



# RESEARCH

## User Guide

Version 1.0



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## 1.Introduction

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

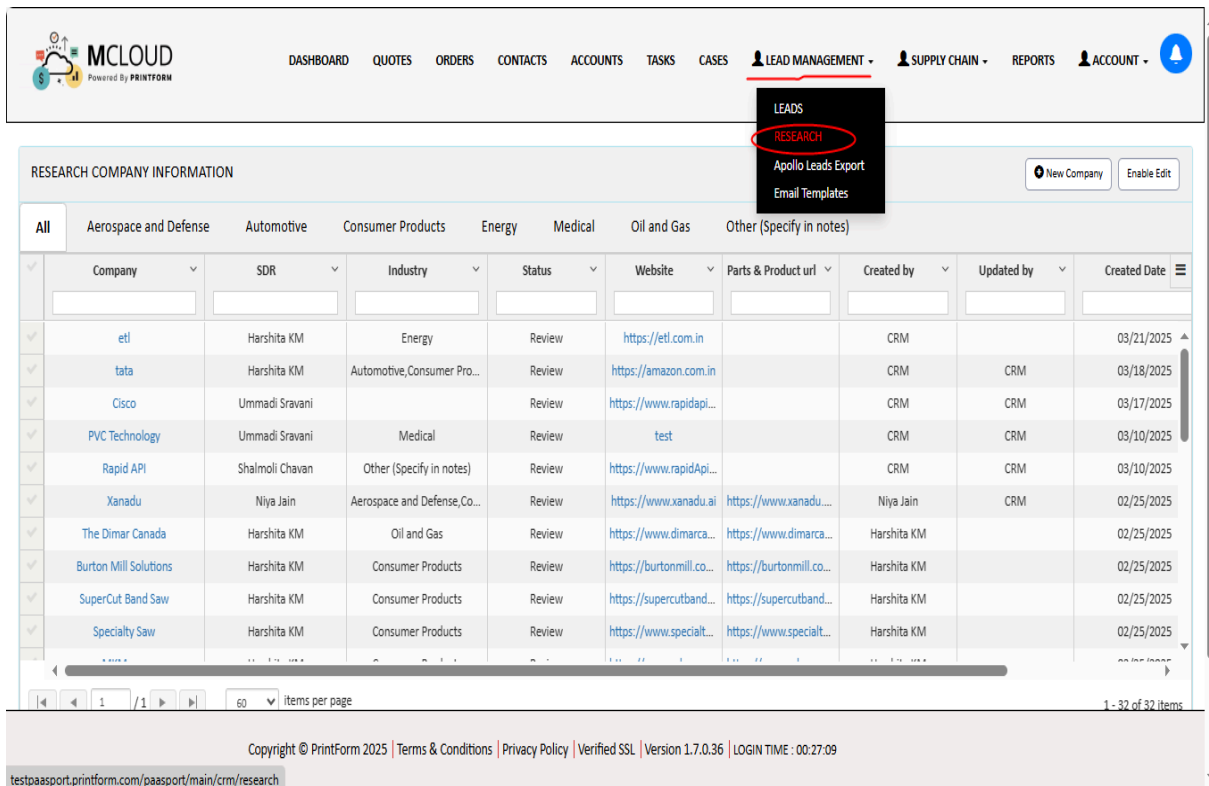
- Add new research company details.
- View and edit existing research records.
- Track leads and assign them to team members.

## 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.



The screenshot shows the Mcloud Research module interface. The top navigation bar includes links for DASHBOARD, QUOTES, ORDERS, CONTACTS, ACCOUNTS, TASKS, CASES, LEAD MANAGEMENT (highlighted), SUPPLY CHAIN, REPORTS, and ACCOUNT. A dropdown menu for LEAD MANAGEMENT is open, showing options: LEADS, RESEARCH (highlighted), Apollo Leads Export, and Email Templates. The main content area is titled 'RESEARCH COMPANY INFORMATION' and features a table with columns: Company, SDR, Industry, Status, Website, Parts & Product url, Created by, Updated by, and Created Date. The table lists various companies and their associated data. At the bottom, there is a footer with copyright information and a login time.

| Company               | SDR             | Industry                     | Status | Website   | Parts & Product url   | Created by  | Updated by | Created Date |
|-----------------------|-----------------|------------------------------|--------|---|---|-------------|------------|--------------|
| etl                   | Harshita KM     | Energy                       | Review | <a href="https://etl.com.in">https://etl.com.in</a>             |   | CRM         |            | 03/21/2025   |
| tata                  | Harshita KM     | Automotive, Consumer Pro...  | Review | <a href="https://amazon.com.in">https://amazon.com.in</a>       |   | CRM         | CRM        | 03/18/2025   |
| Cisco                 | Ummadi Sravani  |                              | Review | <a href="https://www.rapidapi...">https://www.rapidapi...</a>   |   | CRM         | CRM        | 03/17/2025   |
| PVC Technology        | Ummadi Sravani  | Medical                      | Review | test  |   | CRM         | CRM        | 03/10/2025   |
| Rapid API             | Shalmoli Chavan | Other (Specify in notes)     | Review | <a href="https://www.rapidapi...">https://www.rapidapi...</a>   |   | CRM         | CRM        | 03/10/2025   |
| Xanadu                | Niya Jain       | Aerospace and Defense, Co... | Review | <a href="https://www.xanadu.ai">https://www.xanadu.ai</a>       | <a href="https://www.xanadu...">https://www.xanadu...</a>       | Niya Jain   | CRM        | 02/25/2025   |
| The Dimar Canada      | Harshita KM     | Oil and Gas                  | Review | <a href="https://www.dimarca...">https://www.dimarca...</a>     | <a href="https://www.dimarca...">https://www.dimarca...</a>     | Harshita KM |            | 02/25/2025   |
| Burton Mill Solutions | Harshita KM     | Consumer Products            | Review | <a href="https://burtonmill.co...">https://burtonmill.co...</a> | <a href="https://burtonmill.co...">https://burtonmill.co...</a> | Harshita KM |            | 02/25/2025   |
| SuperCut Band Saw     | Harshita KM     | Consumer Products            | Review | <a href="https://supercutband...">https://supercutband...</a>   | <a href="https://supercutband...">https://supercutband...</a>   | Harshita KM |            | 02/25/2025   |
| Specialty Saw         | Harshita KM     | Consumer Products            | Review | <a href="https://www.specialt...">https://www.specialt...</a>   | <a href="https://www.specialt...">https://www.specialt...</a>   | Harshita KM |            | 02/25/2025   |

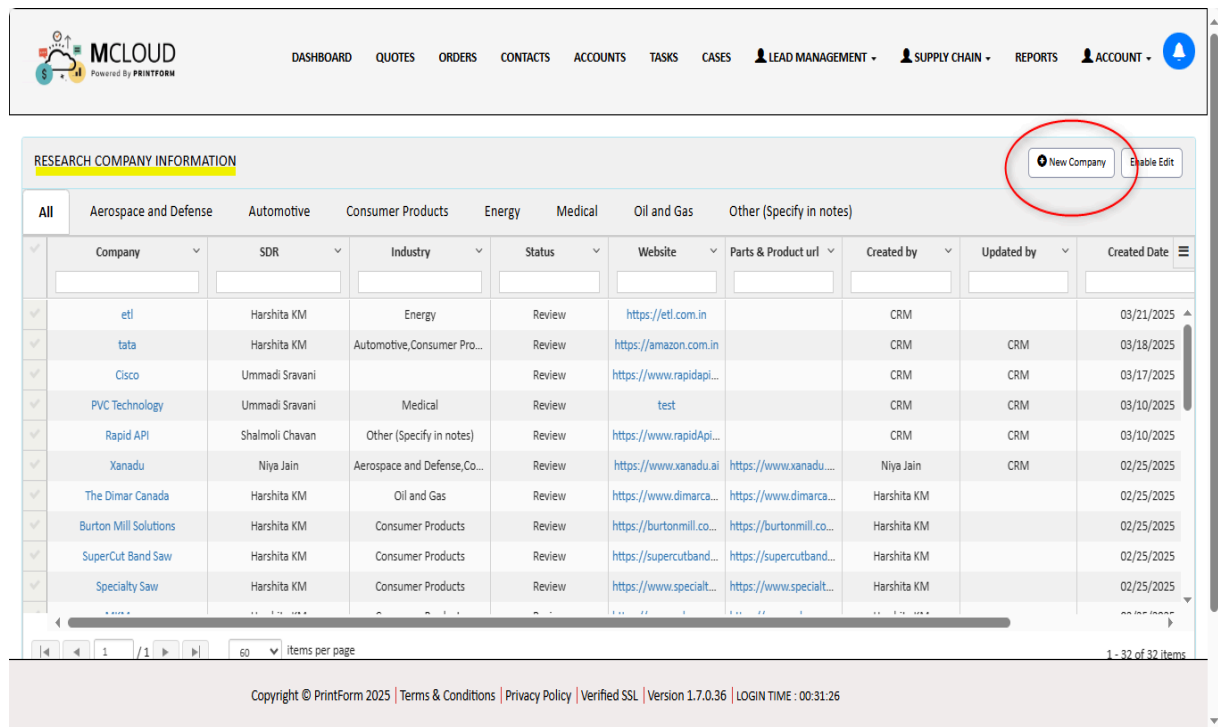
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testpaasport.printform.com/paasport/main/crm/research

## 3. Creating a New Research Company

### 3.1 Filling the Research Form

- 1. Click New Company in the Research subtab.



**RESEARCH COMPANY INFORMATION**

[New Company](#) [Enable Edit](#)

| All                   | Aerospace and Defense | Automotive                   | Consumer Products | Energy  | Medical   | Oil and Gas | Other (Specify in notes) |              |  |  |
|-----------------------|-----------------------|------------------------------|-------------------|---|---|-------------|--------------------------|--------------|--|--|
| Company               | SDR                   | Industry                     | Status            | Website   | Parts & Product url   | Created by  | Updated by               | Created Date |  |  |
| etl                   | Harshita KM           | Energy                       | Review            | <a href="https://etl.com.in">https://etl.com.in</a>             |   | CRM         |                          | 03/21/2025   |  |  |
| tata                  | Harshita KM           | Automotive, Consumer Pro...  | Review            | <a href="https://amazon.com.in">https://amazon.com.in</a>       |   | CRM         | CRM                      | 03/18/2025   |  |  |
| Cisco                 | Ummadi Sravani        |                              | Review            | <a href="https://www.rapidapi...">https://www.rapidapi...</a>   |   | CRM         | CRM                      | 03/17/2025   |  |  |
| PVC Technology        | Ummadi Sravani        | Medical                      | Review            | test  |   | CRM         | CRM                      | 03/10/2025   |  |  |
| Rapid API             | Shalmoli Chavan       | Other (Specify in notes)     | Review            | <a href="https://www.rapidapi...">https://www.rapidapi...</a>   |   | CRM         | CRM                      | 03/10/2025   |  |  |
| Xanadu                | Niya Jain             | Aerospace and Defense, Co... | Review            | <a href="https://www.xanadu.ai">https://www.xanadu.ai</a>       | <a href="https://www.xanadu...">https://www.xanadu...</a>       | Niya Jain   | CRM                      | 02/25/2025   |  |  |
| The Dimar Canada      | Harshita KM           | Oil and Gas                  | Review            | <a href="https://www.dimarca...">https://www.dimarca...</a>     | <a href="https://www.dimarca...">https://www.dimarca...</a>     | Harshita KM |                          | 02/25/2025   |  |  |
| Burton Mill Solutions | Harshita KM           | Consumer Products            | Review            | <a href="https://burtonmill.co...">https://burtonmill.co...</a> | <a href="https://burtonmill.co...">https://burtonmill.co...</a> | Harshita KM |                          | 02/25/2025   |  |  |
| SuperCut Band Saw     | Harshita KM           | Consumer Products            | Review            | <a href="https://supercutband...">https://supercutband...</a>   | <a href="https://supercutband...">https://supercutband...</a>   | Harshita KM |                          | 02/25/2025   |  |  |
| Specialty Saw         | Harshita KM           | Consumer Products            | Review            | <a href="https://www.specialt...">https://www.specialt...</a>   | <a href="https://www.specialt...">https://www.specialt...</a>   | Harshita KM |                          | 02/25/2025   |  |  |

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- 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

## 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).

Research Form

SDR\* :

Company\* :

Website\* :

https://www.com.in

Parts & Products URL:

Notes:

Industry :

☐ Aerospace and Defense

☐ Automotive

☐ Consumer Products

☐ Energy

☐ Medical

☐ Oil and Gas

☐ Other (Specify in notes)

Status :

Review

Close

Submit

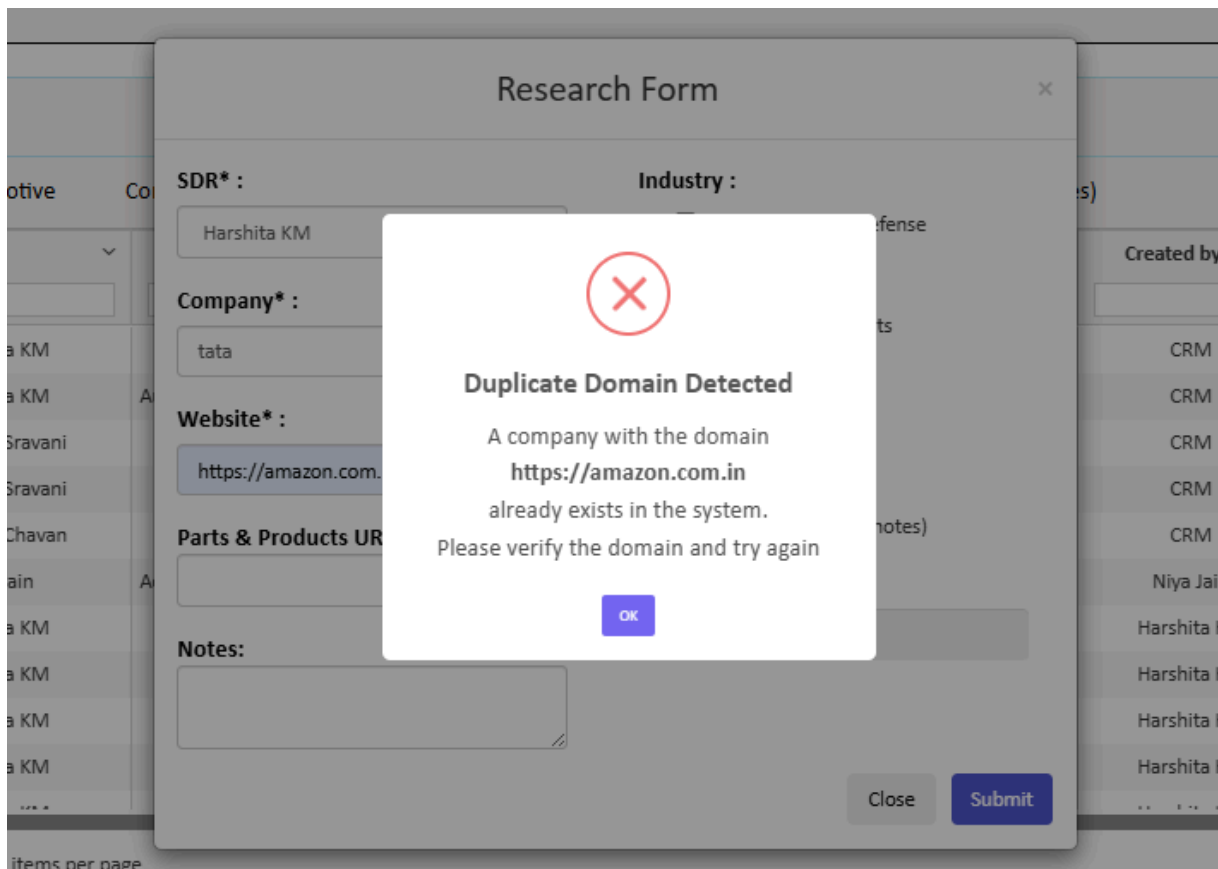
is per page

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

### 3.2 Existing company

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



The image shows a 'Research Form' interface with a modal alert. The form fields include:

- SDR\* :** Harshita KM
- Industry :** (empty)
- Company\* :** tata
- Website\* :** https://amazon.com.in
- Parts & Products UR** (empty)
- Notes:** (empty text area)

The modal alert has a red 'X' icon and the following text:

**Duplicate Domain Detected**  
A company with the domain  
**https://amazon.com.in**  
already exists in the system.  
Please verify the domain and try again

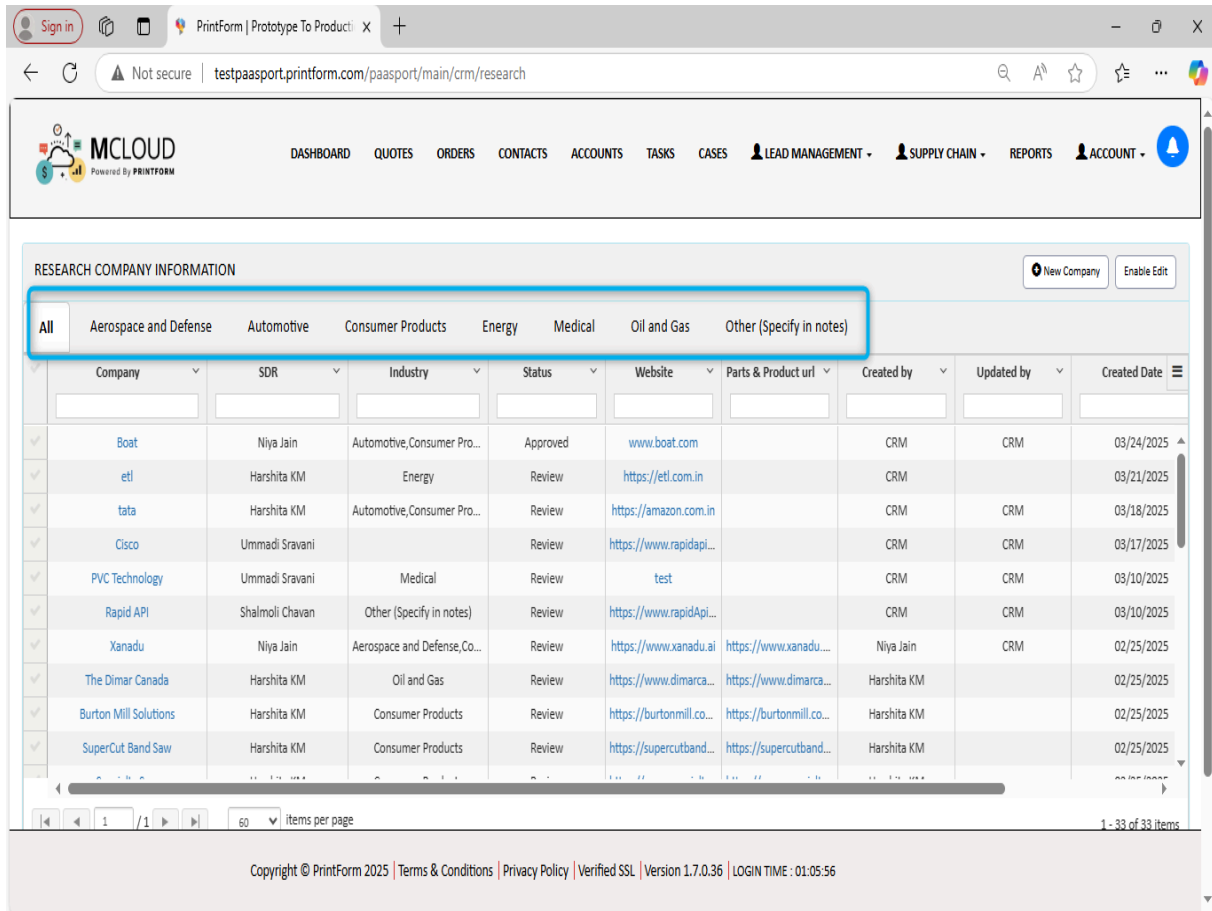
The modal has an 'OK' button. The form has 'Close' and 'Submit' buttons at the bottom right.



## 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.



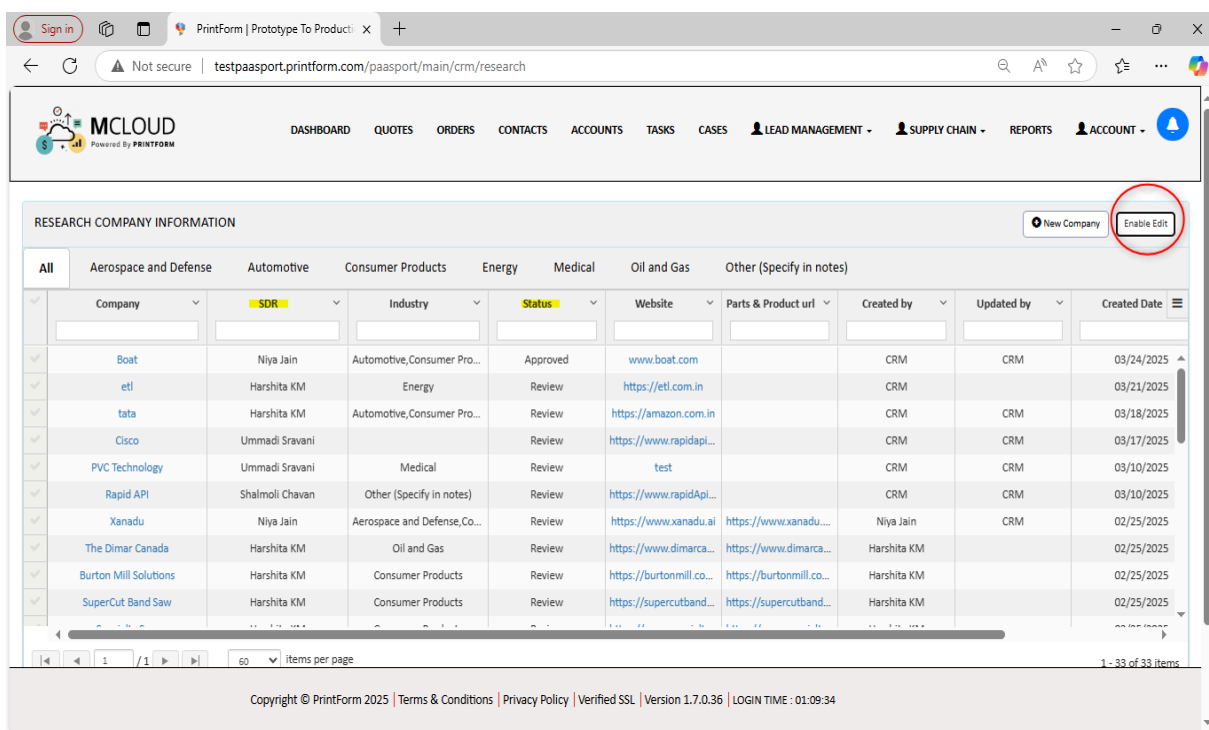
The screenshot displays the PRINTFORM MCloud interface. At the top, there's a navigation bar with links like DASHBOARD, QUOTES, ORDERS, CONTACTS, ACCOUNTS, TASKS, CASES, LEAD MANAGEMENT, SUPPLY CHAIN, REPORTS, and ACCOUNT. Below this, the 'RESEARCH COMPANY INFORMATION' section is visible. It features a filter bar with tabs for 'All', 'Aerospace and Defense', 'Automotive', 'Consumer Products', 'Energy', 'Medical', 'Oil and Gas', and 'Other (Specify in notes)'. The 'All' tab is currently selected. Below the filter bar is a table with columns: Company, SDR, Industry, Status, Website, Parts & Product url, Created by, Updated by, and Created Date. The table lists several companies, including Boat, etl, tata, Cisco, PVC Technology, Rapid API, Xanadu, The Dimar Canada, Burton Mill Solutions, and SuperCut Band Saw. The bottom of the interface shows a footer with copyright information and login details.

| Company               | SDR             | Industry                     | Status   | Website                  | Parts & Product url      | Created by  | Updated by | Created Date |
|-----------------------|-----------------|------------------------------|----------|--------------------------|--------------------------|-------------|------------|--------------|
| Boat                  | Niya Jain       | Automotive, Consumer Pro...  | Approved | www.boat.com             |                          | CRM         | CRM        | 03/24/2025   |
| etl                   | Harshita KM     | Energy                       | Review   | https://etl.com.in       |                          | CRM         |            | 03/21/2025   |
| tata                  | Harshita KM     | Automotive, Consumer Pro...  | Review   | https://amazon.com.in    |                          | CRM         | CRM        | 03/18/2025   |
| Cisco                 | Ummadi Sravani  |                              | Review   | https://www.rapidapi...  |                          | CRM         | CRM        | 03/17/2025   |
| PVC Technology        | Ummadi Sravani  | Medical                      | Review   | test                     |                          | CRM         | CRM        | 03/10/2025   |
| Rapid API             | Shalmoli Chavan | Other (Specify in notes)     | Review   | https://www.rapidApi...  |                          | CRM         | CRM        | 03/10/2025   |
| Xanadu                | Niya Jain       | Aerospace and Defense, Co... | Review   | https://www.xanadu.ai    | https://www.xanadu...    | Niya Jain   | CRM        | 02/25/2025   |
| The Dimar Canada      | Harshita KM     | Oil and Gas                  | Review   | https://www.dimarca...   | https://www.dimarca...   | Harshita KM |            | 02/25/2025   |
| Burton Mill Solutions | Harshita KM     | Consumer Products            | Review   | https://burtonmill.co... | https://burtonmill.co... | Harshita KM |            | 02/25/2025   |
| SuperCut Band Saw     | Harshita KM     | Consumer Products            | Review   | https://supercutband...  | https://supercutband...  | Harshita KM |            | 02/25/2025   |

## 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 .



RESEARCH COMPANY INFORMATION

New Company Enable Edit

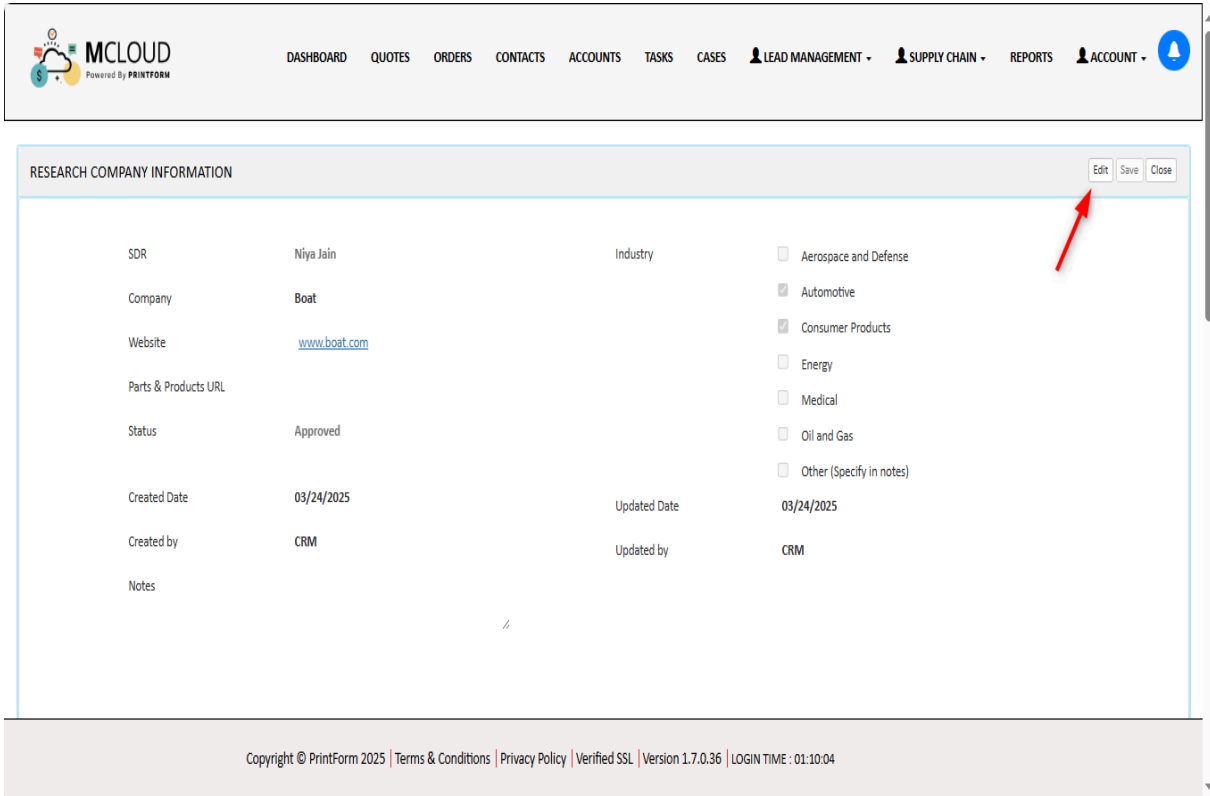
| All                   | Aerospace and Defense | Automotive                  | Consumer Products | Energy                   | Medical                  | Oil and Gas | Other (Specify in notes) |              |  |  |
|-----------------------|-----------------------|-----------------------------|-------------------|--------------------------|--------------------------|-------------|--------------------------|--------------|--|--|
| Company               | SDR                   | Industry                    | Status            | Website                  | Parts & Product url      | Created by  | Updated by               | Created Date |  |  |
| Boat                  | Niya Jain             | Automotive,Consumer Pro...  | Approved          | www.boat.com             |                          | CRM         | CRM                      | 03/24/2025   |  |  |
| etl                   | Harshita KM           | Energy                      | Review            | https://etl.com.in       |                          | CRM         |                          | 03/21/2025   |  |  |
| tata                  | Harshita KM           | Automotive,Consumer Pro...  | Review            | https://amazon.com.in    |                          | CRM         | CRM                      | 03/18/2025   |  |  |
| Cisco                 | Ummadi Sravani        |                             | Review            | https://www.rapidapi...  |                          | CRM         | CRM                      | 03/17/2025   |  |  |
| PVC Technology        | Ummadi Sravani        | Medical                     | Review            | test                     |                          | CRM         | CRM                      | 03/10/2025   |  |  |
| Rapid API             | Shalmoli Chavan       | Other (Specify in notes)    | Review            | https://www.rapidApi...  |                          | CRM         | CRM                      | 03/10/2025   |  |  |
| Xanadu                | Niya Jain             | Aerospace and Defense,Co... | Review            | https://www.xanadu.ai    | https://www.xanadu...    | Niya Jain   | CRM                      | 02/25/2025   |  |  |
| The Dimar Canada      | Harshita KM           | Oil and Gas                 | Review            | https://www.dimarca...   | https://www.dimarca...   | Harshita KM |                          | 02/25/2025   |  |  |
| Burton Mill Solutions | Harshita KM           | Consumer Products           | Review            | https://burtonmill.co... | https://burtonmill.co... | Harshita KM |                          | 02/25/2025   |  |  |
| SuperCut Band Saw     | Harshita KM           | Consumer Products           | Review            | https://supercutband...  | https://supercutband...  | Harshita KM |                          | 02/25/2025   |  |  |

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## 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.



**RESEARCH COMPANY INFORMATION**

|                      |  |              |   |
|----------------------|--|--------------|---|
| SDR                  | Niya Jain                                      | Industry     | <input type="checkbox"/> Aerospace and Defense        |
| Company              | Boat   |              | <input checked="" type="checkbox"/> Automotive        |
| Website              | <a href="http://www.boat.com">www.boat.com</a> |              | <input checked="" type="checkbox"/> Consumer Products |
| Parts & Products URL |  |              | <input type="checkbox"/> Energy                       |
| Status               | Approved                                       |              | <input type="checkbox"/> Medical                      |
|                      |  |              | <input type="checkbox"/> Oil and Gas                  |
| Created Date         | 03/24/2025                                     | Updated Date | 03/24/2025  |
| Created by           | CRM  | Updated by   | CRM   |
| Notes                |  |              |   |

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