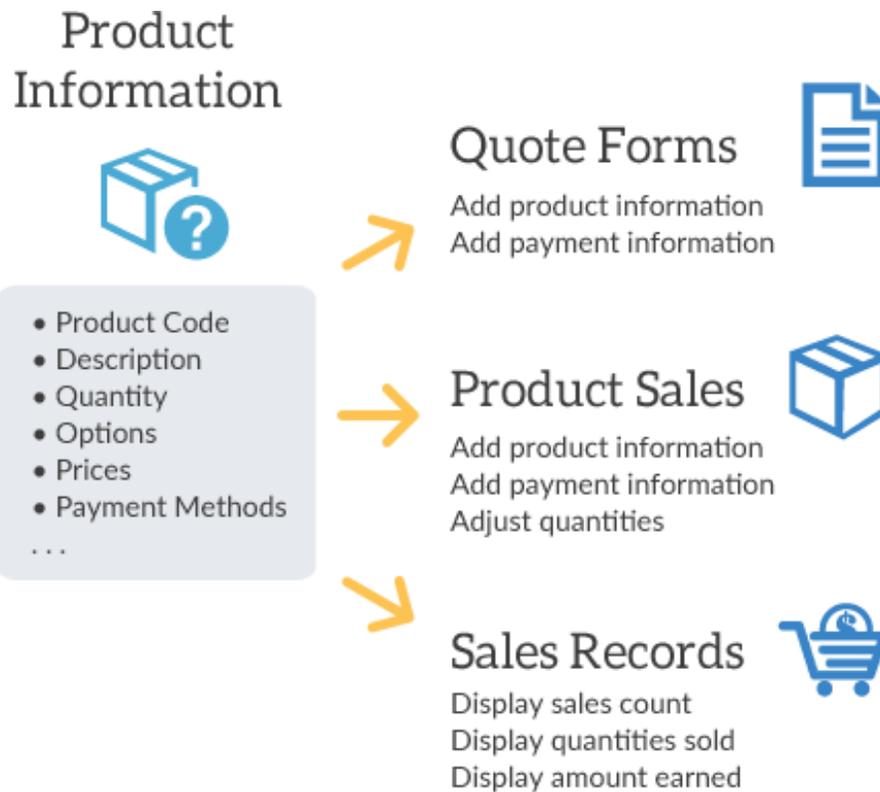


Moffice CRM Products & Payments

Introduction

To start utilizing Moffice CRM for sales, you will need to input information about your products and services and accompanying payment methods. Adding this data will help track sales and profits from purchases. The product information will also be pulled when using product-related data such as when creating a product quote or product sale. Likewise, after inputting product and payment information, users can track comprehensive sales and payment records through the Sales menu. Helpful for international sales as well, Moffice CRM allows users to see the number of sales and the total amount earned per currency. Thus, through adding product and payment information, users can enjoy easier data entry, more accurate analysis, and more precise record-keeping for their business.



Adding a Product Group

Just like setting up an organization chart for people, utilizing products requires an organization chart for items before completion. To start setting up, head to Products > Products > Product Groups. You'll create folders for each relevant product group and add products inside those folders.

After adding products to the groups, you can check the complete product count and sales statuses per group through this menu as well.

The screenshot shows the 'Add Product Group' form. On the left is a sidebar with navigation options: Dashboard, Products (selected), and Competitors. The main area is titled 'Product Groups' and shows a tree view with 'Skincare' and 'Makeup' folders. The 'Add' form on the right includes the following fields:

- Parent Group:** A dropdown menu with 'Main Group' selected.
- Group Code:** An empty text input field.
- Product Group:** An empty text input field with a red border and a red error message below it: "Please enter a Product Group name."
- Group Description:** A large empty text area.
- Product List:** An empty list area.

At the bottom of the form are 'Save' and 'Reset' buttons.

Product Groups

The screenshot shows the 'Edit Product Group' form. On the left is a sidebar with navigation options: Dashboard, Products (selected), and Competitors. The main area is titled 'Product Groups' and shows a tree view with 'Skincare' and 'Makeup' folders. The 'Edit' form on the right includes the following fields:

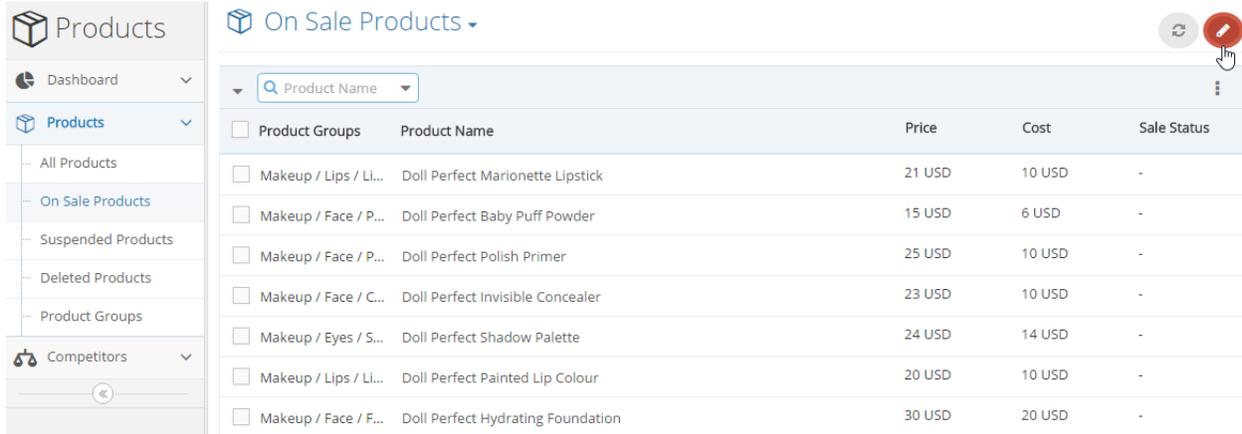
- Parent Group:** A dropdown menu with 'Face' selected.
- Group Code:** An empty text input field.
- Product Group:** A text input field containing 'Foundation'.
- Group Description:** A large empty text area.
- Product List:** A list area containing one item: "[On Sale]Doll Perfect Hydrating Foundation".

At the bottom of the form are 'Save' and 'Delete' buttons.

Adding a Product

Now, to utilize product data, you must naturally add a product and its information. To do so, head over to the Products menu. Products must be added one-at-a-time because Moffice CRM must individually generate specific Product Keys.

To add a new Product, click the pencil icon to open the creation page.

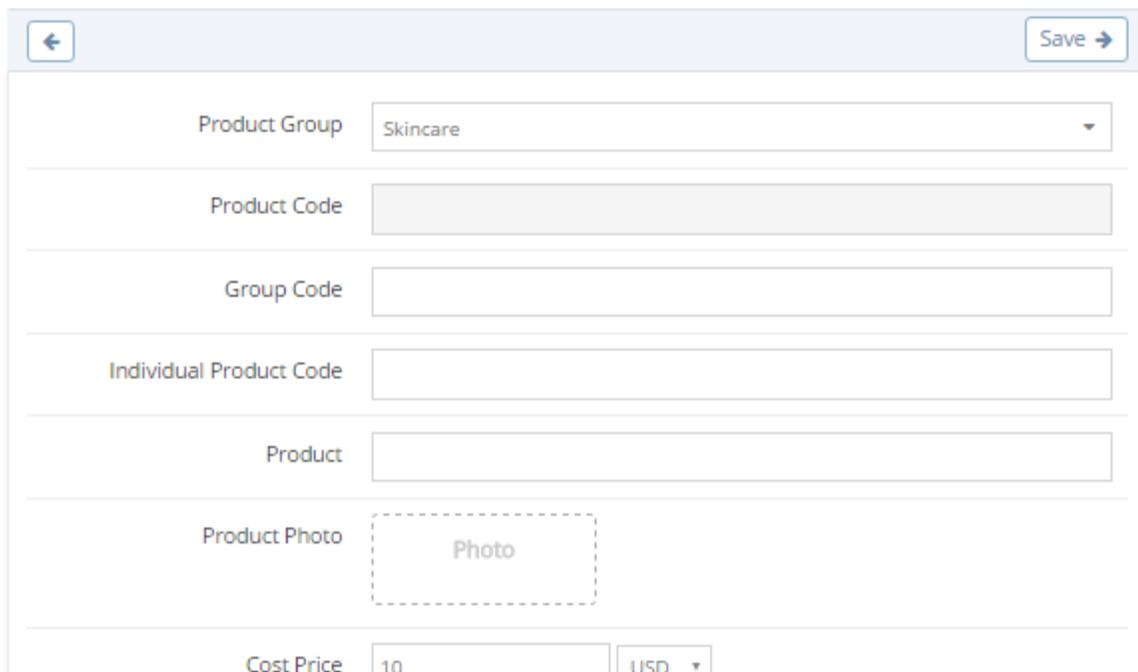


The screenshot shows the Moffice CRM interface. On the left is a sidebar menu with options: Dashboard, Products (selected), All Products, On Sale Products, Suspended Products, Deleted Products, Product Groups, and Competitors. The main content area is titled 'On Sale Products' and features a search bar for 'Product Name'. Below the search bar is a table with columns: Product Groups, Product Name, Price, Cost, and Sale Status. The table lists several products, each with a checkbox in the 'Product Groups' column.

<input type="checkbox"/>	Product Groups	Product Name	Price	Cost	Sale Status
<input type="checkbox"/>	Makeup / Lips / Li...	Doll Perfect Marionette Lipstick	21 USD	10 USD	-
<input type="checkbox"/>	Makeup / Face / P...	Doll Perfect Baby Puff Powder	15 USD	6 USD	-
<input type="checkbox"/>	Makeup / Face / P...	Doll Perfect Polish Primer	25 USD	10 USD	-
<input type="checkbox"/>	Makeup / Face / C...	Doll Perfect Invisible Concealer	23 USD	10 USD	-
<input type="checkbox"/>	Makeup / Eyes / S...	Doll Perfect Shadow Palette	24 USD	14 USD	-
<input type="checkbox"/>	Makeup / Lips / Li...	Doll Perfect Painted Lip Colour	20 USD	10 USD	-
<input type="checkbox"/>	Makeup / Face / F...	Doll Perfect Hydrating Foundation	30 USD	20 USD	-

While most of the creation page is fairly straightforward, some parts may seem a little confusing. We'll be going over some of these difficult parts. Under Product Group, you'll notice a gray field for Product Code. This is the automatically generating Product Code that Moffice CRM will create. No input is needed here.

On Sale Products



The screenshot shows the 'On Sale Products' creation page. It features a 'Save' button at the top right and a back arrow at the top left. The form contains several fields: 'Product Group' (a dropdown menu set to 'Skincare'), 'Product Code' (a grayed-out field), 'Group Code' (an empty text field), 'Individual Product Code' (an empty text field), 'Product' (an empty text field), 'Product Photo' (a dashed box labeled 'Photo'), and 'Cost Price' (a text field with '10' and a currency dropdown set to 'USD').

Another confusing part may be the cost input fields.
Here is an overview of what types of price data are needed for their product.

Cost Price: Cost to produce the product/services. This may include employees' time and hourly rate, supplier material costs, transportation logistics, and more.

Sale Price: Price of good or service charged to Customers

Supply Price: Minimum price at which a supplier or company agrees to supply the goods or services

Dealer Price: Price that the dealer pays to the manufacturer or supplier after receiving a good or service

Cost Price	<input type="text" value="10"/>	USD ▾
Sale Price	<input type="text" value="20"/>	USD ▾ (Price Including VAT)
Supply Price	<input type="text" value="18.18"/>	USD ▾ (Price Including VAT)
Dealer Price	<input type="text" value="15"/>	USD ▾

Selecting a Payment Method

Choosing payment methods is most possibly confusing portion when creating a new Product. Note that a similar screen will be used when adding a new Product Sale as well. To select a payment type, simply click the check box for the desired payment method. One product may utilize multiple payment methods.

One Time Payment

One Time Payments are single payments made for the good or service and will not repeat in the future.

Payment Method One Time Payment Deposit Periodic Payments

One Time Payment +

Payment Name -	<input type="text"/>	
Supply Price	<input type="text"/>	USD ▾ (Price Including VAT)
Payment Amount	<input type="text"/>	USD ▾ (Price Including VAT)
Cost	<input type="text"/>	USD ▾

Deposit

Deposit payments are payments are made, usually given with a refund, prepaid for your good or service ahead of time.

Payment Method One Time Payment Deposit Periodic Payments

Deposit +

Payment Name -	<input type="text"/>		
Supply Price	<input type="text"/>	USD ▾	(Price Including VAT)
Security Deposit	<input type="text"/>	USD ▾	(Price Including VAT)
Cost	<input type="text"/>	USD ▾	
Refund	<input type="text" value="0"/>	USD ▾	(Price Including VAT)

Periodic Payments

Periodic Payments are for recurring subscription payments that happen on a specific time basis. These can be weekly, biweekly, monthly, quarterly, yearly, etc.

Periodic Payments +

Payment Name -	<input type="text"/>		
Select Payment Frequency	<input type="text" value="1 Month"/>		
Select Payment Date	<input type="text" value="10"/>		
Supply Price	<input type="text"/>	USD ▾	(Price Including VAT)
Payment Amount Per Term	<input type="text"/>	USD ▾	(Price Including VAT)
Cost Per Unit	<input type="text"/>	USD ▾	