USER GUIDE

Business Promotion Software

Version 1.0

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

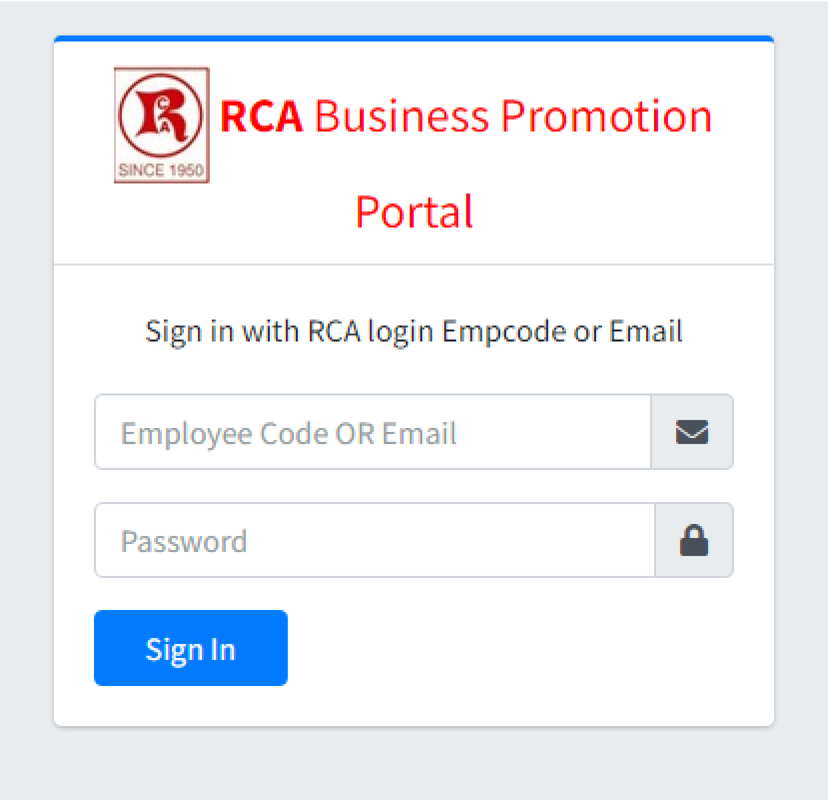
Overview

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:

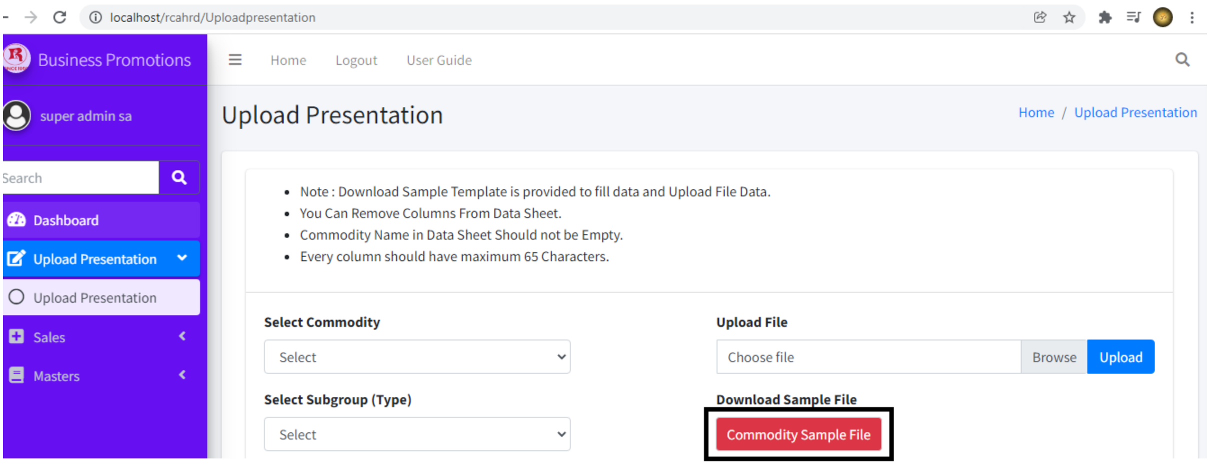
Business Promotion Software Link: http://rcahrd.in/login/

Login:



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.

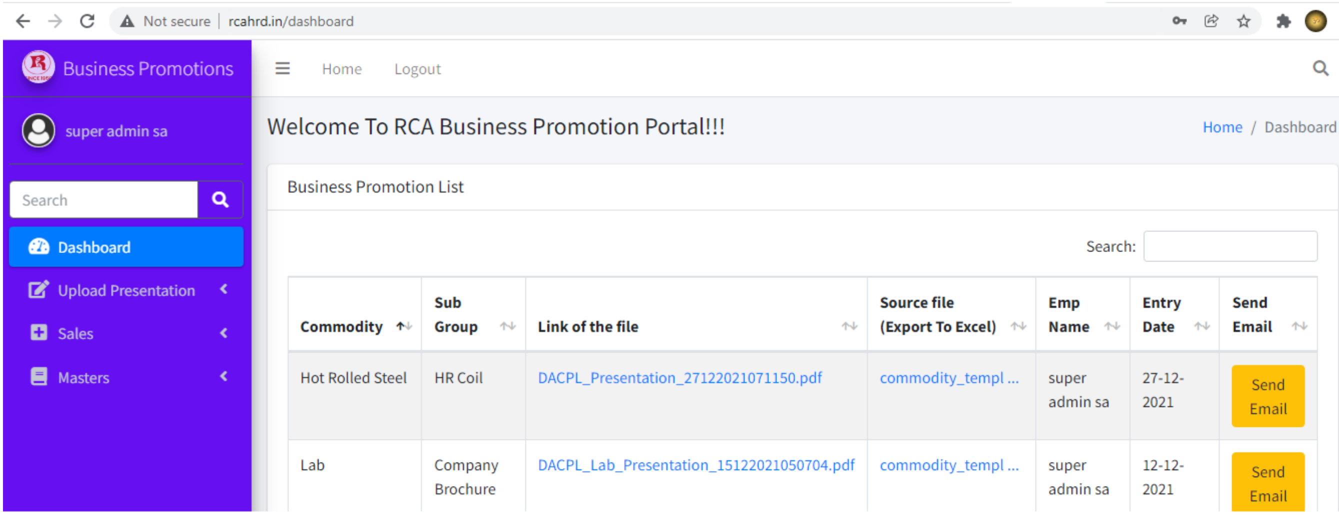
Then you have to click on Select Commodity dropdown which displays the commodity for which you have to show experience to Client e.g. Line Pipe Experience etc.

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



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.

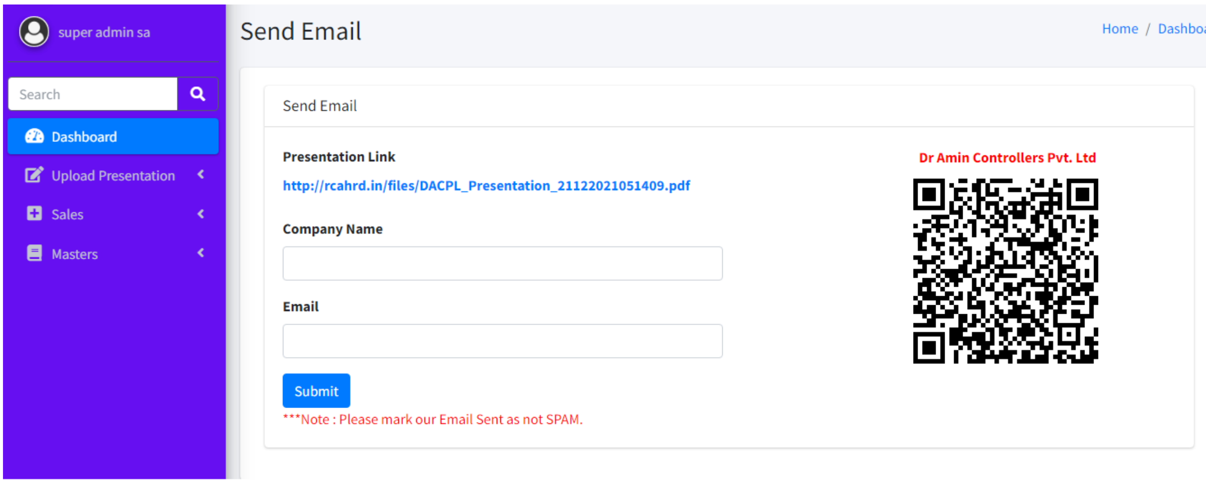
Source File: This displays Commodity template file with filled data you have uploaded.

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



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.

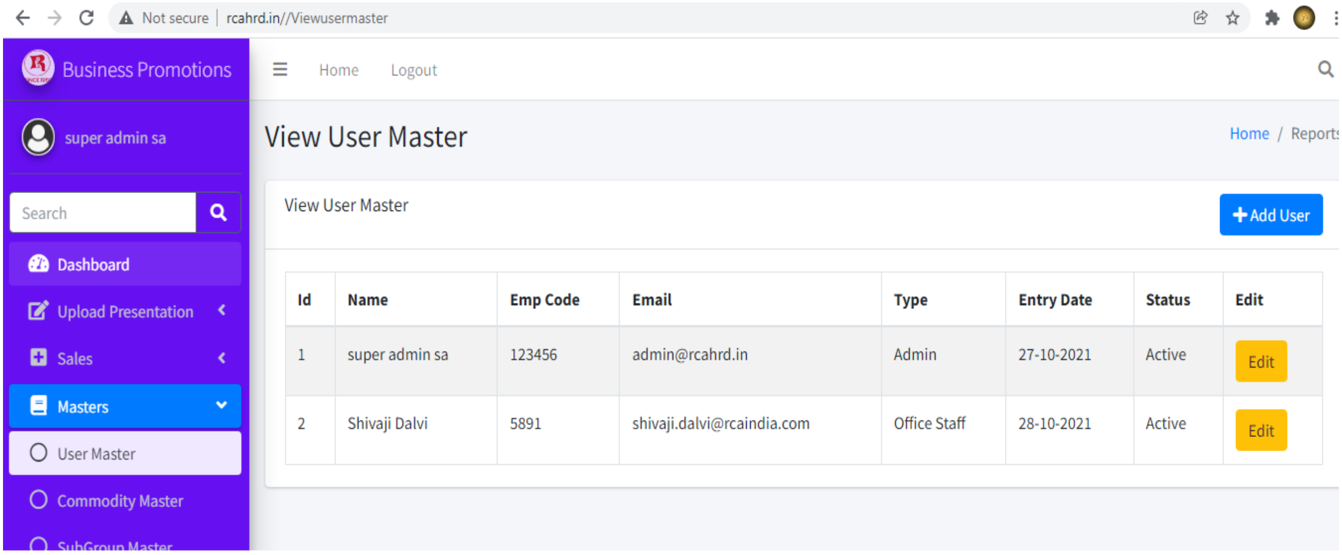
Company Name: Here you have to fill Company Name or Client Name to whom you are sending the file.

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

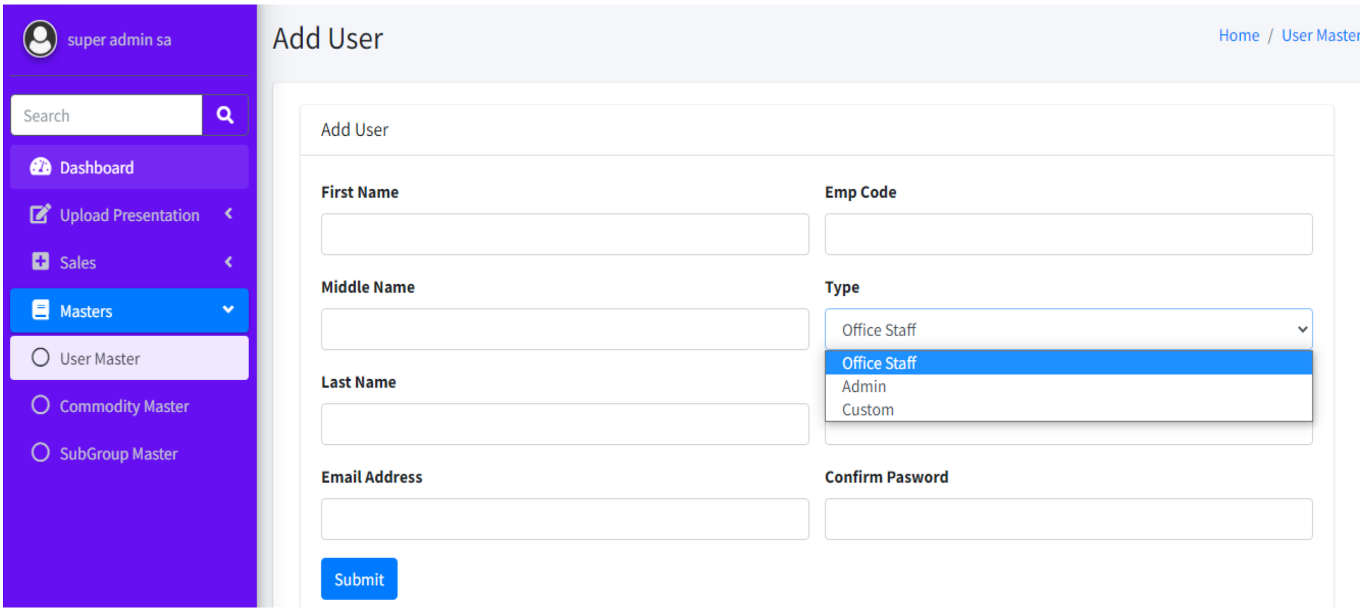


Here User list is displayed who have access and login into system.

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

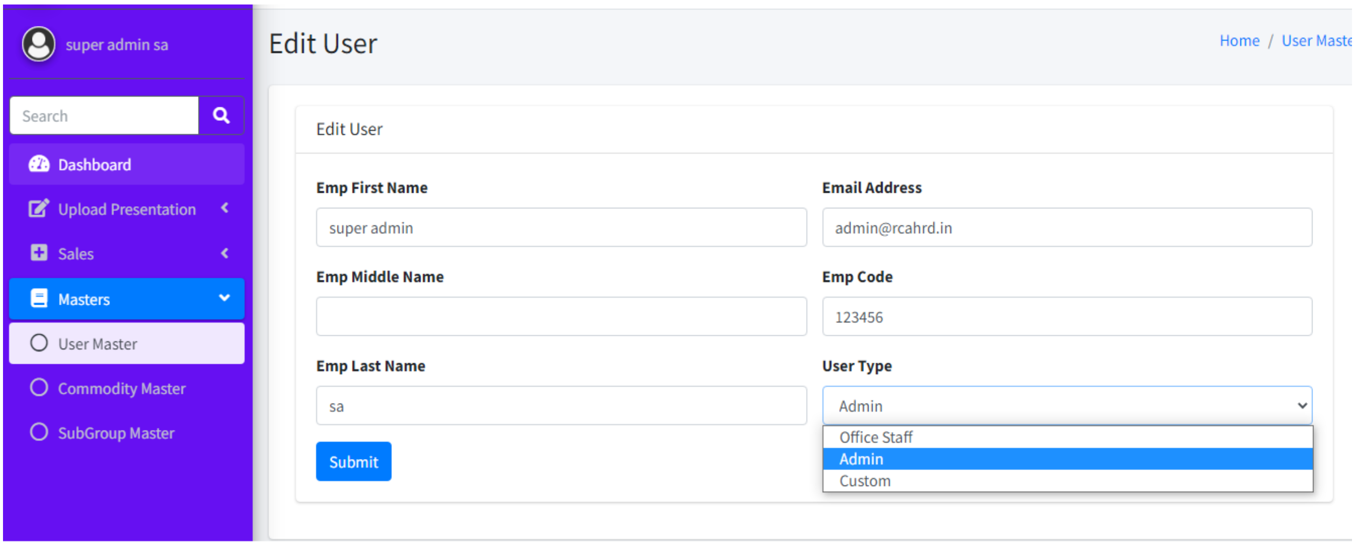
Edit button will display a screen to edit already existed User details.

Add User Screen :



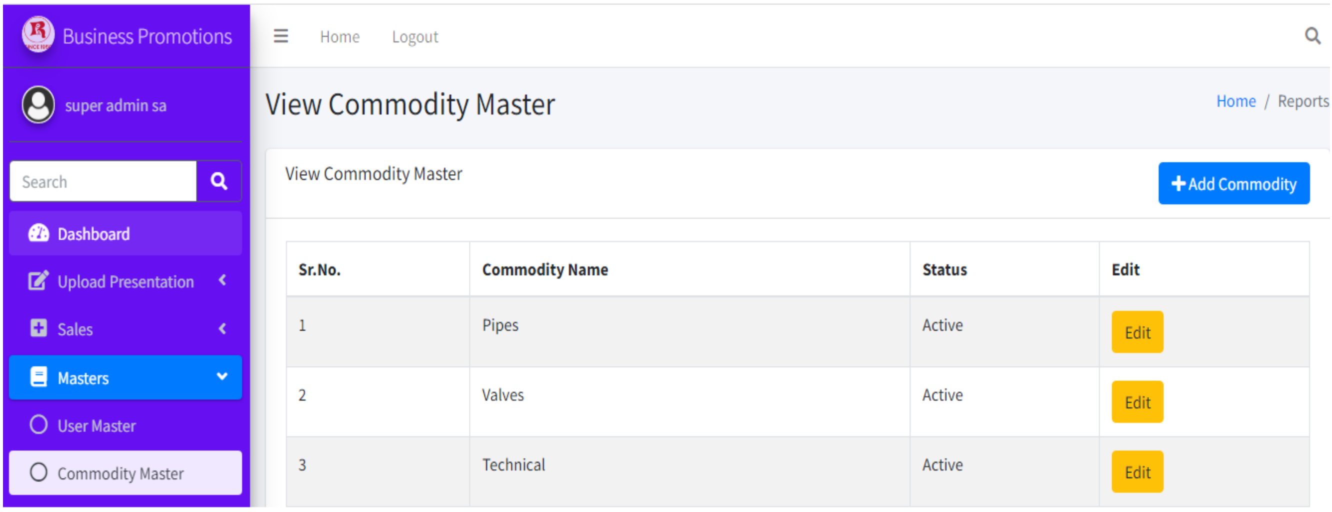
Here you can add User who will have access to login in the system. Type field provides access to Admin who have full access to the system. Office staff and Custom have limited access to the system.

Edit User Master



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

Commodity Master:

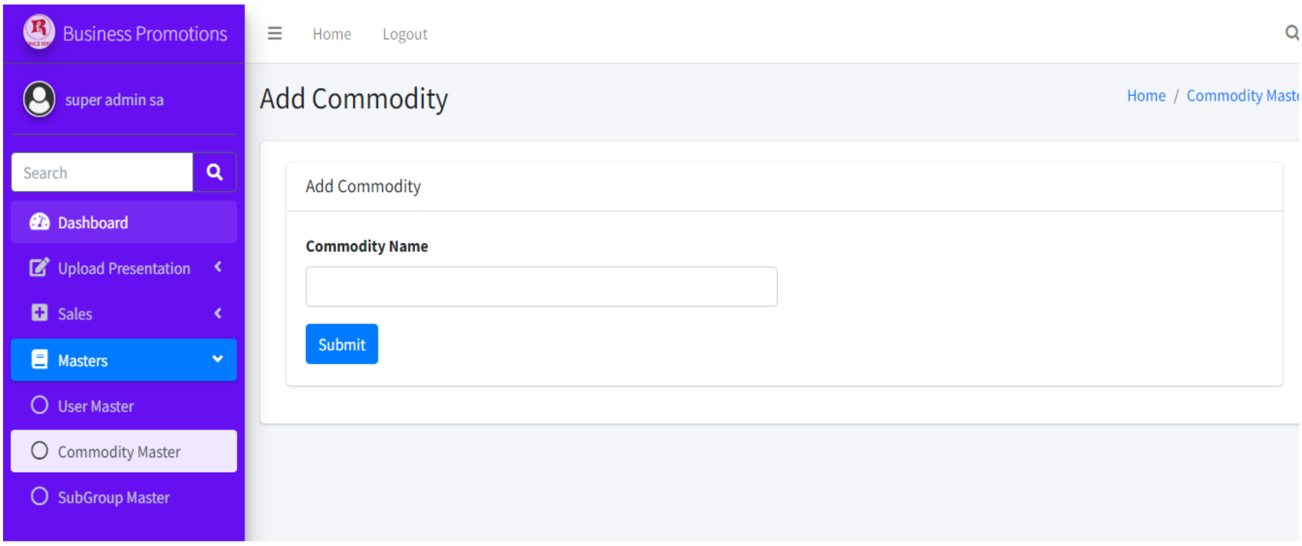


View commodity screen displays list of commodities added for which Experience has to show.

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

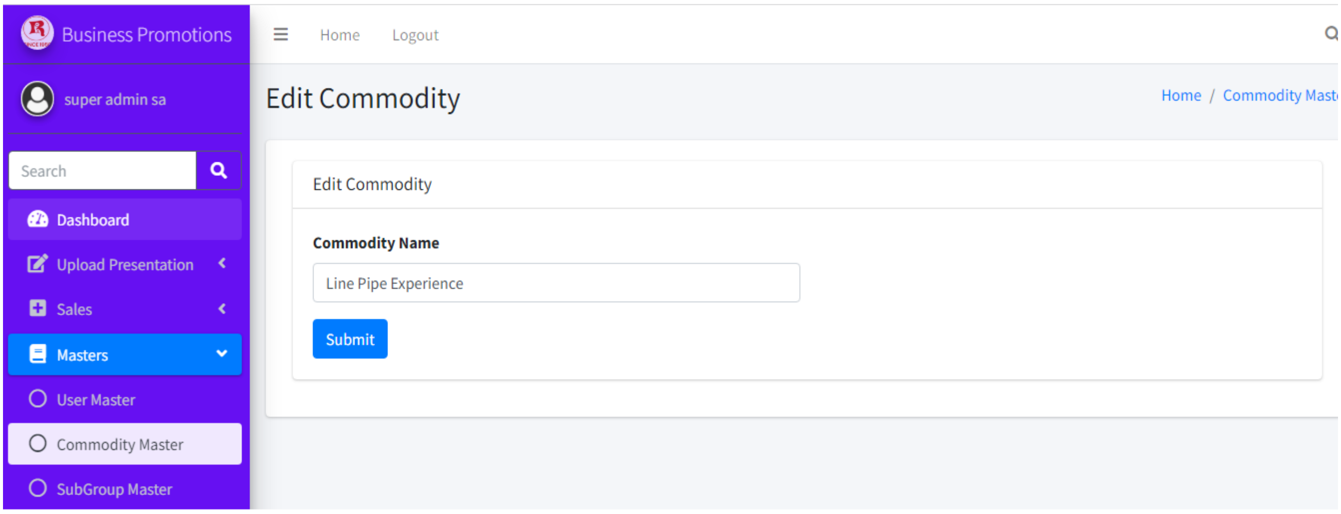
Edit Commodity button will display changes to already exist.

Add Commodity :



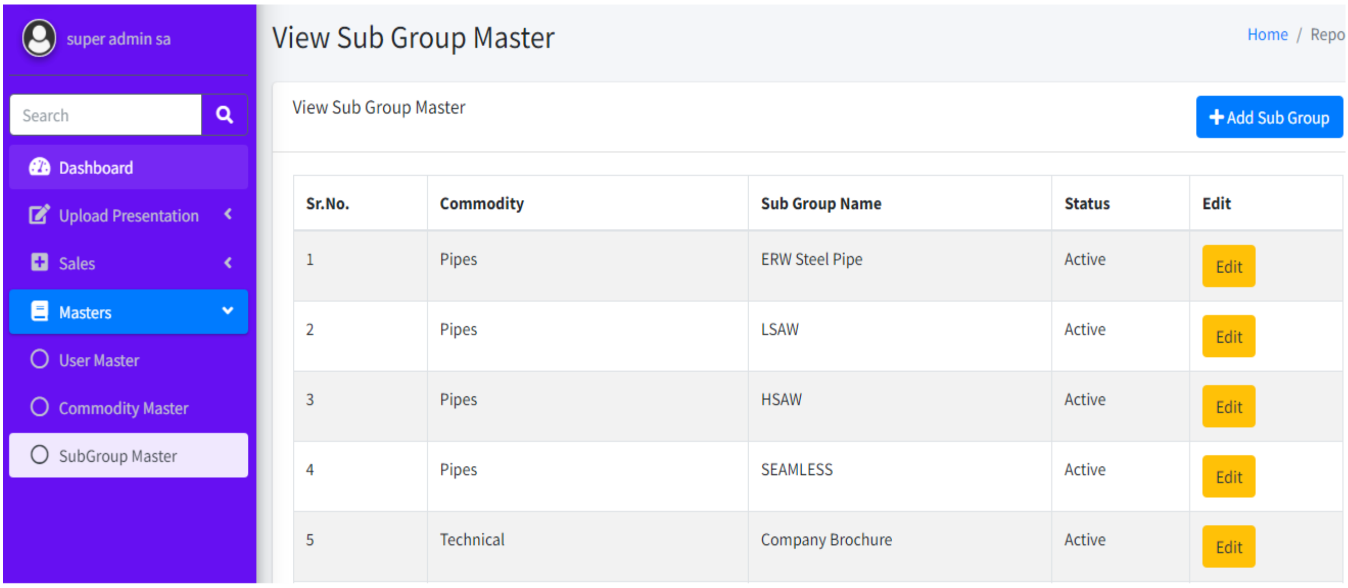
Here you have add for which Experience has to show e.g. Line Pipe Experience.

Edit Commodity:



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

SubGroup Master

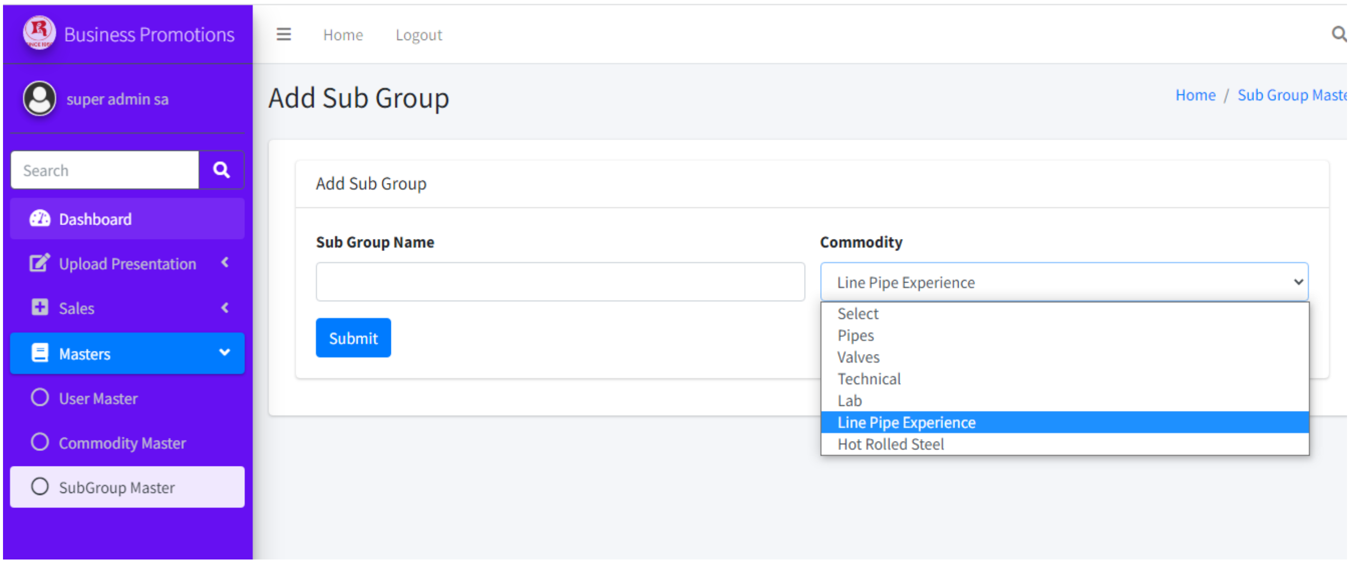


View Subgroup Master Screen list of subgroups or types added.

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

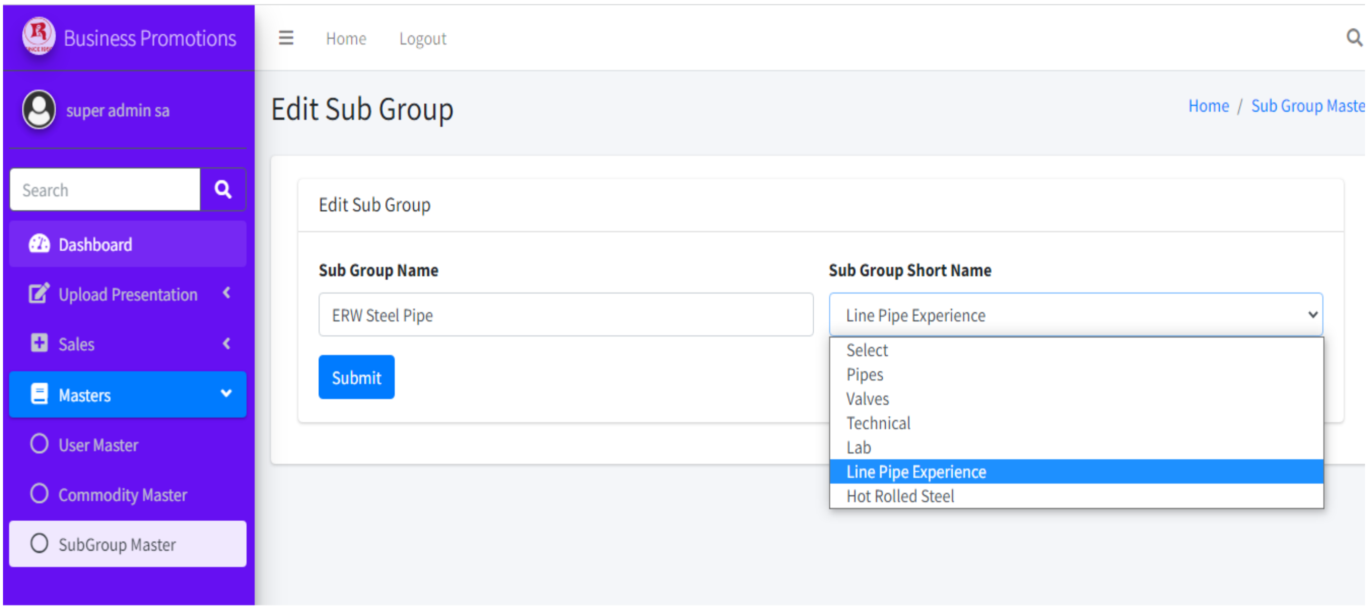
Edit button allows to edit subgroups or types already added.

Add Subgroup



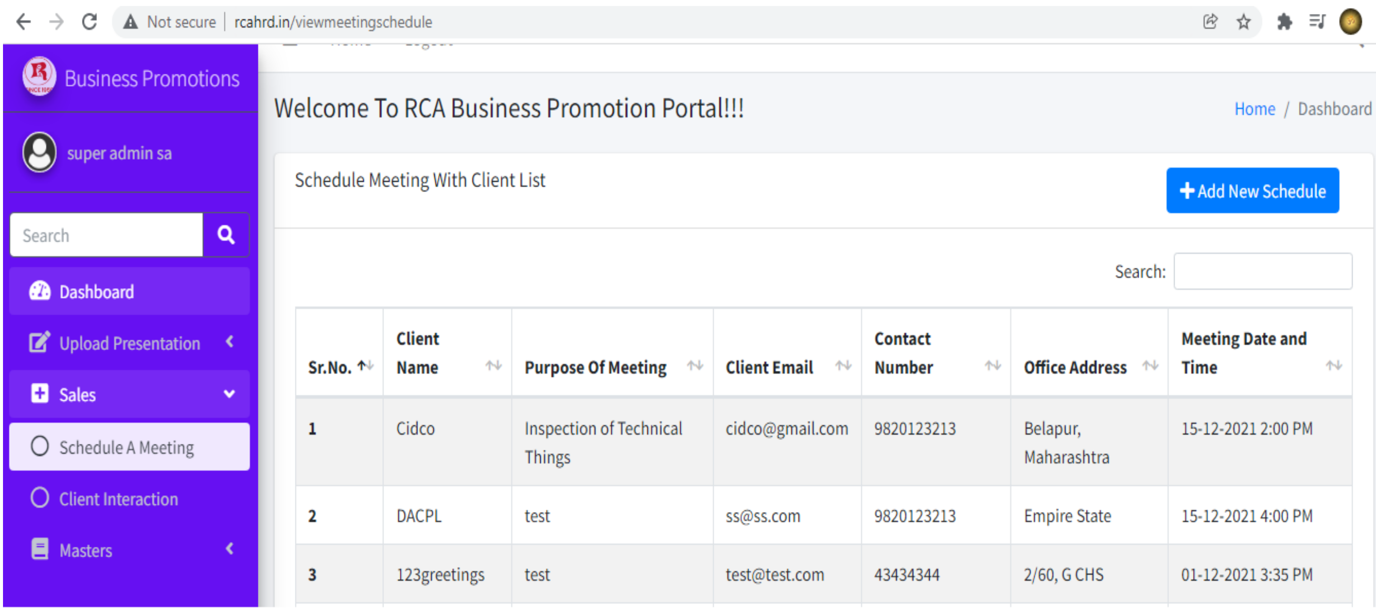
Here user can new subgroups or types to add. Select Commodity from Dropdown e.g. Line Pipe Experience.

Edit Subgroup:



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

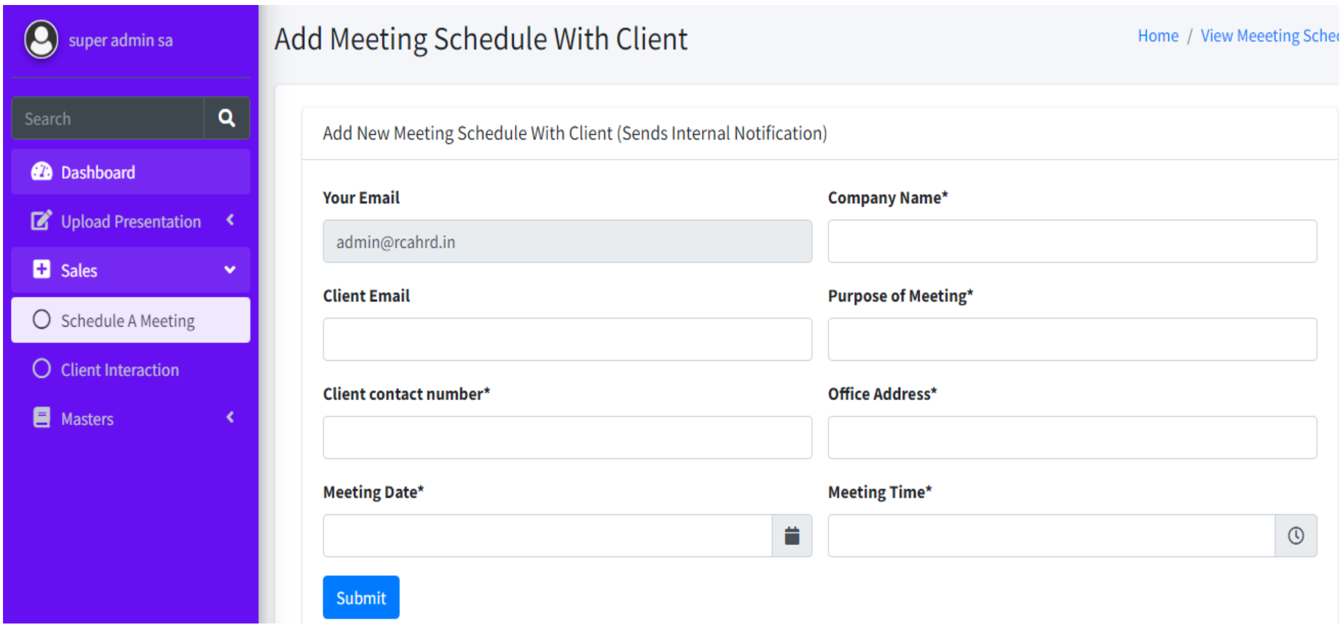
Sales: Schedule Meeting



This screen displays list of Meetings Scheduled in the system.

Add New Schedule button displays screen to add new schedule.

Add New Schedule:



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.

Meeting Scheduled By admin@rcahrd.in

Yahoo/Inbox

RCAINDIA (Do_Not_Reply) <admin@rcahrd.in>

To:

Sat, Dec 11 at 12:54 PM

Dear User,

Meeting has been scheduled – please find the details below :

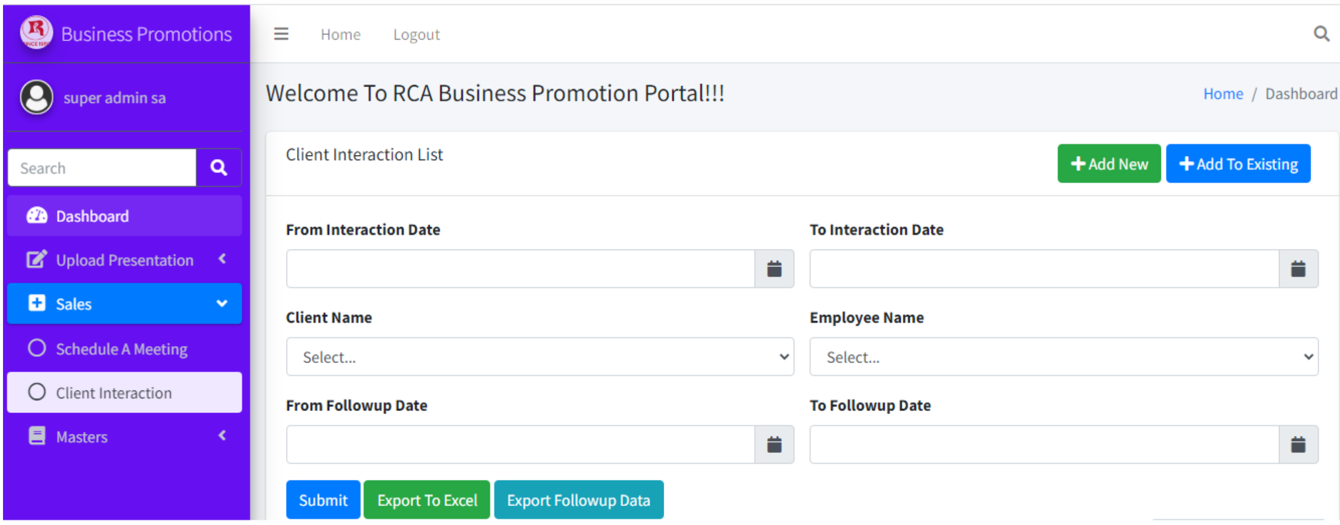
Company Name	Client Email	Purpose	Schedule Date	Schedule Time
Cidco	cidco@gmail.com	Inspection of Technical Things	15-12-2021	2:00 PM

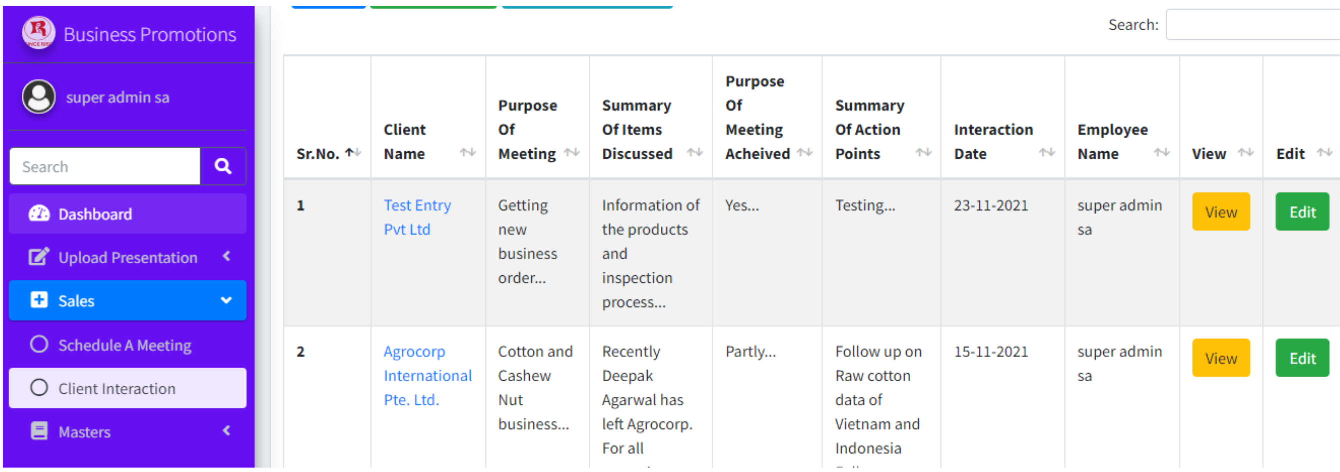
From,

Admin

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

Sale :: Client Interaction





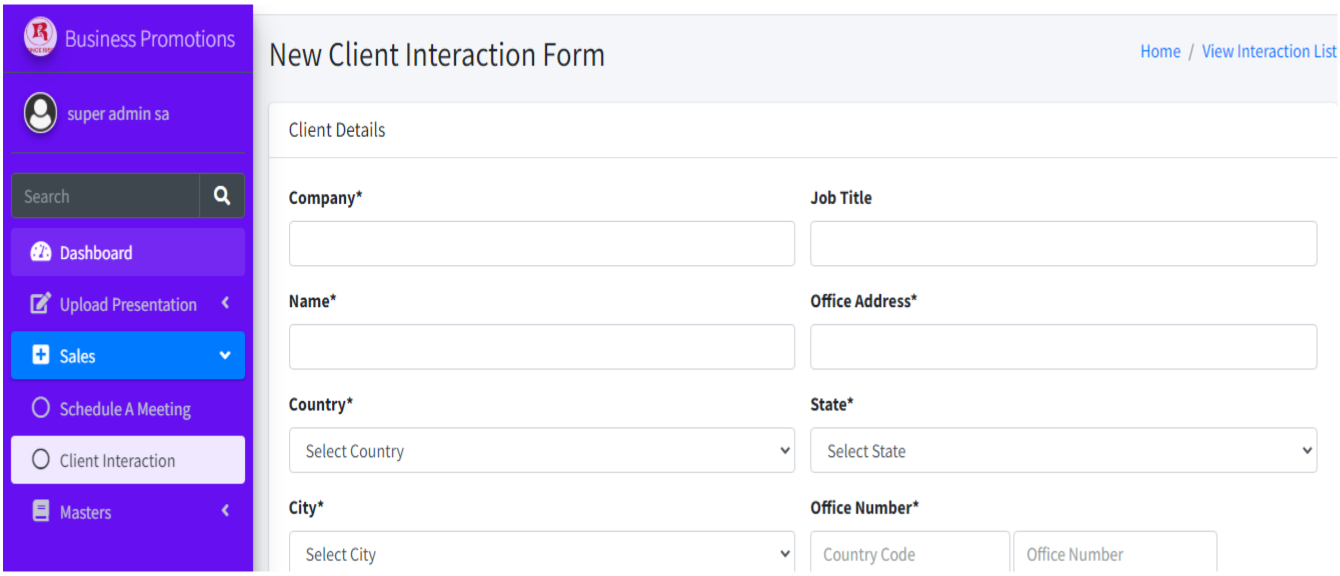
This screen displays the list of Client Interaction done by User or Employee after he has scheduled meeting with Client.

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.

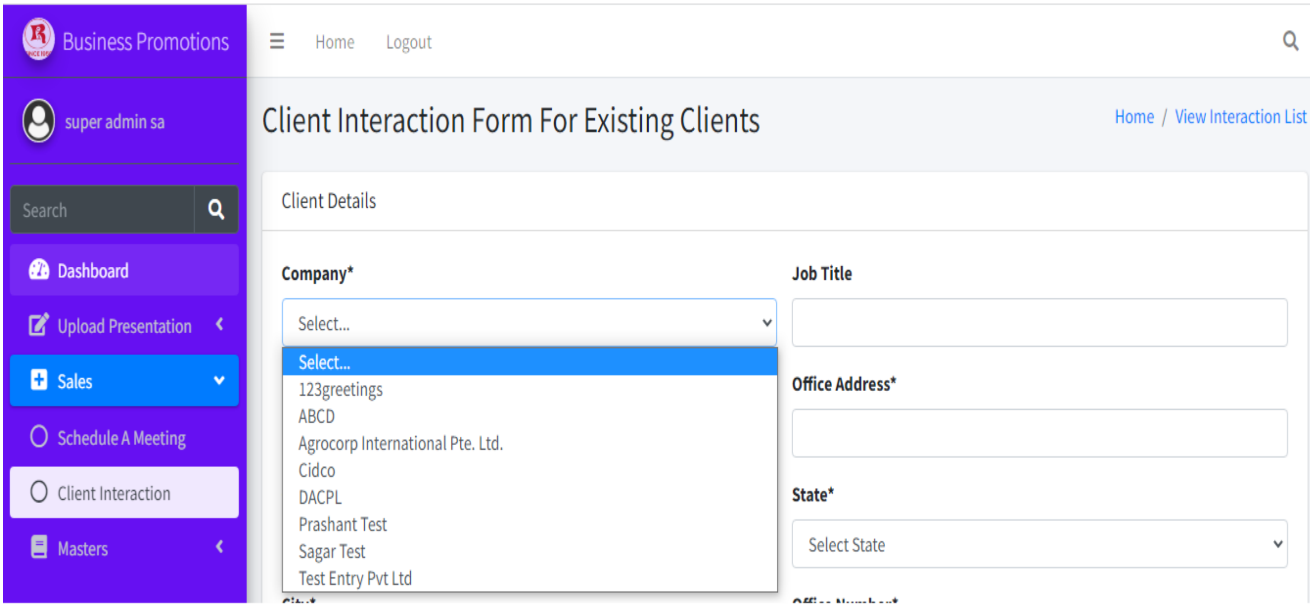
Add To Existing button will redirect user to screen where Client is already existed in the system.

New Client Interaction Form



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:



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.