User Manual

Document Version: C2C-UM.V.1

Release Date: 8th Jan'2024

Disclaimer:

Index

Objectives

The goals of this document are to:

(1) Provide understanding to end users abouts functions and utilities available in the application (www.click2confirm.com).

(2) Provide detailed understanding to users on how to use the application (www.click2confirm.com).

(3) Make users familiar with minimum requirements of the application and details & inputs required from user end.

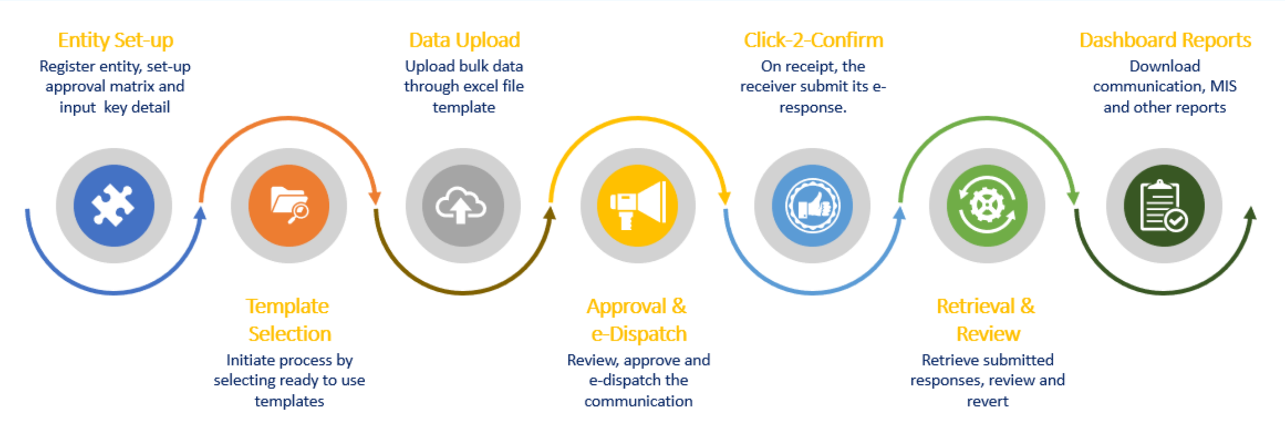
(4) Make aware about restrictions placed in the application w.r.t. use, data and validations.

About Click2Confirm

Click2Confirm, a web-based application, providing new edge technology solution to make business communications GO DIGITAL, EASY and EFFECTIVE. Moving from traditional ways of ensuring accounting, statutory compliances & internal controls, it's time for Digital Solution.

Click2Confirm, a SaaS based Application, is made for businesses to communicate with Vendors, Customers and Employees in digitally fast manner and to summarize results intelligently. This is a cloud-based application tool to provide users with standard templates to start communication flow within few minutes. It's not just about sending digital letters but it also delivers result intelligently in very sophisticated manner for Management and Users. It comes with functionality of 2-way Communication flow, Approvals, Management Dashboard, User Reports, Mass downloads, etc. to meet user's specific and different needs.

With this application, businesses can send routine formal business letters to mass audience digitally, retrieve their replies, track real time status and analyse responses intelligently to have specific results instantly. This will help businesses to go away with lengthy, manual & traditional way of sending posts or emails and then do regress follow-up, unorganized status tracking and result compilation. In today's technology driven world, where time and efforts are more crucial, this application will make efforts productive by automizing non-core activities. Application process flow-



RESULT: Cost and effort efficiencies along with enhanced compliances, accounting & internal controls. Thousands of minutes of paper work and paper could be saved with automation of business communication. By replacing use of physical business letters, we could not only save communication costs, time & efforts but will also help in "Save Paper – Save Tree". Digitization of business communications flow will also bring in process standardization, transparency and ease in ensuring statutory compliances.

Chapter 1: Registration, Login & Initial Setup

Step1: Process start with one time registration of your entity.

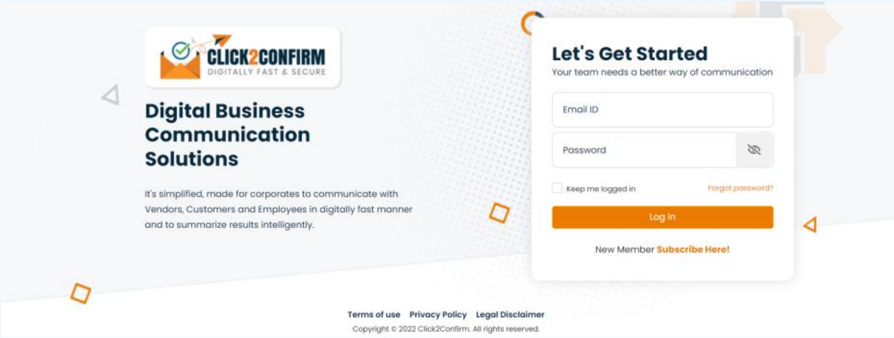
1. Log in to www.click2confirm.com

2. If you are first time user, click to **SIGN UP** option to create your entity account with minimum inputs.

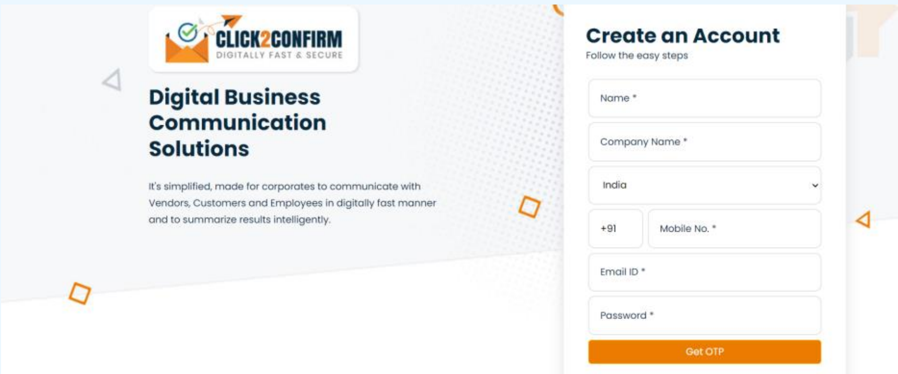
3. If you have already created your account in the application, click on **LOGIN** for signing in.

Step2: Create User Account (for new user)

1. Click to "Subscribe Here".



2. Provide basic information for creation of your entity account with us.



S. No.	Input Field	Input Type	Input Value	Remarks
1	Name	M	Name of admin user	User will be admin user, and have all access of the application.
2	Company Name	M	Complete name of your oragnization	This will be master entity.
3	Country	M	Select country of the entity	By default, value set as “India”.
4	Mobile No.	M	Mobile number of admin user	Mobile number will be verified with OTP in subsequent steps.
5	Email ID (User ID)	M	Email ID of admin user (email will be user ID)	Email ID will be verified with OTP in subsequent steps.
6	Password	M	Input your desired password for login	Password should be of minimum 8 character with 1 upper case and 1 special character.

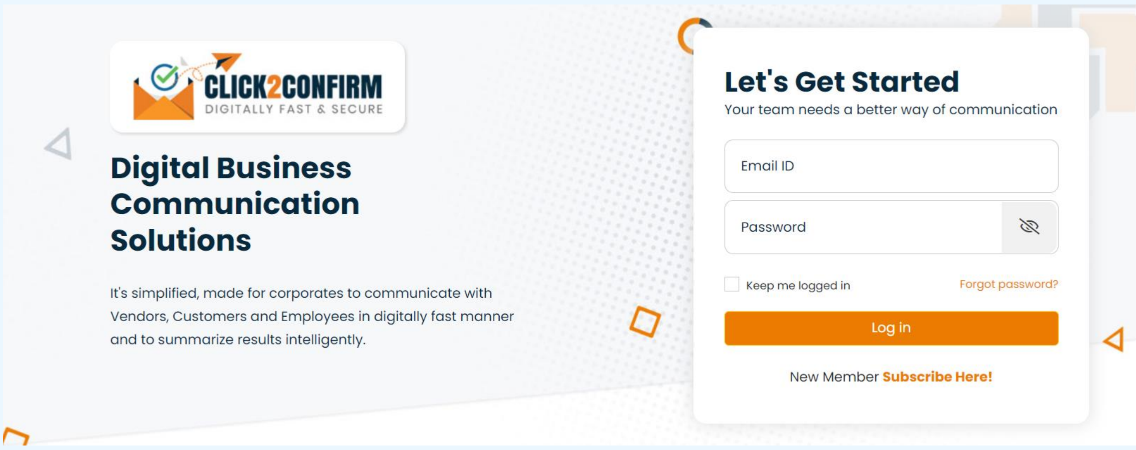
3. Click to GET OTP tab post input of above information. You will receive OTP on given email ID and via SMS on given Mobile number.

4. Input the respective OTP and click “Register Now”. If no issues found on input data provided, your user ID will be created and an email will be sent on email.

5. You may read ‘Terms of Use’, ‘Privacy Policy’ and ‘Legal Disclaimer’ before registration, from links provided at registration tab and also at footer section.

Step 3: Login to application (existing user)

1. If you already registered on the application, Login to application with user ID and Password.



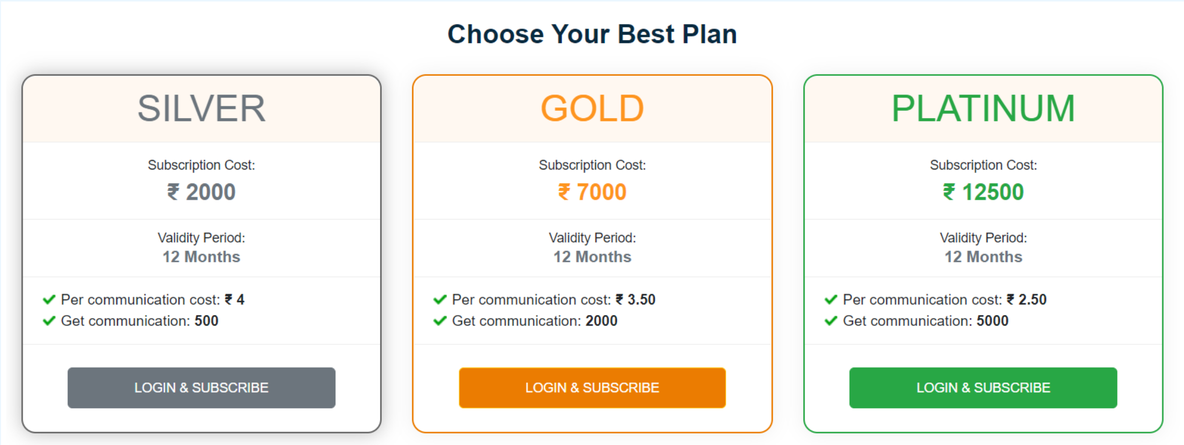
More options:

a. **Keep me logged in:** User has an option to keep sign-in to avoid repeatedly password input.

b. **Forgot Password:** In you have forgotten your password, click “Forgot Password” and input your user ID. An email with reset link will be sent on registered email. Reset the password and continue using digital application.

Step4: Payment after Login:

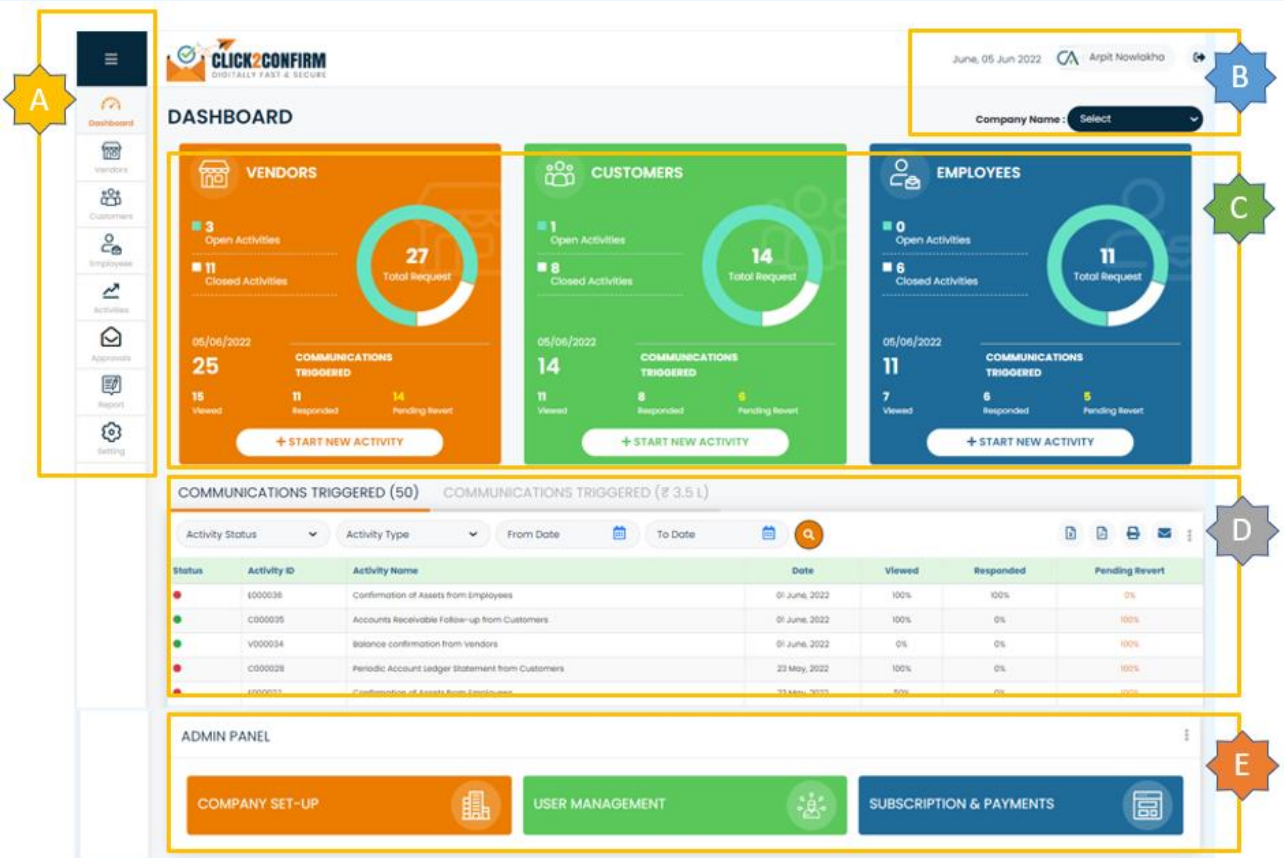
After first time login, subscribe to new age Digital Business Communication Solutions to automate and simplify your business communications, its flexible. Use the best plan that suits your needs-



Once payment is made, communication balance will be credited in your user account and rights will be granted to use the application. Menu section and navigation pane will now be activated for use.

Chapter 2: Know the Dashboard

Dashboard of the application is designed in a way to provide users with easy-to-use interface and key statics for performance analysis. Dashboard is divided into 5 major sections, which are -

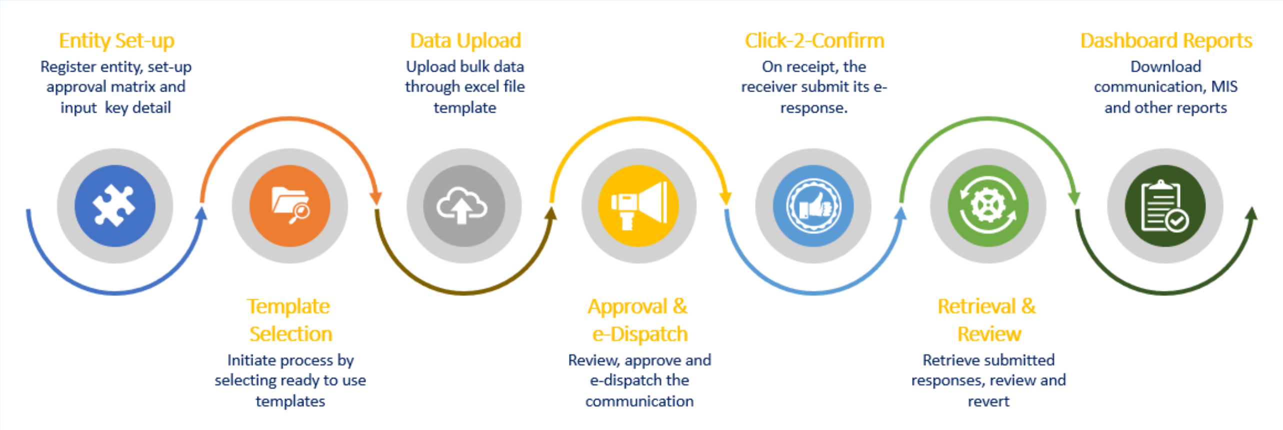


Section wise details -

Section	Description	Sub-Function	Intended Use
A	Menu Section	Dashboard, Vendors, Customers, Employees, Activities, Approvals, Report, Setting	Navigation Tabs for different sections of the application.
B	Header Section/ Information Section	Entity Name	In case of multiple companies within a group, select desired entity to view dashboard reports.
		Logout	User logout tab.
		User Detail and current date	For information only. Update user name and picture from 'Setting' menu.
C	Activity Summary	Vendors, Customers, Employees	Section display summary view of activities triggered from application and their status.
D	Communication Triggered	Communication Triggered (###)	Activity wise status of communication triggered from application with % (based on count of communications)
		Communication Triggered (Rs. ###)	Activity wise status of communication triggered from application with % (based on Amounts involved in communications)
E	Admin Panel *(Refer 'Chapter - 7 Admin Functionalities for more details)*	Company Set-up	Section for admin user to setup entities.
		User Management	Section for admin user to create sub-users and assign roles.
		Subscription & Payment	Section for admin & sub-admin user to track payments, communication balances, follow-ups, invoices, etc.

Chapter 3: Start New Activity (Vendors / Customers / Employees)

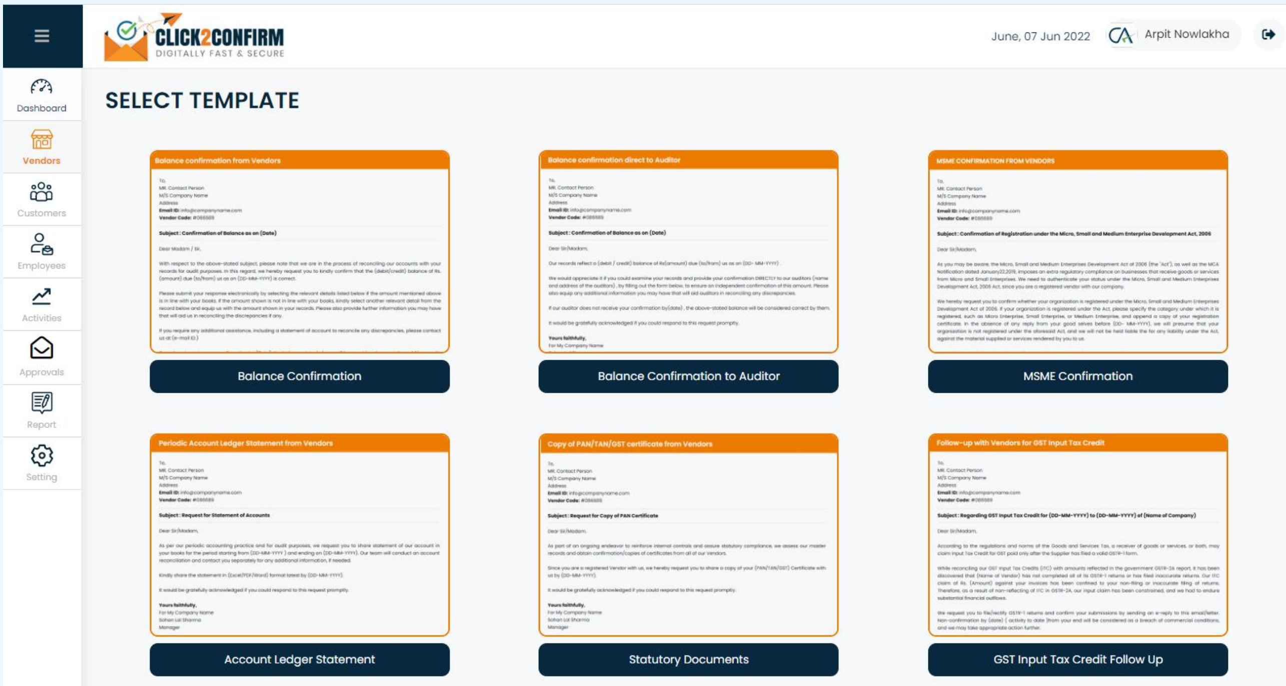
Basic flow of application: Process start with setting up your entity in the application mater data.



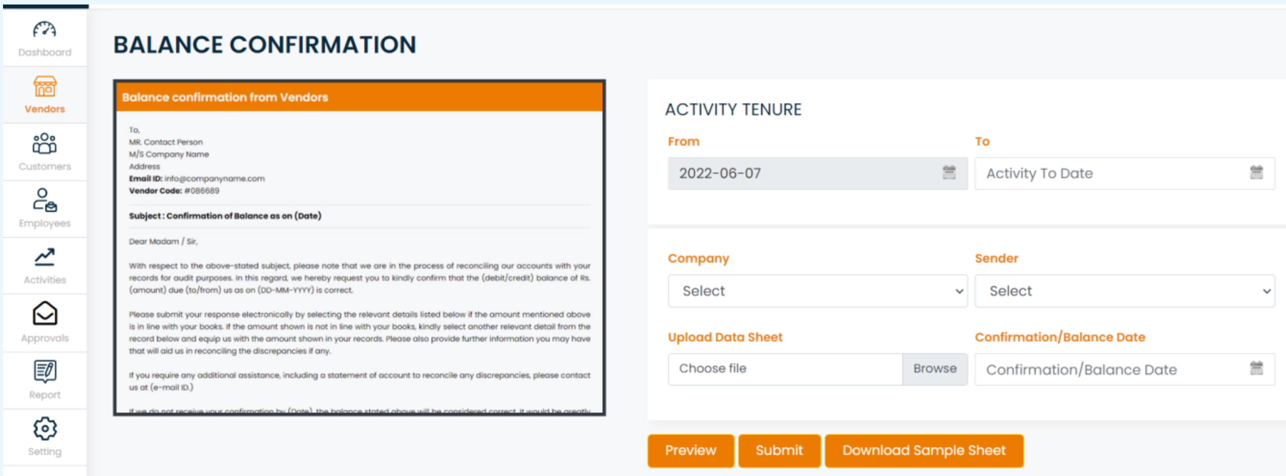
Post creation of entity and users by Admin, you need to select desired template and to provide basic inputs and receiver details for the communication process to start. Once required details are provided, communication trigger to mass receivers via emails. Your receiver now needs to revert with information asked. Track the progress of campaign in activity section, reports sections and at dashboard to have a successful campaign.

How to create a new Activity (Campaign):

Step1: Select the desired communication activity from Vendors / Customers / Employees section.



Step2: Provide onscreen inputs like end date of activity, sending entity, sender name, etc.



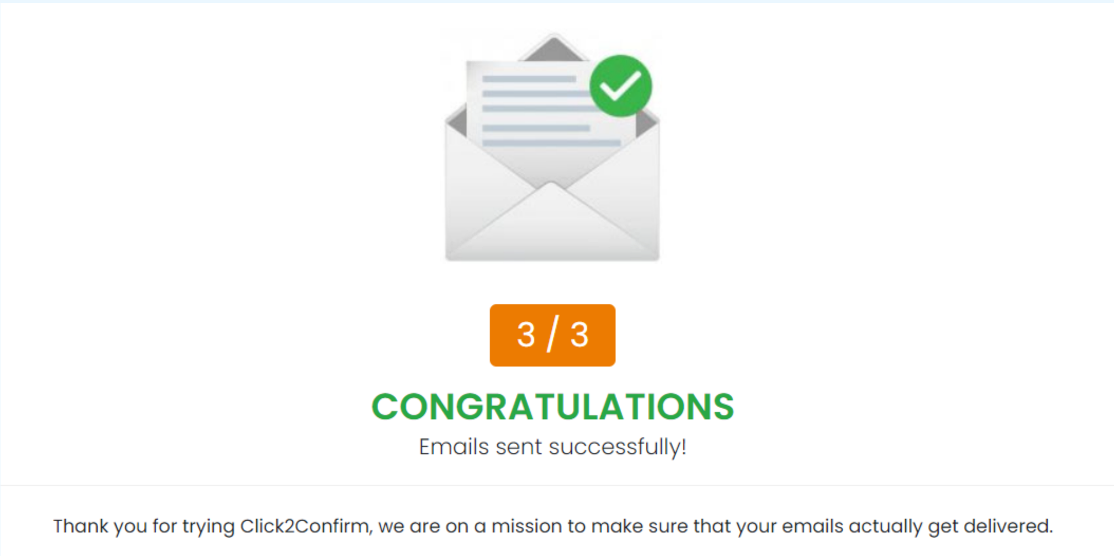
Step3: Upload activity receiver's data (your vendor or customer or employees) in excel format. Download excel data template from tab "Download Sample Sheet" from each of the activity page.

Note: Excel template format is different for each of the activity template.

Step4: Preview one sample letter created based on onscreen and excel input provided. You may take print out or save as PDF the preview letter from onscreen option available.

Note: Preview will be available only for first line item of excel uploaded data.

Step5: Post preview of sample letter, click on 'Submit' button to approve & send campaign to all receivers. On submission, activity email sending task shall start in backend and this may take some time depending on number of communications included in the activity.



More Features:

1. **Two-way Approval:** In case two-way approval option is selected by Admin User in entity master data, instead of 'Submit' button, 'Send for Approval' button will appear. Once user click on 'Send for Approval' campaign will be sent to 'Manager' for review and approval.

   Communication emails will trigger once activity is approved by the Manager.

2. **Error in Excel Data:** If any error is found in uploaded excel data or onscreen inputs, error message will be displayed on screen along with lineitem detail. User need to correct the excel errors and upload the excel file again.

   Note: Till the time all errors are not resolved, activity shall not be processed and no communication (email) will trigger.

Template specific User Manual: Refer seprate document "More About Templates" for template wise use and inputs required.

Chapter 4: Activity Section

Once a activity is created, same can be tracked and managed from this Activity section. This section not only provides information on progress of the campaign but also give option to send follow-ups for pending responses, pre-close any campaign, reopen closed campaign to allow submission of responses even after end date of campaign, view and download letters sent & received, etc.

Following are the functions/utility available at Activity page:

A. Activity Status: Column **Response (%)** shows status of Activity as "Open" or "Closed" along with % of responses received.

B. View Letters: for detailed vendor/customer/employee wise status of the activity, click to activity name, a separate window page will open with the details.

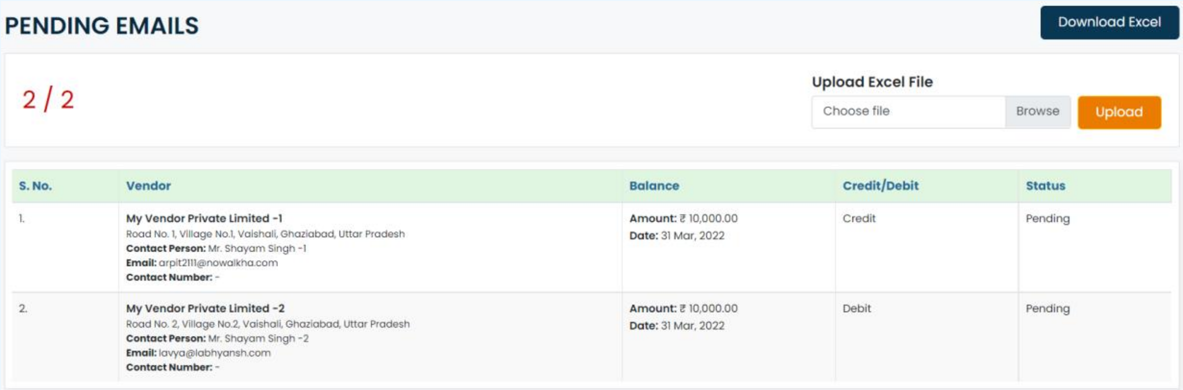
C. Pre-close function: Activity can be closed prior to reaching its end date. Click on "Close" button appearing against each open activity.

D. Follow-up function: Followup could be sent for pending responses just by click on follow-up button appearing against all open activities. On exercise of follow-up function, email will be sent to all pending response cases.

__Note:__ More than 1 (One) follow-up will consume communication balance. Activity wise follow-up sent could be checked from report available with Admin user under section "Subscription and Payment" tab on dashboard.

E. Re-open function: Campaign closed due passage of end date, could be reopened with new end date by click on re-open button.

F. Undelivered Emails: Emails undelivered to users and returned from email servers, will be shown under "Pending Emails" column against each of the activity. On click to hyperlinked undelivered email count, email resending screen will open.



Follow the below mentioned step to resend the error cases –

1. Download the error file containing email undelivered cases from tab ‘Download Excel’.
2. Check & correct the email ids in excel file downloaded.
3. Re-upload the excel file again to process communication for error cases.

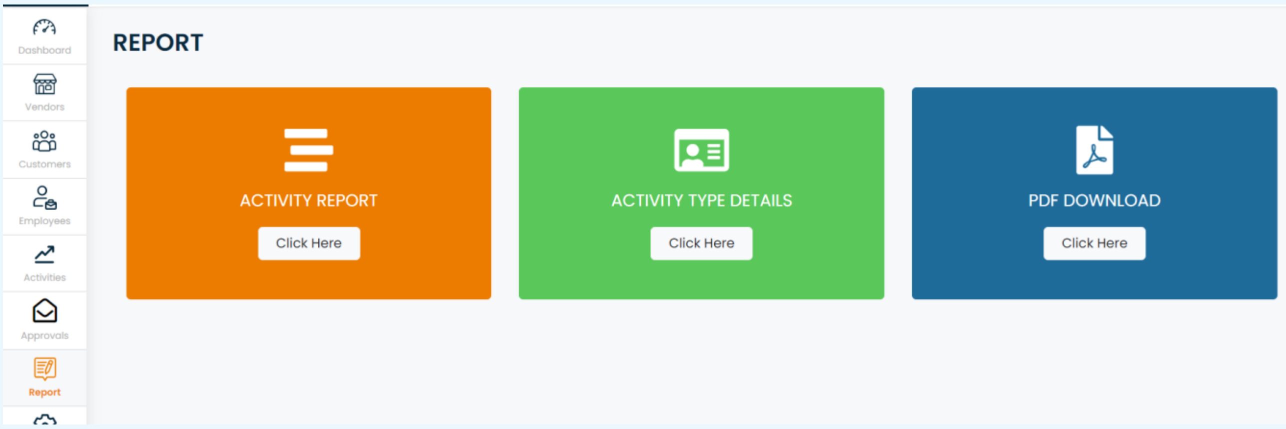
Note:

1. Undelivered email will be displayed on this column, as and when reverted from email servers. It could take few hours to couple of days depending on receiver email server.

2. System will try sending emails twice for all communications. In case email is not getting delivered even after 2 attempts by the system, same shall be displayed here for user to check & correct receiver email id.

Chapter 5: Reports

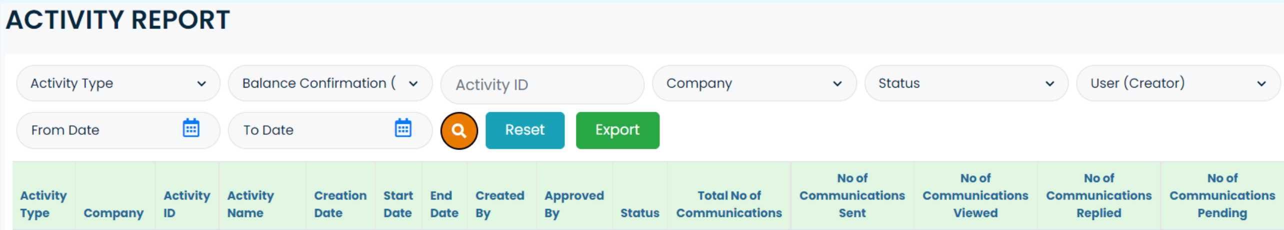
For the purpose of activity status and analysis of responses received, 3 reports are made available.



Function & utility of each of the report is mentioned as below-

Report 1: Activity Report

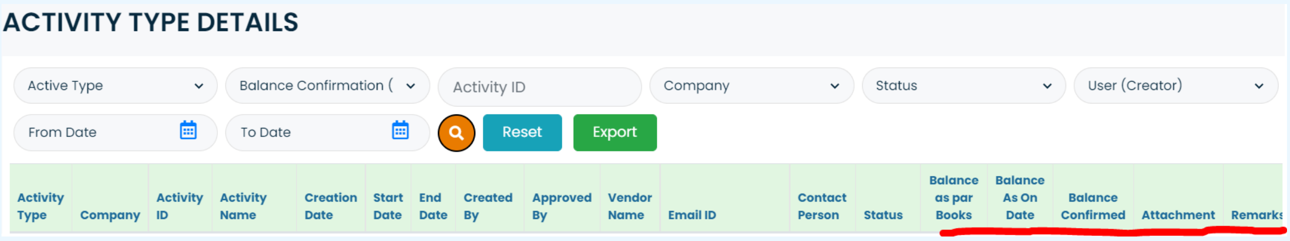
This report shows detail of activity along with total number of communications involved in the campaign, number of communications sent, viewed, replied and pending. Report can be exported in excel format for detailed analysis and records.



Report Selection: Report can be configured based on dynamic selection fields provided, however 'Activity Name' is mandatory in all the cases.

Report 2: Activity Type Report

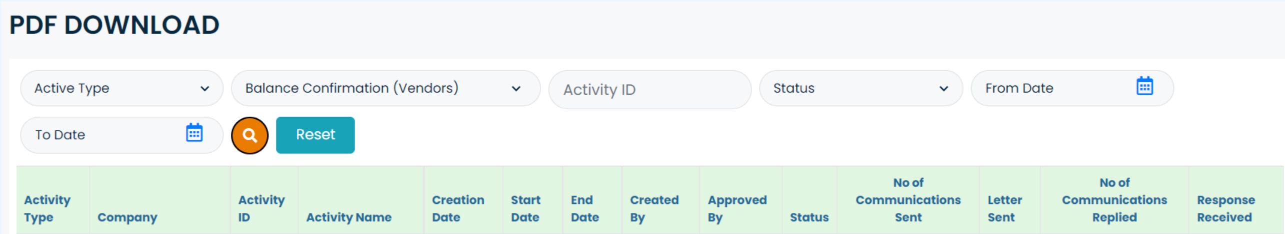
This report shows each lineitem wise detail of information asked and replied by the respondent. Format of this report will change according to Activity type, based on best use cases. Report can be exported in excel format for detailed analysis and records.



Report Selection: Report can be configured based on dynamic selection fields provided, however 'Activity Name' is mandatory in all the cases.

Report 3: PDF Download

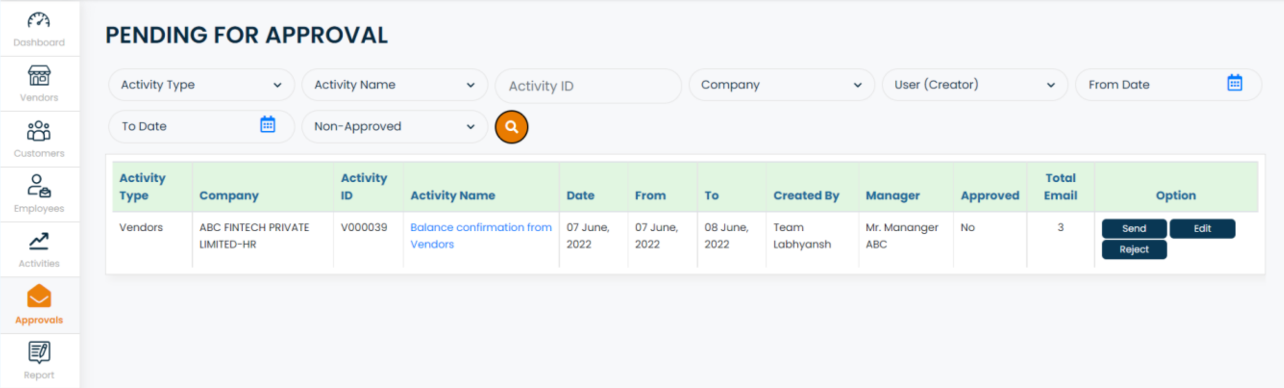
This report is used for downloading all the letters Sent and Received for any particular activity in one go in PDF format. Letters will be downloaded in zip file format. Time required for creation of zip file will depend on number of letters involved in particular activity.



Report Selection: Report can be configured based on dynamic selection fields provided, however ‘Activity Name’ is mandatory in all the cases.

Chapter 6: Manager Approval

Cases where, two-way approval option is selected by Admin in the entity master, activity created by a user will flow to manager mapped for his approval.



Manger assigned, will have following options to –

- **Approve:** Click on 'Send' button to approve the activity. Once approved, communications (emails) will trigger to all the recipients.

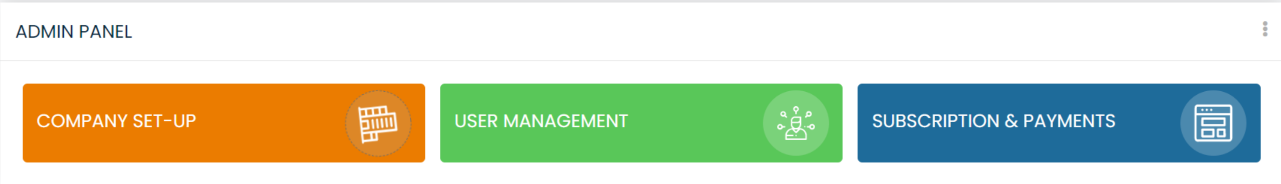
- **Edit & Approve:** Click on 'Edit' button to check and edit (where required) before approval of activity. After editing Manager needs to click on 'Send' button to approve the activity.

  Note: Manager will not be able to change data uploaded in excel format along with few other fields.

- **Reject:** In case campaign is not to be sent or excel data is to be changed before the approval, Manager can reject the activity and ask user to create new one.

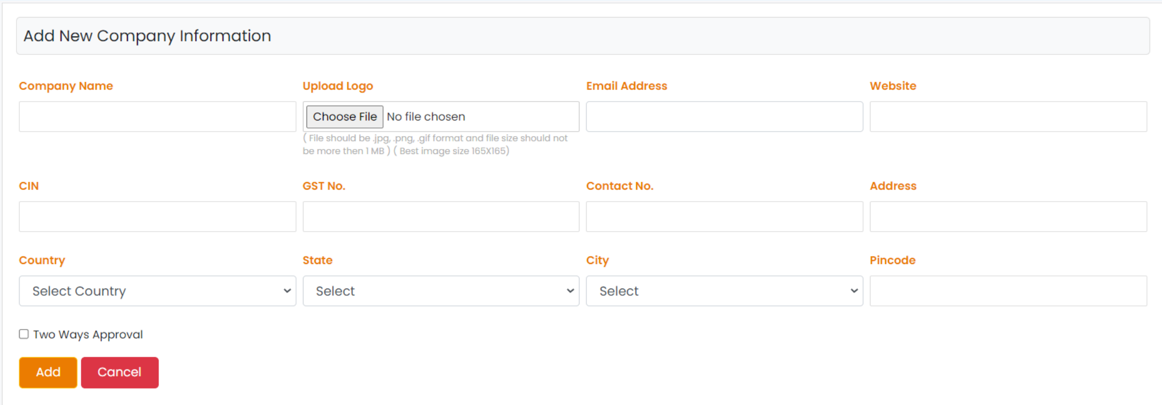
Chapter 7: Admin Functionalities

Admin user will have rights to setup entities, define users and access to payment & invoices. This section will not be visible to other category of users, except sub-admin.



Following are the functions available –

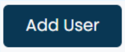
1. **Company Setup:** Admin user will able to view & add entities under this option. On click to Add Company below screen will appear -



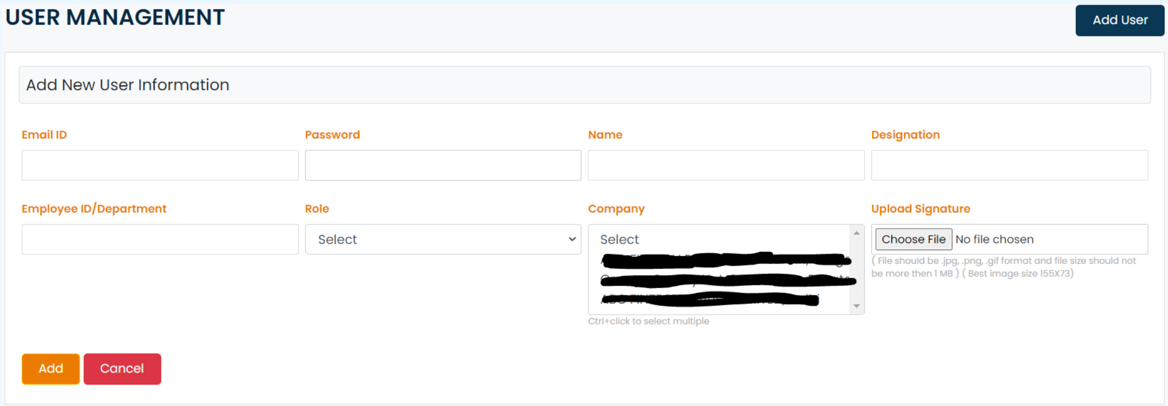
Among the input mentioned, website, CIN and GST are optional fields.

Two Way Approval Functionality: At the time of entity creation, Admin can opt for "Two Ways Approval". Once selected, each activity after creation has to be approved by Manager. In case this option is not selected, activity will directly be triggered once submitted by the User and will not wait for Manager approval.

Edit & Deactivation: After creation of an entity, admin can edit the information or deactivate an entity if not required using the function appearing against each of the entities.

2. **User Management:** Admin user will able to view & add users using this option. On click to 

below screen will appear -



On submission of above form, an email will be sent to user informing him on his User ID and password.

User Roles: Application divide users into following categories based on role assigned –

User: User will have access of activity creation, reports and dashboard. But will not have access to admin panel functionalities, Manager Approval tab.

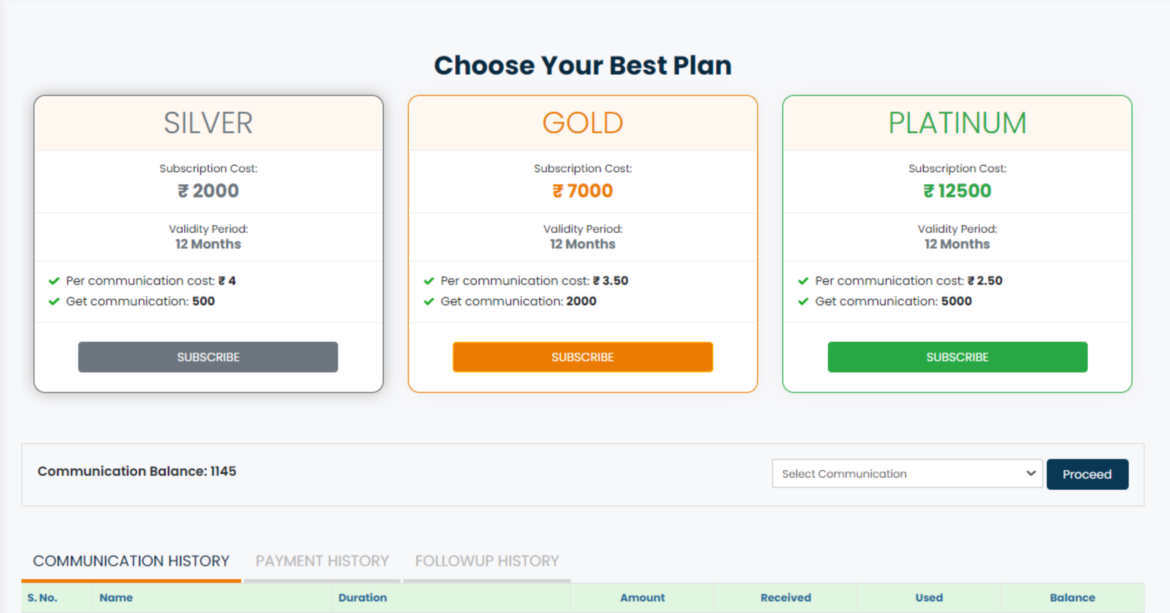
Manager: In addition to user rights, Manger will have access to “Approvals” tab to approve the activities created by user.

Auditor: Access of the application can be grated to Auditors or 3rd parties. Auditors will have view access of the activities, reports and status pages. Auditor will not have admin access and access of creation of any campaign.

Sub-admin: Sub-admin will have all access as available to Admin user.

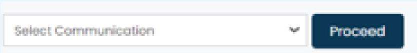
Edit & Deactivation: After creation of any User, admin can edit the information or deactivate the user if not required, using the function appearing against each of the user added.

3. **Subscription & Payments:**
Admin user will only have access to these details. Only Admin user can buy the subscription packages.



Options available at this page-

A. Buy a Subscription: Select the subscription best suitable for your business needs. Once 'Subscribe' option is selected, application will take user to payment page. Once payment is successfully made, communication balance will be added to bucket.

B. Top-up Communication Balance: User can add communication balances by selecting options from 

. For top up recharge, amount will be charges at rates applicable on subscription plan last purchased. Instead of top-up, users can switch or purchase subscription plan again.

C. Communication History: To view purchase & consumption of communication balances.

D. Payment History: To view payments made and invoices.

E. Followup History: To view activity wise consumption of communication in sending followups.

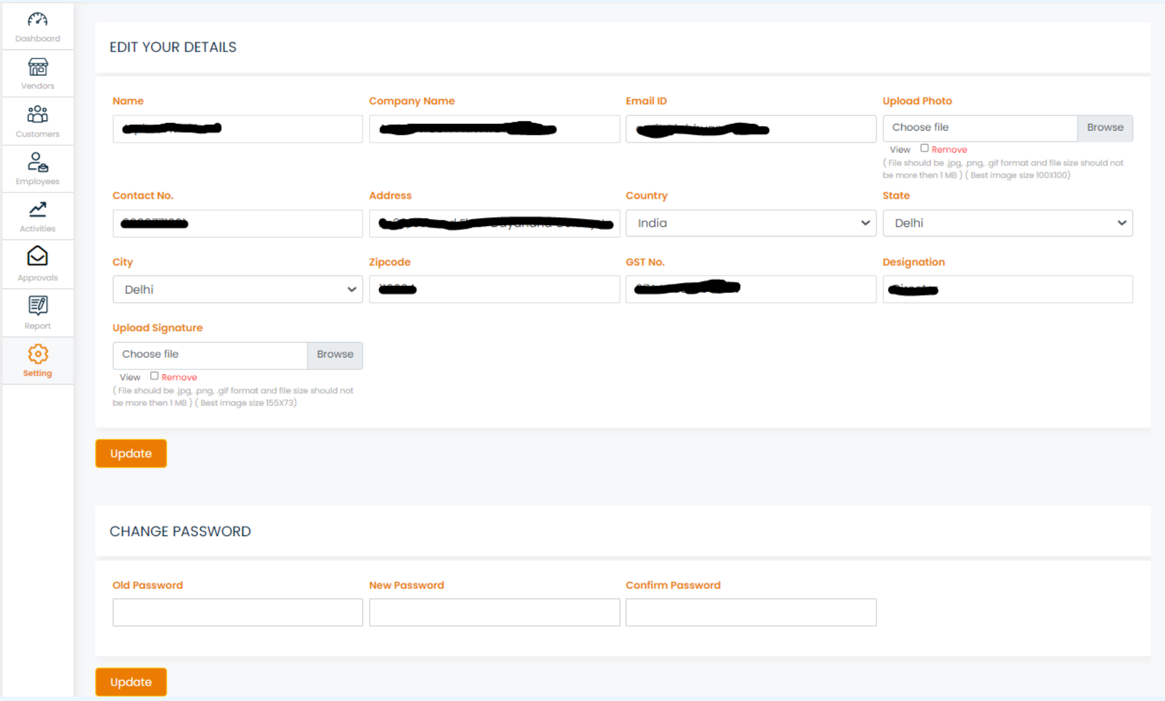
Chapter 8: Miscellaneous

1. Setting Tab:

Use Setting tab for following two activities –

a. View & Update user credentials, including user photo upload.

b. For change in login password



2. Frequently Asked Questions

Refer FAQ section on web application https://www.click2confirm.com/faq.htm.

3. System Configuration Requirement

No specific system configuration required; application run on all latest internet explorers and allows mostly used Microsoft Excel versions.

4. User Responsibility

Refer to terms to use https://www.click2confirm.com/terms.htm.

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