



Sun Programs

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# User Manual

## GLOBAL INFOWINGS ERP

## Introduction

Global Infowings ERP is a online software that boosts productivity and profit through data integration. It connects and improves business processes; branches, leads, sales, finance, staffs, college management, fees, attendance...

Since some years, the bringing-in of the IT systems to the business competitiveness becomes more and more visible. The latter went from tools processing recurrent operations to tools running and optimizing the day to day activity. Nowadays, the Enterprise Resource Planning softwares are even frequently at the origine of getting a competitive advantage.

The departments based organization, vertically structured, is coming out and the integration around processes is the everyday reply to the companies reactiveness need, reliability and anticipation. We need to be able to understand each other, to work efficiently between sales and marketing people, technicians, accountants and logisticians of a same company in order to optimize the global functioning.

All the documents, modules and different functions of Global Infowings ERP have a homogeneous interface. Once this first approach mastered, you will be able to surf and use every module of Global Infowings ERP.

## The Login Screen

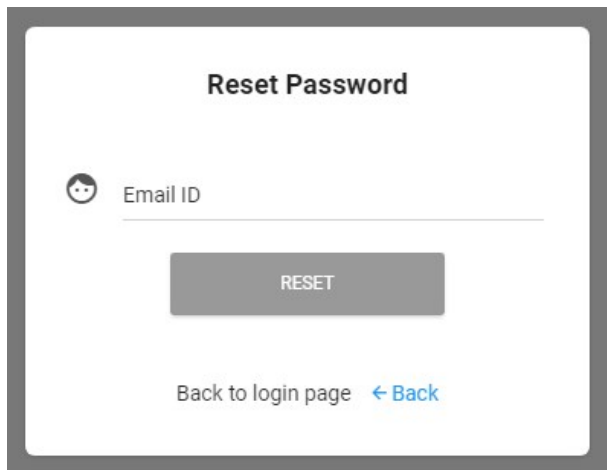
Before to be able to start using Global Infowings ERP, you need to be identified. That's why the first screen to be displayed is the login screen.

In this screen, you can type your login Id and password. Three users have been created, ensuring you to use the software.

User	Password	All Rights
Admin	*****	Reaches Every modules
Branch	*****	Reaches Every Assigned modules
Staff	*****	Reaches Every Branch's Assigned modules

# Reset Password

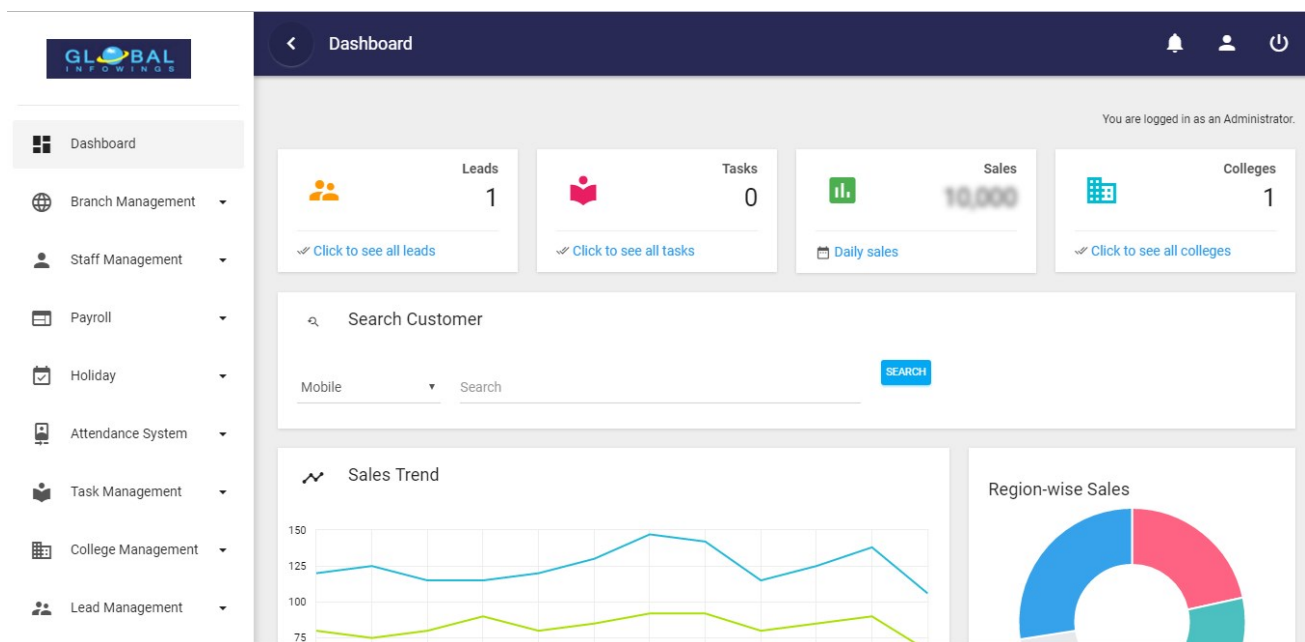
In case, if you unable to access your account. You can reset your account password. You can find a Forgot Password? link in the login screen.



In this screen, you can type your email Id and get the instructions by the email.

# Dashboard

After identification, the Global Infowings ERP dashboard screen appears on the screen. This screen contains several parts that we are going to discover together.



## Icons

The icons are always present on the screen. They ensure you to do most of the usual operations (open, edit, delete,...) and never change from one form to another. Further we will detail the different ones.



## Software Modules

The Global Infowings ERP menu is a tree. That means that menu element is containing one or more other elements. You can "open" each menu or submenu by clicking on the arrow icon on the right of the menu element that you wish expanding. Once the menu expanded as wished, you can open a form or data by clicking on the menu element concerned

Access all the assigned modules in the left side of your screen.

- Dashboard
- Branch Management
  - All Branches
- Staff Management
  - Groups
  - Accounts
- Payroll



Dashboard



Branch Management



Staff Management



Payroll



Holiday



Attendance System



Task Management



College Management



Lead Management

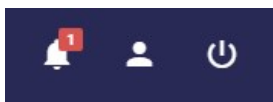
## Top Icons

You can find three icons in the top right side in the screen. All icons are clickable.

**Bell Icon:** It's a notification icon. It has a drop down with the recent notifications. The unseen notifications will be counted and displayed over the icon in red color.

**User Icon:** A user can find profile related links here.

**Off Icon:** Log Out.

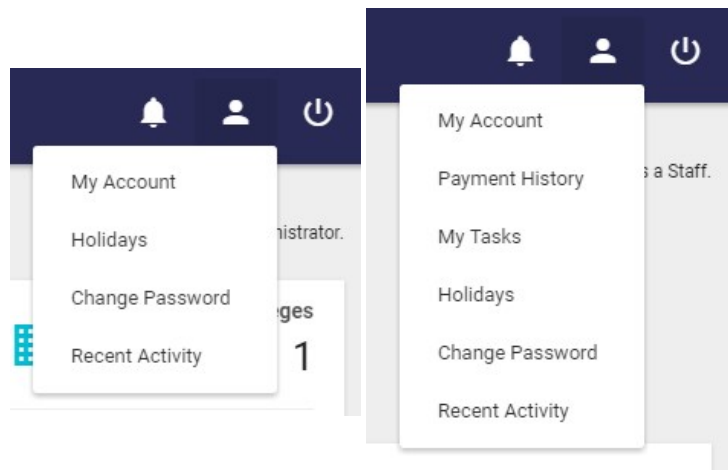


## User Links

Click on user icon and get the profile related links.

Image 1: belongs to Admin and Branch.

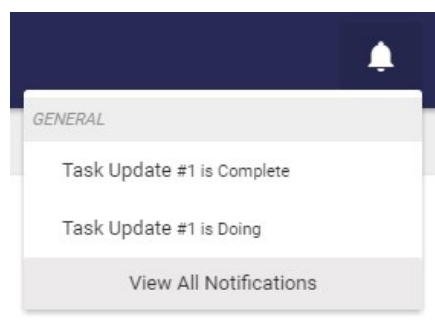
Image 2: belongs to Staff.



## Live Notifications

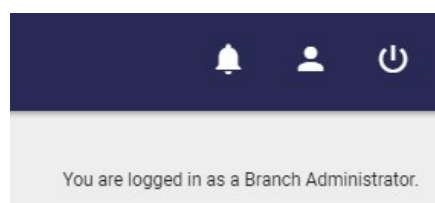
Click on bell icon and get the recent notifications. There are two types of notifications.

- 1) **Personal** : These notifications belong to you only. It can be a task, salary, etc.
- 2) **General** : General notifications belong to you and others too.



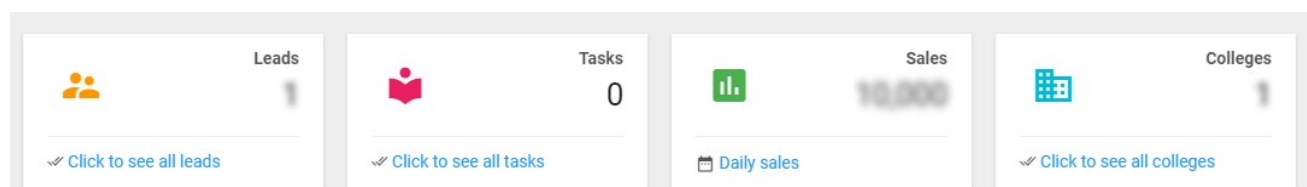
## Log User

It's a Multi-level software. This function will help you to know which account you have logged in. There are three users: Administrator, Branch Administrator, and Staff.



## Total Numbers

In this section, you can find the total numbers of leads, tasks, sales, colleges.



## Search

In this section, you can search the customer by his name, mobile number & email id. If there is any record exists which is matches to one of these input it will be showcase below to this screen.

## Tabs

It is present below in your dashboard screen, In this section, you can find the Most popular colleges, top location leads, Next follow ups and upcoming follow ups.

**Most Popular Colleges:** Based on college admissions.

**Top Location Leads:** Based on city leads.

**Next Follow Ups:** You can find all the follow ups between current time to next 4 hours.

**Upcoming Follow Ups:** You can find all the follow ups between current time to next 24 hours.

### Most Popular Colleges

College	Admissions	Sales (Rs.)
St. Xavier's College, Bangalore	5	25,000

### Top Location Leads

City	Leads
Bangalore	5

### Next Followups

### Upcoming Followups

# Branch Management

As its a multi level software. You have the functionality to create branches of your organization.

## All Branches

Branch Management > All Branches

- Dashboard
- Branch Management
  - All Branches
- Staff Management
- Payroll
- Holiday
- Attendance System
- Task Management

### All Branches

Home / Branch / Branches

Total (2) records.

Sl.No.	Code	Branch	Location	Email	Status	Actions
1	0001	Old Road Branch	Bangalore	old@prakashcollege.com	ACTIVE	<input type="button" value="edit"/> <input type="button" value="delete"/>
2	0002	New Road Branch	Bangalore	new@prakashcollege.com	ACTIVE	<input type="button" value="edit"/> <input type="button" value="delete"/>

Showing 1 to 20 of 2 entries

In this screen, you can see all are the existing branches along with add, edit/update and delete/undo the record button.

**Add:** On the right side of the screen you have a button (blue color) "Add New Branch".

**Edit/Update:** Every row has it's own edit button. Find a column "Actions" in the record table.

**Delete:** The same way you have delete button. After pressing it you get a confirm window. If you hit "OK", the record gets delete.

**Undo:** You can undo your action and get the record back.

**Status:** If the status is inactive. Branch will not be able to access his account and their staffs too.

## Create a New Branch Form

### Add New Branch

[Home](#) / [Branch](#) / [All Branches](#) / Add New

---

#### Add Branch \* mandatory

Branch Code *	<input type="text"/>	Address	<input type="text"/>
Branch Name *	<input type="text"/>	City	<input type="text" value="-- None--"/>
Alternate name	<input type="text"/>	State	<input type="text" value="-- None--"/>
Phone no.	<input type="text"/>	Country	<input type="text" value="-- None--"/>
Mobile no.	<input type="text"/>	Pincode	<input type="text"/>

---


#### Assign Module(s)

Person name *	<input type="text"/>	Email Id *	<input type="text"/>
Username *	<input type="text"/>	Password *	<input type="text"/>

- Staff Management
  - Groups  Accounts
- Payroll
  - Pay Now  History
- Holiday
  - + Add New Holiday  All Holidays
- Attendance System
  - Today's  History
- Task Management
  - Assign New Task  Pending Tasks  Completed  All Tasks
- College Management
  - Colleges  Fees

---

#### Images & Documents + ADD MORE

#	Sl.No	Document Name *	File *
	1		<input type="text" value="Choose File"/> No file chosen

In this screen, you can add the branch information such as branch name, code, contact and location. Can create an account by providing

# Staff Management

Staff management has two sub modules called "Groups" and "Accounts".

## Staff Groups

Staff Management > Groups

Sl.No.	Branch	Name	Notes	Status	Actions
1	BR001	Group B	Managing Leads and Followups	ENABLE	<a href="#">✎</a> <a href="#">✖</a>
2	BR001	Group A	Handling Leads & Colleges	ENABLE	<a href="#">✎</a> <a href="#">✖</a>

In this screen, you can manage existing staff groups. Groups can be used to differentiate access of modules and roles.

## Create a New Group Form

**Add new Group**

Branch \*  
BR001 (Parent Major Branch)

Group Name \*  
\_\_\_\_\_

Description  
\_\_\_\_\_

Status \*  
Enable

Roles \*  
 Add  
 Edit / Update  
 Delete  
 View  
 View All

**Assign Module(s)**

Staff Management  
 Groups  Accounts

Payroll  
 Pay Now  History

Holiday  
 + Add New Holiday  All Holidays

Attendance System  
 Today's  History

Task Management  
 Assign New Task  Pending Tasks  Completed  All Tasks

College Management  
 Colleges  Fees

Lead Management  
 Today's Leads  Active Leads  Closed Leads  All Leads

In this screen, you can create a group. Every branch has to create his own groups.

## Roles

**Add:** Have right to insert/create/add the record.

**Edit/Update:** Have right to edit/update the record. Staff can only edit those records which were added by him until he has the right to view all records.

**Delete/Undo:** Have right to delete/undo the record. Staff can only delete/undo those records which were added by him until he has the right to view all records.

**View:** Have right to view are the records which were added by you.

**View All:** Have right to view all are the records.

## Staff Accounts

Staff Management > Accounts

- Dashboard
- Branch Management
- Staff Management
  - Groups
  - Accounts
- Payroll
- Holiday
- Attendance System

### Accounts

Home / Staff / Accounts

[+ ADD NEW ACCOUNT](#)

**Accounts**  
Total (2) records.

Sl.No.	Branch	Account ID	Group	Name	Email ID	Status	Joined At	Actions
1	Branch	1488714241	Group B	Ramesh	ram@hrmangram.com	ENABLE	01-01-2019	<a href="#">✎</a> <a href="#">✖</a>
2	Branch	1488714242	Group A	Rang, Ashi	rang@hrmangram.com	ENABLE	01-12-2019	<a href="#">✎</a> <a href="#">✖</a>

In this screen, you can manage existing staff accounts.

## New Account Form

Branch \*

---

**Basic**

Full Name \*

Gender \*

Date of Birth

Email Address \*

Mobile Number \*

**Location**

Address \*

City

State

Country

Pincode \*

**For office**

Account ID \*

Designation

Date of Joining \*

Date of Leaving

Remarks

**Account**

Staff Group \*

Username \*

Password \*

Re-type Password \*

Status \*

---

**Leaves**

Allow Leave * <input type="text" value="10-01-2019"/>	Casual Leaves (CL) * <input type="text" value="10"/>	Sick Leaves (SL) * <input type="text" value="8"/>	Max. Leaves Allow * <input type="text" value="7"/>
---	--	---	--

---

**Salary Details**

Basic Pay * <input type="text"/>	Medical Allowance <input type="text"/>	Provident Fund <input type="text"/>	Loan <input type="text"/>
DA <input type="text"/>	Transport Allowance <input type="text"/>	E.S.I. <input type="text"/>	TDS/IT <input type="text"/>
HRA <input type="text"/>		Professional Tax <input type="text"/>	

In this screen, you can create a staff account and add all are the information such as general, contact and location, leaves, salary etc. Upload the documents.

## Important

**Staff Group:** Assign a group.

**Allow Leave:** Define a date from which he can apply for leaves.

# Payroll

Payroll has two sub modules called "Pay Now" and "History".

## Pay Now

Payroll > Pay Now

**Add Payment**
\* mandatory

---

Branch \*

Staff \*

Receipt	Staff	Month	Salary	Payment	Date	Status
1358526165	Surya Jan [Lead]	March, 2017	21,112	Cheque 102455	14.04.2017	Processed

Attendance between : 01.03.2017 - 31.03.2017

01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri
P	P	P	-	-	P	P	UPL	P	NCNS	-	-	P	P	P	P	P	-	-	CL	P	CL	SL	SL	-	-	P	P	-	-	-

Present: 14 days      Absent: 6 days      CL: 2      SL: 2      NCNS: 1      UPL: 1

### Salary Details

Year	<input type="text" value="2017"/>		<b>Per Day Salary : Rs. 763</b>
Month	<input type="text" value="March"/>		No. of Days Salary * <input type="text" value="26"/>
Basic pay *	<input type="text" value="18000"/>	Medical Allowance	Net Salary * <input type="text" value="19838"/>
		<input type="text" value="2000"/>	Payable Amount * <input type="text" value="19838"/>
DA	<input type="text" value="1680"/>	Transport Allowance	Mode * <input type="text" value="Cash"/>
		<input type="text" value="2000"/>	Mode no <input type="text"/>
HRA	<input type="text" value="1200"/>	Other Allowance	Bank <input type="text" value="State Bank of India"/>
		<input type="text"/>	Payment Date * <input type="text"/>
<b>Deduction</b>			Payment Status * <input type="text" value="Processed"/>
Provident Fund	<input type="text" value="1000"/>	E.S.I.	
		<input type="text" value="0"/>	

In this screen, you can make a (Salary) payment.

## How it Works?

First, when you select a staff, the software will automatically fetch his previous salary payments (Maximum 3 records).

At the same time, will fetch staff's salary details like Basic Pay, HRA, DA, etc along with no. of working days. You can update it later.

At the same time, will provide you the attendance information for this month. You'll be able to see his Leaves & presents.

**Short Form:** Casual Leave (CL) | Sick Leave (SL) | No Call, No Show (NCNS) | Unpaid Leave (UPL)

**Auto Calculation:** If you make any change within the salary related fields the software will auto calculate per day salary, Net salary and payable amount.

**Advance:** If staff has taken some advance amount that you can add it and that amount will be minus from the net salary amount and you can see the final payable amount.

**Mode No.:** This field can use to keep reference no. or transaction no. or cheque no. etc.

**Mode:** you can define it in the Master > Localizations > Payment Modes.



**Bank:** you can define it in the Master > Localizations > Bank Names.

**Payment Status:** you can define it in the Master > Localizations > Payment Statuses.

## Payment History

Payroll > History

The screenshot shows the 'Payroll' section of a software interface. On the left is a sidebar menu with options: Dashboard, Branch Management, Staff Management, Payroll (selected), Pay Now, and History. The main content area is titled 'Payroll' and shows 'All Payments' with 'Total (1) records.' Below this is a table with the following data:

Sl.No.	Branch	Receipt	Staff	Month	Salary	Payment	Date	Status	Actions
1	B0001	1398528165	Sung, Jahn [Lead]	March, 2017	21,112	Cheque 102458	14.04.2017	Processed	 

In this screen, you can find payment history.

## Holiday

Holiday has two sub modules called "Add New Holiday" and "All Holidays".

### Add New Holiday

Holiday > + Add New Holiday

#### Add Holiday

\* mandatory

Type \*

-- None--

Event Date \*

Event \*

Description

SAVE DETAILS

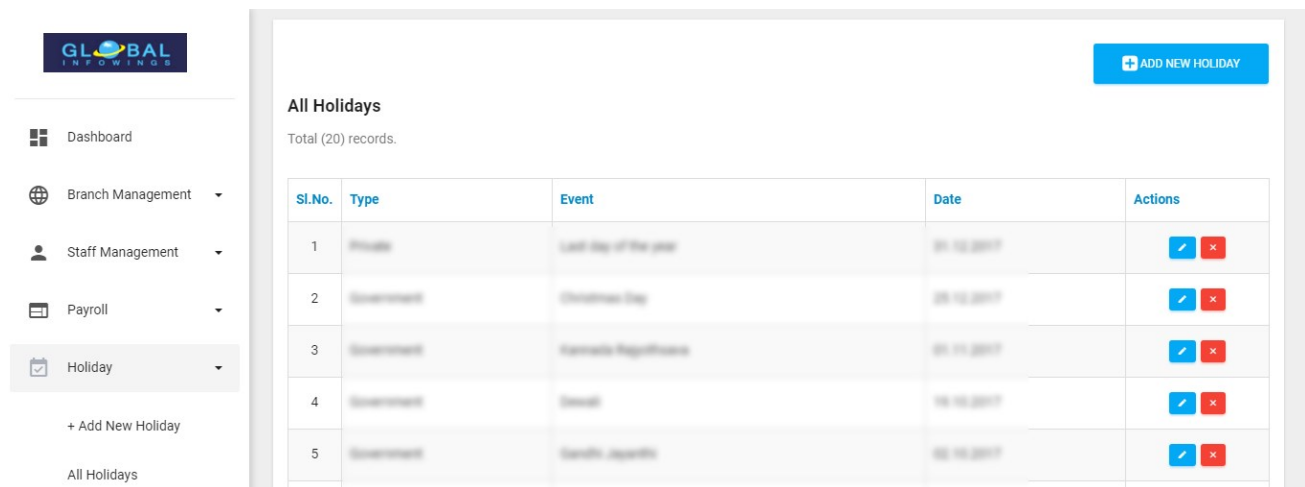
CANCEL

In this screen, you can add a new holiday.

**Event type:** , you can define it in the Master > Localizations > Event Types.

## List Of Holidays

Holiday > All Holidays



Sl.No.	Type	Event	Date	Actions
1	Private	Last Day of the year	31-12-2017	<a href="#">Edit</a> <a href="#">Delete</a>
2	Government	Christmas Day	25-12-2017	<a href="#">Edit</a> <a href="#">Delete</a>
3	Government	Easter Monday	01-11-2017	<a href="#">Edit</a> <a href="#">Delete</a>
4	Government	Good Friday	14-04-2017	<a href="#">Edit</a> <a href="#">Delete</a>
5	Government	Good Friday	14-04-2017	<a href="#">Edit</a> <a href="#">Delete</a>

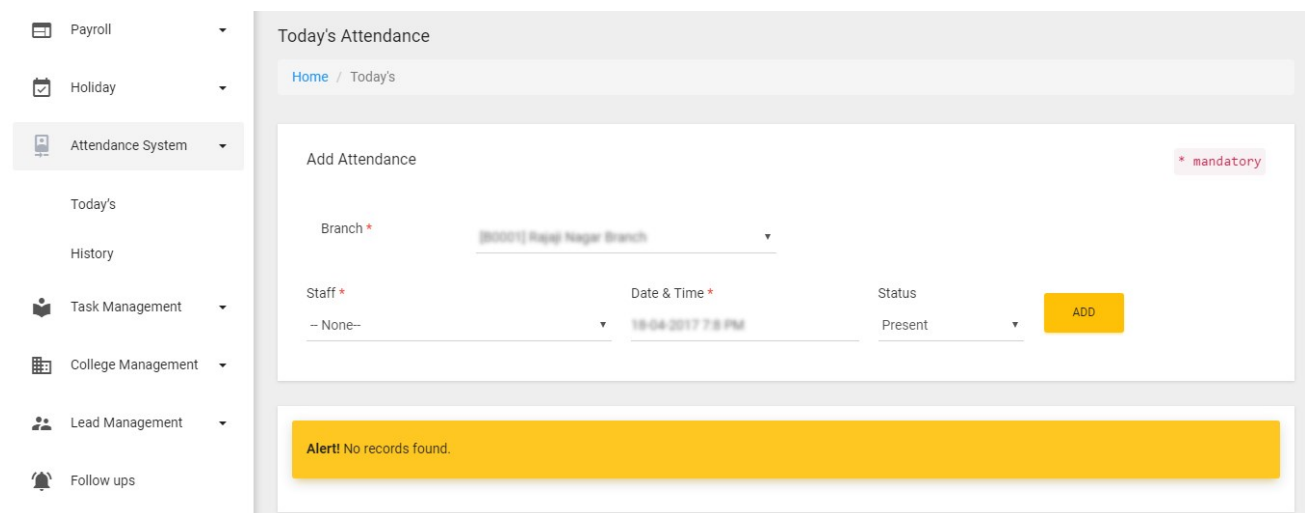
In this screen, you can see all the holidays.

# Attendance System

Attendance System has two sub modules called "Today's" and "History".

## Today's Attendance

Attendance System > Today's



Today's Attendance

Home / Today's

Add Attendance \* mandatory

Branch \*

Staff \*

Date & Time \*

Status

**Alert!** No records found.

In this screen, you can find today's attendances and It has a form to add an attendance.

## Add Attendance form

Attendance System > Today's



Add Attendance \* mandatory

Branch \* 200001 Head Office Branch

Staff \* -- None-- Date & Time \* 18/08/2017 12:38 PM Status Absent Leave Sick leave (SL)

Comments ADD

This form allows you to add an attendance.

**Works :** Starts from select a staff, date, time and status. If status is absent, You have a selection list to choose a leave type and write your comments. Every staff has some number of Casual and Sick leaves. Accordingly software will provide you the information whether he can take a leave as a SL / CL. It depends on date too. If company does not allow you to take a leave (CL / SL) from this date. You can not take a leave.

**Leave Type :** you can define it in the Master > Localizations > Leave Types.

## History

Attendance System > History

**History**  
Total (20) records.

Sl.No.	Branch	Staff	Date	Time	Status	Leave	Comments	Actions
1	200001	King Jan (SL)	26/08/2017	12:38 PM	Present			
2	200002	Rebecca (SL)	26/08/2017	12:38 PM	Absent	Unpaid leave (UPL)		
3	200001	King Jan (SL)	27/08/2017	06:57 PM	Present			
4	200002	Rebecca (SL)	27/08/2017	12:49 PM	Present			
5	200001	King Jan (SL)	28/08/2017	01:35 PM	Absent	Sick leave (SL)		
6	200001	King Jan (SL)	29/08/2017	01:35 PM	Absent	Sick leave (SL)		
7	200001	King Jan (SL)	30/08/2017	01:35 PM	Absent	Casual leave (CL)		
8	200001	King Jan (SL)	31/08/2017	01:35 PM	Present			
9	200001	King Jan (SL)	26/08/2017	01:34 PM	Absent	Casual leave (CL)		

In this screen, you can see attendance history.

# Task Management

Task Management has four sub modules called "Assign New Task", "Pending Tasks", "Completed" and "All Tasks".

## Assign New Task

Task Management > Assign New Task

**Add Task** \* mandatory

Branch \* 200001 Head Office Branch

Type *	-- None--	Priority	Normal (5)
Sub Type *	-- None--	Start Date *	
Assign to *	-- None--	End date *	
Task *		Status *	Assigned
Description			

In this screen, you can assign a task to staff.

### Details

**Function:** When you assign a task to staff. Staff will get a notification in his personal notification list.

**Type:** you can define it in the Master > Localizations > Task Types.

**Sub Type:** you can define it in the Master > Localizations > Task Sub Types.

**Status:** you can define it in the Master > Localizations > Task Statuses.

### Updates & Feedback

You can find this screen when you view any task. this screen can only view and update by an assigner.

#### Staff Updates

Status	
Comments	

#### Assigner Feedback

Status \*

Comments

In this screen, you can check staff's updates and assigner can give his feedback for this job.

### Pending Tasks

Task Management > Pending Tasks

In this section, you can find pending tasks. Pending tasks are those which are not completed by the staff since 7 days.

### Completed Tasks

Task Management > Completed

In this section, you can find completed tasks.

## All Tasks

Task Management > All Tasks

**All Tasks**

Home / Tasks

[+ ADD NEW TASK](#)

**All Tasks**

Total (2) records.

Sl.No.	Branch	Task ID	Type	Task	Assign to	End	Status	Assigner	Actions
1	00001	02	General - Student	Testing Task	[Assign User]	28/06/2017	ASSIGNED	-	<a href="#">✓</a> <a href="#">✗</a>
2	00001	01	General - Student	Parents Meet	[Assign User]	28/06/2017	COMPLETED	COMPLETE	<a href="#">✓</a> <a href="#">✗</a>

Showing 1 to 20 of 2 entries

In this screen, you can see all the tasks.

# College Management

College Management has two sub modules called "Colleges" and "Fees".

## Colleges

College Management > Colleges

**All Colleges**

Home / College / Colleges

[IMPORT](#) [+ ADD NEW COLLEGE](#)

**All Colleges**

Total (1) records.

Sl.No.	College ID	College	Location	University	Status	Actions
1	0000002	000000000	Bangalore	000000000	ACTIVE	<a href="#">✓</a> <a href="#">✗</a>

Showing 1 to 20 of 1 entries

In this screen, you can find all the colleges. This screen has one additional option to add multiple colleges through a ".csv" file called "Import".

## Import Colleges

[IMPORT](#) [+ ADD NEW COLLEGE](#)

### File to Import:

- A file's name must end in `[format]` | Example: `.csv`
- Maximum number of records allowed: 200
- First row must have column names.
- Sample file: [Download](#)

Browse your computer \*

Choose File No file chosen

UPLOAD

CANCEL

### Field Information:

Column	Format
Name	Alphanumeric   max:150
College id	Alphanumeric   max:30
Phone Number	Alphanumeric   max:250   Add multiple separated by comma
Mobile Number	Alphanumeric   max:250   Add multiple separated by comma
Email Address	Alphanumeric   max:750   Add multiple separated by comma
Country	Alphanumeric   max:20
State	Alphanumeric   max:50

In this screen, you can import minimum 1 and maximum 200 colleges through .csv file. Important instructions is available in this screen.

## Add College Form

This is another way to add college.

### Add College

College ID *	<input type="text"/>	Email Id	<input type="text"/>
College Name *	<input type="text"/>	Phone no.	<input type="text"/>
University name	<input type="text"/>	Mobile no.	<input type="text"/>
University Id	<input type="text"/>	Address	<input type="text"/>
University Type	<input type="text"/>	City	<input type="text" value="- None-"/>
Admission Start	<input type="text"/>	State	<input type="text" value="- None-"/>
Admission End	<input type="text"/>	Country	<input type="text" value="- None-"/>
Accredited By	<input type="text"/>	Website	<input type="text"/>
established	<input type="text"/>	Status	<input type="text" value="Active"/>

## Reviews

Total Reviews

Overall

Academic

Infrastructure

Accomodation

Placement

Faculty

social\_review

## Other

Departments

---

Placement

---

Gallery Link

---

Video Link

---

E-broucher Link

## Information

Eligibility  
Criteria

---

Fee Details

---

Scholarship

---

Faculty Details

In this form, you can add all the college information like university, contact & location information, reviews, gallery, video and broucher links. College logo and other documents can upload.

## Course Fees

College Management > Fees

- Attendance System
- Task Management
- College Management
  - Colleges
  - Fees
- Lead Management
- Follow ups
- Admissions

### Fees

Home / College / Fees

[+ ADD NEW](#)

**Fees**  
Total (2) records.

Sl.No.	College ID	College	Course	Fee	Status	Actions
1	U000002	Uttam University, Bangalore	Bachelor of Engineering	Rs. 4,00,000	ACTIVE	<a href="#">✎</a> <a href="#">✖</a>
2	U000002	Uttam University, Bangalore	Bachelor of Technology [B.Tech]	Rs. 3,00,000	ACTIVE	<a href="#">✎</a> <a href="#">✖</a>

Showing 1 to 20 of 2 entries

In this screen, you can find all the course's fees.

## Add Course Fee

### Add Fee

College \*

Uttam University, Bangalore

Course \*

-- None--

Donation

---

Commission on \*




DONATION

Commission type \*

PERCENTAGE (%)





Sl.No.	Branch	Lead	Name	Mobile & Email	Interested	Source	Status	Actions
1	BE	Suraj Jain (BE) 2017 Bangalore	Vivek Rathor	9591039100 mail.surajain@gmail.com	Bachelor of Engineering	Website	IN PROCESS	  

Showing 1 to 20 of 1 entries

In this screen, you can see every leads.

**Bell Icon:** Click to see complete lead information like follow ups, admission and can create a new follow up for this lead.

### All Follow ups

Total (4) records.

Date	Time	Subject	Comments	Handled By	Actions
27/02/2017	01:13 PM	Next - 27.02	Follow up on next date	Suraj Jain (Lead)	<div style="border: 1px solid #ccc; padding: 2px;">Closing Comments</div> <div style="text-align: right;"><a href="#">CLOSE</a></div>
27/02/2017	01:05 AM	Next - 26.02	follow up on next date	Suraj Jain (Lead)	<a href="#">OPEN</a>
24/02/2017	02:00 PM	Need to meet client	client wants to come down to our office. call him and confirm the meeting.	Suraj Jain (Lead)	<a href="#">CLOSED</a>
23/02/2017	01:00 PM	Need to get Approval	ask him to meet and get the approval for college.	Suraj Jain (Lead)	<a href="#">CLOSED</a>

Lead	Suraj Jain (BE) 2017 Bangalore
Admission	ID # <a href="#">AT-18202017</a>
Comments	He is ready to take an admission
Interested in	Bachelor of Engineering
Name	Vivek Rathor
Email	mail.surajain@gmail.com
Mobile	9591039100
Address	11/8, 2nd floor, 1st main Bangalore Karnataka India 560068
Status	<div style="border: 1px solid #ccc; padding: 5px;">           In Process <span style="float: right;">▼</span> </div> <div style="text-align: center; margin-top: 5px;"><a href="#">CHANGE</a></div>

### Create Follow Up

Date & Time \* Assign to \*

\_\_\_\_\_ -- None-- ▼

Subject \*

\_\_\_\_\_

Comments

\_\_\_\_\_

[CREATE](#)

# Follow Ups

- Attendance System
- Task Management
- College Management
- Lead Management
- Follow ups
- Admissions
- Billing & Payments
- Reports

### Follow Ups

[Home](#) / [Follow Ups](#)

#### Follow ups

Total (2) records.

Sl.No.	Customer	Date	Subject	Comments	Handled By	Actions
1	Vishal Reddy vishal.singh@gmail.com 9886228132	27-02-2017 01:12:49	Lead - 27-02	Follow up on next date	Vishal Reddy	<input type="text" value="Closing Comments"/> <input type="button" value="CLOSE"/>
2	Vishal Reddy vishal.singh@gmail.com 9886228132	27-02-2017 01:08:48	Lead - 26-02	Follow up on next date	Vishal Reddy	<input type="button" value="OPEN"/>

Showing 1 to 20 of 2 entries

In this screen, you can see complete follow up list. Basically, this module will help you to access all the lead's Follow ups and you can close the follow up with / without closing comments.

# Admissions

- Attendance System
- Task Management
- College Management
- Lead Management
- Follow ups
- Admissions
- Billing & Payments

### Admissions

[Home](#) / [Admissions](#)

#### All Admissions

Total (1) records.

Sl.No.	Branch	College	Course	Fees	Name	Admission Dt	Status	Actions
1	00001	Global University	Bachelor of Engineering	4,00,000	Vishal Reddy	26-02-2017	ADMITTED	<input type="button" value="✓"/> <input type="button" value="✗"/>

Showing 1 to 20 of 1 entries

In this screen, you can see all the admissions and can update the record.

# Billing & Payments

Billing & Payments has two sub modules called "Make New Payment" and "Payment History".

## Make New Payment

Billing & Payments > + Make New Payment

### Add Payment

\* mandatory

Branch \*

Search by

Name

Name \*

Email Id \*

Mobile no. \*

### Bill Details

Bill Type  Amount \*

Title \*  Mode \*

Comments  Mode no

Company Name  Bank

Payment Date \*

In this screen, you can add bill and payment information.

**Search:** You can search an existing customer or if it's a new customer you can add his name, email and mobile number.

**Bill Type:** you can define it in the Master > Localizations > Bill Types.

## Payment History

Billing & Payments > Payment History

- College Management
- Lead Management
- Follow ups
- Admissions
- Billing & Payments
- + Make new Payment
- Payment History

### Billing & Payments

[Home](#) / Billing & Payments

#### All Payments

Total (1) records.

Sl.No.	Branch	Receipt	Customer	Type	Bill	Amount	Payment	Actions
1	SRMIST	<a href="#">View Receipt</a>	SRMIST Student	Fees	Admission Fee	10000	Cash 28-08-2017	<span style="color: red;">✕</span>

In this screen, you can find all the previous payments.

## Reports

There are six types of report.

- Colleges
- Leads
- Staff Performance
- Follow Ups
- Customer Payments
- Staff Salary

### Filter

**Filter**

---

Branch \*

---

From  To  City  State

11/06/2017 18/06/2017 All Cities All States

Status: All Statuses ▼      Order by: Old to New (Ascending) ▼

[GET REPORT](#)

In this screen, you can use the filter to reducing the amount of data. Filters can be used to narrow down the data in your worksheet, allowing you to view only the information you need.

**Search:** Search by keywords

**Date Range:** Filter data between dates.

**Status:** Sort data by the status.

**Order By:** Arrange the data ascending and descending order.

## Data

email address  [EMAIL](#) [PRINT](#) [DOWNLOAD](#)

**Colleges report (1)**

#	College ID	College	University	Established	City	Status	Dated On
1	00000001	00000001	00000001	1999	Bangalore	Active	01/02/2017

In this screen, you can see the college report.

You have the option to delete the particular column(s) in the report table.

You can Email / Print the report.

You can Download the report in Excel format.

# Master

Master has two sub modules called "Courses" and "Localizations".

## List of Courses

Master > Courses

- [Billing & Payments](#)
- [Reports](#)
- [Master](#)
- [Courses](#)
- [Localizations](#)

Courses
Home / Master / Courses

[+ ADD NEW COURSE](#)

**Courses**  
Total (2) records.

Sl.No.	Name	Duration	Type	Rating	Status	Actions
1	Bachelor of Engineering	8 Sem	Full Time	4.2	ACTIVE	<a href="#">✎</a> <a href="#">✖</a>
2	Bachelor of Technology [B.Tech]	4 Years	Full Time	4.0	ACTIVE	<a href="#">✎</a> <a href="#">✖</a>

In this screen, you can find all the courses.

## Add New Course

### Add new Course

Name \*

Duration type \*

YEAR

Duration \*

Course type \*

FULL TIME

Rating

Remarks

Status \*

ENABLE

In this screen, you can add course with ratings and remarks.

**Duration type:** YEAR / SEM.




**Duration:** Enter total years or no. of semesters. Based on Years or semesters you will get an option while you add the course fees.

**Course Type:** you can define it in the Master > Localizations > Course Types.

## Localizations

Master > Localizations

Currently, we are having 18 local data types.

 Billing & Payments	
 Reports	
 Master	
Courses	
Localizations	

### Localizations

[Home](#) / [Master](#) / Localizations

Type	Total	Actions
Cities	48	<a href="#">View</a>
States	19	<a href="#">View</a>
Countries	1	<a href="#">View</a>
Designations	2	<a href="#">View</a>
Sources	8	<a href="#">View</a>
Lead Types	1	<a href="#">View</a>
Lead Statuses	4	<a href="#">View</a>
Admission Statuses	4	<a href="#">View</a>

















In this screen, you can find all the data types and settings. This is very important module of this software. If you want to add any local value, click on view last column in the data table.

When you click on view you will redirect to this screen.

 ADD NEW

### Cities

Total (20) records.

Sl.No.	Name	Status	Actions
1	Hubli	<span>ENABLE</span>	 
2	Agra	<span>ENABLE</span>	 
3	Ghaziabad	<span>ENABLE</span>	 
4	Fatehpur	<span>ENABLE</span>	 
5	Kanpur	<span>ENABLE</span>	 
6	Lucknow	<span>ENABLE</span>	 
7	Shimla	<span>ENABLE</span>	 
8	Dharanohala	<span>ENABLE</span>	 

In this screen, you can find all the local values. Please try not to delete anything. If you change anything here that will reflect everywhere in the software.

### Add New Local Value

This is an example how to add city?


#### Add new

Name \*

State \*

– select – 

Status \*

Enable 

SAVE DETAILS

CANCEL

In this screen, you can add a city along with it's state.

# My Account

Every account has their own account information page through which you can update your personal and account details.

## My Account

### Welcome Dyutiman!

#### Personal Details

Full name

Dyutiman

Mobile No.

9988998899

Date of Birth

Email ID

example@gmail.com

PAN Number

#### Account Details

Screen name

Dyutiman

Username

your-username



CEO / CO-FOUNDER

Dyutiman

Activate

Administrator

FOLLOW

In this screen, you can find the account details.

## Change Password

### Change Account Password

Current Password

New Password

Re-type Password

SUBMIT

In this screen, you can enter your new password and change it.

## Recent Activities

### Recent Activity

Last 50 activities.

Sl.No.	Task	Created At
1	College Report - New Report	18 Apr,17 @07:33 PM
2	Admissions - Undo Admission	18 Apr,17 @07:29 PM
3	Admissions - Delete Admission	18 Apr,17 @07:29 PM
4	Staff Performance Report - New Report	15 Apr,17 @01:56 AM
5	Staff Performance Report - New Report	15 Apr,17 @01:46 AM
6	Staff Performance Report - New Report	15 Apr,17 @01:46 AM
7	Staff Performance Report - New Report	15 Apr,17 @01:46 AM
8	Staff Performance Report - New Report	15 Apr,17 @01:45 AM
9	Staff Performance Report - New Report	15 Apr,17 @01:45 AM
10	Staff Performance Report - New Report	15 Apr,17 @01:42 AM
11	Staff Performance Report - New Report	15 Apr,17 @01:40 AM
12	Staff Performance Report - New Report	15 Apr,17 @01:40 AM
13	Staff Performance Report - New Report	15 Apr,17 @01:40 AM
14	Staff Performance Report - New Report	15 Apr,17 @01:39 AM
15	Staff Performance Report - New Report	15 Apr,17 @01:38 AM
16	Staff Performance Report - New Report	15 Apr,17 @01:20 AM

In this screen, you can see the recent activities which you've done within the software.

## Staff Account

Staff account has two more additional modules like "(Salary) Payment History" and "My Task".

### Payment History

#### Salaries

Total (1) records.

Receipt	Month	Salary	Payment	Date	Status
1358526145	March, 2017	21,112	Cheque 102458	14.04.2017	Processed

Showing 1 to 20 of 1 entries

In this screen, you can find all the previous salary payments and can print the receipt.

### My Tasks

#### My Tasks

Total (2) records.

Sl.No.	Task ID	Type	Task	Assigned By	End	Status	Your Status
1	#2	General > Student	Testing Task	Dyutiman	25.04.2017	ASSIGNED	-
2	#1	General > Student	Parents Meet	Dyutiman	06.04.2017	COMPLETED	COMPLETE

Showing 1 to 20 of 2 entries

In this screen, you can find all the task which has been assigned to you.

## Update Task Status

Type	General > Student
Task	Testing Task
Description	Testing task informations
priority	Normal (5)
Assinged by	Dyutiman
Start Date	18.04.2017
Completion Date	25.04.2017
Status	ASSIGNED

### Update task status

Status \*

Comments

UPDATE DETAILS

CANCEL

In this screen, you can add your comments and update the status. You can update the status & comments till you mark it as completed.

## Task Information


Type	General > Student
Task	Parents Meet
Description	Hello Sunj, Please call every student's father and arrange a meeting with them.
priority	Normal (5)
Assinged by	Dyutiman
Start Date	03.04.2017
Completion Date	06.04.2017
Status	COMPLETED

### Your Updates

Status	Complete
Comments	I've invited all the parents.

In this screen, you can view task information and your updated status.

## Salary Receipt



**Global Infowings**  
 Head Office #227, 2nd Floor, Raheja Arcade  
 Koramangala Bangalore  
 Karnataka, India - 560095  
 www.globalinfowings.com  
 support@1987@gmail.com

**Salary Receipt**  
 #1358526165

Amount: Rs. 19,112

Paid by: **Cheque**

Ref. no: 102498

Date: 14.04.2017

Status: PROCESSED

EARNINGS	
Particulars	Amount (Rs.)
Basic Pay	18,000
D.A	1,000
H.R.A	1,200
Medical Allowance	2,000
Transport Allowance	2,000
Other	2,000
<b>Total Earnings</b>	<b>26,800</b>

DEDUCTIONS	
Particulars	Amount (Rs.)
Provident Fund	Rs. 1,200
Professional Tax	Rs. 200
Other	Rs. 500
<b>Total Deductions</b>	<b>1,700</b>

<b>NET SALARY (Rs.):</b>	<b>25,112</b>
<b>Advance:</b>	<b>2,000</b>
<b>PAYABLE SALARY Rs. in Amount:</b>	<b>19,112</b>
<b>PAYABLE SALARY Rs. in Figure:</b>	<i>Nineteen Thousand One Hundred &amp; Twelve only</i>

Note: This is software generated receipt.

PRINT

You can print the receipt.

## Bill Payment Receipt



**Global Infowings**  
 Head Office #227, 2nd Floor, Raheja Arcade  
 Koramangala Bangalore  
 Karnataka, India - 560095  
 www.globalinfowings.com  
 support@1987@gmail.com

**Receipt #** 10661380498

Amount: Rs. 10,000

Paid by: **Cash**

Date: 14.04.2017

Status: PROCESSED

Bill	Amount
Admission Fee	Rs. 10,000

Note: This is software generated receipt.

PRINT

You can print the receipt.

**The End**

# Greetings

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