

8 Business Process Mgt.

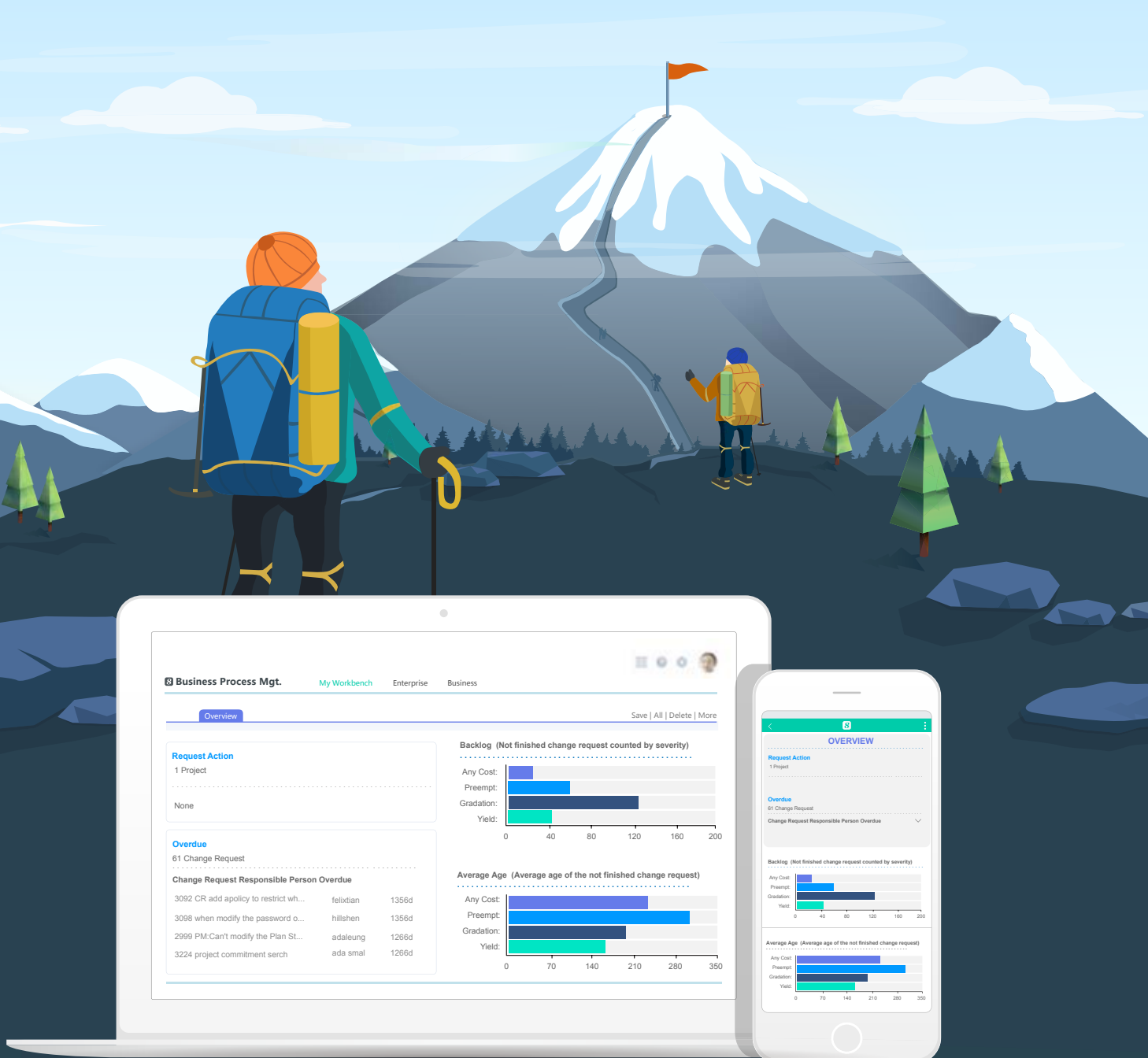
8 Business Process Mgt.

Gets a glimpse of the refined project overall
and improve business and project execution efficiency

8 Business Process Mgt.

8 can help you to manage clients, contracts, projects, resources, activities, procurements, delivery and acceptance, cost and income. With 8, you can maximize efficiency of your normal operations and minimize damages and delays of your abnormal operations by detecting deviations or problems and their root causes at the earliest possible time.

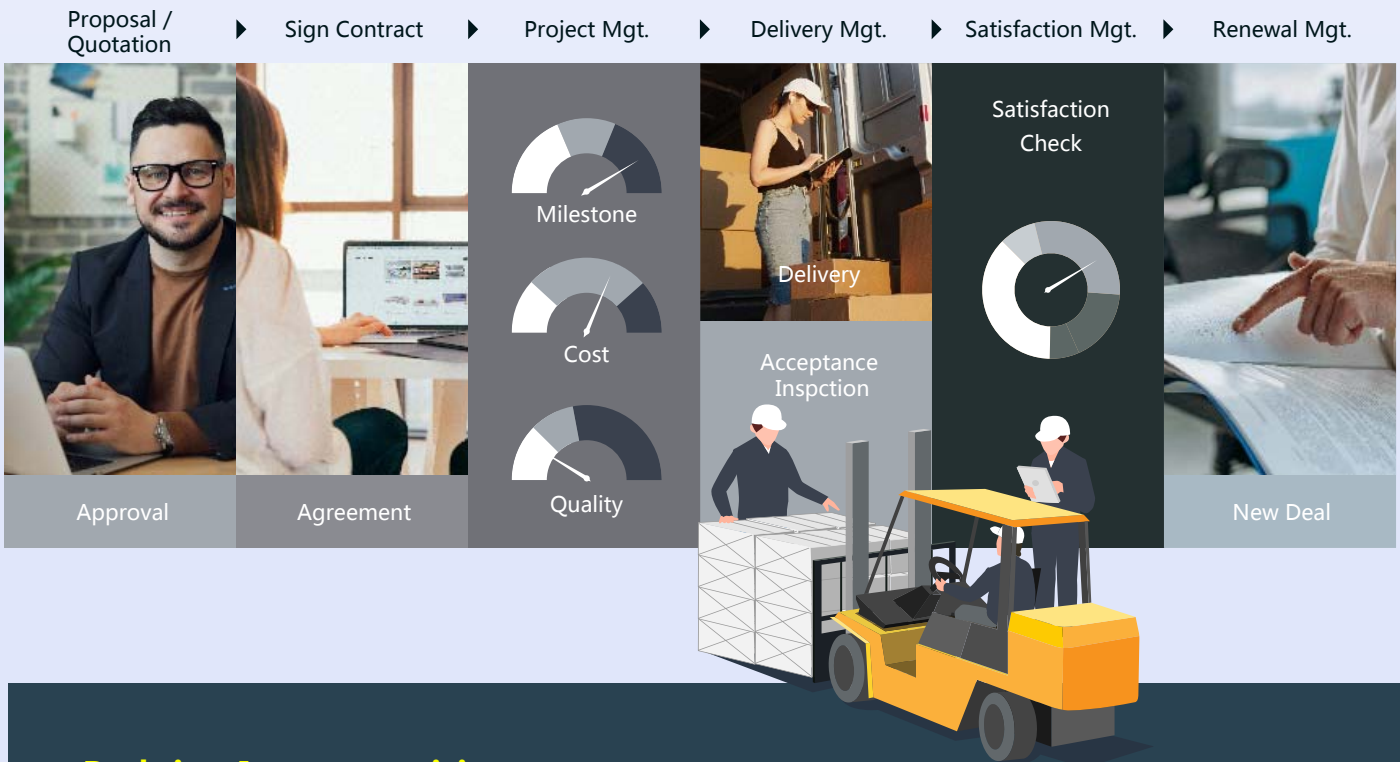
8 can be used to manage different types of business projects such as construction, professional service, OEM, and BPO/ITO projects.



Contract and Project Integrated Mgt.

8 supports the entire contract and project life cycle which includes:

- Proposal and quotation mgt
- Contract and project execution mgt
- Milestone completion and SLA monitoring
- Change, change impact, revenue, cost and profit mgt
- Invoice and payment mgt
- Client satisfaction and contract renewal mgt



Real-time Interconnectivity

8 contract and project are interconnected in real-time, for example:

- Project cost would directly affect contract cost and profit
- The delay in project deliverable would directly affect contract revenue.
- The quality of project deliverable would directly affect contract SLA results.

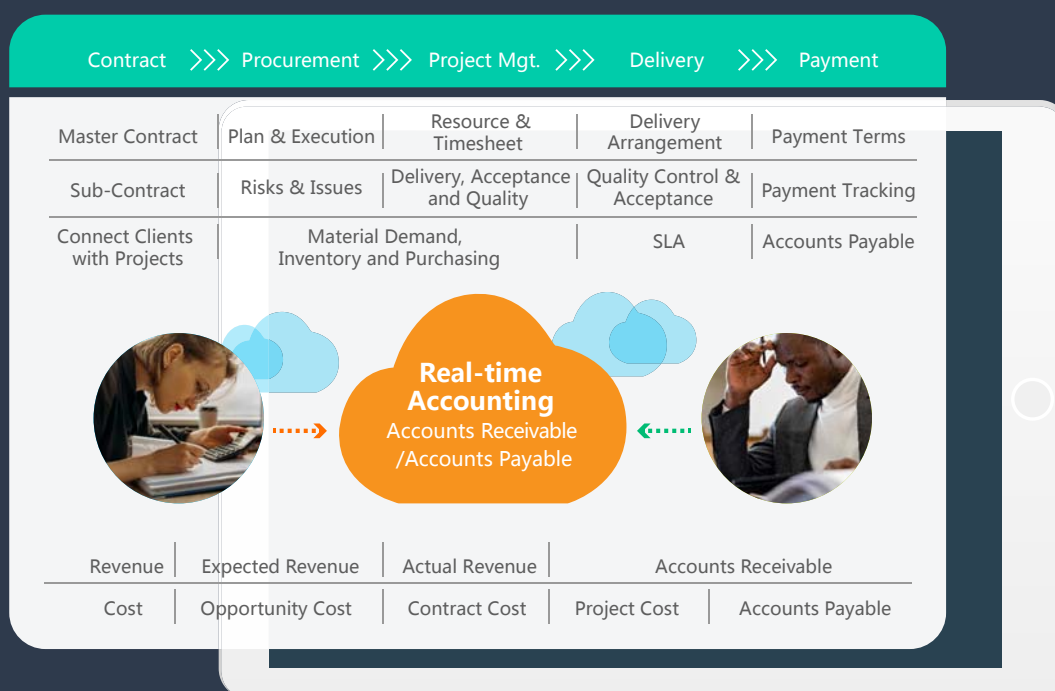
One contract can represent one or more projects

In most cases, a contract represents a single project. But in some areas such as investment and outsourcing, it is possible that a contract can create multiple projects and their results collectively affect the return of investment.

Sales Contract Mgt.

8 supports the following contract mgt features:

- Contract approval
- Transaction contents (products, services and prices)
- Delivery and SLA
- Procurement and payment
- Cost and profit mgt
- Payment terms, invoice and payment mgt
- Revenue recognition and mgt accounting
- Contract renewal mgt



Sales Contract:

8 supports sales contracts for products only, service only and products and services together. It also supports master contracts for specifying terms and conditions and associated sub-contracts or Statements of Work (SOW) to transact incrementally.

8 sales contract can be generated from or linked to a customer opportunity and be used to handle invoicing and payment.

Procurement Contract:

8 supports procurement contracts for buying products only, service only and products and services together. It also supports master contracts for specifying terms and conditions and associated sub-contracts or Statements of Work (SOW) to transact incrementally.

8 procurement contracts can be generated from or linked to a procurement plan and be used to handle invoicing and payment.

Project Mgt.

8 provides features to support the following 10 major areas:



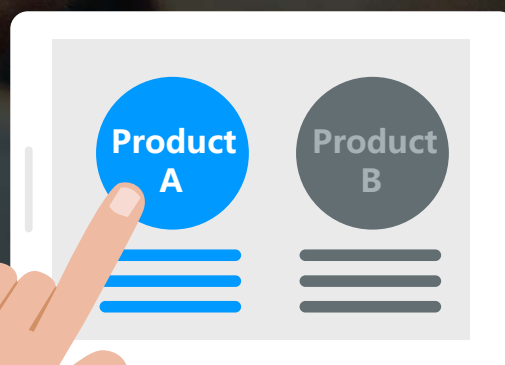
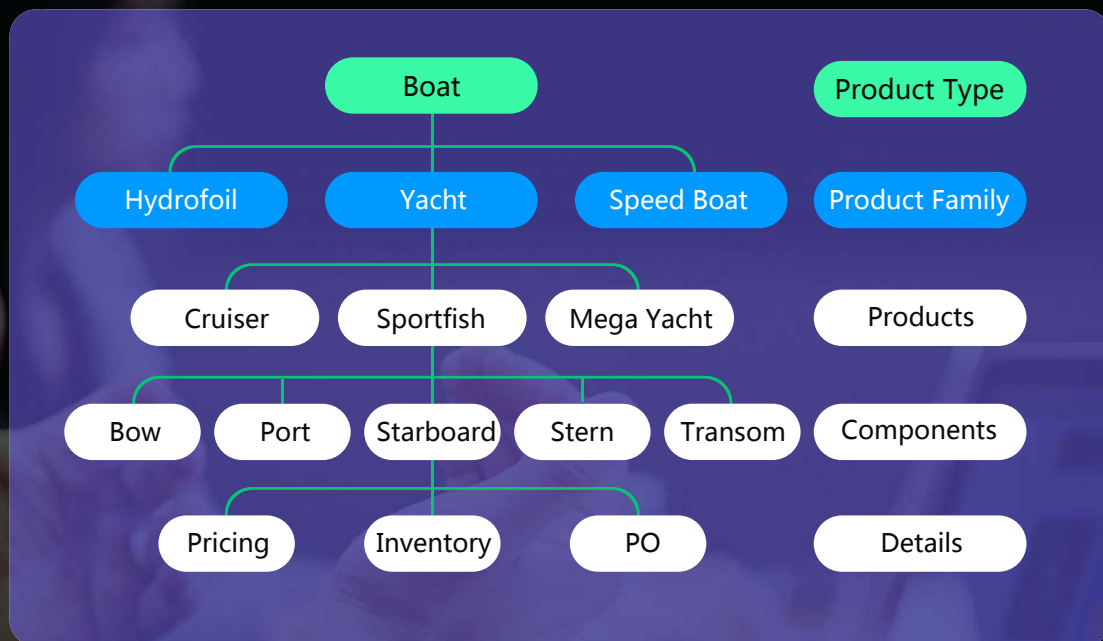
You can select part or all of these features to manage your projects.

- Policy setting
- Project plan and cost approval
- Resource Mgt
- Deliverable planning, quality control and delivery and acceptance
- Schedule, cost, problem and change tracking
- Risk recording and mitigation

Product Mgt.

8 CRM provides the following for you to manage your products:

- Product Master allows you to define product types and subtypes, families, attributes and prices
- Product Component allows you to define product structure, components, bundle and costs
- Cross-sell and Up-sell allows you to define relationships with other products and services
- Pick-Pack-Ship allows you to define the lead time, storage, inventory, packaging and transportation info



The Product module in 8 CRM is the heart of CRM in the sense that it links to all client orders, returns and satisfactions/complaints associated with products. It is also the backbone for client, business and operation big data analysis.

Customer & Opportunity Mgt.

Organization Chart,
Financial Summary, Contact Info

Interactions & Results

Deal/Order/License Info

Topics & Events Interested

Delivery & Customer
Satisfaction Info

Invoice & Payment Info

8 supports recording and maintaining complete customer information, including the following:

- Client organization chart and contact information
- Financial summaries and credit ratings
- Topics/Products of Interest
- Cross-selling and up-selling information
- Opportunities and communication records and results
- Historical quote, transaction and delivery information
- Customer satisfaction information
- Accountable receivable, invoice and payment information

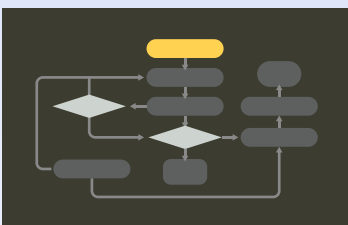
Sales Automation



As sales team members, you can count on **8** to help you look-up client and contact profile and performance information, manage and track sales leads and opportunities, manage client appointments, activities and tasks, prepare quotations as well as prepare 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** provides a holistic view of your business as a whole with links that you can drill down to any level of detail for sales opportunity reports, and Sales performance reports by territory and by sales persons.

Workflow Mgt.



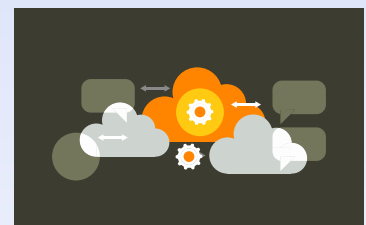
Automate repetitive tasks by allowing your teams to create workflows that trigger actions or send follow-up reminders for the next actions.

Document Mgt.



Collect, upload, store and share documents in a centralized location, making it easier for everyone involved to access information.

Lead Nurturing



Help your teams manage the process of converting leads to customers by developing relationships with prospects and creating targeted contents in each stage of the buyer's journey.

Recurring Revenue Mgt.



8 can help you build up recurring business practices so that you can develop trust and loyalty with your customers. They stick around because your product and service are worth paying for, which reduces customer churn and boosts your profits. You can identify the best areas of growth.

Contract Mgt.



Provide tools with best practices for contract drafting and clause negotiation, performance analysis to maximize operational and financial performance and risk mitigation.

Delivery & Support



Provide tools with best practices to manage and measure the swiftness of deliveries and conditions of delivered goods and services and the customer satisfaction level.

Client Mgt.



Provide tools with best practices to manage and measure communication progress of each client and detect any changes that may impact the client.

Recurring Profit Mgt.

8 helps an organization to establish revenue targets and track results.

- Revenue target
- Real-time revenue recognition
- Detect deviation from target at the earliest possible time
- Display revenue according to region, organization, line of business and currency
- Sales funnel analysis

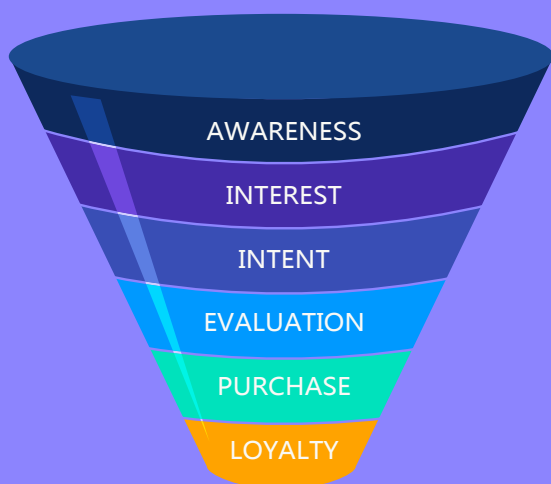
8 provides profitability mgt from the lowest level of projects and contracts where revenue and cost occur to the highest level of the enterprise.



Revenue Target



Sales & Budget Analysis



Sales Funnel Analysis



Real-time Revenue Analytics

Customer Support Mgt.

8 helps transform your customer service to great.



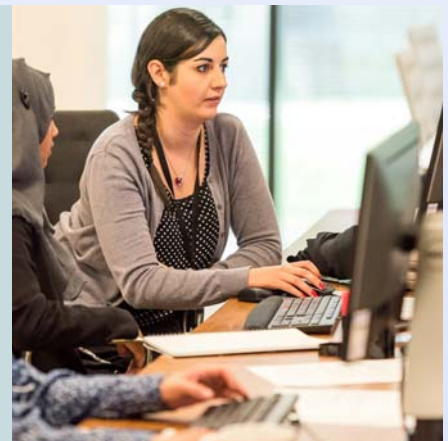
Personalized

Good customer service always starts with a human touch.

8 allows your teams to personalize interactions to greatly improve customer service and let customers know that your company cares about them and their problems. Instead of thinking of service as a cost, consider it an opportunity to earn your customer' s business all over again.

Competent

Customers have identified competency as the element that plays the biggest role in a good customer experience. 8 provides you the knowledge management facility to allow your teams to maintain a strong knowledge of the company and its products, as well as the power to fix the customer' s problems. The more knowledge they have, the more competent they become.



Convenient

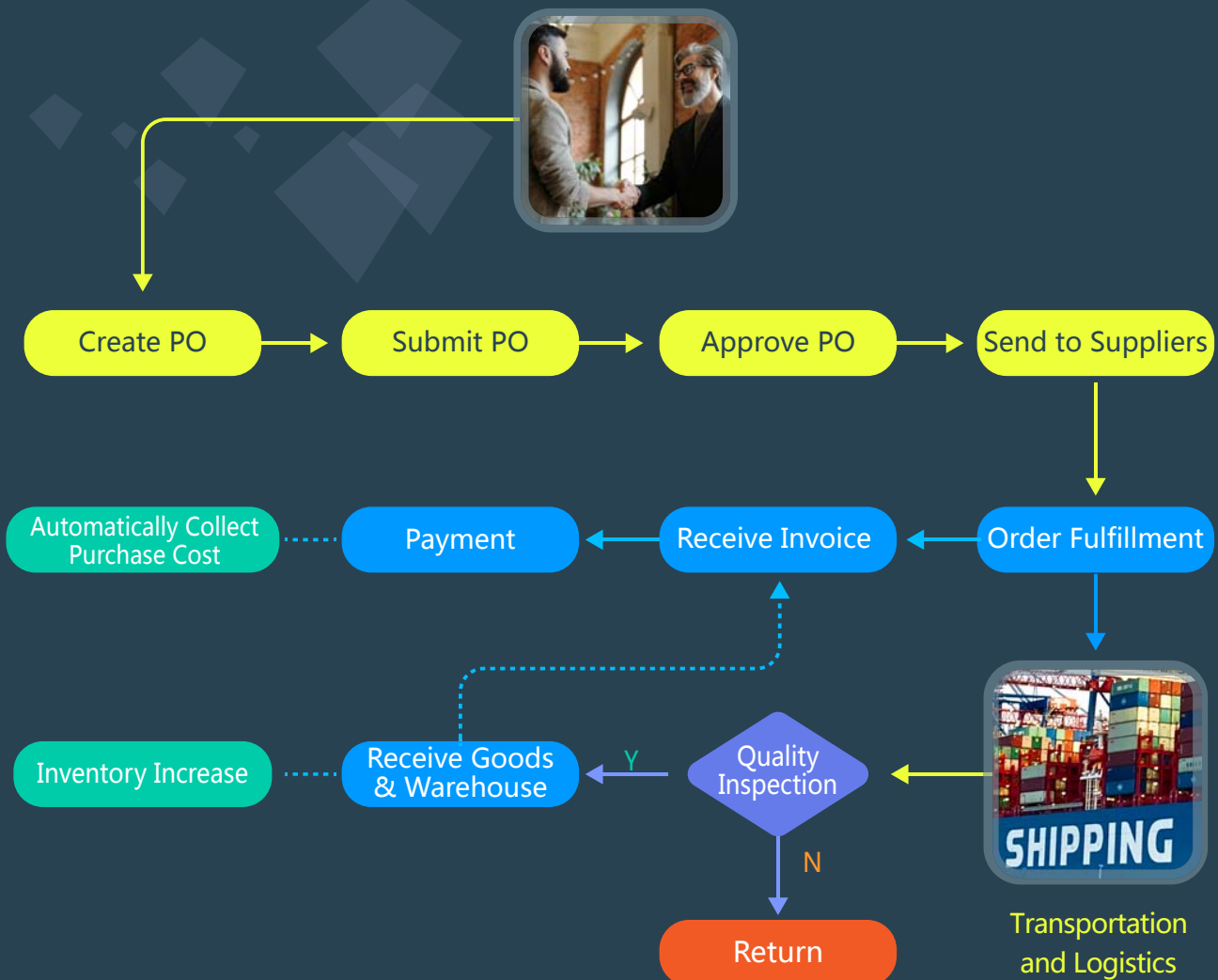
Customers want to be able to get in touch with a customer service representative through whichever channel is the most convenient for them. 8 allows your customers to get in touch with your service teams via multiple channels and also provides them tools to make it easy for them to figure out how to contact you.

Proactive

Proactive customer service is about anticipating customers needs (or problems) before they are aware of them or need to contact you for assistance team to communicate and alert customers of issues, like service delays or interruptions.



Supplier & Procurement Mgt.



8 provides the following features to help the user manage contract-based procurement projects in a more systematic manner.

- Supplier recruitment and pre-qualification
- Supplier basic, product, service and rating information
- Supplier qualification and approval
- Purchase plan and requisition
- Quotation and price comparison
- Purchase order mgt
- Delivery, quality and acceptance mgt
- Invoicing and payment mgt
- Supplier KPI and performance mgt

Supplier (Outsourcer) Mgt.

Manage many suppliers in their each step

Supplier Segmentation



8 allows you to segment your suppliers into groups based on certain criteria, you can decide on the type and level of attention needed. By doing so, you will achieve the following benefits:

- Procurement teams can focus on specific suppliers and categories, improving efficiency.
- Buyers can have access to data for better price negotiation and risk management.
- Finance teams can track spending by supplier type, making it easier to identify cost drivers.

Evaluation & Selection



8 provides you the workflow to identify, evaluate, and select suppliers that meet your specific requirements. You can have many criteria to consider when selecting your suppliers, such as quality, price, delivery time, track record and potential conflicts of interest.

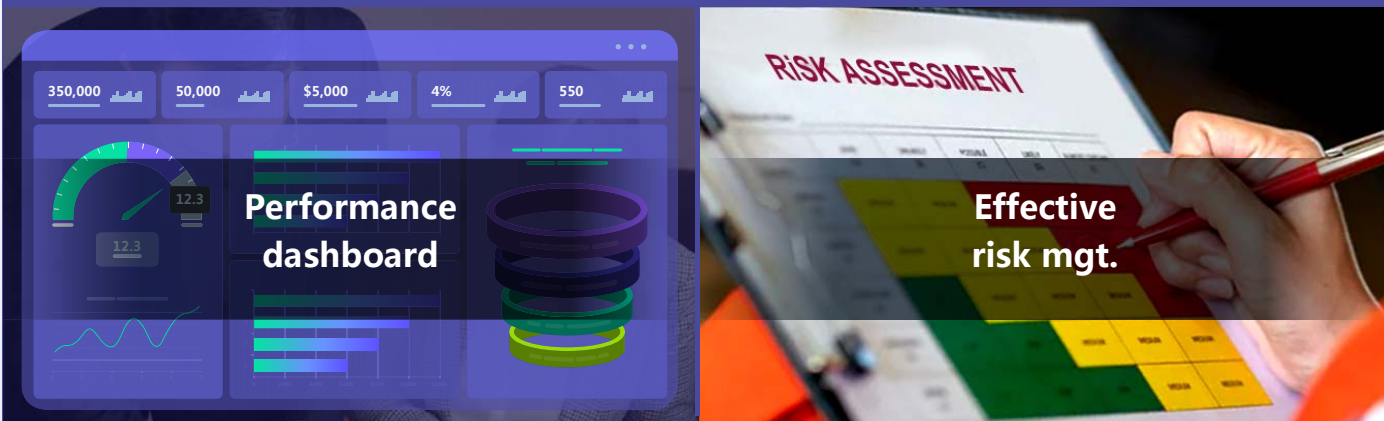
Onboarding and Implementation



8 supplier portal provides the automated workflows for collecting and analyzing supplier information in order to register and approve suppliers for the purpose of procurement of goods and service in a secure and compliant manner.

8 provides the workflows for putting a contract into action. Since contract implementation can be complex and time-consuming, it is very important to get it right so that both parties receive the benefits they expect from the agreement. **8** tracks contractual terms to ensure both parties meet the contractual obligations. It also provides visibility to the large business.

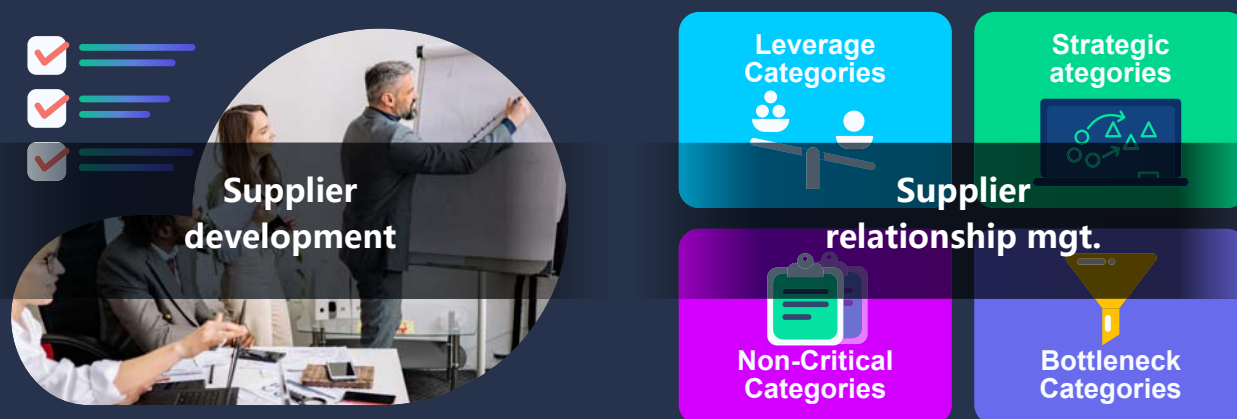
Supplier Performance Mgt.



8 provides the workflows to measure, analyze, and manage the supplier's performance in an effort to cut costs, alleviate risks, and drive continuous improvement. Supplier performance can be assessed by evaluating a few characteristics which can include:

- Product or service quality
- Percentages of incoming rejects
- Delivery accuracy
- Warranty claims
- Customer service
- Delivery lead times
- Account management
- Commercial costs

Supplier Relationship Mgt.

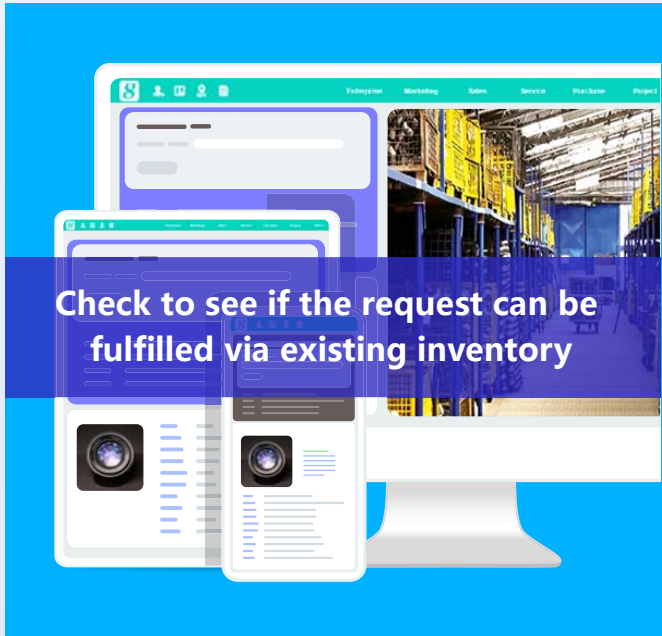


Replacing a supplier can be costly and time-consuming and may slow your business down.

8 keeps accurate records and provides you better data and enhanced collaboration to ensure your relationships with your suppliers remain profitable. It's a win-win for all parties. Over time you'll notice that communications improve and mutual goals will align more closely.

Purchase Requisition (PR)

Formalize request from a user or group, act as a control and track results



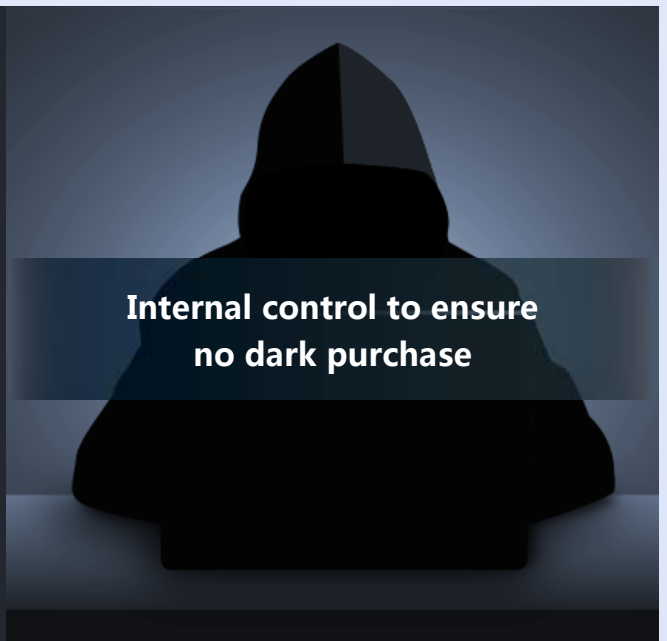
Check to see if the request can be fulfilled via existing inventory

Demand Mgt.

8 provides tools to forecast, plan for and manage the demand for products and services so that they are available when the business needs them. The tools allow you to carefully manage resources, budget and forecast to ensure that the right amount of goods and services are available at the right time.

Approval Mgt.

8 provide the purchase requisition approval flows to set clear checks and balances for spend requests related to new material, new equipment, new labors, new budgets and every other type of expense. The well-designed approval workflows protect your organization from spending over budget and running out of cash.



Internal control to ensure no dark purchase



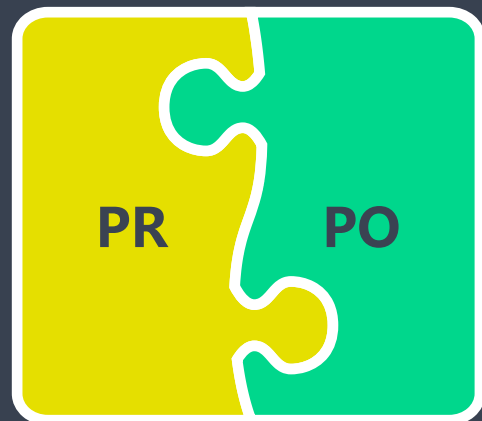


RFQ & Quotation

8 PR can be converted to 8 RFQ to solicit goods or services in which a business can invite suppliers to submit price quotes and bid on the job.

Purchase Order

8 PR can also directly converted to 8 PO. It then becomes a legally binding agreement between the buyer and the supplier.



Delivery Performance

8 provides delivery metrics such as below to allow you to manage performance:

- Number of complete deliveries
- Order accuracy rate
- On-time delivery rate
- Late frequency
- Complain rate
- Return rate

Supplier (Outsourcer) Quotation

8 provides an efficient way for inviting sealed quotations.

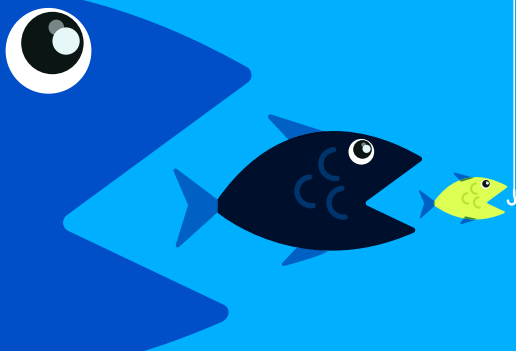


Open & fair process

8 e-Quote offers an open and fair process to reduce the chance for corruption.

Confidential bids

8 e-Quote's confidential bids encourage contractors to drive down prices



Incentive best offer


8 e-Quote maximizes the competitive incentive to offer the best price initially.

Accurate comparison

8 e-Quote allows your teams to compare bids accurately.



Purchase Order (PO)



Compliance mgt.

8 enforces the specification of the following during PO creation and detects their deviations during PO execution:

- Terms and conditions of the order
- The list of which items will be purchased
- The quantity of each item
- The price of each item
- The delivery date for each item (or for the entire PO)
- The delivery location for each item (or for the entire PO)

Approval mgt.

8 PO approval is the flow of actions required from different stakeholders to validate a PO and bring it into effect. The process checks and balances to ensure the organizations:

- Spends within a budget limitation
- Complies with company spending policies

For any purchase order to be a legally binding contract, it must pass the approval process.





Communication mgt.

8 PO helps manage the orders and expectations surrounding a transaction. When a clear workflow is established, all parties will understand what happens at each step. This helps teams better communicate and clear up any misunderstandings along the way.

Acceptance

8 PO supports planning, organizing and managing the delivery and acceptance of goods and services. It also supports the inspection, storage, return and any movement of goods. This is a crucial aspect of any goods and services acquisition, as it affects the cost, quality and safety of the production or work.



Warehousing & inventory

8 PO allows you to take control of your inventory levels, minimize out-of-stocks, and sync warehouse stock levels with purchasing tasks. Whether you're a small business or an enterprise-level corporation, ensure efficient inventory control and smooth procurement processes.

Procurement (Outsourcing) Contract

8 Procurement Contract is for long-term arrangements between your organization and suppliers.

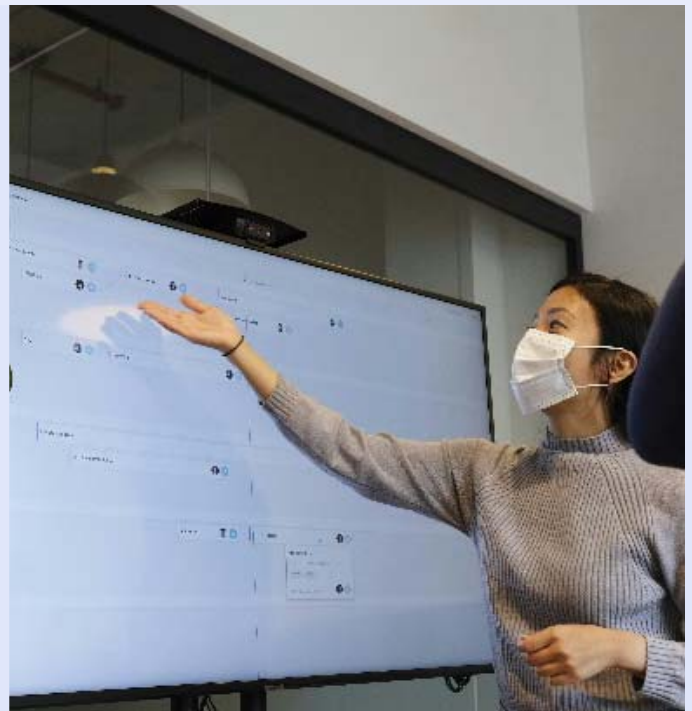


Cost Budgeting

8 Procurement Contract provides you tools to estimate contractual costs, set an agreed budget and manage the actual and forecast costs against that budget.

Selection

8 Procurement Contract provides you the workflows for identifying, evaluating, and choosing third-party product suppliers or service providers. It involves seven main stages, starting from determining the needs of your organization and ending with managing the relationship with the supplier. The entire process ensures that suppliers meet the organization's specific needs and requirements for their operations.



Requirements Specification

8 Procurement Contract provides you tools to collect and specify requirements that are to be imposed on the design and verification of the product. The specification also contains other related information necessary for the design, verification, and maintenance of the product.

Due Diligence

8 Procurement Contract allows you to gather information to understand the credibility and suitability of the prospective supplier that you intend to have a business relationship with.



Service Level Agreement

8 Procurement Contract provides you tools to specify and track the commitment to the standards the provider must adhere to, and the metrics to measure the performance.

Terms & Conditions

8 Procurement Contract allows you to set the rules of how the product or service may be used including, but not limited to, things like copyright conditions, age limits, and the governing law of the contract.



Negotiation

When two companies negotiate, both parties seek to obtain favorable terms and minimize financial, legal and operational risk.

8 Procurement Contract provides you the communication tools to work with your suppliers to come to an agreement on a set of legally binding terms.



Legally Binding

8 Procurement Contract provides you the electronic signing tool to allow you and your supplier to append signatures to your contract, symbolizing agreement and understanding between the parties involved. This process is fundamental to business transactions, serving as the final step in formalizing agreements. The act of signing a contract holds significant legal weight.

Project Initialization

8 provides you tools for project initiation. Project initiation is the first step in starting a new project. During the project initiation phase, you establish why you're doing the project and what business value it will deliver—then use that information to secure buy-in from key stakeholders.

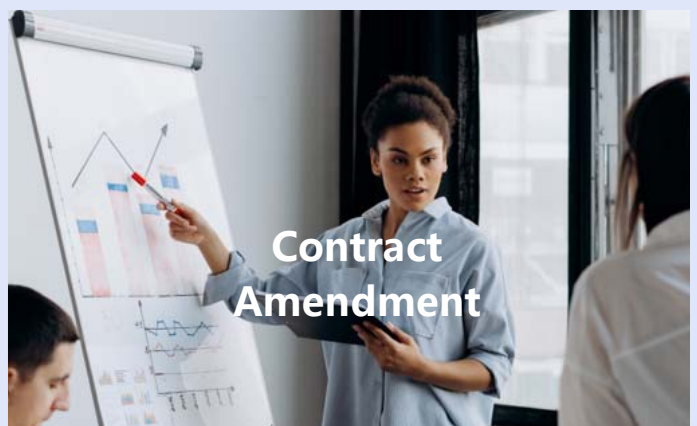


Project Delivery

8 Procurement Contract provides you and your supplier tools to manage each activity and deliverable in your procurement project to meet the delivery requirements.

Change Management

8 Procurement Contract provides you tools to manage unexpected changes to ensure that impacts are minimized, changes are made smoothly and without disrupting the other tasks.



**Contract
Amendment**

Final Acceptance

Under the common law of contracts, upon final acceptance, the owner takes control and ownership of the project and the risk of loss passes from the contractor to the owner.

8 Procurement Contract provides you tools to record the final acceptance of the work as completed, including any deficiencies known to exist.



Invoicing & Payment

8 Procurement Contract provides you tools for your supplier to submit invoices to you and you to request payments to pay the invoices according to the contractual payment terms.

Maintenance

8 Procurement Contract provides you tools to manage support service levels to ensure nursing activities and defect repairs are done according to the contractual terms.



Renewal

8 Procurement Contract provides you tools to track contractual renewal periods and pre-agreed upon prices and automatically generate reminders and renewal contract drafts for you.

Settlement

Settlement is a crucial step in the procurement process. 8 provides a secure cloud environment with the highest transparency and visibility into the settlement workflow. Immediate access to procurement budget information helps you detect inconsistencies and potential fraud before they become significant problems.



Supplier Invoice & AP

8 automates your supplier invoice and AP workflow seamless and simple. Say goodbye to wasted time managing invoices and payments.

3-way Matching

With 8 you can perform three-way matching between the delivery-and-acceptance document, supplier Invoice, and PO/Contract to check if you have received the order correctly and if there aren't any discrepancies. Once three-way matching is complete, the invoice is approved and forwarded to payment processing.



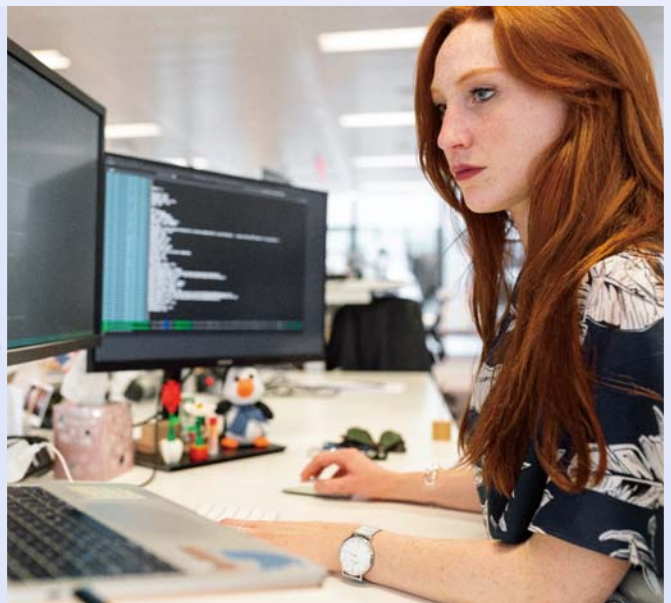


Payment

8 allows you to pay one or multiple approved invoices to the supplier. After your payment request is approved, your finance department will be notified to issue the payment.

Bookkeeping

After the payment process, you make a record of it for bookkeeping and auditing. All appropriate documents right from purchase requests to payment are stored in the 8 system.



Traceability and Auditability

8 allows a simple and cost-effective way for a business to investigate its transactions and invoices presented by its suppliers. You can use 8 to examine invoice integrity prior to paying a supplier. 8 provides valuable information on the status of an invoice and signals a warning when receivables are disputed or goods are undelivered.

Business Process Mgt. Feature list

Feature	Description
Project Mgt.	
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 Mgt.	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 automatically 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 independently from project library.
	Support knowledge Mgt. in project library.
Project Activity Planning	
WBS	The form of 8Manage 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 Owners	Able to assign the responsible person of the activities individually 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, it can better ensure the time restriction as well as the flexibility.
Sub-projects	A project can be inserted as an activity to another project's WBS.
Critical Path	Critical path activities are visually 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.
Project Resource Planning	
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 automatically.
Resource Allocation	Support resource tracking and adjustment request on resource allocation according to the resource's usage.
Project Deliverable Planning	
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/Project level.
Minimum Quality Requirement of Milestones	Support setting the minimum level of quality control for milestones on Enterprise/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.
Budget Planning	
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 or by each project.
Reserve Fund	Support managing the reserve fund of the project.
Asset Depreciation	Support managing the asset depreciation of the project.
Project Approval	
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 automatically.
Project Activity Execution	
Deliverable Mgt.	
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 Mgt.	Allow the commitment management of the deliverables; the commitment process includes commitment-implementation/re-negotiation/commitment breaking.

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.
Project Resource Utilization	
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 records automatically according to the actual timesheet records, able to calculate the project resource costs automatically.
Resource Tracking	Resource tacking feature supports dynamically tracing the resource usage in a project and detecting any overload and resource conflict.
Commitment Mgt.	Allow the commitment management of the resource allocations; the commitment process includes commitment-implementation/re-negotiation/commitment breaking.
Cost Mgt.	
Expense	The system supports the expense flow management from request to payment delivery.
Cost Classifications	The project can inherit the cost classifications of 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.
Project Communication Mgt.	
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 automatically (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 automatically 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.
Project Change Mgt.	
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.
Requirements Mgt.	
Requirements Capture	Allow users to record and handle project and product requirements in the system.

Priority & Settings	Allow to define the priority 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.
Test Mgt.	
Test Case	Allow users to create test cases and associate them with requirements
Test Coverage	Allow users to measure the test coverage of requirements.
People Mgt.	
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.
Project Monitoring	
Cost Monitoring	
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 and by real-time.
Cost Overrun	The system will monitor the cost overrunning the approved budget in real-time automatically.
Budget Re-approval	With pre-set rules, when budget being modified, it will trigger the restriction to re-approve the project.
Progress Monitoring	
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.
Quality Monitoring	
Quality Monitoring	The system will keep track of the project quality dynamically 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.
Resource Monitoring	
Resource Overall Monitoring	The system will automatically monitor the overall resource conditions, including overdue resources, unreasonable allocations, 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.
Risks & Issue Monitoring	
Risk Detection	Auto detection of the resource risk, schedule risk, cost risk, management risk etc. and demonstrates the risks in the project dashboard.
Risk Mgt.	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 Resolution	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.

Re-forecast Mgt.	
Schedule Re-forecasting	8Manage 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-forecast 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.
Project Closing Mgt.	
Outstanding Item List	List all outstanding items (e.g., outstanding invoices) that must be handled before project closure.
Deliverable Archiving	Allow to move all the attachments of the deliverables into specific project folders in the project library.
Releasing Resources	Allow to release all the requested resources after closing the project.
Project Documents Mgt.	Allow to move all the remaining project documents into the project library.
Project Closure	Support to complete and close the project in the system.
Product Mgt.	
Product Master	Allow user-defined product types, families, sub-families and brands.
	Support auto generation of product ID based on user-defined rules.
	Support both global product view and group-oriented product view and access control.
	Able to store and maintain product info such as product type, product family, product name, product ID, product supplier, product price info in Product Master.
	Support to add user-defined fields in the product basic info page.
	Support packaging specification and quantity control.
	Support product costing based on purchase price or manufacturing cost.
	Support product pricing based on cost plus margin or list price minor discount.
	Support multiple price and discount rules based on client type and volume.
	Able to record up & cross sell product info.
	Provide inventory Mgt.: a) Track demand from sales orders b) Track supply from shipment info c) Track inventory movement and current quantity d) Support periodical stock check
Support serial number or other identification Mgt.	
Allow user-defined product approval flow.	
Product Analysis & Evaluations	Allow to analysis and evaluations of # of Clients, Total # of Campaigns, Presale ROI, Total Product Cost, Gross Profit, etc.

Service Mgt.	
Incident Mgt.	
Service Ticket (Incident) Mgt.	Support to record basic info such as subject, ID, requestor, urgency, impact and priority.
	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 to record service levels, action and acceptance.
	Allow the service desk to communicate to the client in real-time.
	Allow clients to escalate calls to the service manager.
	Allow to check the service ticket related report, such as Service Ticket Count Summary.
Service Catalog Mgt.	Allow to record service catalogs that include service name, description, service category, service level and so on.
	Support to check service catalogs through the table view or the kanban view.
Configuration Item Mgt.	Allow to add configuration items for products/services, and record service provider, service termination date and other information.
	Support adding sub-configuration items to a configuration item.
Configuration Mgt. (SVN/CVS)	
Configurations and Integration Mgt.	Built-in function to integrate with SVN/CVS for instant usage.
Change Mgt.	
Change Request	Support registration and processing of change requests for product defects and enhancements.
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.
Approval	Allow to customize the change request approval flow of the group.
Audit Trail	Provide audit trail to record all the changes of the change requests.
IT Asset Mgt.	
Registration	Support to record IT asset info including name and usage status.
Maintenance, Donation & Scrap	Allow to submit and approve maintenance, donation and scrapping sheets.
Check	Allow to add fixed asset check forms based on internal groups and record checking person, checking date, results, etc.
	Allow to submit the fixed asset check forms for approval.
Knowledge Mgt.	
Service Knowledge Base	Provide framework for building up knowledge base.
	Allow easy access of knowledge from the knowledge base.
Client Service Satisfaction	
eSurvey for Client Satisfaction	Support user-defined questions and scoring methods in eSurvey.
	Allow clients to participate eSurvey online and auto calculate the scores.

Procurement Mgt.	
Supplier (Outsourcer) Mgt.	
Info Mgt.	Support to record basic info of suppliers, such as region, industry, type, grade, product, status, etc.
	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 suppliers.
	Allow to score supplier performance and submit for approval.
	Support supplier classification by grade.
	Support to check the supplier blacklist.
	Support flexible definition of questionnaire content.
Risk identification	Support to connect TianYanCha business search platform to access suppliers' credit information.
Procurement Demand Mgt.	
Procurement Demand Basics	Support online filling and approval of procurement demands.
	Support setting purchasers by product type, who can generate purchase requests based on the approved procurement demand's products.
	Supports associating products of approved procurement demands with purchase requests.
Purchase Request Mgt.	
Purchase Request Basics	Support online submission and approval of the purchase requests.
	Allow to define different approval flows according to groups, cost levels etc.
	Auto check of procurement budget when submitting a purchase request.
	Able to assign a responsible person to follow-up the purchase request.
	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 Request.

Purchase Order Mgt.	
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 (Outsourcing) Contract Mgt.	
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 Mgt.
	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 per-defined SLA types.
	Auto real-time tracking of each SLA actual against target.
Procurement Financial Mgt.	
Invoice	Support to generate invoices based on a single receipt or payment terms.
Statement of Account	Support to gather goods receipt notices and returns based on the periods to generate statements of account.
	Support sending statements of account to the supplier contact for confirmation.
	Support to deduct the supplier advance payment from the bill amount to calculate the actual account payable.
Payment	Support payment based on confirmed statement or invoice amount.
	Support correlation between payment amount and invoice amount, and to filter payment records with difference between payment amount and invoice amount.
Sales Mgt.	
Client Mgt.	
Client Info	Allow to record contact info of different contact types, different contact methods and different contact addresses for different purposes (e.g., invoice, shipment, service and payment).
	Allow user-defined client qualification criteria and methods.
	Allow to assign people to different service roles relationship manager, sales rep, account manager, delivery manager and service rep to service the client.
	Allow to log all product-based or requirement-based interest and marketing info of the client.
	Allow to log all opportunities and progresses of the client.
	Allow to log all interaction and transaction info of the client.
	Allow to log all service info of the client.
	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 automatically calculated.
Lead Mgt.	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 Mgt.	Allow to track conversions such as lead to first-time-client, first-time-client to repeated-client, repeated-client to reference-able client and active-client to inactive-client.
Search & Data Mining	Provide basic search based on fields such as size, region and industry defined in the general info page.
	Provide advanced search based on fields defined in the following categories: a) General b) Responsible Parties c) Interest d) Value e) Interaction f) Behavioral g) Special info
Abandon & Blacklist Mgt.	Manage the abandoned and blacklist clients.
Audit Trail	Provide audit trail on client info changes.

Sales Automation	
Marketing & Sales Planning	Marketing campaign planning and automation
	Allow user-defined sales stages and funnel measures.
	Support automatically allocation of sales reps to new clients based on industry and region.
	Allow to create sales assignment in sales calendar.
	Provide automatic alert to remind scheduled activities.
	Supports automatically tracking activity result.
	Provide client interaction Mgt. on the followings: a) Interaction purpose b) Schedule c) Sales stage d) Interaction type e) Key decision makers f) Result g) Follow-up actions
Opportunity Mgt.	Support opportunity cost budgeting and tracking.
	Support ROI analysis, competition analysis, automatic GP and GP rate calculation.
	Support management review for prioritization and approval
	Allow to establish project for POC in pre-sales
	Support generation of sales order or contract from a successful opportunity.
Quotation Mgt.	Support quotation management: a) Easy of 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.
Contract Mgt. for Sophisticated Products	Provide contract management for consumer products: a) Creation of contracts based on fixed price or time & materials b) Metrics-based authorization and allow user-defined quotation approval flow based on department/team c) Provide sophisticated Bill of Material function in contract, such as version definition and comparison, approval flow/stages settings and link with inventory, etc. d) Allow contract payment to be triggered by time or completion of project milestones e) Support contract renewal or provide contract renewal reminder for manual renewal
	Support Service Level Agreement management in contract: a) User-defined measurement types b) Definition of target type, reward type and buffer type and penalty type c) Link with project milestones/user-defined milestones for SLA measures d) Calculation and monitoring of actual result and gap between target and result e) Track SLA target & result on one screen
	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.

Revenue Budgeting, Sales Quota & Commission Mgt.	Allocation of sales quota to different salesmen/sales teams/departments by batch input for each revenue item.
	Monitoring of sales quota achievement of each salesmen/team as well as achievement percentage based on quota.
	Support drill-down of figure to view details of sales orders/contracts.
	Support setting annual, quarterly and monthly sales targets and quota for specific sales representatives in specific groups.
	The achieved quota of each sales representative or group can be tracked in real-time.
	Support KPI Mgt. and real-time variance tracking of quota and achieved quota.
	Provide commission calculation based on either a user-defined commission program or commission input in each order/contract.
	Support tracking of sales commission achievement based on month/quarter/year.
Revenue Pipeline Mgt.	<p>Provide pipeline management to count % of confidence level from sales opportunities:</p> <ul style="list-style-type: none"> a) Tracking of payment received and outstanding invoice based on quarters on one screen b) Provide drill-down of figures to show details of payment received/outstanding invoices c) Aggregation of revenue pipeline information to from subgroups to headquarters d) Out-of-box pipeline display components, including pipeline bar chart and pipeline trend graph
Invoicing and Payment	<p>Provide convenient invoicing and payment functions:</p> <ul style="list-style-type: none"> a) Generation of invoice based on payment terms b) Batch handling of invoices to a client/contract c) Batching handling of payment received from client to settle multiple invoices of a client for different orders/contracts d) Linkage between invoice and payment e) Provide invoicing alert based on payment terms f) Provide detailed tracking report for invoice and payment
Human Resource Mgt.	
Organization 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.
Training Mgt.	
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 training 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 Mgt.	
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.

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Wisage Technology Ltd.

 8Manage.com

 info@wisagetech.com

 +852-6065-1864