

User Guide

RMB Network Mobile App (version 1.0)



Designed & Developed by

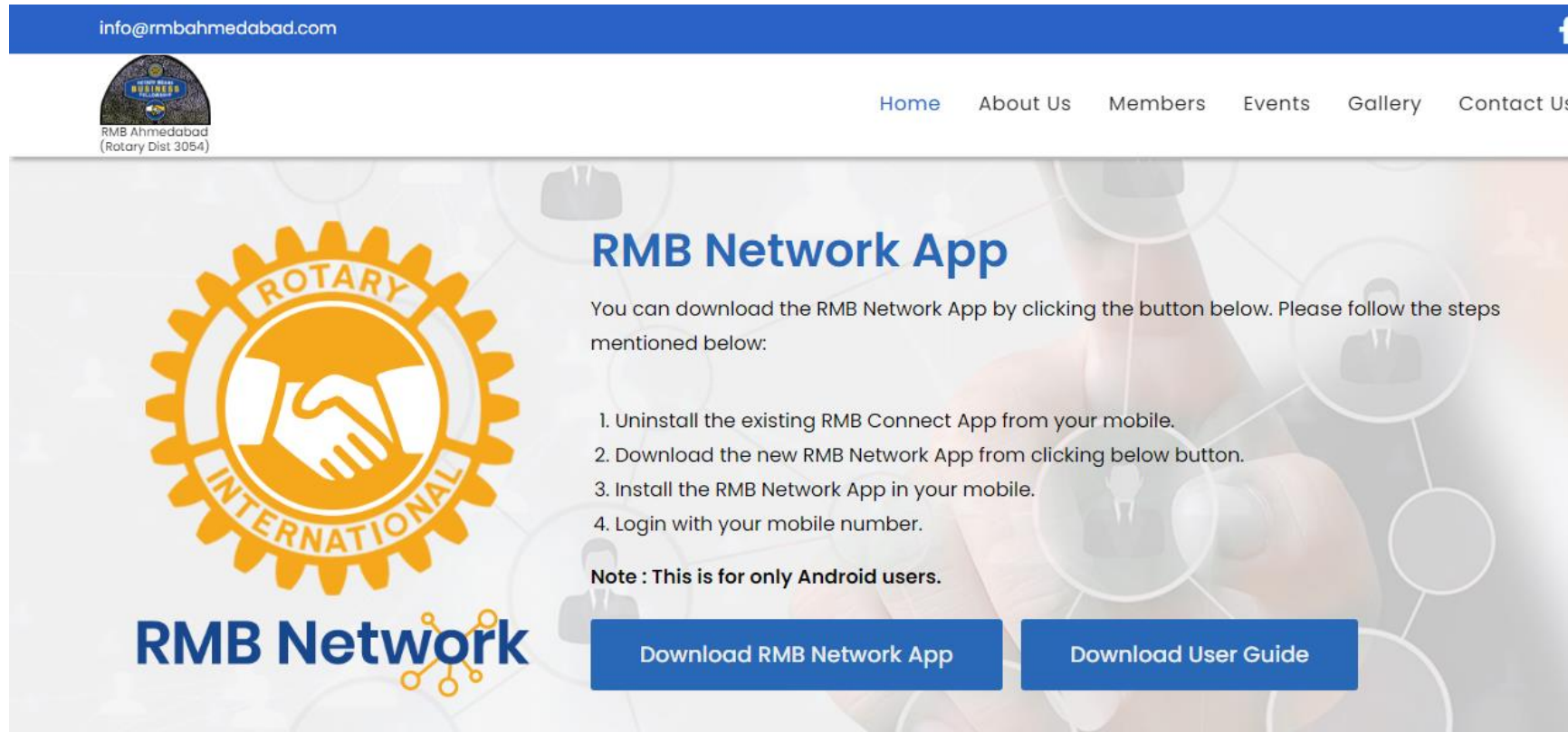


in association with

RMB Ahmedabad

How to Download the RMB Network Mobile App ?

While we are awaiting the Mobile App to be approved and hosted at Google Play & Apple App Store, in the interim, You may download the Android Mobile App along with the User Guide from the home page of the website www.rmbahmedabad.com. The link can be found at the bottom of the home page as below.



The screenshot shows the website's header with the email address info@rmbahmedabad.com and a Facebook icon. Below the header is a navigation menu with links for Home, About Us, Members, Events, Gallery, and Contact Us. The main content area features the Rotary International logo and the text "RMB Network App". It provides instructions on how to download the app and includes a note that it is for Android users only. Two buttons are provided: "Download RMB Network App" and "Download User Guide".

info@rmbahmedabad.com 


RMB Ahmedabad
(Rotary Dist 3054)

[Home](#) [About Us](#) [Members](#) [Events](#) [Gallery](#) [Contact Us](#)

Rotary International

RMB Network App

You can download the RMB Network App by clicking the button below. Please follow the steps mentioned below:

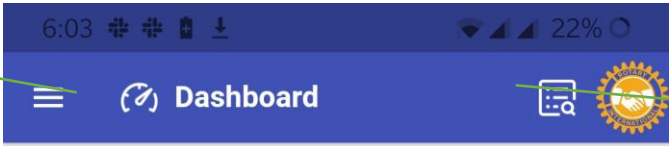
1. Uninstall the existing RMB Connect App from your mobile.
2. Download the new RMB Network App from clicking below button.
3. Install the RMB Network App in your mobile.
4. Login with your mobile number.

Note : This is for only Android users.

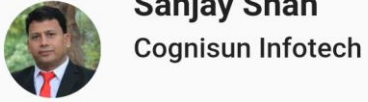
[Download RMB Network App](#) [Download User Guide](#)

Dashboard

Left side menu



Quick link for Chapter Roster or Directory



Next Meeting Date

Filter Activities by self

Me All Next Meeting: Sat Jul 31, 2021

Last Meeting Date

Filter Activities by entire Chapter

Since last Meeting 12 Months Life Time

Click + on the tile to add activity of given type

Filter Activities since last meeting date

1-2-1 4	Ref. Given 1	Ref. Rec. 0
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Click Activity icon to view the specific activity list with the filters specified

Filter Activities in last 12 months

Last Meeting Sat Jul 17, 2021

Score 18

Mem. Inducted

Count for specific Activity with the filter specified

Filter All Activities recorded on the App

Testimonial 0	TYN 0	Visitor 0
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Overall Score and Color Code for last calendar month
e.g. If today is Jul 12, 2021, this indicates the score based in the month of June 2021

Activities that can be viewed or recorded

- 1-2-1
- Reference Given
- Reference Received (Only the Reference Giver can Add)
- Testimonial
- TYN (Thank You Note)
- Visitor
- Members Inducted

Note:

You may not add or edit any activity entered by you before the last meeting date. Therefore, be sure to add all your activities by 4 pm on a day prior to the meeting. For example, if meeting is on Jul 17, 2021 (Sat), make sure that the activities are logged by Jul 16 (Fri) latest by 4 pm.

6:03 22%

Dashboard

Sanjay Shah
Cognisun Infotech

Me All Next Meeting: Sat Jul 31, 2021

Since last Meeting 12 Months Life Time

1-2-1 4	Ref. Given 1	Ref. Rec. 0
Last Meeting Sat Jul 17, 2021	Score 18	Mem. Inducted
Testimonial 0	TYN 0	Visitor 0

Score Computation Logic

How to access

Click on the Left Menu → Score Details or the Score Tile in the middle of Dashboard to view this information

5:55 25%

Score Logic

1-2-1	Per 1-2-1 Meeting (1-2-1)	2
Referral	Referral Given(OutSide) (RO)	10
	Referral Outside Confirmed (ROC)	20
	Referral Given(Inside) (RI)	5
	Referral Inside Confirmed (RIC)	10
Testimonial	Testimonial Confirmed (TC)	15
Thank You Note	Amount > 10 Lakh (TYN>10)	30
	Amount between 5L and 10L (TYN5-10)	20
	Amount between 1L and 5L (TYN1-5)	15
	Amount < 1L (TYN<1)	10
Visitor	Each Visitor (V)	15
Member Inducted	Each Member Inducted (MI)	25

Total score is computed based on the performance since last meeting w.r.t. the above activities

Color Code	Score Range
Green	> 30
Yellow	15-30
Grey	2-14
Red	< 2

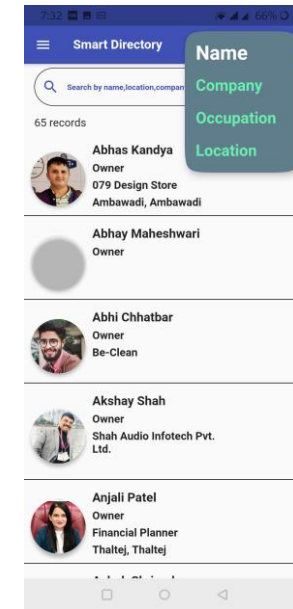
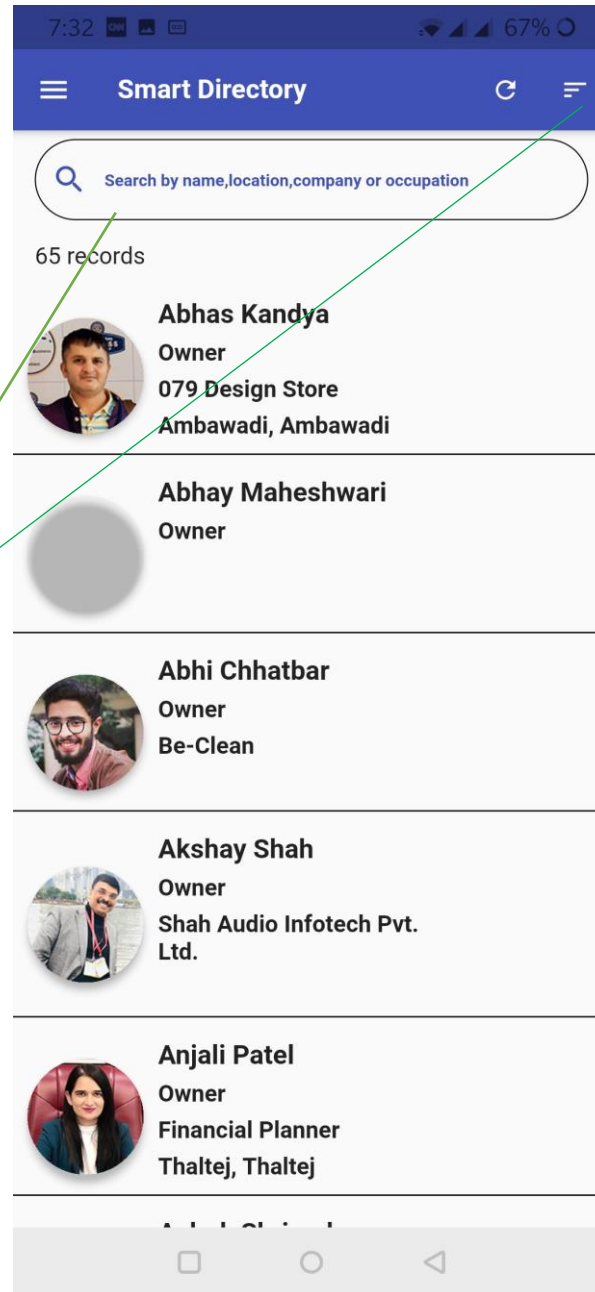
Chapter Directory or Roster

How to access

Use the directory icon in top right corner of Dashboard screen or Left Menu -> Directory to access

You may search, filter and sort by

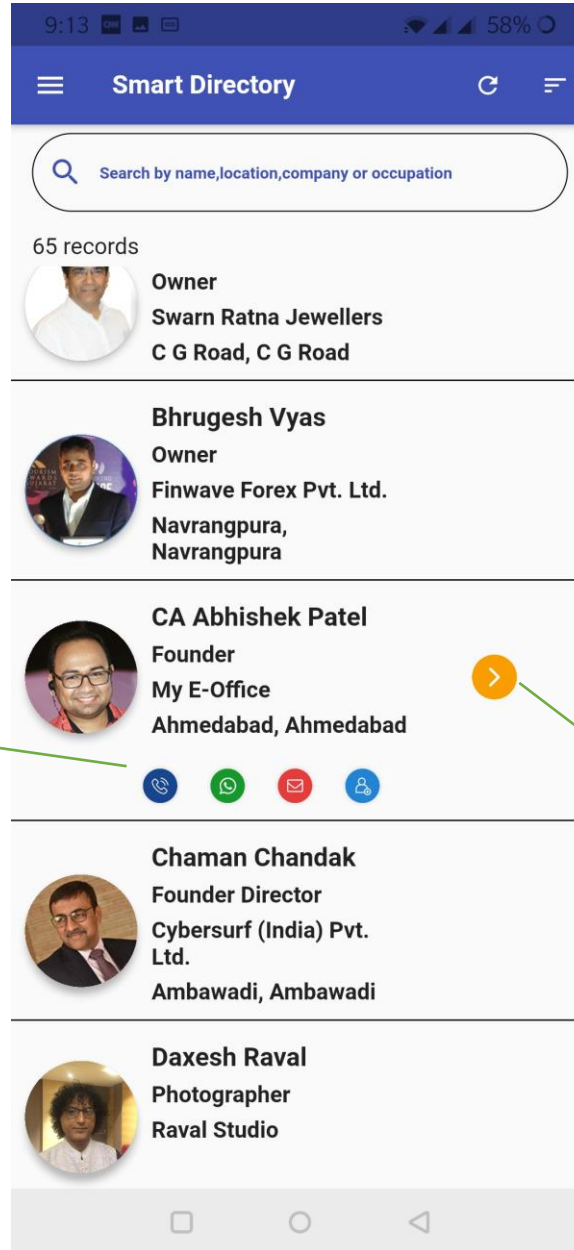
- First or Last Name
- Company Name
- Business Classification
- Office Location



View Member Details and One Touch Connect

Touch on member pic to access one touch connect icons for

- Phone
- WhatsApp
- Email
- Add to Contact



View Contact Details

Member Details

How to access

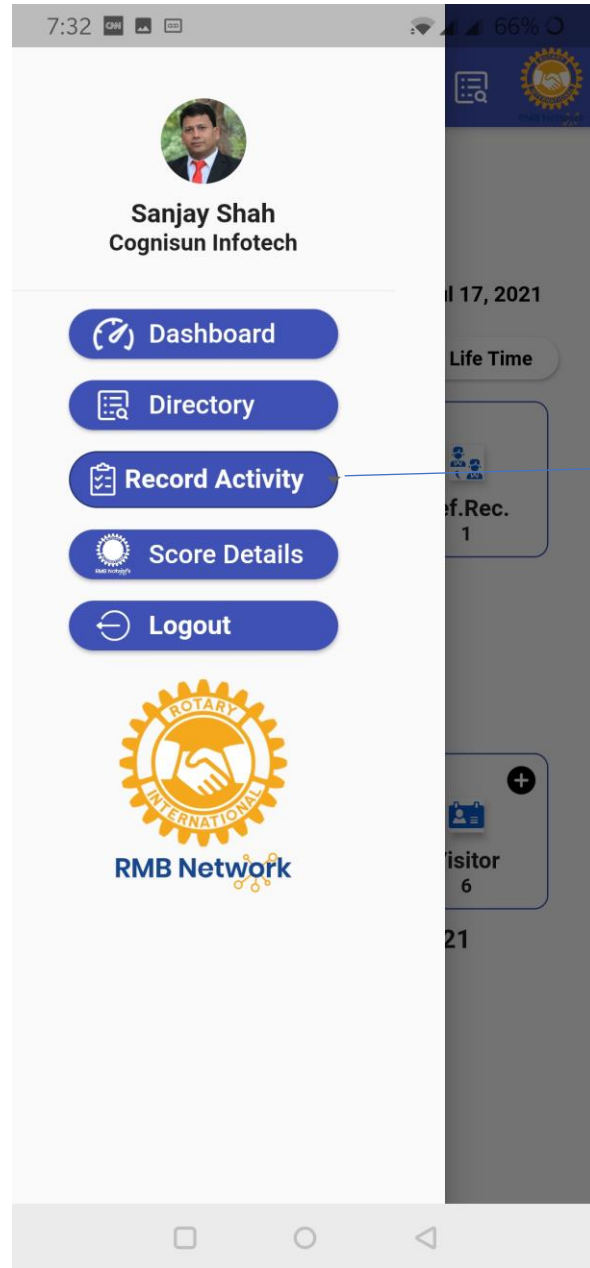
- On Dashboard, click on directory icon on top right corner Or From Left Side Menu → Directory
- Select the Member by touching on his/her pic and click detail icon

Member Details

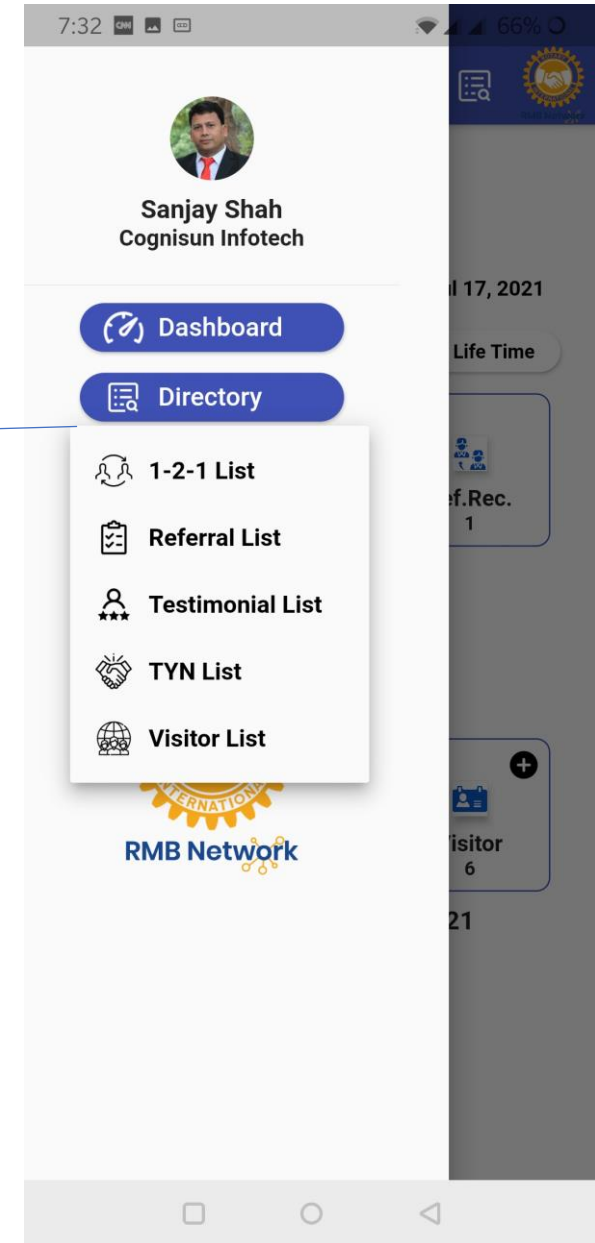
- Contact Information such as Phone, Email and Address along with Google Map
- Business Details
- Gallery containing the product/services pics, business card or corporate presentation.



Left Side Menu



Quick access to view the Activity List and add Activity



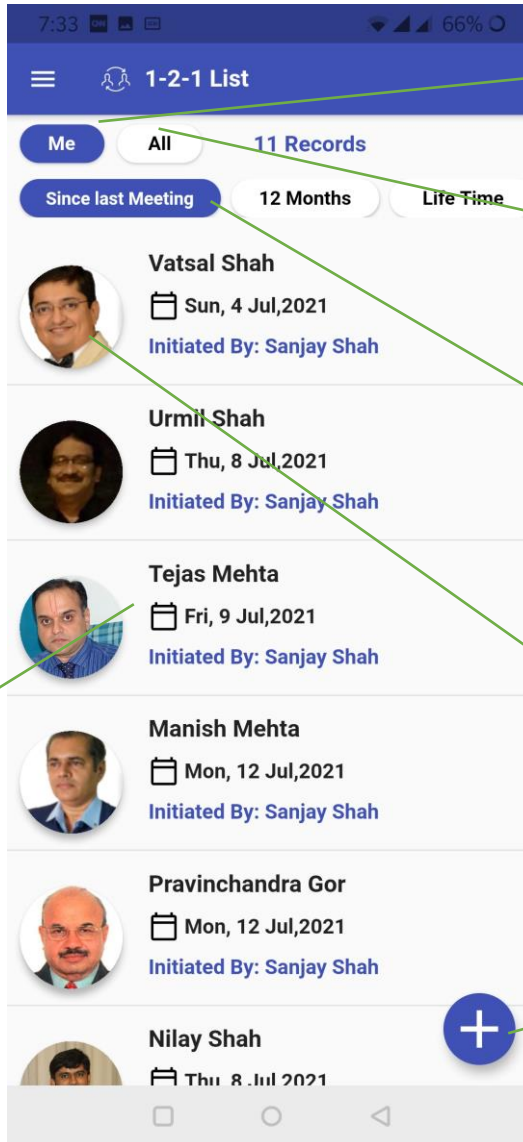
1-2-1 List

How to access

- On Dashboard, click on the icon in tile "1-2-1"
- From Left Side Menu → Record Activity → 1-2-1 List

1-2-1 Quick Information

- With Whom 1-2-1 was done
- 1-2-1 Date
- Who Logged 1-2-1 in the system



Filter Activities by self

Filter Activities by entire chapter

Filter Activities by duration (Since last meeting, last 12 months, or Lifetime)

Click on pic to view or edit (subject to edit security rules)

Click + button on bottom right corner to add 1-2-1

Add or View 1-2-1

How to access

- On Dashboard, click on + icon in the tile "1-2-1"
- From Left Side Menu → Record Activity → 1-2-1 List → Click + icon on bottom right
- From 1-2-1 List, touch the member pic to view or edit.

Record 1-2-1

1-2-1 With*

Initiated By: Sanjay Shah

Location *

Required

Meeting Date *
Mon Jul 12, 2021

Discussion Point*

Required

Save

Select the person you had 1-2-1 with

Location of 1-2-1

e.g. Robert's office or CCD at S G Highway

Date of 1-2-1

By default, system will show current date. You may select another date using date picker

Brief Description of what got discussed

This will help the members to remember the context of the meeting even after several month or years

Save

Save new entry or update an existing entry made by you within allowed timeframe
If you are not a party to 1-2-1, you can only view but cannot edit

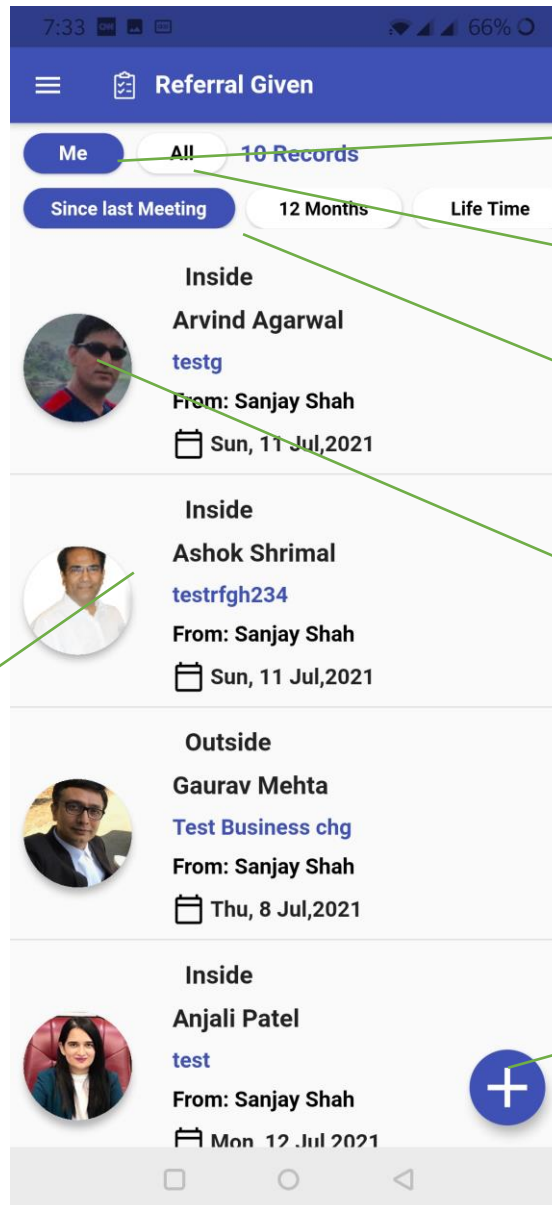
Referral Given List

How to access

- On Dashboard, click on icon in the tile “Ref. Given”
- From Left Side Menu → Record Activity → Referral List

Referral Given Quick Information

- Outside or Inside
- Who received the Referral
- Name of the Person/Company Referred
- Who gave the Referral
- When was the Referral given



Filter Activities by self

Filter Activities by entire chapter

Filter Activities by duration (Since last meeting, last 12 months, or Lifetime)

Click on pic to view or edit (subject to edit security rules)

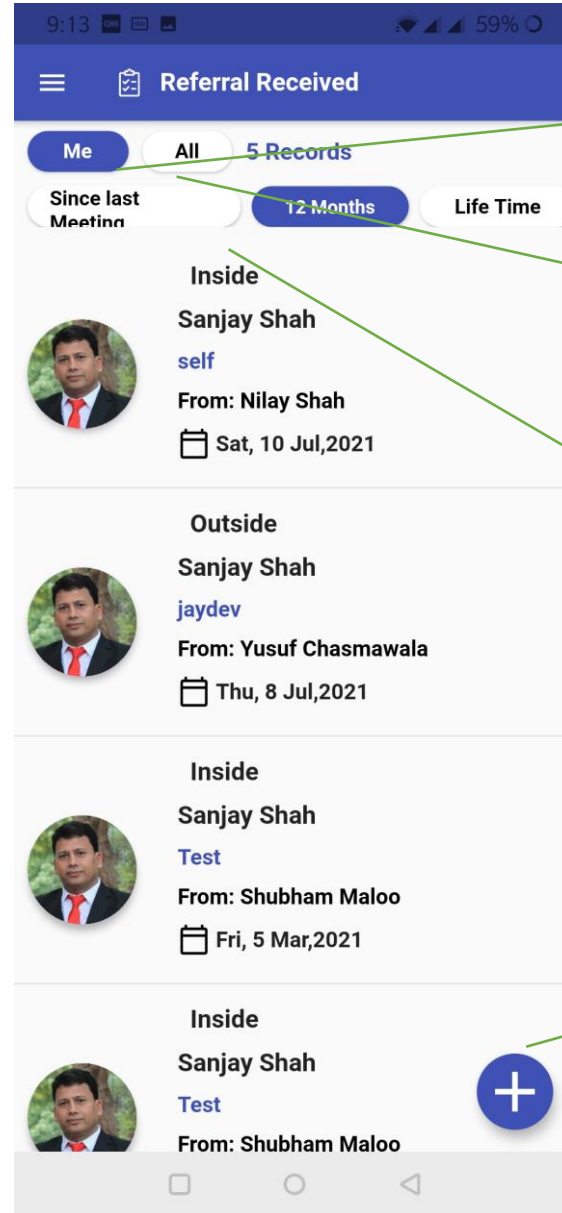
Click + button on bottom right corner to add a new Referral

Referral Received List

How to access

- On Dashboard, click on the tile “Ref. Received”

This list helps the member in tracking the history of all the referrals received by him/her for easier tracking and follow up



Filter Activities by self

Filter Activities by entire chapter

Filter Activities by duration (Since last meeting, last 12 months, or Lifetime)

Click + button on bottom right corner to add a new Referral

Add or View Referral

How to access

- On Dashboard, click on + icon in the tile "Ref. Given"
- From Left Side Menu → Record Activity → Referral List → Click + icon on bottom right corner
- From Referral Given/Received List, touch the member pic to view or edit.

Referral Heat Index or Likelihood of conversion

Save

Save new entry or update an existing entry made by you within allowed timeframe
If the Referral is not added by you, you can only view but cannot edit

Record Referral

To*

From: Sanjay Shah

Referral Type

Inside Outside

Referral Person*

Required

Phone*

Required 0/10

Referral Date *

Mon Jul 12, 2021

Email

Address

Comment*

Required

How Hot is this Referral?

★ ★ ★ ★ ★

Save

Select the person you are giving Referral to

Referral Type
Inside or Outside

Referral Person (or Company)

Phone number of person being referred

Date of Referral
Default is current date. Change as appropriate (subject to security rules)

Email and Physical Office Address of person being referred

Brief Description of the Referral

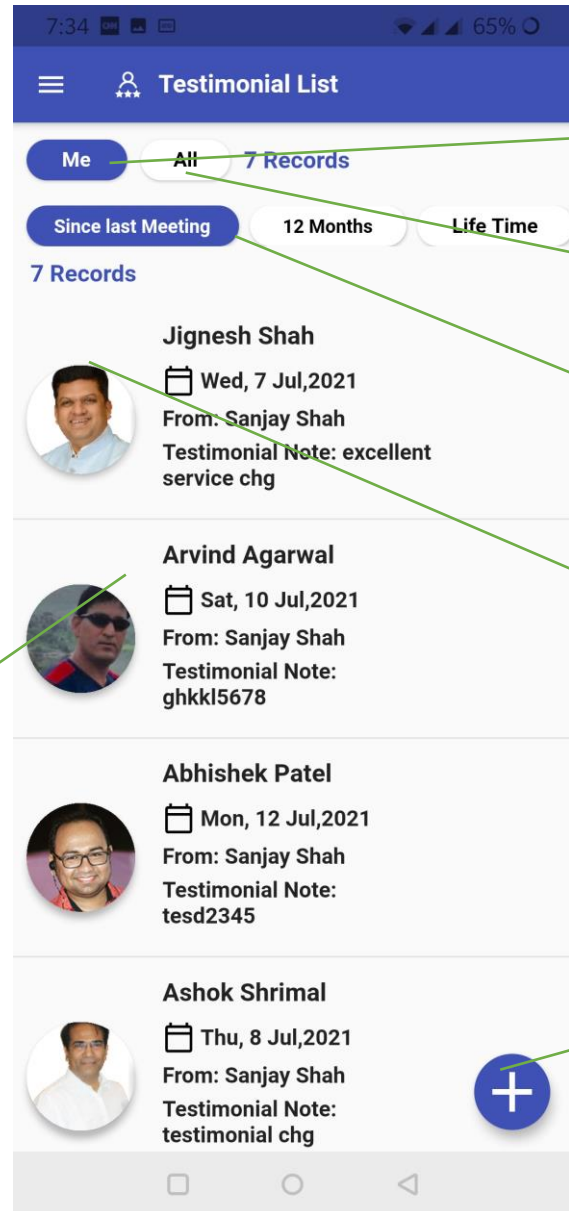
Testimonial List

How to access

- On Dashboard, click on the icon in tile “Testimonial”
- From Left Side Menu → Record Activity → Testimonial List

Testimonial Quick Information

- Who received the Testimonial
- When was the Testimonial given
- Who gave the Testimonial
- Brief testimonial note



Filter Activities by self

Filter Activities by entire chapter

Filter Activities by duration (Since last meeting, last 12 months, or Lifetime)

Click on pic to view or edit (subject to edit security rules)

Click + button on bottom right corner to add a new Testimonial

Add or View Testimonial

How to access

- On Dashboard, click on + icon in the tile “Testimonial”
- From Left Side Menu → Record Activity → Testimonial List → Click + icon on bottom right corner
- From Testimonial List, touch the member pic to view or edit.

The screenshot shows a mobile application interface for recording a testimonial. At the top, there is a blue header with a back arrow and the text 'Record Testimonial'. Below the header, the form contains several fields: 'Testimonial to Member*' with a dropdown menu, 'From: Sanjay Shah', 'Testimonial Date' with a calendar icon and the date 'Mon Jul 12, 2021', and a 'Description' field with a red underline and the word 'Required' below it. A blue 'Save' button is positioned at the bottom of the form. To the right of the main form, a smaller inset shows a list of member names with a green box highlighting 'Arvind Agarwal'. Green lines connect callout boxes to these specific elements.

Select the person you are giving Testimonial to

Date of Referral

Default is current date. Change as appropriate (subject to security rules)

Brief Description of the Testimonial

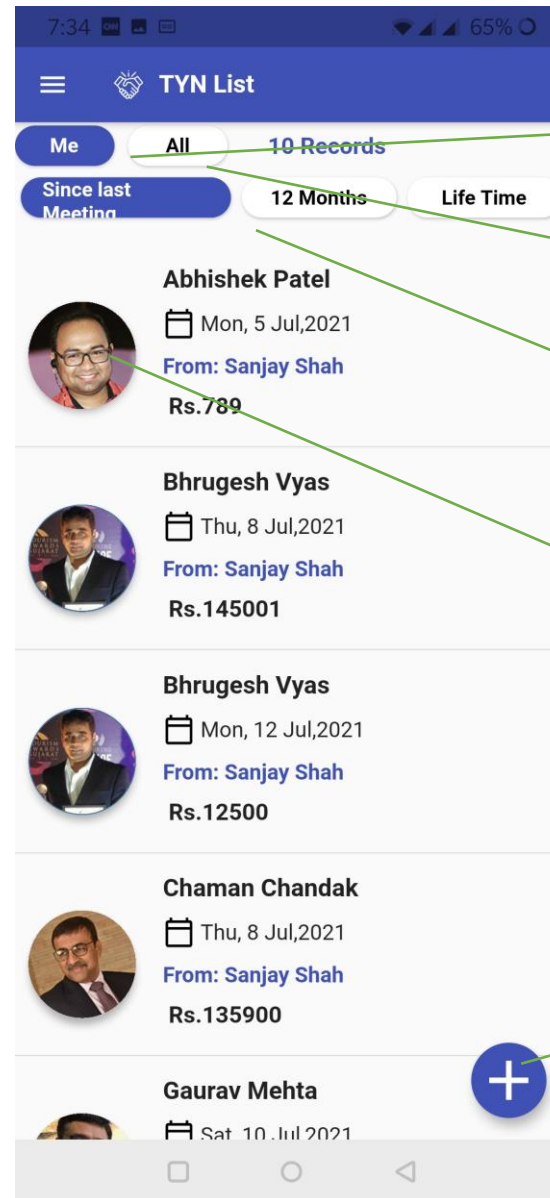
Save

Save new entry or update an existing entry made by you within allowed timeframe
If the Testimonial is not added by you, you can only view but cannot edit

TYN (Thank You Note) List

How to access

- On Dashboard, click on icon in the tile "TYN"
- From Left Side Menu → Record Activity → TYN List



Filter Activities by self

Filter Activities by entire chapter

Filter Activities by duration (Since last meeting, last 12 months, or Lifetime)

Click on pic to view or edit (subject to edit security rules)

Click + button on bottom right corner to add a new Referral

Add or View TYN (Thank You Note)

How to access

- On Dashboard, click on + icon in the tile "TYN"
- From Left Side Menu → Record Activity → TYN List → Click + icon on bottom right corner
- From TYN List, touch the member pic to view or edit.

Record TYN

Thank you slip to*

From: Sanjay Shah

Amount*

Required

TYN Date *
Mon Jul 12, 2021

Business Type

New Repeat

Referral Type

Inside OutSide Tier3+

Comment

Required

Save

Arvind Agarwal
K Maheshwari
Manish Mitta
Sumeet Nanda
Urooj Shah
Vishal Shah
Vishal Shah
Jeevan Jain
Kajetan Shah
Nitya Shah
Rakesh Mishra
Sanjay Dahi
Dhruv Vora
Harsh Barhadaya
Prashant Ajmera

Select the person you are giving Thank You Slip or Note to

Amount of Business Received

Date of TYN
Default is current date. Change as appropriate (subject to security rules)

Business Type
New or Repeat

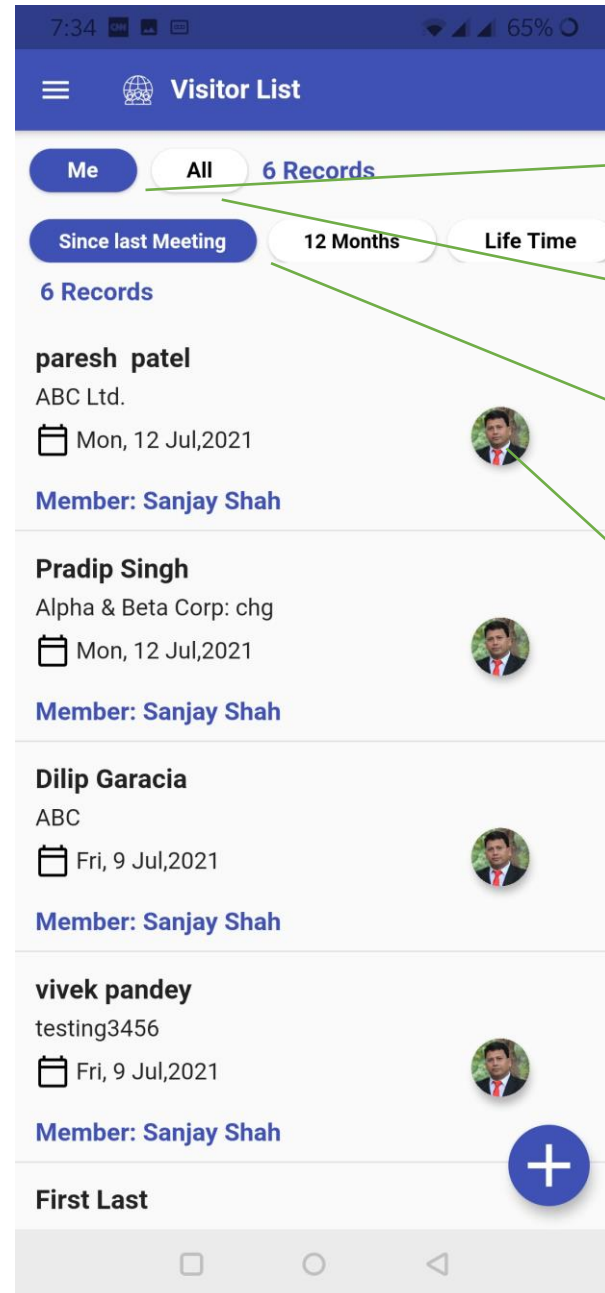
Referral Type
Inside or Outside or Tier3+ (Referral received from the Referred Party)

Save
Save new entry or update an existing entry made by you within allowed timeframe
If the TYN is not added by you, you can only view but cannot edit

Visitor List

How to access

- On Dashboard, click on icon in the tile “Visitor”
- From Left Side Menu → Record Activity → Visitor List



Filter Activities by self

Filter Activities by entire chapter

Filter Activities by duration (Since last meeting, last 12 months, or Lifetime)

Click on pic to view or edit (subject to edit security rules)

Click + button on bottom right corner to add a new Visitor

Add or View Visitor

How to access

- On Dashboard, click on + icon in the tile "Visitor"
- From Left Side Menu → Record Activity → Visitor List → Click + icon on bottom right corner
- From Visitor List, touch the member pic to view or edit.

Visitor Entry

From: Sanjay Shah

-- Select Title --

First Name*

Last Name*

Company*

Email

Phone* 0/10

Comment *

Save

Enter the Visitor Details

- First and Last Name
- Company Name
- Email
- Phone
- Comment

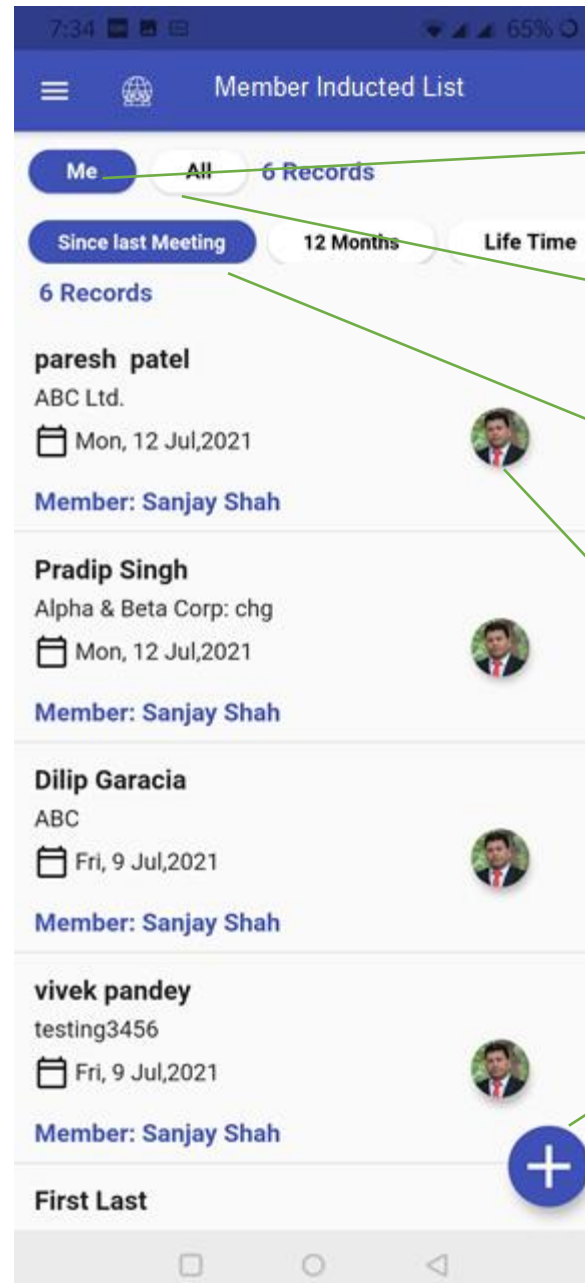
Note:

Please enter only the visitor that is going to attend the next meeting

Member Inducted List

How to access

- On Dashboard, click on icon in the tile “Member Inducted”
- From Left Side Menu → Record Activity → Member Inducted List



Filter Activities by self

Filter Activities by entire chapter

Filter Activities by duration (Since last meeting, last 12 months, or Lifetime)

Click on pic to view or edit (subject to edit security rules)

Click + button on bottom right corner to add a new Visitor

Add or View Member Inducted

How to access

- On Dashboard, click on + icon in the tile "Member Inducted"
- From Left Side Menu → Record Activity → Member Inducted List → Click + icon on bottom right corner
- From Visitor List, touch the member pic to view or edit.

Member Inducted Entry

From: Sanjay Shah

-- Select Title --

First Name*

Last Name*

Company*

Email

Phone* 0/10

Comment *

Save

Enter the Inducted Member (through your) Details

- First and Last Name
- Company Name
- Email
- Phone
- Comment

Member Wise Score

How to access

- On Dashboard, click on icon in the tile "Member Wise Score" under "All"

Search the member by name

Member Name	Score	Activities
Abhas Kandya	0	121(0) RO(0) ROC (0) RI(0) RIC(0) TC(0) TYN>10(0) TYN5-10(0) TYN1-5(0) TYN<1(0) V(0) MI(0)
Abhay Maheshwari	0	121(0) RO(0) ROC (0) RI(0) RIC(0) TC(0) TYN>10(0) TYN5-10(0) TYN1-5(0) TYN<1(0) V(0) MI(0)
Abhi Chhatbar	2	121(1) RO(0) ROC (0) RI(0) RIC(0) TC(0) TYN>10(0) TYN5-10(0) TYN1-5(0) TYN<1(0) V(0) MI(0)
Abhishek Patel	0	121(0) RO(0) ROC (0) RI(0) RIC(0) TC(0) TYN>10(0) TYN5-10(0) TYN1-5(0) TYN<1(0) V(0) MI(0)
Akshay Shah	2	121(1) RO(0) ROC (0) RI(0) RIC(0) TC(0) TYN>10(0) TYN5-10(0) TYN1-5(0) TYN<1(0) V(0) MI(0)

View the Legends and Score Logic

Member Score since last meeting along with traffic light color

Member activities counts since last meeting.

For Any Suggestions, Comments or Issues

Please get in touch with Rtn Sanjay Raja, IT Coordinator - RMB Ahmedabad

+91 91 98983 12197

