

kapture

FLIPKART VAS L1 AGENTS USER MANUAL

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Kapture CX

What is a CX?

Typically, CX involves the analysis of vast amounts of data in order to analyze the interactions that a business or organization has with its customers.

Data from CX systems is compiled from various communication channels such as calls, emails, live chat, social media, etc.

Using a CX, businesses can better understand their target audiences and how to better serve them, retaining customers and increasing sales.

Kapture CX Overview

Kapture provides an efficient case system that can automate and streamline time-consuming tasks.

Kapture CX is the best CX available and is a complete solution that allows your company to manage and analyze interactions with your past, current, and potential customers. Kapture CX's all-in-one Customer Service platform has all the tools your teams need to deliver better and more intelligent customer service.

Kapture CX compiles data from a range of different communication channels, including a company's website, phone, email, live chat, and social media.

Kapture uses data analysis about customers' history with your company to improve business relationships with your customers, specifically focusing on customer retention and ultimately driving sales growth.

Goals of Kapture CX

Kapture helps you to prioritize, categorize, assign, and resolve incoming cases promptly to deliver personalized customer support experiences.

Scope of Kapture CX

Kapture provides an option to assign an SLA to your support team within which cases should be resolved. Kapture gives robust analytics using which you can easily find metrics like typical case resolution time under each channel, a channel with the highest case traffic, and lots more.



Being an omnichannel platform Kapture unifies all your cases coming from various sources - chat, email, social media, and calls on one platform. This helps your support agents to access and resolve cases faster.

Process Overview of Kapture CX

With Kapture CX, find out which cases need your attention the most by customizing the view into assigned, unassigned, or pending cases. You can set up multiple filters depending on different case properties like priority, status, type, and more.

Introduction

Training Manual

Training includes a case module of Kapture to provide you with a variety of information, ranging from basic access to cases to advanced steps to be followed.

This user guide is focused on describing features, functionality, and the application interface. It also includes a vast amount of advanced technical information and instructional topics that are designed to teach you how to use Kapture CX to accomplish your tasks.

Getting Started

This section provides information to help you get the most out of Kapture CX.

Getting Familiar with the Interface

Kapture CX includes several modules to help you accomplish a wide range of tasks. Each module also includes a large variety of different menu actions that can be performed.



Actions to be performed by L1 Agents

Login to your Account

How to Login?

An employee can log into the Kapture Account by adding the **email ID/username** and **password** of the employee as shown in the screenshot below.

For example, add:

- Email id <Email/UserName>
- Password <Password>

<image/> <section-header><section-header><section-header></section-header></section-header></section-header>	LOGIN TO YOUR ACCOUNT Email/UserName * Username Password * Password * Log in	
Figure: Account Login Screen		

The agents have to go Available

"Available" and "Not Available" show the accessibility or the availability of the agent when the ticket is assigned. An agent can choose "Available" to show their presence and "Not Available" for their absence.

How to go Available?

<u>Step 1</u>:

The "Not Available" status is shown with a white toggle button as shown in the screenshot given below.

Not Ava	-	FLIPKART JEEVES 🔻	≔
Figure: Not Available			

<u>Step 2</u>:

> Click on the toggle button to go "Available" as shown in the screenshot given below.



How to Go "Not Available"?

Step 1:

Click on the toggle button which is in the "Available" state, and the following drop-down list appears asking the reason to pause.

<u>Step 2</u>:

> Select a reason from the drop-down as shown in the screenshot given below. Click on "OK".



> The selected reason reflects under the toggle button as shown in the screenshot given below.



Review Notifications

The agents have to **review notifications**. A **notification bell** is used to receive notifications of incoming tickets, reminders, or callbacks.



How to Logout?

Step 1: Click on the user profile tab.

<u>Step 2</u>: A drop-down appears, select the **"Logout"** option to log out of the account.



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How to view a ticket?

When the agent logs into the account and clicks on the **"Ticket" tab** available on the left corner of the page, the following ticket page appears that contains the **Unassigned Ticket**, All Pending Ticket, All **Complete**, All Junk, and Assigned To Me, etc. When you select a ticket, its newly opened page is displayed on the same screen.

				Not Ava	FLIPKART JEEVES - 📃
::	← views 🕋 🕀	- =	Q Search tickets	1-47 of 47 I∢ ◀ 0	▶ ▶ Last Conversation ↓₹
	Unassigned All Pending		▶ PROC Inbox ▲ Flipkart Jeeves ■ 694692330330 • Unattended		Due Date: 14-09-2023 17:22 • Sep 14 Low • Email_Queue
¢	All Complete All Junk		▶eeor Inbox ▲ Flipkart Jeeves ● ● 694692330268 • Unattended ●		Due Date: 14-09-2023 17:22 • Sep 14
	Assigned to me Created by me Completed by me		PROC Inbox ▲ Flipkart Jeeves ● ● 694692314092 • Unattended		Due Date: 14-09-2023 17:21 • Sep 14
			▶excr Inbox ▲ Flipkart Jeeves ● ● 694692314019 • Unattended		Due Date: 14-09-2023 17:21 • Sep 14
	■Likorowseric Email Complaint Bill Not Given By Tech ▲ abhinav.gurukul@gmail.com 급 6694675643749 ÷ 2 · UnResolved ●www. Email ▲ abien.pudushery@kapturecrm.com 급 694671694816 - Replied		BULNOT GOMENTIC. Email Complaint Bill Not Given By Technician abhinav.gurukul@gmail.com 6694675643749 © 2 • UnResolved		Due Date: 14-09-2023 12:48 • Sep 14
			Ewat Email ▲ abien.pudushery@kapturecrm.com 〒 694671694816 - Replied		Due Date: 14-09-2023 11:38 • Sep 14
	Advanced Search		Reck Inbox		Due Date: 14-09-2023 11:30 • Sep 14

How L1 Agent Work on a VAS Created Ticket

1. Plus Sign - Add Ticket Option

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This **plus sign** allows you to add tickets.



2. Add Ticket Tab

Select the **"Add Ticket"** tab to initiate a manual ticket creation. The following ticket page will then be presented.



Note: An automated ticket will be generated for Call or Email Tickets.

• Let's now examine the "Value Added Services (VAS)" tab and discuss the features and functionalities that will be available for agents to work on the VAS module.

< ATION MAINTENANCE REPAIR	VAS >	🕞 More Info 🛛 🖪 🗿 🗊 🗉 🗄	
← PHONE → Q Search	Search	Customer Details 🔇	
		Name N/A	
		Mobile No N/A	
Š		Email N/A	
		Address N/A	
No Data Found			
		Past Tickets Sub Tickets	
		Search tickets Q $=$ < 0 >	
			G
		8	
		No Data Found	
			83

- The agent has to click on the VAS tab to search and find any information of customers related to VAS. Within VAS tab, agents can search for customer details using the following options provided:
 - <u>Phone</u>: Registered phone number(s) of customers
 - <u>Email</u>: Registered Email addresses of customers
 - <u>Policy ID</u>: A unique identifier for the policy which is created/tagged to the product purchased by the customer
 - <u>Claim ID</u>: A unique identifier for the claim/issue which is raised against the associated policy tagged to the particular product purchased by the customer

<	INSTAL	LATION	MAINTENANCE	REPAIR	VAS	>
÷	PHON	Phone Email Policy Id Claim Id	ie <mark>arch</mark>	5		Search

• Please note that the search results displayed after performing search by phone or email is a list of policies while search by policy id will result in specific policy and search by claim id will result in specific claim.

3. Phone and Email Search

Input any of the mentioned specifics (*Phone or Email*) and click on the **"Search"** button to initiate the search.

- PHON	Phone	3106717314	Search
	Email		
	Policy Id		
	Claim Id	5	

- Phone and Email: While performing a phone number or email search, agents should first select **phone** or **email** options from the search types and then input the <u>registered</u> <u>phone number</u> or <u>registered email address</u> of the customer and click on the 'Search' button to get the policy or claim details.
- The search results will display a <u>list of Policies</u> associated with the searched phone number or email address. Each of the Policy listed will have high-level information related to the Policy (*like policy ID, Type, Product, Brand etc.*) along with any Claims tagged to the policy
 - Agents can click on the 'View Policy' button to see the detailed view of policy
 - Similarly, agent can click on the accordion (*down arrow*) next to the Claim status to see an expanded view of Claim detail along with the link to access SRMS ticket details (*if available*)
 - Additionally, agents can view the customer information on the right side of page under the <u>Customer Details</u> section and any past tickets associated with the searched email id or phone number in the <u>Past Tickets</u> section

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< ATION MAINTEN	NANCE REPAIR	VAS >	C More Info	7 🗈 🗿	. ا	
← EMAIL ~ Q swas	sthik.prabhu@flipkart.com	Search	Customer Details	9		
Policy ID PEXFLK0B-7H990792 Policy Status ACTIVE Brand CROMA Plan Name Extended Warran	ZYDV3W5R7j8-24876125434 Type VA5 Start Date 2023-01-02 1ty	VIEW POLICY Product AC End Date 2025-01-02	Name Mobile No Email Address Past Tickets	Swasthik 897****** swa******** NANANANANANA, undefined , JAIPUR , Sub Tickets		
Claims			Search tickets	Q		< 0 >
CLAFLK-1J1740048M42BIYE	EPI-47337757849					9
Policy Id PEXFLK0B-7H990 Plan Extended Warranty Device CROMA	79ZYDV3W5R7J8-24876125434 Status CANCELLED Registered By Swasthik	Registered On 2023-01-19		No Data Fo	und	G
VIEW CASE DETAILS						8

• Incase of performing a search via a non-registered phone number or email address, the system will not return any results and show a message 'No Data Found'.

< ATION MAINTENANCE REPAIR	VAS >					
← PHONE → Q 8106717314	Search					
ß						
No Data Found						
Figure: Phone search with no results	Figure: Phone search with no results					

4. Policy ID Search

Input any of the mentioned specifics (*Policy Id*) and click on the "Search" button to initiate the search.

POLICY	Phone	PEXFLK0B298812842226034	Search
	Email		
	Policy Id		
	Claim Id		

- <u>Policy Id</u>: While performing a policy search, agents should first select the Policy Id option from the search types, input the policy id and then click on the 'Search' button to get the policy details.
- The search result will display the policy associated with the policy id searched by the user. Agents can see the high-level information related to the Policy (*like policy ID, Type, Product, Brand etc.*) along with any Claims tagged to the policy
 - Agents can click on the 'View Policy' button to see the detailed view of policy
 - Similarly, agent can click on the accordion (*down arrow*) next to the Claim status to see an expanded view of Claim detail along with the link to access SRMS ticket details (*if available*)
 - Additionally, agents can view the customer information on the right side of screen under the <u>Customer Details</u> section and any past tickets associated with the searched policy id in the <u>Past Tickets</u> section

< ATION MAINTEN	IANCE REPAIR	VAS >	□ More Info 🛛 🗈 💿 🗊 🖬 🗄
	EXFLK0B298812842226034	Search	Customer Details
Policy ID PEXFLK0B298812842 Policy Status ACTIVE Brand MARQ Plan Name Extended Warran	2226034 Type VAS Start Date 2023-11-12 ty	VIEW POLICY Product AC End Date 2026-11-11	Name Anagha Mobile No 996****** Email ana***********************************
Claims			Search tickets Q = 1-3 of 3 < 0 >
CLAFLK356599934502544			Delay in service - Out of SPD_VAS/PL PEXFLK0B298812842226034 O Flipkart Jeeves U U U U
Policy Id PEXFLK0B298812	Status CANCELLED	Registered On 2024-03-06	W N/A (P /15245050275
Device MARQ VIEW CASE DETAILS	Registered By Anagha		Claim Registration PEXFLK0B298812842226034 ⊙ Flipkart Jeeves N/A ∅ 711449993056 ∑ Solved Complete

- - In case the policy id searched by agent is not present in the system or incase of any systemic issues, then the application will not return any results and show a message 'No Data Found'.



5. Claim ID Search

Input any of the mentioned specifics (*Claim Id*) and select the "**Search**" button to initiate the search.

<	INSTAL	LATION	MAINTENANCE	REPAIR	VAS	>
÷	CLAIM	Phone Email	CLAFLK105728267169164		Sea	irch
		Policy Id Claim Id	~	`		

• Claim Id: While performing a **claim** search, agents should first select the Claim Id option from the search types, input the claim id and then click on the 'Search' button to get the claim details.

- The search result will display the claim associated with the searched claim id. Agents can see the high-level information related to the Claim (*like claim ID, Status, Plan, Device etc.*) along with the 'View Claim' option.
 - Agents can click on the 'View Claim' button to see the detailed view of Claim
 - Additionally, agents can view the customer information on the right side of screen under the <u>Customer Details</u> section and any past tickets associated with the searched Claim id in the <u>Past Tickets</u> section

< ATION MAINTENANCE REPAIR VAS	> □ More Info ②
← CLAIM ID → Q CLAFLK111225871415421	Search Customer Details
	Name Anagha /IEW CLAIM Mobile No ******007 Email ************************************
Claim Id CLAFLK111225871415421 Status INITIATED_CANCELLATIONPlan Extended Warranty Device ELECTROLUX Registered On 2024-03-06T09:12:10 Expected Closing Date 2024-03-16	MAddress ajddyqiuehue, undefined, (AIPUR,
	Search tickets Q = 1-7 of 7 < 0 >
	■ Delay in Replacement CLAFLK111225871415421 ✓ Low
	□ Claim Registration CLAFLK111225871415421 □ Low N N/A [©] 12829594045 SO Solved Comple ^A

 In case the claim id searched by agent is not present in the system or incase of any systemic issues, then the application will not return any results and show a message 'No Data Found'.



6. Policy Detailed View

Policy Detailed View provides users with detailed information related to the Policy purchased by the customer.

Agents can navigate to Policy Detailed view via one of the below options.

1. Clicking on the '**View Policy**' button within the Policy listing section which will be available after performing search via Policy ID, Phone or Email id.

< ATION MAINTENA	NCE REPAIR	VAS >
	XFLK0B062922187323340	Search
Policy ID PEXFLK0B0629221873	23340	VIEW POLICY
Policy Status	Type VAS	Product AC
Brand CROMA	Start Date 2023-02-16	End Date 2026-02-15
Plan Name Extended Warranty		

2. Clicking on the '**Policy**' button within the Claim detailed view screen of a particular claim

ATION MAINTENANCE	REPAIR VAS	>	🕞 More Info 🛛 🔋 🔞 💿 🗊 🗄
CLAIM ID V Q CLAFLK-6PIOLKOU	110TWSOTECT-46009805018 s	earch ×	Ticket Action TAG INCIDENT
aims	POLICY VIEW CASE DETAILS	•	CLAIM
			Additional Ticket Detail
Claim View		•	Past Tickets II Sub Tickets
Plan Complete_Protection_WASHING MACHINES	Policy Id PCMFLK0V-EVMBNQQPSTNJ2H48JF- 05182278286		Search tickets Q = 0-0 of 0 < 0 >
Claim Status cancelled	Claim Id CLAFLK-6PI0LK0U1OTWSOTECT-4600980501	в	
Claim Registered By Muskan Muskan	Claim Registered On 2024-02-03T17:44:10		\$
Service Partner SRMS	Service Partner Request Id FLRW-ECYR2O-BC1CNM-BIJ8IV-8YQK90S		No Data Found



Let's now investigate the various views accessible in the Policy Details screen.

	_			£10
< ATION MAINTENANCE	REPAIR	VAS >	🕞 More Info 🛛 🖗	<u>o</u> 🖻 :
	3357702491636384	Search ×	Ticket Action TAG INCIDENT	
Policy Details		* Ø	POLICY	
			INITIATE CLAIM	UPDATE POLICY
Customer Details			RESEND POLICY DOCUMENT Past Tickets Sub Tickets	
Customer Name Anagha	Mobile 974******		Search tickets	2 0-0 of 0 < 0 >
Email ana***********************	Alternative No 996******			
Pincode 100000	State Rajasthan			۲ ۲
City JAIPUR	Address sfqt3qt32y23y			No Data Found
				6

 On the <u>left side of the Policy Details view</u>, agents can view details of policy with information such as *customer details*, *policy view*, *device details*, *policy update log*, *past claim history*, *construct details* etc. depending upon what information is available for the policy.

Policy Details	^
Customer Details	×
Policy View	-
Device Details	-
Policy Update Log	*
Past Claim History	•
Construct Details	*
Activity Logs	-
Figure: Policy Details	

PS: Incase, any of the section is not applicable for the policy then that section will not be displayed here for the policy.

<u>Customer details</u>: This section contains customer details like name, mobile number, email address, pin code, state, city, and address.

Customer Details 🗲	
Customer Name	Mobile
Dummy_123	*******314
Email	Pincode
*********************************	560037
State	City
Karnataka	BANGALORE
Address E702 RV (Customer City:BENGALURU)	
Figure: Customer Details	

Policy View: This section contains policy details like the *Policy Id, Policy Status, Plan Name, Policy Purchase Date, Purchased Source, Plan Price, Excess Amount, Validity, TAT (in Days)* and *Construct Title.*

Policy View <	
Policy Id	Policy Status
PEXJVS0V-6NXF5Y6LBD12I4U10C-74449901295	active
Plan Name	Policy Purchase Date
Extended Warranty	2022-01-31
Purchased Source	Plan Price
srms	800
Excess Amount Only If Available	Validity
N/A	2022-06-05 to 2024-06-05
TAT Days	Construct Title
30	Extended Warranty 2 Year
Figure: Policy View	

Device Details: This section contains device details like the *Device type, Brand, Model, MFG* Warranty Period (In Months), Purchase Date, Device Anchor Price, Device Selling Price, Serial No and Order Id.

Device Details	
Device	Brand
TELEVISIONS	BLAUPUNKT
Model	MFG Warranty Period In Months
32CSA7101	12 MONTH
Purchase Date	Device Anchor Price
2021-06-05	35965
Device Selling Price	Serial No
35965	04TMPPAR8010481123
Order Id UI_LOAD_TEST	
Figure: Device Details	

Policy Update Log: This section contains a record of all the actions, events, and interactions associated with the particular policy based on time with details such as *Updated Type, Old Value, New Value, Remarks, Updated By and Updated On* as shown in the screenshot below. Certain updates to Policy like customer details, device details etc. performed by agents from Kapture CRM will also get reflected here as a record.

Policy Update Log	€	-			*
Updated	Old Value	New Val	remarks	Updated	Updatec
ACTIVATED	N/A	N/A	Policy created	Godwit	2022-01
DEVICE_UPD	VIEW	VIEW	Testing seria	Ravi Roushan	2024-02
DEVICE_UPD	VIEW	VIEW	Testing	Ravi Roushan	2024-02-
Figure: P	olicy Up	date Log			

PS: The first action or event is listed at the top of the records list.

<u>Construct Details</u>: This section contains details of construct such as *Tenure In Months, Max Count Claims, Starting Date, and Spare Parts Category*.



Past Claim History: This section contains a record of all the **Claims** associated with the particular policy with information such as *Claim Id, Plan Name, Policy Id, Status, Registration Date, Registered By and Device.*

Past Claim History	←					
Claim Id	Plan Na	Policy Id	Status	Registra	Device	Registere
CLAFLK-10FQE0VZ	Complete Pr	PCMFLKOV-8	COMPLETED	2023-05-29	MOTOROLA	Jyotish Kumar
CLAFLK-DYH05UU!	Complete Pr	PCMFLK0V-8	COMPLETED	2023-10-09	MOTOROLA	Jyotish Kumar
CLAFLK-3Z0RAKU6	Complete Pr	PCMFLKOV-8	COMPLETED	2023-11-10	MOTOROLA	Jyotish Kumar
CLAFLK-7KN2ABO)	Complete Pr	PCMFLK0V-8	COMPLETED	2023-12-23	MOTOROLA	Jyotish Kumar
CLAFLK290605685	Complete Pr	PCMFLKOV-8	COMPLETED	2024-02-20	MOTOROLA	Jyotish Kumar
CLAFLK631262253	Complete Pr	PCMFLK0V-8	IN_PROGRESS	2024-03-11	MOTOROLA	Jyotish Kumar

Activity Logs: This section contains a record of all the activities associated with the particular policy with information such as *Status, Purpose, Remarks, Updated By, Updated On and Reason.*

Status	Purpose	Remarks	Updated On	Updated By	Reason
YC_SUCCESS	CLAIM	Claim Initiation	2023-12-23	Hitesh Nama	Claim Initiation
(YC_SUCCESS	CLAIM	Claim Initiation	2024-02-20	Shubham Gupta	Claim Initiation
VC_SUCCESS	CLAIM	Claim Initiation	2024-03-11	Yogita Keshwani	Claim Initiatio

• On the <u>right side of the Policy details view</u>, the agent will be able to access the available actions associated with the Policy, Kapture Ticket as well as the Past tickets associated with the policy.

Ticket Action TAG INCIDENT POLICY INITIATE CLAIM UPDATE POLICY RESEND POLICY DOCUMENT B Past Tickets B Sub Tickets Search tickets Q $=$ 1-2 of 2 < 0	
POLICY INITIATE CLAIM UPDATE POLICY RESEND POLICY DOCUMENT Past Tickets Search tickets Q T-2 of 2 0	
INITIATE CLAIM UPDATE POLICY RESEND POLICY DOCUMENT Image: state st	
RESEND POLICY DOCUMENT Past Tickets Sub Tickets Search tickets Q Total of 2 0	
Past Tickets Sub Tickets Search tickets Q T-2 of 2 0	
Search tickets Q = 1-2 of 2 < 0	
	>
■ Request to reschedule PCMFLK0B161478192969120 •• Flipkart Jeeves N N/A \$• 712125682227 So Solved Completer	4

> Policy Actions

The Policy related actions include **"Initiate Claim"**, **"Update Policy"**, and **"Resend Policy Document"**.

Note: The actions buttons available under this section are dynamic in nature and are dependent on the Policy status. Agents can perform these actions only if they are applicable for the policy while this section will be blank if none of the actions are applicable for the policy.



Please note that before Initiating a Claim agent can/need to use Update Policy action button (*as required*) to update any relevant information related to the customer or the device.

<u>Resend Policy Document</u>

Agents have the capability to resend policy documents to the customer when requested by the customer. Upon clicking the "Resend Policy Document" button, a notification will prompt asking for confirmation to resend the document and on selecting 'Yes', the policy document will be sent to the registered email id of the customer.



Update Policy

This policy action enables the agent to update the existing policy or customer details (KYC) before initiating a new claim for the customer associated with the policy ID.

On click of '<u>Update Policy</u>' button, a new pop-up opens up for agents to update the policy details.

,	
olicy Details	
folicy Name	Policy ID
Complete Protection	PCMFLK0B161478192969120
falidity	Device
2022-12-29 to 2025-12-28	WASHING MACHINES
pdate Customer Details	EDIT
ame	Email ID
Anagha	anaghsashok@gmaiLcom
labile Number	Alternate Number
9964581007	9964581007
ddress	Pincode
	100000
ate	City
Rajasthan	JAIPUR
suntry	
INDIA	
pdate Device Details	EDIT
eviceSerialNo/IMEI	Upload IMEI Document
12345	Choose File No file chosen
	UPLOAD DOCUMENT
odate Remarks	
emarks	
Enter the remark	

Agents can update the **KYC** for customers in the <u>Update Customer Details</u> section.

Step 1: Click on the **Edit** button to start modifying/updating the KYC details

Step 2: Update the relevant KYC details.

<u>Note</u>: Agents can update any customer details except the *'Name'* field. Also, updating/changing the Pin Code will automatically populate the City and State associated with the pin code.

Step 3: Agents need to provide the remarks in the Update Remarks section

Step 4: Click on the 'Submit' button to complete the section

Name Email ID Anagha anaghsashok@gmail.com Mobile Number Aternate Number 9964581007 9964581007 Adress Pincode sfwgweretretr 100000 State City Rajasthan JAIPUR Country INDIA INDIA EDIT DeviceSerialNo/IMEI Upload IMEI Document 12345 Choose File_No file chosen Uplate Remarks Enter the remark	Update Customer Details	EDIT
Anagha anaghtashok@gmail.com Mobile Number 9964581007 9964581007 9964581007 Adress Pincode sfwgweretretr 100000 State City Rajasthan JAIPUR Country INDIA INDIA EDIT DeviceSerialNo/IMEI Upload IMEI Document 12345 Choose File No file chosen Update Remarks Remarks Enter the remark SUBMIT	Name	Email ID
Mobile Number Alternate Number 9964581007 9964581007 Address Pincode sfwgweretretr 100000 State City Rajasthan JAIPUR Country INDIA Update Device Details Upload IMEI Document 12345 Choose File No file chosen UPLOAD DOCUMENT	Anagha	anaghsashok@gmail.com
9964581007 9964581007 Address Pincode Isfwgweretretr 100000 State City Rajasthan JAIPUR Country INDIA Update Device Details EDIT DeviceSerialNor/IMEI Upload IMEI Document 12345 Choose File No file chosen Update Remarks Enter the remark	Mobile Number	Alternate Number
Address Pincode sfwgweretretr fwgweretretr fue state City Rajasthan [JAIPUR Country INDIA Update Device Details Upload IMEI Document 12345 UploAD DOCUMENT UploAD DOCUMENT UploAL III SUBMIT SUBMIT	9964581007	9964581007
sfwgweretretr stype state city Rajasthan JAIPUR Country INDIA Update Device Details Upload IMEI Document 12345 UploAD DOCUMENT UploAD DOCUMENT SUBMIT SUBMIT	Address	Pincode
State City Rajasthan JAIPUR Country INDIA INDIA INDIA Update Device Details EDIT DeviceSerialNo/IMEI Upload IMEI Document 12345 Choose File No file chosen UPLOAD DOCUMENT Update Remarks Remarks Enter the remark	sfwgweretretr	100000
Rajasthan JAIPUR Country INDIA INDIA Update Device Details DeviceSerialNo/IMEI Upload IMEI Document 12345 Choose File No file chosen UPLOAD DOCUMENT Upload Remarks Remarks Enter the remark Enter the remark SUBMIT	State	City
Country INDIA Update Device Details Upload IMEI Document 12345 UPLOAD DOCUMENT UPLOAD DOCUMENT UPLOAD DOCUMENT Enter the remarks Enter the remark SUBMIT	Rajasthan	JAIPUR
INDIA Update Device Details DeviceSerialNo/IMEI Upload IMEI Document UPLOAD DOCUMENT UploAD DOCUMENT Update Remarks Remarks Enter the remark SUBMIT	Country	
Update Device Details EDIT DeviceSerialNo/IMEI Upload IMEI Document UPLOAD DOCUMENT Update Remarks Remarks Enter the remark SUBMIT	INDIA	
Update Device Details Upload IMEI Document U2345 UPLOAD DOCUMENT Update Remarks Remarks Enter the remark SUBMIT		
DeviceSerialNo/IMEI Upload IMEI Document 12345 Choose File No file chosen UPLOAD DOCUMENT Update Remarks Remarks Enter the remark SUBMIT	Update Device Details	EDIT
12345 Choose File No file chosen UPLOAD DOCUMENT Update Remarks Remarks Enter the remark SUBMIT	DeviceSerialNo/IMEI	Upload IMEI Document
UPLOAD DOCUMENT Update Remarks Enter the remark SUBMIT	12345	Choose File No file chosen
Update Remarks Remarks Enter the remark SUBMIT		UPLOAD DOCUMENT
Update Remarks Remarks Enter the remark SUBMIT		
Remarks Enter the remark SUBMIT	Update Remarks	
Enter the remark SUBMIT	Remarks	
SUBMIT	Enter the remark	
SUBMIT		
		SUBMIT

Agents can use the <u>Update Device Details</u> section to upload the **Replacement certificate**.

Step 1: Upon clicking the **Edit** button, the fields under device details will be enabled for update

Step 2: Select the new replacement document from the agent's computer system by clicking on 'Choose File'

Step 3: Update the serial number in the 'Device Serial Number' field

Step 4: Click on 'Upload Document' to upload the new replacement document

Step 5: Provide the remarks for this device details update under 'Remarks' field

Step 6: Click on the 'Submit' button to complete the process

Update Device Details	EDIT
DeviceSerialNo/IMEI	Upload IMEI Document
12345	Choose File No file chosen
	UPLOAD DOCUMENT
Update Remarks	
Remarks	
Enter the remark	
·	SUBMIT

After completing the Policy update action, the pop-up closes and the user will be in the Policy detailed view screen.

< ATION MAINTENANCE	REPAIR	VAS	>	🕞 More Info 🛛 💈	ē :	
	EVMBNQQPSTNJ2H48JF-05	182278286 S	Search X	Ticket Action TAG INCIDENT		
Policy Details		9	*	POLICY	UPDATE POLICY	
Customer Details			•	RESEND POLICY DOCUMENT		
Customer Name T Suribabu	Mobile 988******			Search tickets Q		< 0 >
Email _{tsr} **********	Alternative No 986******					
Pincode 530013	State Andhra Pradesh					6
City VISHAKHAPATNAM	Address anand residencyfirst fl sastri layout seechama 	oor flat no. 102 balayya adhara Visakhapatnam	a		6	•
					No tickets.	6

Additionally, agents can verify if the latest KYC information and replacement certificate is updated with the Policy by navigating to the **Policy Update Log section** on the left side of Policy Details screen.

icy Details					©
Customer Details					•
Policy View					¥
Device Details					•
Policy Update Log					
olicy Update Log Update	Old Value	New Val	remarks	Update	Update
Volicy Update Log Update ACTIVATED	Old Value	New Val N/A	remarks Policy created	Update radha c	Update 2024-03-04
Policy Update Log Update ACTIVATED CUSTOMER	Old Value N/A VIEW	New Val N/A VIEW	remarks Policy created customer de	Update radha c squire	Update 2024-03-04 2024-03-26
Volicy Update Log Update ACTIVATED CUSTOMER CUSTOMER	Old Value N/A VIEW	New Val N/A VIEW VIEW	remarks Policy created customer de replacement	Update radha c squire squire	Update 2024-03-04 2024-03-26 2024-03-26

Initiate Claim

This policy action enables the agent to create a new claim for the customer associated with the particular policy ID. On click of 'Initiate Claim' button, a new pop-up opens up for agents to start the KYI process.

Initiate Claim		×
1 What happened to the device?		
BACK	NEXT	
Figure: Initiate Claim		

Step 1: Provide response for the KYI questions displayed on screen one after the other based on the customer inputs

Step 2: Continue with the questionnaire until a summary screen appears. Incase, agent needs to go back and review/change the answer for any of the question(s) during this process, use the **Back** button or Click on the particular **question**

Initiate Claim	×
What happened to the device? → Manufacturing Defect	
Select Claim Reason → Extended Warranty	
Has the issue come up as result of recent Installation, removal, dismantling, moving or transfer? → NO	
4 Symptom Description	
er BACK NEXT	

Step 3: A summary screen appears upon completing the questions, agent needs to review the answers provided for the KYI questions

Step 4: Click on the 'Edit' button to go back and modify answers *if needed*. Please note that upon clicking Edit, the KYI questionnaire will be available to modify and on competing changes, the summary screen appears again

Step 5: Click on the 'Submit' button to complete the claim registration process

Preview Initiate Claim	×
All steps are completed and here is preview of your response	
What happened to the device?	
Manufacturing Defect	
Select Claim Reason	
Extended Warranty	
Has the issue come up as result of recent Installation, removal, dismantling, moving or transfer?	
NO	
Symptom Description	
test	
What issue are you facing with device?	
Cooling Issue	
Claim Settlement Option	
Repair	
Repair Mode	
On-site	
When did it happen?	
2024-04-17	
Accept/Reject Claim	
Accept	
EDIT	МІТ

After completing the Initiate claim action, user will be redirected to the Claim Detailed view screen of the new claim which got created.

IANCE REPAIR	VAS	PRIVATE LABEL	🕞 More Info 🛛 🖗	D
CLAIM ID V Q CLAFLK	101034495465801	Search	CLAIM	
Claims	VI POLICY VI		CANCEL CLAIM	TERMINAL ACTION
Claim View		*	Additional Ticket Detail Bast Tickets Sub Tickets	•
Plan Extended_Warranty_AC	Policy Id PEXFLK0B34381742762	9590	Search tickets	૨ 0-0 of 0 < 0 >
Claim Status	Claim ld CLAFLK1010344954658	01		
Claim Registered By radha c	Claim Registered On 2024-03-05T13:14:43			ð
Service Partner SRMS	Service Partner Reque FLRC-98ASLH-2Y7BHD-L	est Id LP5D0I-LQ1XGF0		No Data Found
Task Type	Task Status			

7. <u>Claim Detailed View</u>

Claim Detailed View provides users with detailed information related to the claim associated with the policy purchased by the customer.

Agents can navigate to Claim Detailed view via one of the below options:

1. Clicking on the '**View Claim**' button within the claim listing section which will be available after performing search via Claim ID, Phone or Email id.



2. Clicking on the **Claim ID** within the policy listing section which will be available after performing search via Policy ID, Phone or Email id. This option will be available only when a claim is present for the searched policy.

	XFLK0B062922187323340	Search
Policy ID PEXFLK0B0629221873	23340	
Policy Status CLAIM_IN_PROGRESS	Type VAS	Product AC
Brand CROMA	Start Date 2023-02-16	End Date 2026-02-15
Plan Name Extended Warranty		
Claims		
CLAFLK765202959226942		IN_PROGRESS
Policy Id PEXFLK0B06292218	7323340	
Plan Extended Warranty	Status IN_PROGRESS	Registered On 2024-03-05
Device CROMA	Registered By Anagha	
VIEW CASE DETAILS		

3. Clicking on the **Claim ID** within the Past Claim History section of the policy detailed view. This option will be available only when a claim is present for the particular policy for which a detailed view is accessed.

Dilcy Details Customer Details Policy View Policy View Policy Update Log Policy Update Log Past Claim History Claim Id Plan Na Policy Id Status Registra Devia CLAFLK765202959 Extended W PEXFLK0B06 IN_PROGRESS 2024-03-05 CROM		PEXFLK0B062922	2187323340			Sear
Device Details Policy View Policy View Policy Update Log Past Claim History Claim Id Plan Na Policy Id Status Registra Device Details CLAFLK765202959 Extended W PEXFLK0B06 IN_PROGRESS 2024-03-05						
Customer Details Policy View Policy Details Policy Update Log Policy Update Log Past Claim History Claim Id Plan Na Policy Id Status Registra Device CLAFLK765202959 Extended W PEXFLK0B06 IN_PROGRESS 2024-03-05 CROM	olicy Details					0
Customer Details • Policy View • Device Details • Policy Update Log • Past Claim History • Claim Id Plan Na Policy Id Status Registra Device CLAFLK765202959 Extended W PEXFLK0B06 IN_PROGRESS 2024-03-05 CROM						
Policy View • Device Details • Policy Update Log • Past Claim History • Claim Id Plan Na Policy Id Status Registra Device CLAFLK765202959 Extended W Extended W PEXFLK0B06	Customer Details					*
Device Details Policy Update Log Past Claim History Past Claim History Claim Id Plan Na Policy Id Status Registra Devid CLAFLK765202959 Extended W PEXFLK0B06 IN_PROGRESS 2024-03-05 CROM 	Policy View					•
Policy Update Log Past Claim History Claim Id Plan Na Policy Id Status Registra Devia CLAFLK765202959 Extended W PEXFLK0B06 IN_PROGRESS 2024-03-05 CROM 	Device Details					•
Past Claim History Policy Id Status Registra Devia CLAFLK765202959 Extended W PEXFLK0B06 IN_PROGRESS 2024-03-05 CROM	Policy Update Log					*
Claim Id Plan Na Policy Id Status Registra Device CLAFLK765202959 Extended W PEXFLK0B06 IN_PROGRESS 2024-03-05 CROM	Past Claim History]				
CLAFLK765202959 Extended W PEXFLK0B06 IN_PROGRESS 2024-03-05 CROM	Claim Id	Plan Na	Policy Id	Status	Registra	Devie
	CLAFLK765202959	Extended W	PEXFLK0B06	IN_PROGRESS	2024-03-05	CRON



- Let's now investigate the various views accessible in the Claim Details screen.
 - On the <u>left side of the Claim Details view</u>, agents can view details of policy with information such as *customer details, policy view, device details, policy update log construct details etc.* depending upon what information is available for the claim.
 - Agents can use the 'Policy' button for navigating to the Policy Details page and 'View Case Details' button to access SRMS details.

Claims	POLICY VIEW CASE DETAILS	^
Claim View		•
Policy Details		•
Claim KYI Details		•
Estimate Details Figure: Claims Details	,	•

PS: Incase, any of the sections is not applicable for the claim then that section will not be displayed here for the claim.

<u>Claim View</u>: This section contains claim details like the Plan name, Claim Id, Claim Status, Plan Name, Claim Registered Date, Claim Registered By, Service Partner, Service Partner Id, Task Type, Task Status and TAT (in Days).

Plan	Policy Id
Extended_Warranty_AC	PEXFLK0B257110710649051
Claim Status	Claim Id
initiated_cancellation	CLAFLK111225871415421
Claim Registered By	Claim Registered On
radha c	2024-03-06T09:12:10
Service Partner	Service Partner Request Id
SRMS	FLRE-C0VLCX-DVD1J0-MWBW7O-EY4NH
Task Type	Task Status
REPLACEMENT	CANCELLATION_REJECTED
TAT	
N/A	

PS: TAT is displayed from the application side based on the applicable turnaround time for the claim depending upon the claim status, task type and task status.

<u>Customer details</u>: This section contains customer details like name, mobile number, email address, pin code, state, city, and address.

Customer Details <	
Customer Name Dummy 123	Mobile *******314
Email ************************************	Pincode 560037
State Karnataka	City BANGALORE
Address E702 RV (Customer City:BENGALURU)	
Figure: Customer Details	

<u>Claim KYI</u>: This section contains the KYI details provided by the customer while submitting the claim.

kapture

Claim KYI Details	
Claim KYI Details	
Question	Answers
What happened to the device?	Manufacturing Defect
Has the issue come up as result of recent Installatio	NO
Select Claim Reason	Extended Warranty
Accept/Reject Claim	Accept
Symptom Description	Test
Claim Settlement Option	Repair
Repair Mode	On-site
What issue are you facing with device?	No Power (No LED on Power Button)
When did it happen?	2024-03-14
When did it happen?	2024-03-14

Figure: Claim KYI Details

Estimate Details: This section contains the estimation details in case of any excess payment to be done by customer with details such as *Payment Mode, Outcome, Service and Excess Charges, Amount to be Collected, RSA Consumed, Total cost of Covered and Non-Covered parts.* This section will be available in the claim details view only if the customer needs to do excess payment for the claim.

Estimate Details		
Payment Mode COD	Outcome REPAIR	
Service Charge 0	Excess Charge 0	
Amount To Be Collected	Rsa Consumed 0	
Total Cost Of Covered Part 2669.3	Total Cost Of Non Covered Part 0	
TOTAL COST OF COVERED PARTS TOTAL COST OF NON COVERED PARTS		
Figure: Estimate Details		

<u>UCP Process Refund Action</u>: This section contains the details of Refund in case the claim is eligible for Refund with details like *Approved Amount, Pickup status, Remarks and Payment Date*.

This section will be available in the claim details view only if the customer is eligible for refund for the claim.

UCP Process Refund Action		
Approved Amount	Pickup Status Yes	
Remarks	Payment Date	
Test	30-03-2024, 12:30:20	

<u>Claim Activity Logs</u>: This section contains a record of all the activities associated with the particular claim with information such as *Status, Purpose, Remarks, Updated By, Updated On and Reason.*

laim Activity Lo	ogs		
Task	Status	Updated By	Updated On
CLAIM	CREATED	radha c	2024-03-18T15:48:47
KYC	COMPLETED	radha c	2024-03-18T15:48:47
CLAIM	IN_PROGRESS	radha c	2024-03-18T15:48:47
KYI	CREATED	SYSTEM	2024-03-18T15:48:48
KYI	COMPLETED	radha c	2024-03-18T15:48:48
REPAIR	CREATED	SYSTEM	2024-03-18T15:49:13
REPAIR	ALLOCATED	SYSTEM	2024-03-18T15:50:29
REPAIR	IN_PROGRESS	SYSTEM	2024-03-18T15:51:18
REPAIR	RESCHEDULED	SYSTEM	2024-03-18T15:51:31
REPAIR	TERMINAL_ACTION_REQ	squire	2024-03-18T18:29:35
REPAIR	INITIATED_CANCELLATI	squire	2024-03-18T18:29:35

Figure: Claim Activity Logs

PS: The latest action or event is listed at the bottom of the records.

• On the right side of the claim detailed view, the agent will be able to access the available actions associated with the Claim, Kapture Ticket as well as the Past tickets associated with the claim.

🖙 More Info 🛛 🔋 🔞	:
Ticket Action TAG INCIDENT	
CLAIM REPLACEMENT KPO REJECT REPLACEMENT	
Past Tickets Image: Sub Tickets Search tickets Q	1-5 of 5 < 0 >
 Delay in Defective pickup CLAFLK167684066351030 N/A ¹ 712140449736 	Cow SO Solved Comr
 Delay in refund CLAFLK167684066351030 N/A ¹/₄ 712140141178 	C Low

> Claim Actions

The Claim related actions include **'Cancel Claim'**, **'Terminal Action'**, **'Cancel Refund'**, **'Cancel Replacement'**, **'KPO Reject Replacement'**

Note: The actions buttons available under this section are dynamic in nature and are dependent on the Claim status. Agents can perform these actions only if they are applicable for the claim while this section will be blank if none of the actions are applicable for the claim.

• Cancel Claim

This claim action enables the agent to cancel any claim that is currently 'In progress'. Upon clicking the "Cancel Claim" button a notification will prompt asking for confirmation to cancel the claim and on selecting 'Yes', the claim will be cancelled.

CP More Info 🛛 🗈 💿	• • :	Cancel Claim	×
Ticket Action TAG INCIDENT		Are you sure want to cancel claim?	
CLAIM		YES NO	
CANCEL CLAIM	TERMINAL ACTION	Figure: Cancel Claim	

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CLAIM ID V Q CLAFLK-6PIOLKOU	10TWSOTECT-46009805018 Search	Ticket Action TAG INCIDENT
aims	POLICY VIEW CASE DETAILS	CLAIM
		Additional Ticket Detail
Claim View	*	Past Tickets Is Sub Tickets
Plan Complete_Protection_WASHING MACHINES	Policy Id PCMFLK0V-EVMBNQQPSTNJ2H48JF- 05182278286	Search tickets Q = 0-0 of 0 < 0 >
Claim Status cancelled	Claim ld CLAFLK-6PI0LK0U1OTWSOTECT-46009805018	
Claim Registered By Muskan Muskan	Claim Registered On 2024-02-03T17:44:10	8
Service Partner SRMS	Service Partner Request Id FLRW-ECYR2O-BC1CNM-BIJ8IV-8YQK90S	No Data Found

• <u>Terminal Action</u>

This functionality enables the agents to execute Terminal action from the application based on the claim status. Upon clicking the "**Terminal Action**" button, a pop-up appears on the screen and agents need to provide the necessary information requested and click on the '**Submit**' button.

		Terminal Action X
		Select terminal action
🗘 More Info 🛛 🗈 💿	• •	Select out calling status
Ticket Action		Remarks
TAG INCIDENT		Enter remarks
CLAIM		SUBMIT
CANCEL CLAIM	TERMINAL ACTION	Figure: Terminal Action

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	110TWSOTECT-46009805018 Searc	Ticket Action
aims	VIEW CASE DETAILS	CLAIM
		Additional Ticket Detail
Claim View	*	Image: Past Tickets Image: Sub Tickets
Plan Complete_Protection_WASHING MACHINES	Policy Id PCMFLK0V-EVMBNQQPSTNJ2H48JF- 05182278286	Search tickets Q = 0-0 of 0 < 0 >
Claim Status cancelled	Claim ld CLAFLK-6PI0LK0U1OTWSOTECT-46009805018	
Claim Registered By Muskan Muskan	Claim Registered On 2024-02-03T17:44:10	\$
Service Partner SRMS	Service Partner Request Id FLRW-ECYR2O-BC1CNM-BIJ8IV-8YQK90S	No Data Found

• KPO Reject Repair

This option enables the agents to take KPO Reject Repair action from the application based on the claim status. Upon clicking the "KPO Reject Repair" button, a pop-up appears on the screen and agents need to provide the necessary information requested and click on the 'Submit' button.

KPO Reject Repair	×
Select KPO Reject Outcomes	
	· •
Remarks	
Enter remarks	
SUBMIT	
gure: KPO Reject Repair	

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CLAIM ID V Q CLAFLK-6PIOLKOU	J10TWSOTECT-46009805018 Search	Ticket Action TAG INCIDENT
aims	VIEW CASE DETAILS	CLAIM
		Additional Ticket Detail
Claim View	*	Past Tickets Is Sub Tickets
Plan Complete_Protection_WASHING MACHINES	Policy Id PCMFLK0V-EVMBNQQPSTNJ2H48JF- 05182278286	Search tickets Q = 0-0 of 0 < 0 >
Claim Status cancelled	Claim ld CLAFLK-6PI0LK0U1OTWSOTECT-46009805018	
Claim Registered By Muskan Muskan	Claim Registered On 2024-02-03T17:44:10	Ø
Service Partner SRMS	Service Partner Request Id FLRW-ECYR2O-BC1CNM-BIJ8IV-8YQK90S	No Data Found

• KPO Reject Refund

This functionality enables the agents to take KPO Reject Refund action from the application based on the claim status. Upon clicking the "KPO Reject Refund" button, a pop-up appears on the screen and agents need to provide the necessary information requested and click on the 'Submit' button.

🖙 More Info 🛛 😧 🔞 🖬 🗄	KPO Reject Refund X
	Select KPO Reject Outcomes
CLAIM	· •
	Remarks
REFUND	Enter remarks
KPO REJECT REFUND	SUBMIT

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ATION MAINTENANCE	REPAIR VAS	> 🖓 More Info 📿 🖹 🧿 📴 🗄
CLAIM ID V Q CLAFLK-6PIOLKOU	10TWSOTECT-46009805018 Searc	h Ticket Action
ims	POLICY VIEW CASE DETAILS	
		Additional Ticket Detail
laim View	*	Past Tickets Sub Tickets
Plan Complete_Protection_WASHING MACHINES	Policy Id PCMFLK0V-EVMBNQQPSTNJ2H48JF- 05182278286	Search tickets Q = 0-0 of 0 < 0 >
Claim Status cancelled	Claim ld CLAFLK-6PI0LK0U1OTWSOTECT-46009805018	
C laim Registered By Muskan Muskan	Claim Registered On 2024-02-03T17:44:10	8
Service Partner SRMS	Service Partner Request Id FLRW-ECYR2O-BC1CNM-BIJ8IV-8YQK90S	No Data Found

• KPO Reject Replacement

This option enables the agents to take KPO Reject Replacement action from the application based on the claim status. Upon clicking the "KPO Reject Replacement" button, a pop-up appears on the screen and agents need to provide the necessary information requested and click on the 'Submit' button.

🖙 More Info 🛛 🔇 🔞 🖬 🕄	KPO Reject Replacement X
	Select KPO Reject Outcomes
CLAIM	
CANCEL CLAIM	Remarks
REPLACEMENT	Enter remarks
KPO REJECT REPLACEMENT	SUBMIT

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TION MAINTENANCE	REPAIR VAS	>	 CP More Info 🛛 🖹 🚫 📑 🗊 :
CLAIM ID V Q CLAFLK-6PIOLKOU	J10TWSOTECT-46009805018	Search ×	Ticket Action TAG INCIDENT
aims	POLICY VIEW CASE DETAILS	-	CLAIM
			Additional Ticket Detail
Claim View		1	Past Tickets Sub Tickets
Plan Complete_Protection_WASHING MACHINES	Policy Id PCMFLKOV-EVMBNQQPSTNJ2H48JF- 05182278286	I	Search tickets Q = 0-0 of 0 < 0 >
Claim Status cancelled	Claim Id CLAFLK-6PI0LK0U1OTWSOTECT-460098050	18	
Claim Registered By Muskan Muskan	Claim Registered On 2024-02-03T17:44:10		Å (
Service Partner SRMS	Service Partner Request Id FLRW-ECYR2O-BC1 CNM-BIJ8IV-8YQK90S		No Data Found

• Cancel Replacement

This functionality enables the agents to take Cancel Replacement action from the application based on the claim status. Upon clicking the "Cancel Replacement" button, a pop-up appears on the screen and agents need to provide the necessary information requested and click on the 'Submit' button.

🖙 More Info 🛛 🔇	Cancel Replacement X
CLAIM	Remarks
CANCEL CLAIM	Enter remarks
REPLACEMENT	
CANCEL REPLACEMENT	SUBMIT

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ATION MAINTENANCE	REPAIR VAS	>	GP More Info 😢 🖺 🗿 🗊 🖬 :
	J1OTWSOTECT-46009805018	Search	Ticket Action TAG INCIDENT
aims	VIEW CASE DETA	ils 🔺	CLAIM
			Additional Ticket Detail
Claim View		•	Bast Tickets Sub Tickets
Plan Complete_Protection_WASHING MACHINES	Policy Id PCMFLK0V-EVMBNQQPSTNJ2H48JF- 05182278286	I	Search tickets Q = 0-0 of 0 < 0 >
Claim Status cancelled	Claim Id CLAFLK-6PI0LK0U1OTWSOTECT-460098/	05018	
Claim Registered By Muskan Muskan	Claim Registered On 2024-02-03T17:44:10		\$
Service Partner SRMS	Service Partner Request Id FLRW-ECYR2O-BC1CNM-BIJ8IV-8YQK90S		No Data Found

<u>Cancel Refund</u>

This claim action enables the agents to take Cancel Refund action from the application based on the claim status. Upon clicking the "Cancel Refund" button, a pop-up appears on the screen and agents need to provide the necessary information requested and click on the 'Submit' button.

C⊋ More Info	Cancel Refund X
CLAIM	Add Remarks
	Enter remarks
REFUND	
CANCEL REFUND	SUBMIT

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TION MAINTENANCE	REPAIR VAS	>	🕞 More Info 😢 🖺 🗿 📴 🗄
CLAIM ID V Q CLAFLK-6PIOLKOU	10TWSOTECT-46009805018 Sea	rch X	Ticket Action TAG INCIDENT
ims	POLICY VIEW CASE DETAILS	-	CLAIM
			Additional Ticket Detail
laim View	*		B Past Tickets Sub Tickets
Plan Complete_Protection_WASHING MACHINES	Policy Id PCMFLK0V-EVMBNQQPSTNJ2H48JF- 05182278286	I	Search tickets Q = 0-0 of 0 < 0 >
Claim Status ancelled	Claim ld CLAFLK-6PI0LK0U1OTWSOTECT-46009805018		
laim Registered By Iuskan Muskan	Claim Registered On 2024-02-03T17:44:10		\$
ervice Partner RMS	Service Partner Request Id FLRW-ECYR2O-BC1CNM-BIJ8IV-8YQK90S		No Data Found

8. SRMS Case Details

Agents can access the **SRMS** (*Service Request Management System*) case details via one of the options below:

 Clicking on the 'View Case Details' button within the claim details page of a claim. This button will be available within the claim details page only if the claim has a SRMS case ID.



2. Clicking on the '**View Case Details'** button within the policy listing section which will be available after performing search via Policy ID, Phone or Email id. This option will work only if a SRMS case id is present for the claim.

	EXFLK0B059196622991497	Search
		VIEW POLICY
Policy ID PEXFLK0B059196622	991497	
Policy Status ACTIVE	Type VAS	Product AC
Brand CROMA	Start Date 2024-01-10	End Date 2027-01-09
Plan Name Extended Warrant	у	
Claims		
	22004.407	
Policy la PEXFLK0B0591900	Status CANCELLED	D
Plan Extended Warranty	Status CANCELLED	Registered On 2024-03-06
VIEW CASE DETAILS	кеgistered Ыу Anagha	

SRMS case Details view provides users with detailed information related to the SRMS case ID associated with the claim registered by the customer. On clicking the button, a pop-up window will open with SRMS ticket details available for the case id.

SRMS Ticket Details		×	
SRMS Ticket Details	C	Ŧ	
SRMS Diagnostic		Ŧ	
Ticket Activity Summary		•	
Figure: View Case Details_SRMS			l

PS:Incase, any of the sections is not applicable for the case then that section will not be displayed here.

<u>SRMS Ticket Details</u>: This section contains information about the SRMS ticket for this case with details such as the *Case Id, SRMS Status, SRMS Sub Status, Customer Name, Compliant Type, Plan Name, Provider, Service Promised Date, Reschedule Visit Date, Technician Name, Creation Date etc.*

SRMS Ticket Details	
Case ID	Customer Name
FLRT-B483E1-TO8NPB-YIZJM6-HNE3GAL	Radha
Complaint Type	Status
Repair	Service Allocated
Sub Status	Provider
Without Parts	flipkart
SPD	Reschedule Visit Date
21-03-2024, 12 AM- 11 PM	Invalid date
Technician	Creation Date
DUMMY TECHNICIAN2 (5 * RATED)	19-03-2024, 05:28:19

SRMS Ticket Activity: This section contains a summary of the activities associated with the case ID with details such as *SRMS ticket Status, SRMS ticket, Updated By.* Each activity is shown as a row and agents can click on a particular row to see more details about the activity like *Request type, Status Update Time,* Remarks etc.

icket Status	Sub Status	Updated By
ATTRIBUTE_UPDATED	Not Applicable	UNIFIED_ALLOCATOR
Status	Sub Status	
ATTRIBUTE_UPDATED	Not Applicable	
Status Update Time	Update By	
2024-03-21 08:10:34	UNIFIED_ALLOCATOR	2
Request Type		
REPAIR		
Service Created	Not Applicable	flipkart

<u>SRMS Diagnostic</u>: This section contains the diagnostic information associated with the case including the Technician visit information.

SRMS Diagnostic								*
Plan Id PCOJVSOV-DEYBWION	NG0RNI410EG-742277583	392		Plan Name Complete Pr	otection Lite 3 year			
Visit Info								
Total A	Total Co	Service	Custom	Reason	Technici	Update	Sympto	Context
0	0	0	0	Manufacturi	SHEKHAR	2024-02-10T	VIEW	VIEW
0	0	0	0	Manufacturi	SHEKHAR	2024-02-10T	VIEW	VIEW
Figure: SRM	MS Diagnostic	Information						

Agents can access the <u>Context</u> for a particular visit by clicking on the **View** button on the specific row upon which a pop-up opens with the associated images.



Additionally, agents can also see the Symptoms for the particular visit by clicking on the **View** button under <u>Symptoms</u> while any associated images with respect to the parts can be viewed by clicking on the View button in that part row.

		Symptoms		
Issue	Sub Issue	Symptom cause	Action	Remarks
OPERATING_ISSUES	WASH_NOT_WORKING	MANUFACTURING_DEFECTS	REPAIR_WITH_SPARE_PARTS	Pending for main motor and belt
Image	Part Cost		Part Covered	
VIEW	1678		No	
VIEW	129		Yes	



<u>SRMS Sales</u>: This section contains the sales information associated with the case. Agents can click on the '**Resend Invoice**' button to resend the invoice to the customer upon request. Invoice will be sent to the customer's registered email address.

Sales							*
Sales Order ID ORF1DMKZNP1J1X7H4XVVEQ8M3CKZN0			Order Date 2023-01-31T17:5	0:35			
Technician ID S000122227			Technician Nan NA	ne			
Payment Mode NA			Total Amount 550				
Total Amount Payable 0			Status COMPLETED				
Item Details							
ltemName SalesType	Quantity	UnitOfMeasurment	BasePrice	TaxRate	Тах	TotalAmount	AmountRecieved
REPAIR SERVICE SERVICE	1	NOS	466.1	18	83.9	550	550

SRMS Part Demand: This section contains the Part demand details associated with the case.

MS Part Demand						
SRMS DOA pa	art					
ѕки	Parts Name	Part Code	Primary Issue	Secondary Issue	DOA Time	Images
gwhiwi4t3092	CLUTCH ASSY	WI4TLWMLLLK0P8	WRONG_PART	WRONG_CONFIGU	2024-03-15 11:26:29	VIEW
gwhiwi4t3092	CLUTCH ASSY	WI4TLWMLLLK0P8	WRONG_PART	WRONG_CONFIGU	2024-02-21 14:04:21	VIEW

Agents can click on the View button to see the images associated with the part.



How to Tag an Incident?

Tag Incident feature allows agents to create a ticket for any customer interaction. This option is available for agents for order related as well as non-order related customer interactions.

Below table provides an overview of the Incident Tagging scenarios.

Level	Incident Sub-folder Type	Disposition Type	Status
	Enquiry	Resolved	Disposed Promptly in the name of L1 agent
Policy	Request	Resolved	Disposed Promptly in the name of L1 agent
	Complaint	Unresolved	Assigned to L2 VAS Queue
	Enquiry	Resolved	Disposed Promptly in the name of L1 agent
	Request	Resolved	Disposed Promptly in the name of L1 agent
Claim	Complaint (Without SRMS case ID)	Unresolved	Assigned to L2 VAS Queue
	Complaint (<i>With SRMS case ID but no SRMS incident folder</i>)	Unresolved	Assigned to L2 VAS Queue
	Complaint (<i>With SRMS cas</i> e)	Unresolved	Moved to Pending Queue for 48 hou <mark>rs</mark>

- ★ If the agent tags the incident to the subfolders "Enquiry" and "Request," the tickets will be disposed of promptly whether it's done from Policy Level or Claim Level
- ★ If the agent tags the incident to the "Complaint" subfolder,
 - In case of Policy Level tagging, the ticket will remain "unresolved" and move to the 'L2
 VAS Queue' for L2 agent to action it.
 - In case of Claim Level tagging without a SRMS ticket, the ticket will remain "unresolved" and move to the 'L2 VAS Queue' for L2 agent to action it.
 - In case of Claim Level tagging with a SRMS ticket, the ticket will remain "unresolved" and move to the 'Pending Queue' for 48 hours from the time of ticket creation.
 Additionally, a new Incident will be generated in the Service Request Management System (SRMS), with the Ticket ID assigned as an alphanumeric value. It is to be noted that the due date for tickets mapped to the "complaint" folder is 48 hours from the time of ticket creation. In the event of tickets not getting resolved within the due date, the tickets in the "Pending Queue" will get assigned to the available L2 agents automatically.

<u>Note</u>: Should the tickets be **resolved within the Service Level Agreement (SLA)**, the corresponding tickets generated on the **Kapture portal** will reflect a **Resolved status**. The status gets refreshed and synced on the Kapture portal at **15-minute intervals**, **such as 11:00 AM**, **11:15 AM**, **11:30 AM**, **and so forth**.

• Order Related Incident Tagging

For **Order related** customer interactions, **Tag Incident** button will be available for agents at a <u>Policy Level</u> and <u>Claim Level</u>.

- <u>Policy Level</u>: For any customer query on Policy or if a customer doesn't have any active claim but is having a registered policy, agents can use the Tag Incident option within the Ticket Action section of <u>Policy Detailed View</u> screen for that particular policy.
 - a. Agents can navigate to Policy Level Tag incident by one of these options
 - Search for a Policy, phone, email > 'View Policy' button > Policy Detailed View
 - Search for a Claim > 'View Claim' button > Claim Detailed View > 'Policy' button > Policy Detailed View

< ITION MAINTENANCE	REPAIR	VAS >	🖙 More Info 🛛 🕄 🔂 😨 🗄
	062922187323340	Search	Ticket Action TAG INCIDENT
Policy Details		• 2	POLICY
Customer Details			Additional Ticket Detail B Past Tickets El Sub Tickets
Customer Name Anagha	Mobile 996******		Search tickets Q = 0-0 of 0
Email ana****************	Alternative No 996******		
Pincode	State		
100000	Rajasthan		No.
City	Address		
JAIPUR	herjj4u64u45u4		No Data Found

- 2. <u>Claim Level</u>: For any customer query on any claim, agents can use the Tag Incident option within the Ticket Action section of <u>Claim Detailed View</u> screen for that particular claim.
 - a. Agents can navigate to Claim Level Tag incident by one of these options
 - i. Search for a Claim > 'View Claim' button > Claim Detailed View

- Search for a Policy, phone, email > 'Claim ID' link (*if claim is present*) > Claim Detailed View
- Search for a Policy, phone, email > 'View Policy' button > Policy Detailed
 View > Past Claim History > 'Claim ID' link (*if claim is present*) > Claim
 Detailed View

< ATION MAINTENANCE	REPAIR	VAS	>	🕞 More Info 🛛 🖗	5 💿 🗉 :
← CLAIM ID → Q CLAFLK765202	959226942	Sea	rch ×	Ticket Action TAG INCIDENT	
Claims	POLICY	VIEW CASE DETAILS		CLAIM	
				CANCEL CLAIM	TERMINAL ACTION
				REPAIR	
Claim View		^		😕 Past Tickets 🛛 🔠 Sub Tickets	5
Plan Extended_Warranty_AC	Policy Id PEXFLK0B06292218	7323340		Search tickets	Q = 1-1 of 1

Upon clicking the **Tag Incident** Button, a pop-up opens on the screen to input details for incident tagging.

• Based on the query from the Customer, the Agent will tag the incident into respective first level folders like **Chat, Outbound** and **Inbound**.

Œ	Ticket Dispose	×
	Click on selected folder level to remove it.	×
	Search folders	Clear All
	Main Folders	
	Outbound Inbound Chat View more >>	

• These **main folders** contain sub-folders, specifically **Complaint, Enquiry, and Request**. Agent needs to select one of the three sub-folders.

0	Ticket Dispose	×
Click on selected folder level to remove it.		×
Source	c	lear All
Ticket Type	Filter sub folders	×
Complaint Enquiry Request		

• Further, the agent needs to select a specific issue/query related folder from the list available.

Ticket Dispose	×
Click on selected folder level to remove it.	×
Source > Tricket Type Request	Clear All
Incident Type Filter sub fold	ers X
Cancellation of service Change Of Address Change Of Mobile Number	
Claim Registered_Payout_CMP Claim Registered_Repair_CMP Claim Registration	
Installation address change request Installation address change request denied-Non serviceal	ble

Upon selecting specific folders, the "Remarks" field will auto-populate based on the configured notes for the folder while agents can update the remarks as needed based on the customer query. Also, both the "Queue" and "Disposition Type" will be automatically chosen and rendered non-editable by greying them out, as shown below. Agent needs to click on the 'Submit' button to complete the incident tagging.

Ticket Dispose	×
Click on selected folder level to remove it.	×
Source > Ticket Type Incident Type Incident Type Claim Registration	Clear All
Select Queue	
Flipkart Jeeves (Me)	-
Remarks Customer called to register a service ticket. Agent to register the complaint for Service and share	the x date
Disposition Type Solved	
SUBMIT	

On completing the incident Tagging process as per above, an internal ticket will be created in Kapture for the Policy and it will be visible in the **Past Ticket** section as shown below.

🖙 More Info 🛛 🗿 🗊 🗉 🗄						
Ticket Action TAG INCIDENT						
POLICY						
Additional Ticket Detail						Ŧ
Sub Tickets						
Search tickets Q		Ŧ	0-0 of 0	<	0	>
Claim Registration PEXFLK0B062922187323340 N N/A 🛱 713497834733	G Flipkart Jeeves Low SO Solved Complete		Due Date:1	9-04-20	24 9:07 cs_v	7:14 'oice

Post this, agents need to dispose of the <u>Parent ticket (session)</u> by using the **Ticket Dispose** option as shown below. On click of the dispose icon, the session will be disposed automatically.

< ATION MAINTENANCE	REPAIR	VAS >	🛱 More Info 🛛 😩 🗿 📑 🔳
	062922187323340	Search X	Ticket Action TAG INCIDENT
Policy Details		• 2	POLICY
			Additional Ticket Detail
Customer Details		*	Past Tickets Sub Tickets
Customer Name Anagha	Mobile 996******		Search tickets Q = 1-1 of 1 < 0 >
Email ana***********************************	Alternative No 996****** State Rajasthan		Claim Registration PEXFLK08062922187323340 N/A 1713497834733 SO Solved Complete
City JAIPUR	Address herjj4u64u45u4		

Once the ticket has been disposed of as mentioned above, agents will be redirected to the Ticket listing page '<u>Assigned to Me</u>' section with a list of tickets assigned to the agent.



• Non–Order Related Incident Tagging

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For **Non-order related** customer interactions, Agents need to use the '**Add Sub Ticket'** option available in the '<u>Quick Actions</u>' area. This option is available for agents in the Ticket detail page irrespective of a policy or claim.

::		INSTALLATION	MAINTENANCE	REPAIR	' >	C More Info	Ø 🖡	3 🖪	■ :
1	←	PHONE V Q Sea	irch		Search	Customer Details	۵		
						Name	N/A		
\$						Mobile No	N/A		
Ľ			No.			Email	N/A		
			<u> </u>			Address	N/A		
			No Data Found						
						Past Tickets	💴 Sub Tickets		
						Search tickets	Q		
									Idd Sub Ticket
									3
								Ø	Quick Actions
								Data Saund	
							NO	Data Found	
									63

Upon clicking the **Add Sub Ticket** button, a pop-up opens on the screen to input details for tagging the incident.

• Based on the query from the Customer, the Agent will tag the incident into first level folder as **Inbound**.

< Add Sub Ticket	
Add Ticket Details	
Click on selected folder level to remove it.	×
Search folders	Clear All
Main Folders	
Inbound View more >>	



• This main folder contains subfolders, specifically **Complaint, Enquiry, and Request**. Agent needs to select one of the three sub-folders.

	×
	Clear All
Filter sub folders	×
	Filter sub folders

 Further, the agent needs to select a specific issue/query related folder from the list available.

< Add Sub Ticket	
Click on selected folder level to remove it.	×
Source > Ticket Type Inbound > Enquiry	Clear All
Incident Type Filter sub folders	×
Blank call/Call drop_VAS/PL Enquiry About Service Charges_VAS/PL Enquiry about vas policy validity/ T&C EW/CP Certificate resent Language Barrier Pre purchase-Enquiry about VAS Policy Redirected the customer to Brand Post policy - Service denial Enquiry About Service Charges Blank call/Call drop)

• Upon selecting specific folders, the "**Remarks**" field will auto-populate based on the configured notes for the folder while <u>agents can update the remarks</u> as needed based on the customer query. Also, both the "**Queue**" and "**Disposition Type**" will be automatically chosen and rendered **non-editable** by greying them out, as shown below.

< Add Sub Ticket	
Click on selected folder level to remove it.	×
Source > Ticket Type Incident Type Inbound > Enquiry > Blank call/Call drop_VAS/PL	Clear All
Remarks *	
Select Queue	
Flipkart Jeeves (Me) 👻	
Disposition Type	
Solved	•

 Post this agent needs to <u>Select Module Name</u> from the available list as well as <u>provide</u> details for the Enquiry Form based on the customer interaction.

Aodule Name	
VAS Large X · V	
Enquiry Form_Blank Call/Call Drop	
ustomer Phone Number	Customer Name
7654321234	Test Customer
rososs Namo	Disconnect Tune
rocess Name	Disconnect Type
Extended Warranty X 🗸 🗸	Customer
Extended Warranty X · V	Customer



• Finally, the agent needs to click on the '**Submit**' button to complete the tagging.

dd Ticket Details	
Click on selected folder level to remove it.	×
source > Total Type > Incident Type Blank call/call drop_VAGPL	Clear All
amarks *	
Call disconnected/ voice was not clear while assisting the customer	
rlect Queue	-
inneitine Tune	
Solved	-
Module Name	*
Module Name	
WAS Large X · · ·	
Enquiry Form_Blank Call/Call Drop	*
Customer Phone Number	Customer Name
7654321234	Test Customer
Process Name	Disconnect Type
Extended Warranty X · · ·	Customer X · V
Issue Remarks	
test_blank call	
	SURMIT

On completing the Tagging process as per above, an internal ticket will be created in Kapture and it will be visible in the **Sub-Tickets** section as shown below.

PHONE V Q Search	Search	Customer Details	<u>©</u>	
		Name	N/A	
		Mobile No	N/A	
8		Email	N/A	
		Address	N/A	
		Past Tickets	🖾 Sub Tickets	
		Blank call/Call	I drop_VAS/PL Inbound Enquiry Blank call/Call	Flipkart Jeeves
		Flipkart Jeeve	es 🛱 713597465110	SO Solved Complete

Additional options available to the agent

Below are a few additional options available for agents to use in Kapture.

- More Info (Ticket Details)
- Past Tickets
- Notes

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🗣 More Info	Ø 🖡 Ö	•	
Customer Details	9		
Name	Anagha		
Mobile No	******007		
Email	************************* m		
Address	ajddyqiuehue , undefined , JAIPUR ,		
😕 Past Tickets	🗵 Sub Tickets		
Search tickets	Q		< 0 >
Claim Re	gistration CLAFLK11122587141	5421	✓ Low SO Solver
Accessoria	es not available with Engineer CL 712827298741	AFLK111225871415421	 ✓ Low WI Waiting f A
Figure: Optio	ns on the Right sid	e of Ticket P <u>age</u>	

More Info

As implied by its name, the **Customer Details** tab provides information pertaining to the customer, including their **Name, Mobile Number, Email, Address, and SLA Status.**

🗣 More Info	
Customer Details	0
Name	Anagha
Mobile No	996******
Email	ana***********************************
Address	herjj4u64u45u4 , undefined , JAIPUR ,

Past Tickets

A Past Ticket will help the agent to know if the same customer (*with his Name, Contact Number, and Email in the database*) has raised any other ticket.

This segment provides specific information, including the Kapture Ticket ID, Ticket Status, Due Date, Assigned user, Incident Name, Ticket Priority.

Bast Tickets Sub Tickets			
Search tickets Q	÷	1-1 of 1 <	0 >
 Claim Registration PEXFLK0B062922187323340 N/A ¹ 713497834733 	 G Flipkart Jeeves ◯ Low SO Solved Complete 	Due Date:19-04	-2024 9:07:14 CS_Voice

Upon selecting a ticket within the **"Past Ticket"** section, a **"Web Viewer"** window will be launched, displaying relevant details associated with the selected past ticket.

web viewei				
INSTALLATION MAINTENANCE	REPAIR VAS >	D VNOTES	B. O X	
	Search			[] 1
	Scoreit	Notes System		2024-04-19, 09:07:15 am
Nicy ID PEXFLK08062922187323340	VIEW POLICY	Remark by Flipkart Jeeves: (for Service and share the x o	Eustomer called to registe date	r a service ticket. Agent to register the complaint
licy Status CLAIM_IN_PROGRESS Type VAS	Product AC	Notes		
and CROMA Start Date 2023-02-16	End Date 2026-02-15	System		2024-04-19, 09:07:15 am
in Name Extended Warranty		Additional details updated		
1ims CLAFLK765202959226942	IN_PROGRESS 💌			
		Past Tickets Sub	Tickets	
		Search tickets	Q	
			_	
			6)
			\sim	

Notes

It consists of a brief record of points or ideas written down related to the ticket. A new note can be created using the writing space given at the end of the screen. If there are no notes created it will show a message **"No Notes Found"**.

If the ticket has been resolved, the notes section will exhibit the "**Dispose Remarks**" for comprehensive record-keeping.

