Glow Wisdom – Glow Inventory Portal

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Glow Inventory 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 after Login

- **Administrator's basic setup (only administrator can access)**
  - **Homepage**
    - **Pending Service View**
      - Whichever customer is having service due, they are shown here
      - The main target of office staff is to make this page with lesser records. A good and prompt service will open door to timely AMC
    - **Appointment View**
      - Appointment the day of all executives can be viewed easily
      - Click a different date to view appointment for that day
      - Completed appointments has different color
      - Appointment completion SMS is sent to customer (if SMS service is opted - optional)
    - **AMC View**

- AMC pending list is shown here
- By default records of those customer are shown for whom AMC is pending from last month to next month
- Change of date will immediately show list based on selected date range

- **Branch**
  - Administrator can create as many branches as allotted to them
  - Reports can be generated branch-wise and globally as well
- **Employee**
  - Here administrator adds and manages employees
  - Along with employee record, his/her salary & bank account details are stored here
  - When an employee is created, his/her role is also assigned. Portal works based on given role as below
    - Administrators (in-charge):-   has full rights
    - Staff:- action menu related to sales and service. Master records are invisible
    - Field executive:- only appointments assigned to self for any date. Can also complete appointment by self
  - Based on the chosen modules, more benefits will be available
- **Product (Stock, Sales, Service module)**
  - New products can be added here
  - While adding new product, administrator can set its Tax % also
- **Supplier (Stock module)**
  - Suppliers records are added and managed here
  - Suppliers record will also contain their contact details which can be used to place order from portal by email
  - Report of current stock
- **Purchase (stock module)**
  - In purchase form, products purchased from suppliers are entered
  - Once purchase order is added, the same become inward entry for stock report
- **Store section**
  - Upto three level of store sections can be created in this form
  - The three levels of store sections can be referred as location → Room → Shelf
- **Ledger**
  - Administrator can create ledger account here with sections of Income and Expense.
  - All headers for Income & Expense are created here. Administrator need not create Income ledger for payments received as they are automatically calculated from 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.
  - **Profit Analyser**
    - Basis income and expenses entered, Profit analyser shows income v/s expense month-wise.
    - Administrator can view profit analysis month-wise for calendar year and financial year.

- **Admin Actions**
  - **Customer**
    - Here customers record are entered with their address & contact details
    - If the customer is referred by existing customer, that can be entered here
  - **Sales (Sales module)**
    - Here admin can sell a product to customer
    - Based on previous sales record of the product, its price & tax will be auto-filled - can be modified if desired
  - **Service (Service module)**
    - In this form, all service related entries are made
    - If a customer has more than one same product, then you can set unique identification in ID mark to distinguish them
    - AMC details can also be set in this form
  - **Payment (Sales & Service module)**
    - When customer name is entered, only those sales / service entries are shown for which payment is pending
    - When a particular order no is selected, portal automatically shows balance amount
    - Operator needs to just enter amount and select payment mode
  - **Customer 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 customers record based on following 8 search criteria:
      - Name
      - Primary or secondary mobile
      - Primary or secondary landline
      - Primary or secondary Email ID
      - City
    - Customer 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 (subject to choice of modules opted)
      - **Products (Sales & Service module)**: Products sold to selected customer are shown here
      - **Service (Service module)**: All registered service(s) of all selected customer are shown here
      - **Ledger (Sales & Service module)**: All sales / services pertaining to selected customer are shown here

- **Payment (Sales & Service module)**: All pending amount along with amount received with the mode of payment and other details like cheque no, bank name, etc… are shown here. Overall pending amount of a customer can be seen immediately
- **Appointment (Service module)**: all appointment details such as which executive attended on which date and the task done are shown here
- **SMS (SMS Add-on)**: All SMS sent to the selected customer is shown here with its delivery status
- **Report**
  - Address Book
  - Based on selection of modules, various other reports will be added

Appointment (Service module)

- Here appointments can be registered for selected customer against selected 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
- Completed appointments are also tracked
- Print feature enables printing appointment executive-wise for an entire day. This feature saves time in manually writing customers address with task to be done

- **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 branch(es) can be enrolled on purchase of additional license(s)
- No need to search records on paper
- Every process works smoothly
- Appointment of customers are tracked
- Outstanding report is always at a click distance
- Outstanding reminder can be sent via email / SMS
- AMC due reports are always at a click distance
- Compay's performance can be tracked by incharge in terms of profit status

For more details, feel free to contact us - Thank you