

# **USER GUIDE**

## **Business Promotion Software**

### **Version 1.0**

Date	Created By	Revision History
28/12/2021	Shivaji Dalvi	Initial Release V1.0

## Overview

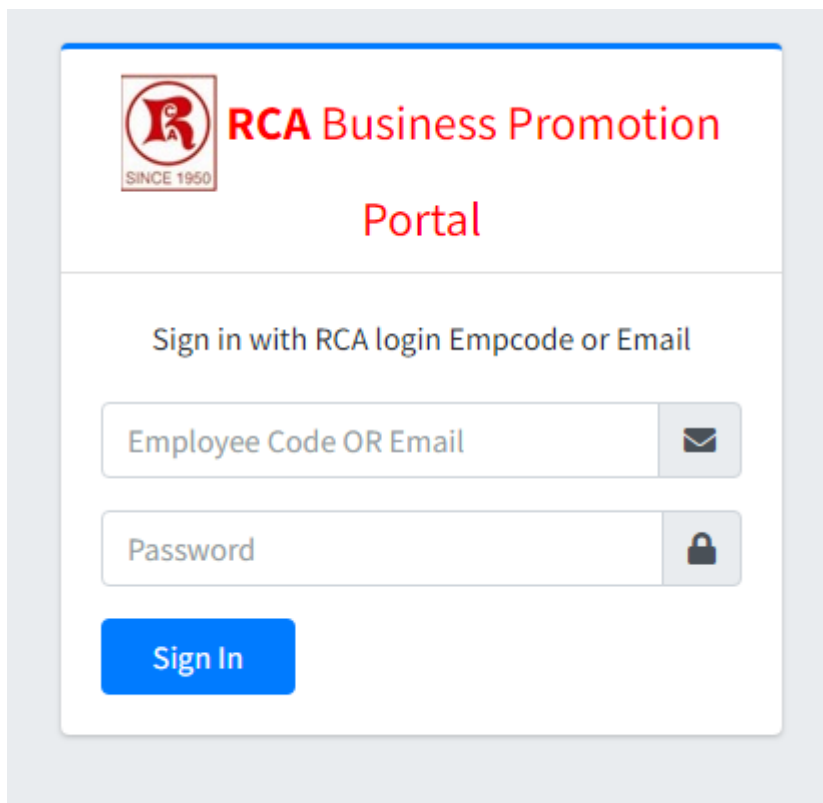
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This software is used to send Company Profile Link of Dr.Amin Controllers PVT.LTD. to other professional clients and companies. At First, Engineer has to Download Sample Template from the Upload Presentation menu. He/She has to fill the data and Upload the presentation in the system. Once presentation is uploaded, software will create presentation link on Dashboard. Engineer can send this link to respective Client.

Following is the Step By Step process to create Company Profile Link and Other Features:

Business Promotion Software Link: <http://rcahrd.in/login/>

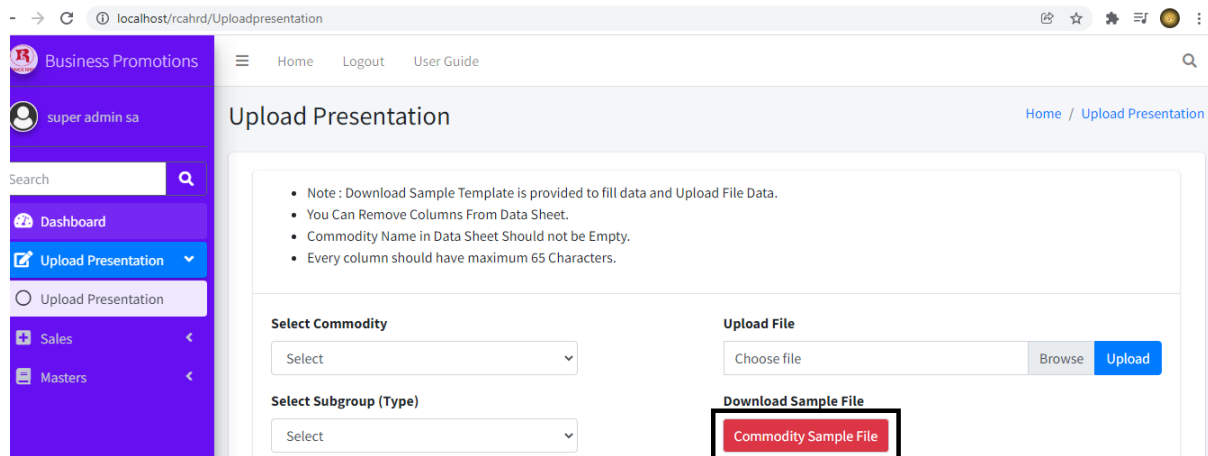
Login:



The screenshot shows the login interface of the RCA Business Promotion Portal. At the top left is the RCA logo with the text 'SINCE 1950'. To its right, the text 'RCA Business Promotion' is displayed in red, followed by 'Portal' in a larger red font. Below this, the instruction 'Sign in with RCA login Empcode or Email' is centered. There are two input fields: the first is labeled 'Employee Code OR Email' and has an envelope icon on its right; the second is labeled 'Password' and has a lock icon on its right. Below these fields is a blue 'Sign In' button.

User has to enter his Employee Code or Email with Password (This will be provided by Administrator) for Login. At First login user or employee will be asked to Change his/her password.

## Upload Presentation



To create Company Profile link, we have to click on Upload Presentation tab.

Above image show Upload presentation screen.

Please click Download Sample File button which will give you Template to fill your Commodity Experience Data.

Please read the notes section before proceeding further.

Then you have to click on Select Commodity dropdown which displays the commodity for which you have to show experience to Client e.g. Line Pipe Experience etc.

Select Subgroup displays Type like ERW Steel Pipe.

Then click Browse Button to upload Filled Commodity Template File with Experience and Click Upload button to submit the data.

After submitting screen will redirect to Dashboard.

## DASHBOARD

Business Promotions

super admin sa

Search

Dashboard

Upload Presentation

Sales

Masters

Welcome To RCA Business Promotion Portal!!!

Home / Dashboard

Business Promotion List

Search:

Commodity ↑↓	Sub Group ↑↓	Link of the file ↑↓	Source file (Export To Excel) ↑↓	Emp Name ↑↓	Entry Date ↑↓	Send Email ↑↓
Hot Rolled Steel	HR Coil	<a href="#">DACPL_Presentation_27122021071150.pdf</a>	<a href="#">commodity_templ ...</a>	super admin sa	27-12-2021	<a href="#">Send Email</a>
Lab	Company Brochure	<a href="#">DACPL_Lab_Presentation_15122021050704.pdf</a>	<a href="#">commodity_templ ...</a>	super admin sa	12-12-2021	<a href="#">Send Email</a>

Dashboard screen displays Link of the file generated after you upload your Experience Commodity Template.

Following are the fields or columns displayed on Dashboard Screen.

Commodity: Here name of the Commodity is displayed e.g. Hot Rolled Steel etc.

Subgroup: Here type of the Commodity is displayed e.g. HR Coil etc.

Link of the file: Here Link of the file generated after you upload your Experience Commodity Template.

Source File: This displays Commodity template file with filled data you have uploaded.

Emp Name: This displays employee or user name who have generate the link.

Entry Date: This displays Date on which link is generated.

Send Email: This button redirects user to Send Email to Client screen.

## SEND Email Screen

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Search

Dashboard

Upload Presentation

Sales

Masters

Send Email

Home / Dashboard

Send Email

Presentation Link

[http://rcahrd.in/files/DACPL\\_Presentation\\_21122021051409.pdf](http://rcahrd.in/files/DACPL_Presentation_21122021051409.pdf)

Company Name

Email

Submit

\*\*\*Note: Please mark our Email Sent as not SPAM.

Dr Amin Controllers Pvt. Ltd

Send Email screen allow you to send Email to your Client or Company with the Company Profile Link.

This screen also displays QRcode for the Company Profile Link you have generated. This can be useful if you have to send Company Profile by Whatsapp etc.

Following are the fields of this screen:

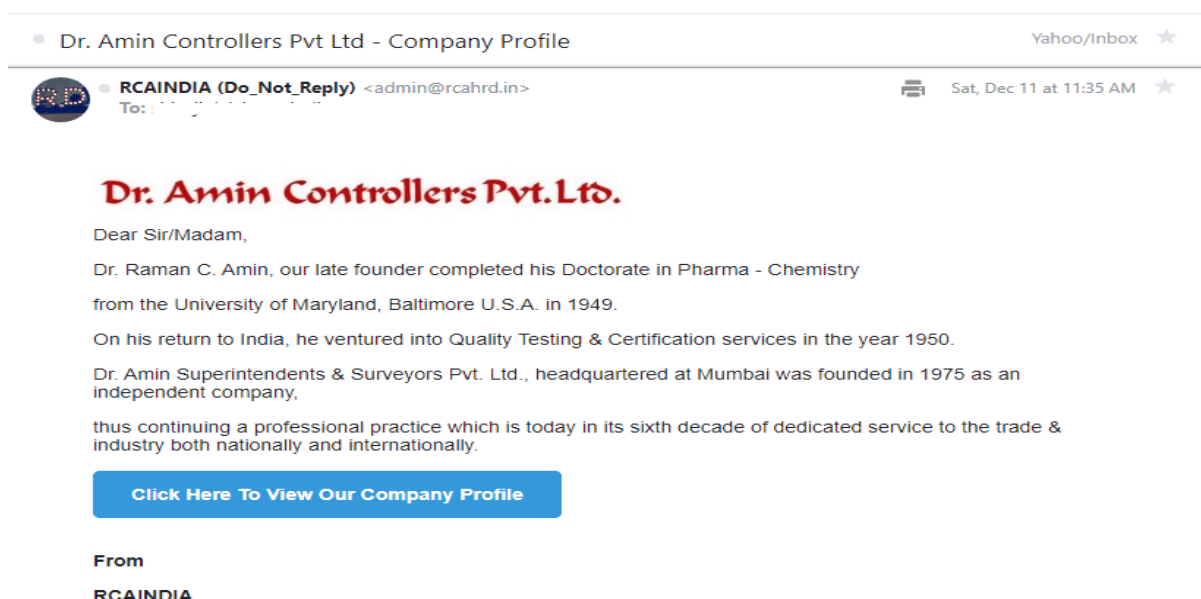
Presentation Link: This is the file generated with the Experience data you have filled.

Company Name: Here you have to fill Company Name or Client Name to whom you are sending the file.

Email : Here you have to fill Email address of Company or Client.

QRCode: This displays QRcode for the Company Profile Link you have generated. This can be useful if you have to send Company Profile by Whatsapp etc.

Following is Email Sent to Client:



## MASTERS:: User Master

Id	Name	Emp Code	Email	Type	Entry Date	Status	Edit
1	super admin sa	123456	admin@rcahrd.in	Admin	27-10-2021	Active	<button>Edit</button>
2	Shivaji Dalvi	5891	shivaji.dalvi@rcaindia.com	Office Staff	28-10-2021	Active	<button>Edit</button>

Here User list is displayed who have access and login into system.

Add User button will display a screen to Add user who can access and login into system.

Edit button will display a screen to edit already existed User details.

### Add User Screen :

Add User

First Name

Middle Name

Last Name

Email Address

Emp Code

Type

Confirm Password

Submit

Here you can add User who will have access to login in the system. Type field provides access to Admin who have full access to the system. Office staff and Custom have limited access to the system.

## Edit User Master

super admin sa

Search

Dashboard

Upload Presentation

Sales

Masters

User Master

Commodity Master

SubGroup Master

Edit User

Home / User Master

Edit User

Emp First Name

super admin

Emp Middle Name

Emp Last Name

sa

Email Address

admin@rcahrd.in

Emp Code

123456

User Type

Admin

Office Staff

Admin

Custom

Submit

This screen allows user to make changes to already existed User details as per fields provided.

7

## Commodity Master:

The screenshot shows the 'View Commodity Master' interface. On the left is a purple sidebar with the 'Business Promotions' logo and user 'super admin sa'. The sidebar menu includes 'Dashboard', 'Upload Presentation', 'Sales', 'Masters' (selected), 'User Master', and 'Commodity Master'. The main content area has a header with 'Home' and 'Logout' links, and a search icon. Below the header, the title 'View Commodity Master' is displayed with a breadcrumb 'Home / Reports'. A search bar and a '+ Add Commodity' button are at the top right. The main area contains a table with three rows of commodity data.

Sr.No.	Commodity Name	Status	Edit
1	Pipes	Active	<button>Edit</button>
2	Valves	Active	<button>Edit</button>
3	Technical	Active	<button>Edit</button>

View commodity screen displays list of commodities added for which Experience has to show.

Add Commodity button will display commodities to add for which Experience has to show.

Edit Commodity button will display changes to already exist.

## Add Commodity :

The screenshot shows the 'Add Commodity' interface. The sidebar is identical to the previous screen. The main content area has a header with 'Home' and 'Logout' links, and a search icon. Below the header, the title 'Add Commodity' is displayed with a breadcrumb 'Home / Commodity Master'. A search bar is at the top right. The main area contains a form with a label 'Add Commodity' and a text input field for 'Commodity Name'. A blue 'Submit' button is located below the input field.

Here you have add for which Experience has to show e.g. Line Pipe Experience.



## Edit Commodity:

The screenshot shows a web application interface for editing a commodity. On the left is a purple sidebar with the following elements: a logo and 'Business Promotions' text, a user profile for 'super admin sa', a search bar, and a menu with items: Dashboard, Upload Presentation, Sales, Masters (expanded), User Master, Commodity Master (selected), and SubGroup Master. The main content area has a top navigation bar with 'Home' and 'Logout' links. Below this, the page title 'Edit Commodity' is displayed next to a breadcrumb trail 'Home / Commodity Master'. The central form is titled 'Edit Commodity' and contains a label 'Commodity Name' above a text input field containing 'Line Pipe Experience'. A blue 'Submit' button is located below the input field.

Here you have edit already existed Commodity for which Experience has to show e.g. Line Pipe Experience.

## SubGroup Master

Sr.No.	Commodity	Sub Group Name	Status	Edit
1	Pipes	ERW Steel Pipe	Active	<a href="#">Edit</a>
2	Pipes	LSAW	Active	<a href="#">Edit</a>
3	Pipes	HSAW	Active	<a href="#">Edit</a>
4	Pipes	SEAMLESS	Active	<a href="#">Edit</a>
5	Technical	Company Brochure	Active	<a href="#">Edit</a>

View Subgroup Master Screen list of subgroups or types added.

Add Subgroup button allows user to add subgroups or types to add.

Edit button allows to edit subgroups or types already added.

## Add Subgroup

Business Promotions

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Search

Dashboard

Upload Presentation

Sales

Masters

User Master

Commodity Master

SubGroup Master

Home Logout

Home / Sub Group Master

Add Sub Group

Sub Group Name

Commodity

Line Pipe Experience

Select

Pipes

Valves

Technical

Lab

Line Pipe Experience

Hot Rolled Steel

Submit

Here user can new subgroups or types to add. Select Commodity from Dropdown e.g. Line Pipe Experience.

## Edit Subgroup:

The screenshot shows a web application interface for editing a subgroup. On the left is a purple sidebar with the 'Business Promotions' logo and a user profile 'super admin sa'. The sidebar contains a search bar and a menu with items: Dashboard, Upload Presentation, Sales, Masters (selected), User Master, Commodity Master, and SubGroup Master. The main content area has a header with 'Home' and 'Logout' links. The title 'Edit Sub Group' is displayed. The form itself has two sections: 'Sub Group Name' with a text input containing 'ERW Steel Pipe' and a 'Submit' button; and 'Sub Group Short Name' with a dropdown menu. The dropdown is open, showing options: 'Select', 'Pipes', 'Valves', 'Technical', 'Lab', 'Line Pipe Experience' (highlighted in blue), and 'Hot Rolled Steel'. A breadcrumb trail 'Home / Sub Group Master' is visible in the top right.

Business Promotions

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Search

Dashboard

Upload Presentation

Sales

Masters

User Master

Commodity Master

SubGroup Master

Home Logout

### Edit Sub Group

Home / Sub Group Master

Edit Sub Group

**Sub Group Name**

ERW Steel Pipe

Submit

**Sub Group Short Name**

Line Pipe Experience

Select

Pipes

Valves

Technical

Lab

Line Pipe Experience

Hot Rolled Steel

Here user can edit subgroups or types already existed. Select Commodity from Dropdown e.g. Line Pipe Experience.

## Sales: Schedule Meeting

Welcome To RCA Business Promotion Portal!!!

Home / Dashboard

Schedule Meeting With Client List

+ Add New Schedule

Search:

Sr.No.	Client Name	Purpose Of Meeting	Client Email	Contact Number	Office Address	Meeting Date and Time
1	Cidco	Inspection of Technical Things	cidco@gmail.com	9820123213	Belapur, Maharashtra	15-12-2021 2:00 PM
2	DACPL	test	ss@ss.com	9820123213	Empire State	15-12-2021 4:00 PM
3	123greetings	test	test@test.com	43434344	2/60, G CHS	01-12-2021 3:35 PM

This screen displays list of Meetings Scheduled in the system.

Add New Schedule button displays screen to add new schedule.

### Add New Schedule:

Add Meeting Schedule With Client

Home / View Meeting Schedule

Add New Meeting Schedule With Client (Sends Internal Notification)

Your Email: admin@rcahrd.in

Company Name\*

Client Email

Purpose of Meeting\*

Client contact number\*

Office Address\*

Meeting Date\*

Meeting Time\*

Submit

In this screen User can mention when he has scheduled meeting with Client. After filling all the fields in screen Email is sent to the Supervisor which notifies about meeting scheduled.

Following is the format of Email sent to your Supervisor to note.



● **RCAINDIA (Do\_Not\_Reply)** <admin@rcahrd.in>



Sat, Dec 11 at 12:54 PM ★

To:

Dear User,

Meeting has been scheduled – please find the details below :

Company Name	Client Email	Purpose	Schedule Date	Schedule Time
Cidco	cidco@gmail.com	Inspection of Technical Things	15-12-2021	2:00 PM

From,

Admin

**NOTE: This is a system generated mail. Please do not reply**



## Sale :: Client Interaction

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Search

Dashboard

Upload Presentation

Sales

Schedule A Meeting

Client Interaction

Masters

Home Logout

Welcome To RCA Business Promotion Portal!!!

Home / Dashboard

Client Interaction List

+ Add New + Add To Existing

From Interaction Date To Interaction Date

Client Name Employee Name

Select... Select...

From Followup Date To Followup Date

Submit Export To Excel Export Followup Data

Search:

Sr.No.	Client Name	Purpose Of Meeting	Summary Of Items Discussed	Purpose Of Meeting Achieved	Summary Of Action Points	Interaction Date	Employee Name	View	Edit
1	Test Entry Pvt Ltd	Getting new business order...	Information of the products and inspection process...	Yes...	Testing...	23-11-2021	super admin sa	View	Edit
2	Agrocorp International Pte. Ltd.	Cotton and Cashew Nut business...	Recently Deepak Agarwal has left Agrocorp. For all	Partly...	Follow up on Raw cotton data of Vietnam and Indonesia	15-11-2021	super admin sa	View	Edit

This screen displays the list of Client Interaction done by User or Employee after he has scheduled meeting with Client.

There are filters provided where you can search Client Interaction happened by Employee Name, Client Name etc.

Add New button will redirect user to add Interaction for New Client.

Add To Existing button will redirect user to screen where Client is already existed in the system.

## New Client Interaction Form

The screenshot shows the 'New Client Interaction Form' interface. On the left is a purple sidebar with the 'Business Promotions' logo and user 'super admin sa'. The sidebar contains a search bar and navigation links: Dashboard, Upload Presentation, Sales (highlighted), Schedule A Meeting, Client Interaction, and Masters. The main content area has a header with the form title and a breadcrumb 'Home / View Interaction List'. Below the header is a 'Client Details' section with the following fields: 'Company\*' (text input), 'Job Title' (text input), 'Name\*' (text input), 'Office Address\*' (text input), 'Country\*' (dropdown menu showing 'Select Country'), 'State\*' (dropdown menu showing 'Select State'), 'City\*' (dropdown menu showing 'Select City'), and 'Office Number\*' (a split input field for 'Country Code' and 'Office Number').

This screen allows user to enter New Client Interaction details. Here user has to fill Company / Client details for which Client Interaction happened. User has to also fill up Interaction Details, Summary of Items Discussed and Client Follow-up Details.

## Client Interaction Form For Existing Clients:

The screenshot shows the 'Client Interaction Form For Existing Clients' interface. The sidebar is identical to the previous form. The main content area has a header with the form title and a breadcrumb 'Home / View Interaction List'. Below the header is a 'Client Details' section. The 'Company\*' field is a dropdown menu that is open, showing a list of existing clients: '123greetings', 'ABCD', 'Agrocorp International Pte. Ltd.', 'Cidco', 'DACPL', 'Prashant Test', 'Sagar Test', and 'Test Entry Pvt Ltd'. The 'Job Title' field is a text input. The 'Office Address\*' field is a text input. The 'State\*' field is a dropdown menu showing 'Select State'. The 'Office Number\*' field is partially visible at the bottom.

This screen allows user to enter Existing Client Interaction details. Here user has to fill Company / Client details for which Client Interaction happened. User has to also fill up Interaction Details, Summary of Items Discussed and Client Follow-up Details.