PRINTFORM
CLOUD MANUFACTURING

RESEARCH

User Guide

Version 1.0

ORISON
INFO SYSTEM PVT.LTD

©2025 Orison Infosystem Pvt. Ltd.

All rights reserved. Proprietary and Confidential

Content

1.Introduction.....

2.Accessing the Research Module.....

3.Creating a New Research Company.....

3.1 Filling the research Form.....

3.2 Existing company.....

4.Viewing Research Information.....

4.1 Industry- wise Filtering

5..Editing Research Information

1.1 Quick Edit .....

1.2 Full Edit Mode.....

©2025 Orison Infosystem Pvt. Ltd.

All rights reserved. Proprietary and Confidential

1.Introduction

The **Research Module** in Mcloud allows users to:

- Add new research company details.
- View and edit existing research records.
- Track leads and assign them to team members.

©2025 Orison Infosystem Pvt. Ltd.

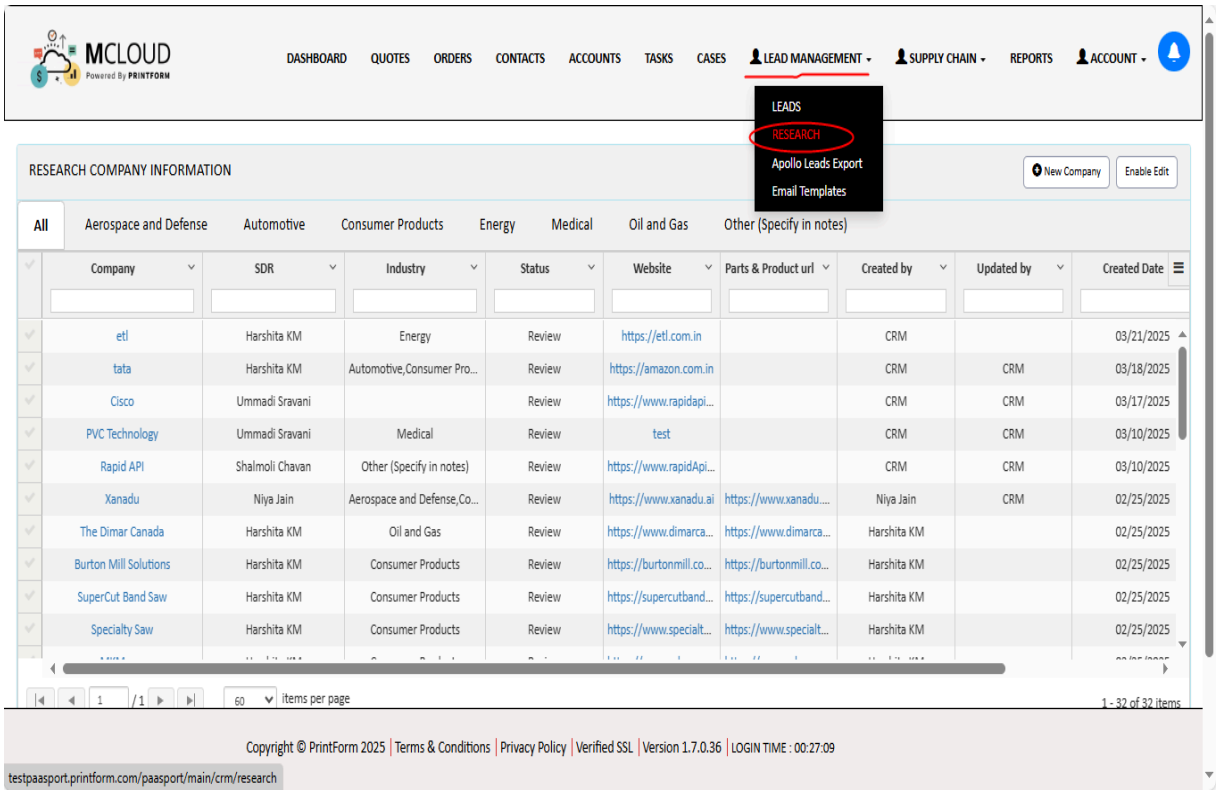
All rights reserved. Proprietary and Confidential

2.Accessing the Research Module

- Log in to Mcloud.

  Link-[PrintForm | Prototype To Production | CRM]

- Go to **Lead Management** in the main menu.
- Click on the **Research** subtab.



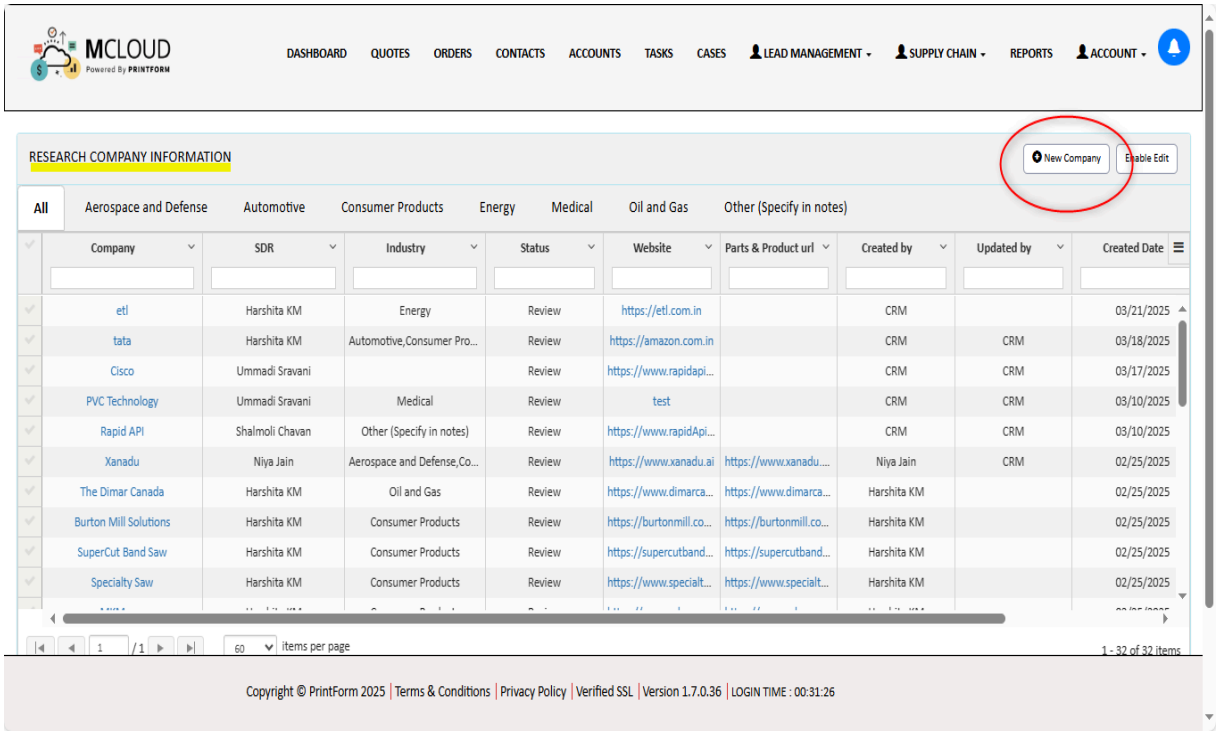
©2025 Orison Infosystem Pvt. Ltd.

All rights reserved. Proprietary and Confidential

3.Creating a New Research Company

3.1 Filling the Research Form

- 1. Click New Company in the Research subtab.



- 2. Fill in the following fields:

Mandatory Fields (Marked with)

➔ **SDR***: Dropdown selection (no options visible in snippet).

➔ **Company***: Text input (Start typing the Company Name)

➔ **Website***: Text/past Url

©2025 Orison Infosystem Pvt. Ltd.

All rights reserved. Proprietary and Confidential

2. Optional Fields

- ➔ Parts & Products URL: Empty field (likely for additional links).
- ➔ Notes: Empty text area for free-form input.

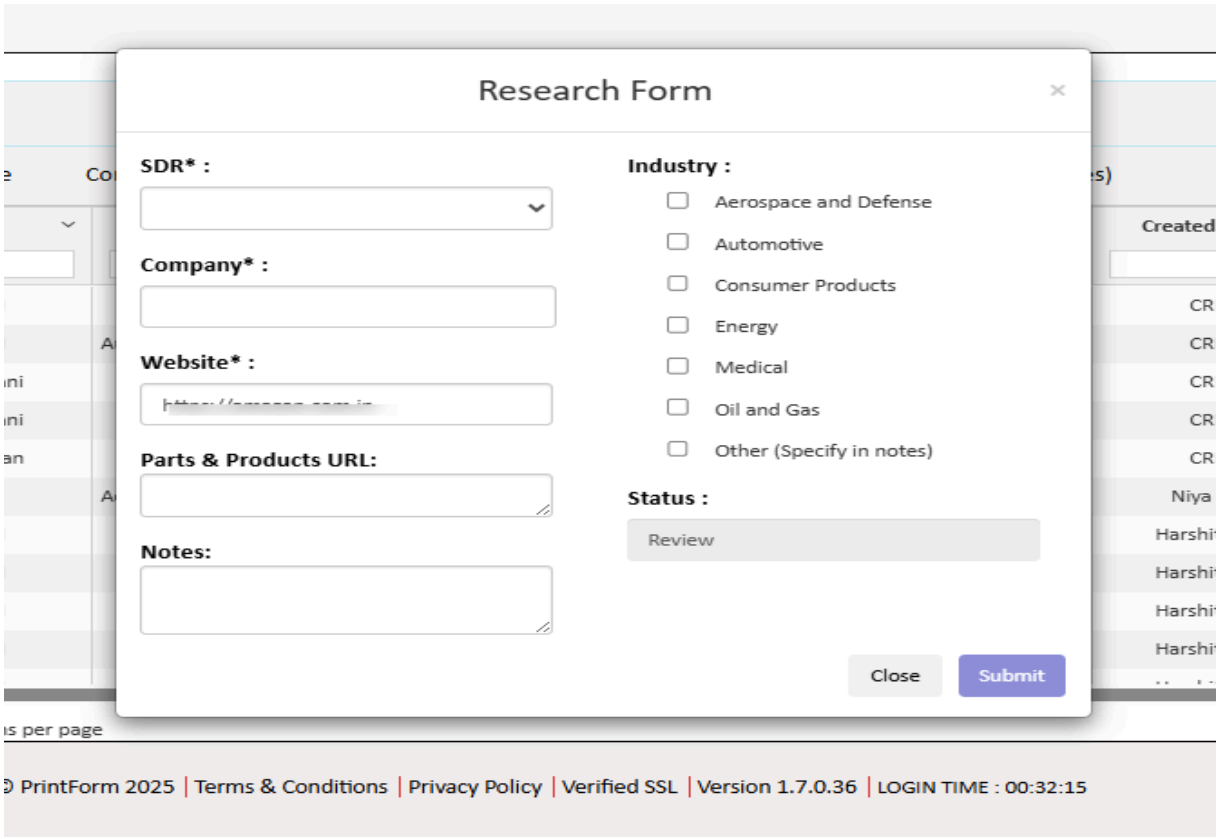
3. Dropdown Selections

- ➔ Industry:
  - ◆ Aerospace and Defense
  - ◆ Automotive
  - ◆ Consumer Products
  - ◆ Energy
  - ◆ Medical
  - ◆ Oil and Gas
  - ◆ Other (requires specification in *Notes*).
- ➔ Status:
  - ◆ *Review* (selected; other options not visible).

©2025 Orison Infosystem Pvt. Ltd.

All rights reserved. Proprietary and Confidential

.



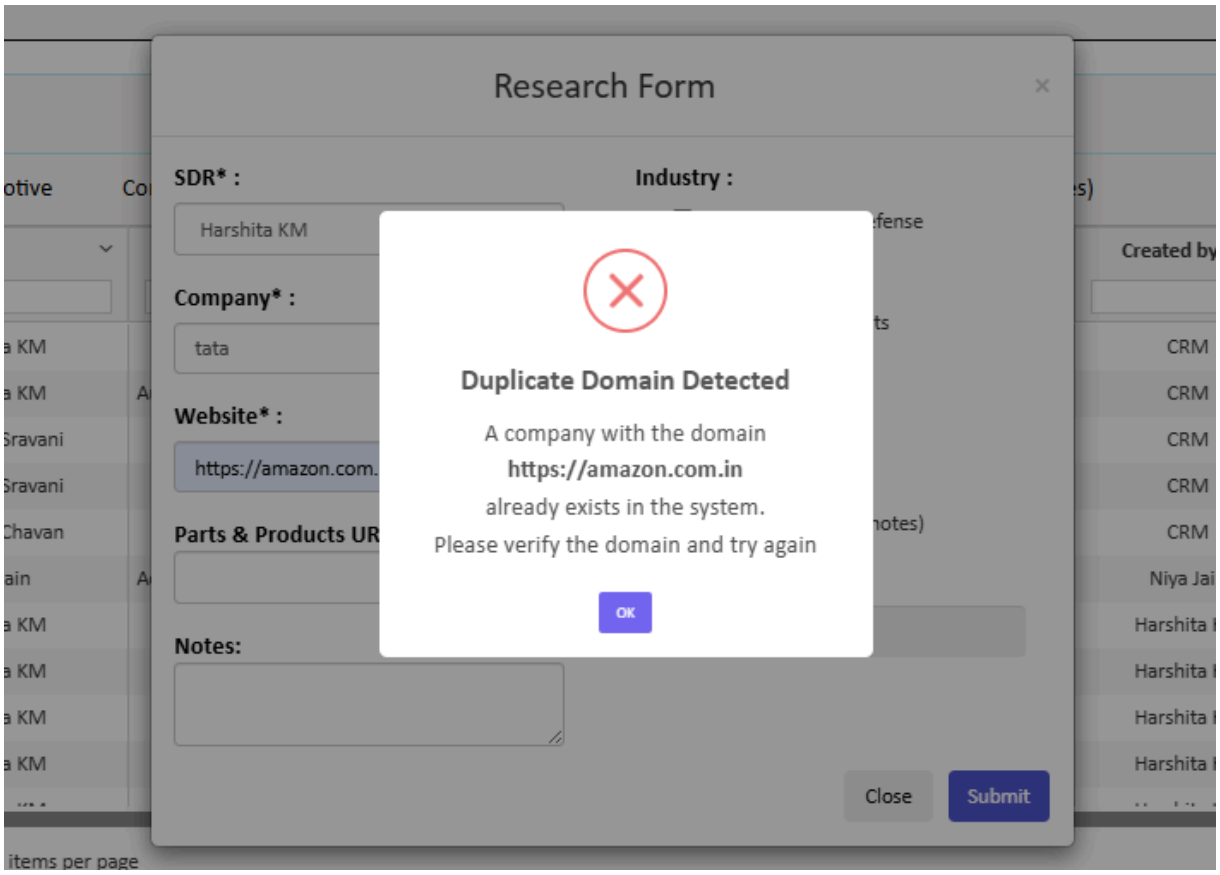
- Once user fill all details Click on submit button it will save .
- Also user can click on close button to discard all info

©2025 Orison Infosystem Pvt. Ltd.

All rights reserved. Proprietary and Confidential

3.2 Existing company

- If user enter existing website /domain an alert will be shown on the screen



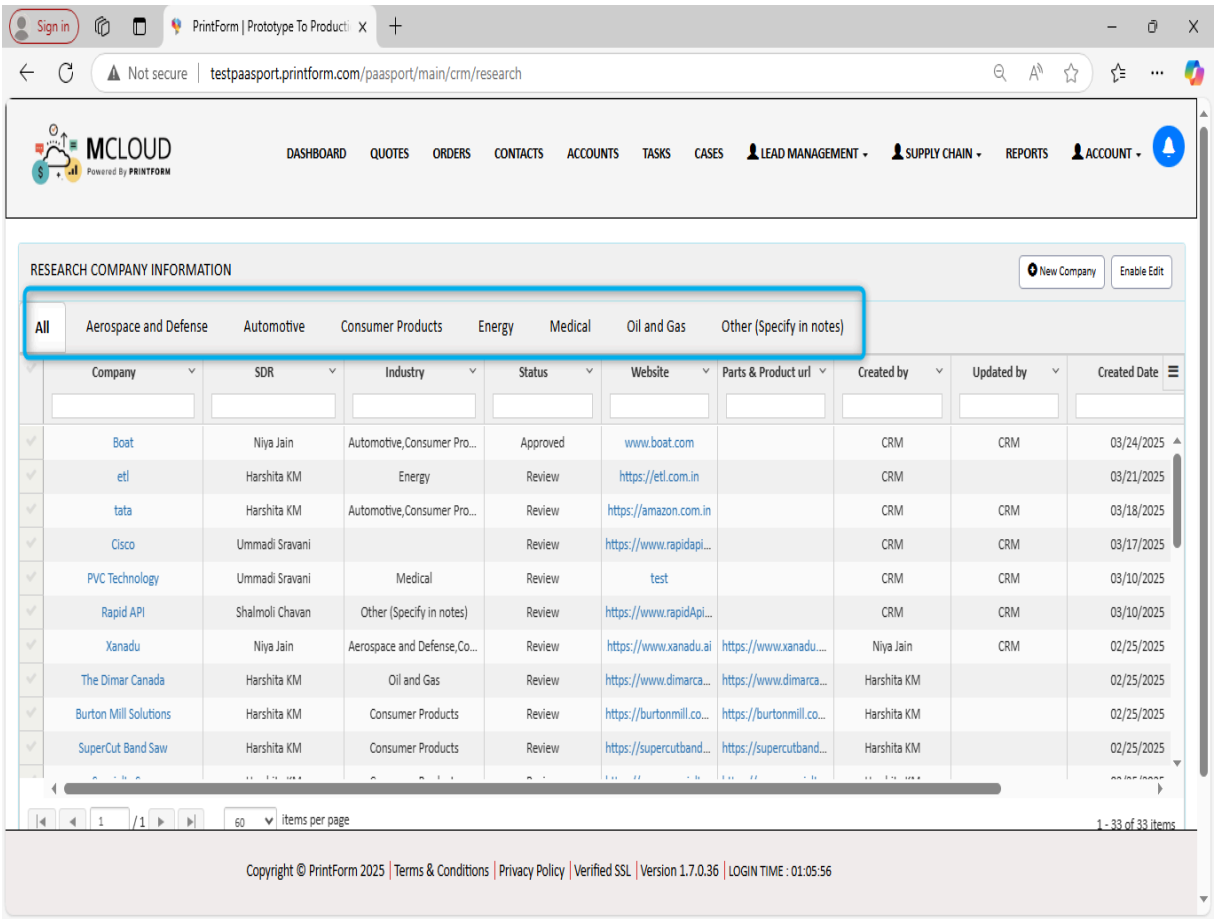
©2025 Orison Infosystem Pvt. Ltd.

All rights reserved. Proprietary and Confidential

4.Viewing Research Information

4.1 Industry- wise Filtering

- Companies are grouped by Industry (e.g ,Aerospace, Medical, oil & gas etc)
- Click an Industry to filter records.



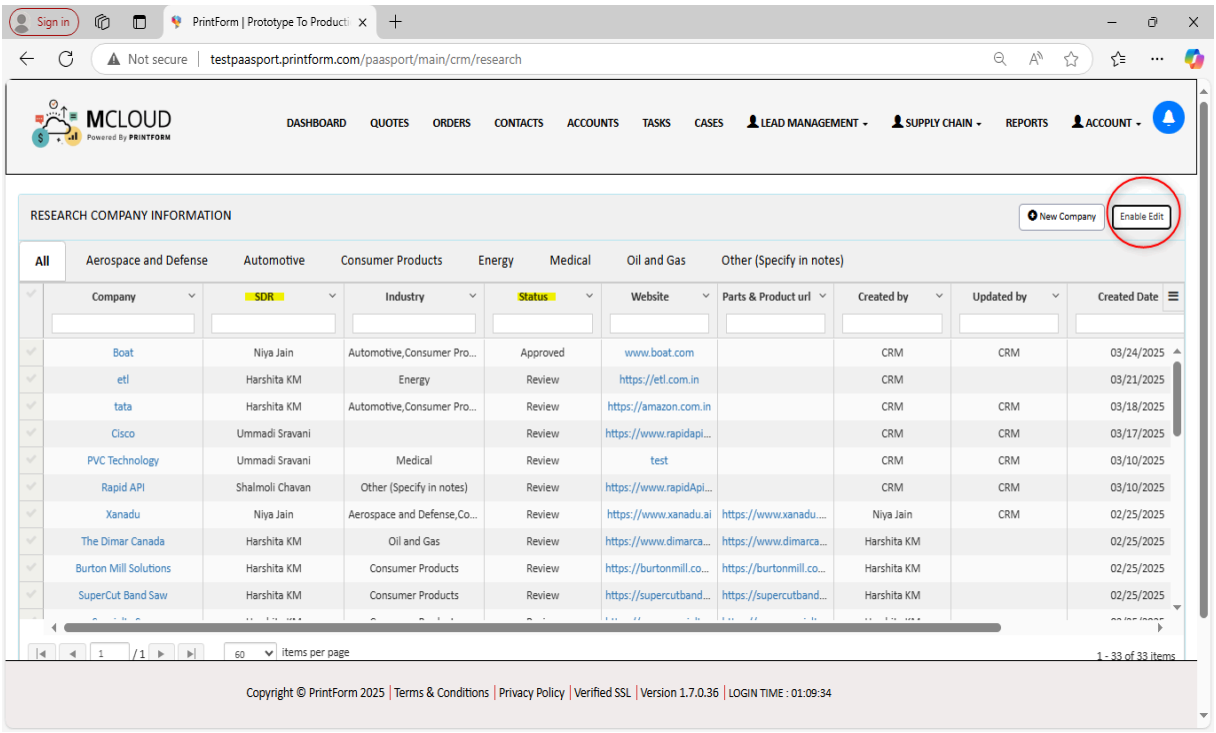
©2025 Orison Infosystem Pvt. Ltd.

All rights reserved. Proprietary and Confidential

5.Editing Research Information

5.1 Quick Edit

- Click the enable(edit) button next to new company tab.
- User can Update - Status & SDR
- Status(Approved/Unapproved)
- After editing user will get pop up message of Modify successfully .

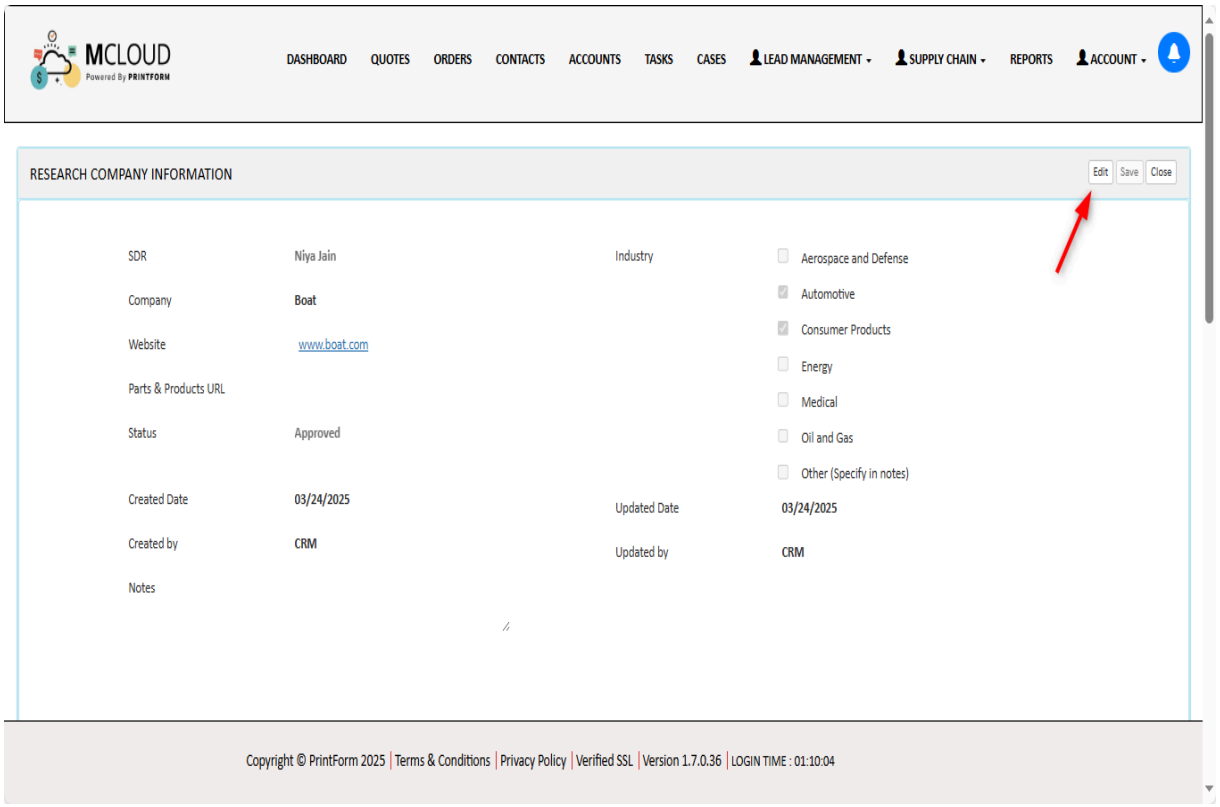


©2025 Orison Infosystem Pvt. Ltd.

All rights reserved. Proprietary and Confidential

5.2 Full Edit Mode

- Click on company Name to open its Full Record.
- Click on EDIT to modify fields .
- Make changes and Click on SAVE and CLOSE.



©2025 Orison Infosystem Pvt. Ltd.

All rights reserved. Proprietary and Confidential

©2025 Orison Infosystem Pvt. Ltd.

All rights reserved. Proprietary and Confidential