



RDP GeM CRM User Guide





RDP.



Most Affordable



High Quality



On-Time Support









Confidential

Shared Under NDA







Presentation Updates Tracking



Update No	Slide No's	Updated Date
01	1-30	10th Sep'21
02		
03		
04		
05		







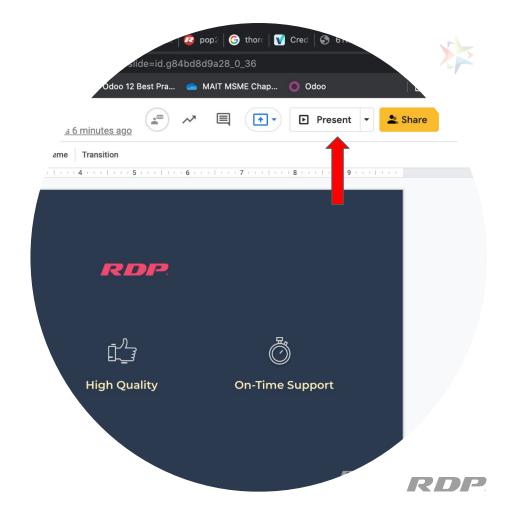




See in 'Presentation' mode

- Press the 'Present' button to see this presentation in presentation mode for better view.
- As we have used small size fonts / small screenshots.
- Press enter to move to next slide.













Welcome to RDP GeM CRM User Guide



- 1. Understand this **User Guide** thoroughly to grow your business **5 times** in GeM by using GeM CRM.
- 2. Save your time Become **5X** productive in participating 100's of GeM Bids.
- 3. Make meaningful insights thru various reports !!!
- 4. Every **15 days*** we are taking feedback from partners & adding new features in CRM & updating the same in this user guide.
- 5. Please visit this user guide every month **2nd** & **16th** to discover the new features.







Salient features of GeM CRM



- Get 10's of bids everyday (based on your preference)
- Along with CatalogID, MAF & Price (no need to chase OEM)
- You get all the above details at least 5-7 days before to bid closing date & time.
- Reports (bids participated, priority, L1, contract received etc)
- You can create support tickets & track the status (in real time)













Pay for one user & use by everyone in the organization



- 1. GeM CRM has multi user login function.
- 2. With the same user id & password any number of employees/management in the organization can login at the same time.
- 3. Bidding team will update the participated/L1/Contract status and the sales manager can see reports.













GeM CRM is not FREE... you need a monthly active subscription



- 1. Monthly subscription fee is Rs.4999/- (Incl tax).
- 2. It's a ERP per user license cost.
- 3. Can't be done without ERP?
- 4. It's impossible for OEM & partner to manage the entire bid life cycle (bid capture/ bid share/ participate/ contract received/ PO to distributor/ PO execution/ delivery/ 3 year warranty management)
- 5. Especially when sales model is Back2Back order execution. (for stock n sale model may be possible)









How to get GeM CRM User ID & Password



- RDP GeM CRM access will be given to only for GeM Registered Partners (RP's)
- Partner registration process starts from www.rdp.in/pop2 (GeM partner registration form).
- 3. Upon the partner registration is successful, we'll share OEM Authorization code to RP.
- Along with the OEM authorization code, we'll also share link for monthly GeM CRM subscription package. (first 30 days is free)
- Once you buy the GeM CRM subscription package then you'll receive the mail from our ERP to active your user ID & pwd (shown in the next slide)

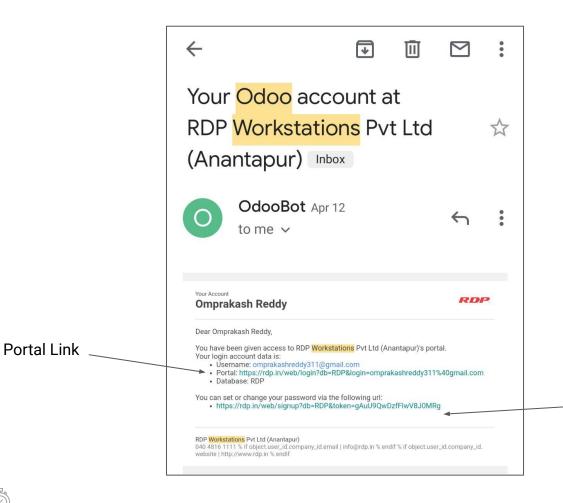


























How to Login to RDP GeM CRM



- Visit <u>www.rdp.in</u>
- 2. Select 'Sign In' at the top right.
- 3. Login with your user id & pwd.
- 4. Once you sign in you'll see 'Your Documents' page. (see next slide)
- 5. If you are not able to login then you can choose the 'forgot password' option while sign in, you'll get fresh email for password change (note: use the same email ID which you bought GeM CRM subscription pack)







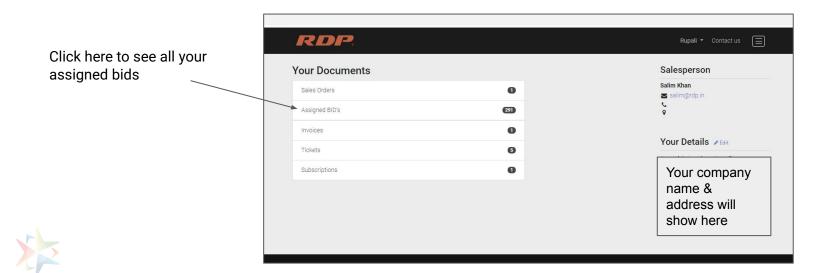






Screen 1: Your Documents page

This is 'Home page' of GeM CRM, from this page you can access all your documents (Assigned BIDs, support tickets etc)













GeM CRM has Only 3 Pages (aka 3 Screens)



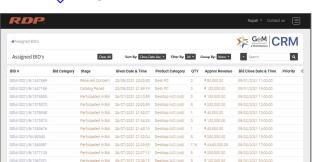
GeM CRM



Your Documents page

(or) Home page

List View page (or) Reports page Page 2





#Assigned BID's / GEM/2021/8/137894

> Bid Details page (or) Form view Page 3





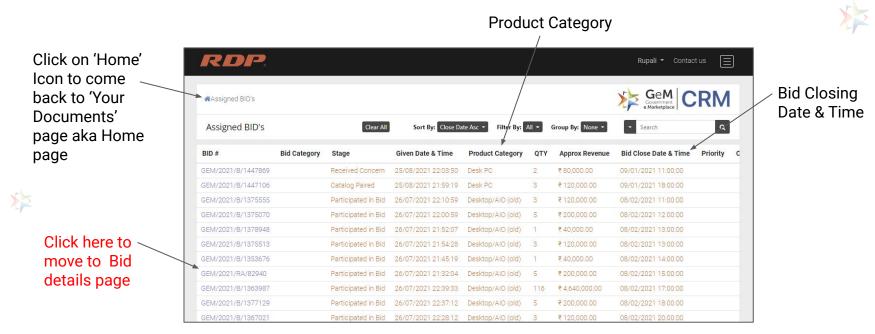


Page 1



Screen 2: List view page

In this page you can see the entire list of bids shared by RDP, you can use **Sort By**, **Filter By**, **Group By** with various dropdown parameters to generate reports !!!











GeM CRM: List View Column Headings & Descriptions



Column Heading	Description / Values
BID #	Exact GeM Bid number
Bid Category	Product Category Specific/Bunch/BOQ/Custom/PAC
Stage	Current bid stage (Catalog paired/Participated/L1)
Given Date & Time	On which date respective bid has given by RDP to partner
Product Category	Desktop/AIO/Thin Client/Micro PC/Server/Workstation
Qty	Quantity of the respective bid
Approx Revenue	Estimated Revenue (we are taking ASP as 40K)







GeM CRM: List View Column Headings & Descriptions



Bid Close Date & Time	Bid closing date & time as per the bid.
Priority	Partner can assign respective star (one/two/three) based on his priority level to work on this bid (one star is low priority) (partner can filter based on priority).
Catalog Paired	If partner has paired respective catalog to participate in bid then partner can move to catalog paired stage to filter in reports.
Participated	Update bid status to 'Participate' to filter in reports.
L1	Update bid status to 'L1' to filter in reports.
Contract Recvd	Update bid status to 'Contract Recvd' to filter in reports.
Lost	Update bid status to 'Lost' it'll disappear from reports.





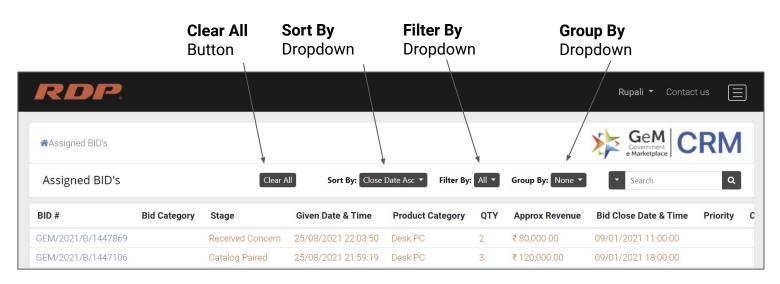




Screen 2: Dynamic reports in List view thru Sort/Filter/Group By values !!!

'Clear All' before you apply any of the Sort/Filter/Group by values to generate reports.















Sort By Dropdown *Values*:



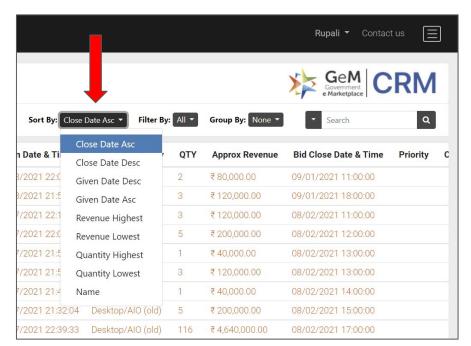
Close Date Asc/Desc: Sort Bids based on 'Close Date Ascending' or 'Descending' Order

Given Date Asc/Desc: Sort Bids based on 'Given Date Ascending or Descending order

Revenue Highest/Lowest: Sort Bids based on 'Highest/Lowest Revenue'

Quantity Highest/Lowest: Sort Bids based on 'Highest/Lowest Quantity'









Filter By Dropdown Values:

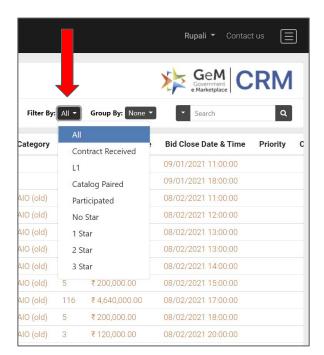


You can filter the Bids based on the below filter values

Catalog Paired, Participated, L1, Contract Received, No Star, Star, 2 Star, 3 Star

Note: you must have assigned the respective bid stage (or) priority level to respective bids















Group By Dropdown Values:

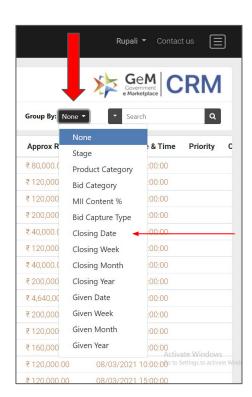


You can group the Bids based on the below values

Stage, Product Category, Bid Category, MII Content %, Bid Capture Type, Closing Date, Closing Week, Closing Month, Closing Year, Given Date, Given Week

Tip: Group By 'Closing Date' is the HOT FEATURE, will group the Bids based on closing date, so you can plan your bid participation priorities.













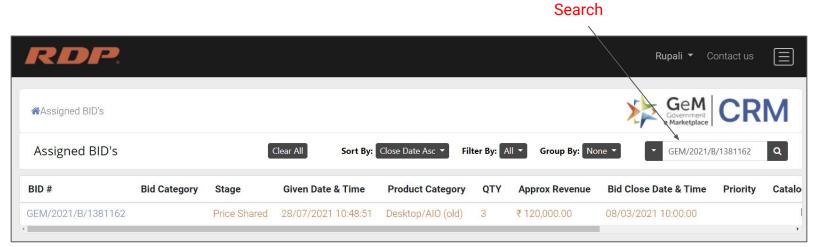


Search:

'Search' just type/paste the Bid number and find it instantly !!! .









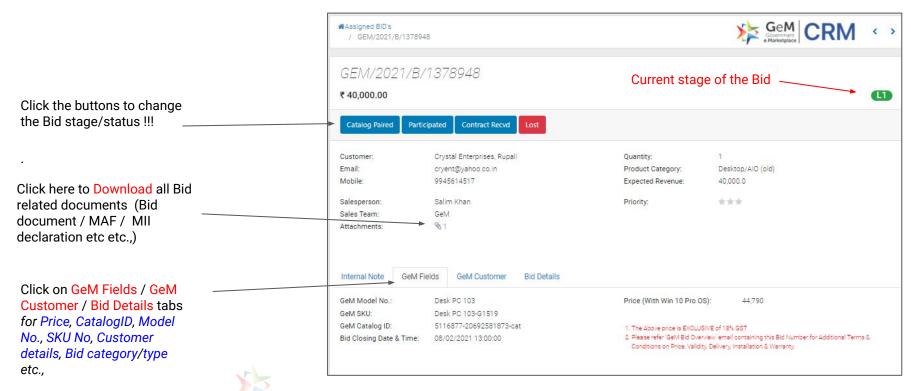






Screen 3: Bid details page











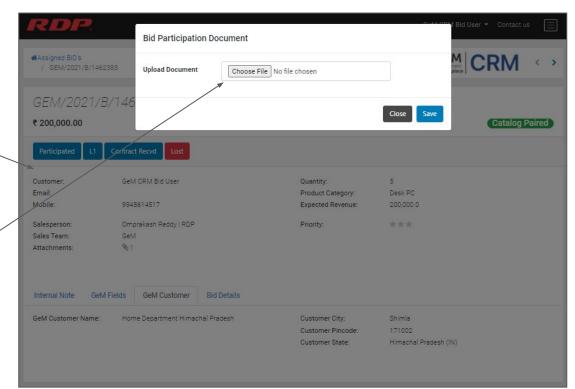


Please attach 'Bid Participation Document'



Once you participate in Bid, move the respective bid to 'Participated' stage. By clicking on the button

It is mandatory to attach 'Bid Participation Document' to move to this stage !!!







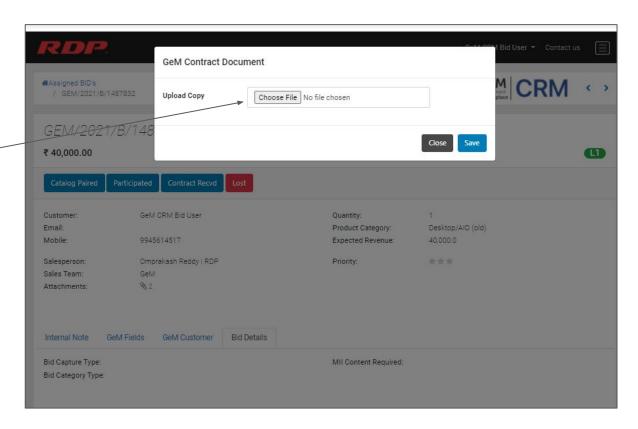


Please attach GeM 'Contract' Document



Once you receive the Contract copy please click on "Contract Received" button and attach the Contract !!!

To start the order processing...











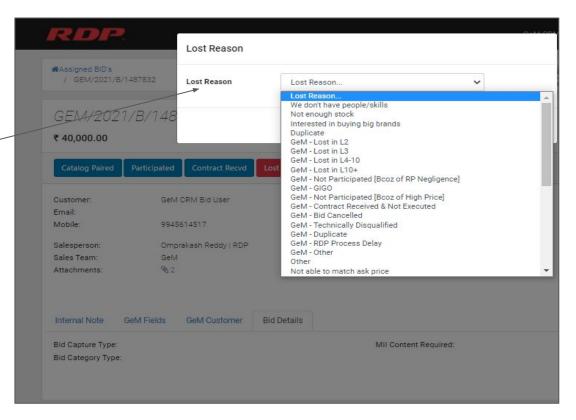


Please select the Lost reason



If you have Lost the Bid, click on 'Lost' button to move it to the Lost stage and select the Lost Reason from the dropdown.













Bids List View in Blue & Red Color



Bid lines will show in Red Color to indicate bid participation date & time is over.



Bid lines will show in Blue Color to indicate bid participation closing day is today.

★Assigned BID's							GeM CF	
Assigned BID's		Clea	r All Sort By: Clo	se Date Asc • Filter	By: All -	Group By: None	- Search	
BID #	Bid Category	Stage	Given Date & Time	Product Category	QTY	Approx Revenue	Bid Close Date & Time	Priorit
GEM/2021/B/1449624		Catalog Paired	24/08/2021 20:00:20	Desk PC	1	₹ 40,000.00	31/08/2021 17:00:00	
GEM/2021/B/1387273		Catalog Paired	02/08/2021 22:44:07	Desktop/AIO (old)	1	₹ 40,000.00	08/09/2021 12:00:00	
GEM/2021/B/1394897		Price Shared	02/08/2021 23:29:40	Desktop/AIO (old)	1	₹ 40,000.00	08/09/2021 15:00:00	
GEM/2021/B/1398781	-	Price Shared	02/08/2021 23:52:19	Desktop/AIO (old)	10	₹ 400,000.00	08/09/2021 16:00:00	
GEM/2021/B/1398858		Price Shared	02/08/2021 23:55:54	Desktop/AIO (old)	26	₹ 1,040,000.00	08/09/2021 16:00:00	
GEM/2021/B/1390062		Price Shared	02/08/2021 22:54:33	Desktop/AIO (old)	10	₹ 400,000.00	08/09/2021 17:00:00	
GEM/2021/B/1400033		Price Shared	02/08/2021 23:59:15	Desktop/AIO (old)	6	₹ 240,000.00	08/09/2021 17:00:00	
GEM/2021/B/1404384		Price Shared	03/08/2021 00:01:46	Desktop/AIO (old)	6	₹ 240,000.00	08/09/2021 17:00:00	
GEM/2021/B/1447106		Price Shared	02/09/2021 22:09:49	Desk PC	3	₹ 120,000.00	09/09/2021 10:00:00	
GEM/2021/B/1424758		Waiting for Price	02/09/2021 22:01:19	Servers (old)	3	₹ 120,000.00	09/09/2021 13:00:00	
GEM/2021/B/1415540		Waiting for Price	02/09/2021 21:59:07	Desktop/AIO (old)	12	₹ 480,000.00	09/09/2021 14:00:00	
GEM/2021/B/1455134		Waiting for Price	02/09/2021 22:20:58	Desktop/AIO (old)	3	₹ 120,000.00	09/09/2021 15:00:00	
GEM/2021/B/1466091	—	Price Shared	02/09/2021 22:26:10	Desk PC	40	₹ 1,600,000.00	09/09/2021 15:00:00	
GEM/2021/B/1473550		Waiting for Price	02/09/2021 22:09:04	Servers (old)	2	₹80,000.00	09/09/2021 18:00:00	
GEM/2021/B/1469529		Price Shared	02/09/2021 22:14:12	Desk PC	5	₹200,000.00	09/09/2021 18:00:00	
GEM/2021/B/1474031		Waiting for Price	02/09/2021 21:46:11	Desktop/AIO (old)	5	₹ 200,000.00	09/09/2021 19:00:00	
GEM/2021/RA/87595		Waiting for Price	06/09/2021 21:21:19	Sprint	1	₹ 40.000.00	13/09/2021 11:00:00	



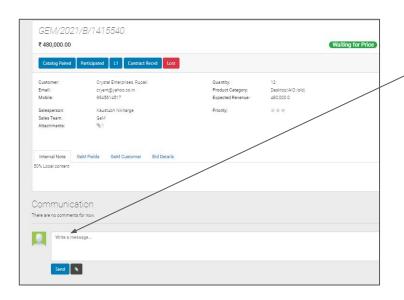






Bid related communication





- Any additional documentation request related to
- Price negotiations
- or any kind of communication related to this bid with RDP

Please request thru this window only & you'll get reply also thru this lognote only !!!







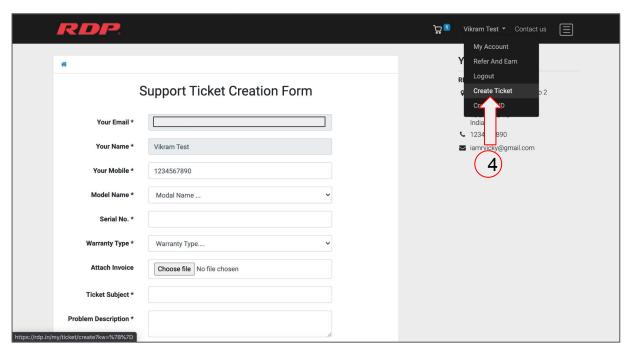




Create Support Ticket



- (1) Write your support request to support@rdp.in
- (2) Fill your support request thru www.rdp.in/contactus
- (3) You can call to 040-48161111 (10 am to 6 pm) (Mon-Sat)
- (4) Create Ticket thru this CRM & track in a real time



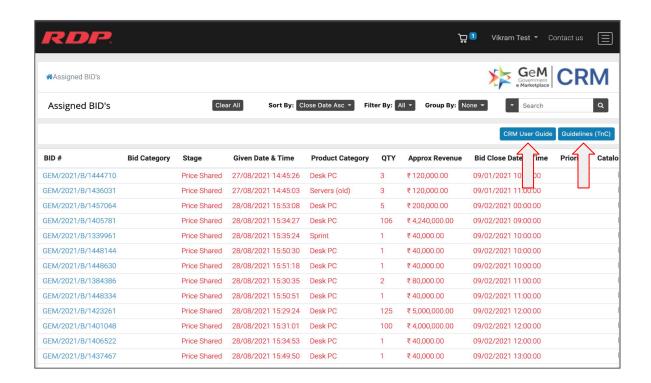








CRM User Guide | RDP GeM Guidelines (TnC) to Partners PPTs









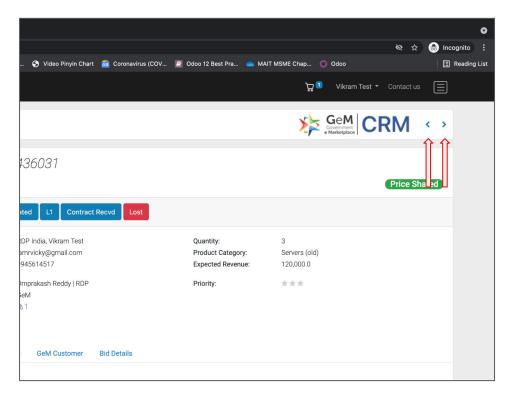






















Support Ticket Page

RDP Omprakash Reddy | RDP - Contact us Your Details Fedit Your Documents Omprakash Reddy | RDP 0 Ouotations · 09381743549 29 Sales Orders a ecom@rdp.in 1660 Purchase Orders 4813 Invoices 12 Projects Tasks 381 Assigned Tickets 10018

All your Support Tickets you can see in this tab.

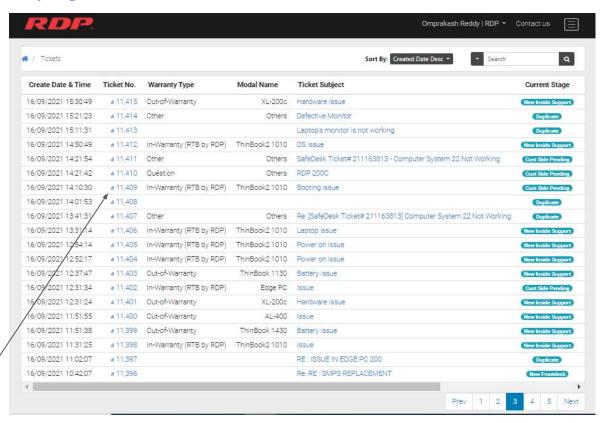








List view page of Support Ticket page



Once you click on Assigned tickets you can see all the ticket details in this page with their current status.

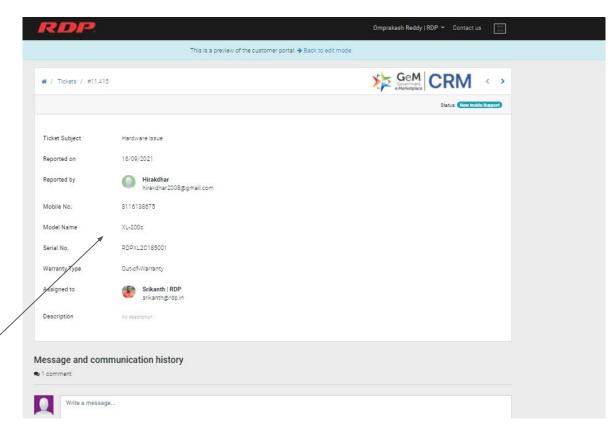








Status of your Ticket



If you want check the specific ticket status click on that particular ticket and you can track the all details in the chatter.







