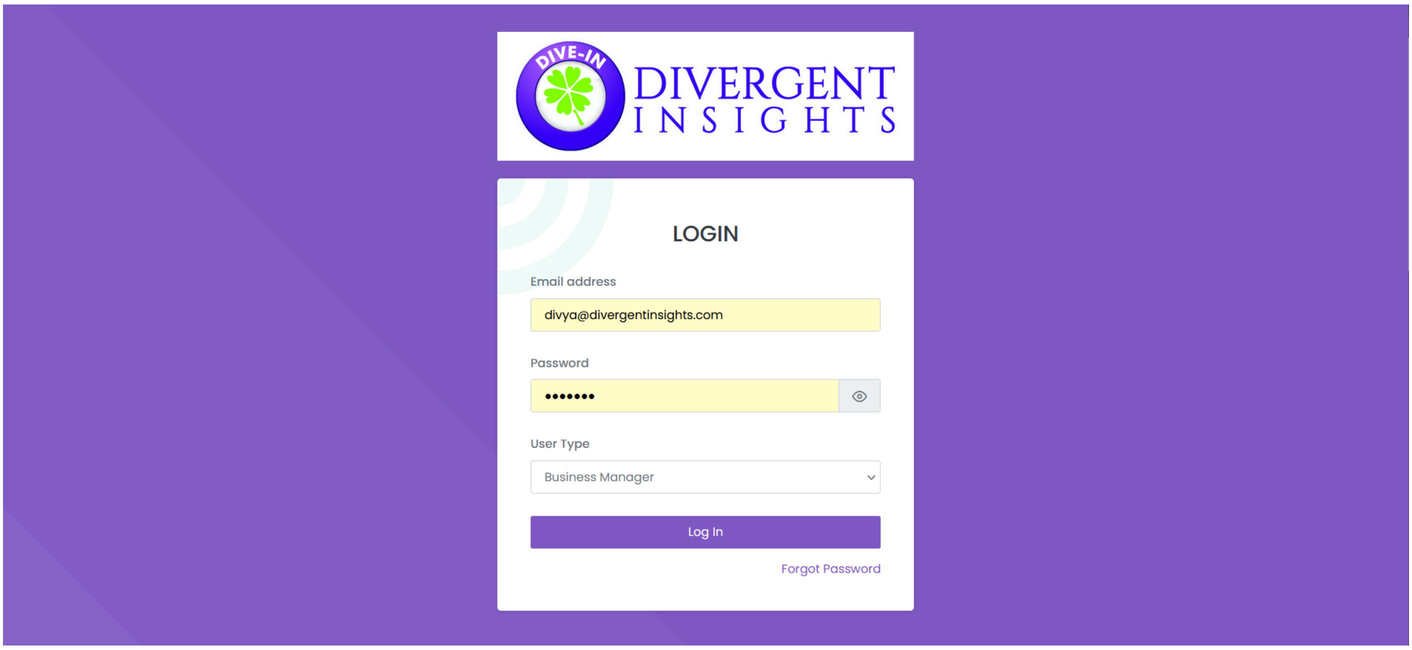
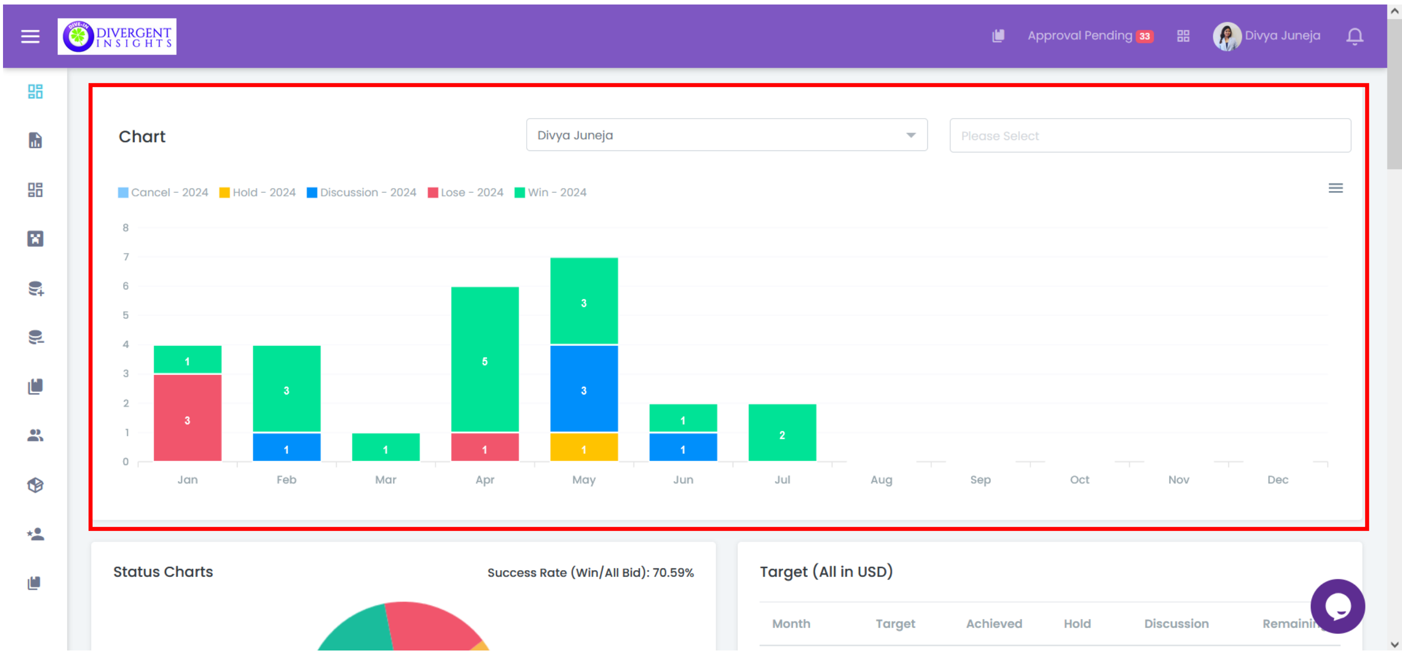
LOGIN PAGE:

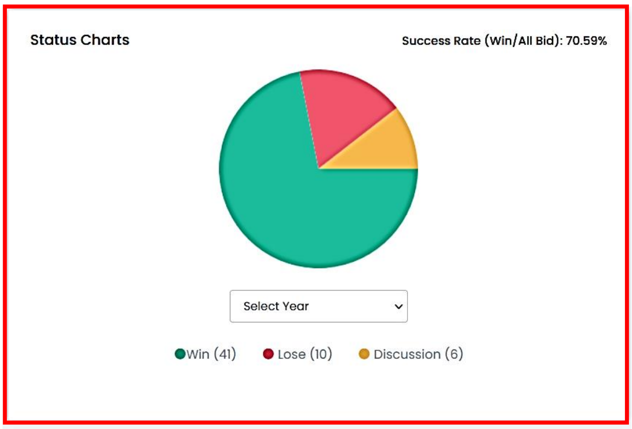


- Log in to your account using your email address and password. Please select 'BD' as your user type.

DASHBOARD:



- In the chart, you can see your overall yearly progress, including the number of projects won, cancelled, on hold, under discussion, and lost, displayed in a stacked bar graph.
- You can also select a year to view the graph year-wise by choosing the desired year from the dropdown menu.



- In the status charts, you can view a pie chart showing your success rate and a visual representation of wins, losses, and discussions year-wise.

Target (All in USD)

Month	Target	Achieved	Hold	Discussion	Remaining
January	37,037	14,638	0	0	22,399
February	43,209	19,358	0	8,684	23,851
March	49,382	21,638	0	0	27,744
April	37,037	39,984	0	0	-2,947
May	37,037	16,517	1,626	86,289	20,520
June	49,382	1,823	0	1,000	47,559
July	49,382	3,722	0	0	45,660
August	43,209	5,529	0	0	37,680
September	49,382	0	0	0	49,382
October	49,382	0	0	0	49,382
November	43,209	0	0	0	43,209
December	37,037	0	0	0	37,037
Total	**524,685**	**123,208**	**1,626**	**95,973**	**401,477**

Achieved 23.48%

- In the target table, you can see your targets, achieved, holds, discussions, and remaining amounts, all in USD, in a monthly format. Accounts can assign you targets. Below, you can see your achieved Progress.

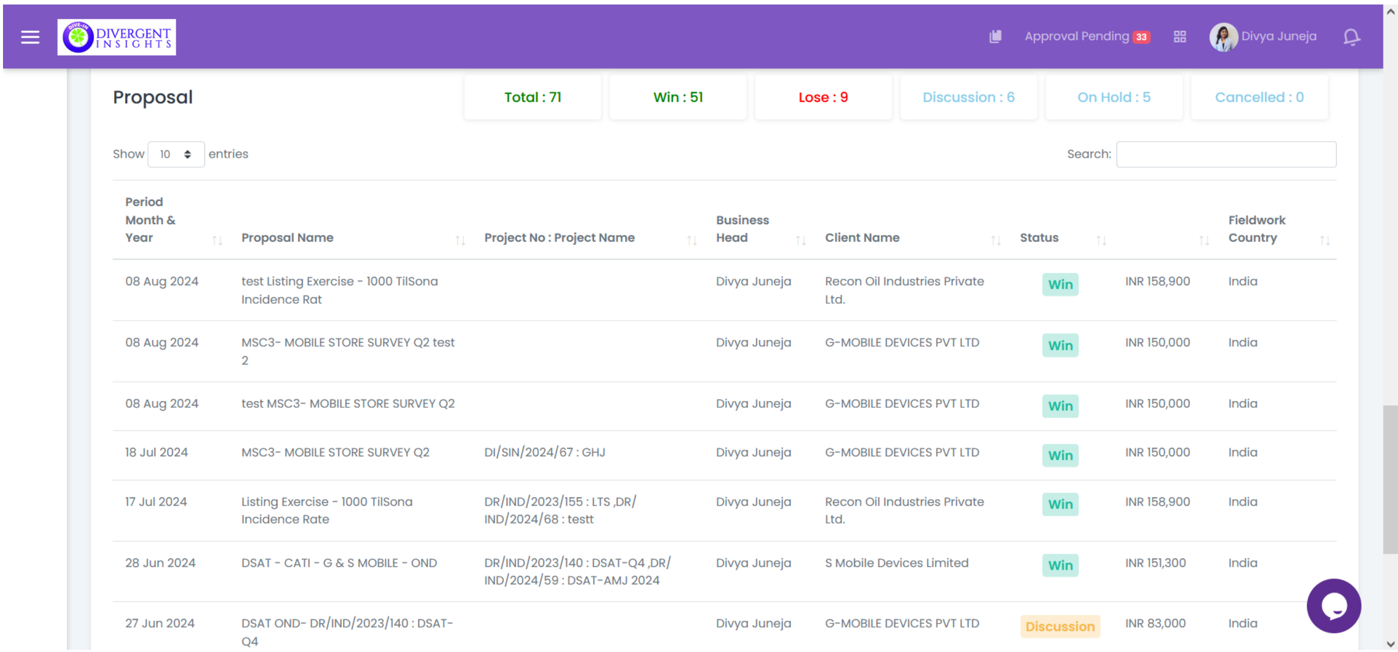
Conversion Ratio Please Select

Show entries

Month	Win	Lose	Hold	Discussion
Jan	1	3	0	0
Feb	3	0	1	0
Mar	1	0	0	0
Apr	5	1	0	0
May	3	0	3	1
Jun	1	1	1	0
Jul	3	0	0	0
Aug	4	0	0	0
Total	21	5	5	1

Showing 1 to 2 of 2 entries Previous 1 Next

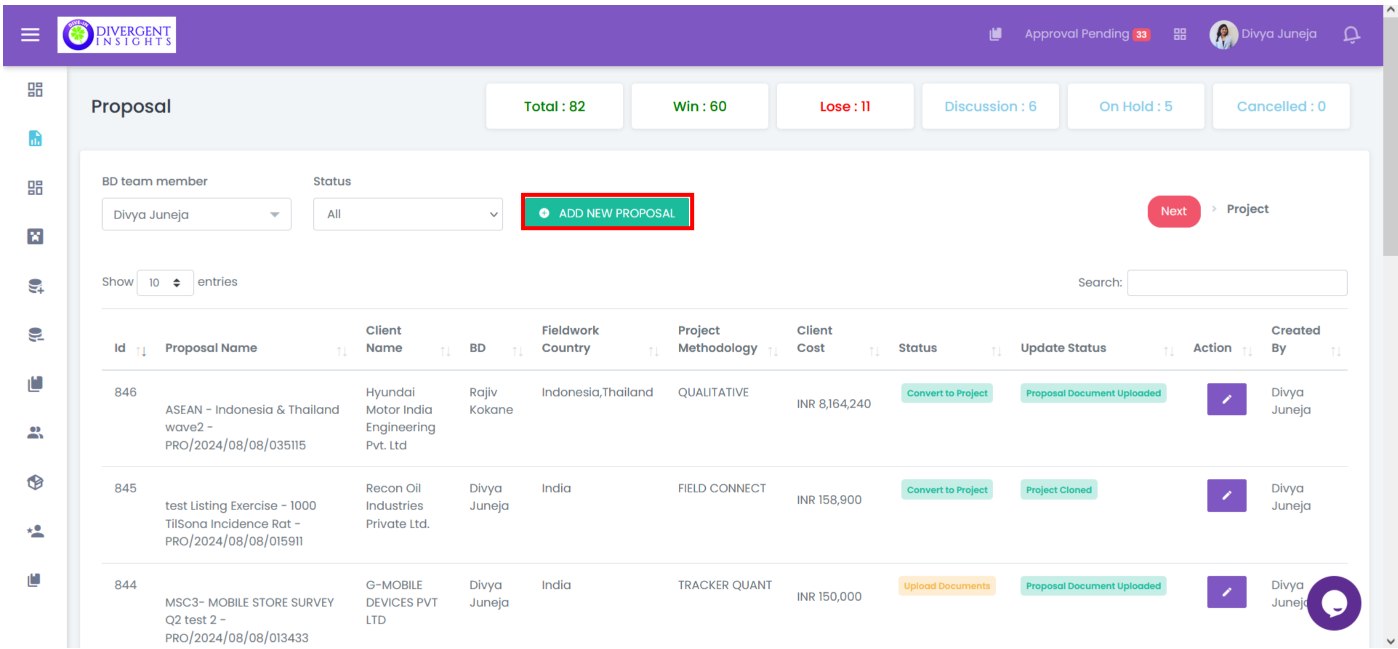
- The conversion ratio table shows how many have been won, lost, put on hold, and are under discussion.



- As a BD, you can see all the proposals available to you.

PROPOSAL:

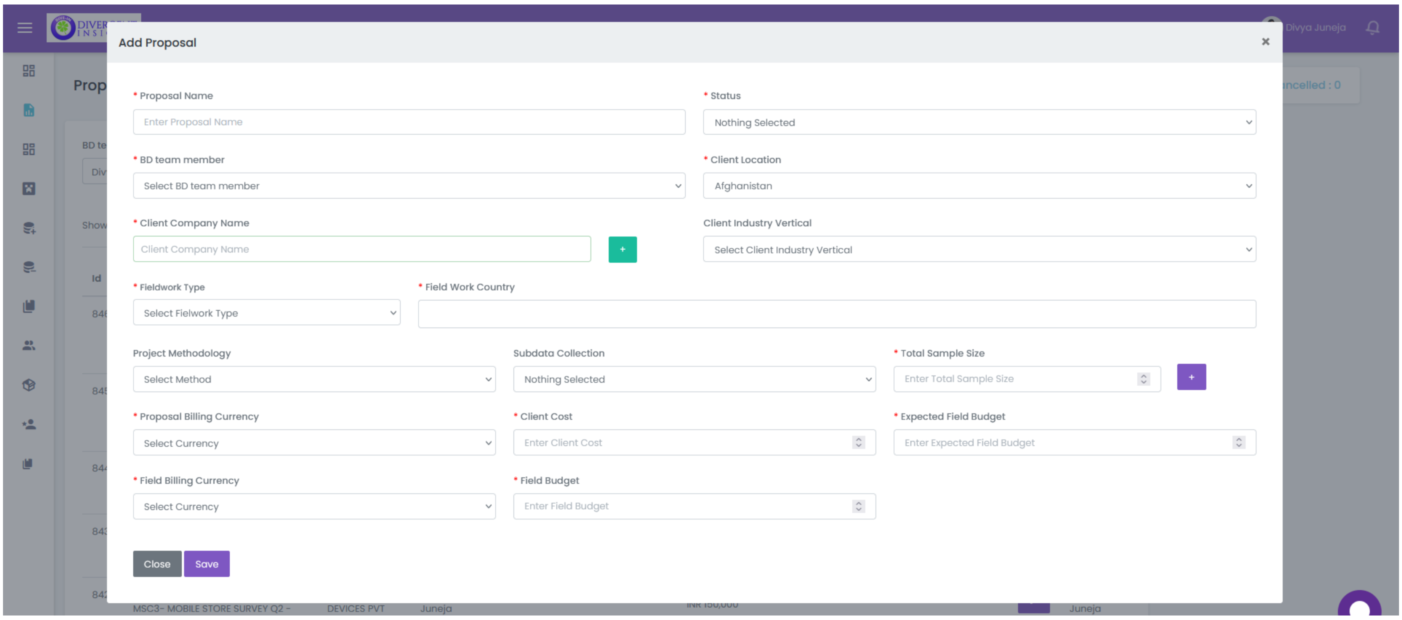
BD can add and see their own proposals and if another BD assign you as Project Lead, then BD can also see those proposal also.



You will get status wise Count of Proposals on this page.
You can Select Status to Filter out Proposals.
To add a proposal, click on 'Add New Proposal'.

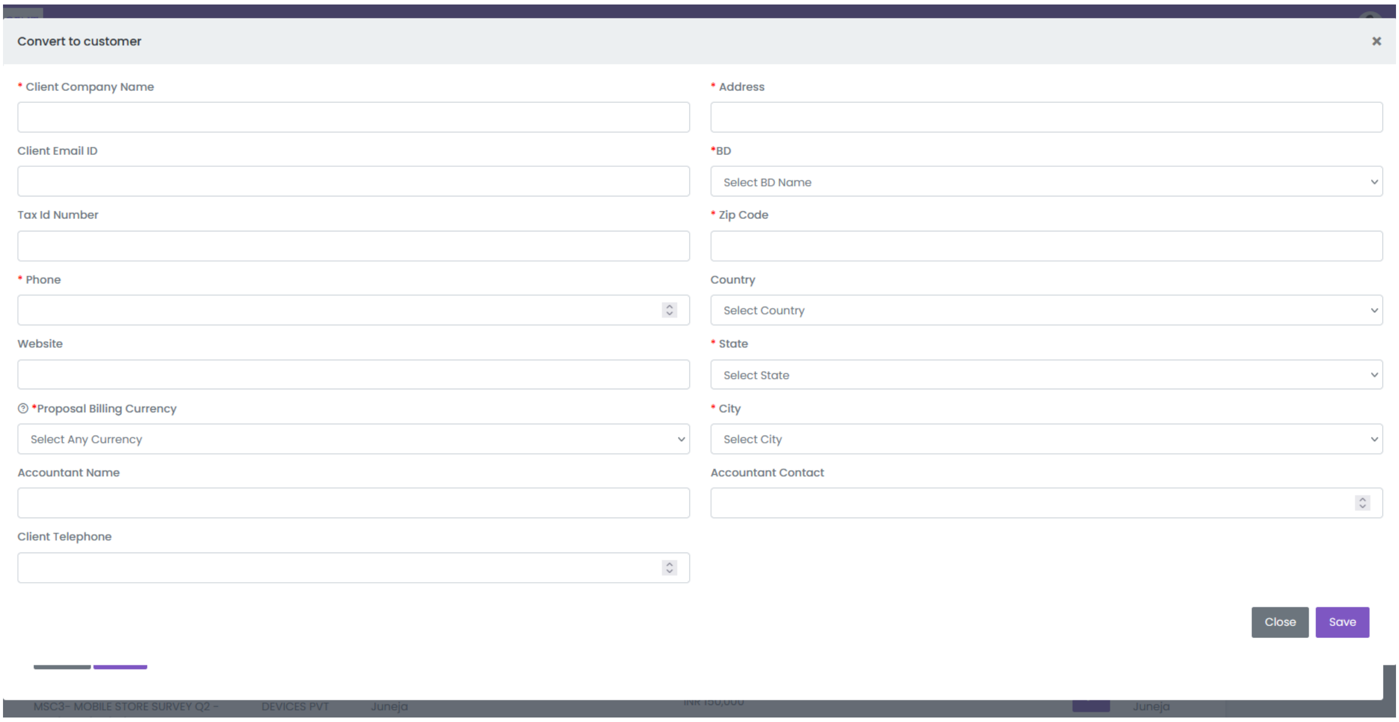
STEPS TO ADD PROPOSAL:

STEP 1: ADD PROPOSAL



Enter Details of Proposal In this Form.
Name: Enter Proposal Name
Status: 1. If Proposal is Lose, Mention Reason for Losing it
2 if Proposal is Won, Fill Field Billing currency and Field Budget.
3.If the Proposal is in Discussion, On hold you will not Have option for Filling Field Billing currency and Field Budget.

Important: If client name is not in the 'Client Company Name' Dropdown, Then click on + Button as given in above image. After clicking on the + button you will able to see below form.



Fill these Client Details, save it Then again Search for Client name (re-enter first 3 letter of added client) in Add Proposal Form.

New Feature:

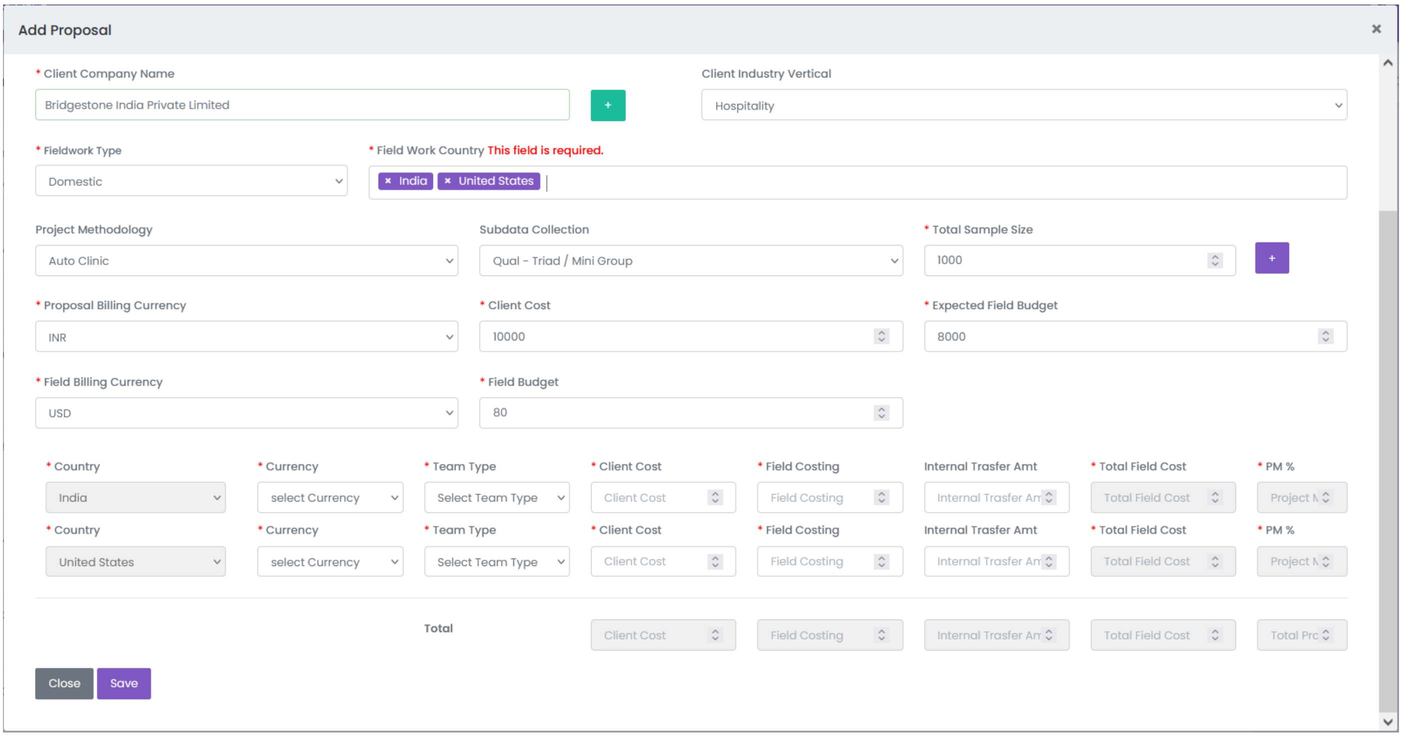
When Field Work Country is selected, Country Wise Costs can be added as given in below image.

In Image Below, I have Selected India and United States therefore two rows have been appeared the last to enter country wise client and field costing.

- **Total of country wise 'Client costs' Should not be Greater than 'Client Costing' next to Proposal Billing Currency In proposal.**
- **Total of country wise 'Field costing' Should not be Greater than 'Expected Field Budget' or 'Field Budget' In proposal.**

Internal transfer: If you have any internal transfer with respect to any country, then you can enter the amount here.

Percentage margin: This will be Automatically Calculated.



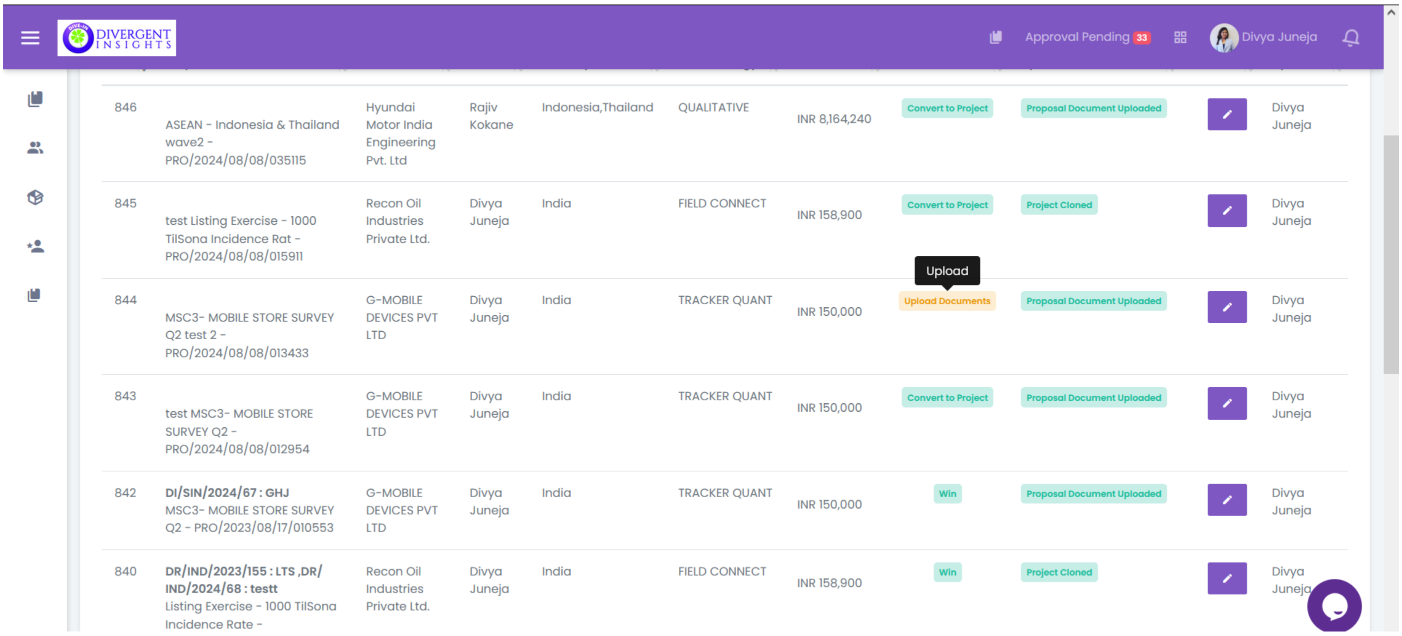
STEP 2: UPLOAD DOCUMENTS:

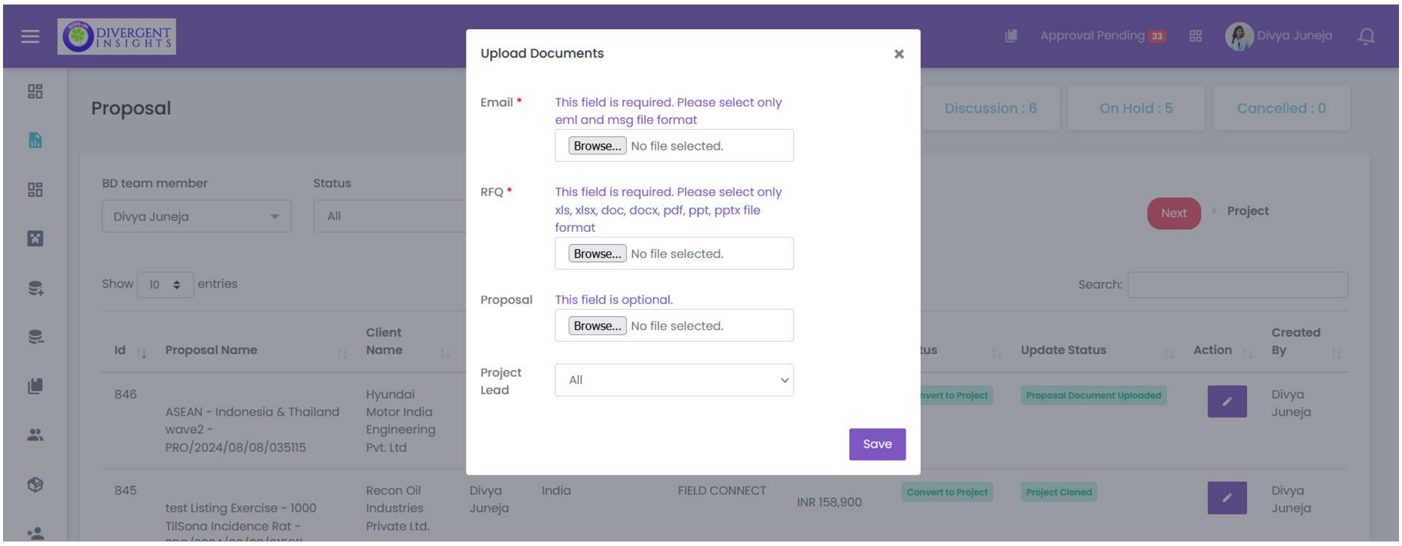
After creating a proposal, you must upload proposal related documents.

Documents required are upload Email copy, RFQ, and Proposal.

It is the mandatory step. Only after uploading documents, BD will be able to convert it to project.

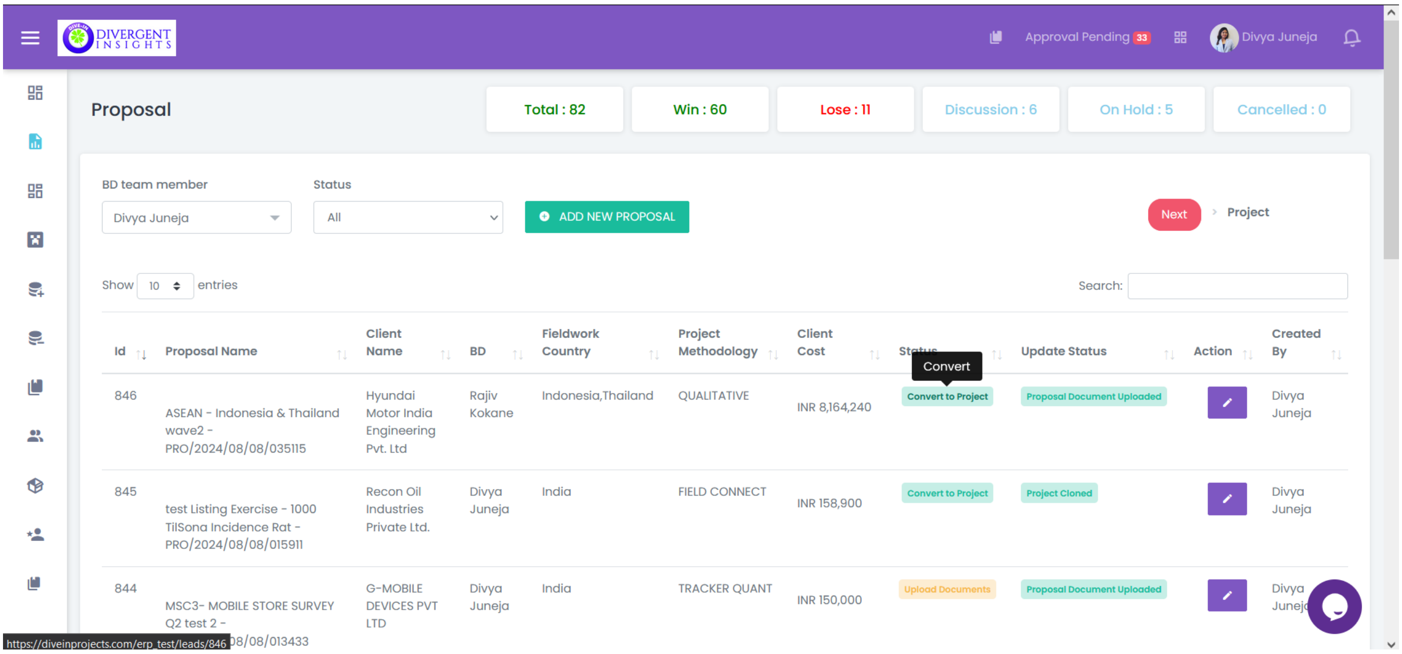
To upload Documents, click on upload button present in status.



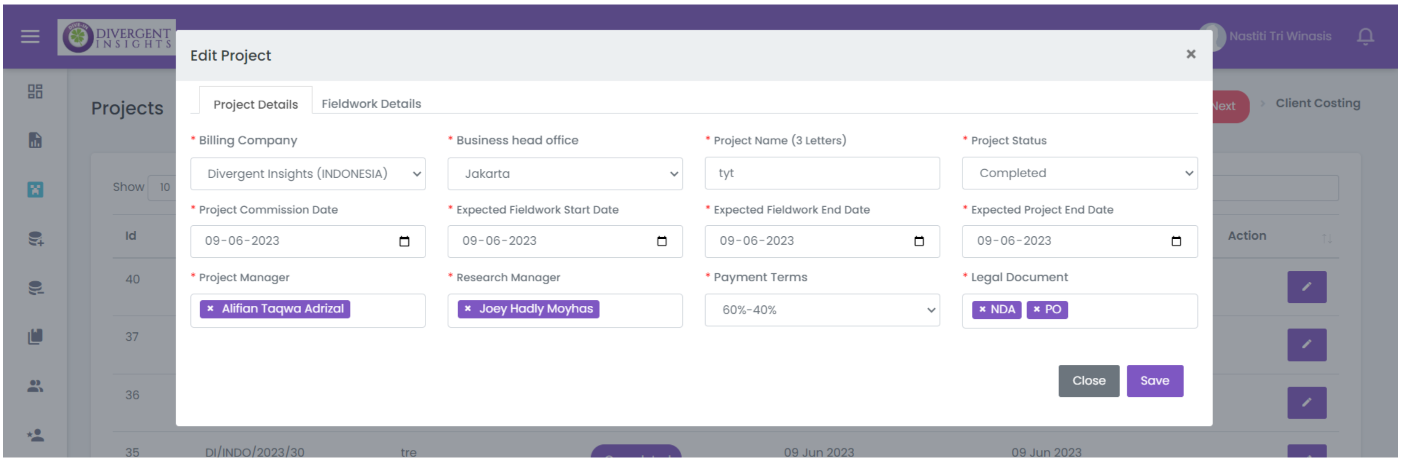


In case after creating proposal, you want someone else to take this project ahead then, you can Select Project Lead While Uploading Document. So, person who is selected as Project Lead can see this proposal in their login and convert it to project and continue with next tasks.
If you don't want to Assign it to anyone, you can Keep it as it is.

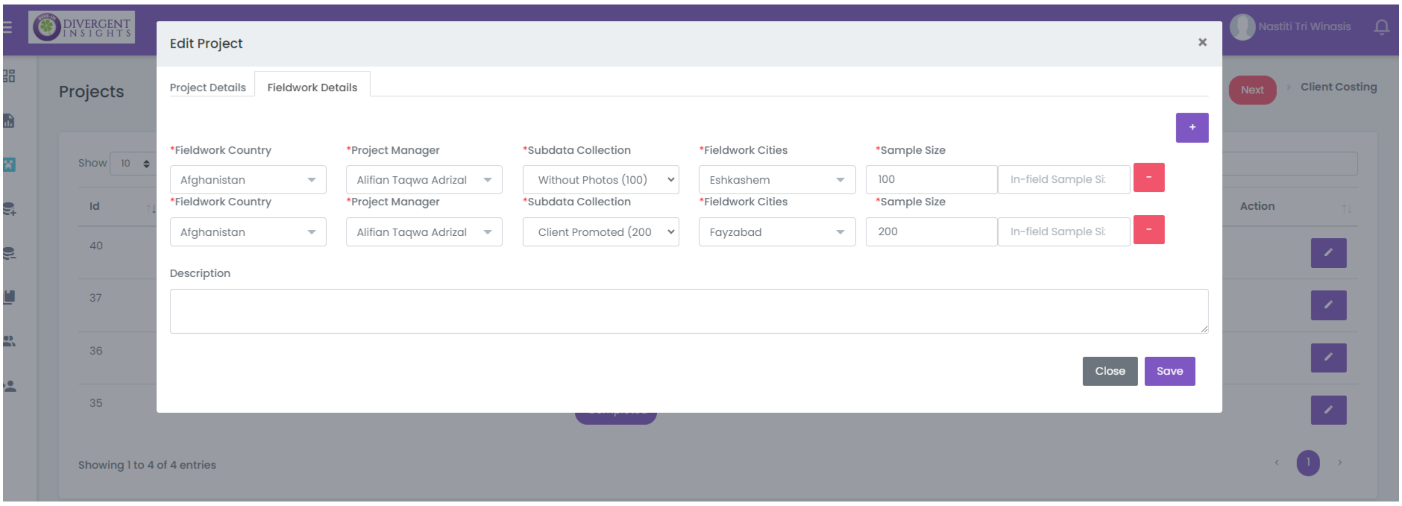
STEP 3: CONVERT PROPOSAL TO PROJECT:
As you can see, to convert proposal to a project you must click on '**convert to proposal'** button.
This convert button will appear only when project is won and proposal documents for such proposal is uploaded.



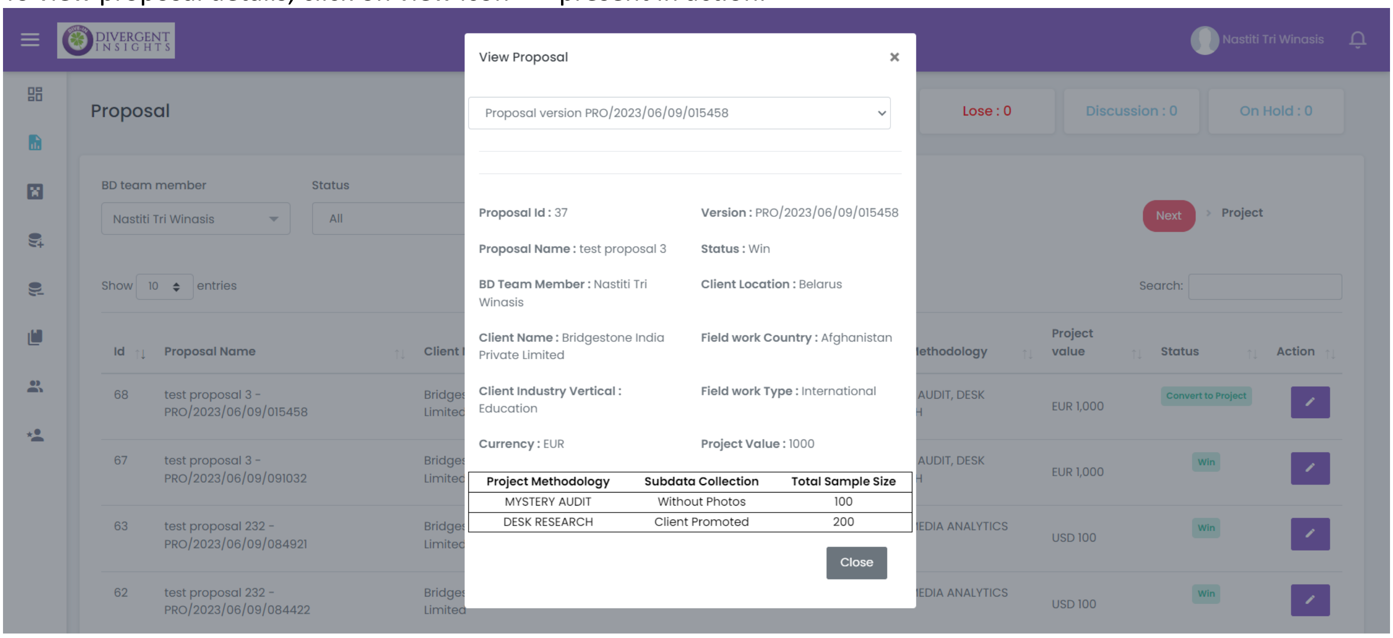
You must fill all mandatory (*) details.



As you can see here is 2nd tab named Fieldwork Details. It is important to fill exact sample details to match the proposal details else it will not save as project.

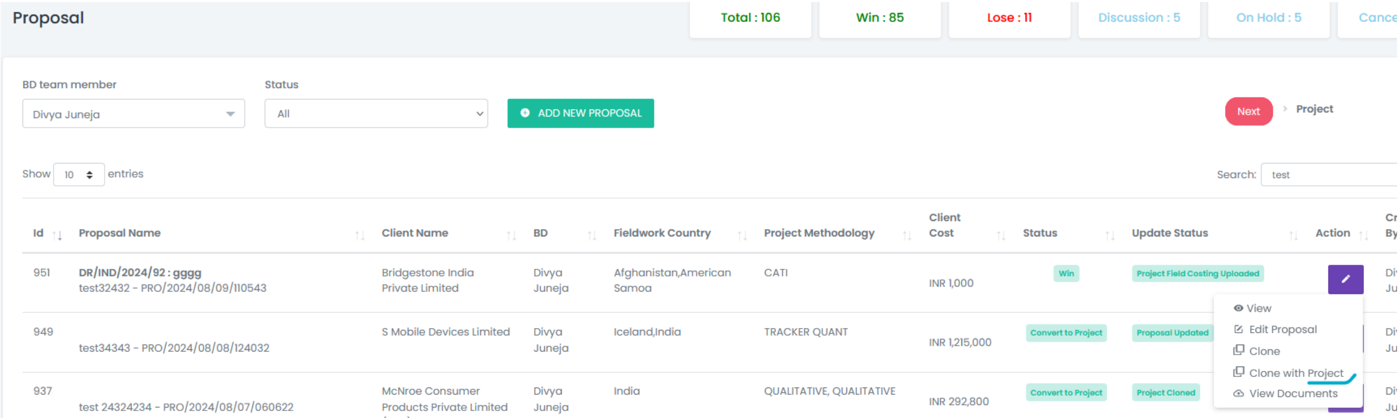


To view proposal details, click on view icon present in action.



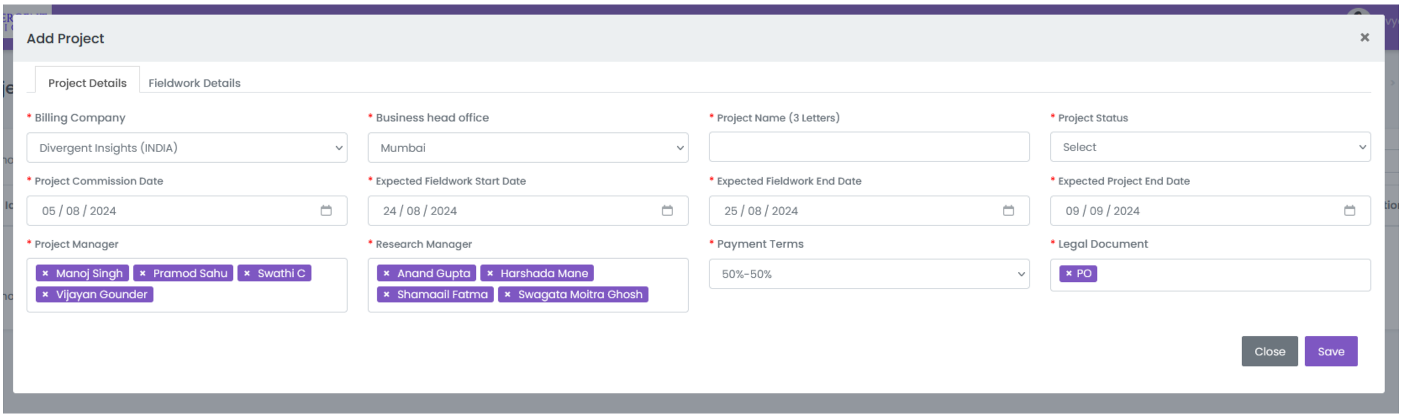
New Feature:

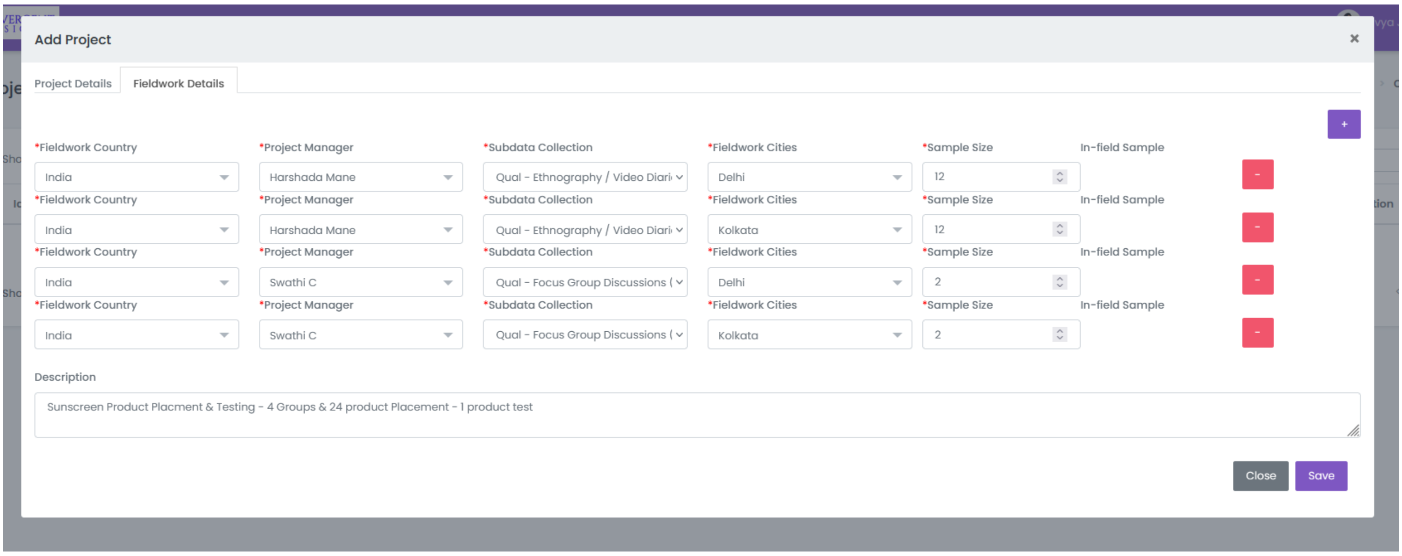
You can clone a proposal along with its project details, meaning if you select 'clone with project' while creating clone like shown in below screenshot,



then if such proposal is gets converted to project then you will be able see projects details gets auto filled while converting to project.

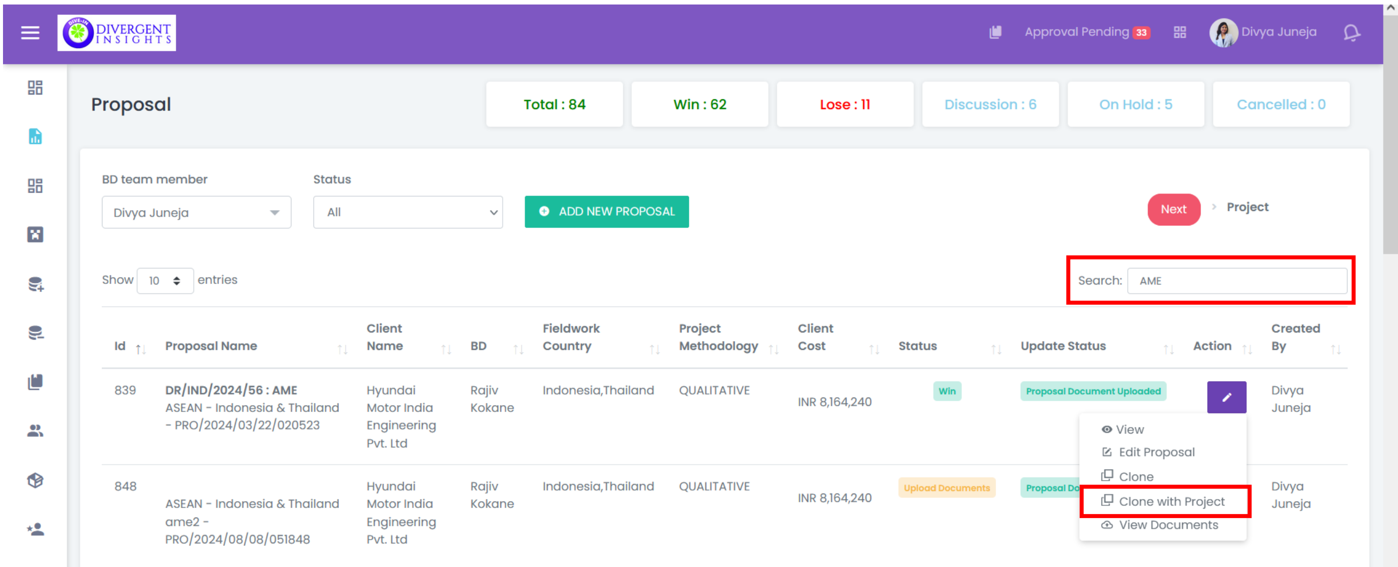
when converting to a project, project details will get automatically populated. Make any necessary changes, then click 'Save'.



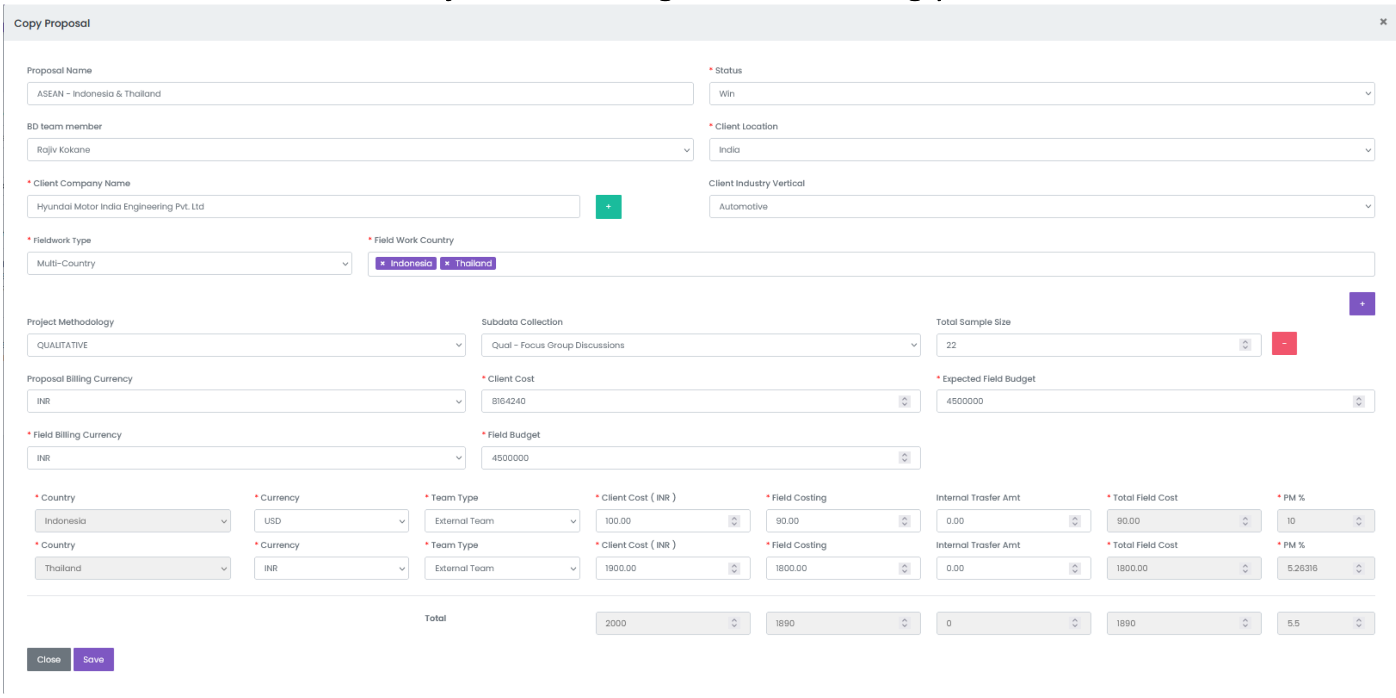


To clone Project:

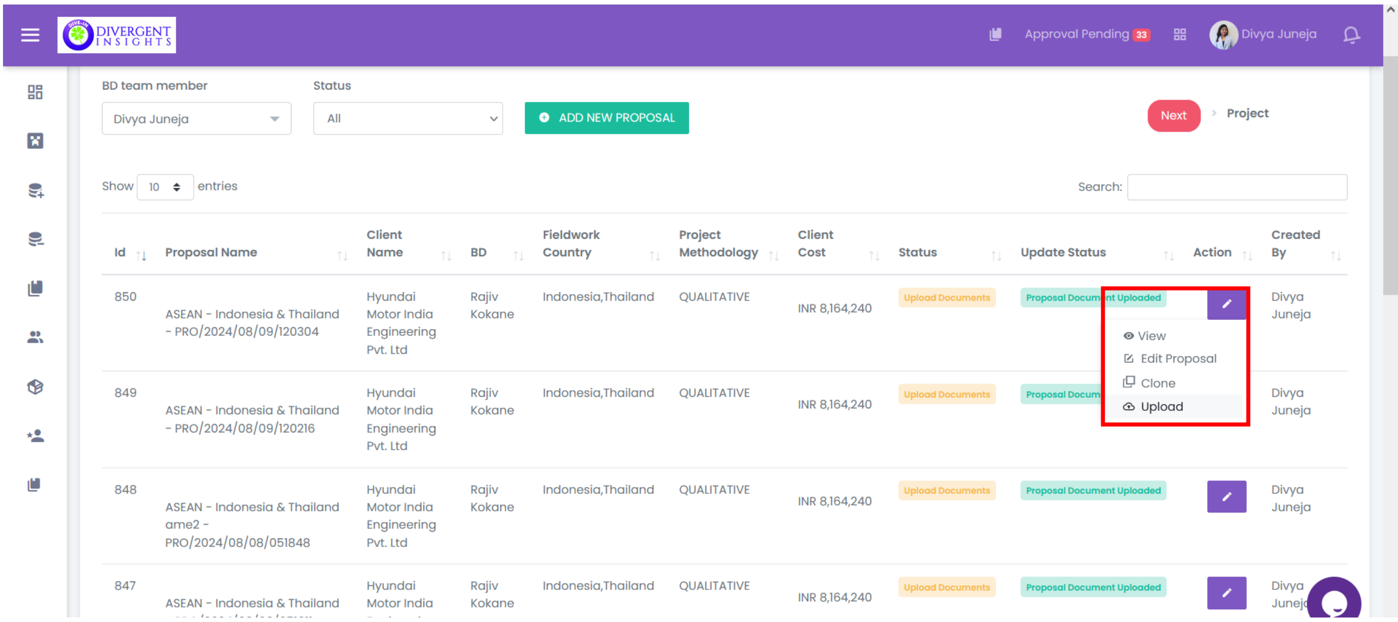
1. You have to search Project name in Proposal Module List. Eg. AME Project.



2. Click on Clone with Project And Change data accordingly. And Click Save.



3. Created new Proposal will Be Displayed on the top. Upload Documents for that project and then convert it to Project



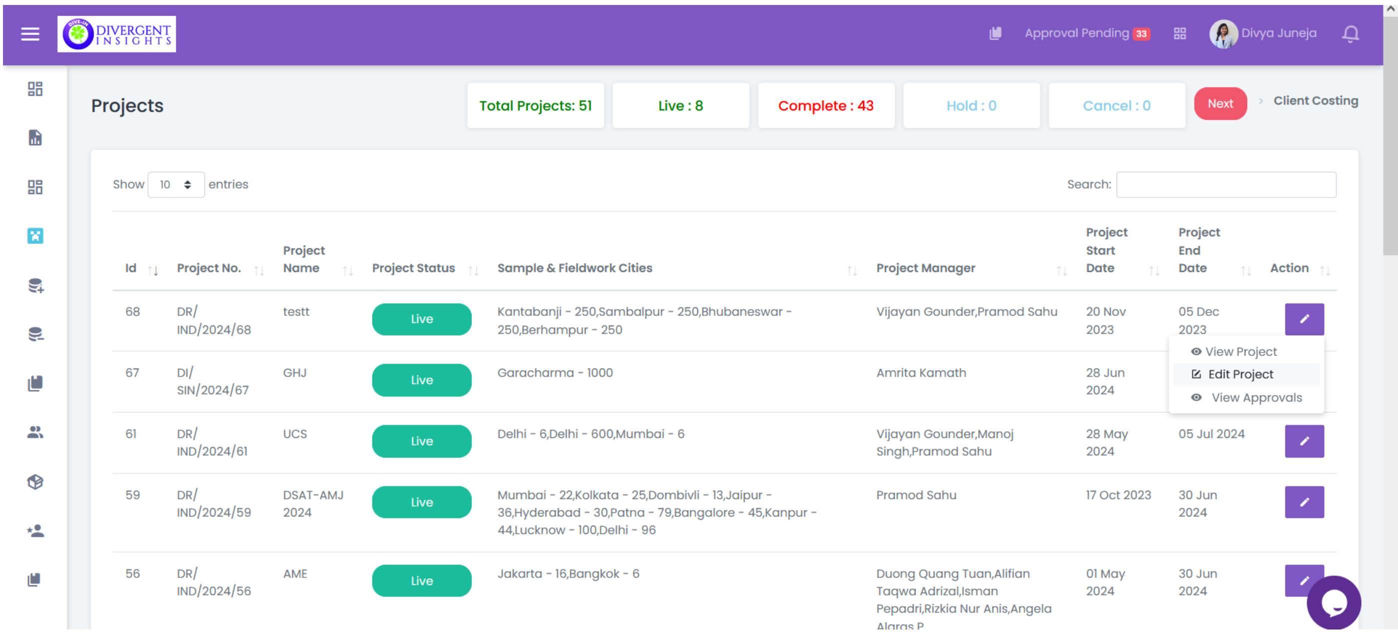
4. After Uploading Documents, Convert Proposal to Project, rest all will be Same.

PROJECTS:

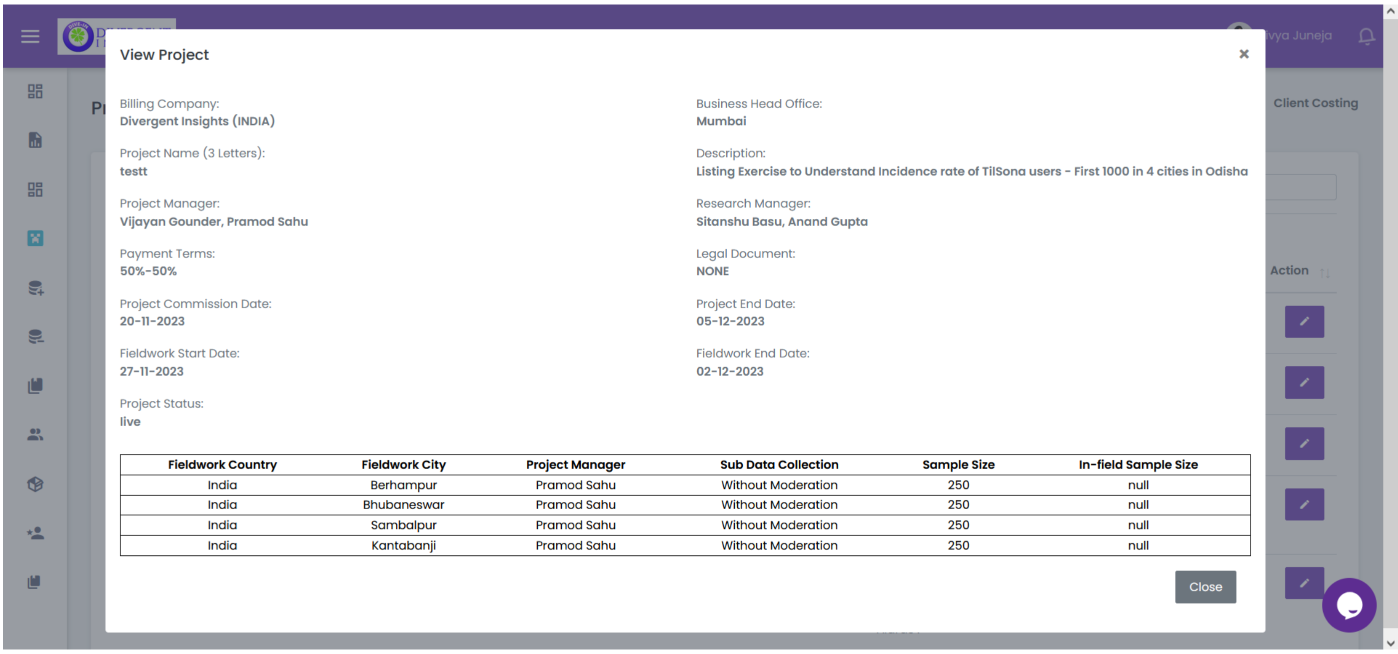
BD can view & access only own projects.

BD can edit projects.

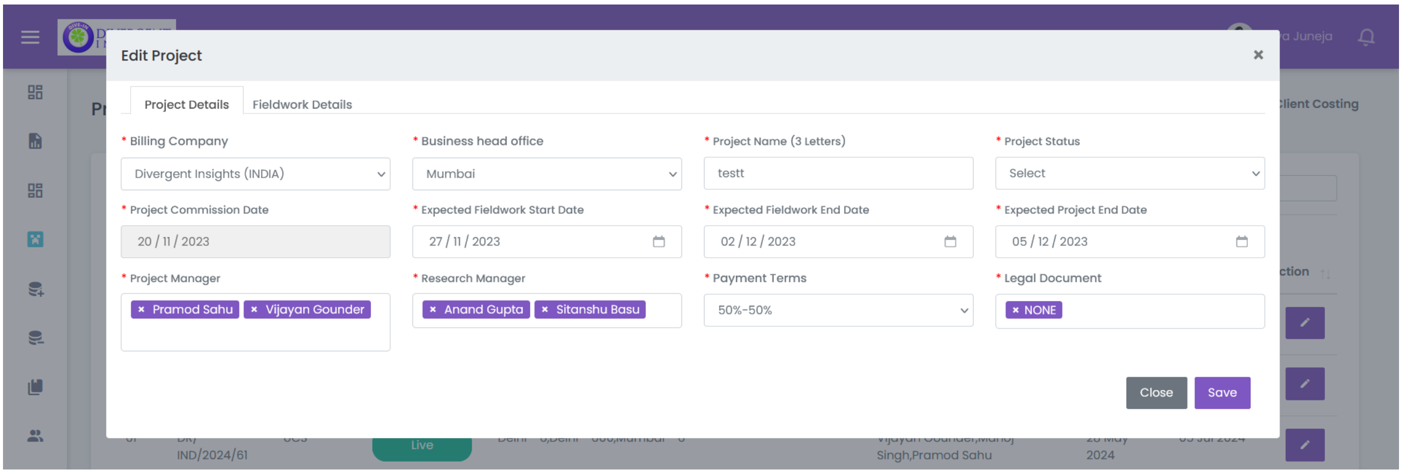
BD cannot Clone Project Directly.



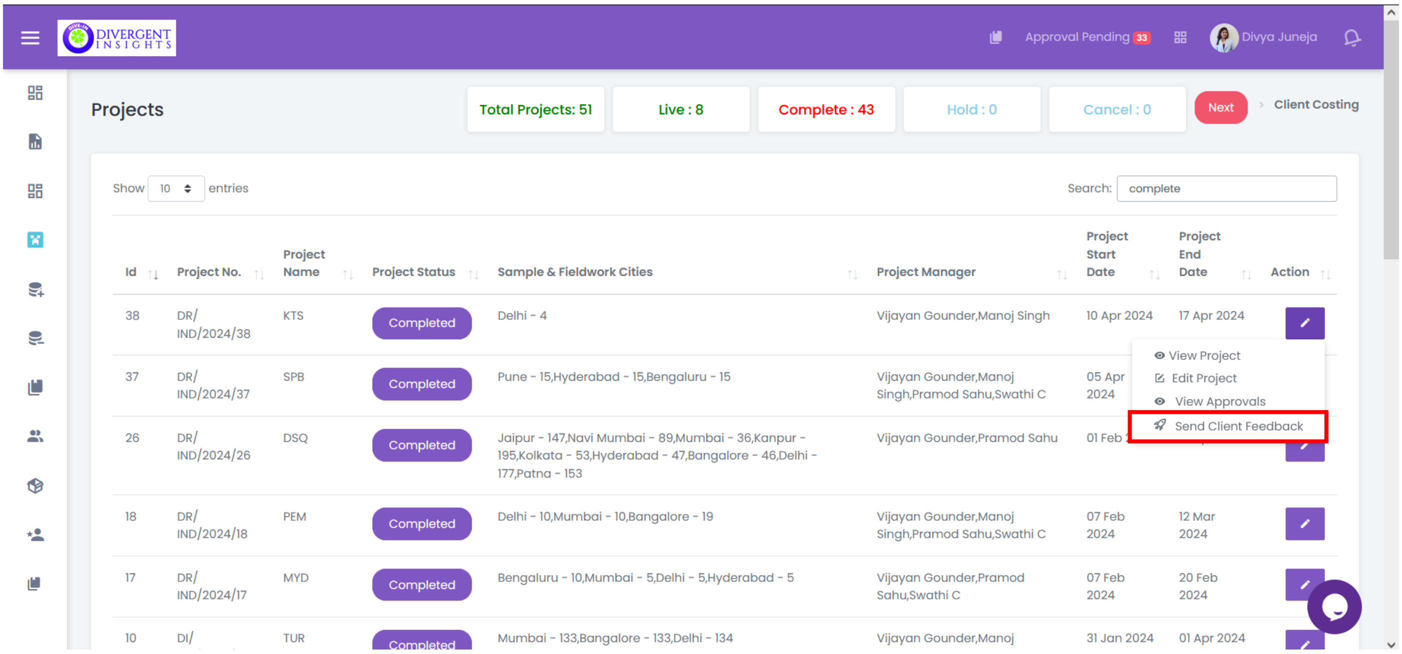
To view project details, click on view icon given in Action column.



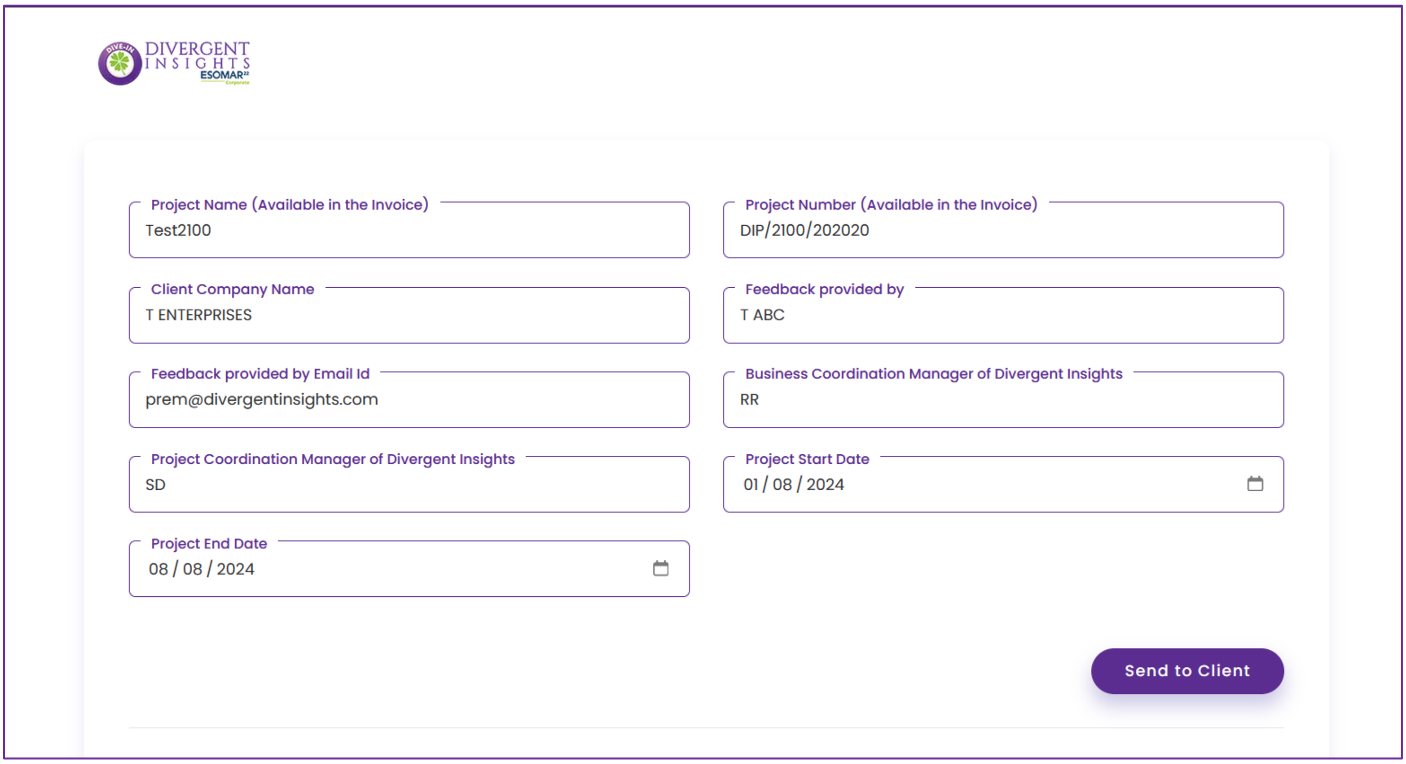
To Edit project details, click on edit icon given in Action column. Once you click on edit icon popup window will appear so that you can edit project details.
Update details that you want to change and then click on save button.



Sending Client Feedback Links:
BD can send a Feedback Link to our Clients.
To send client feedback link go to action button and then select ‘Send Client Feedback’
Note: this option will be visible only after project status gets updated to ‘completed’.



As you can see after clicking on the ‘Send Client Feedback’ button you will be redirected to following form.



Here you have to fill in the above form and click on the ‘Send to Client‘ button, Remember to enter clients email id at the place of ‘Feedback provide by Email Id’ cause the email address you enter here will get the mail containing feedback/survey link.

Client will receive below Feedback form,

NA	1	2	3	4	5	6	7
Not Applicable	Extremely Dissatisfied	Dissatisfied	Somewhat Dissatisfied	Neutral	Somewhat Satisfied	Satisfied	Extremely Satisfied

01) Brief acknowledgement & Submission of Proposal – Response Time / Turn-Around Time

1 2 3 4 5 6 7 NA

02) Quality of Programming

1 2 3 4 5 6 7 NA

03) Timeliness of Programming

1 2 3 4 5 6 7 NA

04) Quality of data collection

1 2 3 4 5 6 7 NA

05) Timeliness of data collection

1 2 3 4 5 6 7 NA

06) Quality of Deliverables (Data / Transcripts / Report)

1 2 3 4 5 6 7 NA

07) Timeliness of Deliverables

1 2 3 4 5 6 7 NA

08) Timeliness of Billing & other documents processing

1 2 3 4 5 6 7 NA

09) Business Development Manager Skills

1 2 3 4 5 6 7 NA

10) Project Manager Coordination Skills

1 2 3 4 5 6 7 NA

11) Overall Project Management

1 2 3 4 5 6 7 NA

12) Overall Client's Experience

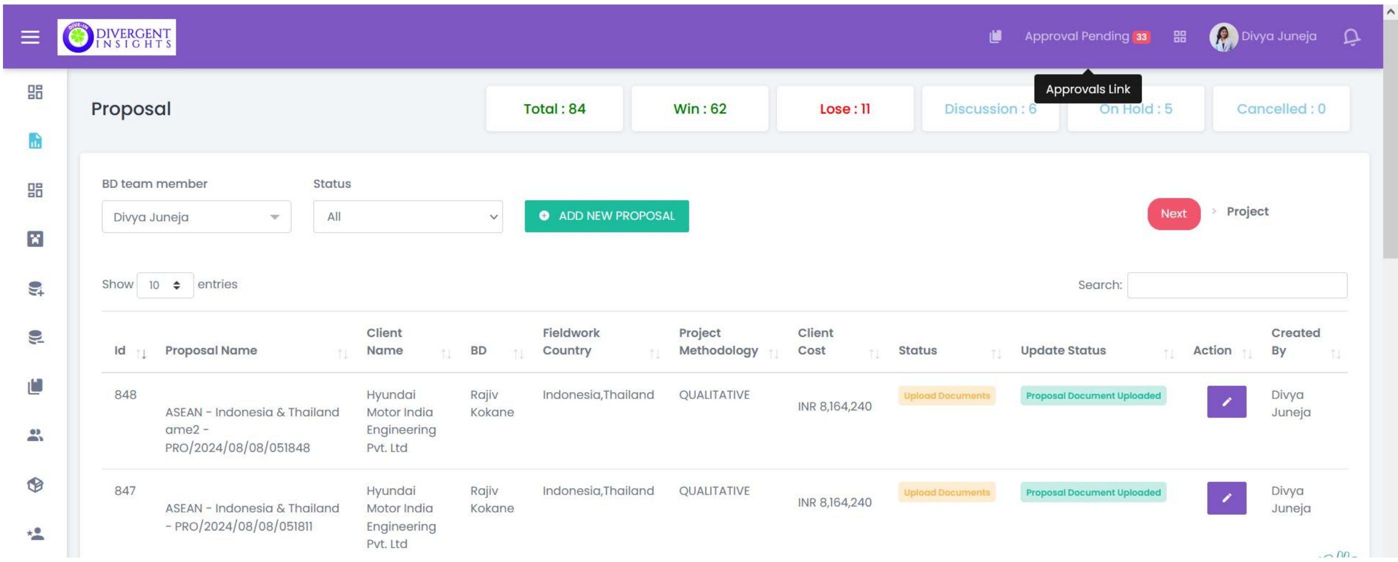
1 2 3 4 5 6 7 NA

Submit

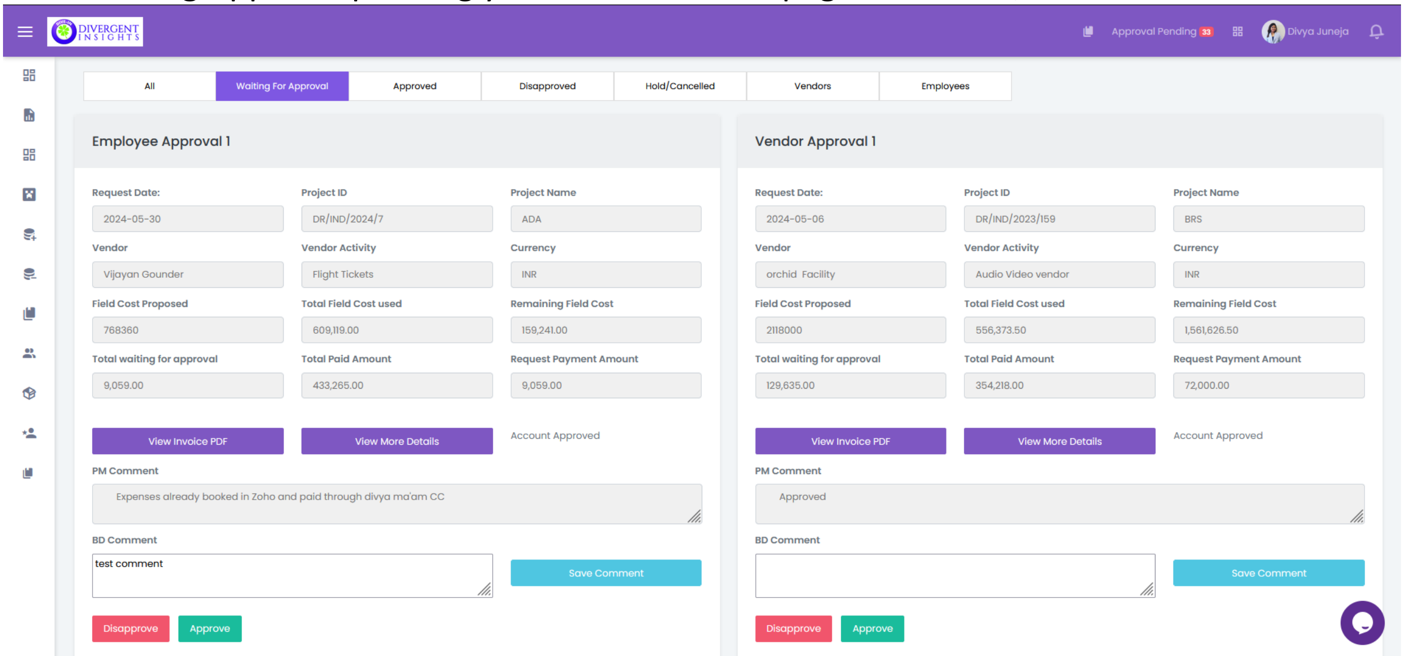
Client have to complete the survey/Feedback form and click 'Submit'.

APPROVAL/DISAPPROVAL:

BD has a permission to Approve/ Disapprove payment Requests.
Click on the 'Approval Pending' as shown in below screenshot.



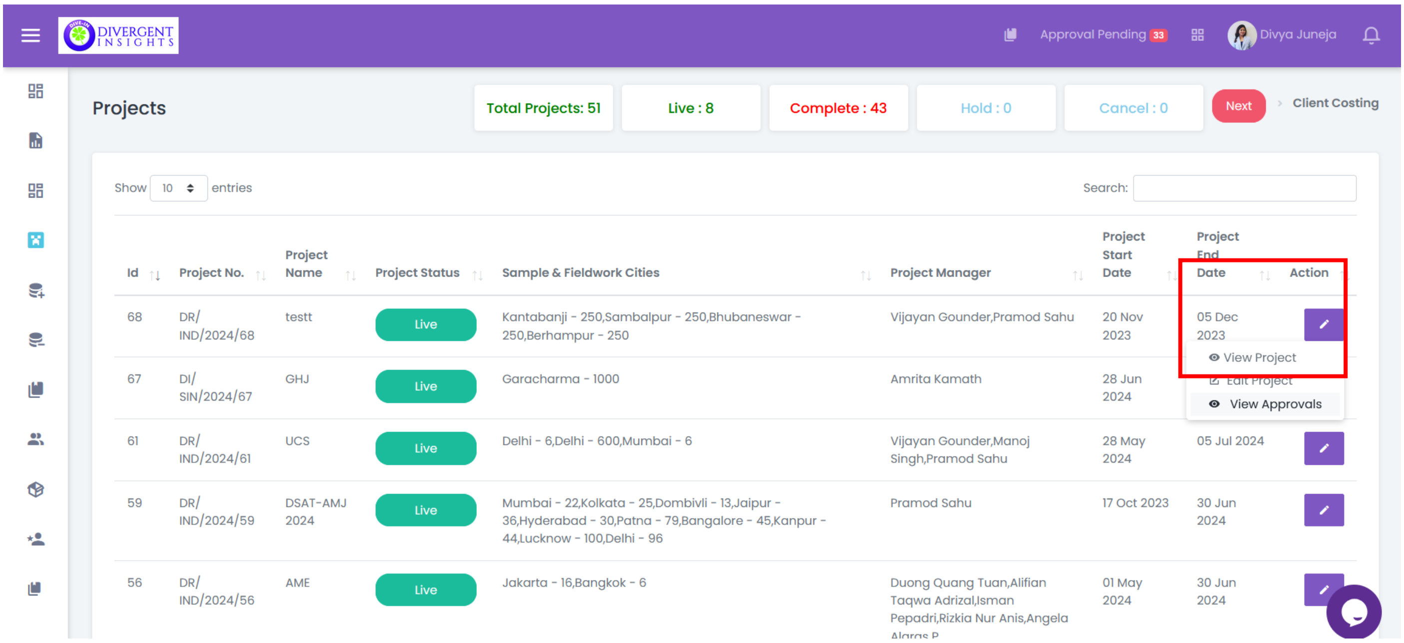
After clicking Approval pending you will able to see page like below,



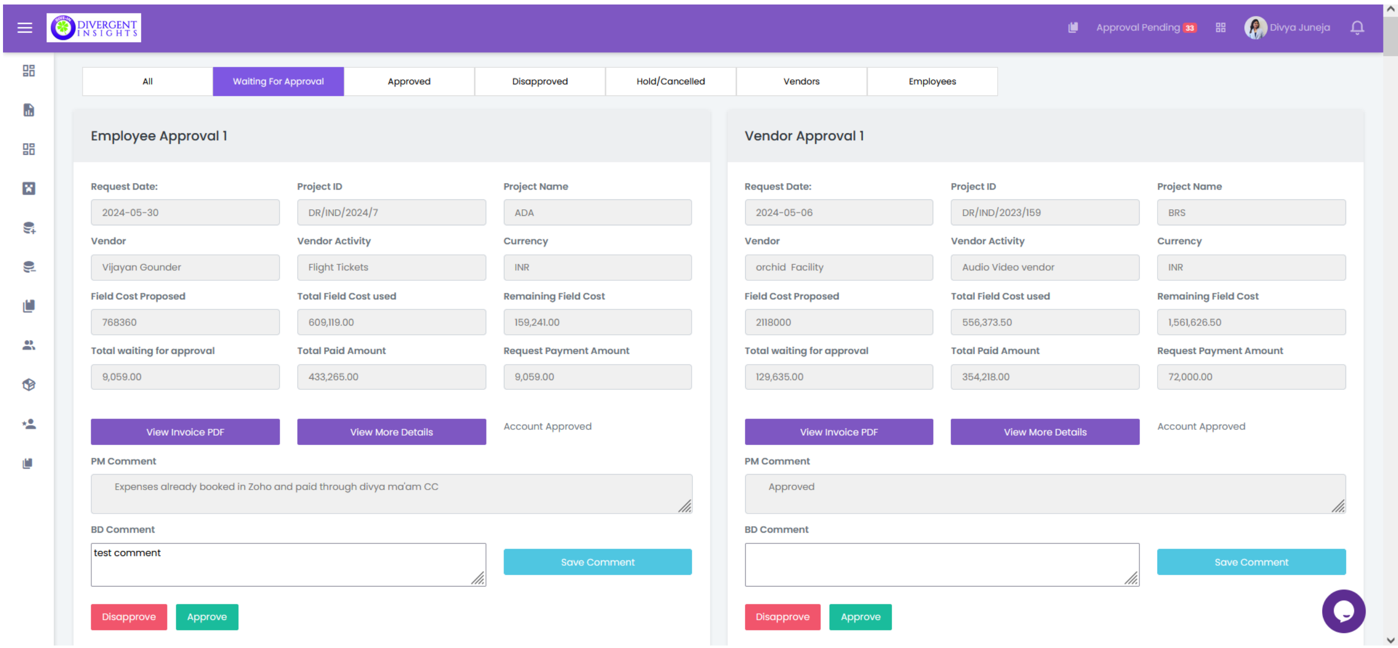
Here,

- You can filter requests by various statuses, such as All, Waiting for Approval, Approved, Disapproved, Hold/Cancel, and others.
- Click on View Invoice PDF to Get Invoices uploaded by Project managers.
- Click on More Details to get Detailed information Like Project Budget, Comment History, project History.

BD can also get Project wise Approval Request from Project Module.



When the project manager adds the vendor request payment to release the BD will receive the email with the link of approval of request payment, and then BD can approve or disapprove the request and once done PM and Accounts will receive email intimation for the same.

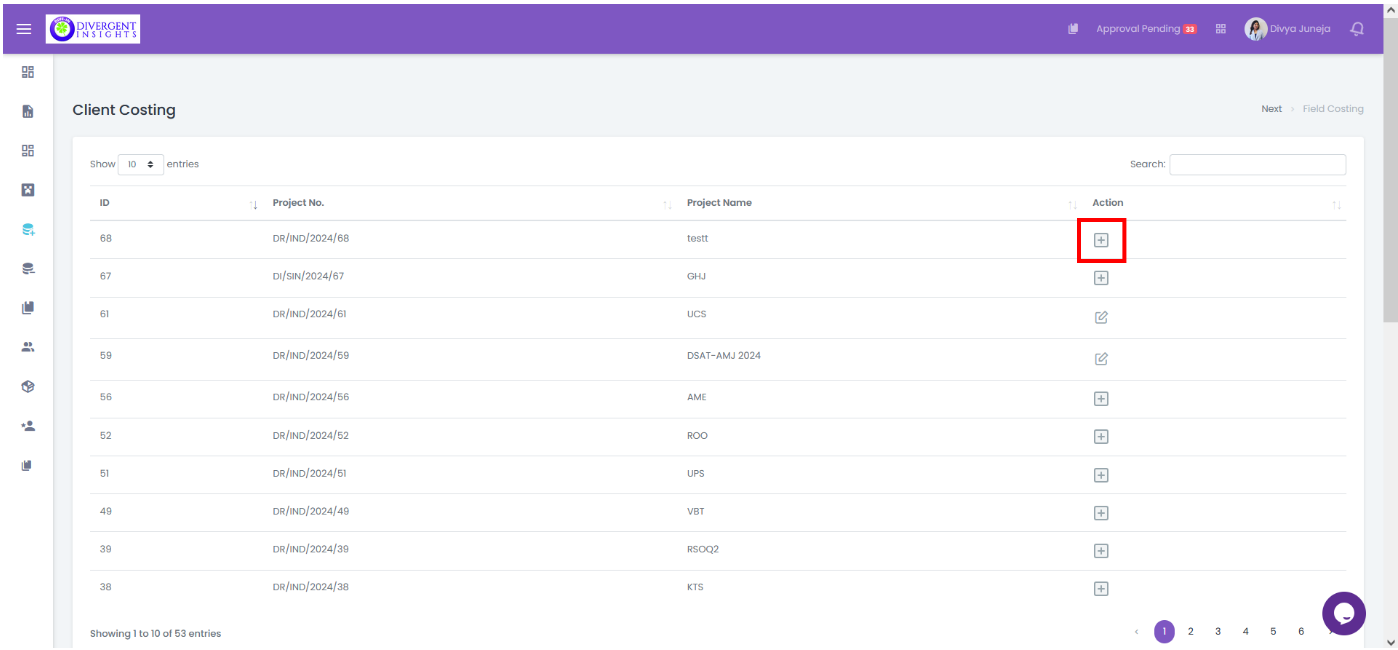


- Here BD can see the details of request payment. BD can give the relevant comment and click on 'Approve' for approval and 'Disapprove' for disapproval. And if BD doesn't want to approve or disapprove but just wanted to give comment then enter the comment and click on the 'Save Comment' Button.
- These comments can see by project manager and accounts in the request payment history in request payment module.
- If the BD approves the request the request will be lock project manager can't change furthermore and email as approved send to project manager and account department for further clearance of payment.

CLIENT COSTING:

BD must add client costing for added projects.

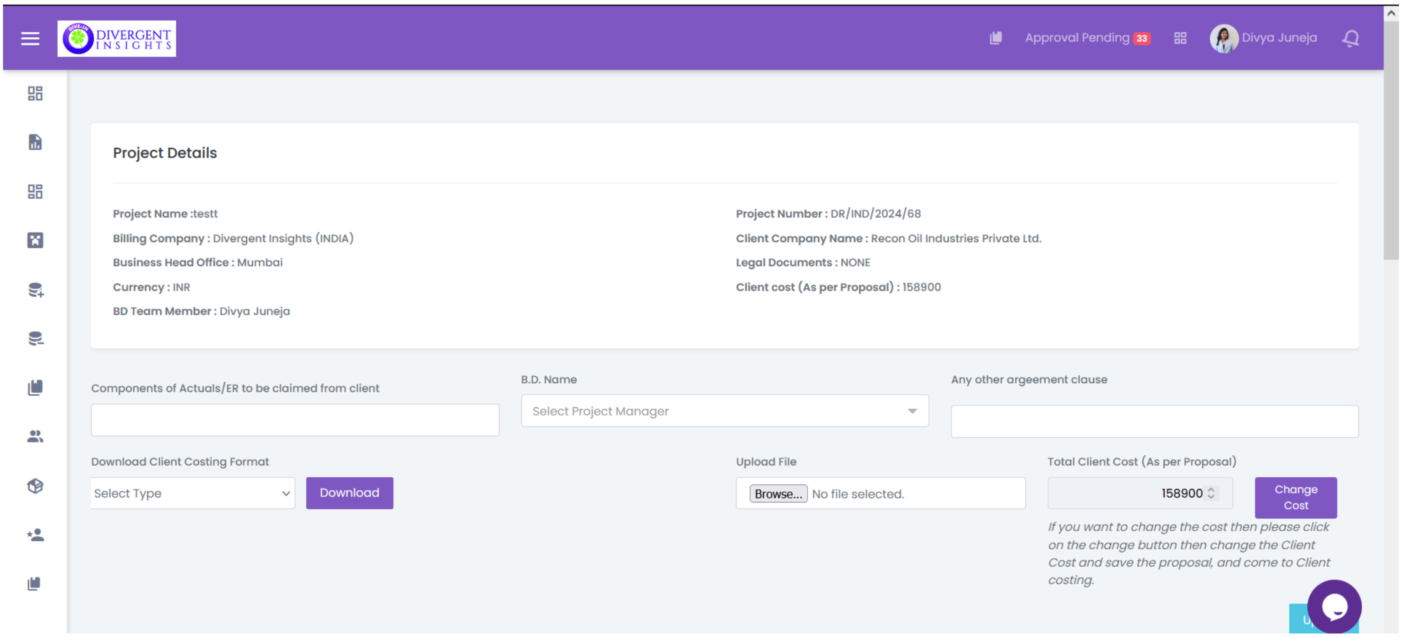
To add client costing you must click on add icon given in Action column.



BD can choose client costing format (online or offline) to download and upload costing sheet.

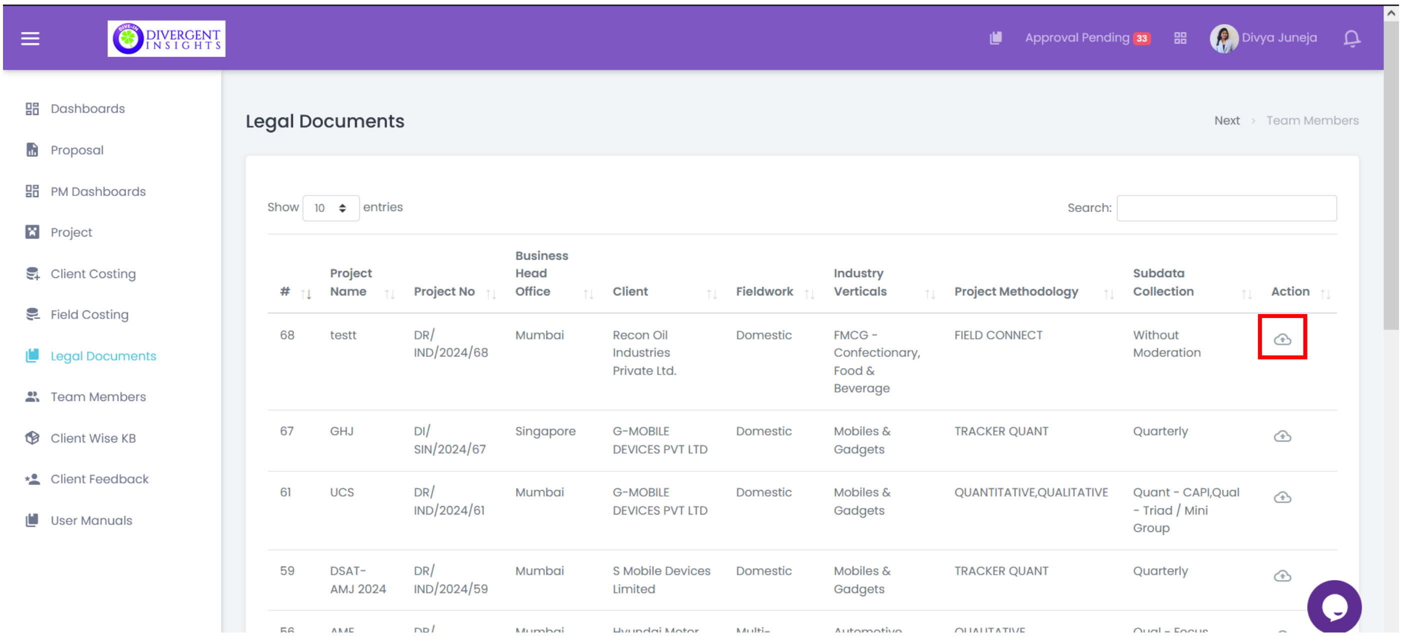
Steps to download client costing format.

1. Click on Download Client Costing Format dropdown.
2. Select type online or offline.
3. Click on Download button.

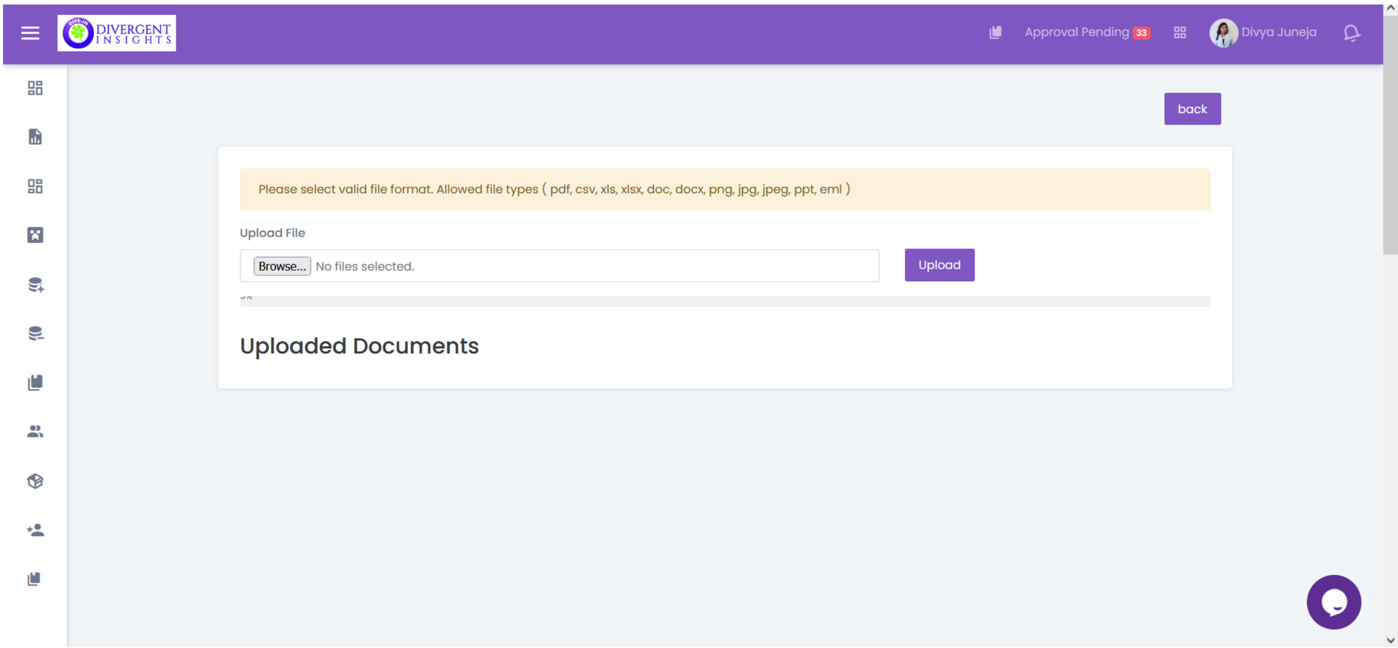


LEGAL DOCUMENTS:

BD can upload legal documents for existing projects. To upload document, then click on upload icon .



As you can see in above image to upload legal documents you have to click on upload button present in action. You can upload multiple files.

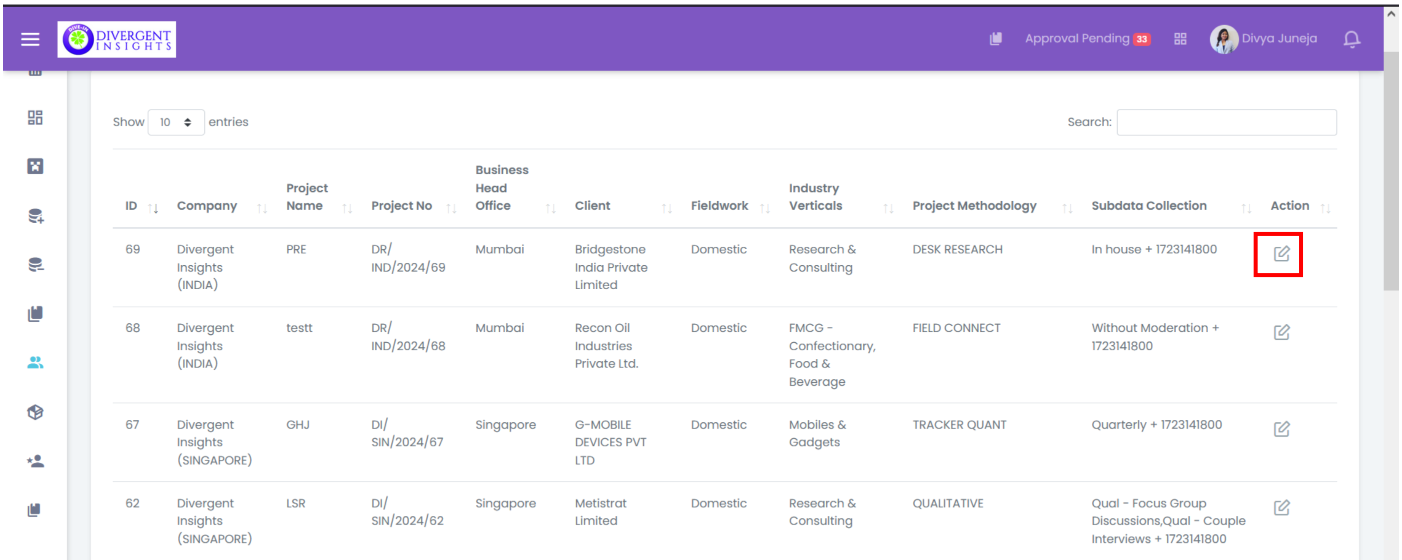


TEAM MEMBERS:

BD can access Team Members. BD/PM can Add team members Only after Field Costing is added.

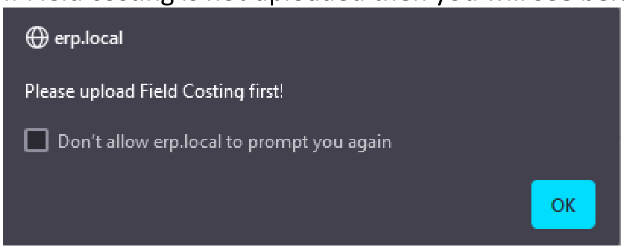
Team members is list of internal team and external vendors working together on the same project offering different services. The edit icon is visible till 15 days after project end date. After 15 days of project completion date the access of team member edit will be given only to accounts before 15 days after project end date you have to complete all vendor payment request.

1. Click on Edit Button to Add team Members.

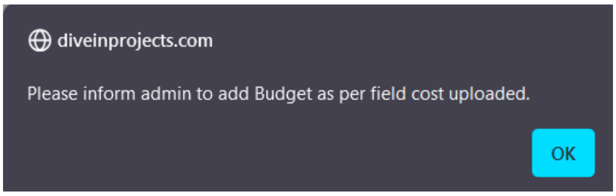


ID	Company	Project Name	Project No	Business Head Office	Client	Fieldwork	Industry Verticals	Project Methodology	Subdata Collection	Action
69	Divergent Insights (INDIA)	PRE	DR/ IND/2024/69	Mumbai	Bridgestone India Private Limited	Domestic	Research & Consulting	DESK RESEARCH	In house + 1723141800	
68	Divergent Insights (INDIA)	testt	DR/ IND/2024/68	Mumbai	Recon Oil Industries Private Ltd.	Domestic	FMCG - Confectionary, Food & Beverage	FIELD CONNECT	Without Moderation + 1723141800	
67	Divergent Insights (SINGAPORE)	GHJ	DI/ SIN/2024/67	Singapore	G-MOBILE DEVICES PVT LTD	Domestic	Mobiles & Gadgets	TRACKER QUANT	Quarterly + 1723141800	
62	Divergent Insights (SINGAPORE)	LSR	DI/ SIN/2024/62	Singapore	Metistrat Limited	Domestic	Research & Consulting	QUALITATIVE	Qual - Focus Group Discussions,Qual - Couple Interviews + 1723141800	

If Field costing is not uploaded then you will see below warning message:

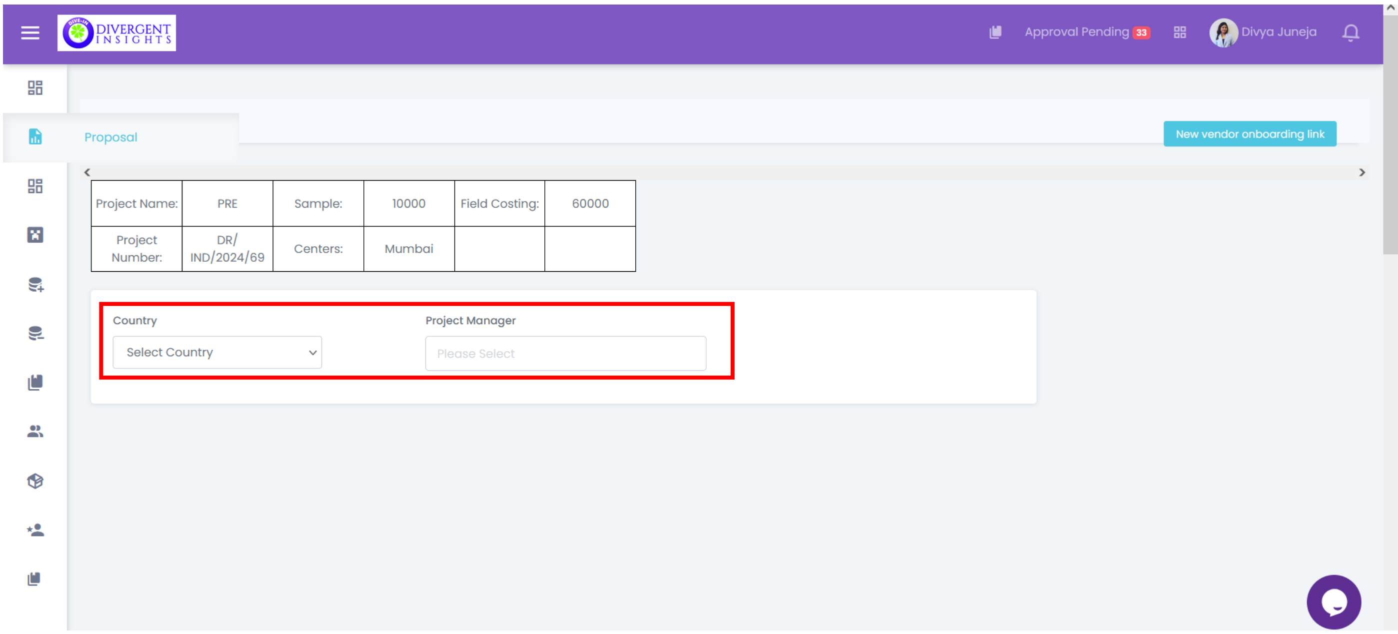


If Budget is not added by admin, following warning will appear:

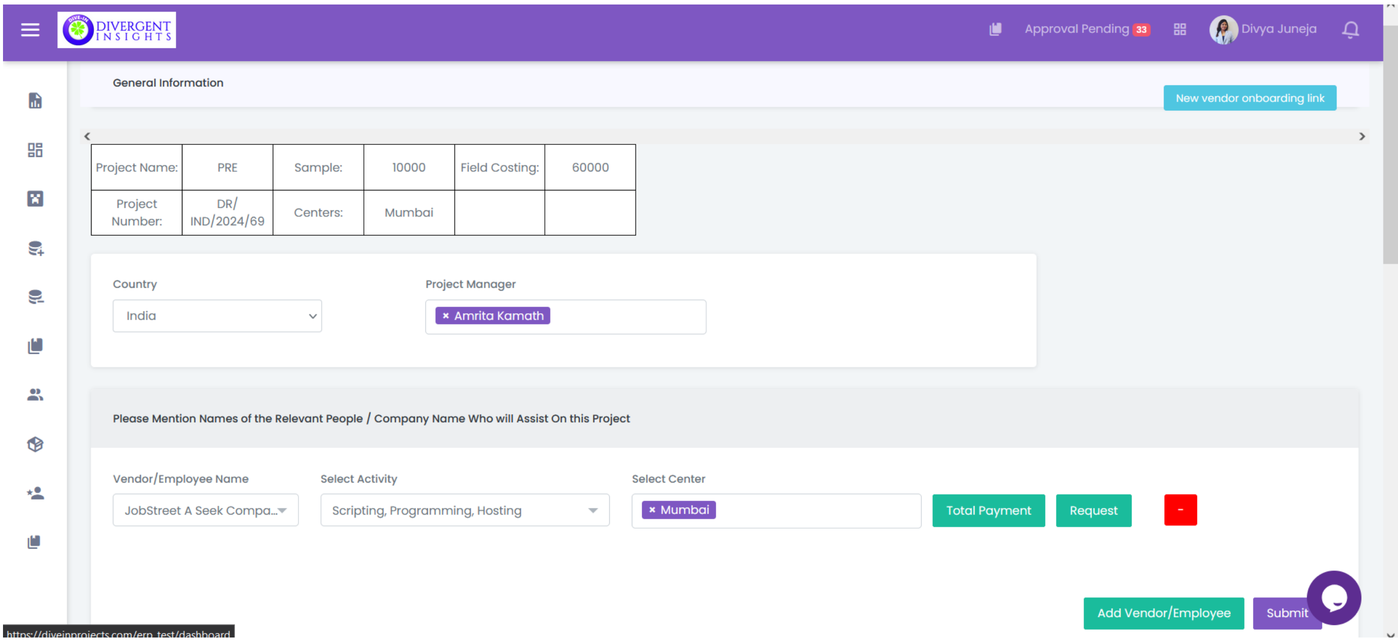


Afte field costing uploaded and Budget added by Admin you can access the Team members for Particular project and continue uploading invoices here.

2. Select Country and Project manager.

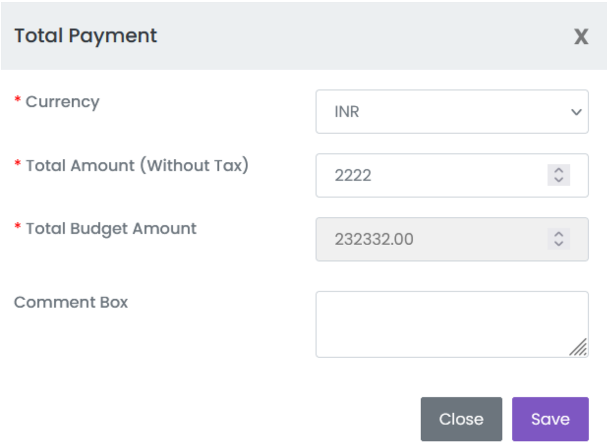


3. Please now select the vendor, activity and center here,



Also, for Multiple Vendors/Employees Click on ‘Add Vendor/Employee’ Button to have multiple Input boxes. Then Submit.

4. After Selecting Vendor/Employee name, Activity and Center then Add Total payment, to do so click on the 'Total Payment' button.

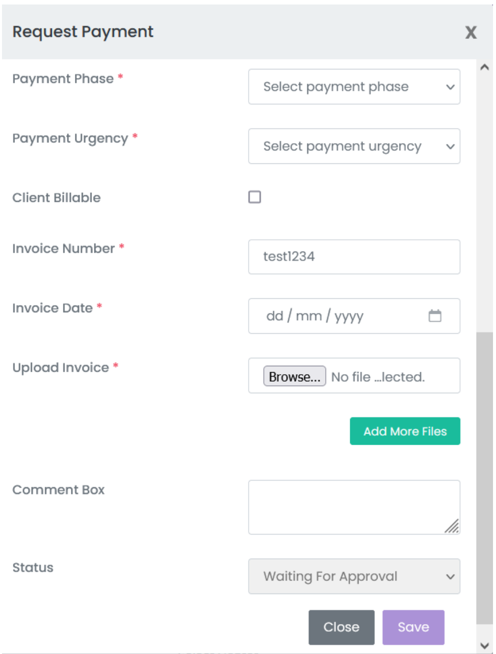


In Total Payment, Select Currency, Amount, Comment.

Total Budget amount Will Be Added by Admin.

Note: after adding 'Total Payment' click on the 'Submit' button present at the last right corner of the page. After submitting you will able to see the request button for that particular vendor and acvitvity.

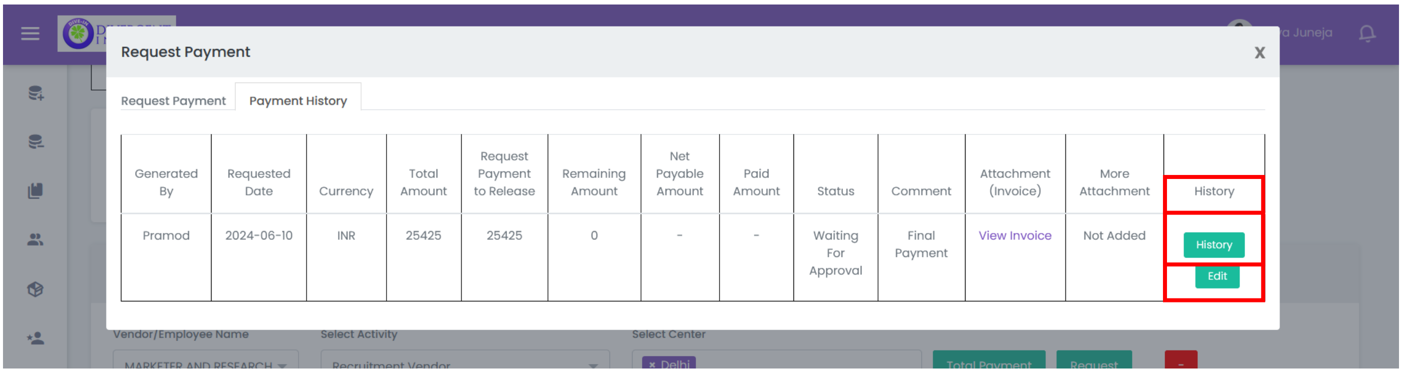
5. To add the request please Click on Request to Fill payment Details



Here you can enter the request amount, upload invoice and fill other details which are required to process that request.
Note: if you have extra documents
with respect to invoice then you can also upload those multiple documents by clicking 'Add More Files' button as shown in above image.

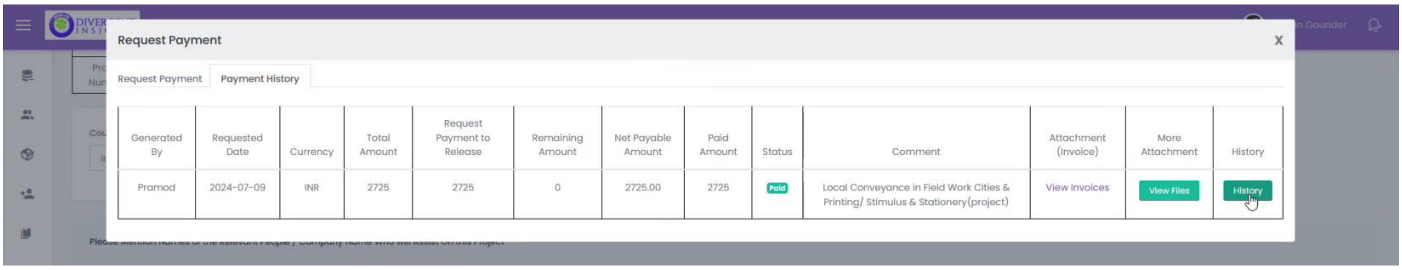
Here BD/PM can add the request payment to release without taxes. Also mentioned invoice number and invoice date and select the invoice. You can add more files by clicking more files then the new row will appear here you can add more attachments.
After entering all data just click on save button. After system will send Mail to BD for Approve that.

6. After adding the request ,You can also View Request History here by clicking on ‘Payment History’ available in the same tab where you are adding request. We can see Multiple Request records here. You can also check history for that particular request.
   And lets say by mistake you have uploaded the wrong request amount, invoice or any other information from the request tab then you can correct the same by clicking on the Edit button.
   Note: this Edit button will be only visible till this request is not approved by Accounts or BD.

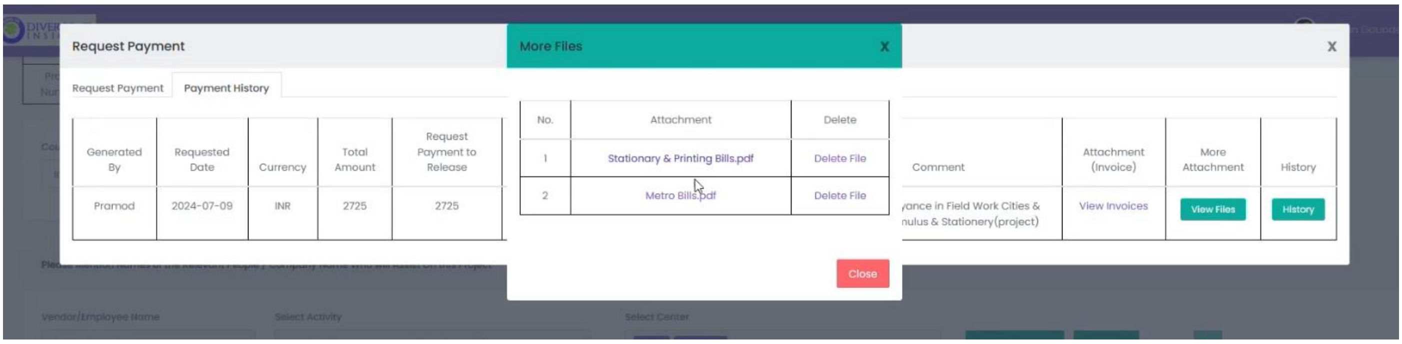


Also, you can Download Uploaded Invoice For that record by clicking View Invoice Link.

After payment, Status will be Paid, You Can view Comments, View Files, And Check History.



If you Click on View Files, you will Get Files Uploaded by the Team Member.



If you Click on History, you will see All records for that Specific payment Request.

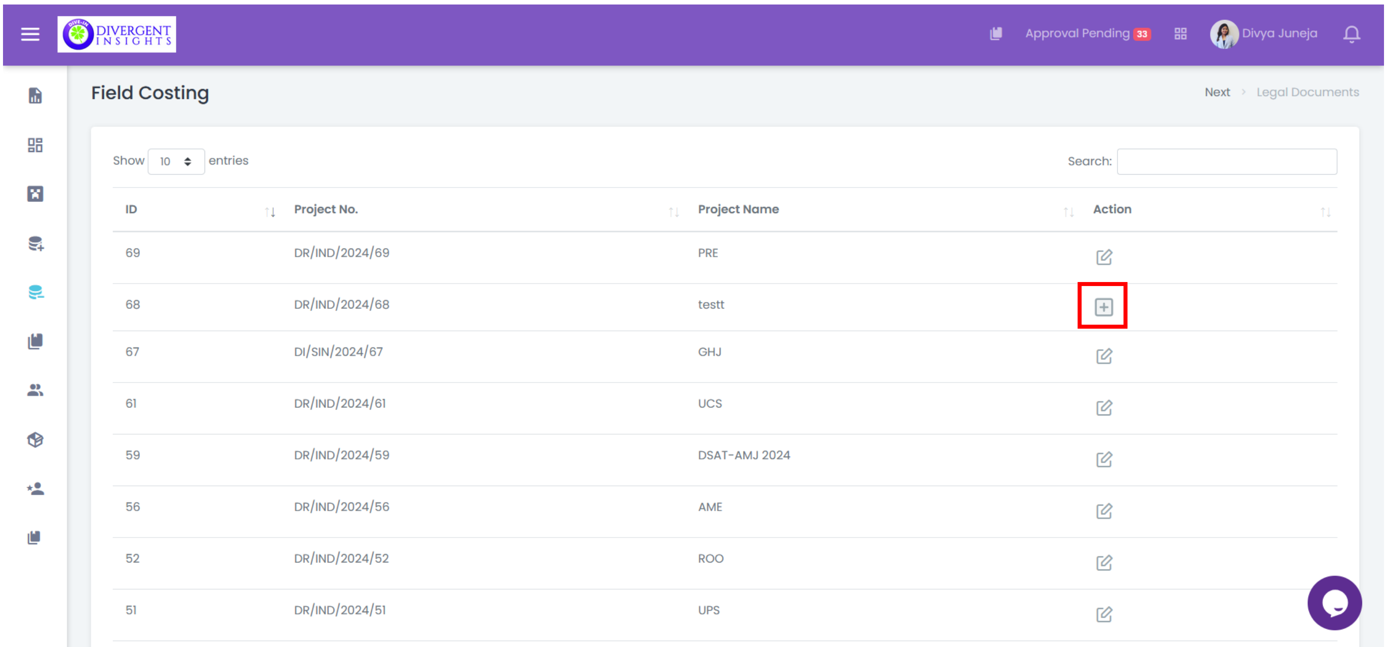
History

No.	Date Time	Department	Staff	Status	Comment
1	09-07-24 10:57 AM	Pramod Sahu	Project Manager	Waiting For Approval From Accounts	Stationary & LC for FGD
2	09-07-24 02:32 PM	Shreya More	Account	Account Approved	Approved
3	10-07-24 03:35 PM	Rajiv Kokane	Business Manager	BD Approved	Approved
4	10-07-24 03:35 PM	Rajiv Kokane	Business Manager	BD Approved	Approved
5	31-07-24 03:22 PM	Shreya More	Account	Paid	Local Conveyance in Field Work Cities & Printing/ Stimulus & Stationery(project)

Close

FIELD COST:

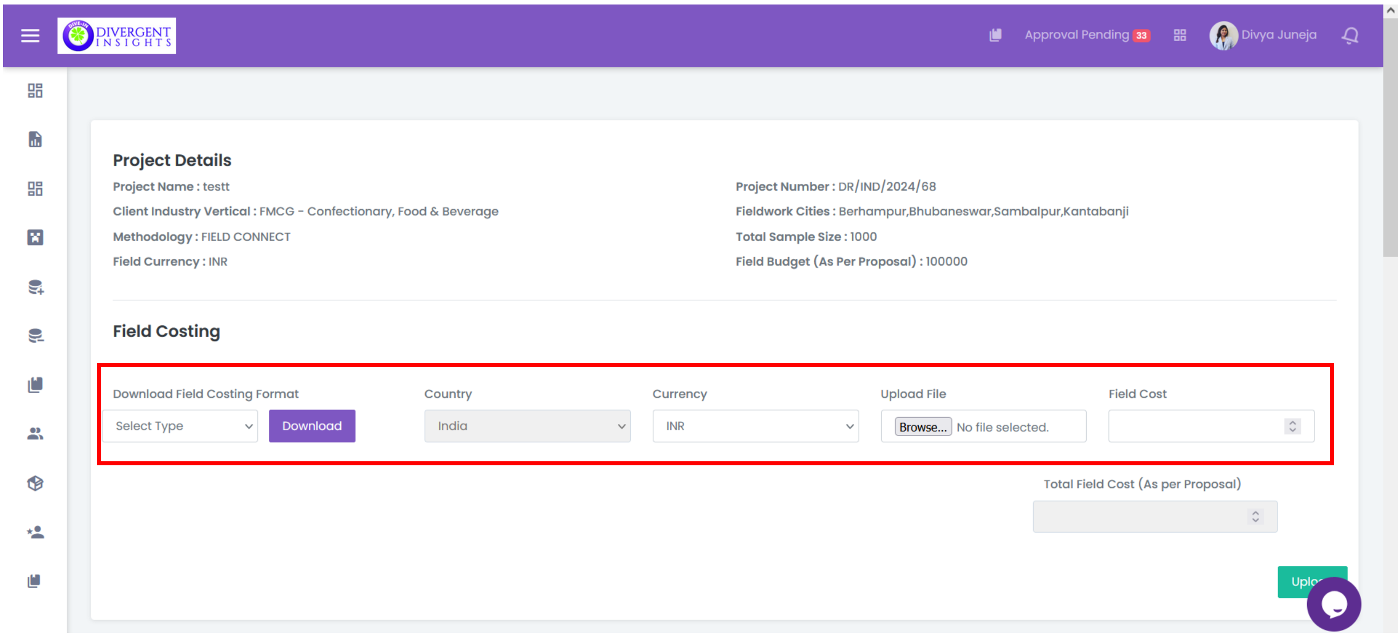
BD can Access Field Cost Module.



To Add Field Costing, Click on Add icon .

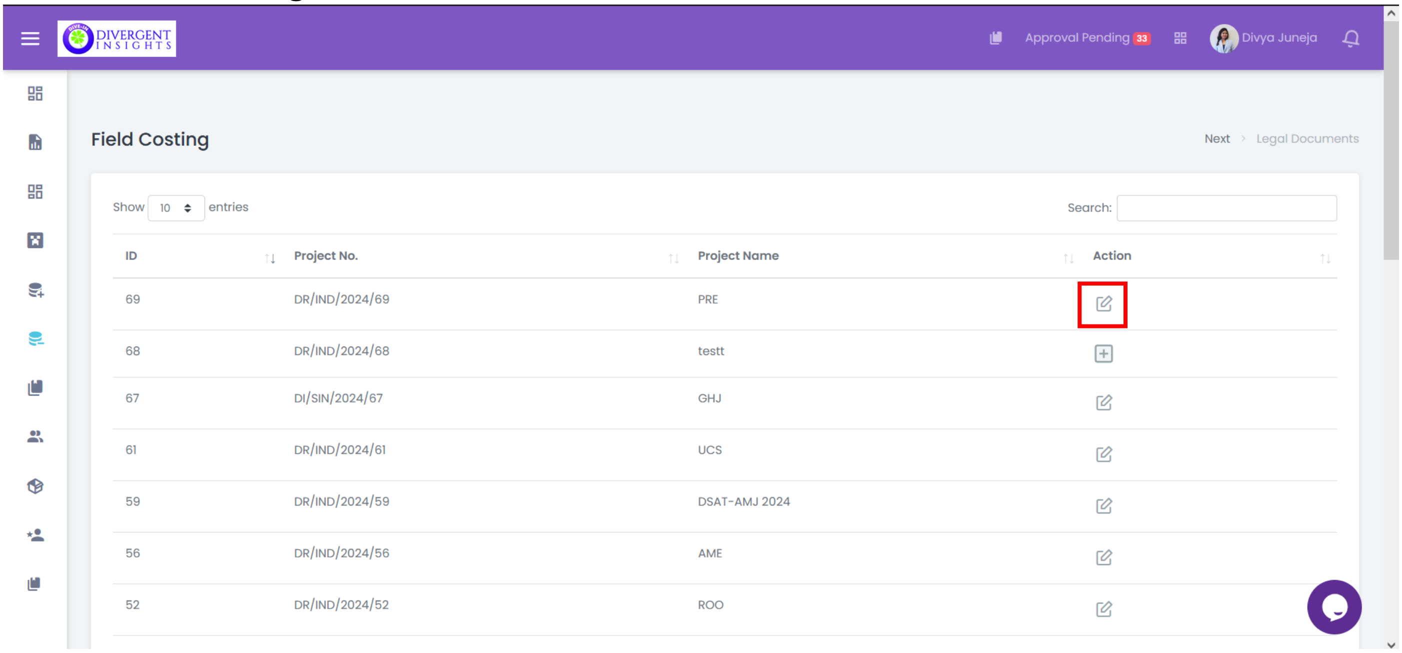
Add Field Budget.

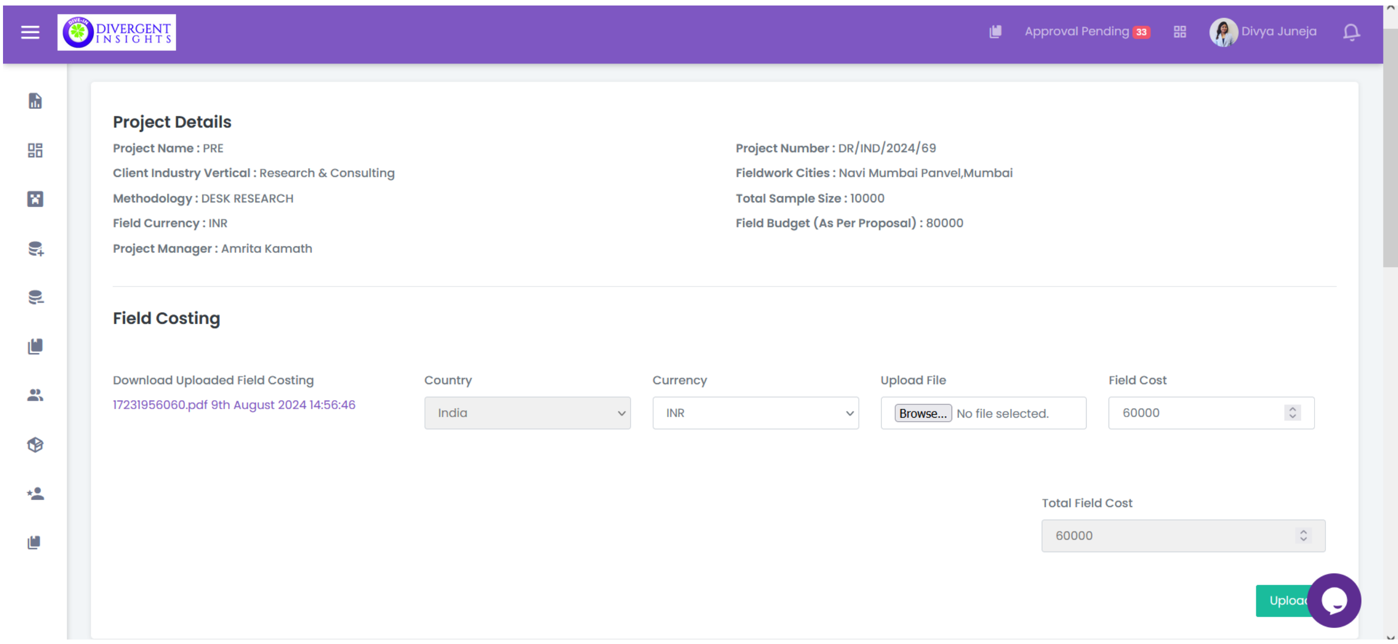
1. You can download Field Costing Format
2. Select Country, currency and Upload File According to country, Add Field Cost.
3. Total Filed Cost will be Automatically Generated.



Conditions: Field Costing should NOT be More than Total Field Cost in Proposal.

To Edit Field Costing, Click on Edit Button .





To Edit field Costing,

1. You Can View Field Costing File Uploaded Earlier.
2. Change/Correct Country/Currency Value.
3. Add/ Upload File if needed and also change Field Cost value

Important:

After Adding Field Costing by BD/PM, Admin Will Add Data in Budget on his side. After that you can Access team Member Module.