI analysis, competition analysis, automatic GP and GP rate calculation.
	Support management review for prioritization.
	Allow user-defined approval flow.
	Support action plan and assignment tracking.
	Support response to tender management.
	Support real-time progress tracking.
	Provide the following real-time reports: a) Investment attention b) Cost & return c) Expected vs. actual d) Funnel analysis e) Status summaries
	Provide project mgmt as add-on to allow sales project mgmt for large or complex opportunities.
Support generation of sales order or contract from a successful opportunity.	
<b>Client Quotation &amp; Contract Mgmt</b>	
Client Quotation Mgmt	Support quotation management: a) Quotation creation based on info in product master. b) Metrics-based authorization and allow user-defined quotation approval flow based on department/team. c) Track quotations sent to client. d) Allow automatic conversion of quotation to sales contract or order.
	Support quotation print-settings and export to Excel or PDF.

Client Contract Mgmt	<p>Provide contract management for consumer products:</p> <ul style="list-style-type: none"> <li>a) Creation of contracts based on fixed price or time &amp; materials.</li> <li>b) Metrics-based authorization and allow user-defined quotation approval flow based on department/team.</li> <li>c) Provide sophisticated Bill of Material function in contract, such as version definition and comparison, approval flow/stages settings and link with inventory, etc.</li> <li>d) Allow contract payment to be triggered by time or completion of project milestones.</li> <li>e) Support contract renewal or provide contract renewal reminder for manual renewal.</li> </ul>
	<p>Support Service Level Agreement management in contract:</p> <ul style="list-style-type: none"> <li>a) User-defined measurement types.</li> <li>b) Easy definition of target type, reward type and buffer type and penalty type.</li> <li>c) Link with project milestones/user-defined milestones for SLA measures.</li> <li>d) Calculation and monitoring of actual result and gap between target and result.</li> <li>e) Track SLA target &amp; result on one screen.</li> </ul>
	Support user-defined contract template and export to Excel or PDF in a user-defined format.
	Support change approval before allowing to change the contents of an approved contract.
	Support version control in contract.
<b>Revenue Mgmt</b>	
Revenue Pipeline Mgmt	<p>Provide pipeline management to count % of confidence level from sales opportunities:</p> <ul style="list-style-type: none"> <li>a) Tracking of payment received and outstanding invoice based on quarters on one screen.</li> <li>b) Provide drill-down of figures to show details of payment received/outstanding invoices.</li> <li>c) Aggregation of revenue pipeline information to from subgroups to headquarters.</li> <li>d) Out-of-box pipeline display components, including pipeline bar chart and pipeline trend graph.</li> </ul>
Client Invoicing and Payment	<p>Provide convenient invoicing and payment functions:</p> <ul style="list-style-type: none"> <li>a) Generation of invoice based on payment terms.</li> <li>b) Batch handling of invoices to a client/contract.</li> <li>c) Batching handling of payment received from client to settle multiple invoices of a client for different orders/contracts.</li> <li>d) Linkage between invoice and payment.</li> <li>e) Provide invoicing alert based on payment terms.</li> <li>f) Provide detailed tracking report for invoice and payment.</li> </ul>
<b>Client Service Mgmt</b>	
Service Ticket Mgmt	Allow user-defined service types and sub-types.
	Support service ticket basic info such as subject, ID, requestor, use urgency, impact severity and required time.
	Allow clients to submit calls such as questions, inquiries, complaints and incidents to the service desk and allow the service desk to reply and follow up the calls.
	Allow the service desk to find out contract, product, warranty and service level info via product serial # or contract ID provided by clients.
	Allow the service desk to communicate to the client in real-time.
	Allow the service desk to assign the service ticket to the appropriate team based on the service type and allow the responsible team to schedule and assign actions.
	Track actions and acceptance against service level and send out alerts when possible deviation is detected.
	Allow clients to escalate calls to service manager.
	Allow multiple sub service tickets within a service ticket.
<b>Partner Mgmt</b>	
Partner Info	Partner profile and contact info.
Partner Qualification & Approval Mgmt	Manage partner pre-qualification and qualification.
Partner Performance Mgmt	Assess partner performance.
Abandon & Blacklist Mgmt	Manage blacklist of partners.

Partner Contract Mgmt	
Contract Basics	Allow user-defined contract types.
	Support basic contract info (e.g., Responsible parties, dates, cost items, payment terms, renewal).
	Allow to upload the contract attachments.
	Support recording of important interactions with partners related to the contract.
	Support contract budgeting and cost tracking.
	Support the online contract approval flow.
	Support assignments of contract activities.
	Support contract on-hold.
	Support contract version Mgmt.
	Support contract evaluation.
	Support audit trail.
Blanket Contract	Support multiple types (e.g., fixed-price, time-and-material) of blanket contract.
	Support the end-to-end blanket contract process from establishment to fulfillment.
	Auto tracking execution of subcontracts or PO under the blanket contract.
SLA	Allow user-defined Service Level Agreements (SLA) based on pre-defined SLA types.
	Auto real-time tracking of each SLA actual against target.
Partner Invoice and Payment	Able to manage all invoices sent from partner.
	Allow to generate payment request and submit payment request for approval.
	Allow NxM relationship of invoices and payments and auto matching invoices and payments, including partial invoice payment, payment by installments and single payment for multiple invoices.
	Able to track the payment status by different dimensions, such as by invoice age, responsible group, partner, payment currency etc.
	Provide "Assignment" function to assign responsible person to follow up with the payment that needs special attention.
	Allow to search and view transaction records with the partner in the same page under the partner.
Project Request	
Create Project Request	Record project name, project type, requested budget and other info in project requests.
Risk Assessment	Support risk assessment for project requests.
Approval	Support to submit project requests for approval.
Linked to a Project	Support to link an approved project request with a project.
Project Initialization	
Create Project	Allow to create project by different methods, such as creating from the template, importing from mpp file, creating from scratch or copying an existing project.
Define Project Team	Allow to define project planners, project sponsors, project supervisors, managers, project assistants and approvers and grant appropriate privileges.
Define Project Chapter	Allow to define info such as objectives, stakeholders, assumptions, approaches, high-level scope, high-level schedule and budget ballpark in project charter.
Project Scope Document Mgmt	Support the uploading and easy access of scope-related documents.

Project Library	Support user-define library template for creating a new project library.
	Support auto creation of project library when a new project is created.
	Support linkages of project deliverables to documents in project library so that documents created from a project can be accessed from project library.
	Support knowledge mgmt in project library.
<b>Project Planning</b>	
<b>Detailed Project WBS</b>	
WBS Operation	The form of 8thManage WBS is similar to Excel format, in which users can re-arrange the activity sequence, outdent or indent an activity by mouse or shortcuts. The system also supports the import and export of MS project files.
Assign Activity Reps	Able to assign the responsible person of the activities or by bulk replace;
	Allow multiple persons to be responsible for the same activity.
Set Up Deliverables	Allow to define deliverables details of activities/projects, including responsible person, scheduled FD, review and acceptance flow, quality standard etc.
Planning Methods	Support "top-down" and "bottom-up" planning methods; by combination of the two methods.
Sub-projects	A project can be inserted as an activity to another project's WBS.
Critical Path	Critical path activities are displayed on WBS and 8Manage supports showing real-time critical path on web page and exporting PDF document.
Gantt Chart	Able to show the Gantt Chart in real-time and allow exporting it into PDF.
Baseline	Support the establishment of baselines for projects and individual activities.
<b>Resource Plan</b>	
Resource Type	Allow self-defining the resource type such as internal human resources, external human resources, and non-human resources for the projects; allow self-defining the resources properties.
Resource Working Calendar	Allow defining different working calendars; each project and each resource can have different working calendars.
Key Resource Warning	Conflict or overloading of key resources will be alerted.
External Human Resources	Able to manage the external human resources that participate in the projects.
Resource Skills	Able to self-define needed fields to record all the skills of the resources.
Resource Plotter	The system will list the matched resources that meet the requirements based on resource plotter.
Resource Workload Warning	The workload of a resource can be tracked during resource planning process and any overload can be detected and alerted by the system.
Resource Allocation	Support resource tracking and adjustment request on resource allocation according to the resource's usage.
<b>Deliverable Plan &amp; Quality Definition</b>	
Deliverable Review & Acceptance	Allow to define different review and acceptance flow for deliverables.
Minimum Quality Requirement of Deliverables	Support setting the minimum level of quality control for deliverables on Enterprise/PMO/Project level.
Minimum Quality Requirement of Milestones	Support setting the minimum level of quality control for milestones on Enterprise/PMO/Project level.
Deliverable Completion Methods	Allow to set up metrics to evaluate the quality of the deliverables.
	Support to set up the calculate methods of the completion rate according to the target value and the actual value of the metrics, or according to the review and acceptance status.
<b>Project Budget Plan</b>	
Approved Budget + Additional Forecast & Actual+Accrual	"Approved Budget + Additional Forecast" reflects the approved amount and the estimated amount acknowledged by the executives; "Actual+Accrual" reflects the actual amount and the amount estimated by the project team members. Their differences can provide overrun warnings.

Cost Control Rules	Allow to control the project cost in different cost classification levels and set up conditions when projects or cost should be (re)approved.
Cost Classifications	Allow to self-define different cost classifications by enterprise level, PMO level or by each project.
Reserve Fund	Support managing the reserve fund of the project.
Asset Depreciation	Support managing the asset depreciation of the project.
<b>Dependencies Plan</b>	
Dependency Between Activities	Predecessor reflects the execution sequence between activities; dependency reflects the logics between activities.
Dependency Between Projects	The hypotaxis relation between projects is reflected by parent & children projects; the logic relation between projects is reflected by dependency (the launch of one project depends on the completion of deliverables of another project), which can provide time and quality management.
Dependency Between Activity and Deliverable	Allow the activity to depend on the deliverables of other activities or projects.
Dependency Between Deliverables	Allow to define the dependencies between deliverables.
<b>Project Approval</b>	
Multi-level Approval	Support multi-level approval function (e.g. allow project manager to approve top-level activities, project approvers to approve whole project plans).
Self-defined Approval Flow	Project approval flow can be pre-defined in the system or confirmed by the project manager when the project is submitted for approval.
Re-approval Restriction	Allow to define there-approval control parameters; when some critical goal was changed, such as the cost, scheduled FD etc., the system will require the project to be re-approved.
<b>Project Execution</b>	
<b>Deliverable Mgmt</b>	
Internal Review	Deliverable's responsible person submits the deliverable for internal review; Reviewer reviews the deliverable.
Acceptance	The accepter can accept or reject the deliverables after receiving the deliverables.
Commitment Mgmt	Allow the commitment management of the deliverables; the commitment process includes commitment-implementation/re-negotiation/commitment breaking.
Unreasonable Dependencies Mgmt	The system will automatically check and reflect the unreasonable dependencies between deliverables, or between deliverables and activities or projects.
Deliverable Structure	Allow to define deliverable structure through defining the components of deliverables.
Deliverable Completion Feedback	Allow setting up target value of the metrics to evaluate the deliverables.
	The responsible can update the actual value, and the system will calculate the completion rate according to the target value and the actual value of the metrics, or according to the review and acceptance status.
<b>Resource Utilization</b>	
Timesheet	Team members can use the timesheet to record their actual working hours in each project.
Resource Request & Approval	Support the resource request and approval process.
Resource Usage Record	Able to generate the usage record according to the actual timesheet records, able to calculate the project resource costs automatically.
Resource Tracking	Resource tacking feature supports tracing the resource usage in a project and detecting any overload and resource conflict.
Commitment Mgmt	Allow the commitment management of the resource allocations; the commitment process includes commitment-implementation/re-negotiation/commitment breaking.
<b>Cost Mgmt</b>	
Expense	The system supports the expense flow management from request to payment delivery.
Cost Classifications	The project can inherit the cost classifications of the PMO or enterprise, or adjust the inherited classifications to maintain its own one.

Budget & Actual Cost	Able to track the derivations between the planned budget and the real cost; able to provide warnings according to the pre-set cost warning rules.
<b>Communication Mgmt</b>	
Requests & Responses (Approval, Review, Acceptance)	When the user raises a request, the user being requested (such as the approver) will be able to receive and respond to it to achieve the purpose of interactions.
Notifications	When the plans are modified, or deliverables are reverted etc., the system will send out notifications (the rules can be self-defined by the user).
	The system will also send out notifications to the responsible persons before the due day.
Escalations	Support to escalate to the leaders if the pending requests are not being handled in due time.
Chat & Forum	Provide online chats and forums for instant communications.
Instant Comments & Emails	Allow team members to add comments for the projects, activities, deliverables, issues etc. online or via email at the same time.
	All the communications including the emails will be captured into the system by time sequences.
	Relevant team members will be able to keep track of the historical communication records when needed.
<b>Change Request Mgmt</b>	
Change Request	Allow users to record and handle the change request in the system.
Severity & Urgency Queue	Allow to define the severity of the change requests, provide urgency queue function to manage the change requests and to control the access rights.
Audit Trail	Provide audit trail to record all the changes of the change requests.
Self-define Function	Allow privileged user to self-define the basic information page and management flow of the CR.
<b>Purchasing Mgmt</b>	
Purchase Order	Support the entire procurement process, including raising the PO for approval, record the invoices received from the partners, payment requests and approval etc.
Received Invoice	
Payment Request	
<b>Requirement Mgmt</b>	
Requirement	Allow users to record and handle project and product requirements in the system.
Severity & Urgency Queue	Allow to define the severity of the requirements, provide urgency queue function for requirement management and to control the access rights.
Audit Trail	Provide audit trail to record all the changes of the requirements.
<b>Test Case Mgmt</b>	
Test Case	Allow users to record and handle test cases and upload related test files.
<b>Team Building</b>	
Project Work Performance Report	Provide various real-time project analysis reports as a reference during the executions, such as workload summary, quality summary, milestone completion status summary etc.
Reality Checks	Provide reality check functions to collect the comments from the project stakeholders and allow to answer the questions anonymously.
<b>Project Monitoring</b>	
<b>Cost Monitoring</b>	
Earned Value	Use the EVM management method recommended by the PMBOK to monitor the project cost.
Top-down & Bottom-up Budget Deviations	The system will monitor the deviations between the top-down and bottom-up budgets dynamically and by real-time.
Cost Overrun	The system will monitor the cost overrunning the approved budget in real-time.
Budget Re-approval	With pre-set rules, when budget being modified, it will automatically trigger the restriction to re-approve the project.

<b>Progress Monitoring</b>	
Dashboard & Warning	Provide project summary dashboard and the alert functions.
Earned Value	Use the EVM management method recommended by the PMBOK to monitor the project schedule.
<b>Quality Monitoring</b>	
Quality Monitoring	The system will keep track of the project quality by examining the following: uncommitted deliverables, overdue deliverables, deliverables without review and acceptance, rejected deliverables, deliverables with a high rejection rate, the most overdue deliverable etc.
<b>Resource Monitoring</b>	
Resource Overall Monitoring	The system will monitor the overall resource conditions, including overdue resources, overloaded resources, to-be-hired resources, un-committed resources etc.
Resource Effort Analysis Histogram	The system provides resource effort analysis histogram to analyze the total FTE, resource days or resource hours of the planned, requested, approved or actual resources usage.
Resource Effort Analysis Table	The system provide the analysis report to view and compare the FTE, resource days, resource hours of the total resource usage, the resource constraint and the variances.
Different Resource Reports	The system provides different resource reports to help monitoring the resource in different dimensions, e.g. the resource planning report, resource time & cost report, resource allocation & utilization report etc.
<b>Risks &amp; Issue Monitoring</b>	
Risk Detection	Auto detection of the resource risk, schedule risk, cost risk, management risk etc. and demonstrates the risks in the project dashboard.
Risk Mgmt	Besides from the auto detection of the risk, the system also allows the user to record and monitor the risks found.
	The system supports to plan actions to deal with, reduce or avoid the risk, and supports the whole follow-up process until the risk is relieved or closed.
Issue Handling	Support to keep track of the whole process of dealing with the issues found; including the issue registration, the impact analysis, the actions, actions follow-ups, issues solved and closed.
<b>Library &amp; Knowledge Classifications Mgmt</b>	
<b>Document Library Mgmt</b>	
Library Template	Support the creation of document library templates and the creation of document libraries based on a particular template.
Auto-creation of Project Library	Support creating a new document library when a new project is created. It also supports creating a project document library from template.
Document Version	Provide document version management, able to keep track of all the historical versions.
Access Rights Control	Allow different stakeholders and users to have different access rights; able to grant the rights by library, by specific folders or specific documents.
	Provide check-in and check-out controls to avoid concurrent write into the same version of the document.
	All the view, modification, download, check-out actions etc. will be recorded in the access logs.
Document Searching	Allow to search and view the documents by names, knowledge classifications, key words or full-text;
	Allow to search and track documents of different formats including word, excel, pot, pdf., etc.
Document Flow	Support user-defined document forms and allows the current user to fill in and submit documents of different types for approval.
Full-text Search Dictionary	Allow to define key words as full-text search rule.
<b>Knowledge Classification Mgmt</b>	
Knowledge Classification	Allow the user to self-define knowledge classifications.
Document Searching	Allow the linkage of each document to multiple knowledge areas and provides a powerful knowledge-based search facility.
Deliverable Searching	Allow the linkage of each deliverable to multiple knowledge areas and provides a powerful knowledge-based search facility.

<b>Configurations and Integrations Mgmt. (SVN/CVS)</b>	
Configurations and Integrations Mgmt	Built-in function to integrate with SVN/CVS for instant usage.
<b>Risk &amp; Issue Mgmt</b>	
<b>Risk Management</b>	
Existing Risk Analysis	Support the identification of existing risks and the analysis of the confidence level of them before the project start.
Risk Mgmt	The system allows project team members identify, assess, prioritize and record risks and the formulate actions for managing them. The system also records the probability and influence before and after the action to ensure the effectiveness of the actions.
Risk Detection and Reminding	Auto detection of project resource risks, schedule risks, cost risks and management risks and provides extrapolative forecasts to warn people on the systemic risks.
<b>Issue Mgmt</b>	
Issue Recording	Allow to record issue for different levels and objects, such as dependency, deliverable, activity, sub-project, project and PMO.
Issue Linkage	Allow an issue to be associated with a risk and its resolution actions associated with change requests.
Change Tracking	The system will track the impact changes of the issue.
Actions Tracking	The system will track the actions to solve the issue.
Issue Map & Warnings	Provide an real-time issue map for the monitoring and visibility purposes and a automatic alert function for the actions associated with issues.
<b>Re-forecast &amp; Investment Attention</b>	
<b>Re-forecasting Mgmt.</b>	
Schedule Re-forecasting	8thManage supports schedule re-forecasting based on Schedule Performance Index (SPI), present date and mandatory dependencies.
Resources(Efforts)Re-forecasting	Allow to re-forecast the resources(efforts) according to the re-forecasted schedule and the extra resources requests.
Cost Re-forecasting	Allow to re-forecast the cost budget according to the actual cost (AC) and the bottom-up budget cost.
<b>Investment Attention</b>	
Bubble	Present multi-dimensional view of projects in the form of bubbles, supporting analysis of projects, project requests pending approval, project requests and projects. Users can set the indicators represented by the horizontal axis, vertical axis, bubble size and bubble color. The main indicators include project type, priority, expected return on investment and risk (percentage of confidence in overcoming risk).
Rank	Support to view performance scoring for each project, including system scores calculated by the system based on the set project traffic light scores, as well as scores manually filled in by management.
<b>Bill of Material Mgmt</b>	
Bill of Material	Allow to record bills of material. Materials can be products defined or not defined in the Product List, can be selected from Major Material Category, or imported through Excel.
Material Cost & Quote	Support to record cost and quote of each material, and automatically calculate the total cost and the total quote.
Approval & Change Mgmt	Support the approval of the bill of materials, and the changed bill shall be re-approved.
Version	The approved bill of materials will automatically generate a version, and the two versions can be compared in terms of the material composition and costs.
Inventory Request	Allow to generate an inventory request from a bill of material.
Inventory Return	Allow to return materials to inventory.
Purchase Request	Allow to generate a purchase request from a bill of material.
Purchase Order	Allow to generate a purchase order from a bill of material.



Project Close	
Project Close	Support to complete and close the project in the system.
Deliverable Documents Mgmt	Allow to move all the attachments of the deliverables into specific project folders in the project library.
Resources Release	Allow to release all the requested resources after closing the project.
Project Documents Mgmt	Allow to move all the project documents into the project library for better managing and archiving.
PMO	
Add PMO	Allow to create PMO and submit for approval.
Create Project in PMO	Allow to create project in PMO including to add new project from template, from mpp file and choose from existing projects.
	Allow user to manage projects through PMO.
Set PMO Policy	Allow to set PMO policy including critical success factor, cost policy, project and PMO approval, policy, quality policy, resource policy, earned value, timesheet & resource, and reality check.
SLA & Measure	Allow to use Service Level Agreement(SLA) and add measure types in PMO.
Project Supervision & Control	Allow to check project status, project scope and budget, project approval info: opportunity, stakeholder, critical success factor, schedule control, quality control, resource control, cost control, scope and change request, and value earned.
Issue & Risk Management	Allow to add PMO issues and PMO risk management.
Performance Evaluation	Allow to evaluate employee performance (trail resource, commitment, timesheet), project performance (critical success factor, project status trail),and PMO performance (SLA, SLA result).
PMO Dashboard	Allow to check cost, project phase, resource, deliverable, milestone, change request, issue, risk dashboard.
Cost	Allow to manage budge, purchase order, invoice received, payment and expense report.
Virtual PMO	
Create Virtual PMO	Allow to create virtual PMO.
Add Project	Allow to trail and supervise projects that scoped by user through virtual PMO.
Set Privilege	Allow to set privileges to view or modify virtual PMO.
Trail Project	Allow to trail and control projects that contain in virtual PMO.
Virtual PMO Dashboard	Allow to view cost, phase info, resource, deliverable, risk, schedule report, milestone, key measure and investment point.
Milestone	Allow to show milestone of project in virtual PMO.
Change Request	Allow to trail change request in virtual PMO.
Issue	Allow to trail issues in virtual PMO.
Resource	Allow to check resource in virtual PMO and trail skills and resource report of project.
Other	Allow to check issue, project scope, legal business, audit trail and search in virtual PMO.
Scrum Project Mgmt	
Requirement & Story Point	Allow to handle ideas and requirements on the story book page, which includes recording responsible person and number of story points.
Sprint & Activity	Allow to record sprints and related activities and to add cover pictures for each activity.
Meeting	Allow to record meetings including planning, daily and retrospective meetings.
Progress Monitoring	Allow to check and update sprint progress by dragging activities from one status column to another.
Burn Down Chart	Allow to check three types of burn down charts.
Acceptance	Allow to check acceptance of activities, requirements and sprints.

Supplier Mgmt	
Info Mgmt	Support to record basic info of suppliers, such as region, industry, type, grade, product, status, etc.
	Support to manage suppliers' organization charts and contact info.
	Support to record communications with suppliers.
	Support self-defined fields on the supplier page.
On-boarding Approval	Support self-defined appraisal criteria for supplier on-boarding .
	Support self-defined workflows for supplier on-boarding approval.
Performance Appraisal	Support performance appraisal for a supplier or suppliers.
	Allow to score and approve based on supplier performance appraisal metrics.
	Support supplier classification by grade.
	Support supplier blacklists.
	Support flexible definition of questionnaire content.
Risk identification	Support to connect TianYanCha business search platform to access suppliers' credit information.
Purchase Demand Mgmt	
Purchase Demand	Support online filling and approval of procurement demands.
	Support setting purchasers by product type, who can generate purchase requests based on the approved purchase demand's products.
	Supports associating products of approved purchase demands with purchase requests.
e-Quote Mgmt	
e-Quote Basics	Support to record basic info of e-Quote requests, such as name, responsible person, responsible group and product.
	Support one or more rounds of e-Quote requests to multiple suppliers.
	Support to set start and end dates of e-Quote requests which automatically start after the settings.
	Support association between e-Quote and purchase requests .
	Support price ranking according to supplier quote info.
	Support quote approval.
	Support to generate purchase orders after price comparison is completed.
Auction Mgmt	
Auction Basics	Support to record the basic auction info, such as name, type, responsible person, responsible group.
	Support to set start and end dates of auctions.
	Support to associate auctions with purchase requests.
	Support invitation and the system automatically screen suppliers for auctions.
	Support price ranking according to supplier quote info.
	Support suppliers to quote in multiple rounds of auctions.
	Support flexible definition of rules in the auction process.
	Support auction result approval.

Purchase Request & Request Mgmt	
Purchase Request & Request Basics	Support online submission and approval of the procurement requests.
	Allow to define different approval flows according to groups, cost levels etc.
	Auto check of procurement budget when submitting a procurement request.
	Able to assign procurement responsible person after the procurement request is approved.
	Allow to raise purchase request for products with info is already in Item Master and also for one-time purchase products with info entered on the fly.
	Able to fetch effective quotations of a desired product.
	Support quick-quote-request function.
	Track for the procurement execution results of Purchase Request.
Quotation & e-Quote Process	Allow suppliers to quote online.
	Able to rank offers by quoted price.
	Support quotation approval.
	Allow to generate PO directly from the Purchase Plan or Purchase Request.
Standing Offer Mgmt	Auto reminding and generating product price inquires to suppliers according to different standing offer cycles.
	Support to convert standing offers to quotations and auto putting them in Quotation Master.
Tender Mgmt	
Tender Basic Process Mgmt	Support different tender rules and flows based on user-defined tender natures.
	Support different open tender, invitation tender (further subdivided into RFI, RFQ and RFP) and reverse auction tender types.
	Support additional rules settings such as supplier responses restrictions, tender files privilege control etc.
	Support tender approval flow mgmt.
	Support supplier selection (shortlist), document preparation, invitation, confirmation and issuing.
	Support the Mgmt of fairness and transparency of Q&A information between tenderer and suppliers.
	Allow suppliers to response and submit their bidding materials online and offline in a control manner.
	Support qualifying responses.
	Allow to pre-define different tender evaluation criteria and auto scoring and ranking of suppliers according to the evaluation criteria.
	Support the recording of the of the final selection criteria, scoring and result.
	Support the online announcement of the final selection result.
Able to monitor the tender process and status in real-time and alert people according to the pre-set alert criteria.	
Experts Pool	Support user-define the expert types and experts of each type.
	Allow to assign different types of experts to different tender activities.
	Support maintenance of tender expert pool.

Purchase Order Mgmt	
Purchase Order (PO) Basics	Support to generate PO directly from the purchase request.
	Support user-defined PO approval flow.
	Support PO approval via mobile apps.
	Able to retrieve the agreed upon price from the quotations and blanket contracts.
	Auto comparison of the purchase price with the benchmark price in real-time and generating derivation alert.
	Support user-defined payment terms and goods delivery arrangements.
	Provide procurement cost overrun alert.
	Allow supplier to confirm PO and provide delivery info on line.
Goods Receipt	Allow to set rules for free quantity and under and over delivery.
	Push goods receipt notifications to the dashboard of the responsible person.
	Allow to receive the goods partially or exceedingly.
	Allow to receive free quantities.
	Support quality inspection process.
	Support goods return process.
	Support auto conversion of the goods received units to the inventory units before putting the goods in warehouse.
	Able to track down goods receipt status.
	Support quick supplier performance evaluation immediately after inspecting the received goods.
Quality Inspection	Support user-defined quality inspection template.
	Support goods quality control process.
	Support recording of inspection results.
Procurement Contract Mgmt	
Contract Basics	Allow user-defined contract types.
	Support basic contract info (e.g., Responsible parties, dates, cost items, payment terms, renewal)
	Allow to upload the contract attachments.
	Support recording of important interactions with suppliers related to the contract.
	Support contract budgeting and cost tracking
	Support the online contract approval flow.
	Support assignments of contract activities.
	Support contract on-hold.
	Support contract version Mgmt.
	Support contract evaluation.
	Support audit trail.
Blanket Contract	Support multiple types (e.g., fixed-price, time-and-material) of blanket contract.
	Support the end-to-end blanket contract process from establishment to fulfillment.
	Auto tracking execution of subcontracts or PO under the blanket contract.
SLA	Allow user-defined Service Level Agreements (SLA) based on pre-defined SLA types.
	Auto real-time tracking of each SLA actual against target.

Product Mgmt	
Info Mgmt	Able to store and maintain product info such as product family, product name, product ID, product supplier, product price etc. in Item Master.
Price & History	Add user-defined fields in the product basic info page.
	Support role-based product info access privilege control.
	Auto summary of product unit cost, total cost etc.
	Able to collect all the historical purchase records.
Benchmark Price	Auto calculation of the procurement benchmark price based on the minimum/average historical prices in quotations/PO.
Admittance Approval	Support product admittance approval flow.
Inventory Mgmt	
Warehouse Mgmt	Support warehouse location, storage type, partition and space definition.
	Support product inventory quantity, balance and outstanding requests for each item by warehouse.
	Support entering/exiting warehouse by warehouse location, storage type, partition and size (space).
Inventory Mgmt	Support different kinds of auto inventory adjustments including inventory increment or decrement by PO and manual adjustments. The system will record all the changes in real-time and provide instant updating of the inventory info.
	Support request from inventory, receive from inventory and return to inventory Mgmt.
Stock Transfer	Support pre-defined stock transfer strategy (e.g., FIFO), transfer request and transfer approval.
Stock Check	Support stock check mgmt.
Organization and Staff Planning	
Org Chart	Allow to define and update multi-level org chart with detailed info for each organization.
	Allow to view the org chart by different reporting lines (e.g., Country, Line of Business, Finance, IT).
	Allow to drill down to department, sub-department and employee info details.
Employment Type, Level and Title	Allow user-defined employment types.
	Allow user-defined corporate levels and titles.
Staff Planning	Allow to view existing head count by group and by title.
	Auto summarize future head count needs based on project plans by group and by title.
	Auto determine additional head count needs by group and by title.
Recruitment Mgmt	
Job Requisition Mgmt	Support single and multiple head count job requisition.
	Support requisition request and approval workflow.
	Full real-time traceability of Needs, Applicants, Interviews, Offers, Acceptance, Rejections and On-boards.
	Auto alert and escalation for not meeting required date.
Web Job Posting& Application	Jobs will be posted on the recruitment website if the posting checkbox is checked in the requisition.
	Allow the candidate to visit the recruitment website to create login, view job posting and create/update CV and apply for position.
CV Master	All candidate CV on the recruitment website will be entered into CV Master in real-time.
	HR staff and hiring managers can screen CV from the CV Master.
	Search criteria are provided to help managers to filter and match CV with the positions.

Interview	Allow to arrange single or multiple rounds of interviews.
	Allow to assign different roles to interviewers for an interview.
	Each interviewer will be able to view the scheduled interviews in her working calendar, proceed to the interview according to the schedule, provide assessment write-up and participate in the interviewer discussions.
	Record all assessment and final decision info.
Background Check	Allow to set-up necessary checks such as education verification, previous employment verification, criminal record, reference check and physical check-up and assign a responsible person for each check.
Making Offer	Allow to set-up compensations and benefits, get approval, send out offer letter and track acceptance/rejection and onboard status on line.
	Allow to set up post for the new employee after the candidate accepts the offer.
	Allow to auto generate the employee record from candidate and offer info.
Recruitment Activity Tracking	Allow to track the progress for each job requisition including the number of openings, the number of applicants, the number of interviews, the number of offers made, the number of offers accepted and the numbers of new employees on-board.
Recruitment Expense Tracking	Allow to specify total recruitment agency fee amount and total interview expense amount each job requisition.
	Allow to record all interview trip request, expense advance and expense reports.
	Allow to track agency fees and expense report amounts against the total amounts allowed in each requisition.
<b>Leave Mgmt</b>	
Leave Type & Rules (Leave Engine)	Allow to define different leave types and the corresponding leave allocation and calculation rules based on job level and/or service seniority.
	Allow to set up different leave advance & carryover rules for different leave types.
	Allow to define different rounding methods.
Leave Version Mgmt	Support version management for each leave type and the user can set or adjust the leave rules in each version.
Leave Requests & Approval	Support online leave requests and approval flow.
Leaves Records	Support managing the leave records and balance info online.
Leave Calendar	Provide the leave calendar for the employees to view their own leave schedule and for the leaders to view the leave schedules of their subordinates.
Leave Report	Provide different leave reports that display the details and summaries of the leave info.
<b>Shift Mgmt</b>	
Shift Scheduling	Support to schedule the roster for month/quarter/year; support max 3 shifts of rotation.
Shift Rules	Support to define the rotation frequency, rotation method and the rotation staffs.
Overtime Rules	Support defining the overtime rules while making the shift scheduling.
Auto-generating of the Rotation Plan	Able to generate the rotation plan according to all the pre-set roster rules.
Shift Attendance Tracking	Provide shift attendance tracking report to analyse the employees' attendance conditions according to the rotation plans and clock-in & clock-out records.
<b>Working Calendar &amp; Attendance Mgmt</b>	
Work Calendar	Allow user-defined work calendars for different types of employees who work in different schedules.
Attendance Info Import	Support to import the attendance info from different clock-in & clock-out machines.
Personal Attendance Info	Allow the employee to view her own attendance records in the system.
Attendance Search & Adjustment	Allow the privileged user to search & view the attendance data of all employees.
	Allow the privileged user to adjust the clock-in & clock-out time for special situations.
Attendance Report	Provide attendance summary report.

Benefits Mgmt	
Benefit Plans Creation	Allow to launch various kinds of benefit plans based on enterprise's internal requirement ranging from the health check-ups to insurances.
Benefit Plan Execution	Support the planning and executing of each benefit plan from defining the benefit type and effective time, estimating cost, enrolling employees, to recording related payment history.
Actual Pay-in& Pay-out Recording	Support to record each employee or each group's actual payment or receiving for a benefit plan.
Training Mgmt	
Skills Recording& Tracking	Allow to define different skill areas and skills in each area.
	Allow to record each employee's skills gained.
	Allow auto increase in experience level for certain skills each year.
	Provide rich search criteria to identify the employee with certain skill levels.
Training Requests	Employee can request for classroom training or self e-learning and submit the request for approval.
Training Arrangements	Support batch arranging the trainings after reviewing all the training requests.
Training Results Tracking	Support recording and tracking different types of training results such as # of credit hours, grade and certification.
Training Expenses	Allow to record the training expenses and linking the expenses with the related group and training activities.
Link Training Results to Performance	Allow to link the training results to performance appraisal as part of the KPI.
Performance Mgmt	
Setting Up Objectives	Support defining KPI goals and evaluation criteria suitable for the position or individual.
Standardized Assessment Templates	Allow to define the standardized appraisal template suitable for the group and/or position.
Top-down or 360° Evaluation	Allow to select top-down evaluation or 360° evaluation.
Real-time Objective Measure	Provide real-time objective measurement info on performance results to aid performance appraisal.
Subjective Measure	Allow the main appraiser to invite clients/partners/suppliers and managers to provide subjective measurement info.
Scoring	Allow user-defined auto scoring methods for combining both objective and subjective measures to assist in decision-making.
Complete Appraisal Flow	The system supports the entire process of the performance appraisal, including: raising the appraisal, setting up the objectives/measurements & appraisal forms, approving the appraisal plans, starting the appraisal, final confirmation of the appraisal results.
Compensation & Payroll Mgmt	
Compensation Mgmt	Allow user-defined compensation types such as wage, bonus, allowance and commission.
	Allow to specify compensation plans for employees.
	Allow to specify different periodical or lump-sum wages, bonuses, allowances and commissions in each compensation plan.
	Allow to specify pay currency and cycle in each compensation plan.
	Allow to specify payment method (e.g., payroll, expense report, check) in each compensation item.
	Auto calculation of cash compensation per annum.
	Auto calculation of percentage of increase per annum.
	Provide auto compensation estimation calculator for HR staff to predict future amount of compensation plan.
Auto calculation of pay-outs in employee's payroll based on the latest compensation plan.	
Compensation Changes Tracking	Allow to record details of the compensation changes in the employee record, including the compensation change reason, effective date etc.

Payroll Calculation Sets for Different Jurisdictions	Support independent payroll calculation sets for each jurisdiction; even within the same jurisdiction, different calculation sets with different payment cycles are supported according to the employment types.
User-defined Payroll Formulas & Computing Rules	Allow the user to design multiple payroll calculation formulas for each payroll calculation sets.
	Auto retrieve the values of calculation formula parameters for calculations.
Automatic Payroll Calculation	Support payroll calculations for all employees according to the user-defined formulas.
	Allow to export the payroll info to Excel.
<b>Business Finance Connectivity &amp; Mgmt</b>	
Campaign Finance Mgmt	Support marketing campaign budget planning and tracking.
	Cost accounting for each marketing campaign (including event marketing).
	Support the campaign investment & return analysis.
Sales Finance Mgmt	Revenue planning and quota management by individual, group and product.
	Quota Mgmt by individual, team, department, division, product, region, line-of-business and enterprise.
	Provide real-time POS interface to capture point-of-sales transactions.
	Provide eOrder to capture online and offline orders.
	Capture new sales and repeated business opportunities for revenue pipeline analysis.
	Provide budget and cost tracking features for strategic sales opportunities.
	Provide contract cost mgmt features.
	Support order or contract based payment terms, invoicing and payment requests & confirmations.
	Support returns, credit/debit notes and refunds.
	Provide revenue, cost and profit analysis by product, product type, client, contract, order, group and region.
Project Finance Mgmt	Project-based sales revenue (quotation, order, contract, invoice, payment) Mgmt.
	Project activity cost budgeting and tracking and multi-level auto aggregation.
	Project-based procurement (requisition, PO, contract, invoice, payment) Mgmt.
	Auto project activity labor cost calculation based on timesheets.
	Expense advance and expense report Mgmt.
	Multi-project and/or multi-center revenue and cost allocation.
	Auto professional service invoice generation based on project resource charge rates and approved expenses.
	Support different methods for project-based revenue recognition.
	Program and portfolio revenue & cost Mgmt.
Procurement Finance Mgmt	Support procurement cost budgeting and tracking.
	Quotation mgmt by individual, team, department, division, product, region, line-of-business and enterprise.
	Support benchmark price mechanism and auto price comparison in PR, PO and tenders.
	Support centralized and distributed purchase acquisition cost Mgmt.
	Support multi-center procurement cost allocations.
	Support PO or contract based payment terms, invoice received, payment received and confirmations.
	Support returns, credit/debit notes and refunds.
	Provide procurement cost analysis by product, product type, supplier, PR, PO, contract, group and region.



Inventory Accounting	Auto forecasting of the stock demanding according to the sales conditions.
	Stock transfer & tracking.
	Logistics cost calculation.
	FIFO & weighted average method for inventory accounting.
	Support stock checking and updating.
Cash Mgmt	Track all cash accounts, investment accounts, sales order/contracts, PO/contracts, project accounts, employee accounts, tax accounts, invoices, expense advances and reports, loans and payments and aggregate information to generate cash flow report.
	Generate and track payment received and payment request records.
	Interface to ePayment systems and track confirmations.
<b>Group Finance Mgmt</b>	
Group Budget Mgmt	Support revenue and cost budgeting and reforecasting by group and by aggregation.
	Support movement of budget within fiscal year.
	Support top-down budget allocation and bottom-up budget request.
	Support different methods of revenue recognition.
	Support unbudgeted expense forecast.
	Support expense accrual.
	Support multiple budget baselines and allow comparison of current budget to any baseline.
	Support tracking budget vs. actual by group and by aggregation.
Group Expense Mgmt	Provide expense request, expense advance, expense report, reimbursement via bursar/payroll Mgmt.
	Support group procurement finance Mgmt.
Fixed Asset Mgmt	Provide unique identification mechanism to record all fixed asset items and the value forecast.
	Provide unique identification mechanism to record all fixed asset items, including name, ID, value, depreciation information etc.
	Support managing the applying and returning process of the fixed assets.
<b>Fixed Asset Mgmt</b>	
Registration	Support to record basic information of fixed assets such as name, type, brand.
	Allow to record asset details including asset number, serial number, tax and original amount.
Conversion	Allow to convert fixed assets that associate with facility & equipment types into facilities and equipment.
Request	Allow to request to use fixed assets that are converted to facility & equipment and submit the request for approval.
Allocation	Allow to allocate available converted fixed assets.
Return	Allow to fill in return sheets and submit them for approval.
Maintenance, Donation & Scrap	Allow to submit and approve maintenance, donation and scrapping sheets.
Check	Allow to submit and approve fixed asset check forms.
<b>Facility &amp; Equipment Mgmt</b>	
Request	Support to apply for available facilities and equipment.
	Allow to submit the facility & equipment request for approval.
Alert	Support the email alert feature to keep track of the application status of facility and equipment.

Kanban Mgmt & Navigation View	
Kanban & Card	Allow self-defined Kanban types, background pictures and grouping, as well as association with groups and business types.
	Allow creation of a new empty kanban board and creation of a kanban board from a template.
	Support creation of cards, card display settings, dragging and dropping of cards.
Navigation View	Support user-defined graphical navigation flows. By clicking the navigation icons, the user can proceed to the specific pages quickly.



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**Wisage Technology Ltd.**

 8Manage.com

 info@wisagetech.com

 +852-6065-1864