

BLMP Application - Documenation

Zoho Creator Application

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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.

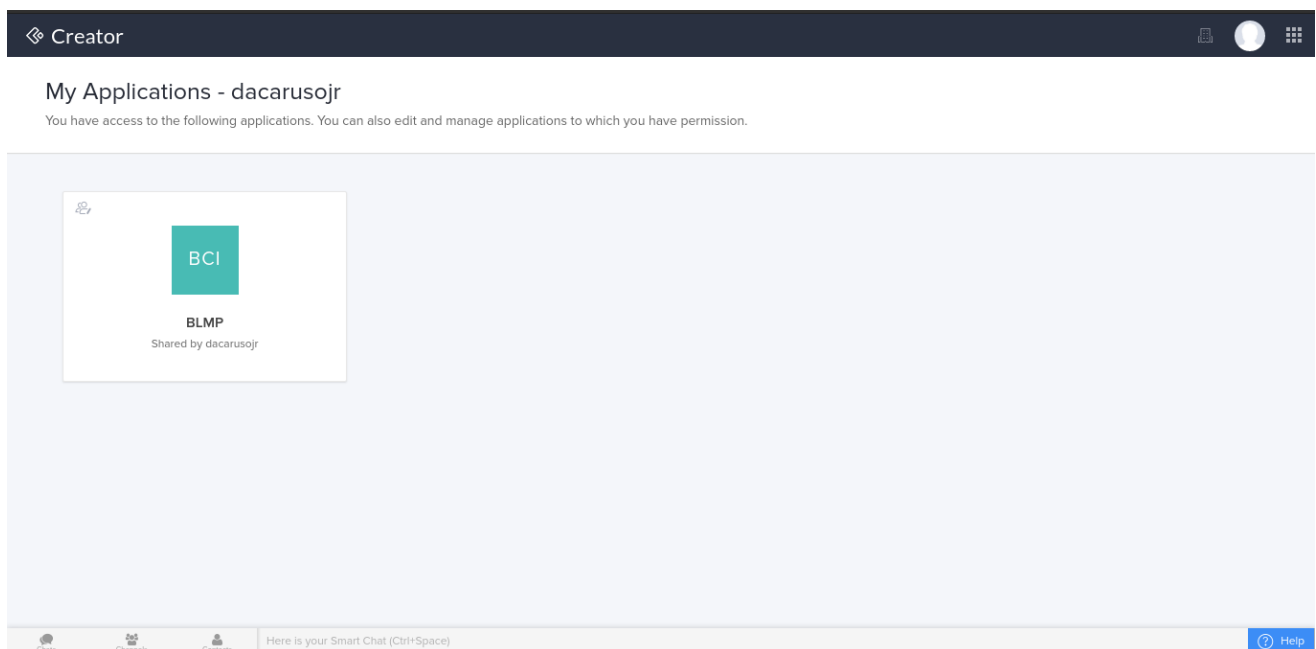


Image 1: Zoho Creator Application Dashboard

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.

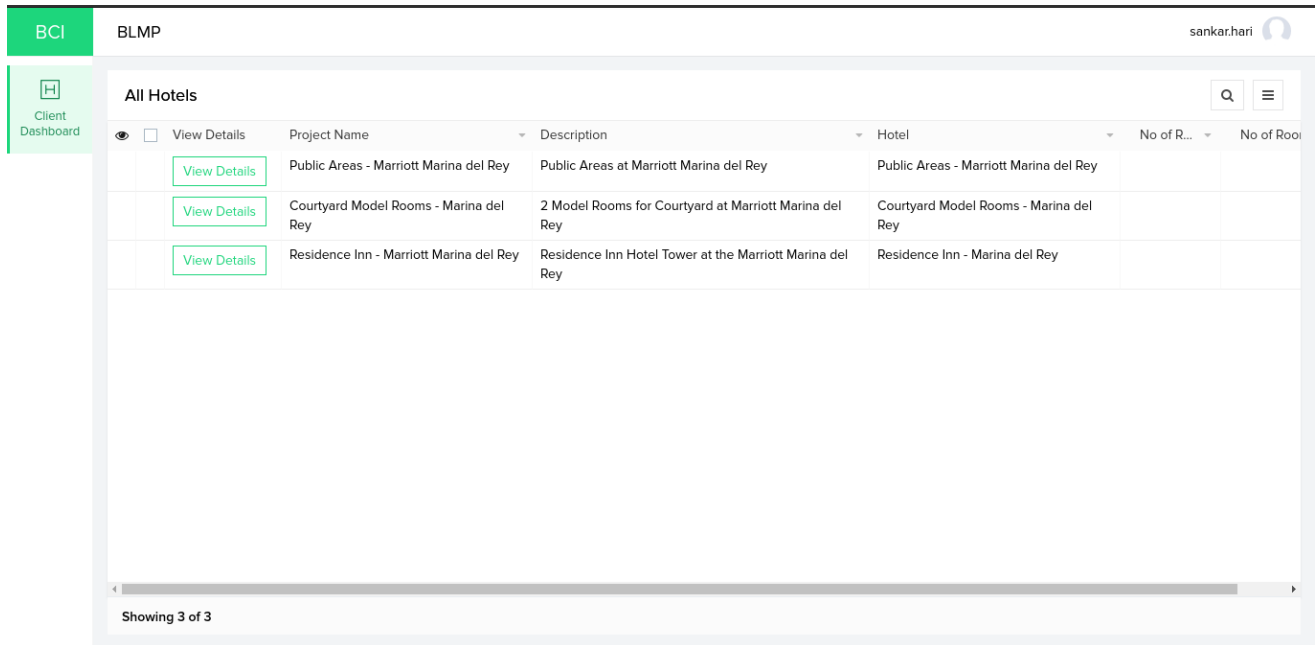
To access BLMP application from Zoho Creator Dashboard go to [Zoho Creator login page](#) and login into Zoho Creator account your user name password. For more details refer this [Zoho Creator documentation](#).

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*.

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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

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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 and redirected to [Bid Pricing](#).

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.

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Pricing

View Details View Details

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

Click Here to Create Bid

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 * (dropdown menu with '-Select-')
- Customers * (dropdown menu with '-Select-')
- Contacts (dropdown menu with '-Select-')
- Lead Source * (dropdown menu with '-Select-')
- Bid Due Date * (date picker with format 'dd-MMM-yyyy')

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

Bid pricing is a feature used in the application capture your bidding amount over a project/tender. We can also add estimate of pricing split-up of various expenses which you may have on various resources and services which are going to be offering to the customer as *Buy Amount* and *Sell Amount*. The page shown in *Image 15* will be shown immediately after a bid is created. You can click on *Add Price Type* button to add a new price type into new or existing bid you have created. Form shown in *Image 16* will be opened to collect the price type, sub type and pricing information. While adding price types to a bid, new price type or sub type can be created from the bid from itself.

The screenshot shows the 'Project Pricing' page in the BLMP application. The page has a breadcrumb trail: *All Projects / DB#169 - Demo Bid / Warehouse Receiving*. The page is titled 'Project Pricing' and has a 'Status: New' button in the top right corner. Below the title is a table with the following columns:

Price Type	Sub Type	Buy Amount	Sell Amount
	Total	\$	\$

Below the table is a button labeled '+ Add File'. There are also buttons for '+ Add Price Type' and 'Send For Approval' in the top right corner of the table area.

Image 15: Bid Pricing Page

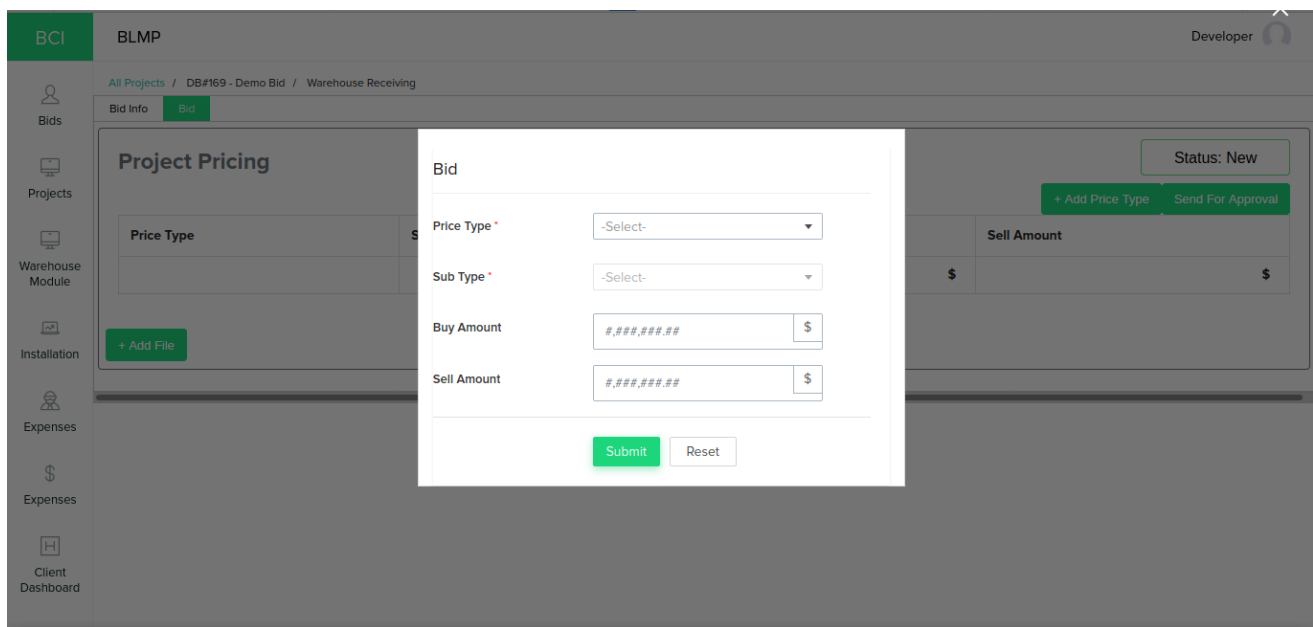


Image 16: Adding Price Type Bid Pricing.

Once the prices types are added to pricing Bid Pricing Page will look like as shown in *Image 17*. We enable to option to delete or edit the price type added to the pricing when needed. We have also implemented an approval process for getting permission from user from higher hierarchy. We have discussed the approval process in details under [Bid Approval](#) section.

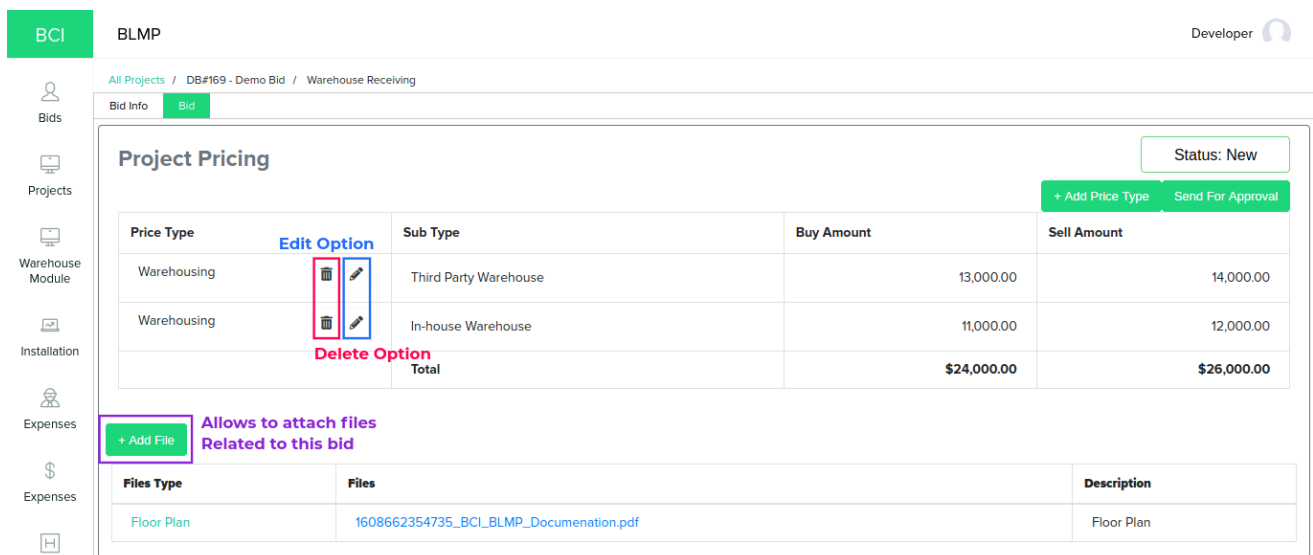


Image 17: Bid pricing page after adding some price type to the bid.

Bid Approval

In bid approval process once bid pricing is completed, The bid can be sent for approval to based on hierarchy. In BLMP Application we have two hierarchy, Bid Creator and Bid Approver. Users under Bid Creator and Bid Approver both have access to create, edit and delete a price type in bid pricing process. But the Bid Approver have privilege to approve or review the bid pricing submitted by Bid Creator as shown in *Image 18*.

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Developer

All Projects / DB#169 - Demo Bid / Warehouse Receiving

Bid Info

Bid

Project Pricing

Status: Submitted

Approve

Review

Price Type	Sub Type	Buy Amount	Sell Amount
Warehousing	Third Party Warehouse	13,000.00	14,000.00
Warehousing	In-house Warehouse	11,000.00	12,000.00
	Total	\$24,000.00	\$26,000.00

+ Add File

Files Type	Files	Description
Floor Plan	1608662354735_BCI_BLMF_Documentation.pdf	Floor Plan

Image 18: Bid Pricing after submitting for approval of Admin Approver

You can notice in the status of *Bid Pricing* is update to *Submitted* from *New*. At this stage users in admin role will not have access to add, modify or delete a price type (i.e., Admin will only have read-only access once submitted for approval). Now users under Admin Approver role will access create, edit or delete access to price types added by Admin user. Apart from this they have privileged to *Approve* a pricing submitted or send it back for *Review* using the *Approve* or *Review* button shown in above *Image 18*.

If *Admin Approver* approves the pricing, the bid approval process will be completed and the bid pricing will be locked no more modification in pricing can be done by both the roles.

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Developer

All Projects / DB#169 - Demo Bid / Warehouse Receiving

Bid Info

Bid

Project Pricing

Status: Approved

Price Type	Sub Type	Buy Amount	Sell Amount
Warehousing	Third Party Warehouse	13,000.00	14,000.00
Warehousing	In-house Warehouse	11,000.00	12,000.00
	Total	\$24,000.00	\$26,000.00

Review Comments

24-Dec-2020 03:18:33	Increase the pricing of In-house Warehouse expense. Upload the estimate document when submitting for approval
----------------------	--

Files Type	Files	Description
Floor Plan	1608662354735_BCI_BLMF_Documentation.pdf	Floor Plan
Proposal	1608752478162_Rooms_Bulk_Import.xlsx	

Image 21: Approved pricing and Status updated to Approved

If approver clicks on *Review* button, a window will prompt for *Review Comments* as shown in *Image 19*. Admin approver can adding review view in he rich text field and click on submit, Then status of the pricing will be updated to *Review* and Review Comment added by the approver will be shown to admin as shown in *Image 20*. At this stage pricing details can be revised or additional files can be attached by Admin and resubmit the pricing for approval again.

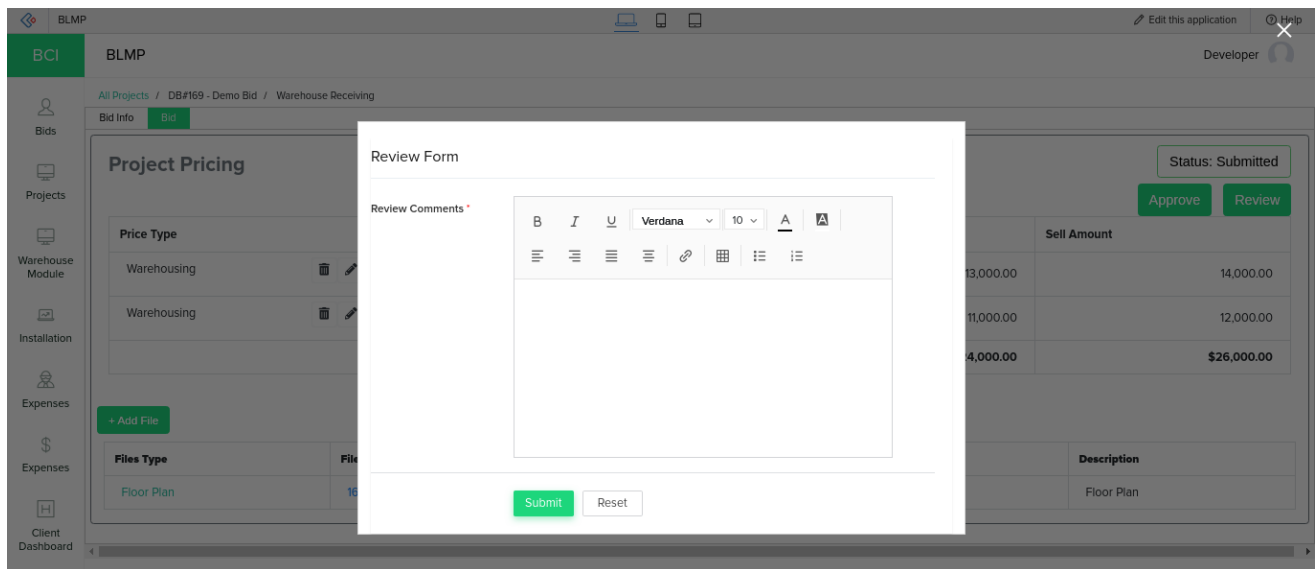


Image 19: Rich-Text field to get review comment from approver

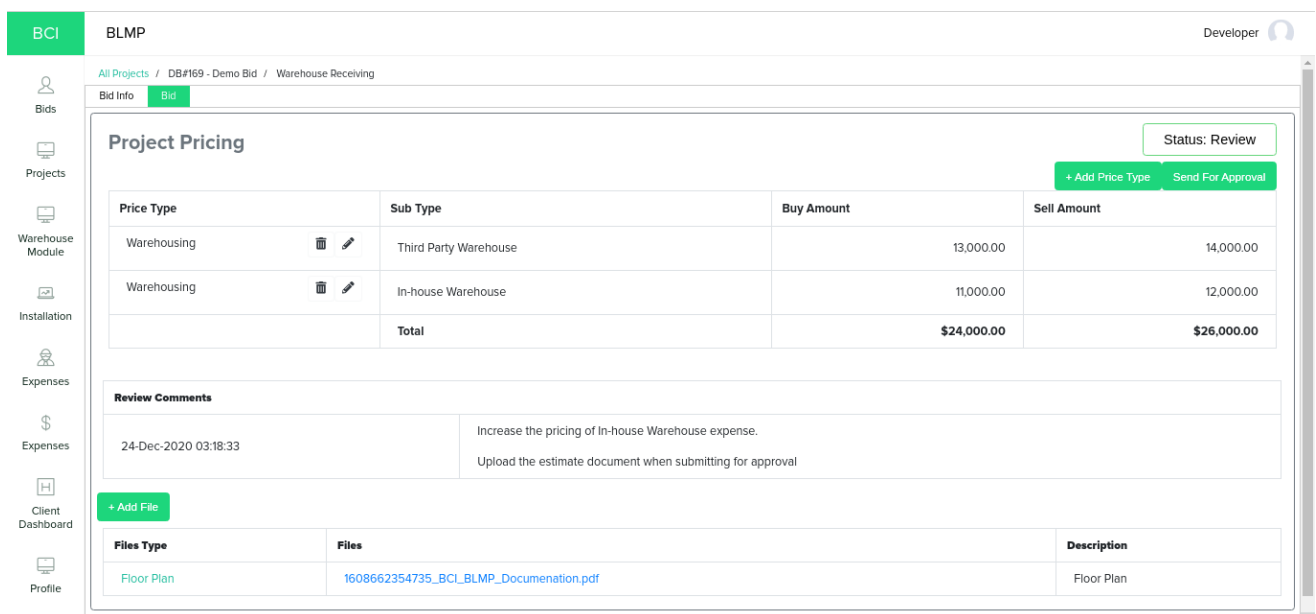


Image 20: Status updated to Review and showing Review Comment added from Admin Approver

Bid to Project Conversion

Once a Bid Pricing is approved and won, Bid created can be converted to project directly. You can go to *Bids* → *Approved* → *Edit*

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.

Customer Form

Customer *

Phone: +853 6612 3456

Address:

Address Line 1

Address Line 2

City / District: State / Province: -Select-

Postal Code: Country: -Select-

Region: -Select-

Description:

Contacts

Name	Phone	Address	Email
First Name Last Name	+853 6612 3456	Address Line 1	

Image 7: Customer Form

Customers List Report

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 Carson				

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.

Contact Form

Name *

First Name Last Name

Customer * -Select-

Phone: +853 6612 3456

Address:

Address Line 1

Address Line 2

City / District: State / Province: -Select-

Postal Code: Country: -Select-

Email *

Customer field is mandatory. Make sure customer is already created to associate a contact to customer

Submit Reset

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.

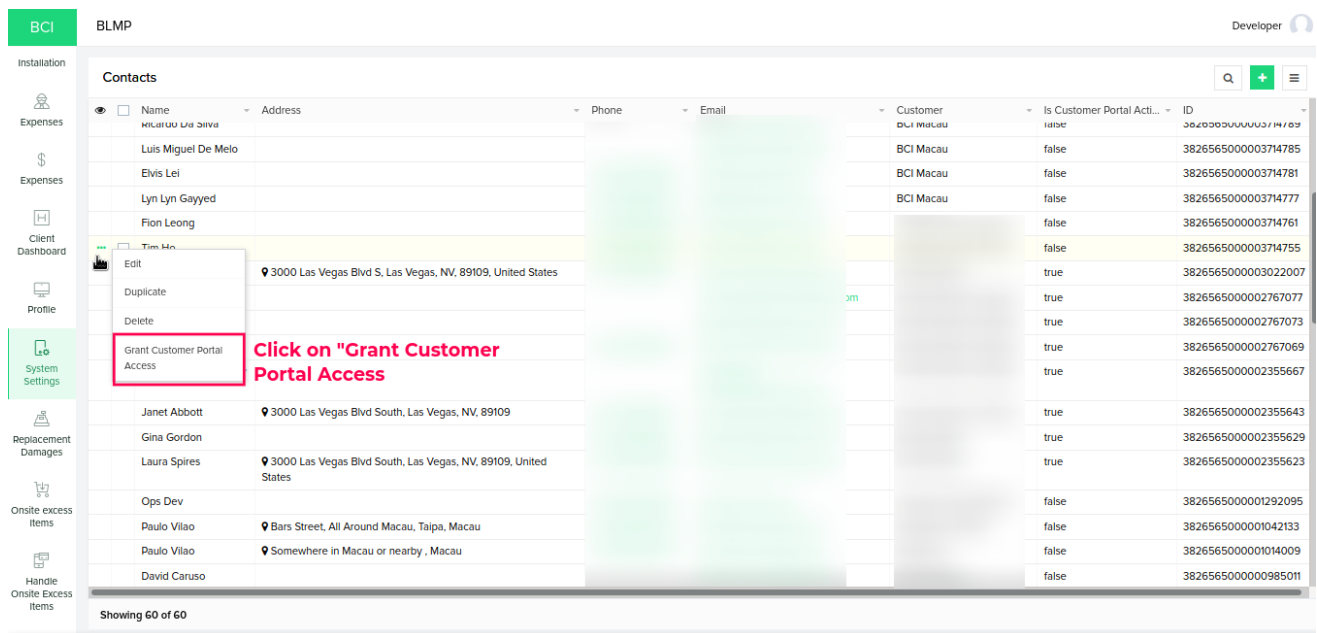


Image 10: Granting customer portal access from Contact module.

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.

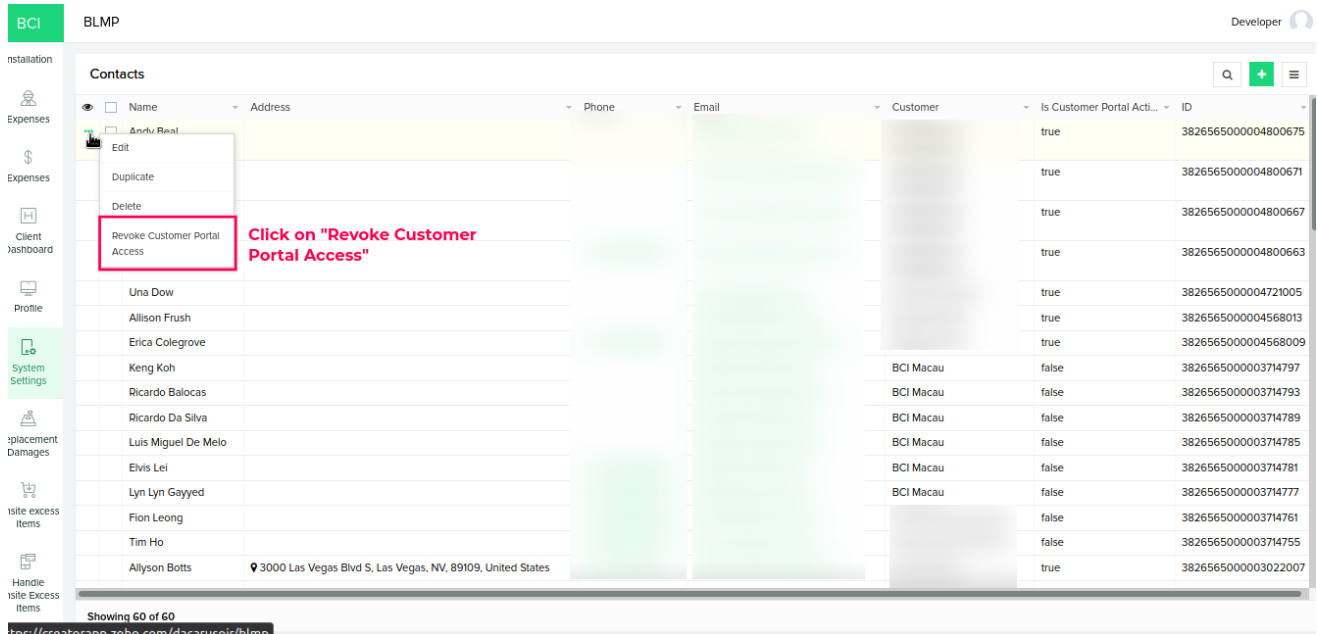


Image 11: Revoking customer portal access from Contact module.

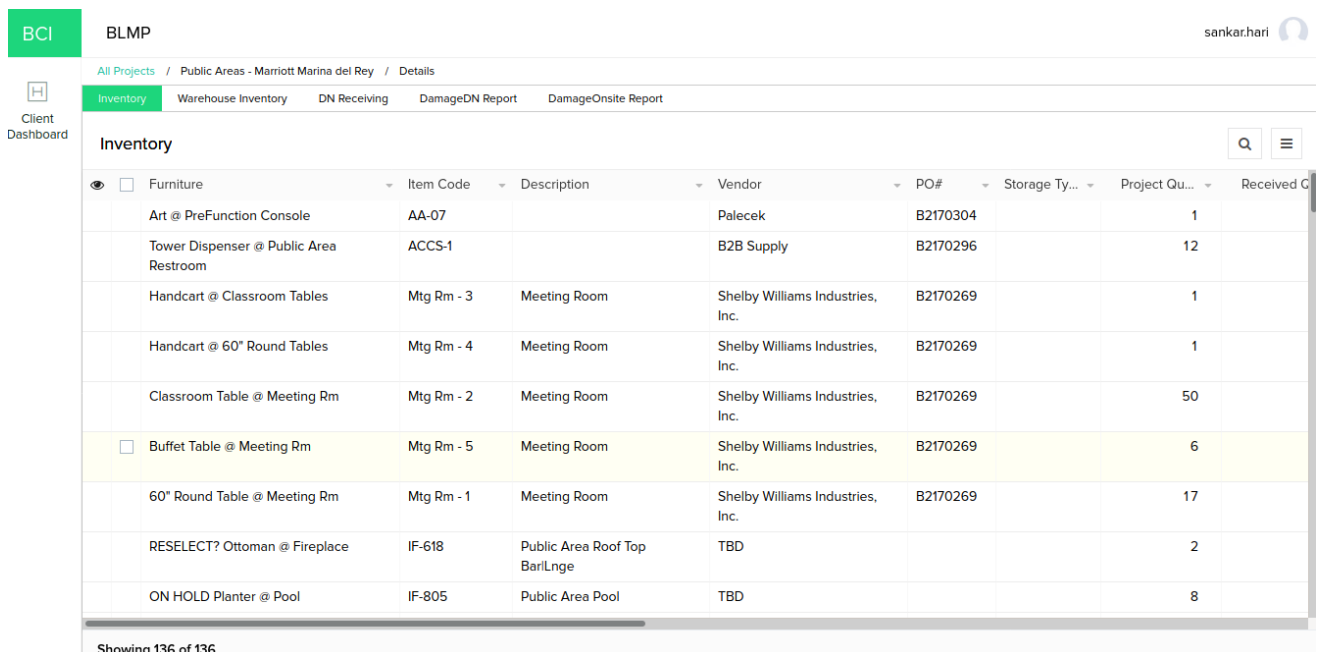


Image 12: Customer project detail view

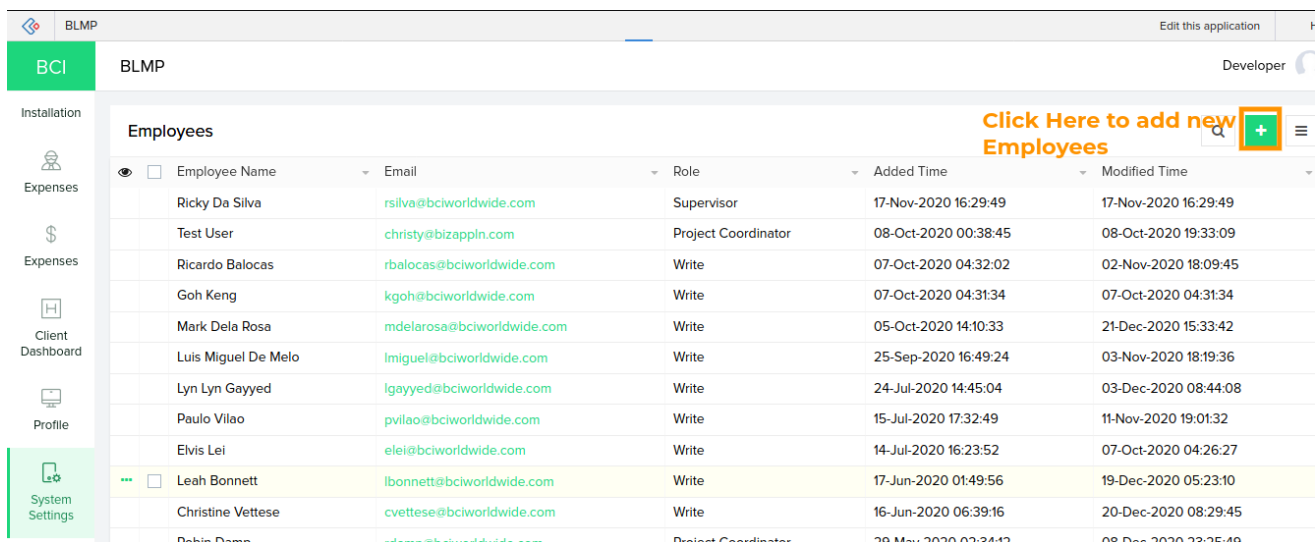
We will discuss regarding the customer portal module in details under [Customer Portal](#) section. For information you can also refer to this [Zoho Creator Documentation](#).

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.

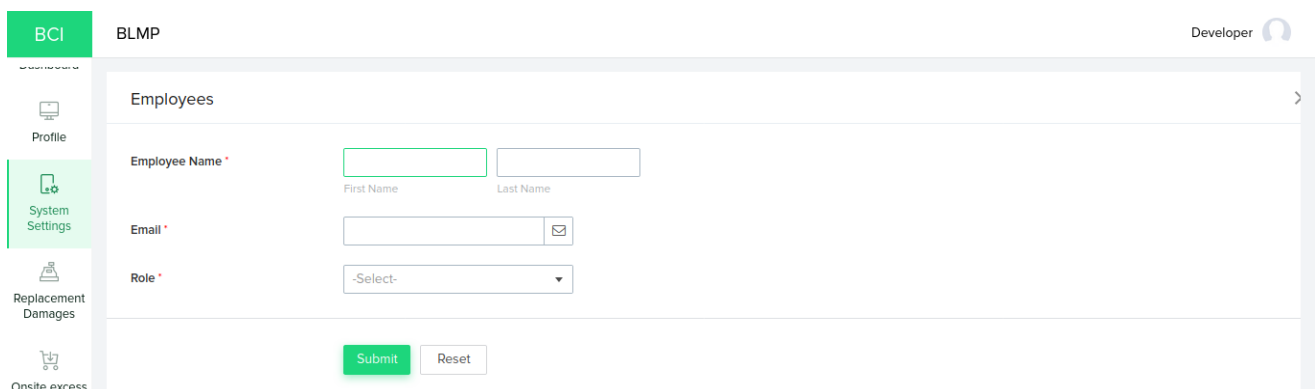
We have used Zoho Creator's roles and permission features to grant or restrict access to various modules of BLMP Application. To know more about the roles and permission please refer this [Zoho Creator Documentation](#)

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



Employee Name	Email	Role	Added Time	Modified Time
Ricky Da Silva	rsilva@bcworldwide.com	Supervisor	17-Nov-2020 16:29:49	17-Nov-2020 16:29:49
Test User	christy@bizappln.com	Project Coordinator	08-Oct-2020 00:38:45	08-Oct-2020 19:33:09
Ricardo Balocas	rbalocas@bcworldwide.com	Write	07-Oct-2020 04:32:02	02-Nov-2020 18:09:45
Goh Keng	kgoh@bcworldwide.com	Write	07-Oct-2020 04:31:34	07-Oct-2020 04:31:34
Mark Dela Rosa	mdelarosa@bcworldwide.com	Write	05-Oct-2020 14:10:33	21-Dec-2020 15:33:42
Luis Miguel De Melo	lmiguel@bcworldwide.com	Write	25-Sep-2020 16:49:24	03-Nov-2020 18:19:36
Lyn Lyn Gayyed	lgayyed@bcworldwide.com	Write	24-Jul-2020 14:45:04	03-Dec-2020 08:44:08
Paulo Vilao	pvilao@bcworldwide.com	Write	15-Jul-2020 17:32:49	11-Nov-2020 19:01:32
Elvis Lei	elei@bcworldwide.com	Write	14-Jul-2020 16:23:52	07-Oct-2020 04:26:27
Leah Bonnett	lbonnett@bcworldwide.com	Write	17-Jun-2020 01:49:56	19-Dec-2020 05:23:10
Christine Vettese	cvettese@bcworldwide.com	Write	16-Jun-2020 06:39:16	20-Dec-2020 08:29:45
Rohin Damm	rdamm@bcworldwide.com	Project Coordinator	29-May-2020 02:34:12	08-Dec-2020 23:25:49

Image 13: Employee list report.



Employee Name *

First NameLast Name

Email *

Role *

-Select-

Submit

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 be 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.