

# Referral Management System.

Start Up and a Step by Step Reference Manual

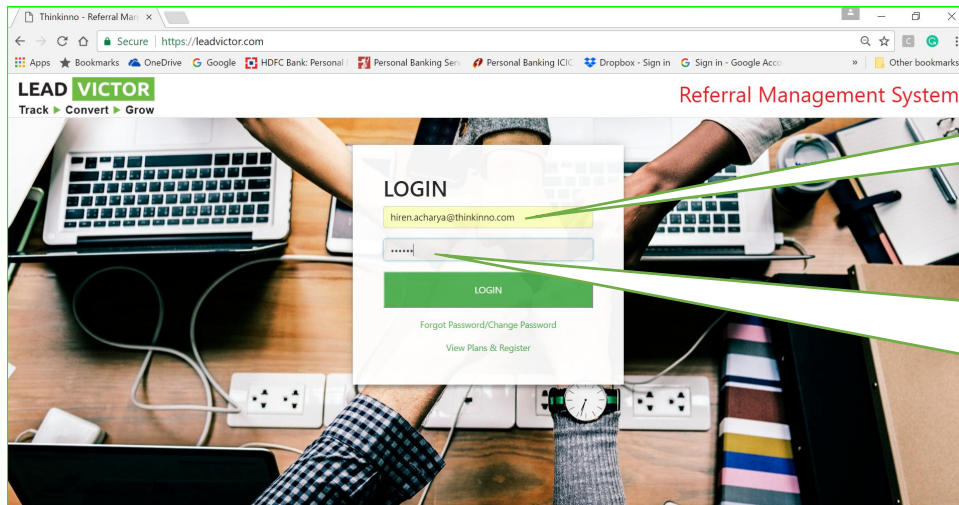


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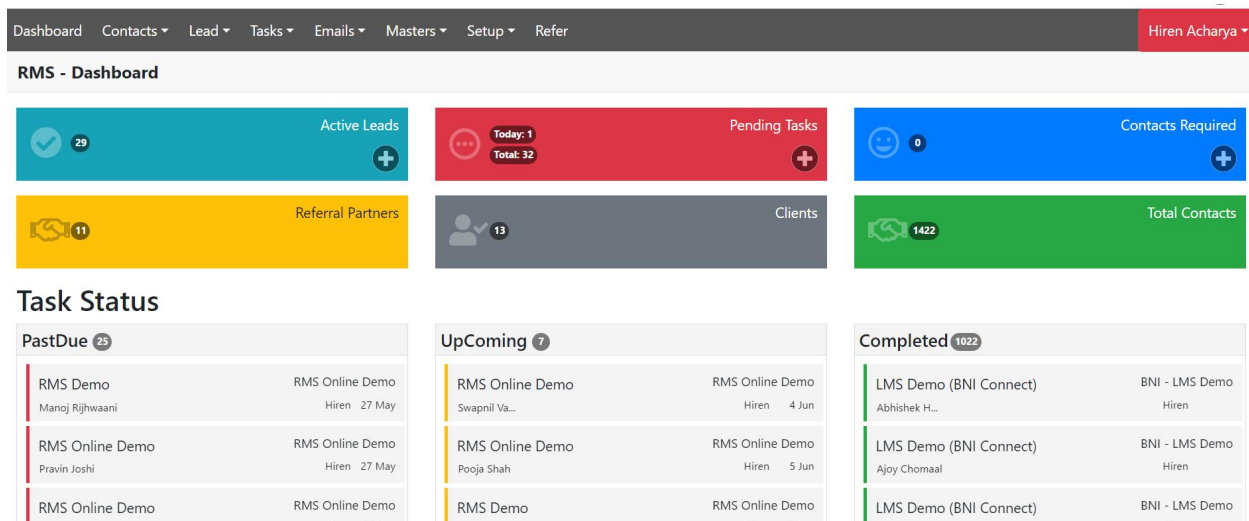
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1. How to Start the Application - Go to Google Chrome Browser



2. Viewing the Dashboard of Application. – Once you successfully login you can see the Dashboard screen as follows.



**3. Check your Company Details** – Check-up the company details of the Company. Edit and update the details if required. The steps are as follows.

The screenshot shows the 'RMS - Dashboard' with a navigation bar containing 'Dashboard', 'Contacts', 'Lead', 'Tasks', 'Emails', 'Masters', 'Setup', and 'Refer'. A dropdown menu is open under 'Setup', with 'Company' selected. A callout bubble points to this menu with the text: "Click on the Option Company".

Below the dashboard, there are two callouts: one pointing to the 'Edit' button in the 'RMS - Company Details' header with the text: "Click on 'Edit' button and edit the Company Details", and another pointing to the 'Update' button with the text: "Click on 'Update' button after you edit the company details".

The 'RMS - Company Details' form contains the following fields:

- Company Name: Thinkinno Technologies Pvt Ltd.
- GST Number: 27AAPFU0939F1ZV
- Address: 601 - Sanghavi Heights, Opp Shamshan Bhoomi, Off S.V Road, Malad (West), Mumbai 400064.
- Phone: 9892512585
- Email: hiren.acharya@thinkinno.com

**4. Add Users to the Application** – Add multiple users to your Application by the following steps

The screenshot shows the 'RMS - Dashboard' with the 'Masters' menu open. The 'User' option is selected. A callout bubble points to this option with the text: "Select the 'Master' menu and click on the 'User' option."

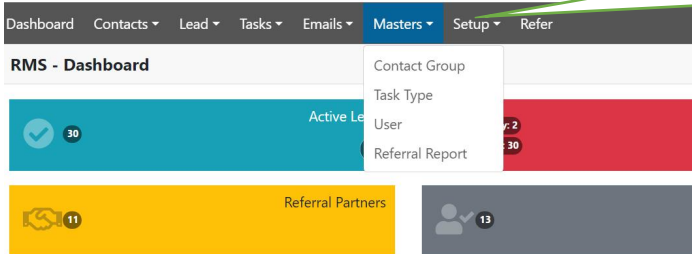
Below the dashboard, there are two callouts: one pointing to the '+' button in the 'RMS - User' header with the text: "Select '+' button to add a new user", and another pointing to the user list with the text: "You can view multiple users created in the list".

The 'RMS - User' page shows a table of users with the following columns: Name, Mobile Number, Email Address/ User Name, Password, and Status.

Name	Mobile Number	Email Address/ User Name	Password	Status
Audumber Doiphode		rahul.jaiswal@thinkinno.com	*****	Inactive
Hiren Acharya	9892512584	hiren.acharya@thinkinno.com	*****	Active
Prashant Tejnani	9953562568	rahul.jaiswal@thinkinno.com	*****	Inactive
Rahul Jaiswal	1234567899	rahul.jaiswal@thinkinno.com	*****	Active
test	1111111115	rahul.jaiswal@thinkinno.com	*****	Inactive
Vishal Mistry	9820620169	rahul.jaiswal@thinkinno.com	*****	Inactive

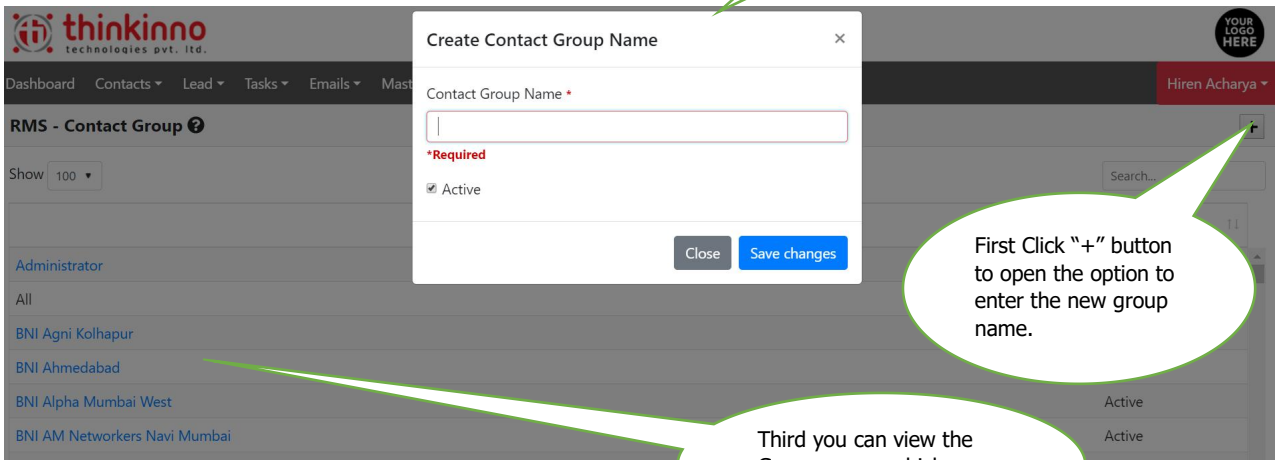
Showing 1 to 6 of 6 entries

5. Create Contact Groups - User can create “N” number of Contact Groups according to the requirement.



Select on “Master” and select “Contact Group” from the menu.

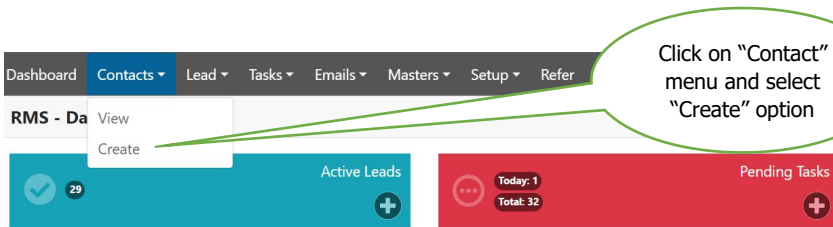
Create New Group Name and click on “Save Changes”



First Click “+” button to open the option to enter the new group name.

Third you can view the Group names which you create and save.

6. Create Contact – Create a first contact by the following steps.



Click on “Contact” menu and select “Create” option

Dashboard Contacts ▾ Lead ▾ Tasks ▾ Emails ▾ Masters ▾ Setup ▾ Refer Hiren Acharya ▾

**Contacts** Cancel Save

**Contact Information**

Assign To: Hiren Acharya Company:  **\*Required**

First Name:  **\*Required** Last Name:  **\*Required**

Title:  Email:

Mobile: 91  **\*Required** Whatsapp: 91

Phone: 91  Website:

Lead Source:  Lead Contact:

Contact Groups:  Industry:

No. of Employees:  Annual Revenue:

Email Opt Out:  Skype ID:

Secondary Email:  Twitter Id:

Date Of Birth:  Anniversary Date:

**Address**

Country:  State:

City:  Street:

Zip Code:

Description:  Remark:

You can view the Contact Create screen and enter the contact details

Mandatory Fields are shown as "Required"

Select and attach a single or multiple groups earlier made in point No. 5

**7. View Contacts.**

Dashboard **Contacts** ▾ Lead ▾ Tasks ▾ Emails ▾ Masters ▾ Setup ▾ Refer

RMS - Da View Create

Active Leads 29 Today: 1 Total: 32

Referral Partners 11 13

Click on "Contacts" Menu and select the option "View"

Dashboard Contacts Lead Tasks Emails Masters Setup Refer Hiren Acharya

**Contacts** Show Inactive + Select

Show 100 Search...

Name	Email	Phone	Company	Contact Groups	Leads
Aameer Kale	aameerk@aklegal.in	9892266916	AK Legal	BNI Mumbai BNI Odyssey	Add Lead
AANAND AGRAWAL	anandkrishanagrawaal@gmail.com	9322867451	AARTI CABLE & COMPOUNDS PVT LTD	BNI Mumbai BNI Creme	Add Lead
Aarti Lakhotia	omjewels@gmail.com	9004038688	Om Gems & Jewellers	BNI Alpha Mumbai West BNI Mumbai	Add Lead
Aashish Sharma	aashish@enli10it.com	9769760100	Enliten IT India	BNI Apex Mumbai West BNI Mumbai	Add Lead
Aashish Trivedi	Aashish.trivedi@viralwealth.in	9619555159	Viral Wealth Managers	BNI Mumbai BNI Exponential	Add Lead
Aastik Shah	yuvraajhospitality@gmail.com	9821894799	Yuvraaj Hospitality	BNI Athens BNI Mumbai	Add Lead
Aayushi Soni	aayushi.soni@rhmya.com	9987785581	Rhmya Jewels LLP	BNI Biz Angel BNI Mumbai	Add Lead
Abbas Sakanwala	abbas@midasdezn.com	9819167852	Midas Dezn Studio LLP	BNI Biz Angel BNI Mumbai	Add Lead

Showing 1 to 100 of 1,422 entries Previous 1 2 3 4 5 ... 15 Next

Can view multiple contacts in a table with the Contacts Name, Email, Phone, Company Name, Groups & Leads

8. Export to Excel of Contacts. – Exporting to Excel you can export all your contacts on to the excel file which is automatically downloaded on your computer by just once click.

Dashboard Contacts Lead Tasks Emails Masters Setup Refer Hiren Acharya

**Contacts** Show Inactive + Export To Excel

Show 100 Search...

Name	Email	Phone	Company	Contact Groups	Leads
Aameer Kale	aameerk@aklegal.in	9892266916	AK Legal	BNI Mumbai BNI Odyssey	Add Lead
AANAND AGRAWAL	anandkrishanagrawaal@gmail.com	9322867451	AARTI CABLE & COMPOUNDS PVT LTD	BNI Mumbai BNI Creme	Add Lead
Aarti Lakhotia	omjewels@gmail.com	9004038688	Om Gems & Jewellers	BNI Alpha Mumbai West BNI Mumbai	Add Lead

Select a dropdown menu and click on "Export to Excel"

9. Viewing Contacts with Multiple Filters

Select the "Filter Button" to view contacts applying multiple filters.

Dashboard Contacts Lead Tasks Emails Masters Setup Refer Hiren Acharya

**Contacts** Show Inactive Export To Excel

Source-All Contact-All Groups-All Client-All Referred-Any Leads-Any Apply

Show 100 Search...

Name	Email	Phone	Company	Contact Groups	Leads
Aameer Kale	aameerk@aklegal.in	9892266916	AK Legal	BNI Mumbai BNI Odyssey	Add Lead
AANAND AGRAWAL	anandkrishanagrawaal@gmail.com	9322867451	AARTI CABLE & COMPOUNDS PVT LTD	BNI Mumbai BNI Creme	Add Lead
Aarti Lakhotia	omjewels@gmail.com	9004038688	Om Gems & Jewellers	BNI Alpha Mumbai West BNI Mumbai	Add Lead



### 9.1. Listing contacts selecting the Source Group.

Dashboard Contacts Leads Tasks Emails Masters Setup Refer Hiren Acharya

**Contacts** Show Inactive + Select

BNI Harmony Contact - All Groups-All Client-All Referred-Any Leads-Any Apply

Search:

	Email	Phone	Company	Contact Groups	Leads
<input type="checkbox"/>	info@biznexusolutions.com	9833475407	BizNexus Solutions LLP	BNI Referral Client Referral Partner	View Leads
<input type="checkbox"/>	anamika@enhanskill.com	8657598991	Enhanskills	RMS Employee	View Leads
<input type="checkbox"/>	archat01@gmail.com	9765485641	Nehru Science Centre	BNI Referral Client Software	Add Lead
<input type="checkbox"/>	asmitachotalia@gmail.com	9892455559	Marcus Capital Management	RMS Employee	Add Lead
<input type="checkbox"/>	ats_pvtltd@hotmail.com	9322274255	ATS Mechanicals & Electronic Pvt Ltd.	BNI Referral Client	View Leads
<input type="checkbox"/>	bijeshsingh25@gmail.com	9930585633	xxxxx	BNI Referral Client	View Leads

Showing 1 to 25 of 50 entries Previous 1 2 Next

### 9.2. Listing Contacts selecting the Source Contact.

Dashboard Contacts Leads Tasks Emails Masters Setup Refer Hiren Acharya

**Contacts** Show Inactive + Select

BNI Harmony Contact - All Groups-All Client-All Referred-Any Leads-Any Apply

Show 25 entries Search:

	Name	Phone	Company	Contact Groups	Leads
<input type="checkbox"/>	Amol Apte	9833475407	BizNexus Solutions LLP	BNI Referral Client Referral Partner	View Leads
<input type="checkbox"/>	Anamika Mishra	8657598991	Enhanskills	RMS Employee	View Leads
<input type="checkbox"/>	Amab Chatterjee	9765485641	Nehru Science Centre	BNI Referral Client Software	Add Lead
<input type="checkbox"/>	Asmita Chotalia	9892455559	Marcus Capital Management	RMS Employee	Add Lead
<input type="checkbox"/>	Balwant Singh	9322274255	ATS Mechanicals & Electronic Pvt Ltd.	BNI Referral Client	View Leads
<input type="checkbox"/>	Bijesh Singh	9930585633	xxxxx	BNI Referral Client	View Leads

Showing 1 to 25 of 50 entries Previous 1 2 Next

### 9.3. Listing Contacts from Single group or multiple Groups.

The screenshot shows the 'Contacts' page in the Lead Victor application. The top navigation bar includes 'Dashboard', 'Contacts', 'Leads', 'Tasks', 'Emails', 'Masters', 'Setup', and 'Refer'. The user 'Hiren Acharya' is logged in. The page title is 'Contacts' and there are options to 'Show Inactive' and 'Select'. Below the navigation, there are filters for 'BNI Harmony', 'Contact - All', 'Groups - All', 'Client - All', 'Referred - Any', and 'Leads - Any'. A dropdown menu for 'Groups - All' is open, showing options like 'BNI Ahmedabad', 'BNI Agni Kolhapur', and 'BNI AM Networkers Navi Mumbai'. The main table lists contacts with columns for Name, Email, Company, Contact Groups, and Leads. The table shows 25 entries, with pagination controls at the bottom.

## 10. Create Lead.

The screenshot shows the 'RMS - Dashboard' page. The top navigation bar includes 'Dashboard', 'Contacts', 'Lead', 'Tasks', 'Emails', 'Masters', 'Setup', and 'Refer'. The 'Lead' menu is open, showing options for 'View' and 'Create'. A callout box with a green border and a line pointing to the 'Create' option contains the text: 'Click on "Lead" and select "Create" from the menu.' The dashboard features several widgets: 'Active Leads' (29), 'Today: 1 Total: 32', 'Referral Partners' (11), and a user profile widget (13).

### 10.1. Lead Create points.

- 10.1.1. Enter Contact Name – (Mandatory Field)
- 10.1.2. Enter Lead Title.
- 10.1.3. Lead Start Date
- 10.1.4. Assign lead to – (User)
- 10.1.5. Status – (By default it will be WIP – Work in Progress)
- 10.1.6. Lead Description – (250 characters detailed input)

Lead Create Screen

Dashboard Contacts ▾ Lead ▾ Tasks ▾ Emails ▾ Masters ▾ Setup ▾ Refer Hiren Acharya ▾

**Lead** Cancel Save

Contact Name  **\*Required**

Lead Title

Start Date

Description

Assign

Status

## 11. View Leads.

Lead View Screen

Dashboard Contacts ▾ Lead ▾ Tasks ▾ Emails ▾ Masters ▾ Setup ▾ Refer Hiren Acharya ▾

**Lead** + Export To Excel

Show

Day(s)	Title	Name	Company	Phone	Email	Assigned	Status
2	<a href="#">RMS Online Demo</a>	Swapnil Vaishampayan	Serendipity Tours & Travels	9820826175	swapnil@serendipitytours.in	Hiren A	WIP
2	<a href="#">RMS Online Demo</a>	Yasin	Dewberry Holidays	7506701473	accounts@dewberryholidays.com	Hiren A	WIP
3	<a href="#">RMS Online Demo</a>	Kalpesh Jha	Stallions Futurx Limited	9594987700	kalpeshj@stallionsfuturx.com	Hiren A	WIP
9	<a href="#">RMS Online Demo</a>	Chitrang Oza	P J Wealth Advisors	8779776163	pjwealthadvisors@gmail.com	Hiren A	WIP
9	<a href="#">RMS Online Demo</a>	Pooja Shah	ChokiMoki	7733049872	Chokimokihmc@gmail.com	Hiren A	WIP
9	<a href="#">RMS Online Demo</a>	Rajat Singh	Kingdong	8699579573	rajat.singh@kingdong.com	Hiren A	WIP
10	<a href="#">RMS Webminar Demo</a>	Ajitpal Singh	LIVE - O - LIVE TECHNICALS LLP	9136091330	ajit.singh@liveolivetechnicals.com	Hiren A	WIP
12	<a href="#">RMS Online Demo</a>	Chetan Suchak	No Name	4739348384	chetan@creativeeyeav.com	Hiren A	WIP

Showing 1 to 29 of 29 entries (filtered from 141 total entries) Previous **1** Next

## 12. Export to Excel of Leads.

Click the button to export the leads displayed on the screen to Excel.

Dashboard Contacts ▾ Lead ▾ Tasks ▾ Emails ▾ Masters ▾ Setup ▾ Refer Hiren Acharya ▾

**Lead** + Export To Excel

Show

Day(s)	Title	Name	Company	Phone	Email	Assigned	Status
2	<a href="#">RMS Online Demo</a>	Swapnil Vaishampayan	Serendipity Tours & Travels	9820826175	swapnil@serendipitytours.in	Hiren A	WIP
2	<a href="#">RMS Online Demo</a>	Yasin	Dewberry Holidays	7506701473	accounts@dewberryholidays.com	Hiren A	WIP

### 13. View Leads Applying Multiple Filters.

Click to view the leads by applying multiple filters.

Dashboard Contacts Lead Tasks Emails Masters Setup Refer Hiren Acharya

**Lead** + Export To Excel

to

Show

Day(s)	Title	Name	Company	Phone	Email	Assigned	Status
2	RMS Online Demo	Swapnil Vaishampayan	Serendipity Tours & Travels	9820826175	swapnil@serendipitytours.in	Hiren A	WIP
2	RMS Online Demo	Yasin	Dewberry Holidays	7506701473	accounts@dewberryholidays.com	Hiren A	WIP
3	RMS Online Demo	Kalpesh Jha	Stallions Futurx Limited	9594987700	kalpesh.j@stallionsfuturx.com	Hiren A	WIP

#### 13.1. Listing leads with Old Days. – i.e. 30 days, 60 days and 90 days.

Dashboard Contacts Leads Tasks Emails Masters Setup Refer Hiren Acharya

**Lead** + Export To Excel

to

Show

Day(s)	Title	Name	Company	Phone	Email	Assigned	Status
8	RMS Online Demo	Apurva Thakker	Bhavana Televentures Limited	9892198921	apurva.thakker@bhavanatele.com	Hiren A	WIP
8	RMS Online Demo	Sojan Thomas	No Name	764784646	sojan@planmyfinance.in	Hiren A	WIP
17	RMS Online Demo	Swapnil Vaishampayan	Serendipity Tours & Travels	9820826175	swapnil@serendipitytours.in	Hiren A	WIP
18	RMS Online Demo	Kalpesh Jha	Stallions Futurx Limited	9594987700	kalpesh.j@stallionsfuturx.com	Hiren A	WIP
24	RMS Online Demo	Pooja Shah	Chokimoki	7733049872	Chokimokihmc@gmail.com	Hiren A	WIP
25	RMS Webinar Demo	Ajitpal Singh	LIVE - O - LIVE TECHNICALS LLP	9136091330	ajit.singh@liveolivetechicals.com	Hiren A	WIP
27	RMS Online Demo	Darshit Udani	No Name	8080888427	supremeoverseas@yahoo.com	Hiren A	WIP

### 13.2. Listing leads with Date Range.

Dashboard Contacts Leads Tasks Emails Masters Setup Refer Hiren Acharya

**Lead** Export To Excel

Past 30 days  to  Assigned - All SourceContact Contact - All WIP Apply

Show 100 WIP

Day(s)	Title	Name	Company	Phone	Email	Assigned	Status
8	RMS Online Demo	Apurva Thakker	Bhavana Televentures Limited	9892198921	apurva.thakker@bhavanatele.com	Hiren A	WIP
8	RMS Online Demo	Sojan Thomas	No Name	764784646	sojan@planmyfinance.in	Hiren A	WIP
17	RMS Online Demo	Swapnil Vaishampayan	Serendipity Tours & Travels	9820826175	swapnil@serendipitytours.in	Hiren A	WIP
18	RMS Online Demo	Kalpesh Jha	Stallions Futurx Limited	9594987700	kalpesh.j@stallionsfuturx.com	Hiren A	WIP
24	RMS Online Demo	Pooja Shah	Chokimoki	7733049872	Chokimokihmc@gmail.com	Hiren A	WIP
25	RMS Webinar Demo	Ajitpal Singh	LIVE - O - LIVE TECHNICALS LLP	9136091330	ajit.singh@liveolivetechnicals.com	Hiren A	WIP
27	RMS Online Demo	Darshit Udani	No Name	8080888427	supremeoverseas@yahoo.com	Hiren A	WIP

### 13.3. Listing leads assigned to Users.

Dashboard Contacts Leads Tasks Emails Masters Setup Refer Hiren Acharya

**Lead** Export To Excel

Past 30 days  to  Assigned - All SourceContact Contact - All WIP Apply

Show 100 WIP

Day(s)	Title	Name	Company	Phone	Email	Assigned	Status
8	RMS Online Demo	Apurva Thakker	Bhavana Televentures Limited	9892198921	apurva.thakker@bhavanatele.com	Hiren A	WIP
8	RMS Online Demo	Sojan Thomas	No Name	764784646	sojan@planmyfinance.in	Hiren A	WIP
17	RMS Online Demo	Swapnil Vaishampayan	Serendipity Tours & Travels	9820826175	swapnil@serendipitytours.in	Hiren A	WIP
18	RMS Online Demo	Kalpesh Jha	Stallions Futurx Limited	9594987700	kalpesh.j@stallionsfuturx.com	Hiren A	WIP
24	RMS Online Demo	Pooja Shah	Chokimoki	7733049872	Chokimokihmc@gmail.com	Hiren A	WIP
25	RMS Webinar Demo	Ajitpal Singh	LIVE - O - LIVE TECHNICALS LLP	9136091330	ajit.singh@liveolivetechnicals.com	Hiren A	WIP
27	RMS Online Demo	Darshit Udani	No Name	8080888427	supremeoverseas@yahoo.com	Hiren A	WIP

### 13.4. Listing leads from the Groups.

Dashboard Contacts Leads Tasks Emails Masters Setup Refer Hiren Acharya

**Lead** Export To Excel

to

Show

Day(s)	Title	Name	Company	Email	Assigned	Status
8	RMS Online Demo	Apurva Thakker	Bhavana Televentures Limited	apurva.thakker@bhavanatele.com	Hiren A	WIP
8	RMS Online Demo	Sojan Thomas	No Name	sojan@planmyfinance.in	Hiren A	WIP
17	RMS Online Demo	Swapnil Vaishampayan	Serendipity Tours & Travels	swapnil@serendipitytours.in	Hiren A	WIP
18	RMS Online Demo	Kalpesh Jha	Stallions Futurx Limited	kalpeshj@stallionsfuturx.com	Hiren A	WIP
24	RMS Online Demo	Pooja Shah	ChokiMoki	7733049872 Chokimokihmc@gmail.com	Hiren A	WIP
25	RMS Webinar Demo	Ajitpal Singh	LIVE - O - LIVE TECHNICALS LLP	9136091330 ajit.singh@liveolivetechicals.com	Hiren A	WIP
27	RMS Onine Demo	Darshit Udani	No Name	8080888427 supremeoverseas@yahoo.com	Hiren A	WIP

### 13.5. Listing leads from the Contacts.

Dashboard Contacts Leads Tasks Emails Masters Setup Refer Hiren Acharya

**Lead** Export To Excel

to

Show

Day(s)	Title	Name	Company	Phone	Assigned	Status
8	RMS Online Demo	Apurva Thakker	Bhavana Televentures Limited	9892198921 apurva	Hiren A	WIP
8	RMS Online Demo	Sojan Thomas	No Name	764784646 sojan	Hiren A	WIP
17	RMS Online Demo	Swapnil Vaishampayan	Serendipity Tours & Travels	9820826175 swap	Hiren A	WIP
18	RMS Online Demo	Kalpesh Jha	Stallions Futurx Limited	9594987700 kalpe	Hiren A	WIP
24	RMS Online Demo	Pooja Shah	ChokiMoki	7733049872 Chokimokihmc@gmail.com	Hiren A	WIP
25	RMS Webinar Demo	Ajitpal Singh	LIVE - O - LIVE TECHNICALS LLP	9136091330 ajit.singh@liveolivetechicals.com	Hiren A	WIP
27	RMS Onine Demo	Darshit Udani	No Name	8080888427 supremeoverseas@yahoo.com	Hiren A	WIP



### 13.6. Listing leads by the Lead Status.

Dashboard Contacts Leads Tasks Emails Masters Setup Refer Hiren Acharya

**Lead** + Export To Excel

to

Show

Day(s)	Title	Name	Company	Phone	Email	Status
8	RMS Online Demo	Apurva Thakker	Bhavana Televentures Limited	9892198921	apurva.thakker@bhavanatele.com	WIP
8	RMS Online Demo	Sojan Thomas	No Name	764784646	sojan@planmyfinance.in	Hiren A WIP
17	RMS Online Demo	Swapnil Vaishampayan	Serendipity Tours & Travels	9820826175	swapnil@serendipitytours.in	Hiren A WIP
18	RMS Online Demo	Kalpesh Jha	Stallions Futurx Limited	9594987700	kalpeshj@stallionsfuturx.com	Hiren A WIP
24	RMS Online Demo	Pooja Shah	ChokiMoki	7733049872	Chokimokihmc@gmail.com	Hiren A WIP
25	RMS Webinar Demo	Ajitpal Singh	LIVE - O - LIVE TECHNICALS LLP	9136091330	ajit.singh@liveolivetechicals.com	Hiren A WIP
27	RMS Onine Demo	Darshit Udani	No Name	8080888427	supremeoverseas@yahoo.com	Hiren A WIP

### 14. Graphical View of The Leads.

Click the button to view the Graphic view of Leads.

Dashboard Contacts Lead Tasks Emails Masters Setup Refer Hiren Acharya

**Lead** + Export To Excel

Show

Day(s)	Title	Name	Company	Phone	Email	Assigned	Status
2	RMS Online Demo	Swapnil Vaishampayan	Serendipity Tours & Travels	9820826175	swapnil@serendipitytours.in	Hiren A	WIP
2	RMS Online Demo	Yasin	Dewberry Holidays	7506701473	accounts@dewberryholidays.com	Hiren A	WIP

Dashboard Contacts Lead Tasks Emails Masters Setup Refer Hiren Acharya

**Lead** + Export To Excel

**Leads Status**

141

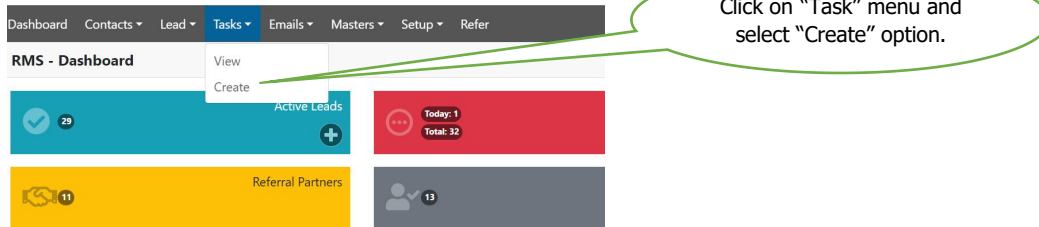
- Open
- Closed
- Other

**Open vs Closed**

- Open
- Closed

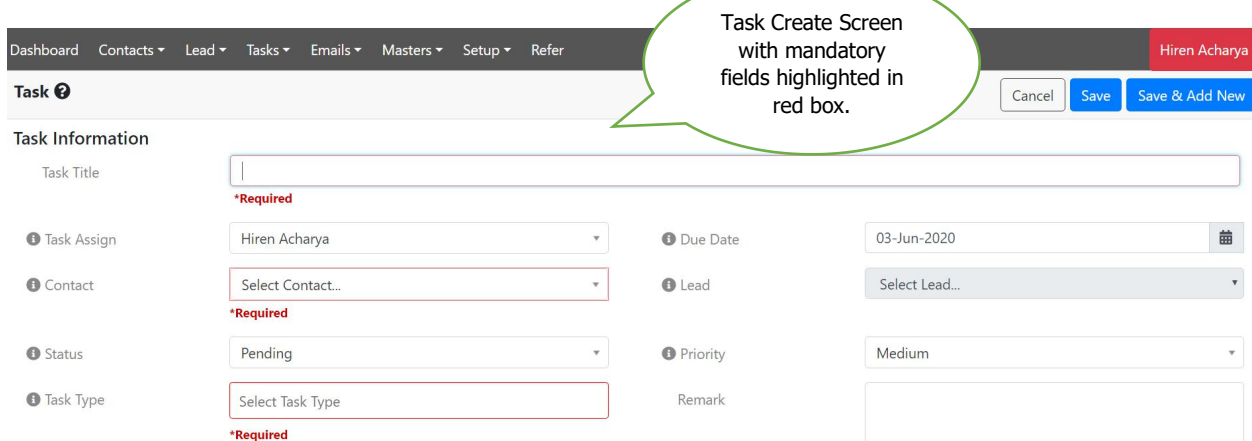
Graphic view of Leads Status.

## 15. Create Task.

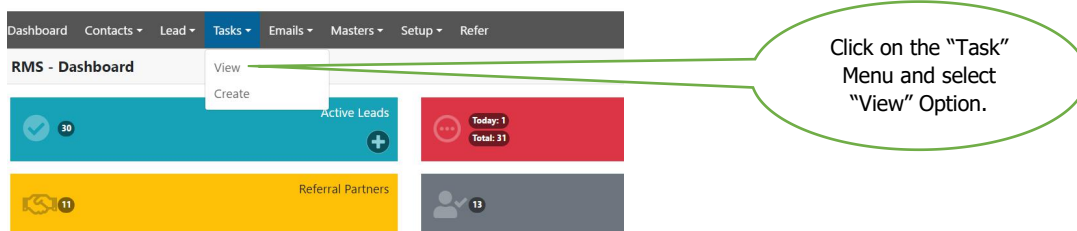


## 16. Task Create Points.

- 16.1. Enter Task Title - (Mandatory)
- 16.2. Task Assign – To which user you want to assign the task.
- 16.3. Task Contact – Select the Contact for whom we want to create the task. (Mandatory)
- 16.4. Task Status – Can select Pending, Done, WIP -Work in Progress
- 16.5. Task Type – Can select any one task from the predefined as well as User defined task (Mandatory).
- 16.6. Due Date – Due date of the Task to be performed.
- 16.7. Lead Name – Auto display If Contact is having one lead for multiple lead you can select.
- 16.8. Priority – Can select High, Medium and Low priority of the task.
- 16.9. Remark - Can input the text remarks up to 250 characters.



## 17. View Task.





Task View Screen

Dashboard Contacts Lead Tasks Emails Masters Setup Refer Hiren Acharya

**Tasks** + Export To Excel

**Filter**

From Date: 04-May-2020 To Date: 03-Jul-2020 Assigned: All

Pending  
 WIP  
 Done  
 AutoMail

[View Report](#)

Show: 100 Pastdue:22 Upcoming:3 Search...

Task Title	Lead	Contact	Due	Priority	Type	Assigned	Auto Email	Status	Completed
RMS Demo	RMS Demo	Ajay Shah	01-Jun-20	Medium	Call	Hiren	No	Pending	<input type="checkbox"/>
RMS Webinar Demo	RMS Webminal Demo	Ajitpal Singh	01-Jun-20	Medium	Call	Hiren	No	Pending	<input type="checkbox"/>
LMS Demo	LMS Demo - JustDial	Anjan Chaudhary	01-Jun-20	Medium	Call	Hiren	No	Pending	<input type="checkbox"/>
RMS Online Demo	RMS Online Demo	Bhavesh Thakker	01-Jun-20	Medium	Call	Hiren	No	Pending	<input type="checkbox"/>
LMS Demo	BNI - LMS Demo	Bijesh Singh	01-Jun-20	Medium	Call	Hiren	No	Pending	<input type="checkbox"/>
RMS Online Demo	RMS Online Demo	Deepak Rangwani	15-Jun-20	Medium	Call	Hiren	No	Pending	<input type="checkbox"/>
RMS Online Demo	RMS Demo	Gajanan Kerkar	01-Jun-20	Medium	Call	Hiren	No	Pending	<input type="checkbox"/>

**18. Export to Excel of Task.**

Click on the button to download the excel sheet of Tasks

Dashboard Contacts Lead Tasks Emails Masters Setup Refer Hiren Acharya

**Tasks** + Export To Excel

**Filter**

From Date: 04-May-2020 To Date: 03-Jul-2020 Assigned: All

Pending  
 WIP  
 Done  
 AutoMail

[View Report](#)

Show: 100 Pastdue:22 Upcoming:9 Search...

Task Title	Lead	Contact	Due	Priority	Type	Assigned	Auto Email	Status	Completed
LMS Demo	LMS Demo - JustDial	Anjan Chaudhary	01-Jun-20	Medium	Call	Hiren	No	Pending	<input type="checkbox"/>
LMS Demo	BNI - LMS Demo	Bijesh Singh	01-Jun-20	Medium	Call	Hiren	No	Pending	<input type="checkbox"/>

**19. Create Task Types.** – User can create “N” number of tasks type as per the business requirement.

Select on “Master” and select “Task Type” from the menu.

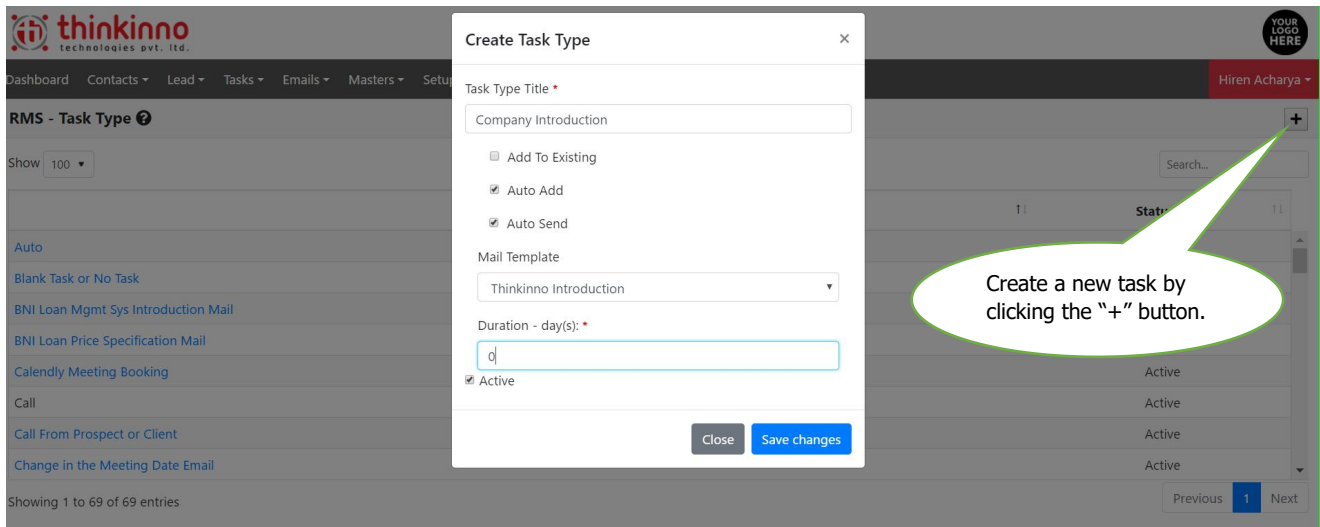
Dashboard Contacts Lead Tasks Emails **Masters** Setup Refer

**RMS - Dashboard**

- Contact Group
- Task Type**
- User
- Referral Report

Active Leads: 30

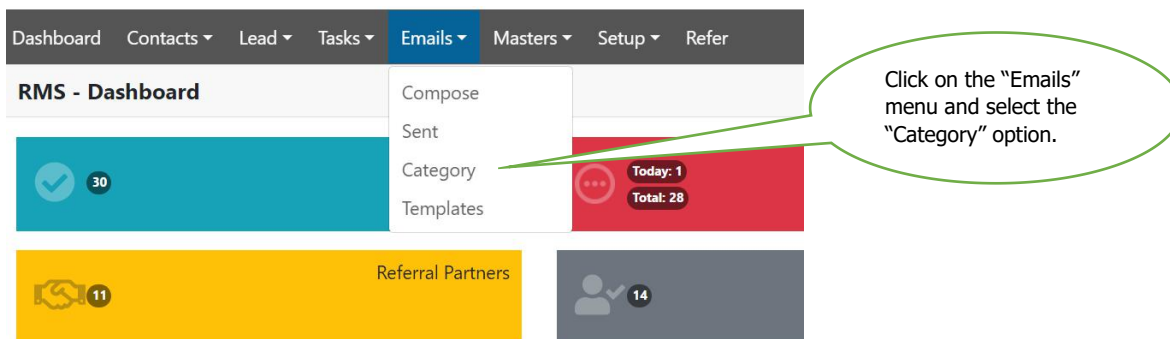
Referral Partners: 11



19.1. **Auto Add Facility** - This option is selected while creating a task type when you want to add a particular task automatically while creating any lead. This task will be auto listed once the any lead is created for the contact.

19.2. **Auto Send Facility** – This option is used while creating a task type in which you can send a selected email automatically on creation of any lead. You can also provide the days in the “Duration – Days” box that after how many days you would like to send this email automatically. If you input “0” zero means you would like to send it as soon as lead is created and if numeric “1” ,”2” that means you would like to send the email automatically after number of days entered in the box.

## 20. Create Email Category.



**Create Email Category**

Category Name \*  
Business Mails

Description \*  
Business Regular Mails

Active

Close Save changes

Create a new email category by clicking the "+" button.

Create New Category for Emails.

## 21. Create Email Template.

Dashboard Contacts Lead Tasks **Emails** Masters Setup Refer

**RMS - Dashboard**

Compose  
Sent  
Category  
Templates

Total: 28

Referral Partners 11

14

Click on the "Emails" menu and select the "Templates" option.

Dashboard Contacts Lead Tasks Emails Masters Setup Refer

**RMS - Email Templates**

Show 100 Search...

Category	Template Name	Subject	Status
Business Promotion Mails	<a href="#">RMS Calculator Promotion Email</a>	Business Calculator by Thinkinno Technologies - BNI Harmony	Active
Business Promotion Mails	<a href="#">Webminar Promotion Email</a>	Effectively Grow Sales - Free Webinar by Thinkinno	Active
Business Promotion Mails	<a href="#">Webminar 2 Email</a>	Effectively Grow Sales - Free Webinar by Thinkinno	Active
Business Regular Emails	<a href="#">MOM</a>	MOM - Thinkinno - (Company Name) - (Date)	Active

Create a new email template by clicking the "+" button.

View and Edit the Email Templates.

### 21.1. Steps to Create a new Email Template.

- 21.1.1. Select the “Category”.
- 21.1.2. Enter “Template Name”.
- 21.1.3. Enter “Subject”.
- 21.1.4. Insert First Name and Last Name from the Dropdown “Insert”.
- 21.1.5. Create or Copy paste the Body text of the email.
- 21.1.6. There is a facility to “Attach Files” to the email.
- 21.1.7. “Save” the Email Template.

Dashboard Contacts ▾ Lead ▾ Tasks ▾ Emails ▾ Masters ▾ Setup ▾ Refer Hiren Acharya ▾

**RMS - Email Template** Cancel Save

Category: Business Regular Emails Template Name: Thinkinno Introduction

From: hiren.acharya@thinkinno.com

Subject: Introduction - Thinkinno Technologies

Insert: Select   
 Attach Files

Thinkinno\_Capability\_Deck.pdf   
  Thinkinno-Info.pdf

Dear <First Name> <Last Name>,  
This is Hiren from Thinkinno Technologies. We at Thinkinno, provide customized software development services. We develop web-based and mobile-based applications as per the business requirements. Providing quality services is the main motto of our organisation and we have never compromised the quality of our services. We provide software development services in India and also do offshore development for the client in the USA.  
I am forwarding you our Company Profile and Client Projects with this Email. Any suggestion and requirement of information are welcome from you.  
Looking forward to our meeting to create an initial link for our future business relation.  
**Thanks & Regards,**

### 22. Compose an Email.

Dashboard Contacts ▾ Lead ▾ Tasks ▾ **Emails** ▾ Masters ▾ Setup ▾ Refer

**RMS - Dashboard**

Compose   
 Sent   
 Category   
 Templates

30

Referral Partners 11

Today: 1   
 Total: 28

14

Click on the “Emails” menu and select the “Compose” option.

22.1. Steps to Compose an Email Selecting a ready Template.

- 22.2. Select the “Template” .
- 22.3. Select the “To” – The Contact name, Email Id, Group Name.
- 22.4. Select “Cc” and “Bcc” – If any.
- 22.5. Click the button “Send”.

**Note:** You can edit or add the body text of the email. You can remove or add the attached files.

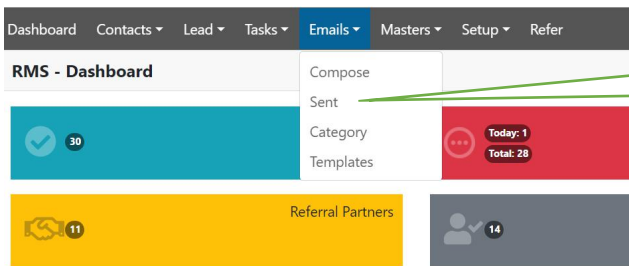
22.6. Steps to Compose a Customized Email.

- 22.6.1. Select “To” – The Contact name, Email Id, Group Name.
- 22.6.2. Select “Cc” and “Bcc” – If any.
- 22.6.3. Enter “Subject” of the Email.
- 22.6.4. Insert First Name and Last Name from the “Select” dropdown.
- 22.6.5. Enter or Copy paste the Body text of the Email.
- 22.6.6. Attach files using “Attach Files” options.
- 22.6.7. Click the button “Send”.

The screenshot displays the 'RMS - Compose Email' interface. At the top, there is a navigation bar with 'Dashboard', 'Contacts', 'Lead', 'Tasks', 'Emails', 'Masters', 'Setup', and 'Refer'. The user's name 'Hiren Acharya' is visible in the top right corner. The main form includes the following fields and components:

- Template:** A dropdown menu set to 'Thinkinno Introduction'. A 'Category' field is set to 'Business Regular Emails'.
- From:** 'hiren.acharya@thinkinno.com'
- To:** 'Select Some Options'
- Lead:** 'Select Lead...'
- Cc:** 'Select Some Options'
- Bcc:** 'Select Some Options'
- Subject:** 'Introduction - Thinkinno Technologies'
- Insert:** A dropdown menu set to 'Select'.
- Attach Files:** A button with a paperclip icon.
- Rich Text Editor:** A toolbar with options for File, Edit, Insert, View, Format, Table, and Tools. The body text starts with 'Dear <First Name> <Last Name>,' followed by a paragraph about Thinkinno Technologies.

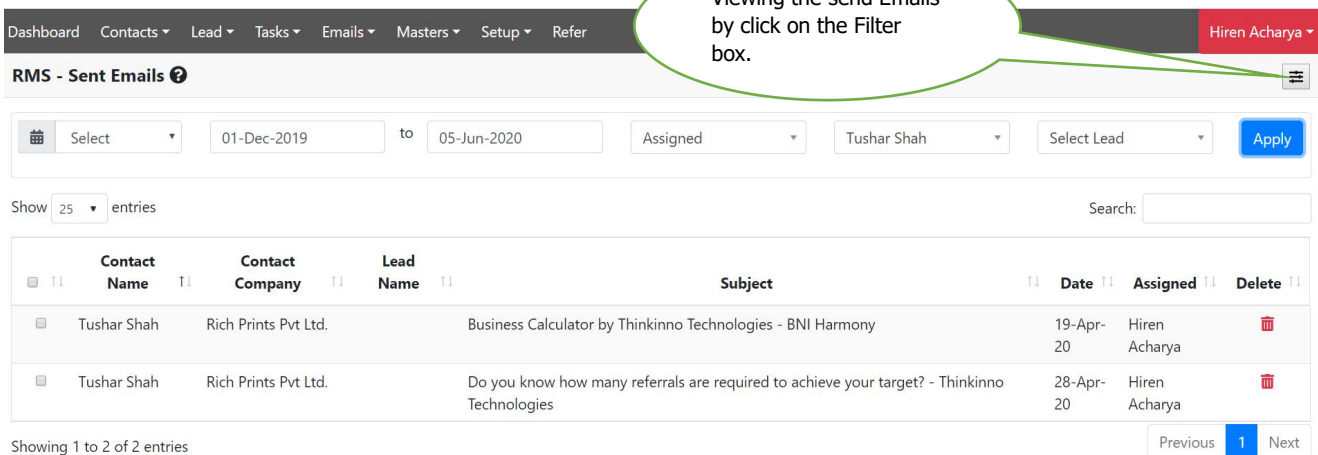
### 23. How to View the Sent Emails.



Click on the "Emails" menu and select the "Send" option.

#### 23.1. Points to view the Sent mails applying Filters.

- 23.1.1. Mails can be viewed for last 30, 60 and 90 Days.
- 23.1.2. Mails can be viewed by selecting "From" and "To" date range.
- 23.1.3. Mails issued by various user can be viewed by selecting the "Assigned" dropdown.
- 23.1.4. Mails can be viewed for a particular contact by selecting the "Contact Name" dropdown.



Viewing the send Emails by click on the Filter box.

## 24. View Send Mails Applying various Filters.

### 24.1. View Mails for last 30, 60 or 90 days emails.

Dashboard Contacts Leads Tasks Emails Masters Setup Refer Hiren Acharya

**Emails - Sent**

to

Show

	Contact Name	Contact Company	Lead Name	Subject	Date	Assigned	Delete
<input type="checkbox"/>	Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	RMS Subscription Offer - Thinkinno Technologies	13-Apr-20	Hiren Acharya	<input type="button" value="Delete"/>
<input type="checkbox"/>	Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	RMS Subscription Offer Response - Thinkinno Technologies	15-Apr-20	Hiren Acharya	<input type="button" value="Delete"/>
<input type="checkbox"/>	Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	Get Well soon Wish - Thinkinno Technologies	15-Apr-20	Hiren Acharya	<input type="button" value="Delete"/>
<input type="checkbox"/>	Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	Business Calculator by Thinkinno Technologies - BNI Harmony	19-Apr-20	Hiren Acharya	<input type="button" value="Delete"/>
<input type="checkbox"/>	Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	Thinkinno Condolences.	27-Apr-20	Hiren Acharya	<input type="button" value="Delete"/>

Showing 1 to 5 of 5 entries Previous **1** Next

### 24.2. View Mails applying Date range.

Dashboard Contacts Leads Tasks Emails Masters Setup Refer Hiren Acharya

**Emails - Sent**

to

Show  entries

March 2020

23	24	25	26	27	28	29
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

	Contact Name	Contact Company	Lead Name	Subject	Date	Assigned	Delete
<input type="checkbox"/>	Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	RMS Subscription Offer - Thinkinno Technologies	13-Apr-20	Hiren Acharya	<input type="button" value="Delete"/>
<input type="checkbox"/>	Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	RMS Subscription Offer Response - Thinkinno Technologies	15-Apr-20	Hiren Acharya	<input type="button" value="Delete"/>
<input type="checkbox"/>	Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	Get Well soon Wish - Thinkinno Technologies	15-Apr-20	Hiren Acharya	<input type="button" value="Delete"/>
<input type="checkbox"/>	Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	Business Calculator by Thinkinno Technologies - BNI Harmony	19-Apr-20	Hiren Acharya	<input type="button" value="Delete"/>
<input type="checkbox"/>	Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	Thinkinno Condolences.	27-Apr-20	Hiren Acharya	<input type="button" value="Delete"/>

Showing 1 to 5 of 5 entries Previous **1** Next

### 24.3. View Mails Send by the Users.

Dashboard Contacts Leads Tasks Emails Masters Setup Refer Hiren Acharya

**Emails - Sent**

to

Show  entries

Assigned

- Assigned
- Hiren Acharya
- Rahul Jaiswal

	Contact Name	Contact Company	Lead Name	Subject	Date	Assigned	Delete
<input type="checkbox"/>	Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	RMS Subscription Offer - Thinkinno Technologies	13-Apr-20	Hiren Acharya	<input type="button" value="Delete"/>
<input type="checkbox"/>	Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	RMS Subscription Offer Response - Thinkinno Technologies	15-Apr-20	Hiren Acharya	<input type="button" value="Delete"/>
<input type="checkbox"/>	Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	Get Well soon Wish - Thinkinno Technologies	15-Apr-20	Hiren Acharya	<input type="button" value="Delete"/>
<input type="checkbox"/>	Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	Business Calculator by Thinkinno Technologies - BNI Harmony	19-Apr-20	Hiren Acharya	<input type="button" value="Delete"/>
<input type="checkbox"/>	Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	Thinkinno Condolences.	27-Apr-20	Hiren Acharya	<input type="button" value="Delete"/>

Showing 1 to 5 of 5 entries Previous **1** Next



## 24.4. [View Mails send to one Contact.](#)

Dashboard Contacts Leads Tasks Emails Masters Setup Refer Hiren Acharya

**Emails - Sent**

Past 90 days 21-Mar-2020 to 19-Jun-2020 Assigned Manoj Rijhwaani Lead Name Apply

Show 25 entries

Contact Name	Contact Company	Lead Name	Subject	Date	Assigned	Delete
Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	RMS Subscription Offer - Thinkinno Techno	13-Apr-20	Hiren Acharya	
Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	RMS Subscription Offer Response - Thinkinno	15-Apr-20	Hiren Acharya	
Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	Get Well soon Wish - Thinkinno Technolog	15-Apr-20	Hiren Acharya	
Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	Business Calculator by Thinkinno Technolog	19-Apr-20	Hiren Acharya	
Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	Thinkinno Condolences.	27-Apr-20	Hiren Acharya	

Showing 1 to 5 of 5 entries Previous 1 Next

## 24.5. [View Mails send for the Lead Type.](#)

Dashboard Contacts Leads Tasks Emails Masters Setup Refer Hiren Acharya

**Emails - Sent**

Past 90 days 21-Mar-2020 to 19-Jun-2020 Assigned Manoj Rijhwaani Lead Name Apply

Show 25 entries

Contact Name	Contact Company	Lead Name	Subject	Date	Assigned	Delete
Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	RMS Subscription Offer - Thinkinno Technologies			
Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	RMS Subscription Offer Response - Thinkinno Technologies	15-Apr-20	Hiren Acharya	
Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	Get Well soon Wish - Thinkinno Technologies	15-Apr-20	Hiren Acharya	
Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	Business Calculator by Thinkinno Technologies - BNI Harmony	19-Apr-20	Hiren Acharya	
Manoj Rijhwaani	Consultme Financial Services	RMS Online Demo	Thinkinno Condolences.	27-Apr-20	Hiren Acharya	

Showing 1 to 5 of 5 entries Previous 1 Next

## 25. [Setting up Email Signature.](#)

Dashboard Contacts Lead Tasks Emails Masters Setup Refer

**RMS - Dashboard**

Company  
Email Signature

Active Leads 29

Today: 1  
Total: 32

Click on the "Setup" menu and select the "Email Signature" option.

## 26. [Setting up Email Signature screen has three options, setup is as follows.](#)

### 26.1. [Steps to Add an Email ID.](#)

26.1.1. Select the Domain of your email ID from the dropdown, i.e. Google, Yahoo, Hotmail.



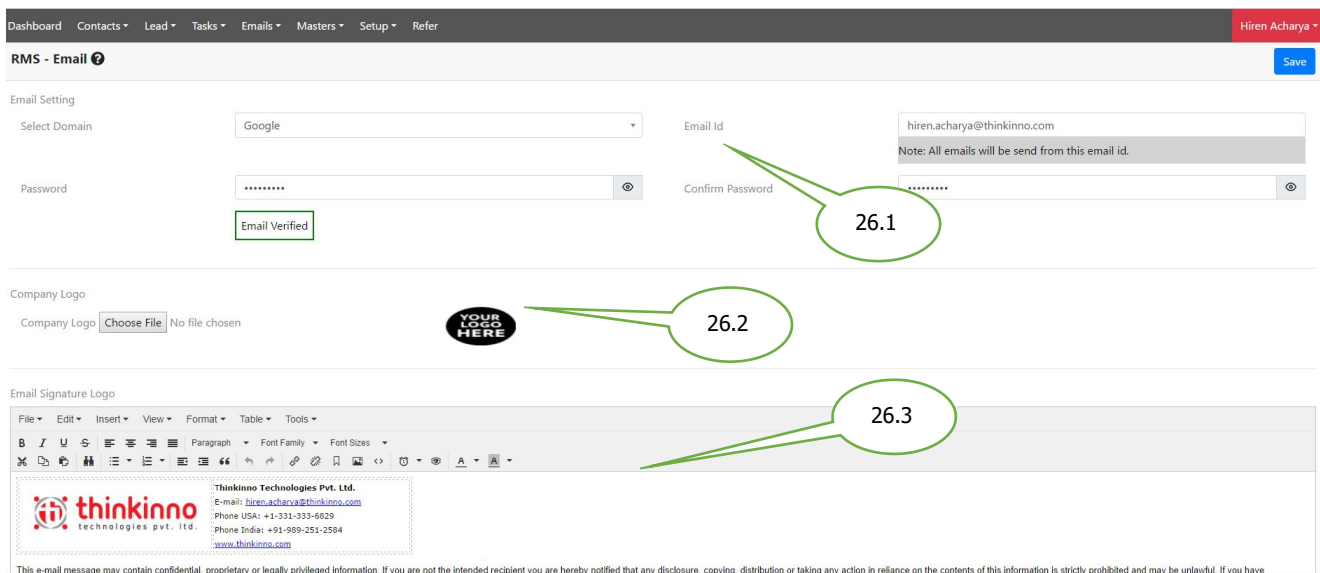
- 26.1.2. Add Email ID for the use to send the Emails.
- 26.1.3. Enter Password
- 26.1.4. Enter Confirm Password.
- 26.1.5. Note: Both the passwords should match each other.
- 26.1.6. Once you “Save” the Email ID settings you will receive the verification email in your email id mailbox.
- 26.1.7. Click on the link from the email send to you email id to login the APPLICATION application.
- 26.1.8. You can view the message “Email Verified” by again selecting the Setup menu and “Email Signature” option.

## 26.2. To Update the Company Logo.

- 26.2.1. Click on the “Choose File” button to select the Graphic Logo File.
- 26.2.2. You can view your company logo on the top right corner of the screen.

## 26.3. To Add an Email Signature.

- 26.3.1. Facility to add a Company Logo in the email signature section.
- 26.3.2. Facility to add the text in the email signature.



Dashboard Contacts ▶ Lead ▶ Tasks ▶ Emails ▶ Masters ▶ Setup ▶ Refer Hiren Acharya

**RMS - Email** Save

Email Setting

Select Domain: Google

Email Id: hiren.acharya@thinkinno.com  
Note: All emails will be send from this email id.

Password: [masked]

Confirm Password: [masked]

26.1

Company Logo

Company Logo: Choose File No file chosen

26.2

Email Signature Logo

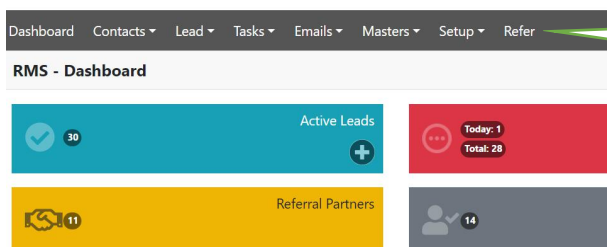
26.3

File Edit Insert View Format Table Tools

thinkinno technologies pvt. ltd.  
Thinkinno Technologies Pvt. Ltd.  
E-mail: hiren.acharya@thinkinno.com  
Phone USA: +1-331-333-6829  
Phone India: +91-989-251-2584  
www.thinkinno.com

This e-mail message may contain confidential, proprietary or legally privileged information. If you are not the intended recipient you are hereby notified that any disclosure, copying, distribution or taking any action in reliance on the contents of this information is strictly prohibited and may be unlawful. If you have

## 27. Referring to the new Prospect.



Dashboard Contacts ▶ Lead ▶ Tasks ▶ Emails ▶ Masters ▶ Setup ▶ Refer

**RMS - Dashboard**

Active Leads: 30

Referral Partners: 11

Today: 1 Total: 28

14

Click on the  
“Refer” option  
from the menu  
bar.

27.1. Steps to refer a new Prospect.

27.1.1. Select the Contact name or email to whom you want to refer in the “To” selection.

27.1.2. Click on the “Send” button.

Dashboard Contacts ▾ Lead ▾ Tasks ▾ Emails ▾ Masters ▾ Setup ▾ Refer Hiren Acharya ▾

**RMS - Refer** Cancel Send

From: hiren.acharya@thinkinno.com

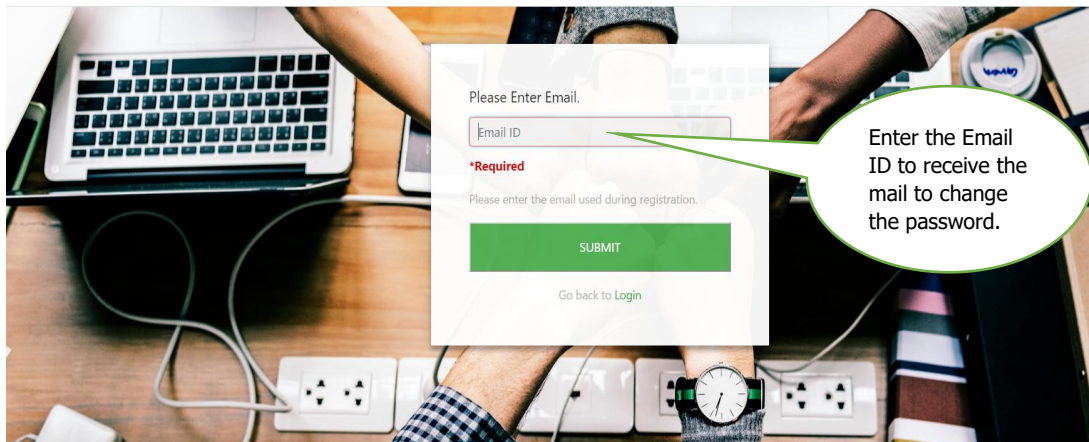
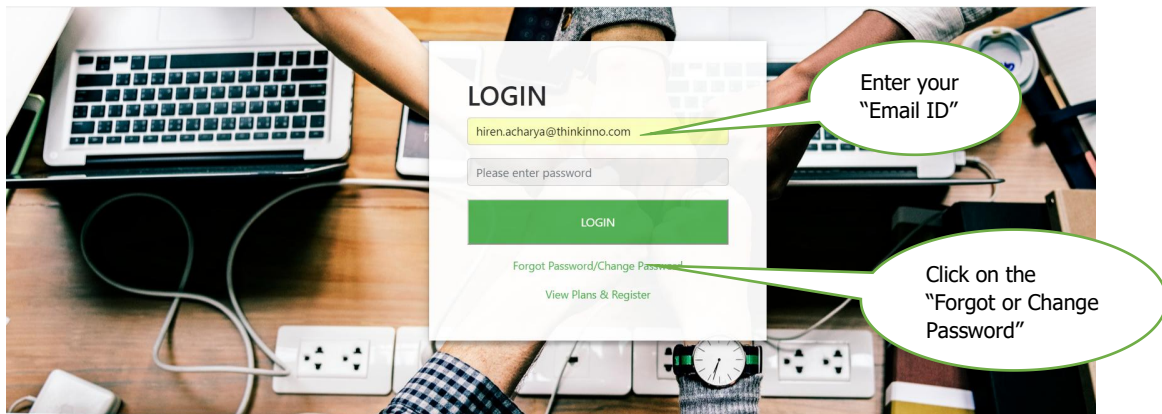
To: Select Some Options

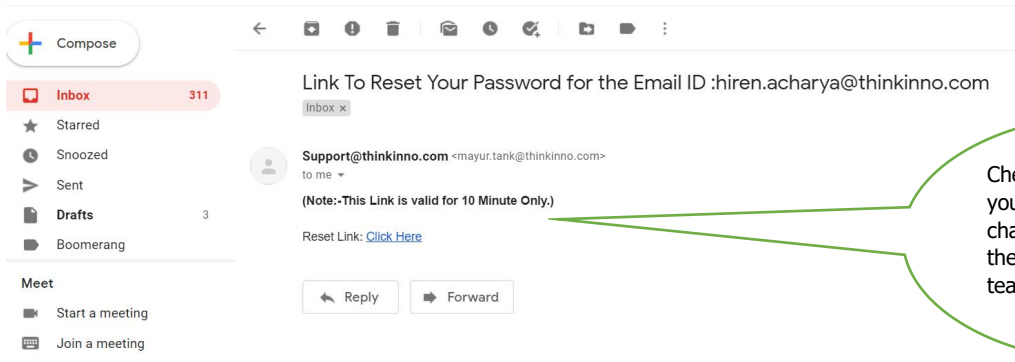
Subject: Referring you RMS - Referral Management System

Hi,  
I'm glad to share with you a smart app that will help you to manage the leads and monitor actions performed on those leads. You can create standard tasks for every lead. I would suggest you to subscribe for the same.  
Enter my phone number **9892512584** in the referrer phone number during registration.  
[Click for more information](#)

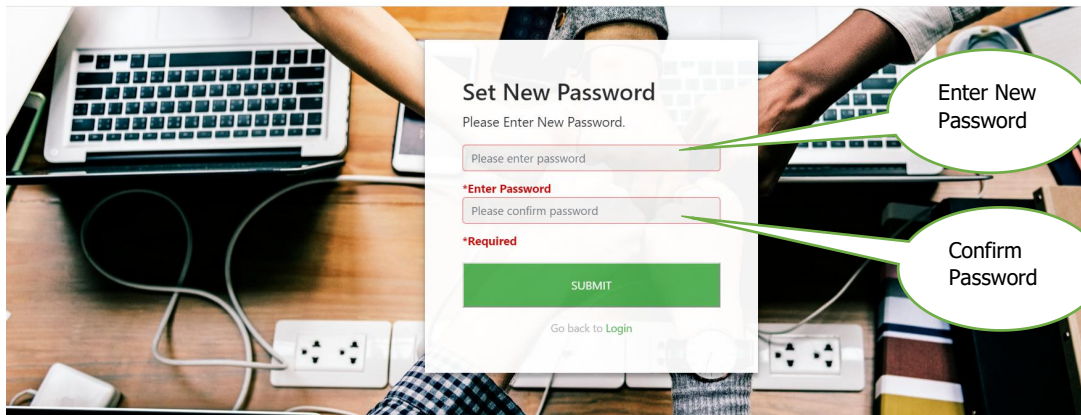
**Best Regards,**  
**Hiren Acharya**

28. Change or Forgot Password step by step.





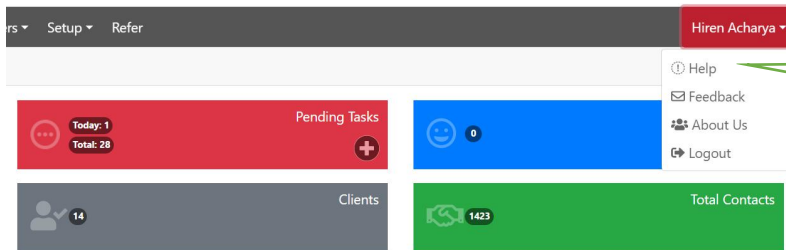
Check your Email ID inbox you will find the invite to change your password from the "Support@thinkinno" team.



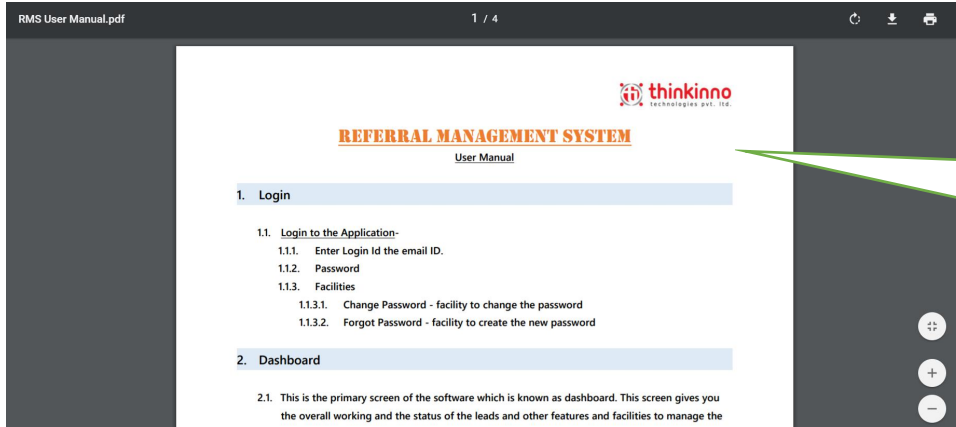
Enter New Password

Confirm Password

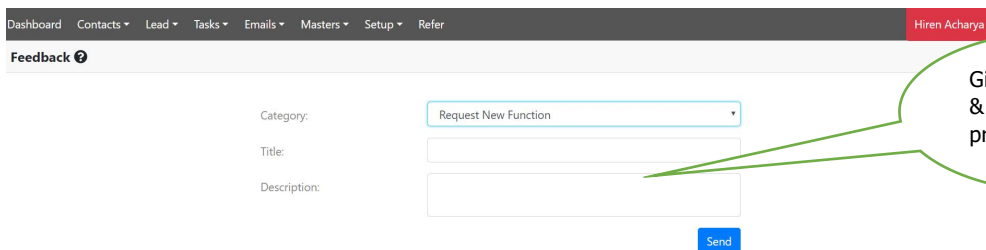
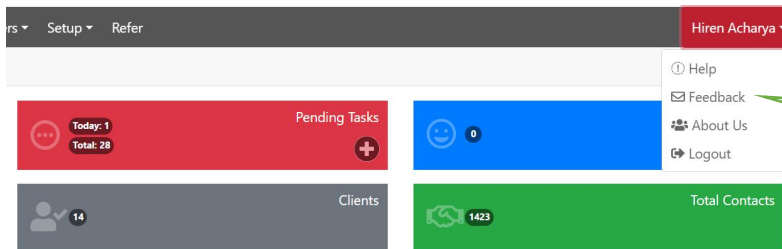
## 29. How to find the Help?



Click on the "Help" Option to view the APPLICATION



### 30. How to give a Feedback and Suggestions?



### 31. Where to write for the Query?

Email ID – support@thinkinno.com