

BLMP Application - Documenation

Zoho Creator Application

Table of Contents

1. [Introduction](#)
2. [Accessing This Application](#)
 1. [Application User](#)
 2. [Customer Portal User](#)
3. [Bids](#)
 1. [Bid Creation](#)
 2. [Bid Pricing](#)
 3. [Bid Approval](#)
 4. [Bid to Project Conversion](#)
4. [Projects](#)
 1. [Project Wizard](#)
 2. [Project Details](#)
 3. [Hotel Details](#)
5. [Warehouse Module](#)
 1. [Warehouse Location](#)
 2. [Receiving](#)
 3. [Picking](#)
 4. [Pulling](#)
 5. [Exceptions](#)
 6. [Floor Wise Shortage](#)
 7. [Room Wise Shortage](#)
 8. [Inventory](#)
6. [Installation](#)
 1. [On-Site Receiving](#)
 2. [Handover Process](#)
 3. [Installation](#)
 4. [Walkthrough](#)
 5. [Damage Management](#)
7. [Settings](#)
 1. [Customers](#)
 2. [Contacts](#)
 3. [Employees](#)
8. [Customer Portal](#)

Introduction

BLMP Application helps to track the project in various of the project from the bidding to installation and walk-through process. This application have various processes like [Receiving](#), [Picking](#), [Pulling](#), [On-Site Receiving](#), [Installing](#) and [Walkthrough](#) process based on Project you create with the application to handle furnitures which are needed to a room in a hotel. This application also include reports like Floor Wise Shortage, Room Wise Shortage and Profitability Report based on data we have generated in a project.

This documentation explains various process developed in this application and walk-thought the each stages of process from the bid creation to completing the walkthrough process.

Accessing This Application

BLMP Application can be accessed by users in two different modes, either as application user or customer portal user. Customer Portal mode will have only access to specific module of the application with read-only access. Customer or Agents are given access to the application via customer portal to check on the progress of project in which they are involved. Regular employee like Project Manager, Project Coordinators and Warehouse Staffs will have access to application as Application User.

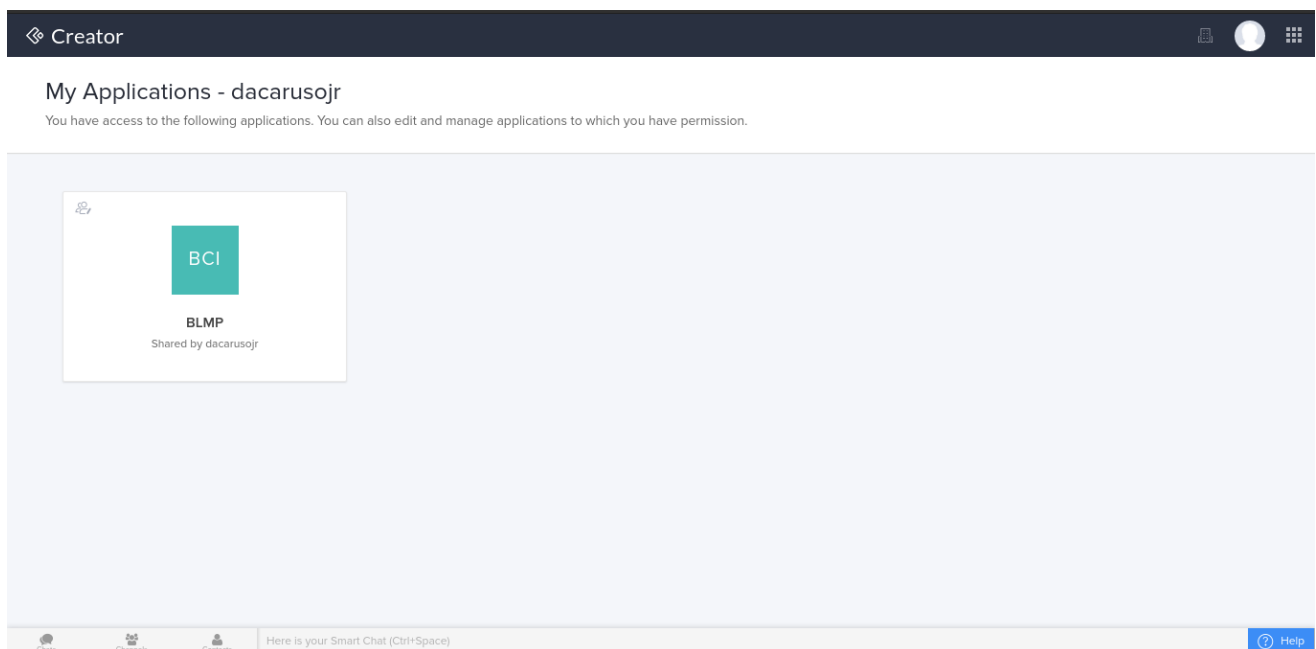


Image 1: Zoho Creator Application Dashboard

Application User

Application User can gain access to the application when application admin or project manager add them as user in the BLMP application. Once a new user is added to the application a email invite will be sent to given user's email address.

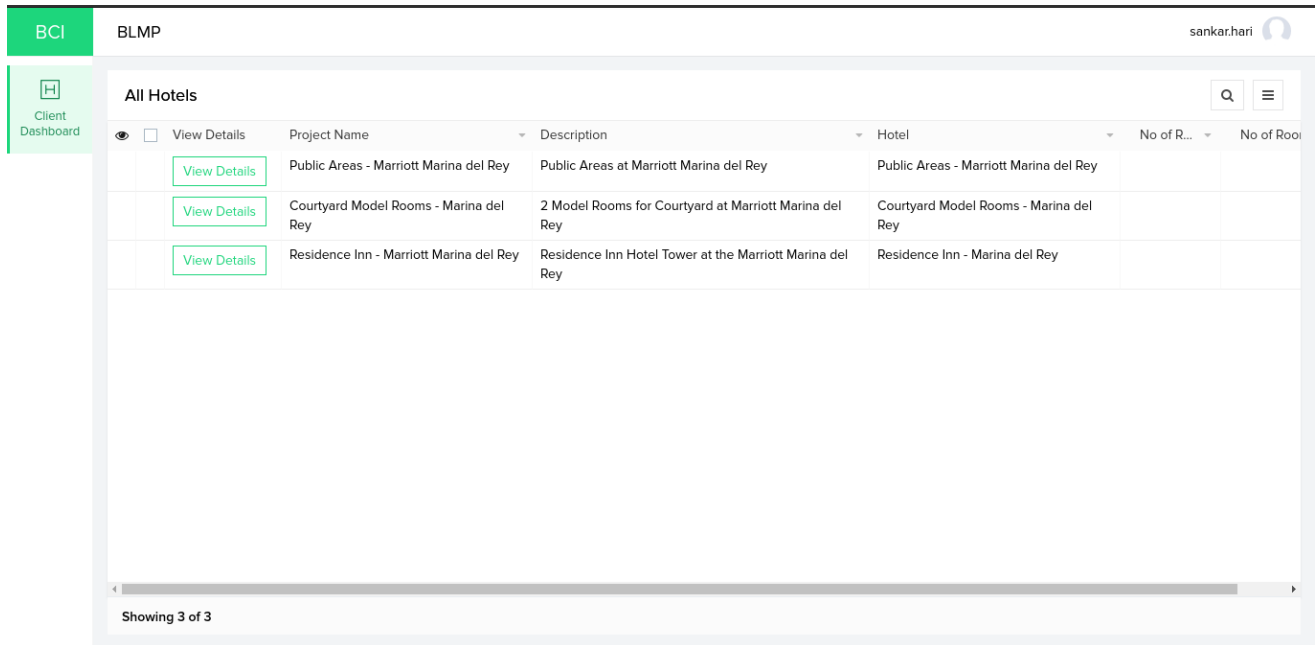
To access BLMP application from Zoho Creator Dashboard go to [Zoho Creator login page](#) and login into Zoho Creator account your user name password. For more details refer this [Zoho Creator documentation](#).

According to BLMP application user can also be able added as user by adding a employee into the application. This process is explained in detail under [Settings > Employees](#) section.

Customer Portal User

Customers can given access to application via Zoho Creator Customer Portal. Customer can login to the application from [Customer Portal Login Page](#). Once logged in they will be having access to projects in which they have added as contact as shown in *Image 2*. Granting access to customer portal to customer portal will be explained in details in [System Setting → Contacts](#).

Customer Portal URL: <https://bciworldwide.zohocreatorportal.com/>



| | Project Name | Description | Hotel | No of R... | No of Rooms |
|------------------------------|---|--|--|------------|-------------|
| View Details | Public Areas - Marriott Marina del Rey | Public Areas at Marriott Marina del Rey | Public Areas - Marriott Marina del Rey | | |
| View Details | Courtyard Model Rooms - Marina del Rey | 2 Model Rooms for Courtyard at Marriott Marina del Rey | Courtyard Model Rooms - Marina del Rey | | |
| View Details | Residence Inn - Marriott Marina del Rey | Residence Inn Hotel Tower at the Marriott Marina del Rey | Residence Inn - Marina del Rey | | |

Image 2: Zoho Creator Customer Portal project list

Note: If you added a user to customer portal with email id domain same as app admin Zoho Creator will allow this email as customer portal user. This email can only be added as application user instead.

Example:

App Admin Email: admin@bciworldwide.com

Lets assume we are trying to added user3@bciworldwide.com or staff@bciworldwide.com as user in customer portal. It is not possible, the customer portal email should be anything other than **@bciworldwide.com** in place of domain name like user2@holidayInn.com or user2@gmail.com or customer@xyzhotel.com can be added to customer portal as user.

Bids

Bids are feature in BLMP application to maintain details of the Bids BCI is participating. This feature allows to store various details like basic details like Project Name, Customer, Contact, Lead Source and files related receptive bid as shown in *Image 3*. Bid also includes feature adding the project pricing along with a pricing approval process as shown in *Image 4*.

BCI BLMP Developer

All Projects / LMA#159 - Le Meridien Arcadia / Warehouse Receiving

Bid Info Bid

| | |
|--------------|---------------------|
| Project Name | Le Meridien Arcadia |
| Customer | HPG International |
| Contact | Sharon Arduini |
| Lead Source | Procurement |
| Close Date | 07-Aug-2020 |
| Stage | Pricing |
| Description | |

| File Type | File Description | File |
|-----------|------------------|--|
| Item List | | 1602606270430_Item_List_for_BLMF_Upload_-_CLEAN.xlsx |

Upload File

Image 3: Bid Info page

BCI BLMP Developer

All Projects / - May 20 test / Warehouse Receiving

Bid Info Bid

Project Pricing Status: Approved

| Price Type | Sub Type | Buy Amount | Sell Amount |
|----------------------------------|--------------|-------------|-------------|
| Installation FF&E - Hotel Towers | Installation | 12,000.00 | 15,000.00 |
| Installation OS&E - Hotel Towers | Installation | 12,000.00 | 15,000.00 |
| | Total | \$24,000.00 | \$30,000.00 |

Review Comments

21-Sep-2020 13:36:32 Add Pricing before sending for approval

Image 4: Approved Project Pricing under Bid details page.

Bid Creation

We can able to create a Bid in the application by providing some basic regarding the bid as shown in Image 3. We can start the Bid creation process from Bids → Pricing → Click on Plus Button as shown in below Image 5 . Once the button is clicked it will open a form to collect information regarding the bid as shown in Image 6, Once details are filed in and click on Submit a bid will be created in the application.

Note:

Before creating a bid in application customers and contacts needed to be created in customers module. If the customer already exist, the existing customer can be reused. We have explained the customer and contact creation in [Customers Section](#).

BCI BLMP Developer

All Projects / - May 20 test / Warehouse Receiving

Bid Info Bid

Click Here to Create Bid

Pricing

View Details

| View Details | Project Name | Stage | Contacts | Lead Source | Bid Due Date | Description |
|--------------|---------------------|---------|----------------|-------------|--------------|-------------|
| View Details | Le Meridien Arcadia | Pricing | Sharon Arduini | Procurement | 07-Aug-2020 | |

Image 5: Bids list page.

The screenshot shows the 'Project' form in the BLMP application. The form is titled 'Project' and has a close button (X) in the top right corner. The form contains the following fields:

- Project Code *
- Project Name *
- Description
- Stage *
- Customers *
- Contacts
- Lead Source *
- Bid Due Date *

Below the form fields is a section titled 'File Attachments' with a table structure:

| * File Type | File Description | * File |
|-------------|------------------|--------|
|-------------|------------------|--------|

Image 6: Bid Form.

Bid Pricing

Settings

Customers

Customers module allow to maintain the details of the customer like Name, Contact Person, Phone, Address, etc. We have given the contacts as sub-form as shown in the *Image 7* since there may be more than one contact person. Contacts can also be able to added or removed from Customer form itself or contact can later be associated to a customer, We have explained this process in [Contacts](#) section. You can create a new customer from *System Settings* → *Customers* → *Click on Plus Button*. A customer form will be open to collect the customer information.

The screenshot shows the 'Customer' form in the BLMP application. The form is titled 'Customer' and has a close button (X) in the top right corner. The form contains the following fields:

- Customer *
- Phone
- Address
- Region
- Description

Below the form fields is a section titled 'Contacts' with a table structure:

| * Name | Phone | Address | * Email |
|--------|-------|---------|---------|
|--------|-------|---------|---------|

Image 7: Customer Form

| Customer | Contacts | Address | Phone | Region | Description |
|-----------------------|---------------------|--|--------------|--------|-------------|
| Operation Development | Ops Dev | Sands Macau | +85363001166 | Macau | |
| Operation Development | | Sands Macau | +85363001166 | Macau | |
| PJV Resorts & SPA | Paulo Vilao | Avenida Dr. Mario Soares, AIA Building 28 Floor, Units D&E, Macau, Macau | +85388888888 | Macau | |
| MCA Asia | Paulo Vilao | Rua do General Coronel Mesquita 225, Ed. Fun Key, 7 Floor, Unit D, Macau | +85388888888 | Macau | |
| June 16 Customer A | June 16 Contact A | Address1, Address2, City, State, 6767, Andorra | | | |
| Resorts World | Janet Abbott | 3000 Las Vegas Blvd S, Las Vegas, NV, 89109, United States | +17026766513 | US | |
| | Angela Mastrantuono | | | | |
| | Farrah Sahakian | | | | |
| | Ben Apple | | | | |
| | David Cannon | | | | |

Image 8: Customers List Report.

Contacts

Contacts module is similar to customer module allows to store basic information of person how is going to representative of the customer. Customer module also serves as a place where we can enable or disable access of [Customer Portal](#). We can create contact in application from *System Settings → Contacts → Click on Plus Button*.

Note: Customer should be created first in order to add create or associate a contact to customer. As mentioned in customer section contacts can be created from customer module itself.

Image 9: Contact Creation Form.

If the customer field is selected while creating a contact. The system will automatically associate the created contact with respective customer in Customer module as sub-form line item.

Granting and Revoking access to Customer Portal

As mentioned in the introduction of the contact module, This module can also used to manages access to customer portal. If a contact is not give customer portal access yet you can field an option called *Grant Customer Portal Access* in *System Settings → Contacts* as shown in *Image 10*. Once this button is clicked a email invite will be sent to respective email ID added to the contact. Once customer have accepted the invite they have read-only access to the project to which they have added as contact.

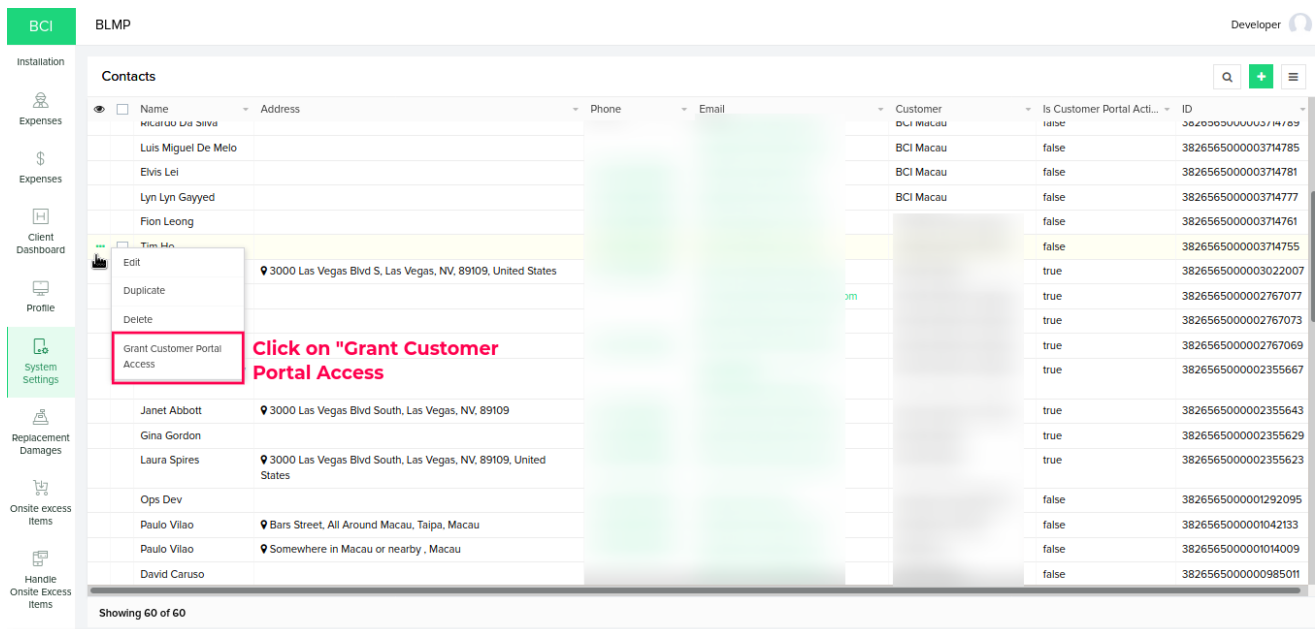


Image 10: Granting customer portal access from Contact module.

If customer is already given access to customer portal *Grant Customer Portal Access* action will not be available any more. Instead you can find a option called *Revoke Customer Portal Access*, This option allow to revoke access given to customer portal for a given customer as shown in *Image 11*. You can also use *Is Customer Portal Active* column to check a contact is having customer portal access or not.

Note:

- If customer didn't get invite mail in inbox ask them to check in spam or trash once.
- Invalid email ID may be another reason why invite was not sent.
- Maximum number of customer portal user may have reached.

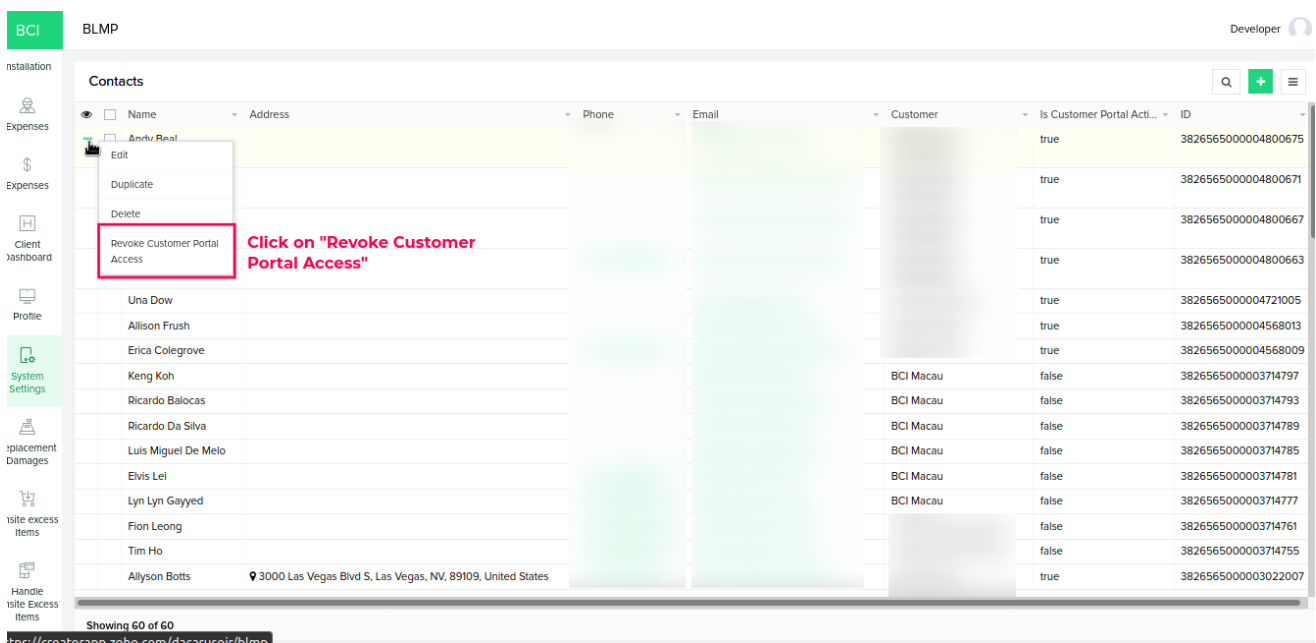


Image 11: Revoking customer portal access from Contact module.

BCI

BLMP

sankar.hari

Client Dashboard

All Projects

Public Areas - Marriott Marina del Rey

Details

Inventory

Warehouse Inventory

DN Receiving

DamageDN Report

DamageOnsite Report

Inventory

Q

| | <input type="checkbox"/> | Furniture | Item Code | Description | Vendor | PO# | Storage Ty... | Project Qu... | Received C |
|--|--------------------------|--|------------|------------------------------|----------------------------------|----------|---------------|---------------|------------|
| | | Art @ PreFunction Console | AA-07 | | Palecek | B2170304 | | 1 | |
| | | Tower Dispenser @ Public Area Restroom | ACCS-1 | | B2B Supply | B2170296 | | 12 | |
| | | Handcart @ Classroom Tables | Mtg Rm - 3 | Meeting Room | Shelby Williams Industries, Inc. | B2170269 | | 1 | |
| | | Handcart @ 60" Round Tables | Mtg Rm - 4 | Meeting Room | Shelby Williams Industries, Inc. | B2170269 | | 1 | |
| | | Classroom Table @ Meeting Rm | Mtg Rm - 2 | Meeting Room | Shelby Williams Industries, Inc. | B2170269 | | 50 | |
| | <input type="checkbox"/> | Buffet Table @ Meeting Rm | Mtg Rm - 5 | Meeting Room | Shelby Williams Industries, Inc. | B2170269 | | 6 | |
| | | 60" Round Table @ Meeting Rm | Mtg Rm - 1 | Meeting Room | Shelby Williams Industries, Inc. | B2170269 | | 17 | |
| | | RESELECT? Ottoman @ Fireplace | IF-618 | Public Area Roof Top BarLnge | TBD | | | 2 | |
| | | ON HOLD Planter @ Pool | IF-805 | Public Area Pool | TBD | | | 8 | |

Showing 136 of 136

Image 12: Customer project detail view

We will discuss regarding the customer portal module in details under [Customer Portal](#) section. For information you can also refer to this [Zoho Creator Documentation](#).

Employees

Employees are application users, These are who is going play various roles in the BLMP Application like Project Manager, Project Coordinator, Warehouse Staff, etc. Based on the roles under which a employee is getting added, the some of modules access will be restricted. For Example, Let us assume we are adding a user under Warehouse Manager Role. He/She will be access to module that are specific to warehouse handling like Overall Inventory, Warehouse Inventory, Warehouses, Picking, etc.

We have used Zoho Creator's roles and permission features to grant or restrict access to various modules of BLMP Application. To know more about the roles and permission please refer this [Zoho Creator Documentation](#)

You can add a new employee to the application from *System Settings* → *Employees* → *Add new Employee* button as shown in the *Image 13*.

| | | | |
|--------------------------|---------------------|---------------------------|---------------------|
| BCI | BLMP | Edit this application | Developer |
| Installation | | | |
| Expenses | | | |
| Expenses | | | |
| Client Dashboard | | | |
| Profile | | | |
| System Settings | | | |
| Employees | | | |
| <input type="checkbox"/> | Employee Name | Email | Role |
| | Ricky Da Silva | rsilva@bcworldwide.com | Supervisor |
| | Test User | christy@bizappln.com | Project Coordinator |
| | Ricardo Balocas | rbalocas@bcworldwide.com | Write |
| | Goh Keng | kgoh@bcworldwide.com | Write |
| | Mark Dela Rosa | mdelarosa@bcworldwide.com | Write |
| | Luis Miguel De Melo | lmiguel@bcworldwide.com | Write |
| | Lyn Lyn Gayyed | lgayyed@bcworldwide.com | Write |
| | Paulo Vilao | pvilao@bcworldwide.com | Write |
| | Elvis Lei | elei@bcworldwide.com | Write |
| <input type="checkbox"/> | Leah Bonnett | lbonnett@bcworldwide.com | Write |
| | Christine Vettese | cvettese@bcworldwide.com | Write |
| | Rohin Damm | rdamm@bcworldwide.com | Project Coordinator |

Image 13: Employee list report.

The screenshot shows the BLMP application interface. On the left is a sidebar with navigation links: BCI, BLMP, Profile, System Settings (highlighted in green), Replacement Damages, and Onsite excess. The main content area is titled 'Employees' and contains a form with the following fields:

- Employee Name ***: Two input fields for 'First Name' and 'Last Name'.
- Email ***: A single input field with an email icon on the right.
- Role ***: A dropdown menu with '-Select-' as the current selection.

At the bottom of the form are two buttons: 'Submit' (highlighted in green) and 'Reset'.

Image 14: Form to add new employee in application

Once employee details are entered and clicked on submit. Application will add this Employee as user in the BLMP application. An email invite will be sent to email ID given in from while adding a new user. If you try to edit a existing employee's email ID access to old email ID will be revoked and Invite will we sent to new email ID.

Note:

- User email address should be unique.
- Please check for invite mail in Spam and Trash mail too.
- Invalid email ID.
- Adding the user may fail when maximum number purchased user license have reached.