

ACT System

Basic **Activities** **Data** **Key-in**

By Associate



ACTIVITY MONITOR

	A	P	C	R	N
WEEKLY	0	0	0	0	0
TODAY	0	0	0	0	0

ANP	FYP	POLICY SIZE	CASES
-----	-----	-------------	-------

81,300	53,925	16,260	5
--------	--------	--------	---

China (FYP 100K by 31st Dec)81.30%	Japan (FYP 200K by 31st Dec)40.65%
------------------------------------	------------------------------------

18,700	118,700
--------	---------

PRODUCTIVITY	Undefined
--------------	-----------

20,325	0
--------	---

China Early Bird FYP 60,000	160.50%
-----------------------------	---------

Period: 01-01-2020 - 30-06-2020

HIGHLIGHTS



Congratulation

Let's congratulate **Royce Tok** on submitting a case **ANP2,400.00**. You are the star of the family. So proud of you!

HIGHLIGHTS

This is the "Main Page"



Congratulation

Let's congratulate **Ng Jim Hao** on submitting a case **ANP24,000.00**. You are the star of the family. So proud of you!

HIGHLIGHTS



After you **have met** with your prospect....

You may then key in your detail into **ACT System**

If you have planned earlier but you **didn't managed to meet him**, you may also need to key in your detail into **ACT System** for recording purposes.



ACTIVITY MONITOR

	A	P	C	R	N
WEEKLY	0	0	0	0	0
TODAY	0	0	0	0	0

ANP FYP POLICY SIZE CASES

81,300	53,925	16,260	5
--------	--------	--------	---

China (FYP 100K by 31st Dec) 81.30% Japan (FYP 200K by 31st Dec) 40.65%

18,700	118,700
--------	---------

PRODUCTIVITY Undefined

20,325	0
--------	---

China Early Bird FYP 60,000 160.50%

Period: 01-01-2020 - 30-06-2020

HIGHLIGHTS



Click Here

Congratulation

Let's congratulate **Royce Tok** on submitting a case **ANP2,400.00**. You are the star of the family. So proud of you!

HIGHLIGHTS



Congratulation

Let's congratulate **Ng Jim Hao** on submitting a case **ANP24,000.00**. You are the star of the family. So proud of you!

HIGHLIGHTS



ACTIVITY MONITOR

	A	P	C	R	N
WEEKLY	0	0	0	0	0
TODAY	0	0	0	0	0

ANP	FYP	POLICY SIZE	CASES
-----	-----	-------------	-------

81,300	53,925	16,260	5
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18,700	118,700
--------	---------

PRODUCTIVITY	Undefined
--------------	-----------


20,325	0
--------	---

China Early Bird FYP 60,000	160.50%
-----------------------------	---------

Period: 01-01-2020 - 30-06-2020

HIGHLIGHTS

New Customer



Cong

Edit Existing Customer

Congratulation
Let's congratulate **Royce Tok** on submitting a case **ANP2,400.00**. You are the star of the family. So proud of you!

Click Here

HIGHLIGHTS

Congratulations!

Congratulation
Let's congratulate **Ng Jim Hao** on submitting a case **ANP24,000.00**. You are the star of the family. So proud of you!

HIGHLIGHTS

Congratulations!



APPROACH

PRESENT

CLOSE

REFERRAL

NEW

APPROACH INFORMATION

Client Name:

Phone:

Date:

31-Mar-2020

Address:

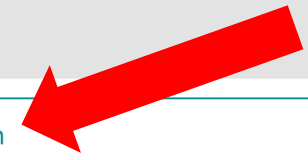
REMINDER (R1)

REMARK AFTER MEET (R1)

Status

Met	Not Seen
-----	----------

Click "Met" if you have approached the prospect, click "Not Seen" if you not meeting the prospect





APPROACH

PRESENT

CLOSE

REFERRAL

NEW

APPROACH INFORMATION

Client Name:

Testing

Introduced By:

Phone:

(012)3456-768

Date:

31-Mar-2020

Address:

Please key in your prospect name after your approach (Must key)

- 1. Name
- 2. Phone

REMINDER (R1)

Type...

Please key in message and reminder after you met

REMARK AFTER MEET (R1)

To present to him on family income

Status



APPROACH

PRESENT

CLOSE

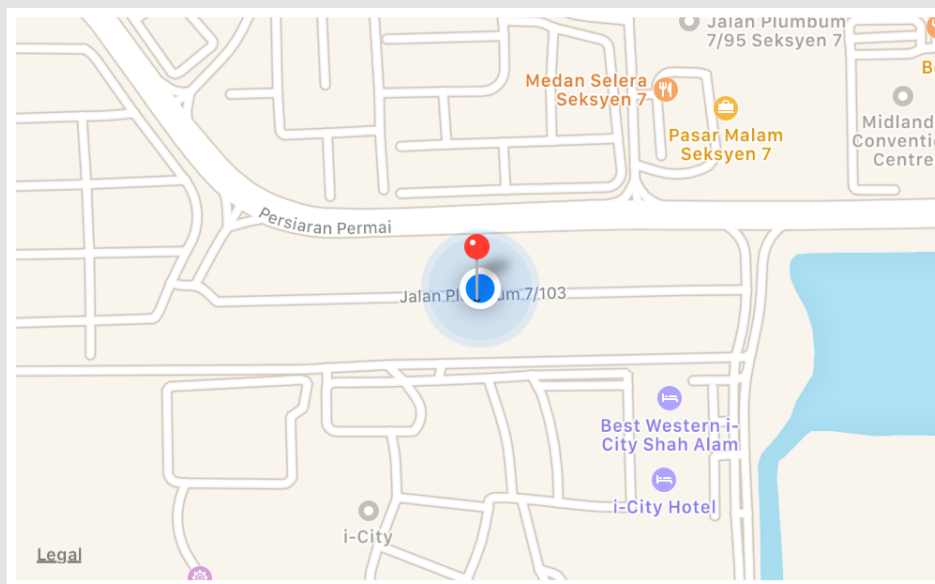
REFERRAL

NEW

Status

Met	Not Seen
-----	----------

EXTRA



Upload a Photo

Check-In with address

Upload photo

Delete

Save

Click here to save



If you **have met** your prospect after few days
for **presentation....**

Then key in your detail into **ACT System accordingly...**

ACTIVITY MONITOR

	A	P	C	R	N
WEEKLY	0	0	0	0	0
TODAY	0	0	0	0	0

ANP	FYP	POLICY SIZE	CASES
-----	-----	-------------	-------

81,300	53,925	16,260	5
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China (FYP 100K by 31st Dec)81.30%	Japan (FYP 200K by 31st Dec)40.65%
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18,700	118,700
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PRODUCTIVITY	Undefined
--------------	-----------

20,325	0
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China Early Bird FYP 60,000	160.50%
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Period: 01-01-2020 - 30-06-2020

HIGHLIGHTS

New Customer

Edit Existing Customer

Congratulation

Let's congratulate **Royce Tok** on submitting a case. You are the star of the family. So proud of you!

HIGHLIGHTS

Congratulations!

Congratulation

Let's congratulate **Ng Jim Hao** on submitting a case **ANP24,000.00**. You are the star of the family. So proud of you!

HIGHLIGHTS

Click Existing Customer to key in PRESENTATION details



Existing Customer

🔍 Type Here...

👤 Testing

🕒 2020-03-26
14:14:34

☎️ (012)3456-768



**Select the Prospect Name
that you have PRESENTED**

👤 Choo

🕒 2020-03-23
14:23:07

☎️ (019)8876-540



👤 Wai man

🕒 2020-03-23
14:17:52

☎️ (016)5456-378



👤 Yong

🕒 2020-03-20
14:33:28

☎️ (012)3434-567



👤 HOO

🕒 2020-03-20
14:29:12

☎️ (014)3454-567



APPROACH

PRESENT



CLOSE

REFERRAL

NEW

APPROACH INFORMATION

Client Name:	Testing
Introduced By:	
Phone:	(012)3456-768
Date:	31-Mar-2020
Address:	

This page will appear as Default page

Then, click the "PRESENT" to key in information

REMINDER (R1)

Type...

REMARK AFTER MEET (R1)

To present to him on family income

Status



APPROACH

PRESENT

CLOSE

REFERRAL

NEW

PRESENT INFORMATION

Client Name:	Testing
Introduced By:	
Phone:	(012)3456-768
Date:	31-Mar-2020
Address:	
Potential ANP:	6,500
Potential Fund:	000
Potential Loan:	000

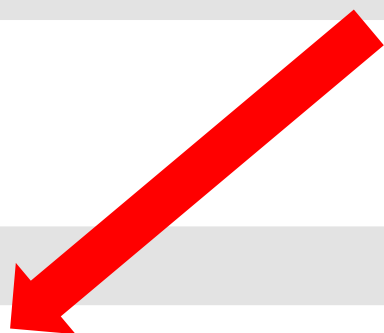
Please key in the potential ANP that you have proposed to him via your presentation during your meeting

Also to key in message and reminder after your meeting



REMINDER (R1)

To present to him on family income



REMARK AFTER MEET (R1)

He wanted healthcare plan



APPROACH

PRESENT

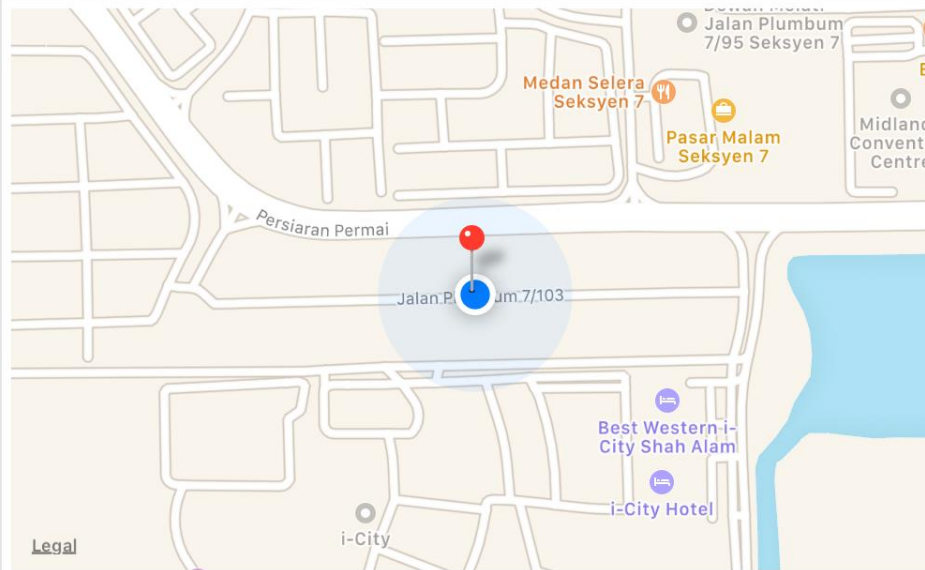
CLOSE

REFERRAL

NEW

He wanted healthcare plan

EXTRA



Upload a Photo

Check-In with address

Upload photo

Delete

Save

Click here to save

If you have **Successfully Closed** your case
later.....

Then key in your detail into **ACT System accordingly...**

ACTIVITY MONITOR

	A	P	C	R	N
WEEKLY	0	0	0	0	0
TODAY	0	0	0	0	0

ANP	FYP	POLICY SIZE	CASES
-----	-----	-------------	-------

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20,325	0
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China Early Bird FYP 60,000	160.50%
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Period: 01-01-2020 - 30-06-2020

HIGHLIGHTS

New Customer

Edit Existing Customer

Congratulation

Let's congratulate **Royce Tok** on submitting a case. You are the star of the family. So proud of you!

HIGHLIGHTS

Congratulations!

Congratulation

Let's congratulate **Ng Jim Hao** on submitting a case **ANP24,000.00**. You are the star of the family. So proud of you!

HIGHLIGHTS

Click Existing Customer to key in your Successful Closed case details



Existing Customer

🔍 Type Here...

👤 Testing

🕒 2020-03-26
14:14:34

☎ (012)3456-768



**Select the Prospect Name
that you have CLOSED**

👤 Choo

🕒 2020-03-23
14:23:07

☎ (019)8876-543



👤 Wai man

🕒 2020-03-23
14:17:52

☎ (016)5456-378



👤 Yong

🕒 2020-03-20
14:33:28

☎ (012)3434-567



👤 HOO

🕒 2020-03-20
14:29:12

☎ (014)3454-567



APPROACH

PRESENT

CLOSE

REFERRAL

NEW



APPROACH INFORMATION

Client Name:

Testing

Introduced By:

Phone:

(012)3456-768

Date:

31-Mar-2020

Address:

**This page will appear as Default page
Then, click the "CLOSE" to key in information**

REMINDER (R1)

Type...

REMARK AFTER MEET (R1)

To present to him on family income

Status

[Empty input field]



APPROACH

PRESENT

CLOSE

REFERRAL

NEW

CLOSE INFORMATION

Client Name: Testing

Introduced By:

Phone: (012)3456-768

Date: 31-Mar-2020

Address:

ANP (RM): 24,000

FYP (RM): 12,000

Funds: 0

Funds Remarks...

Loan: 0



Please key in the actual ANP that you have closed. Don't worry about the FYP amount, FYP amount will automatically change if you choose a different frequency of payment

Also to key in message and reminder after your meeting



APPROACH

PRESENT

CLOSE

REFERRAL

NEW

Loan:

0

Loan Remarks...

Please select method of payment and the frequency of payment accordingly.
Also to key in message and reminder after your meeting

Payment Mode

Direct Pay

Credit Card

Debit Card

Autopay

Payment Frequency

A

S

Q

M

REMINDER (R1)

He wanted healthcare plan

REMARK AFTER MEET (R1)

Type...



APPROACH

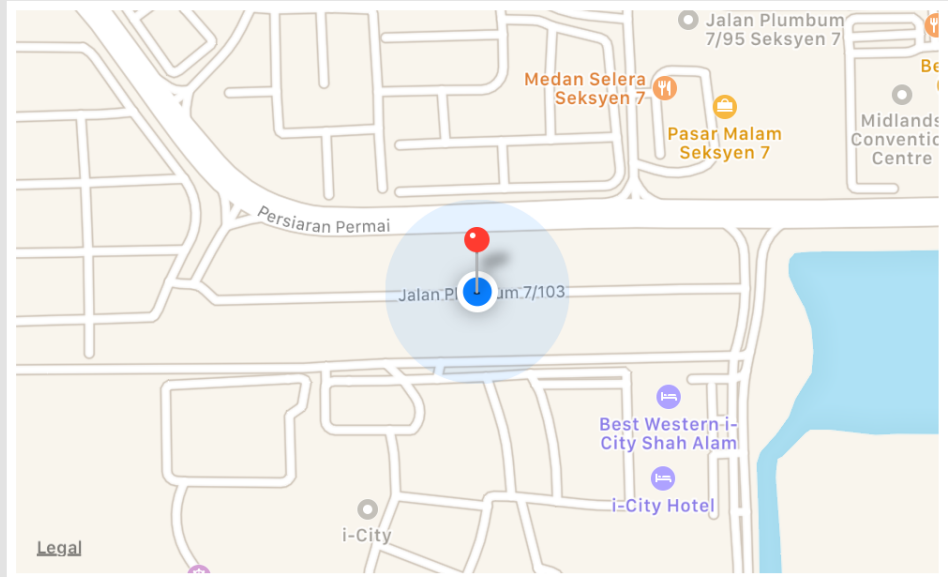
PRESENT

CLOSE

REFERRAL

NEW

EXTRA



Check-In with address

Upload photo

Delete

Save

Click here to save



If your client give **Sales Referral leads**
to you....

Then key in your detail into **ACT System accordingly...**

ACTIVITY MONITOR

	A	P	C	R	N
WEEKLY	0	0	0	0	0
TODAY	0	0	0	0	0

ANP	FYP	POLICY SIZE	CASES
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18,700	118,700
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PRODUCTIVITY	Undefined
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20,325	0
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China Early Bird FYP 60,000 160.50%

Period: 01-01-2020 - 30-06-2020

HIGHLIGHTS

New Customer

Edit Existing Customer

Congratulation

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HIGHLIGHTS

Congratulations!

Congratulation

Let's congratulate **Ng Jim Hao** on submitting a case **ANP24,000.00**. You are the star of the family. So proud of you!

HIGHLIGHTS

Click Existing Customer to key in your Sales Referral Leads details



Type Here...

Testing

2020-03-26
14:14:34

(012)3456-768



Choo

Select the Prospect Name that have given you the Sales Referral Leads

2020-03-23
14:23:07

(019)8876-54



Wai man

2020-03-23
14:17:52

(016)5456-378



Yong

2020-03-20
14:33:28

(012)3434-567



HOO

2020-03-20
14:29:12

(014)3454-567



APPROACH

PRESENT

CLOSE

REFERRAL

NEW



APPROACH INFORMATION

Client Name:

Testing

Introduced By:

Phone:

(012)3456-768

Date:

31-Mar-2020

Address:

**This page will appear as Default page
Then, click the "REFERRAL" to key in information**

REMINDER (R1)

Type...

REMARK AFTER MEET (R1)

To present to him on family income

Status



APPROACH

PRESENT

CLOSE

REFERRAL

NEW

CLIENT INFORMATION

Client Name:	Testing
Introduced By:	
Phone:	(012)3456-768
Date:	31-Mar-2020
Address:	

REFERRAL INFORMATION

Then, click the "Add Referral" to key in information



Add Referral



Name :
Introduced By : Testing
Phone :
Date : 31-Mar-2020
Source Name :

You may key in the Sales Referral Leads details and click Sales, meaning is for sales approach in future. Then click "Done"

Sales Recruit

Remarks



APPROACH

PRESENT

CLOSE

REFERRAL

NEW

Introduced By:

Phone:

(012)3456-768

Date:

31-Mar-2020

Address:

REFERRAL INFORMATION

Name	Testing2	31-Mar-2020
Introduced By	Testing	<input checked="" type="radio"/> Sales <input type="radio"/> Recruit
Phone	(109)4565-676	
Source	Known Through Hobbies/Games	
Remarks		
		Delete

This page appear after you have click the "Done" , kindly check and verify the Sales Referral Leads details

Add Referral

EXTRA





APPROACH

PRESENT

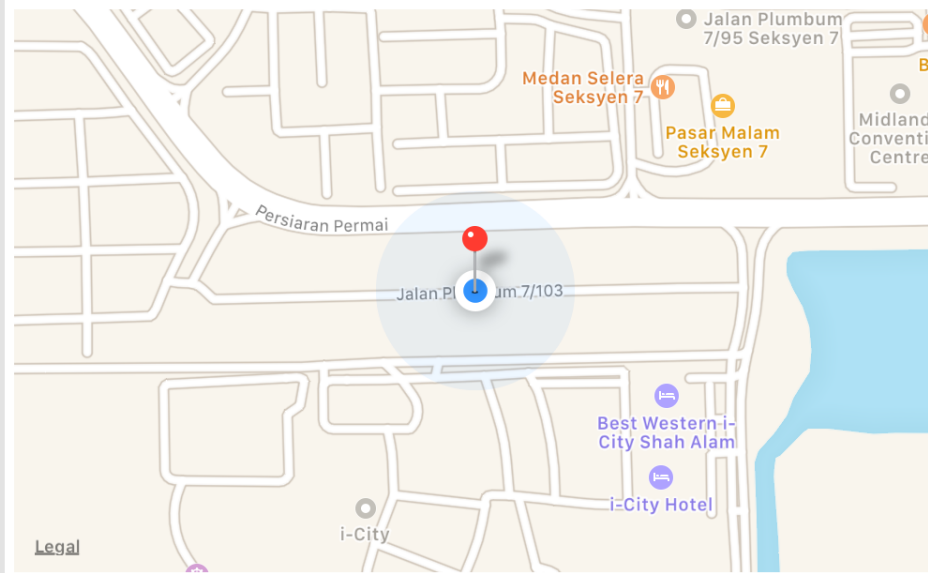
CLOSE

REFERRAL

NEW

Add Referral

EXTRA



Then, click the "SAVE" if the Sales Referral Leads details is correct

Check-In with address

Upload photo

Delete

Save



To check whether your **Sales Referral leads**
are **properly keyed**.....

Please refer to **next page** for the *retrieve* of information.



Menu

My Account

R50

P100

Financial Report

Report

Search

Agent Hierarchy

Search Activities

Search Policy

Log out

v1.0.1.0.6



You can click P100 to check and retrieve the Sales Referral Leads information

ACTIVITY MONITOR

	A	P	C	R	N
WEEKLY	0	0	0	0	0
TODAY	0	0	0	0	0

POLICY SIZE

CASES

16,260

5

China (FYP 100K by 31st Dec)81.30%

Japan (FYP 200K by 31st Dec)40.65%

18,700

118,700

PRODUCTIVITY

Undefined

20,325

0

China Early Bird FYP 60,000

160.50%

Period: 01-01-2020 - 30-06-2020

HIGHLIGHTS



Congratulation

Let's congratulate Royce Tok the star of the family. So proud

HIGHLIGHTS



Congratulation

Let's congratulate Ng Jim Ha are the star of the family. So pr

HIGHLIGHTS

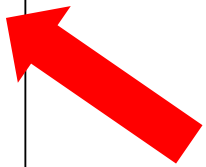


0

1

Source of Names		Source Letter	B	L	I
A.Relatives B.School Friend C.Neighbors D.Colleagues/Former Colleagues E.Known Through Spouse F.Known Through Children G.Known Through Hobbies/Games H.Known Through Church/Temple I.Known Through Social Groups J.Known Through Public Services K.Newly Married Couple L.New Job Or Promotion M.New Homeowners N.People with whom you do business	Source Name		11. NAME: Yong PHONE: 012-3434567	12. NAME: Choo PHONE: 019-8876543	13. NAME: Testing 2 PHONE: 019-5678765
	Annual Income	RM50,000 or Below			
		RM 50,001 - RM 100,000			x
		RM 100,001 - RM 300,000			x
		RM 300,001 - RM 500,000			
		Above RM 500,000			
	Age	Below 25			x
		25 - 40			x
		41 - 55			

Click here to save



This is your Sales Referral Lead keyed. You may then select downwards on the relevant information on this leads.

Then, click the above to save

If your client give **Recruiting Referral leads**
to you....

Then key in your detail into **ACT System accordingly..**

ACTIVITY MONITOR

	A	P	C	R	N
WEEKLY	0	0	0	0	0
TODAY	0	0	0	0	0

ANP	FYP	POLICY SIZE	CASES
-----	-----	-------------	-------

81,300	53,925	16,260	5
--------	--------	--------	---

China (FYP 100K by 31st Dec)81.30% Japan (FYP 200K by 31st Dec)40.65%

18,700	118,700
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PRODUCTIVITY	Undefined
--------------	-----------

20,325	0
--------	---

China Early Bird FYP 60,000 160.50%

Period: 01-01-2020 - 30-06-2020

HIGHLIGHTS

New Customer

Edit Existing Customer

Congratulation

Let's congratulate **Royce Tok** on submitting a case. You are the star of the family. So proud of you!

HIGHLIGHTS

Congratulations!

Congratulation

Let's congratulate **Ng Jim Hao** on submitting a case **ANP24,000.00**. You are the star of the family. So proud of you!

HIGHLIGHTS

Click Existing Customer to key in your Recruiting Referral Leads details



Type Here...

Testing

2020-03-26
14:14:34

(012)3456-768



Choo

Select the Prospect Name that have given you the Recruiting Referral Leads

2020-03-23
14:23:07

(019)8876-54



Wai man

2020-03-23
14:17:52

(016)5456-378



Yong

2020-03-20
14:33:28

(012)3434-567



HOO

2020-03-20
14:29:12

(014)3454-567



APPROACH

PRESENT

CLOSE

REFERRAL

NEW



APPROACH INFORMATION

Client Name:

Testing

Introduced By:

Phone:

(012)3456-768

Date:

31-Mar-2020

Address:

This page will appear as Default page
Then, click the "NEW" to key in information

REMINDER (R1)

Type...

REMARK AFTER MEET (R1)

To present to him on family income

Status



APPROACH

PRESENT

CLOSE

REFERRAL

NEW

CLIENT INFORMATION

Client Name:	Testing
Introduced By:	
Phone:	(012)3456-768
Date:	31-Mar-2020
Address:	

RECRUIT INFORMATION

Then, click the "Add New" to key in information



Add New



Name :

Introduced By : Testing

Phone :

Date : 31-Mar-2020

Source Name :

You may key in the Recruiting Referral Leads details (Name & Phone) and click "Recruit".
Then click "Done"

Sales Recruit

Remarks



APPROACH

PRESENT

CLOSE

REFERRAL

NEW

CLIENT INFORMATION

Client Name: Testing

Introduced By:

Phone: (012)3456-768

Date: 31-Mar-2020

Address:

RECRUIT INFORMATION

Name	Recruit	31-Mar-2020
Introduced By	Testing	<input type="button" value="Sales"/> <input checked="" type="button" value="Recruit"/>
Phone	(015)4324-567	
Source	Colleagues/Former Colleagues	
Remarks		

[Delete](#)

This page appear after you have click the "Done" to verify the Recruiting Referral Leads details

Add New

APPROACH

PRESENT

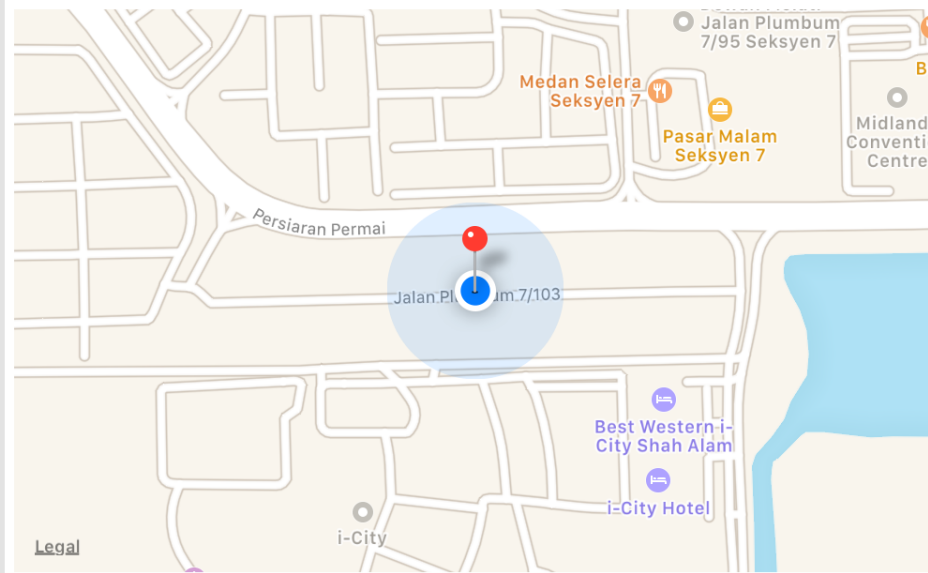
CLOSE

REFERRAL

NEW

Add New

EXTRA



Then, click the "SAVE" if the Recruiting Referral Leads details is correct

Check-In with address

Upload photo

Delete

Save



To check whether your **Recruiting Referral leads** are **properly keyed**.....

Please refer to **next page** for the *retrieve* of information.

Menu

My Account

R50

P100

Financial Report

Report

Search

Agent Hierarchy

Search Activities

Search Policy

Log out

v1.0.1.0.6



ACTIVITY MONITOR

	A	P	C	R	N
WEEKLY	0	0	0	0	0
			0	0	0

You can click R50 to check and retrieve the Recruiting Referral Leads information

81,300 53,925 16,260 5

China (FYP 100K by 31st Dec)81.30% Japan (FYP 200K by 31st Dec)40.65%

18,700 118,700

PRODUCTIVITY Undefined

20,325 0

China Early Bird FYP 60,000 160.50%

Period: 01-01-2020 - 30-06-2020

HIGHLIGHTS



Congratulation Let's congratulate Royce Tok a the star of the family. So proud

HIGHLIGHTS



Congratulation Let's congratulate Ng Jim Ha are the star of the family. So pr

HIGHLIGHTS



0

Source of Names		Source Letter	A	A	A	B	B	
A.Relatives B.School Friend C.Neighbors D.Colleagues/Former Colleagues E.Known Through Spouse F.Known Through Children G.Known Through Hobbies/Games H.Known Through Church/Temple I.Known Through Social Groups J.Known Through Public Services K.Newly Married Couple L.New Job Or Promotion M.New Homeowners N.People with whom you do business	Source Name		2. NAME: Adam PHONE: 016-3302324	3. NAME: Felicia PHONE: 017-5674432	4. NAME: Tita PHONE: 019-8787765	5. NAME: Recruit PHONE: 016-3301218	6. NAME: HOO PHONE: 014-3454567	7. NAME: Recruit PHONE: 013-5545678
	Annual Income	RM50,000 or Below						
		RM 50,001 - RM 100,000						
		RM 100,001 - RM 300,000						
		RM 300,001 - RM 500,000		X				
		Above RM 500,000						
	Age	Below 25						
25 - 40								
41 - 55			X					

Click here to save

This is your Recruiting Referral Leads keyed. You may then select downwards on the relevant information on this leads.

Then, click the above to save

To check your **Activities Records** from the
ACT System.....

Please refer to **next page** for the *retrieve* of information.

Menu

My Account

R50

P100

Financial Report

Report

Search

Agent Hierarchy

Search Activities

Search Policy

Log out

v1.0.1.0.6



ACTIVITY MONITOR

	A	P	C	R	N
WEEKLY	0	0	0	0	0
TODAY	0	0	0	0	0

ANP	FYP	POLICY SIZE	CASES
-----	-----	-------------	-------

81,300 53,925 16,260 5

China (FYP 100K by 31st Dec)81.30% Japan (FYP 200K by 31st Dec)40.65%

18,700 118,700

PRODUCTIVITY Undefined

20,325 0

160.50%

HIGHLIGHTS



Congratulation

Let's congratulate **Royce Tok** the star of the family. So proud

HIGHLIGHTS



Congratulation

Let's congratulate **Ng Jim Ha** are the star of the family. So pr

HIGHLIGHTS

You may click Search Activities to check and retrieve your Activities Records





Search Activities

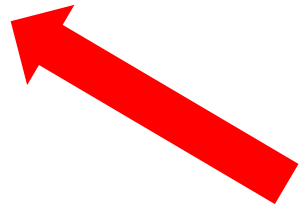
-

Select the range of dates



- All **5**
- Approach **1**
- Present **1**
- Close **1**
- Referral **1**
- New **1**

Name:	Testing	2020-03-26 14:08:17
Activity:	Approach	
Introduced By:		
Name:	Testing	2020-03-26 14:10:53
Activity:	Present	
Potential ANP:	6,500	
Introduced By:		
Name:	Testing	2020-03-26 14:14:35
Activity:	Close	
ANP:	24,000	
Introduced By:	ANDY TANG	
Name:	Testing 2	2020-03-26 14:17:18
Activity:	Referral	



This shows the entire activities for the particular dates

You may click one by one to check in details



Search Activities

26-Mar-2020

-

26-Mar-2020

- All **1**
- Approach 1**
- Present
- Close
- Referral
- New

Name: Testing

2020-03-26
14:08:17

Activity: Approach

Introduced By:



**If you click "Approach",
then the relevant
records will be shown**



Search Activities

26-Mar-2020

-

26-Mar-2020

- All **1**
- Approach
- Present 1**
- Close
- Referral
- New

Name: Testing

Activity: Present

Potential ANP: 6,500

Introduced By:



**2020-03-26
14:10:53**

**If you click "Present",
then the relevant
records will be shown**



Search Activities

26-Mar-2020

-

26-Mar-2020

- All **1**
- Approach
- Present
- Close 1**
- Referral
- New

Name: Testing

2020-03-16
14:14:33

Activity: Close

ANP: 24,000

Introduced By: ANDY TANG



**If you click "Close",
then the relevant
records will be shown**



Search Activities

26-Mar-2020

-

26-Mar-2020

- All **1**
- Approach
- Present
- Close
- Referral 1**
- New

Name: Testing 2

2020-03-26
14:17:18

Activity: Referral

Introduced By: TESTING



**If you click "Referral",
then the relevant
records will be shown**



ACTIVITY MONITOR

	A	P	C	R	N
WEEKLY	0	0	0	0	0
TODAY	0	0	0	0	0

ANP	FYP	POLICY SIZE	CASES
81,300	53,925	16,260	5

China (FYP 100K by 31st Dec)81.30%	Japan (FYP 200K by 31st Dec)40.65%
18,700	118,700

PRODUCTIVITY	Undefined
20,325	0

China Early Bird FYP 60,000	160.50%
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Period: 01-01-2020 - 30-06-2020

HIGHLIGHTS



Congratulation

Let's congratulate **Royce Tok** on submitting a case **ANP2,400.00**. You are the star of the family. So proud of you!

HIGHLIGHTS

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Congratulation

Let's congratulate **Ng Jim Hao** on submitting a case **ANP24,000.00**. You are the star of the family. So proud of you!

HIGHLIGHTS



*Happy Prospecting
& Marketing*