

**User Manual for CTD Site
Workflow – An Internal
Document for Capital Business
System Private Limited Delhi**

**cbsl
group**

*building relations
since 1950*

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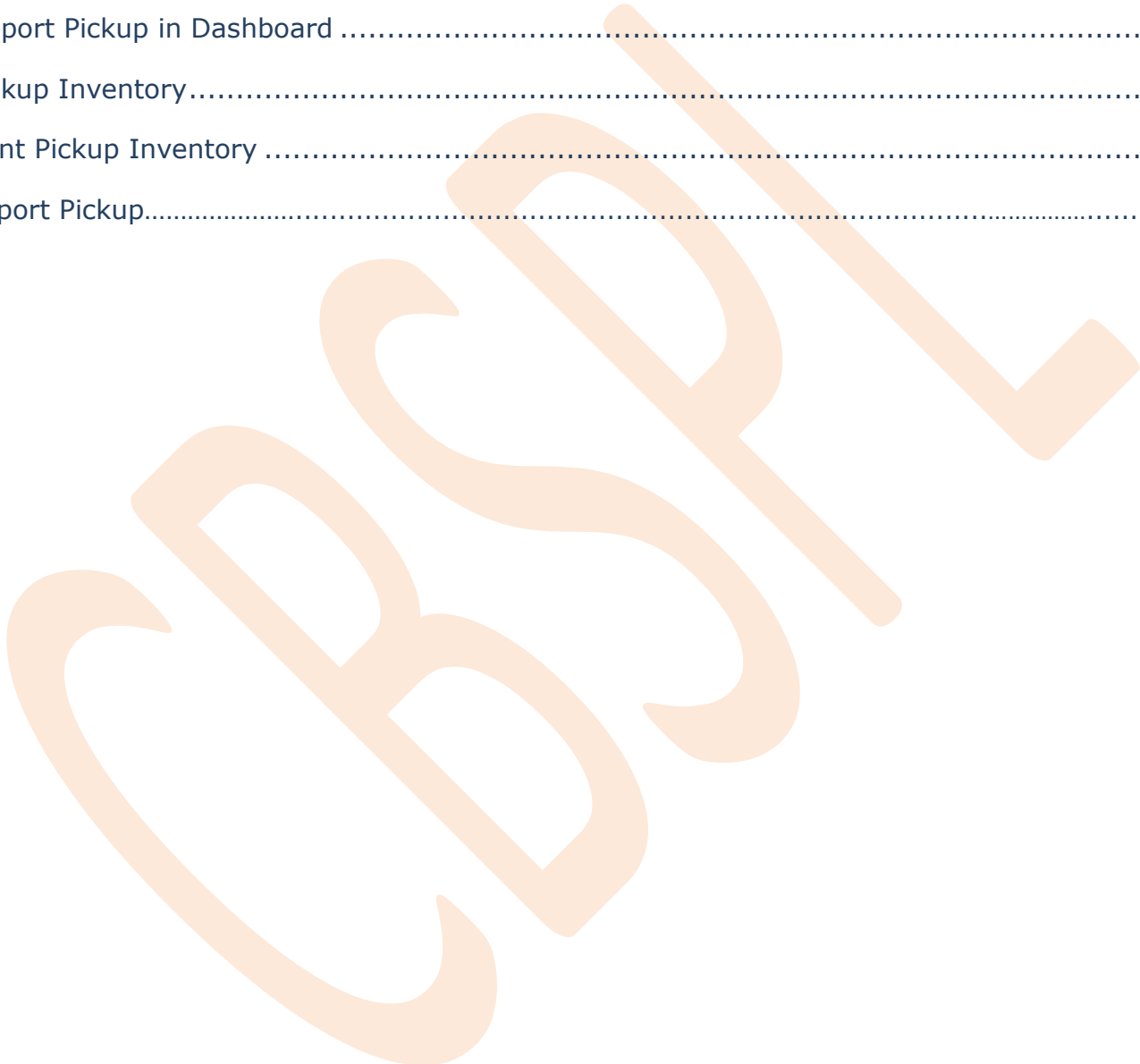
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CompanyProfile

Capital Business Systems Private Limited (CBSPL Group) concentrates all its efforts to become a globally trusted leader in Content Management, Document Imaging and Document Management Services.

CBSL is a professional business process outsourcing company providing digital media services such as document management, content management, digital typesetting and document imaging services to Business-to-Business and Business-to-Consumer.

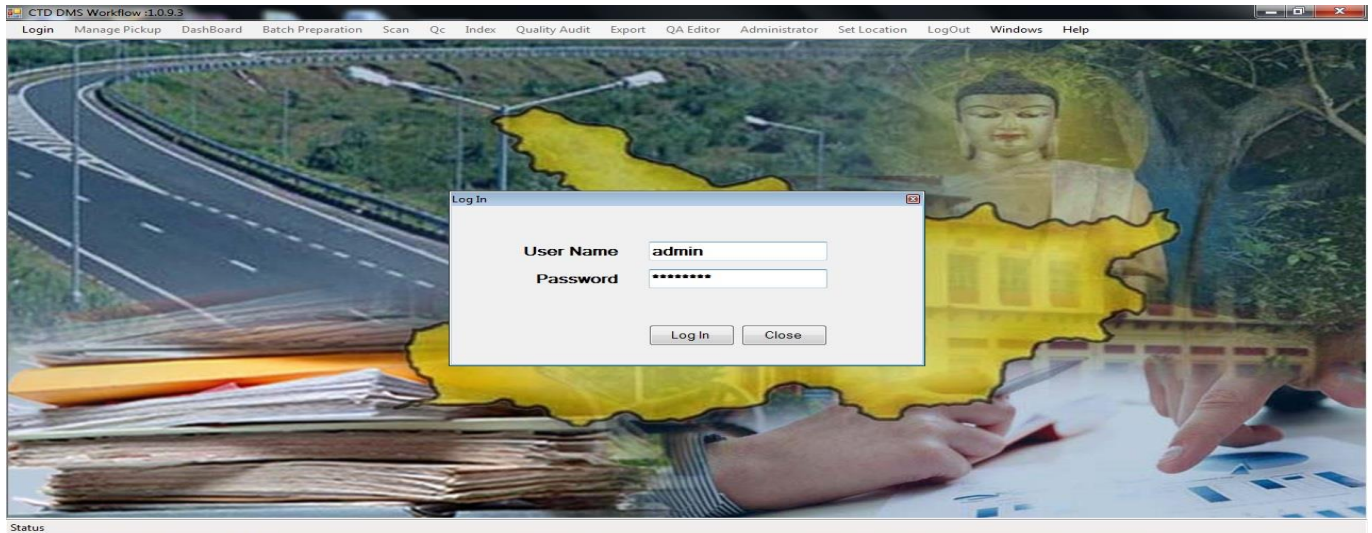
Name of the Company	Capital Business Systems Pvt Ltd.
Established	1950
Locations	Head Office: G-13, Udhyog Nagar, Industrial Area PeeraGrahi - 110041
CBSL Service Offering / Business Verticals	<ul style="list-style-type: none"> • Printing Solutions • Document Management Solutions • Record Management Solutions • Banking Automation • Integrated Solar Power Solutions
Employees	1500 + Professional s with rich experience in Various Business Verticals.

Introductions

- Purpose: - This document describes the step of task which can be done in CTD workflow.

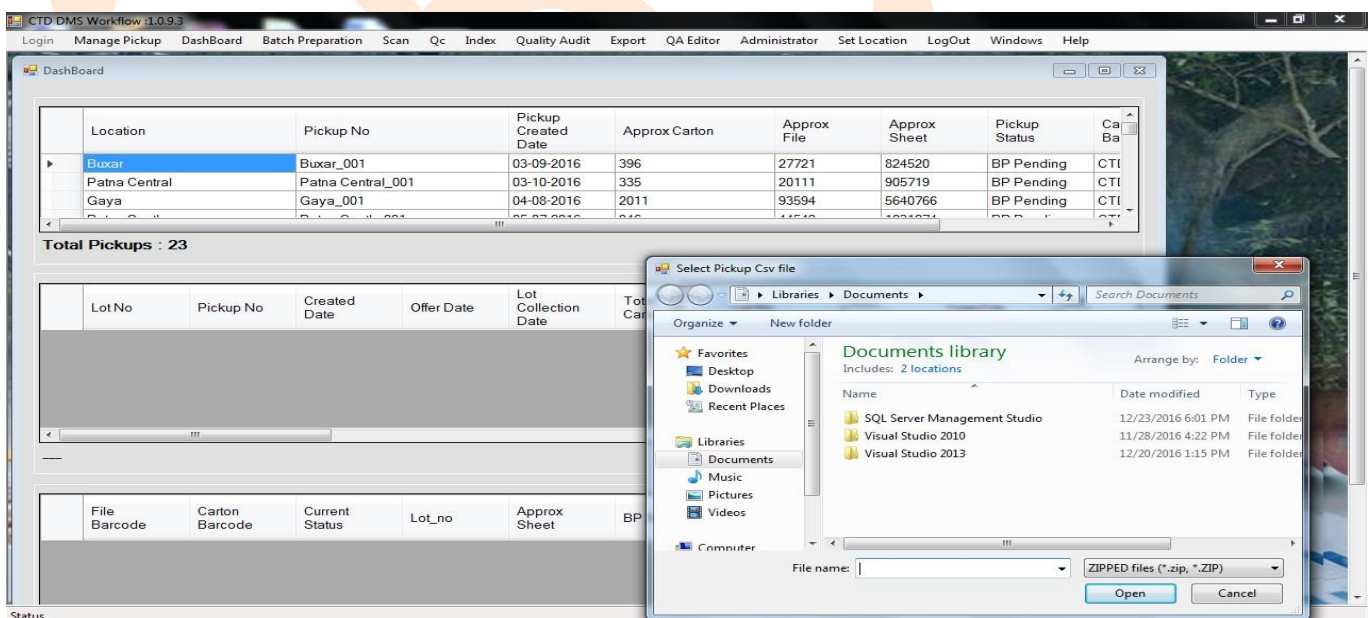
Step 1: CTD Site Workflow Login

1. CTD User must enter the valid Username and Password in Login Fields.
2. Press Login button after entering valid Username and Password to go further.
3. Related Screenshot is given below for more references.



Step 2: Import Pickup in Dashboard

1. For importing Pickup CSV in Workflow, User needs to select Dashboard in Manu Bar.
2. After showing a Dashboard, right click on Location and select 'Import CSV'.
3. Select the Pickup CSV file in Browse Box.
4. Related Screenshot is given below for more references.



Step 3: Pickup Inventory

1. To do Inventory User need to select Pickup Inventory in Manage Pickup tab menu.
2. In Pickup Inventory Form User can select or fill valid data against pickup file.
3. Select 'Add New File' to add one or more file.
4. User can get a list of saved file by clicking 'Get Saved File List'.
5. After entering all files against one carton user can save the carton by clicking 'Save Carton' button.
6. Like that user can enter the inventory related to all type of files
7. For more references Related Screenshots are given below.

CTD DMS Workflow 1.0.9.3

Login Manage Pickup Dashboard Batch Preparation Scan Qc Index Quality Audit Export QA Editor Administrator Set Location LogOut Windows Help

Pickup Inventory

Location Pickup Collection Date

Pickup Number

Office/Personal File Office Register CheckPost File CheckPost Register Secretariat File Miscellaneous File Vehicle Inspection File

☒ Office File ☐ Personal File ☐ Employee File

Carton Barcode CST No.

File Barcode ET No.

File Period DS Status

Tin/Reg. No. Total Sheet

Dealer Name To Be Scanned

PAN No.

Validate Dealer Name Get Saved File List Add New File Save Carton

File Period	Carton Barcode	File Barcode	Tin/Reg No	Dealer Name	CST No.	ET No.	DS Status	Total Sheet	To Sc

Status

CTD DMS Workflow 1.0.9.3

Login Manage Pickup Dashboard Batch Preparation Scan Qc Index Quality Audit Export QA Editor Administrator Set Location LogOut Windows Help

Pickup Inventory

Location Pickup Collection Date

Pickup Number

Office/Personal File Office Register CheckPost File CheckPost Register Secretariat File Miscellaneous File Vehicle Inspection File

☐ Office File ☒ Personal File ☐ Employee File

Carton Barcode CST No.

File Barcode ET No.

File Period DS Status

Tin/Reg. No. Total Sheet

Dealer Name To Be Scanned

PAN No.

Validate Dealer Name Get Saved File List Add New File Save Carton

File Period	Carton Barcode	File Barcode	Tin/Reg No	Dealer Name	CST No.	ET No.	DS Status	Total Sheet	To Sc

Status

CTD DMS Workflow :1.0.9.3

Login Manage Pickup DashBoard Batch Preparation Scan Qc Index Quality Audit Export QA Editor Administrator Set Location LogOut Windows Help

Pickup Inventory

Location Pickup Collection Date

Pickup Number

Office/Personal File Office Register CheckPost File CheckPost Register Secretariat File Miscellaneous File Vehicle Inspection File

☐ Office File ☐ Personal File ☒ Employee File

Carton Barcode CST No.

File Barcode ET No.

File Period DS Status

Tin/Reg. No. Total Sheet

Employee Name To Be Scanned

PAN No.

File Period	Carton Barcode	File Barcode	Employee Name	DS Status	Total Sheet	To Be Scanned	PAN Number	Remove File
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Status

10:33 AM 12/24/2016

CTD DMS Workflow :1.0.9.3

Login Manage Pickup DashBoard Batch Preparation Scan Qc Index Quality Audit Export QA Editor Administrator Set Location LogOut Windows Help

Pickup Inventory

Location Pickup Collection Date

Pickup Number

Office/Personal File Office Register CheckPost File CheckPost Register Secretariat File Miscellaneous File Vehicle Inspection File

Carton Barcode Register Period

File Barcode Total Sheet

Register Name/Type To Be Scanned

Register Name/Type	Carton Barcode	File Barcode	Register Period	Total Sheet	To Be Scanned	Remove File
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Status

10:37 AM 12/24/2016

CTD DMS Workflow :1.0.9.3

Login Manage Pickup Dashboard Batch Preparation Scan Qc Index Quality Audit Export QA Editor Administrator Set Location LogOut Windows Help

Pickup Inventory

Location: Pickup Collection Date:

Pickup Number:

Office/Personal File Office Register CheckPost File CheckPost Register Secretariat File Miscellaneous File Vehicle Inspection File

Carton Barcode: File Number:

File Barcode: Vehicle Number:

Case Date: Total Sheet:

To Be Scanned:

Get Saved File List Add New File Save Carton

File No	Carton Barcode	File Barcode	Case Date	Vehicle No.	Total Sheet	To Be Scanned	Remove File
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Status

10:39 AM 12/24/2016

CTD DMS Workflow :1.0.9.3

Login Manage Pickup Dashboard Batch Preparation Scan Qc Index Quality Audit Export QA Editor Administrator Set Location LogOut Windows Help

Pickup Inventory

Location: Pickup Collection Date:

Pickup Number:

Office/Personal File Office Register CheckPost File CheckPost Register Secretariat File Miscellaneous File Vehicle Inspection File

Carton Barcode: Register Period: Till:

File Barcode: Total Sheet:

Register Type: To Be Scanned:

Get Saved Register Add New Register Save Carton

Register Type	Carton Barcode	File Barcode	Register Period	Total Sheet	To Be Scanned	Remove File
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Status

10:43 AM 12/24/2016

CTD DMS Workflow:1.0.9.3

Login Manage Pickup Dashboard Batch Preparation Scan Qc Index Quality Audit Export QA Editor Administrator Set Location LogOut Windows Help

Pickup Inventory

Location Pickup Collection Date

Pickup Number

Office/Personal File Office Register CheckPost File CheckPost Register Secretariat File Miscellaneous File Vehicle Inspection File

Carton Barcode Total Pages (Tippani Side) ☒ Hindi

File Barcode Total Pages (Patrachar Side) ☐ English

File Number Total Pages

Subject

label48

Get Saved File List Add New File Save Carton

File Number	Carton Barcode	File Barcode	Subject	Total Pages (Tippani Side)	Total Pages (Patrachar Side)	Total Pages

Status

10:44 AM 12/24/2016

CTD DMS Workflow:1.0.9.3

Login Manage Pickup Dashboard Batch Preparation Scan Qc Index Quality Audit Export QA Editor Administrator Set Location LogOut Windows Help

Pickup Inventory

Location Pickup Collection Date

Pickup Number

Office/Personal File Office Register CheckPost File CheckPost Register Secretariat File Miscellaneous File Vehicle Inspection File

Carton Barcode Total Sheet

File Barcode To Be Scanned

File Type

Get Saved File List Add New File Save Carton

File Type	Carton Barcode	File Barcode	Total Sheet	To Be Scanned	Remove File

Status

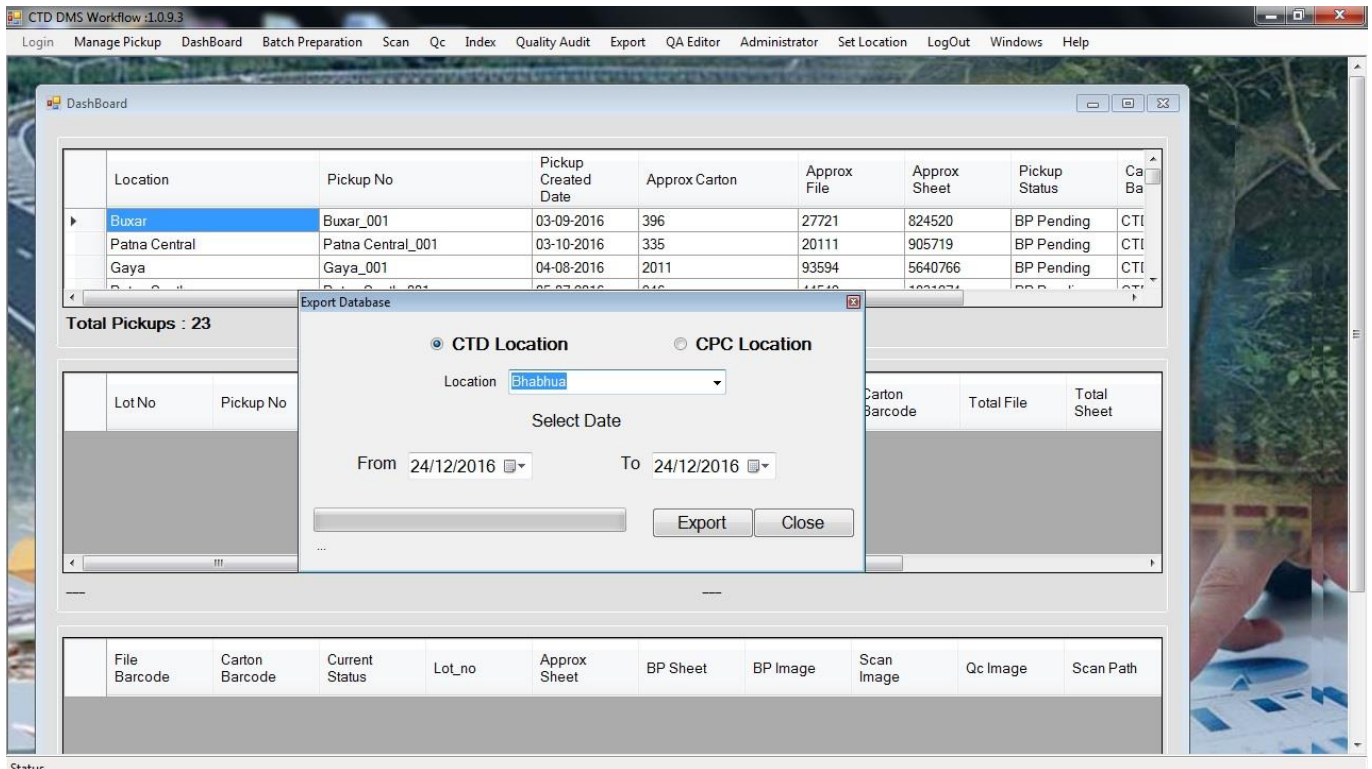
10:46 AM 12/24/2016

Step 4: Print Pickup Inventory

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- CTD DMS Workflow 1.0.9.3 - [Print Inventory]
- Login Manage Pickup DashBoard Batch Preparation Scan Qc Index Quality Audit Export QA Editor Administrator Set Location LogOut Windows Help
- ### Print Inventory Form
- Pickup No. Collection Dates
- Location Type File Type
- Show
- Print
- | Sr. No. | Dealer Name/Particulars | Document Type | Period | Tin No./Reg. No. | Total No. Of Sheets/(Approx) | Date Of Collection | File Barcode | Carton Barcode | Remark |
|---------|-------------------------|---------------|--------|------------------|------------------------------|--------------------|--------------|----------------|--------|
| | | | | | | | | | |
- Status

Step 5: Export Pickup

1. To Export Pickup user needs to go to Dashboard Menu.
2. Right Click on Location and select 'Export Pickup'.
3. Select 'CTD Location' and Pickup Location.



4. Now Select Dates and Press 'Export' Button to Export Pickup Zip File.

[End of the Document](#)