



Username:

Password:

Login

Types of Login

```
graph TD; A[Types of Login] --> B[1. BH / Company Login]; A --> C[2. Employee Login]; A --> D[3. SPOC Login]; A --> E[4. Facilitator Login]; A --> F[5. Admin Login];
```

1. BH / Company
Login

2. Employee
Login

3. SPOC
Login

4. Facilitator
Login

5. Admin
Login

Types of Login

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Login



-  Dashboard
-  Reservoir 
-  Employees
-  Worklog 
-  Business Sarthi 
-  Account Setting

June 2024 

Back Office Services Acknowledged

115

Back Office Services Closed

102

Front Office Services

56

[View more >](#)

Business Opportunities Opened

18



-  Dashboard
-  Reservoir 
-  Employees
-  Worklog 
-  Business Sarthi 
-  Account Setting

Dashboard

Company 1 [learn more](#)

Log out

Back Office Services Acknowledged

115

Back Office Services Closed

102

Front Office Services

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[View more v](#)

Business Opportunities Opened

18

No. of Business Closed
from Existing Client Goal
Review and Audit
meetings

52

No. of Business
opportunities closed from
ECS info-updates activity

34

NCA acquired from 7 step
process

22

No. of new leads added
from ECS referrals

43



 Dashboard

 Reservoir 

NCA Reservoir

ECS Reservoir

 Employees

 Worklog 

 Business Sarthi 

 Account Setting



 Dashboard

 Reservoir 

NCA Reservoir

ECS Reservoir

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 Account Setting

Reservoir > NCA Reservoir

Company 1 [learn more](#)

Log out

+ Add New

Sr. No.	Month	Date	Name	Age Group	Gender



 Dashboard

 Reservoir 

NCA Reservoir

ECS Reservoir

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Reservoir > NCA Reservoir

Company 1 [learn more](#)

Log out

+ Add New

Gender	Marital Status	Occupation	Income Group	Dependants	Area





 Dashboard

 Reservoir 

NCA Reservoir

ECS Reservoir

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 Account Setting

Reservoir > NCA Reservoir

Company 1 [learn more](#)

Log out

+ Add New

Area	Source of data	Source Description	Assigned to	Remarks





 Dashboard

 Reservoir 

NCA Reservoir

ECS Reservoir

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Reservoir > ECS Reservoir

Company 1 [learn more](#)

Log out

+ Add New

Sr. No.	Name	RM / Team	Client Creation Date	Client Pro	
				Age Group	Gender



 Dashboard

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Reservoir > ECS Reservoir

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Log out

+ Add New

Sr. No.	Name	RM / Team	Client Creation Date	Client Pro	
				Age Group	Gender



 Dashboard

 Reservoir 

NCA Reservoir

ECS Reservoir

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Reservoir > ECS Reservoir

Company 1 [learn more](#)

Log out

ECS Reservoir

- 1. Sr. No.
- 2. Name
- 3. RM/Team
- 4. Client Creation Date
- 5. Client Profile
 - 1. Age group
 - 2. Gender
 - 3. Marital Status
 - 4. Occupation
 - 5. Income Group
 - 6. Dependants
 - 7. Contact Number
 - 8. Area
 - 9. Source
 - 10. Source Description



 Dashboard

 Reservoir 

NCA Reservoir

ECS Reservoir

 Employees

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 Account Setting

Reservoir > ECS Reservoir

Company 1 [learn more](#)

Log out

ECS Reservoir

- 6. Products to be serviced
 - 1. AUM of Client
 - 2. Goals Mapped
 - 3. Term
 - 4. Health
 - 5. SIP
 - 6. SWP Corpus
 - 7. PMS
 - 8. LAS
 - 9. LI Premium (Saving Plan)
 - 10. ULIPs
- 7. Touchpoints
 - 1. Retirement Goal
 - 1. Audit
 - 2. Review
 - 2. Wealth Protection Goal
 - 1. Audit
 - 2. Review



Employees

Company 1 [learn more](#)

Company 1 [learn more](#)

Log out



Dashboard



Reservoir



Employees



Worklog



Business Sarthi



Account Setting

+ Add New

[illegible]



Sparrow's Sprout
BH / Company Login












-  Dashboard
-  Reservoir 
-  Employees
-  Worklog 
-  Business Sarthi 
-  Account Setting

Worklog

Company 1 [learn more](#)

Log out



-  Dashboard
-  Reservoir 
-  Employees
-  Worklog 
- Back Office
- Front Office
-  Business Sarthi 
-  Account Setting



 Dashboard

 Reservoir 

 Employees

 Worklog 

Back Office

Front Office

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Worklog

Company 1 [learn more](#)

Log out

+ Add New

Sr. No.	Month	Date	Client Name	RM Name	Process





 Dashboard

 Reservoir 

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Company 1 [learn more](#)

Log out

+ Add New

Process	Instrument Type	Service Type	Service Description	Stakeholder Type	Stakeholder Description





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Company 1 [learn more](#)

Log out

+ Add New

Stakeholder Description	Service Medium	Remark	Closing Date	Turn Around Time (TAT)	Business Opportunities opened





 Dashboard

 Reservoir 

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Back Office

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 Account Setting

Log out

+ Add New

Sr. No.	Month	Date	Client Name	Process	Meeting Medium





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Company 1 [learn more](#)

Log out

+ Add New

Meeting Medium	Activity Type	Activity for Goal	Tools Used	Description	
					New Demat





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Log out

+ Add New

Business Opportunities Opened (Soft Commitment)					
New Demat	SIP	Lumpsum	SWP	Term	Mediclaim





 Dashboard

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Log out

+ Add New

Business Opportunities Opened (Soft Commitment)					Notes
SWP	Term	Mediclaime	Referral	Others	





 Dashboard

 Reservoir 

 Employees

 Worklog 

 Business Sarthi 

Part 1

Part 2

 Account Setting

Home

Team 1 [learn more](#)

Log out



 Dashboard

 Reservoir 

 Employees

 Worklog

 Business Sarthi 

Part 1

Part 2

 Account Setting

Home

Team 1 [learn more](#)

Log out

Section A:

Sub-section 1:

Sub-section 2:

Sub-section 3:

Sub-section 4:

Section B:

Sub-section 1:

Sub-section 2:

Sub-section 3:

Sub-section 4:



 Dashboard

 Reservoir 

 Employees

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Part 1

Part 2

 Account Setting

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Team 1 [learn more](#)

Log out

Section A:

Sub-section 1:

Tool Type	# Tool Name	View	Download	Video
Presentation	1 How to Conduct Survey?	View	Download	-
	2 Steps for Conducting Survey	View	Download	-
Steps	3 Steps for Asking Survey Questions	View	Download	-
	4 Family Financial Awareness Survey	PDF Excel	PDF Excel	Watch Video
Templates	5 Seven Questions Survey	PDF Excel	PDF Excel	Watch Video

Sub-section 2:

Sub-section 3:

Sub-section 4:



 Dashboard

 Reservoir 

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Part 1

Part 2

 Account Setting

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Team 1 [learn more](#)

Log out

Section A:

Sub-section 1:

Sub-section 2:

Sub-section 3:

Sub-section 4:

Section B:

Sub-section 1:

Sub-section 2:

Sub-section 3:

Sub-section 4:



 Dashboard

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Part 1

Part 2

 Account Setting

Log out

Section A:

Sub-section 1:

Tool Type	# Tool Name	View	Download	Video
Presentation	1 How to Conduct Survey?	View	Download	-
	2 Steps for Conducting Survey	View	Download	-
Steps	3 Steps for Asking Survey Questions	View	Download	-
	4 Family Financial Awareness Survey	PDF Excel	PDF Excel	Watch Video
Templates	5 Seven Questions Survey	PDF Excel	PDF Excel	Watch Video

Sub-section 2:

Sub-section 3:

Sub-section 4:



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Team 1 [learn more](#)

Log out

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-  Dashboard
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Team 1 [learn more](#)

Log out

June 2024



No. of days worked

23

Back Office Services Acknowledged

115

Back Office Services Closed

102

Front Office Services

56

Business Opportunities Opened

18



 Dashboard

 Reservoir 

NCA Reservoir

ECS Reservoir

 Worklog

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 Account Setting

NCA Reservoir

- 1. Sr. No.
- 2. Month
- 3. Date
- 4. Name
- 5. Age Group
- 6. Gender
- 7. Marital Status
- 8. Occupation
- 9. Income Group
- 10. Dependants
- 11. Contact number
- 12. Area
- 13. Source of Data
- 14. Source Description
- 15. Assigned to
- 16. Remarks



 Dashboard

 Reservoir 

NCA Reservoir

ECS Reservoir

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Reservoir > ECS Reservoir




Team 1 [learn more](#)

Log out

ECS Reservoir

- 1. Sr. No.
- 2. Name
- 3. RM/Team
- 4. Client Creation Date
- 5. Client Profile
 - 1. Age group
 - 2. Gender
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 - 4. Occupation
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 - 6. Dependants
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-  Dashboard
-  Reservoir 
- NCA Reservoir
- ECS Reservoir
-  Worklog
-  Business Sarthi
-  Account Setting

Reservoir > ECS Reservoir

Team 1 [learn more](#)

Log out








ECS Reservoir

- 6. Products to be serviced
 - 1. AUM of Client
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 - 4. Health
 - 5. SIP
 - 6. SWP Corpus
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 - 2. Review



Sparrow's Sprout
Employee Login



-  Dashboard
-  Reservoir 
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Team 1 [learn more](#)

Log out

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 Home

 Participants

 Worklog

 Setting

Home





Team 1 [learn more](#)

Log out

June 2024 

<div>No. of hours worked</div> <div>102 / 150</div>	<div>Individual Training Facilitated</div> <div>06</div>	<div>RM Review Meetings</div> <div>24 / 36</div>
<div>Monthly Closing done</div> <div>30 / 36</div>	<div>Skill Development</div> <div>20 / 36</div>	<div>New Workshop Participants</div> <div>18</div>



-  Home
-  Participants
-  Worklog
-  Setting

Home

Team 1 [learn more](#)

Log out

Filters

Company Name:

Select from the dropdown v

Coaching Level:

Select from the dropdown v

Batch Name:

Select from the dropdown v





Type:

Select from the dropdown v

Apply Filter

Participant Name	Company Name	Type	Coaching Level	Batch Name	Profile Link
Amitabh	AB Studio	Individual RM / MFD	Level 1	Andheri	View Profile
Dilip	Kumar & Sons	Business Head	Level 2	Ghatkopar	View Profile
Yash	C Company	Business Head	Level 3	Mulund	View Profile
Sridevi	Yashraj	Individual RM / MFD	Level 4	Panvel	View Profile
Kamal	Rebel Media	Business Head	Level 3	Fort	View Profile



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Home

Team 1 [learn more](#)

Log out

Photo	Name:	Amitabh:
	Company Name:	AB Studio
	Coaching Level:	Level 1
	Batch Name:	Andheri
	Type:	Individual RM / MFD

Goal

Actionable

Touchpoints



 Home

 Participants

 Worklog

 Setting

Home

Team 1 [learn more](#)

Log out

+ Add New

Sr. No.	Team Name	Date	Work Type	Work Type	Coaching Level	Batch Name



Home



Participants



Worklog



Setting

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Team 1 [learn more](#)

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Home



Participants



Worklog



Setting

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Team 1 [learn more](#)

Log out

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1. BH / Company
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5. Admin
Login



-  Dashboard
-  SPOC & Facilitator
-  Participants
-  Business Sarthi
-  Masters
-  Account Setting

Dashboard

Team 1 [learn more](#)

Log out

Back Office Services Acknowledged

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Business Opportunities Opened

18