

# Glow Wisdom – Glow Service Web Portal

101 Building No 2, Sarvodaya Hill, Chole Road, Balaji Nagar, Thakurli (E). M: 9930713613 (Jacob)

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## Glow Service Web Portal by Glow Wisdom

### Details without Login (Static part)

- **Homepage**
  - Some photos of products for which services are provided are highlighted here
  - Some tips of usage to maintain products can be provided here
  - Why to choose your service is described here
- **About Us**
  - When your service center was established is shown here
  - Here you can also let the site visitor know to approximately how many customers you have provided service
  - You can describe yourself and let site visitor know why should they choose your service
- **Products**
  - Your various products with its service details and charges (optional) can be listed here in tabular form
- **Testimonial**
  - Short testimony from customers with photo (optional) is displayed here
  - This motivates prospective customers
- **Photo / Video Gallery**
  - Photos & videos of products are shown here
  - When a new set of photos are available, you can mail us & our support team will make them available on website within 24 hours
- **Contact Us**
  - Your service center address, contact number, email ID & website address are shown here
  - Along with the above details, there will be a form which visitor fills and when submitted is sent to you via Email
  - Direction guide will be available to guide the person to service center from popular landmark
  - Google map will be available to guide visitors to your service center on real-time.

### Details with Login (Dynamic Part)

#### Management

- **Homepage (after staff login)**
  - **Pending Service View (Service Module)**
    - Here list of all customers are shown for whom appointment for service is pending
    - The main target of the office staff should be to make this register with lesser records as possible since a good & prompt service will open door to timely AMC
  - **Appointment View (Appointment Module)**
    - Appointment for the day of all executives can be viewed easily
    - Click a different day in the calendar to view appointments for that day
    - From here appointment can be fixed or marked as completed
    - Completed appointment has different color than pending appointment

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- **AMC View (Payment Module)**
  - AMC pending list is shown here
  - By default records of those customers are shown for whom AMC falls between previous one month to next one month
  - Change of date will immediately show AMC list based on the selected date range
- **Administrator's basic setup (only administrator can access)**
  - **Employee**
    - Here administrator adds and manages employees
    - Along with employee record, his/her salary & bank account details are stored here
    - Based on the chosen modules, more benefits will be available
    - In-charge can decide whether to grant login access to employee
    - In-charge can suspend employee if he/she has resigned. Suspended employee cannot login
  - **Products**
    - In-charge can create products with its details such as rate, tax %
    - Based on tax % entered here, amount will be calculated by portal when order is placed
    - In-charge can set service frequency for a product i.e. every 3 months, 4 months, 6 months, etc...
  - **Ledger**
    - In-charge can create ledger account here with sections of Income and Expense.
    - All headers for Income & Expense are created here. In-charge need not create Income ledger for Income collected from service as they are automatically calculated by portal
  - **Income Register**
    - Portal will automatically calculate incomes entered in portal for selected month.
    - You can add additional income whose ledger you'd have added in ledger.
  - **Expense Register**
    - All expenses entered in portal are automatically calculated by portal for selected month.
    - You can add your own expense whose ledger you'd have added in ledger.
    - Expenses can be defined global or employee-wise. This helps to calculate global and employee-wise expenses report.
  - **Profit Analyser (Payment Module)**
    - Basis income and expenses entered, Profit analyser shows income v/s expense month-wise.
    - In-charge can view profit analysis month-wise for calendar year and financial year
    - Profit analysis is also shown by means of graph for a better view
  - **Balance Sheet (Payment Module)**
    - **Shows receivable amount of selected financial year for:**
      - Employee-wise
      - Customer-wise
    - **Shows amount received of selected financial year for:**
      - Employee-wise
      - Customer-wise

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- **Admin Actions**
  - **Client**
    - In client register, employee can create and manage customer records along with address and contact details
    - If new client is referred by existing client, that too can be mentioned in client entry
  - **Client with Products (Service Module)**
    - You can combine product with clients by linking client name and product name
    - Thus change of client address / contact details for one products automatically gets updated for all products
    - If a client has more than one same products, then you can set unique information in ID Mark to distinguish them
    - Even if single product of a type is available, still it is suggested to mention ID Mark
    - Here you can also set current situation of AMC from & AMC to dates
  - **Client At A Glance Report**
    - This report is the heart of the portal for customer records – every portal operator would love this report to get information instantly
    - By default all customer records are shown
    - You can enter filter criteria to filter customer lists
    - You can filter customer record based on following 8 search criteria:
      - Name
      - Primary or secondary mobile
      - Primary or secondary landline
      - Primary or secondary Email ID
      - City
    - Client At A Glance shows basic information of a customer such as address always on screen
    - Apart from address, the following tabs are available to display records
      - **Products (Service Module):** Products, ID Mark, AMC from & AMC to details are displayed here
      - **Sales Order (Payment & Service Module):** Order date, Order By, Product, ID Mark, Order Amount & Payments received so far against particular orders are shown here
      - **Ledger (Payment Module):** Order details, Bill Amount, Receipts, payment mode, Cheque / DD number, Dated, & Bank details are displayed here
      - **Appointment (Appointment Module):** Appointment Date, Time, Executive, Product, ID Mark, Task, Completed on details are shown here
      - **SMS (SMS Add-on):** All SMS sent to the selected customer is shown here with its delivery status
- **Sales Order (Payment & Service Module)**
  - Sales order for a customer with particular and order by can be placed here
  - Based on selected years, next AMC date automatically appends to those number of years, operator can also change this date
  - Rate, Tax & Amount as entered in product master are automatically displayed with the option for operator to change it (if desired)

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- **Payment Entry (Payment Module)**
  - When customer name is entered, only those sales order numbers are shown for which payment is pending
  - When a particular order number is selected, portal automatically shows balance amount
  - Operator needs to enter just amount with mode of payment
- **Appointment Tracker (Appoint Module)**
  - In appointment tracker, operator can assign appointment for a customer against a particular product to an executive
  - Smart time system of portal makes sure that if an executive is already allotted to particular time, that time can't be selected for another appointment – no time clashes
  - If desired, appointment can be transferred to new executive, new date / time
  - Once completed, operator has to enter completed date which helps portal to calculate and show next service due date
  - With the help of Print command, appointment for an executive for a particular day can be printed with name, address & task to be completed. Thus the time and efforts of employees to manually write is saved
- **Report**
- Based on selection of modules, various reports can be available
  - **Print Appointment (Appointment Module):**
    - Printout of appointments can be taken for executives
    - By default portal selects next date from current date, which can be changed
  - **Outstanding (Payment & Service Module)**
    - Outstanding report enables taking printout of outstanding employee-wise.  
Outstanding = Sales amount – received amount
- **Multi-Lingual – Dynamic Part only**
  - **Hindi**
  - **Marathi**
  - **Tamil**

## Advantages

- Access data from anywhere through internet
- Upto 5 branches can be managed by respective staff
- Upto 5 branches can be monitored by incharge in a centralized manner
- Additional branches can be enrolled on purchase of additional license(s)
- No need to search records on paper
- Every process works smoothly
- Appointment of employees are tracked
- Outstanding report is always at a click distance
- AMC reminder can be sent via email / SMS
- Employee's Appointments can be easily monitored

For more details, feel free to contact us

Thank you