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>

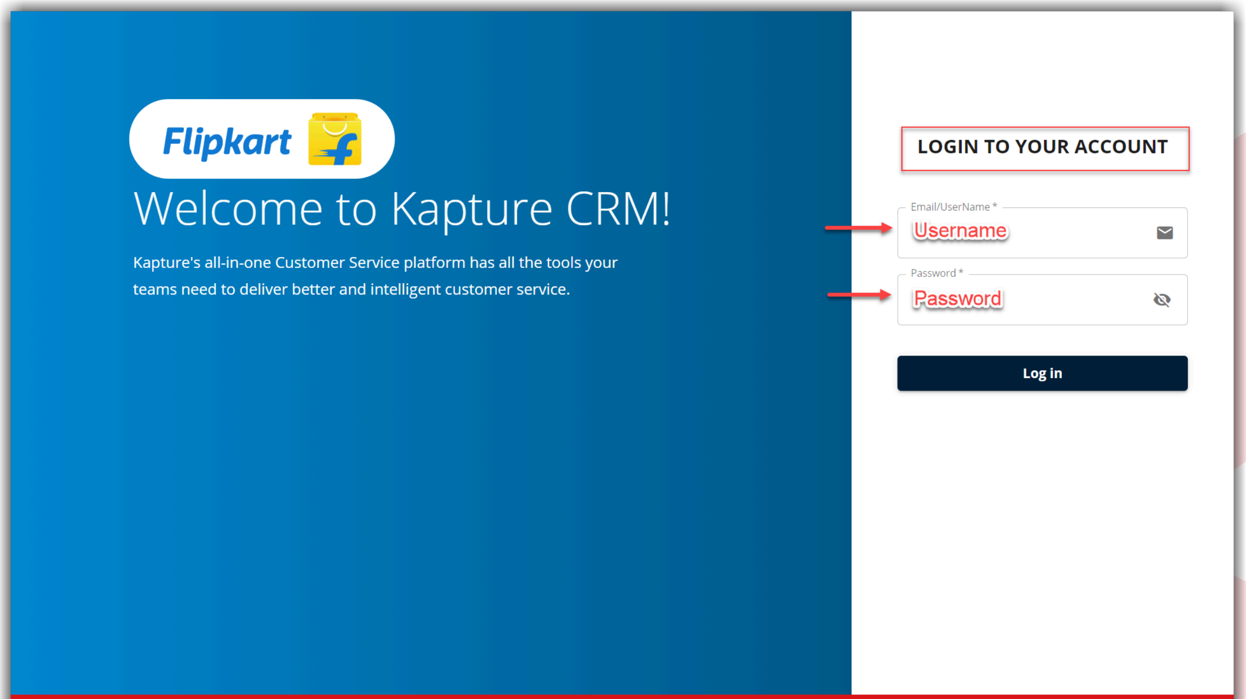


Figure: Account Login Screen

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?

Step 1:

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

Figure: Not Available

Step 2:

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

Figure: Available

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.

Step 2:

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

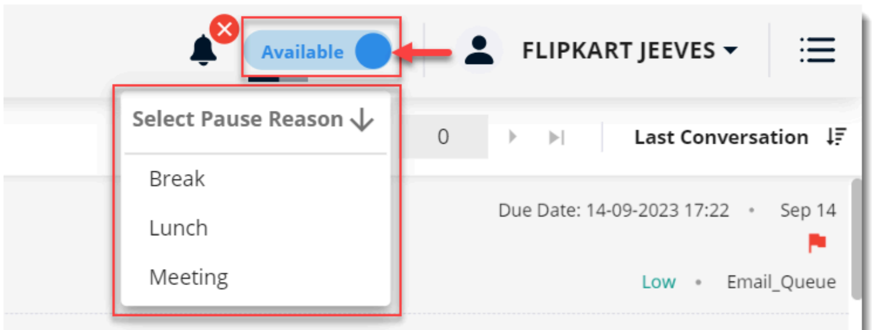


Figure: Pause Reason

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

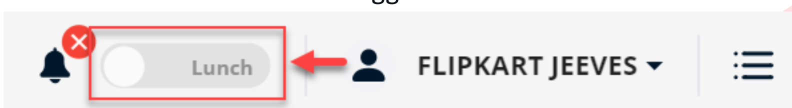


Figure: Selected Pause Reason

Review Notifications

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

Figure: Notification Bell

How to Logout?

Step 1: Click on the user profile tab.

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

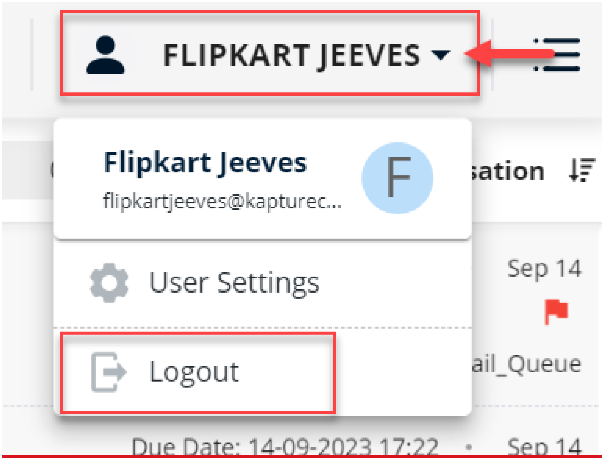


Figure: Logout Option

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.

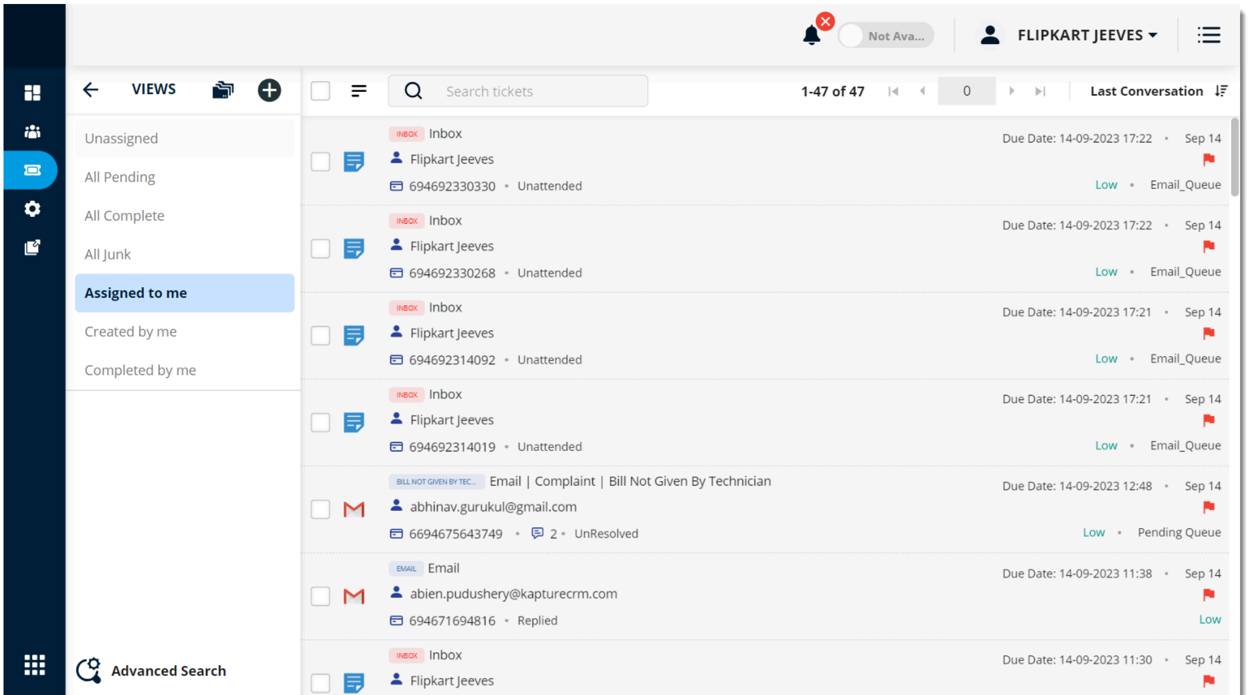


Figure: Tickets Page

How L1 Agent Work on a VAS Created Ticket

1. Plus Sign - Add Ticket Option

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

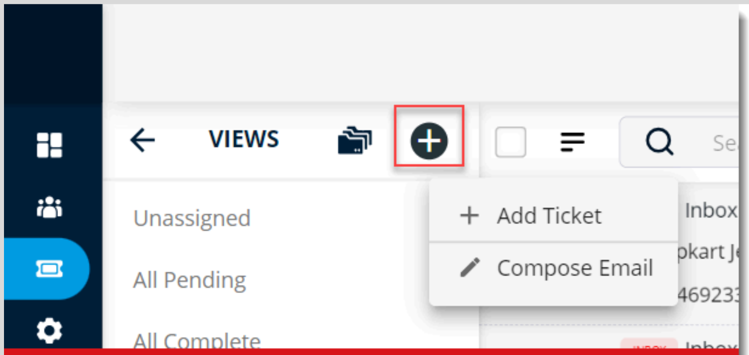


Figure: Plus Sign

2. Add Ticket Tab

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

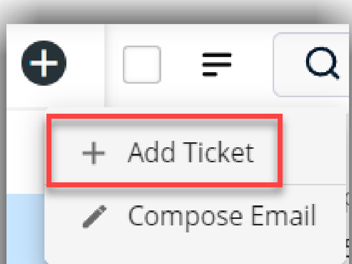
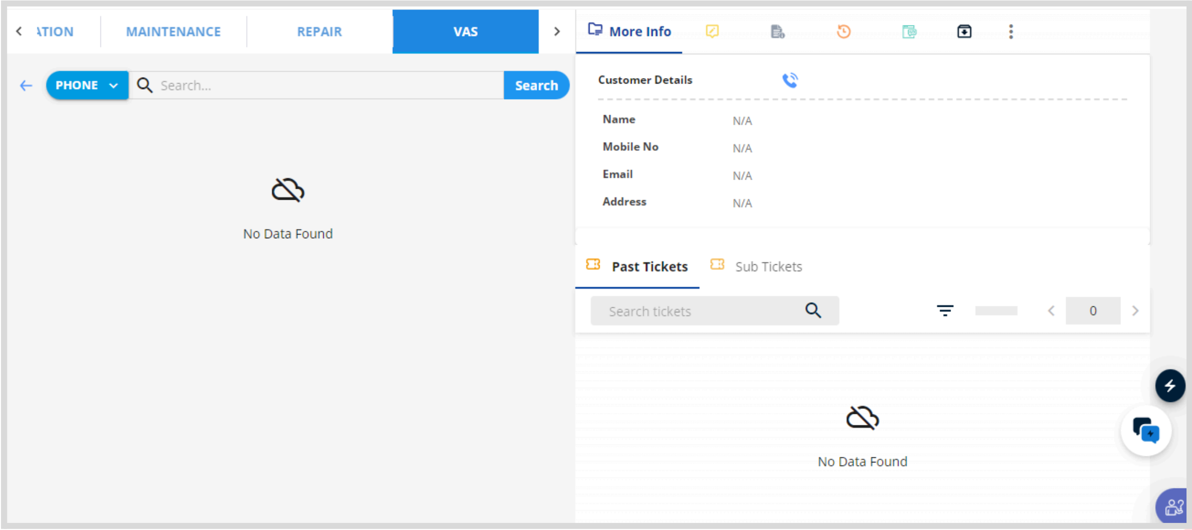


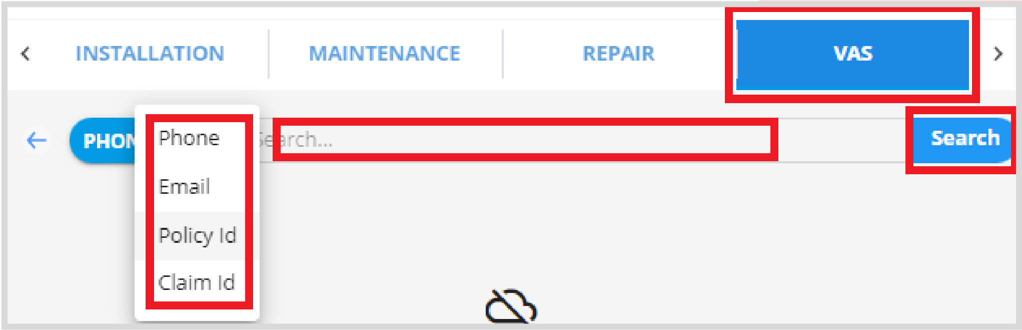
Figure: Add Ticket

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.



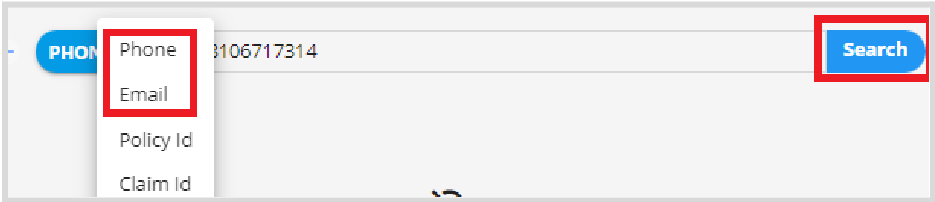
- The agent has to click on the **VAS** tab to search and find any information of customers related to VAS. Within VAS tab, agents can search for customer details using the following options provided:
  - Phone: Registered phone number(s) of customers
  - Email: Registered Email addresses of customers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



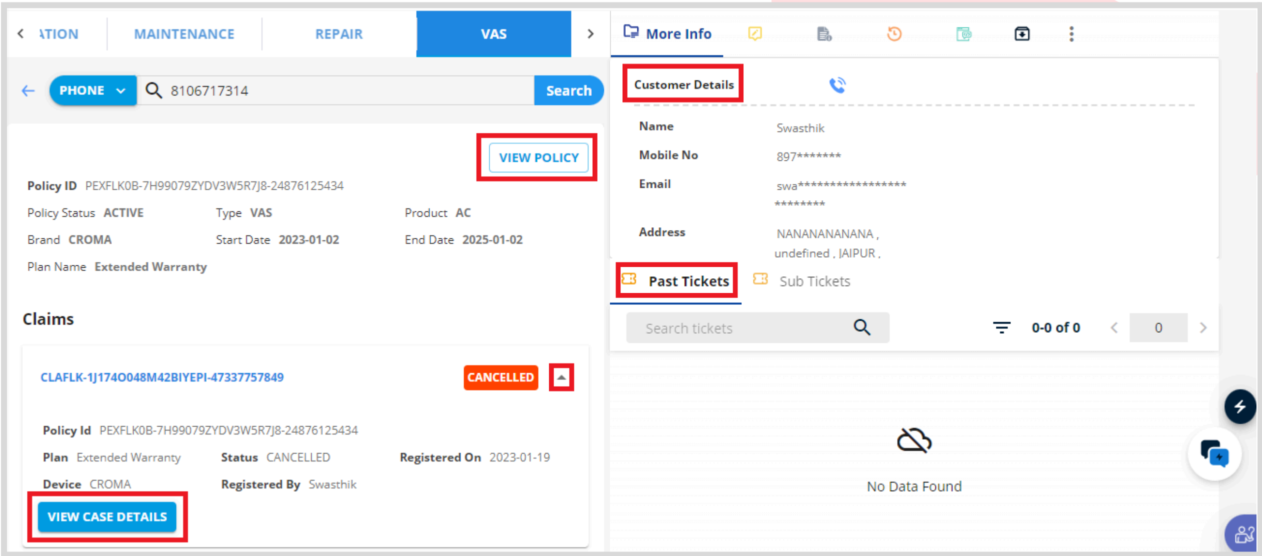
- Please note that the search results displayed after performing search by phone or email is a list of policies while search by policy id will result in specific policy and search by claim id will result in specific claim.

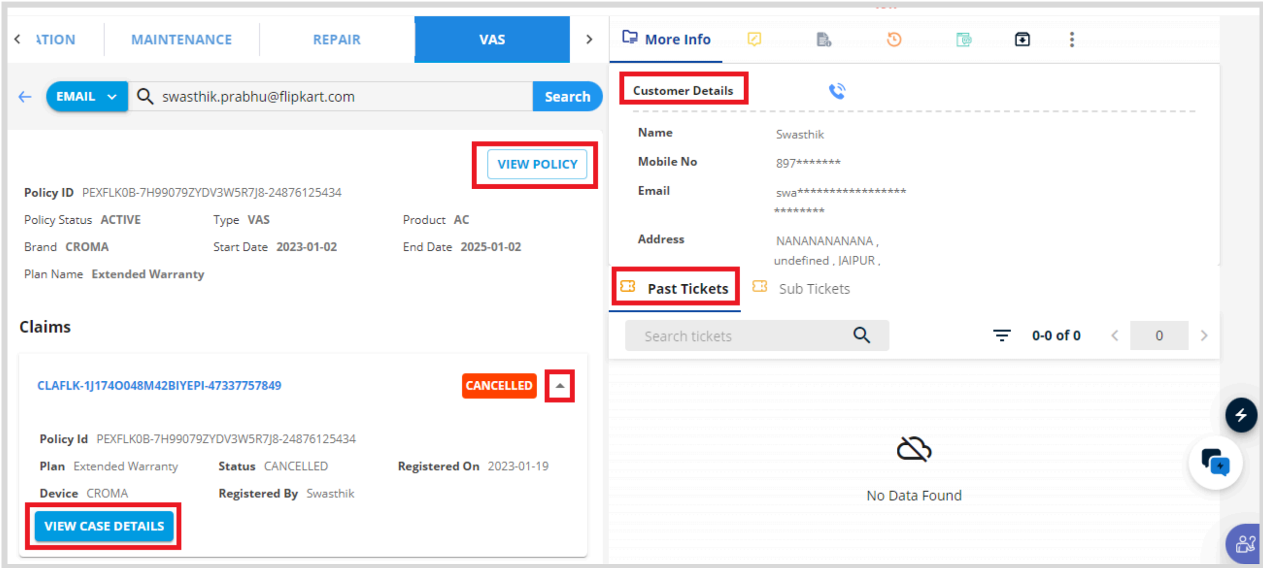
3. Phone and Email Search

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



- 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 registered phone number or registered email address of the customer and click on the 'Search' button to get the policy or claim details.
- The search results will display a list of Policies 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 Customer Details section and any past tickets associated with the searched email id or phone number in the Past Tickets section





- 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'.

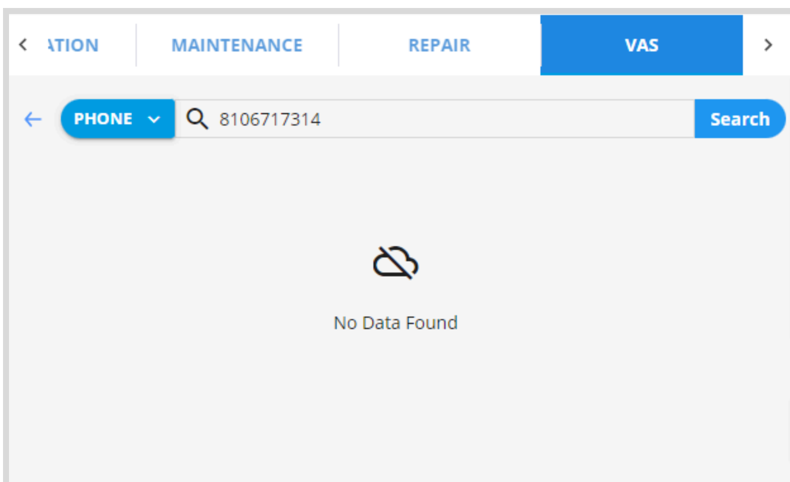
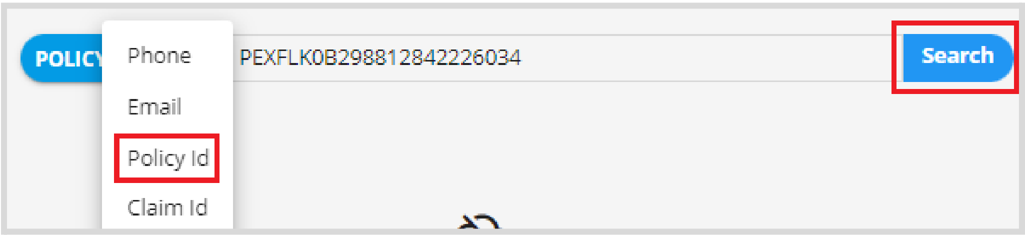


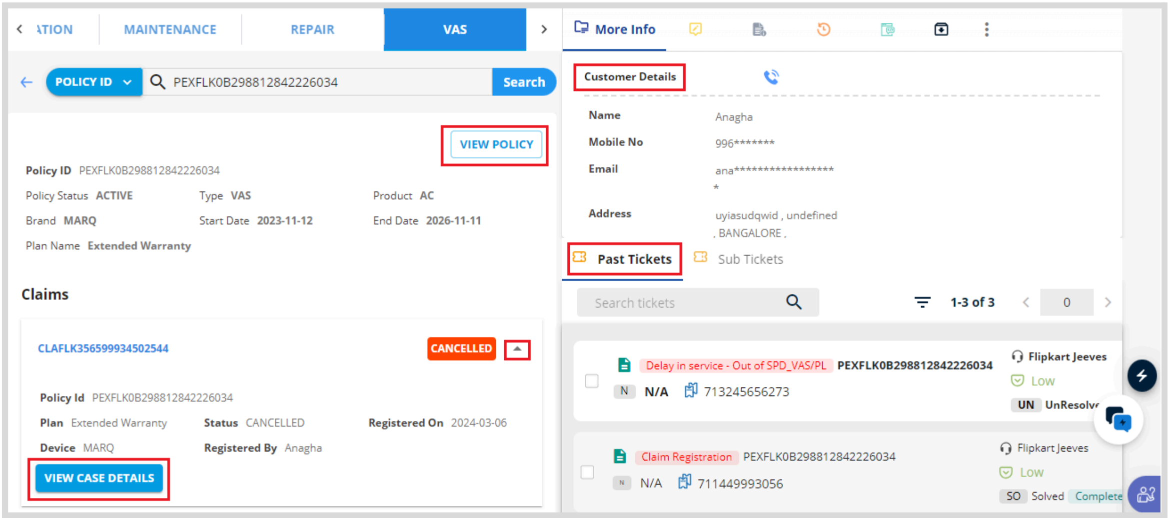
Figure: Phone search with no results

4. Policy ID Search

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



- Policy Id: 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 Customer Details section and any past tickets associated with the searched policy id in the Past Tickets section



- 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'.

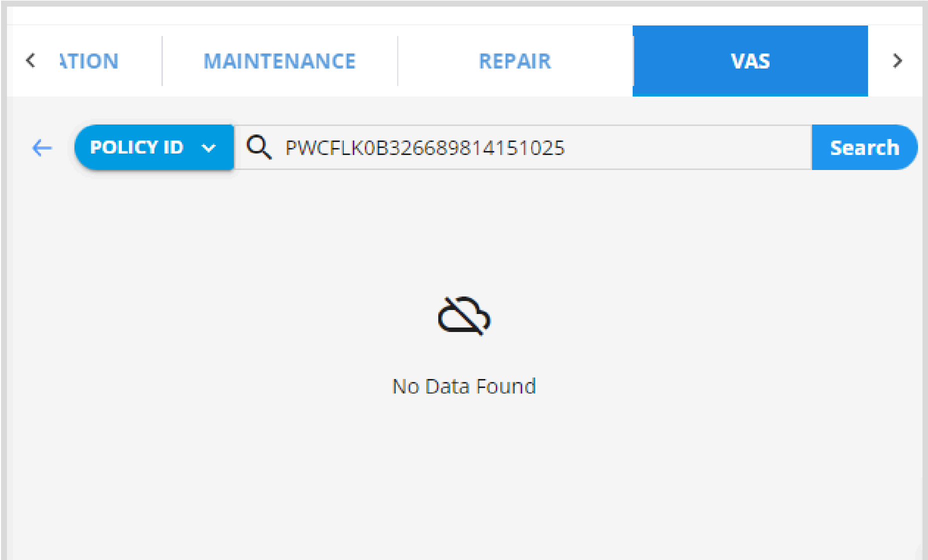
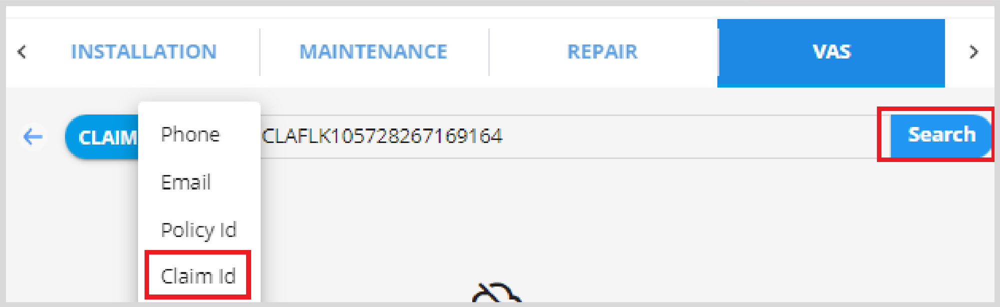


Figure: Policy search with no results

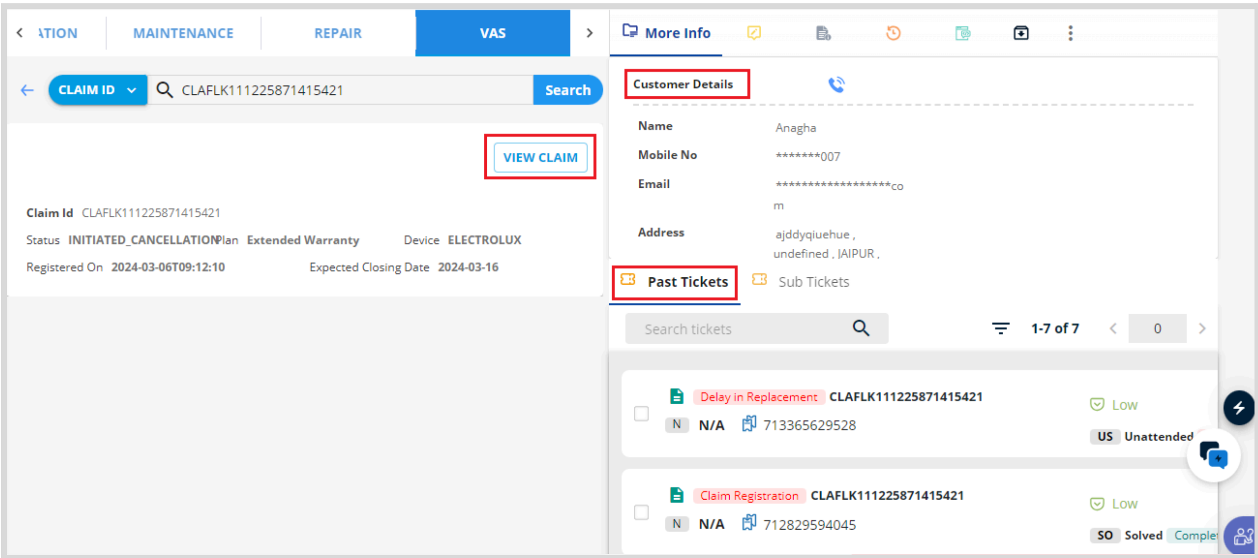
5. Claim ID Search

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



- 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



- 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'.

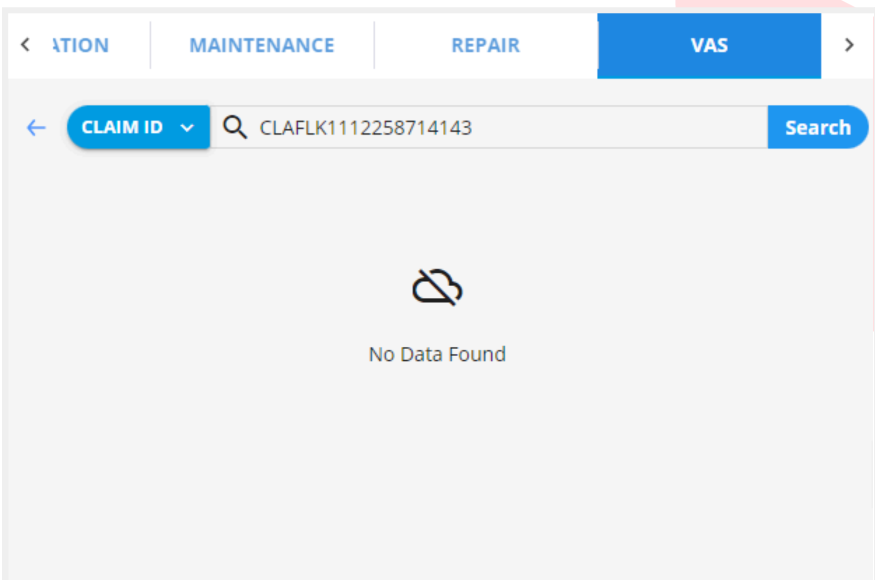


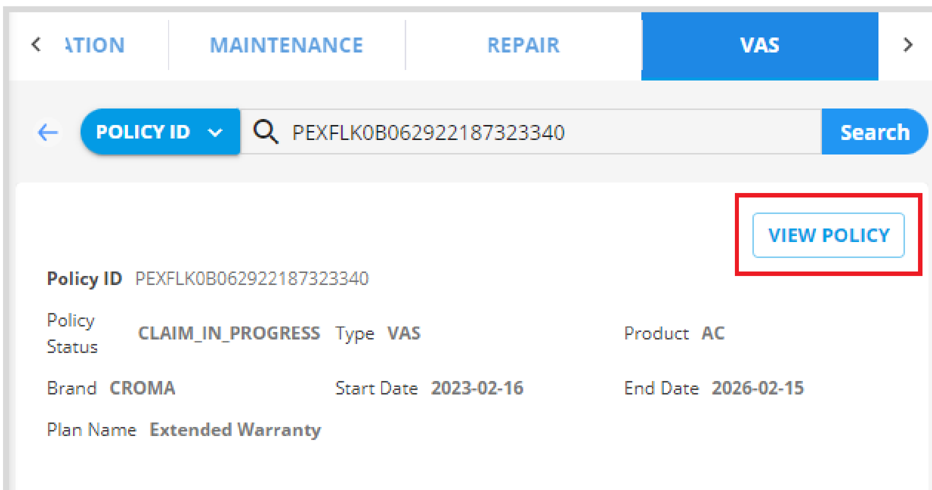
Figure: Claim search with no results

6. Policy Detailed View

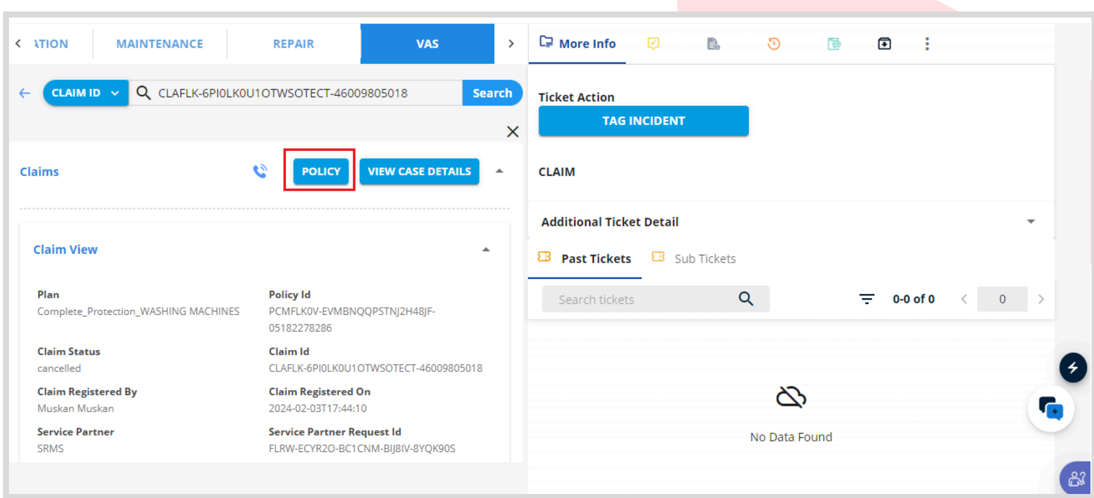
Policy Detailed View provides users with detailed information related to the Policy purchased by the customer.

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

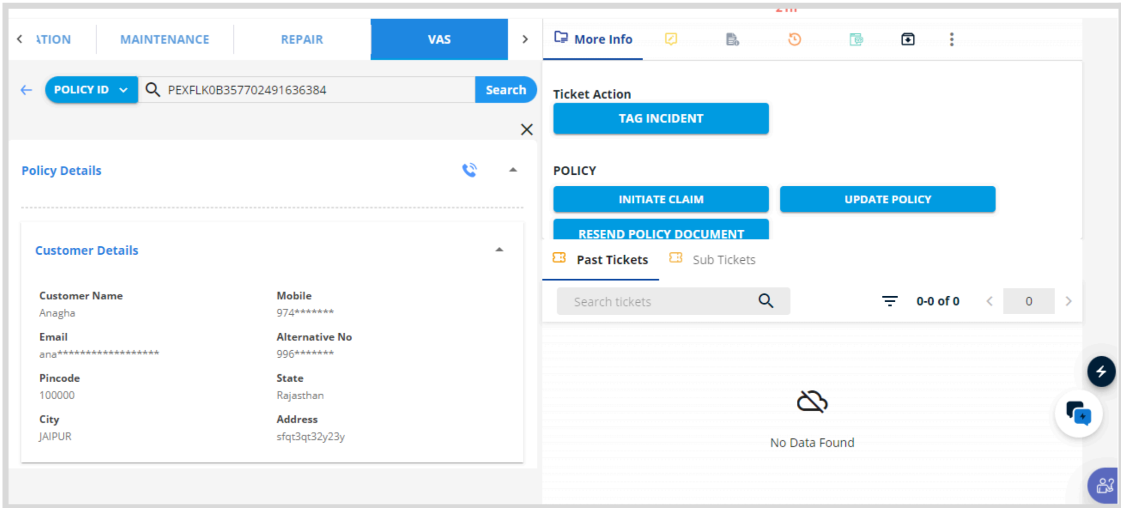
1. Clicking on the '**View Policy**' button within the Policy listing section which will be available after performing search via Policy ID, Phone or Email id.



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



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



- 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.

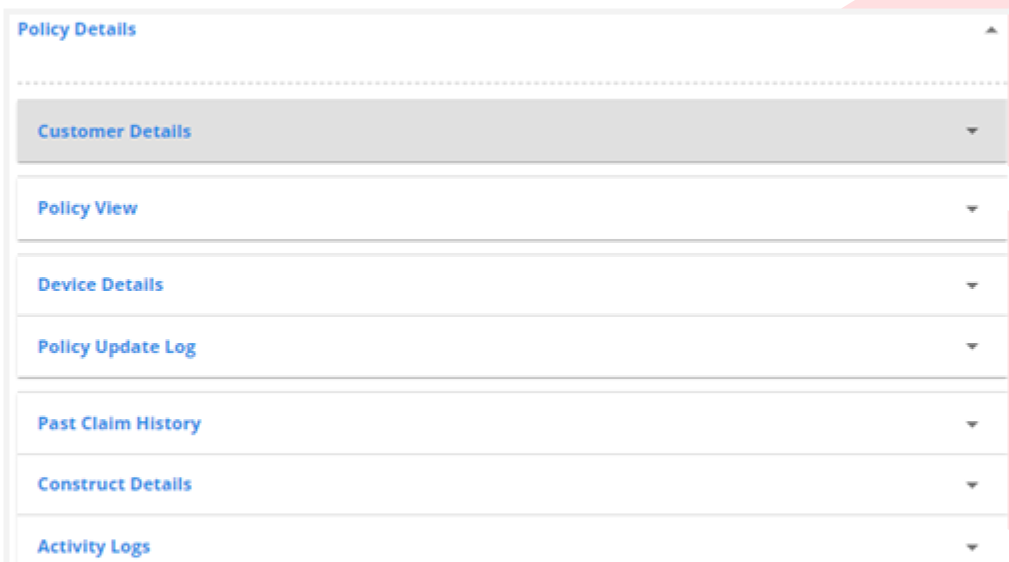


Figure: Policy Details

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 n*ame, mobile number, email address, pin code, state, city, and address*.

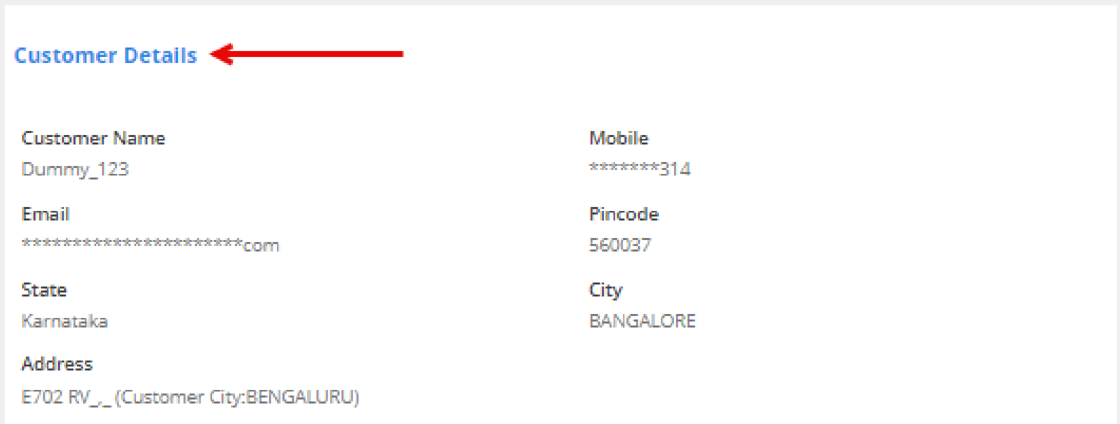


Figure: Customer Details

<u>Policy View</u>: 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*.

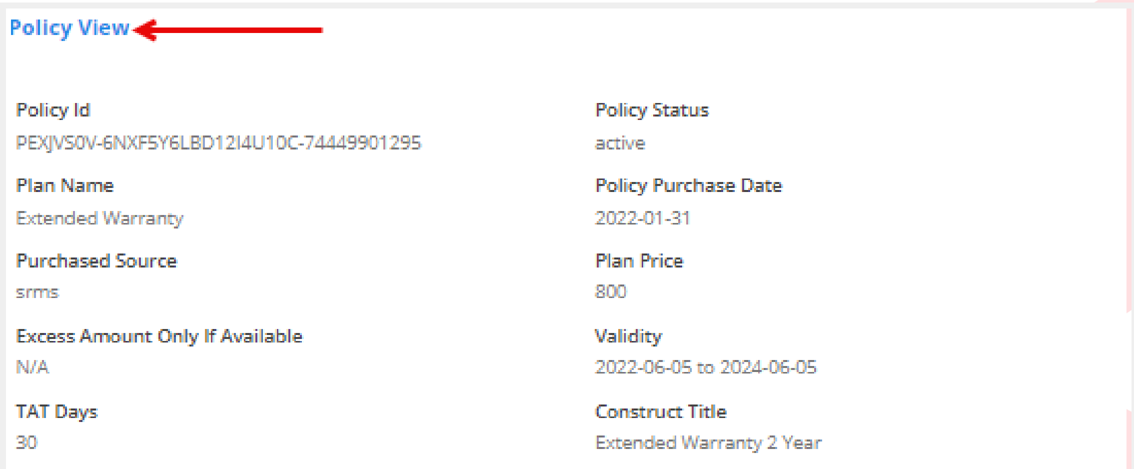


Figure: Policy View

<u>Device Details</u>: 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*.

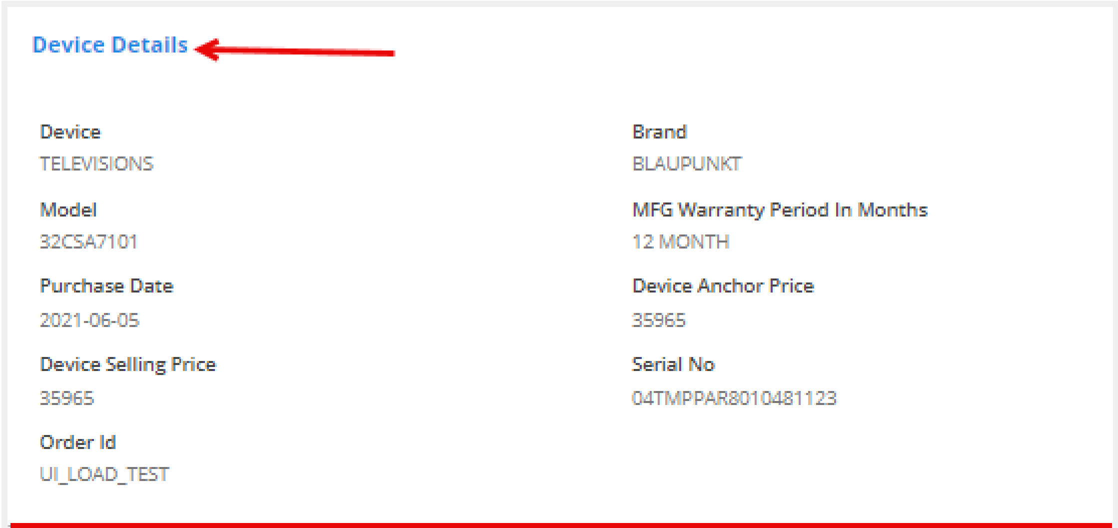


Figure: Device Details

<u>Policy Update Log</u>: 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.

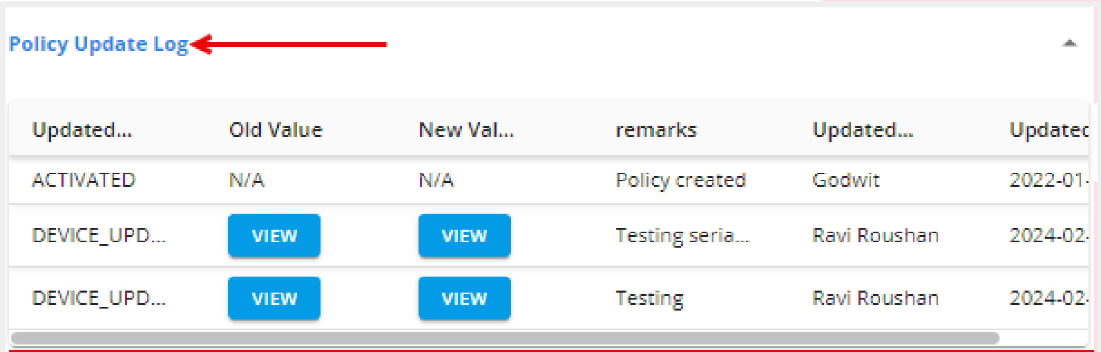


Figure: Policy Update Log

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*.

Construct Details

Tenure In Months
24 MONTH

Max Count Claims
-1

Repair Mode Construct Level
On-site

Starts From
Expiration of Brand Warranty

Spare Parts Category
Brand Authorised

Figure: Construct Details

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-1OFQE0VZ	Complete Pr...	PCMFLKOV-8...	COMPLETED	2023-05-29	MOTOROLA	Jyotish Kumar
CLAFLK-DYH05UU!	Complete Pr...	PCMFLKOV-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...	PCMFLKOV-8...	COMPLETED	2023-12-23	MOTOROLA	Jyotish Kumar
CLAFLK290605685	Complete Pr...	PCMFLKOV-8...	COMPLETED	2024-02-20	MOTOROLA	Jyotish Kumar
CLAFLK631262253	Complete Pr...	PCMFLKOV-8...	IN_PROGRESS	2024-03-11	MOTOROLA	Jyotish Kumar

Figure: Past Claim History

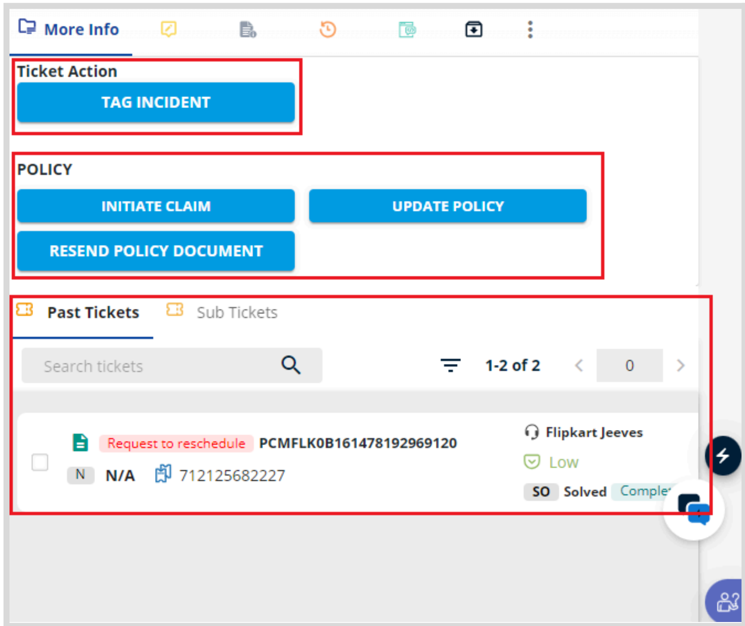
Activity Logs: This section contains a record of all the activities associated with the particular policy with information such as *Status, Purpose, Remarks, Updated By, Updated On and Reason.*

Activity Logs

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

Figure: Active Logs

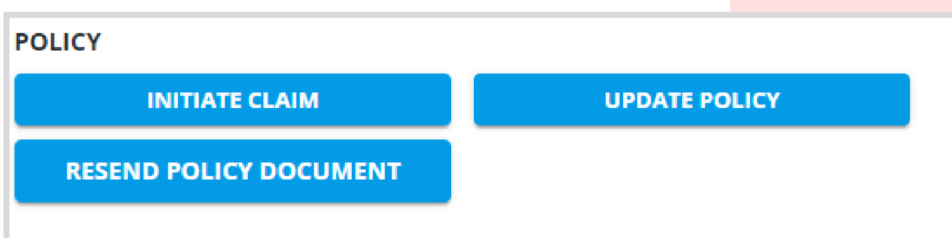
- On the right side of the Policy details view, the agent will be able to access the available actions associated with the Policy, Kapture Ticket as well as the Past tickets associated with the policy.



➢ Policy Actions

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

<u>**Note**</u>**:** 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.

- **Resend Policy Document**

  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.

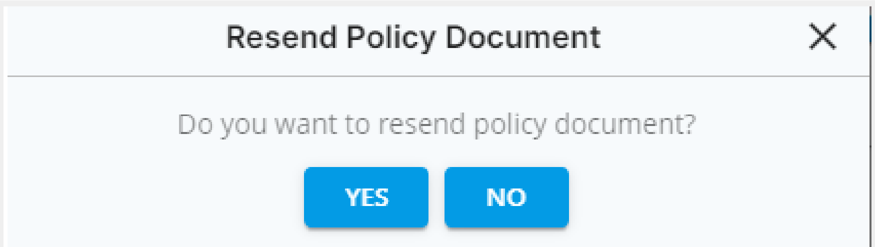
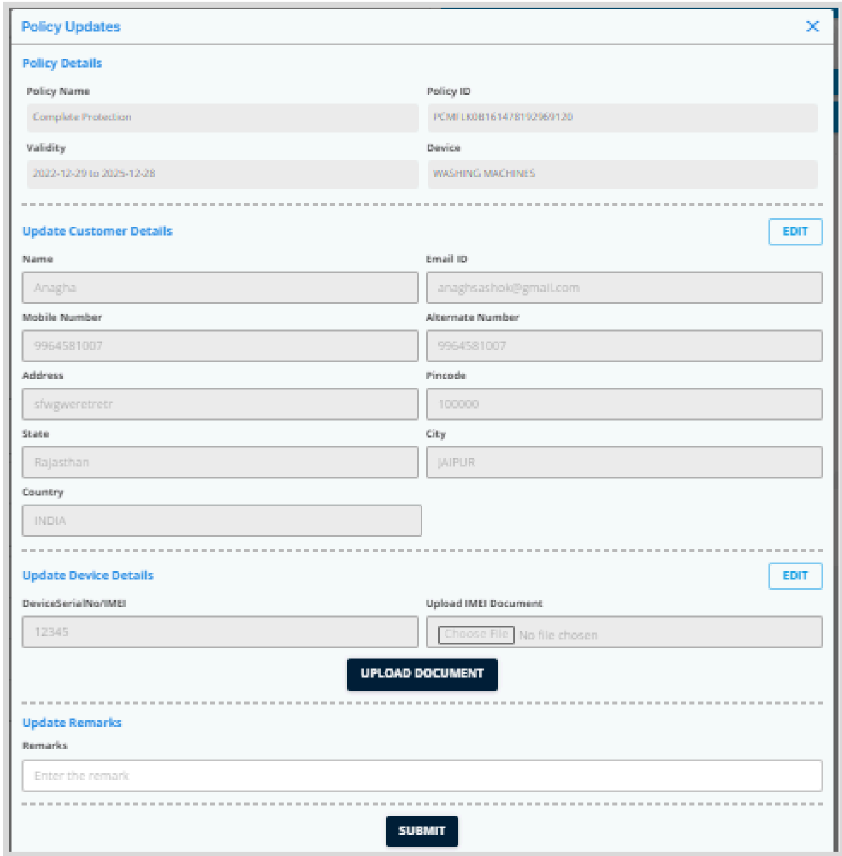


Figure: Resend Policy Document

- **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 ‘Update Policy’ button, a new pop-up opens up for agents to update the policy details.



Agents can update the **KYC** for customers in the Update Customer Details section.

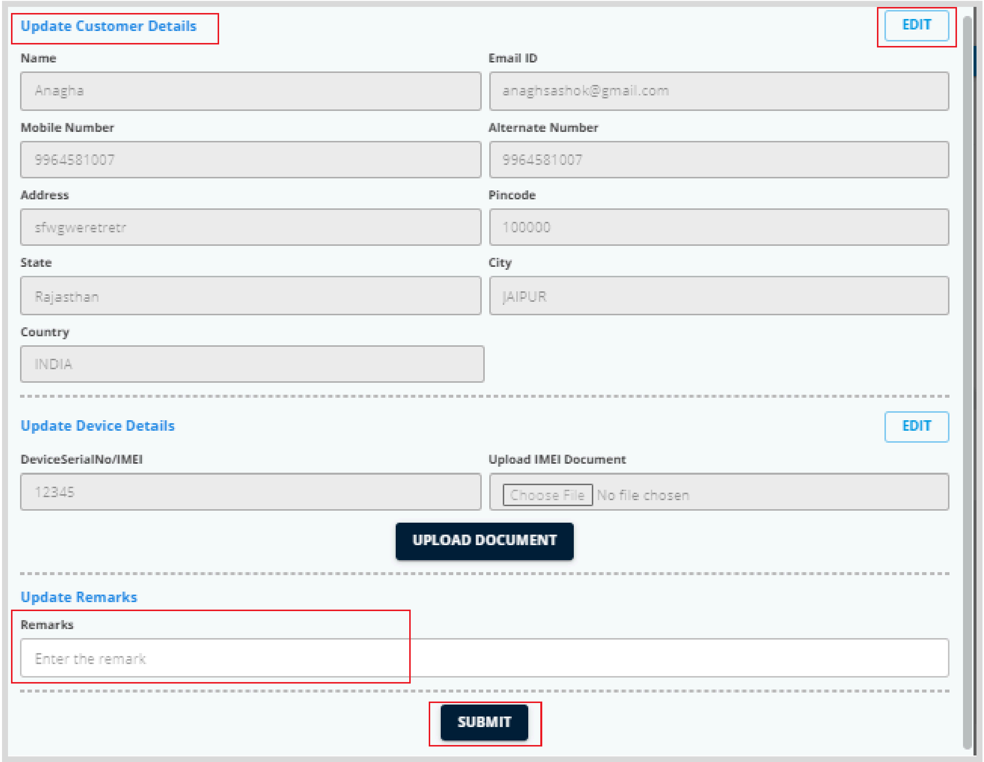
Step 1: Click on the **Edit** button to start modifying/updating the KYC details

Step 2: Update the relevant KYC details.

Note: 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



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

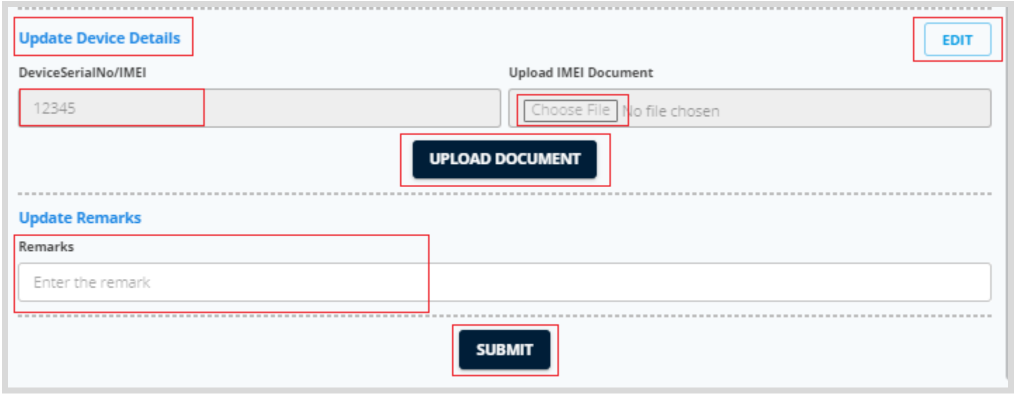
Step 2: Select the new replacement document from the agent's computer system by clicking on ‘Choose File’

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

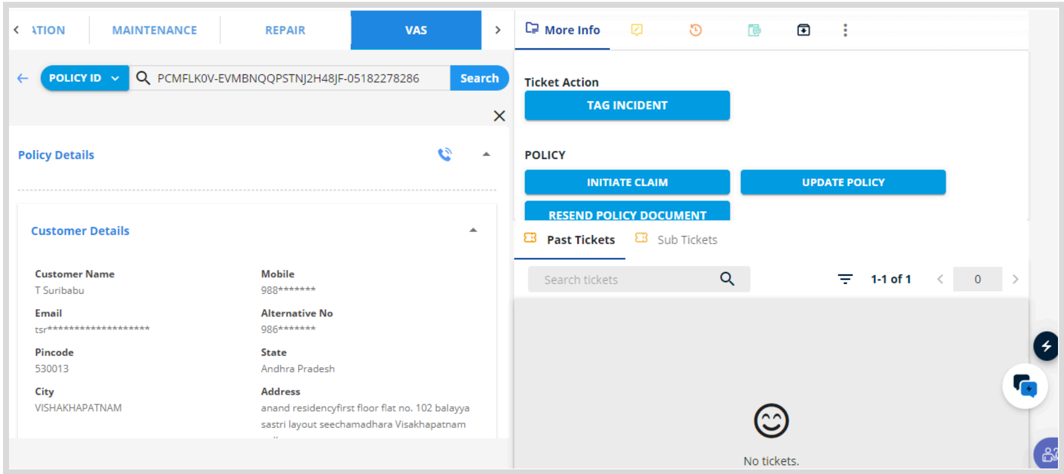
Step 4: Click on ‘**Upload Documen**t’ to upload the new replacement document

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

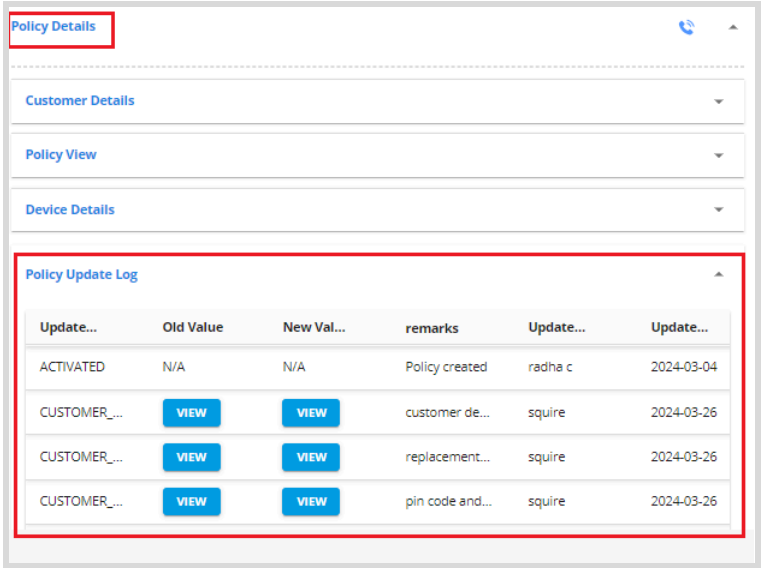
Step 6: Click on the ‘**Submit**’ button to complete the process



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



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.



- **<u>Initiate Claim</u>**

  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.

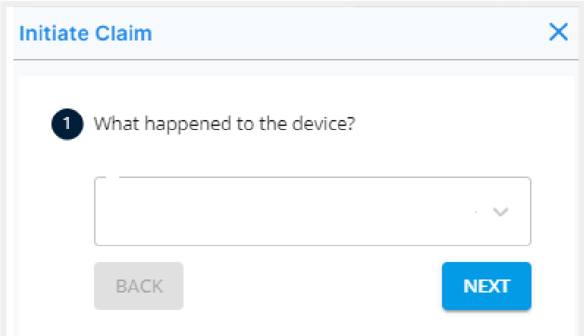
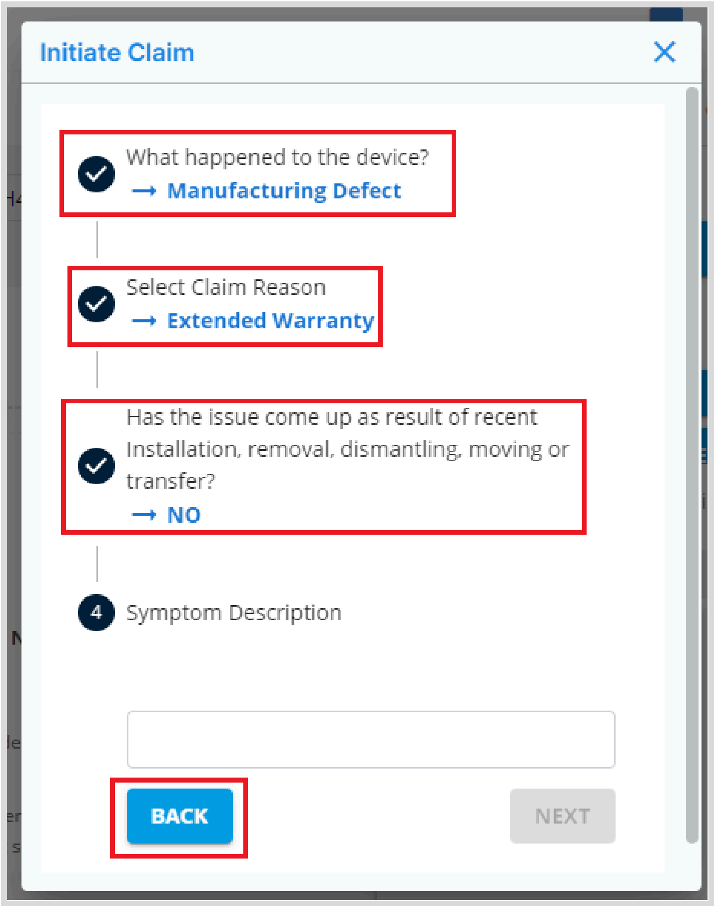


Figure: Initiate Claim

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

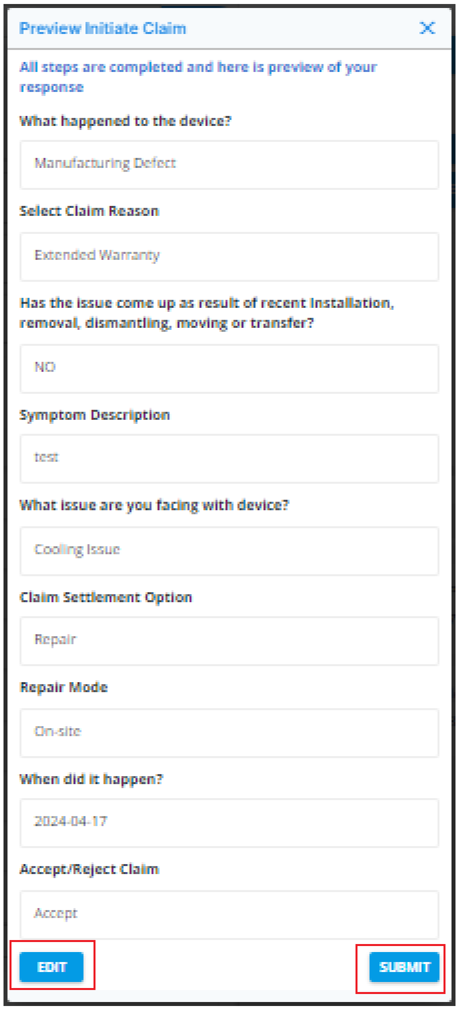
Step 2: Continue with the questionnaire until a summary screen appears. Incase, agent needs to go back and review/change the answer for any of the question(s) during this process, use the **Back** button or Click on the particular **question**



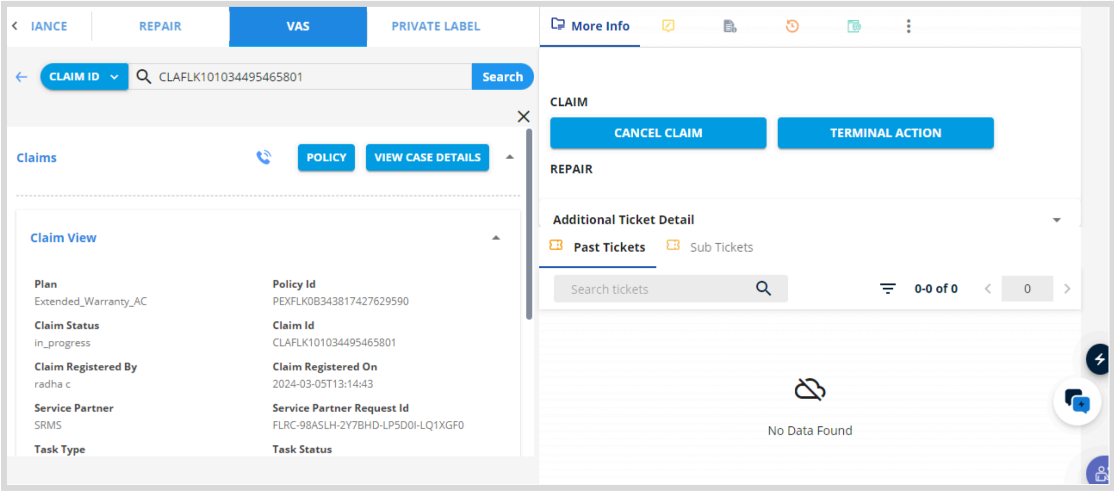
Step 3: A summary screen appears upon completing the questions, agent needs to review the answers provided for the KYI questions

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



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

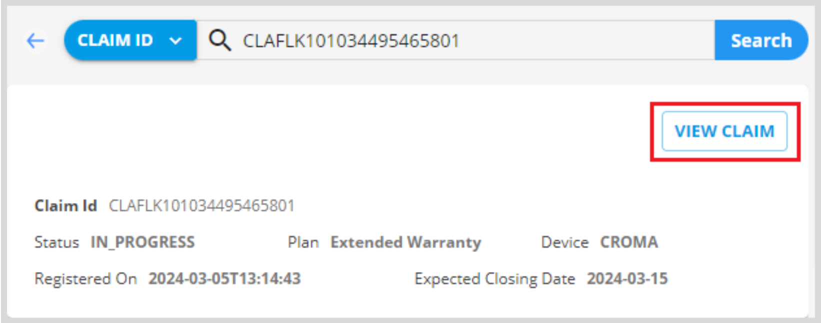


7. Claim Detailed View

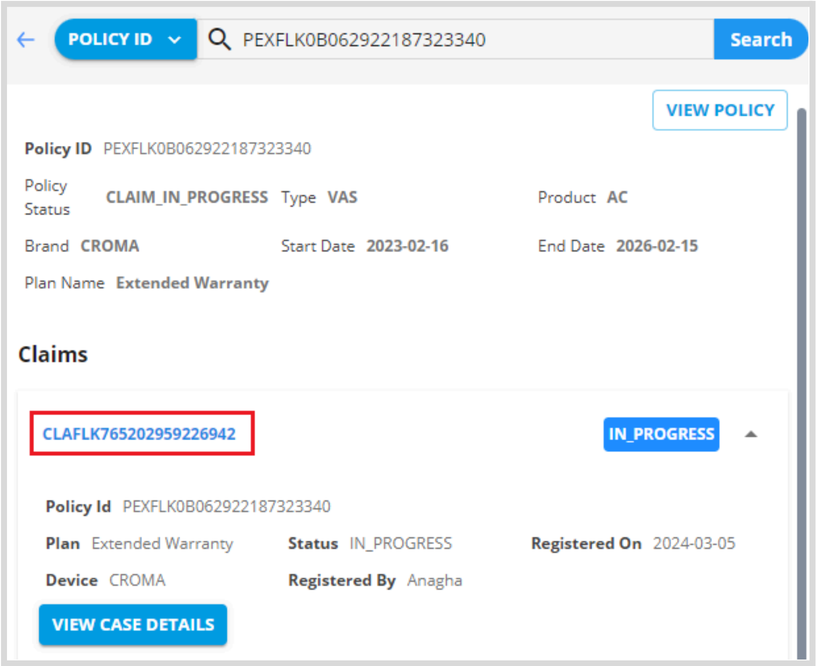
Claim Detailed View provides users with detailed information related to the claim associated with the policy purchased by the customer.

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

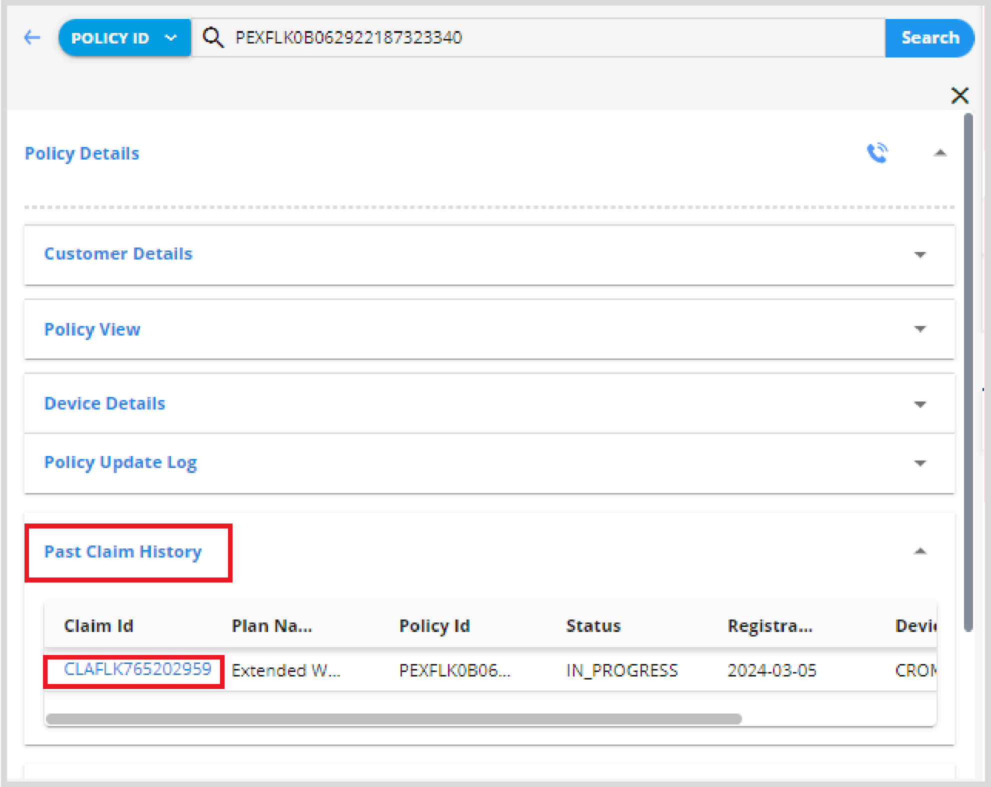
1. Clicking on the '**View Claim**' button within the claim listing section which will be available after performing search via Claim ID, Phone or Email id.



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.



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.



- Let's now investigate the various views accessible in the Claim Details screen.
    - On the left side of the Claim Details view, 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.

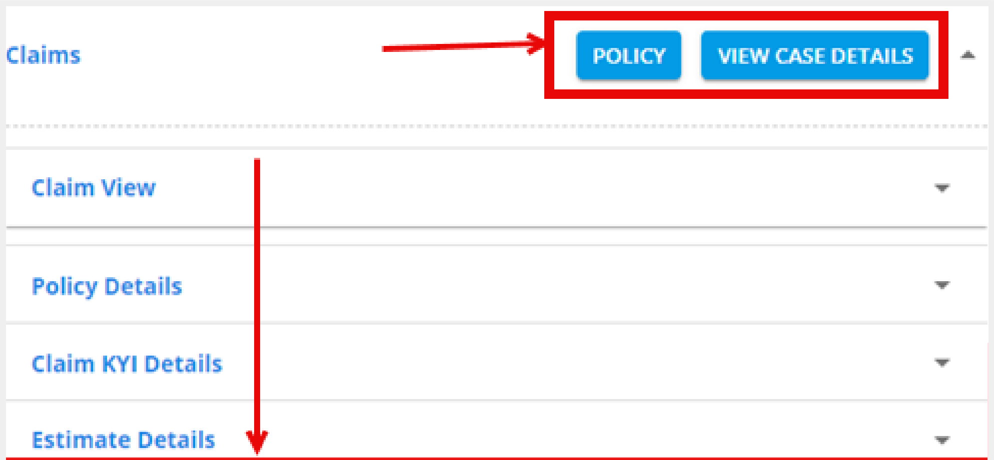


Figure: Claims Details

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

Claim View: 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).*

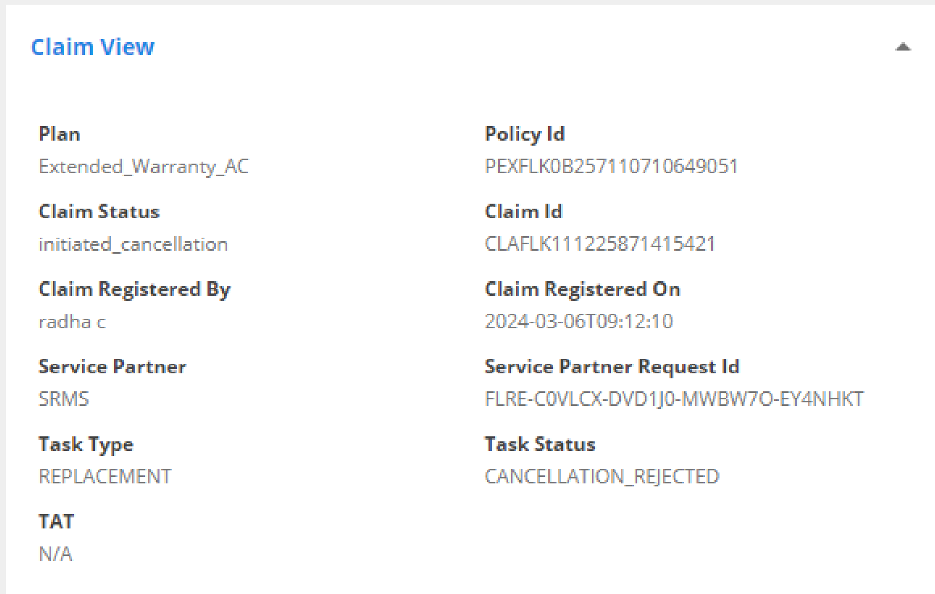


Figure: Claim View

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.

Customer details: This section contains customer details like n*ame, mobile number, email address, pin code, state, city, and address*.

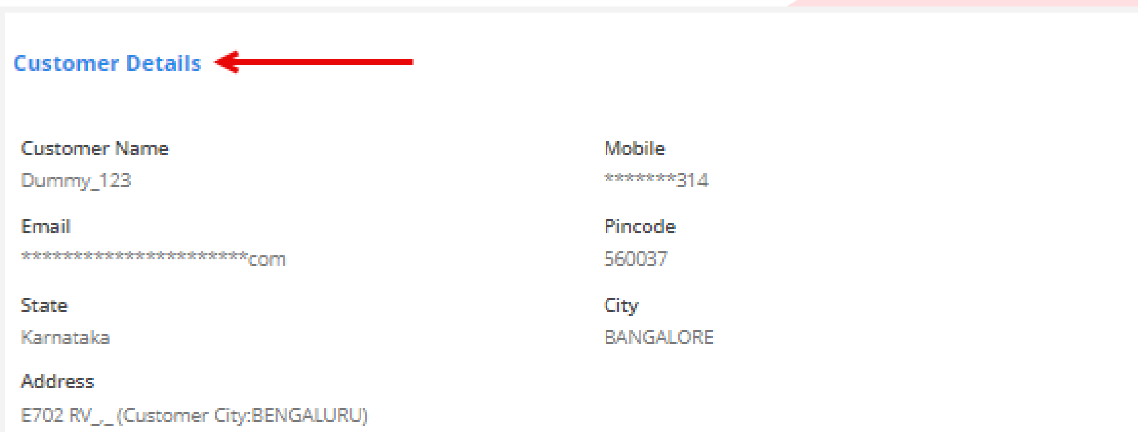
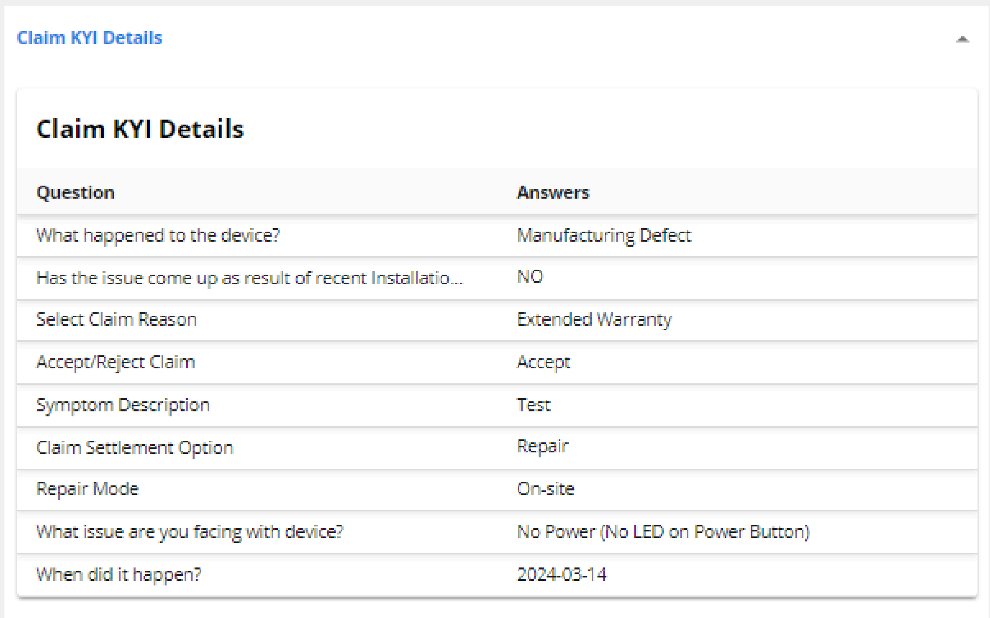


Figure: Customer Details

Claim KYI: This section contains the KYI details provided by the customer while submitting the claim.



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

Figure: Claim KYI Details

<u>Estimate Details</u>: 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.

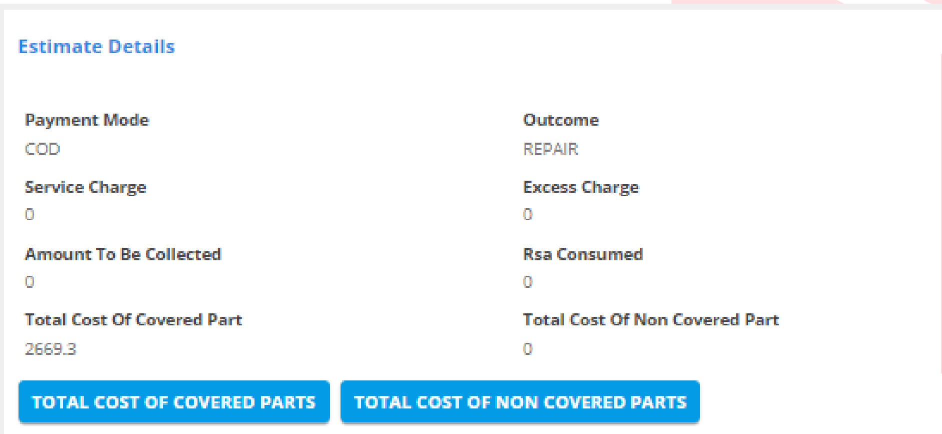


Figure: Estimate Details

<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 1	**Pickup Status** Yes
Remarks Test	**Payment Date** 30-03-2024, 12:30:20

Figure: UCP Proces Refund

Claim Activity Logs: 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.*

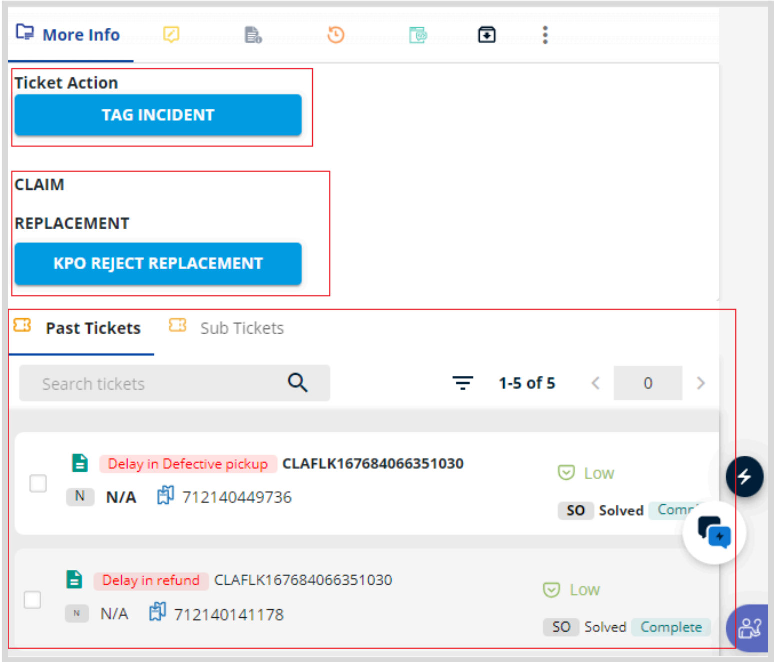
Claim Activity Logs

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 r<u>ight side of the claim detailed view</u>, 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.



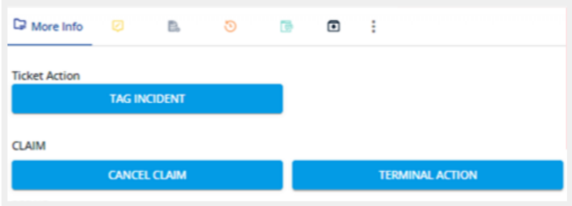
➢ Claim Actions

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

<u>Note:</u> 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.

- **<u>Cancel Claim</u>**

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.



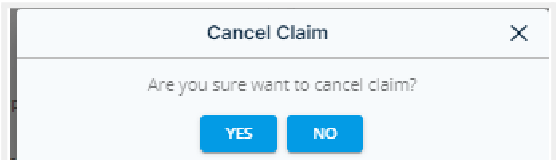
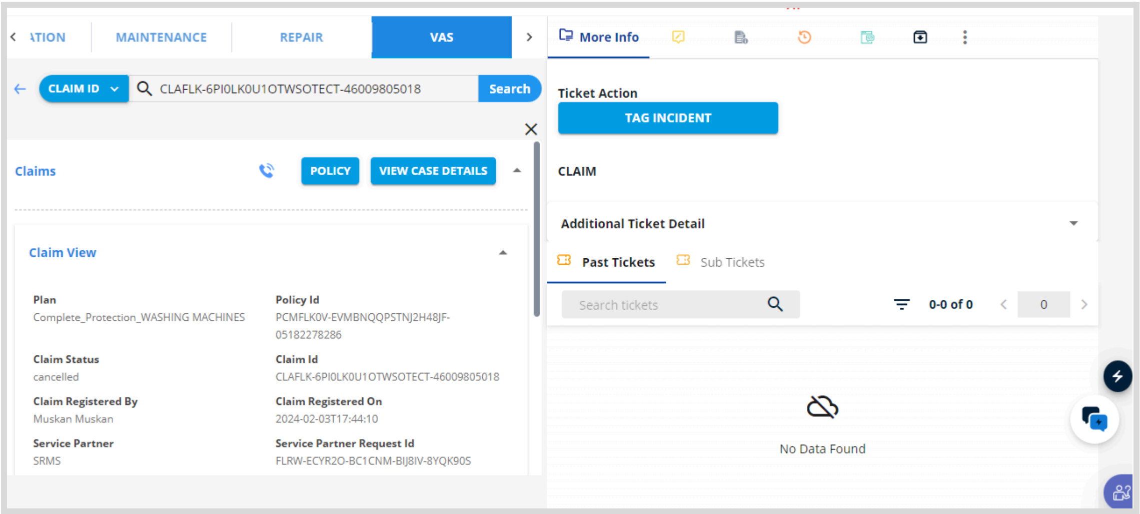


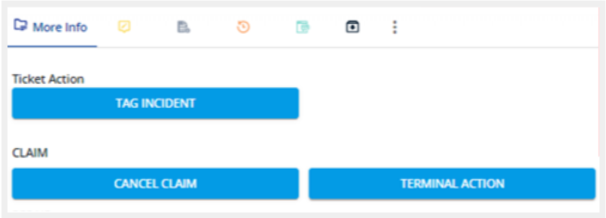
Figure: Cancel Claim

After completing the above action, pop-up closes and the user will be on the same claim detailed view itself



- **Terminal Action**

  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.



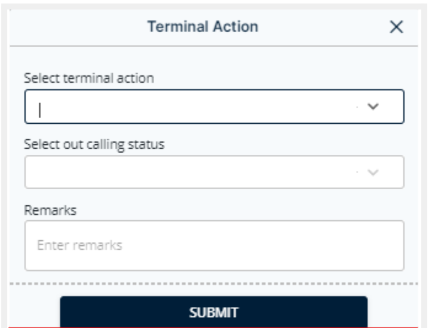
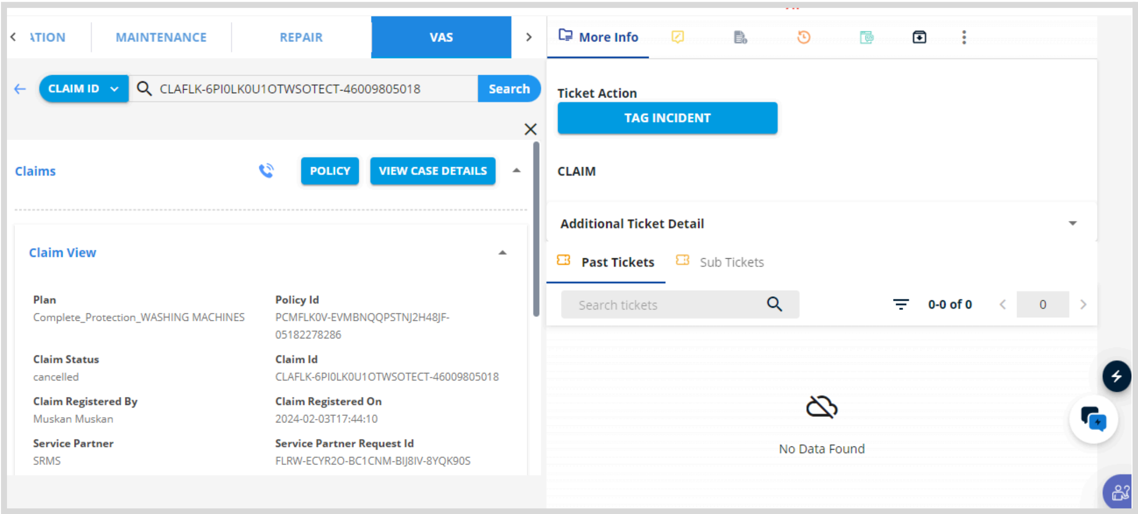


Figure: Terminal Action

After completing the above action, pop-up closes and the user will be on the same claim detailed view itself.



- **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.

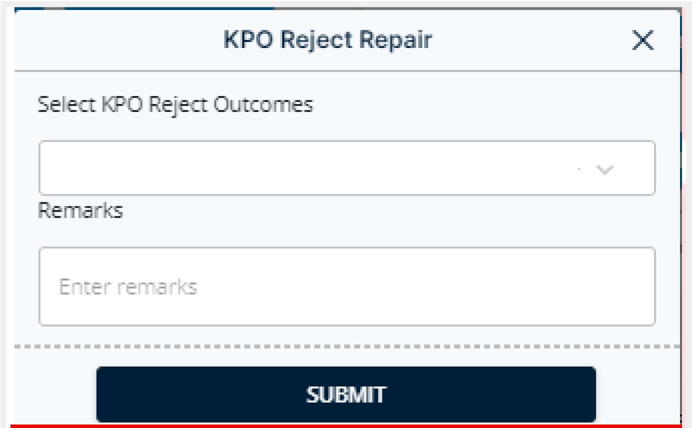
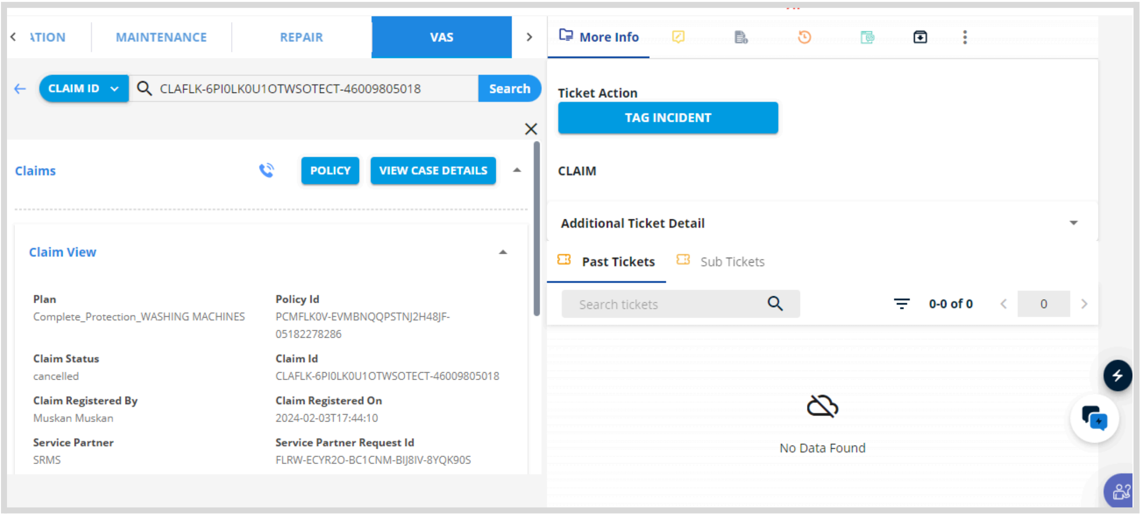


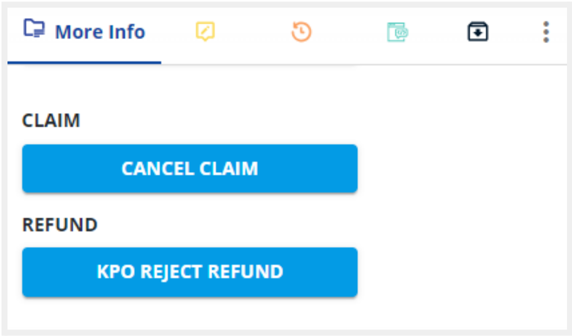
Figure: KPO Reject Repair

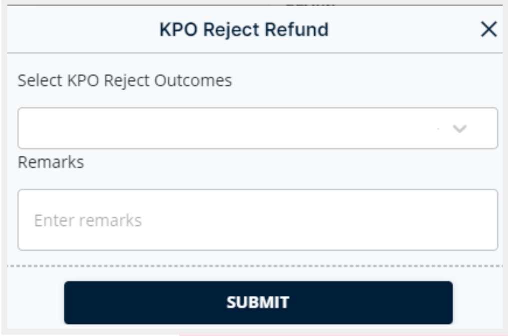
After completing the above action, the pop-up closes and the user will be on the same claim detailed view itself.



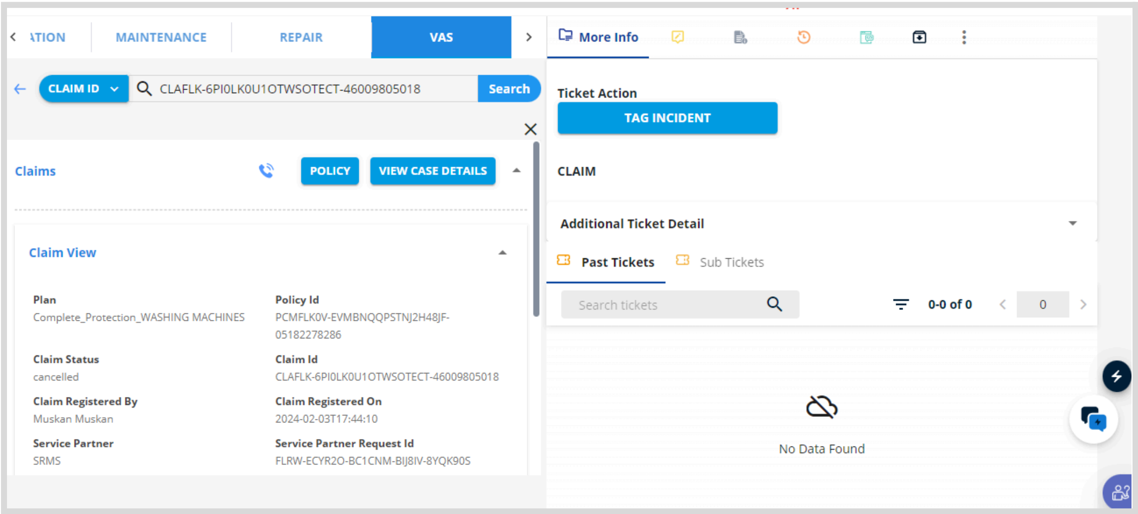
- **<u>KPO Reject Refund</u>**

  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.



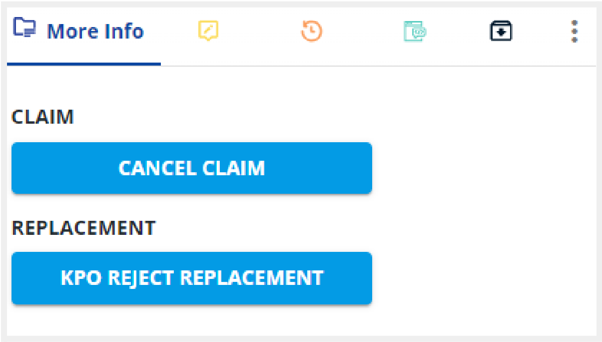


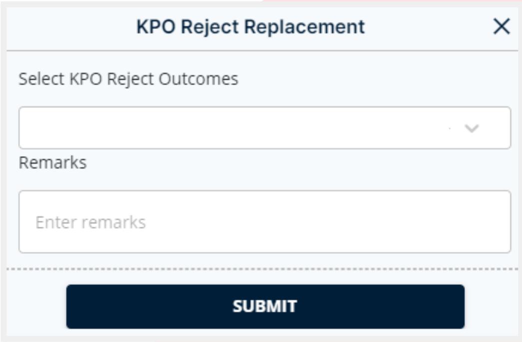
After completing the above action, the pop-up closes and the user will be on the same claim detailed view itself.



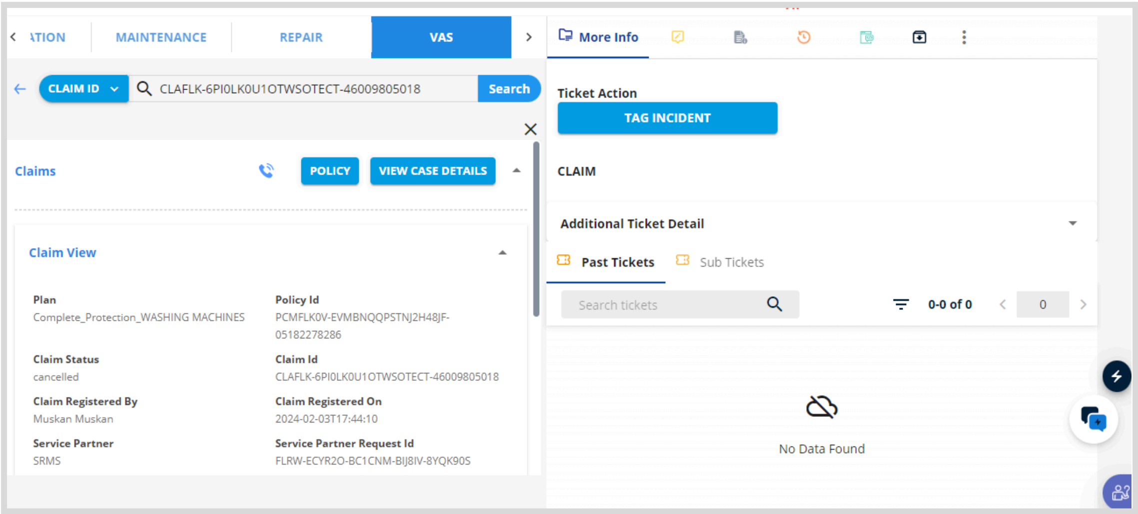
- **KPO Reject Replacement**

  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.

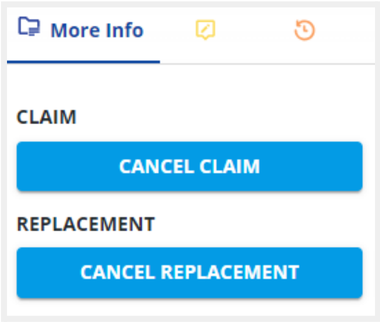


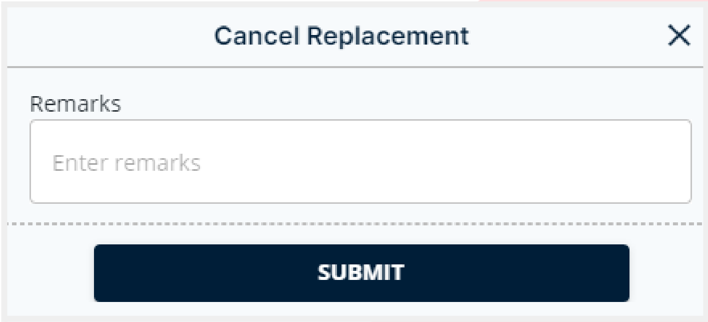


After completing the above action, the pop-up closes and the user will be on the same claim detailed view itself.

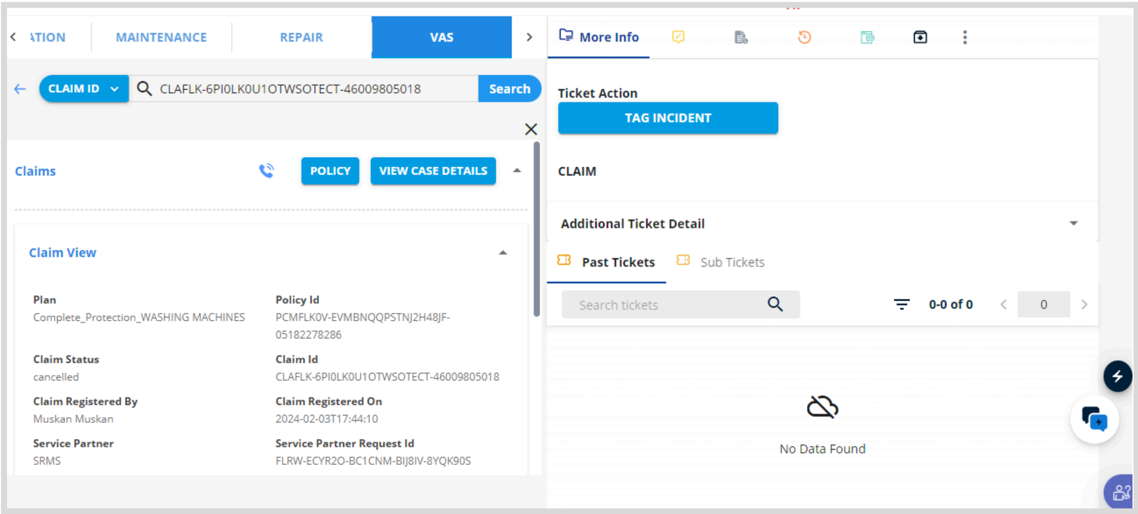


- **<u>Cancel Replacement</u>**
  This functionality enables the agents to take Cancel Replacement action from the application based on the claim status. Upon clicking the "Cancel Replacement" button, a pop-up appears on the screen and agents need to provide the necessary information requested and click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



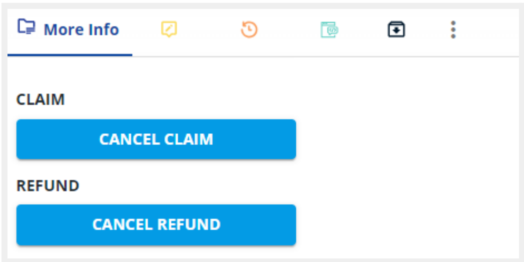


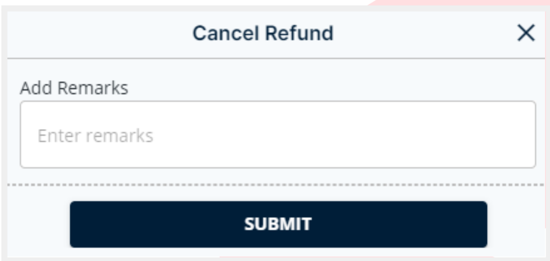
After completing the above action, the pop-up closes and the user will be on the same claim detailed view itself.



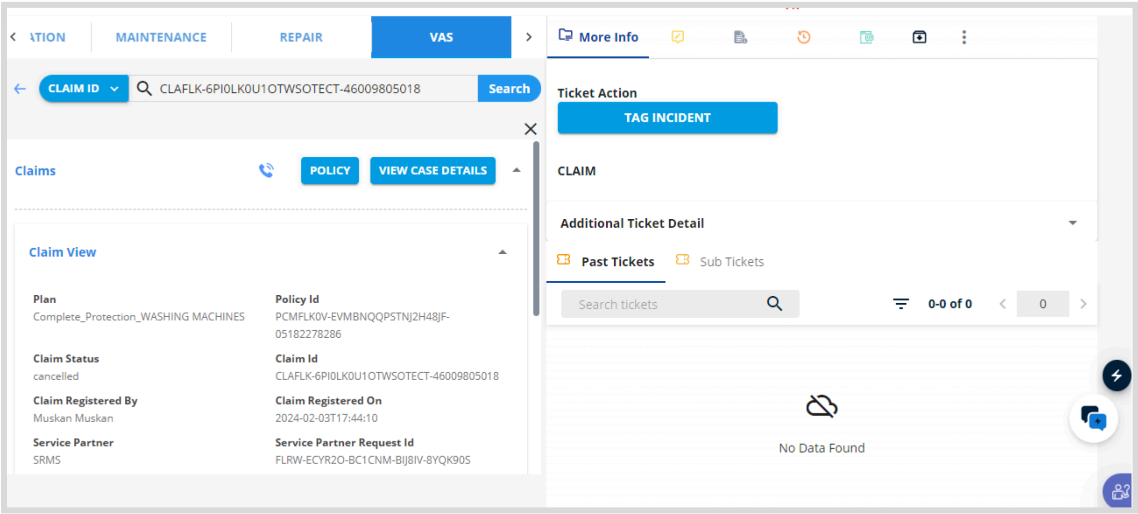
- **<u>Cancel Refund</u>**

  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.





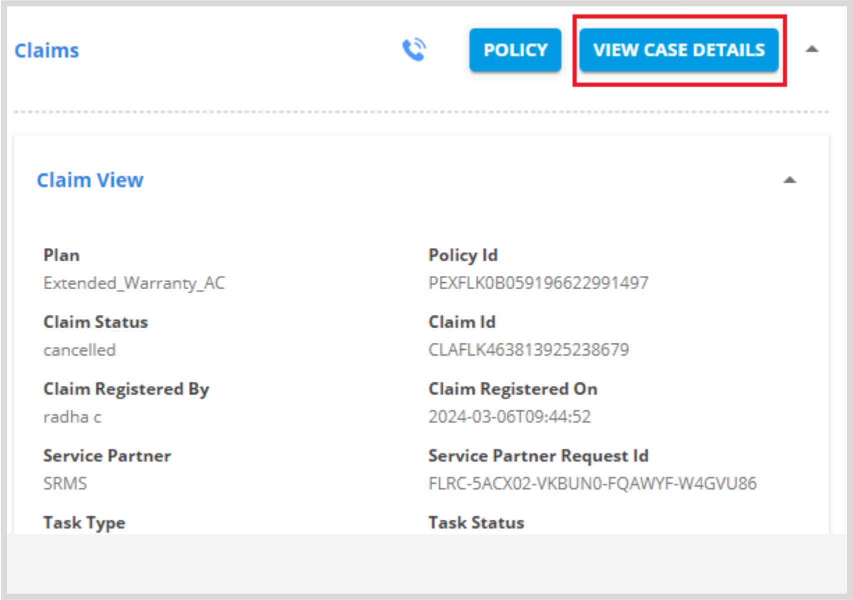
After completing the above action, the pop-up closes and the user will be on the same claim detailed view itself.



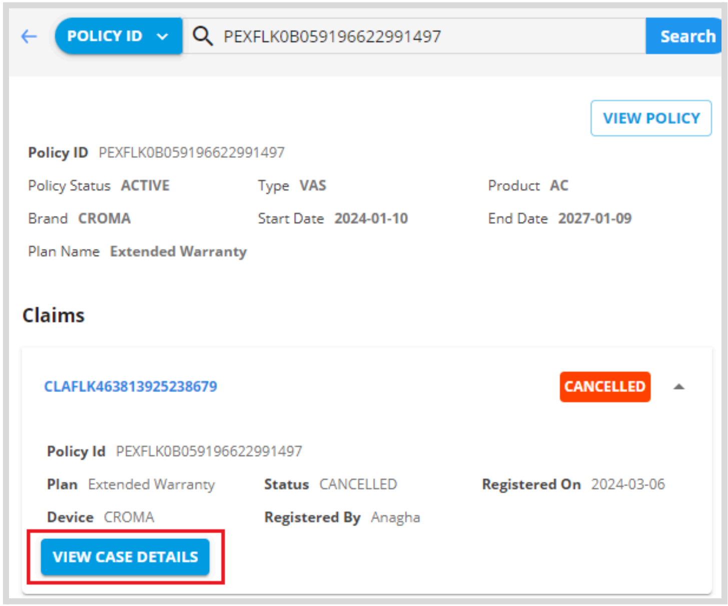
8. SRMS Case Details

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

1. 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.



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.

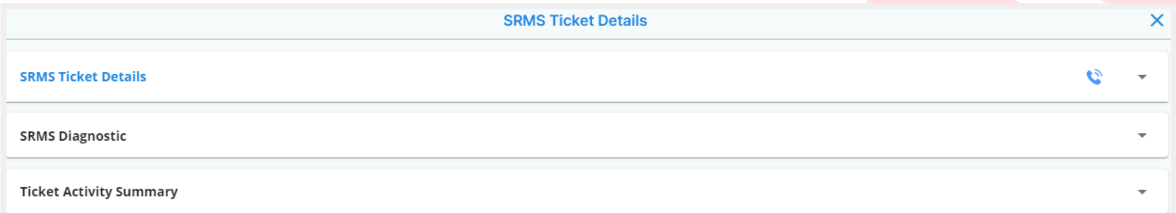


Figure: View Case Details_SRMS

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

SRMS Ticket Details: 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.*

Figure: SRMS Ticket Details

<u>SRMS Ticket Activity</u>: 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.

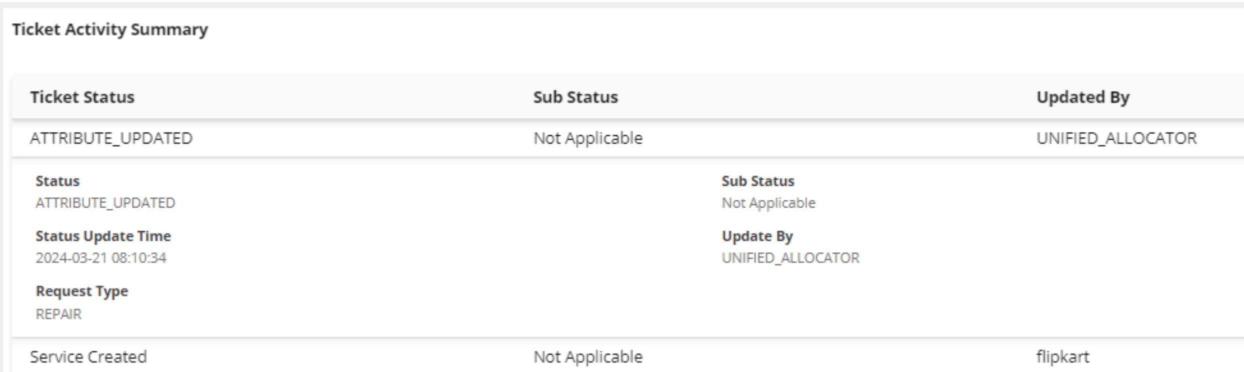


Figure: SRMS Ticket Activity

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

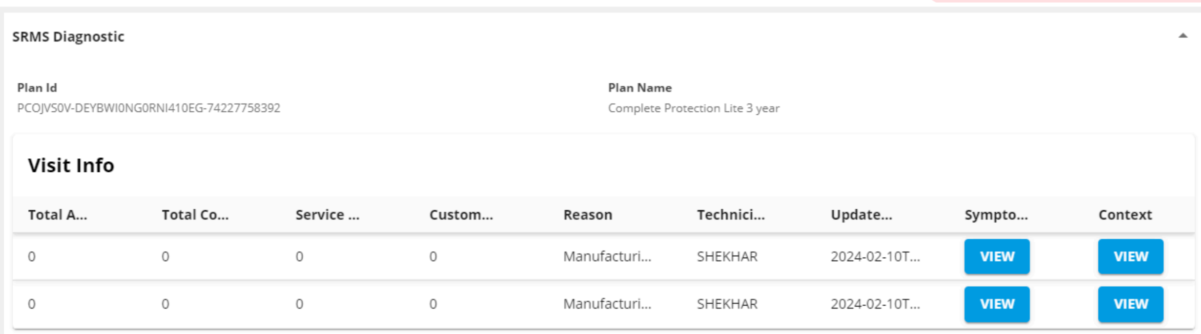
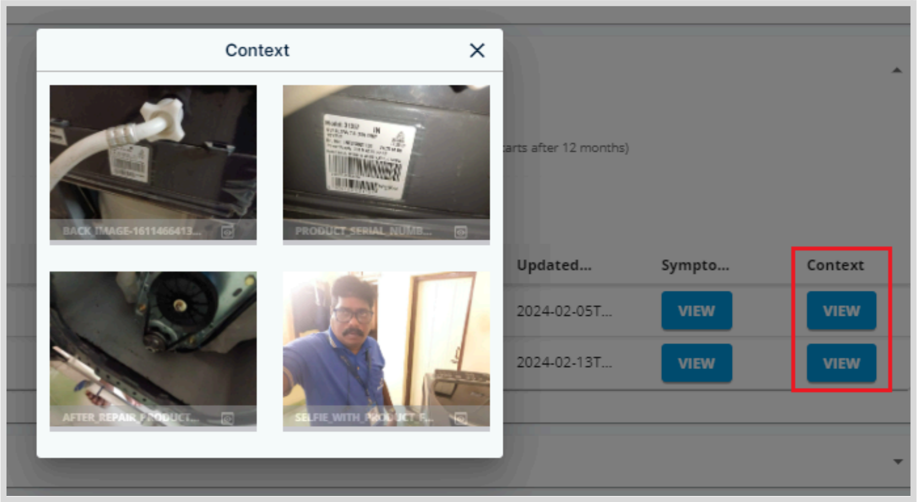
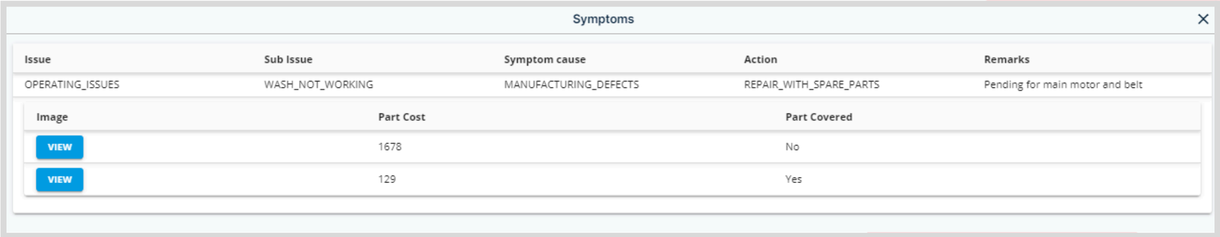


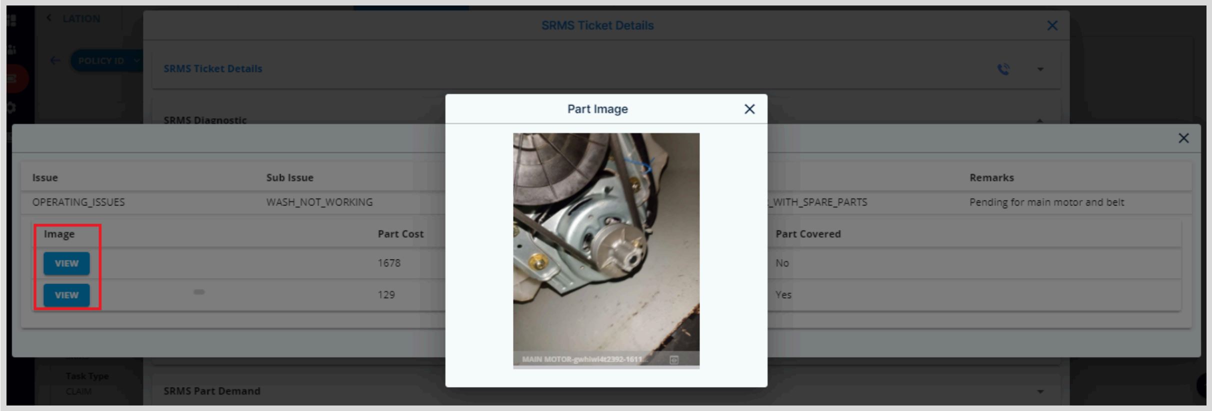
Figure: SRMS Diagnostic Information

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

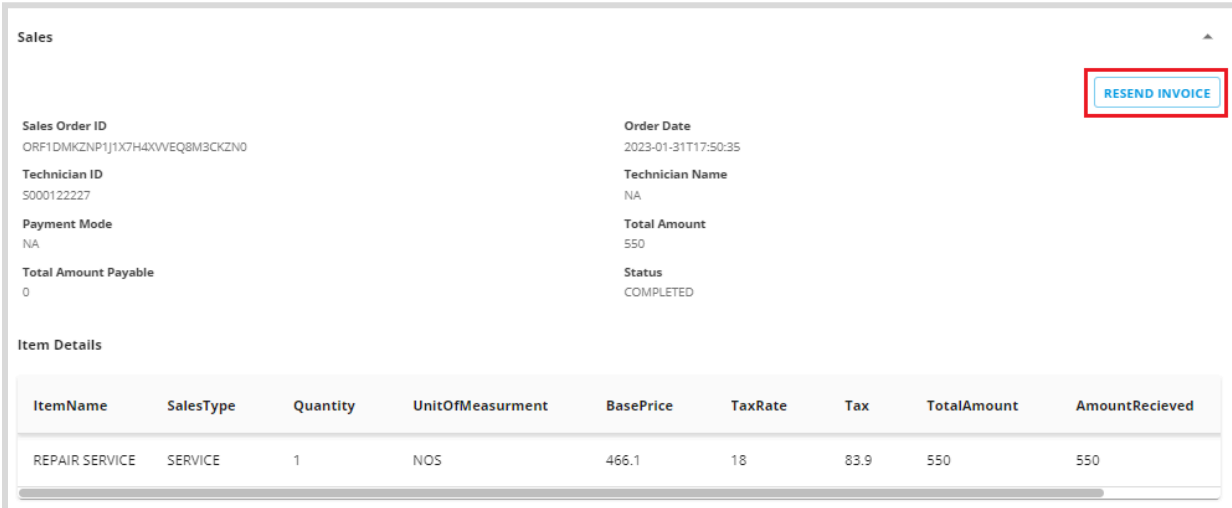


Additionally, agents can also see the Symptoms for the particular visit by clicking on the **View** button under Symptoms while any associated images with respect to the parts can be viewed by clicking on the View button in that part row.





SRMS Sales: 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.



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

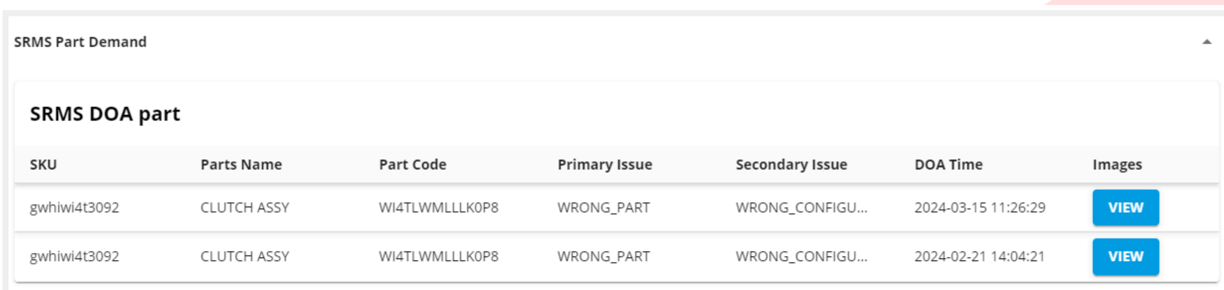
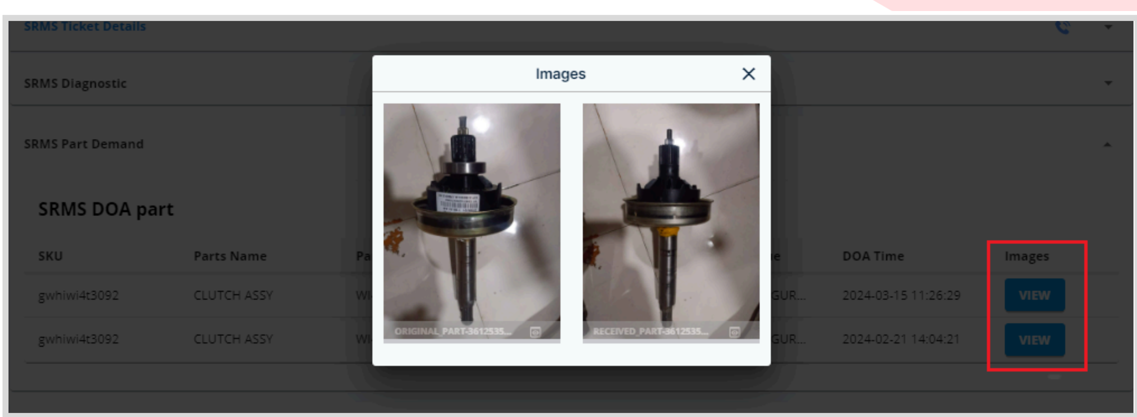


Figure: SRMS Part Demand

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
Policy	Enquiry	Resolved	Disposed Promptly in the name of L1 agent
	Request	Resolved	Disposed Promptly in the name of L1 agent
	Complaint	Unresolved	Assigned to L2 VAS Queue
Claim	Enquiry	Resolved	Disposed Promptly in the name of L1 agent
	Request	Resolved	Disposed Promptly in the name of L1 agent
	Complaint (*Without SRMS case ID*)	Unresolved	Assigned to L2 VAS Queue
	Complaint (*With SRMS case ID but no SRMS incident folder*)	Unresolved	Assigned to L2 VAS Queue
	Complaint (*With SRMS case*)	Unresolved	Moved to Pending Queue for 48 hours

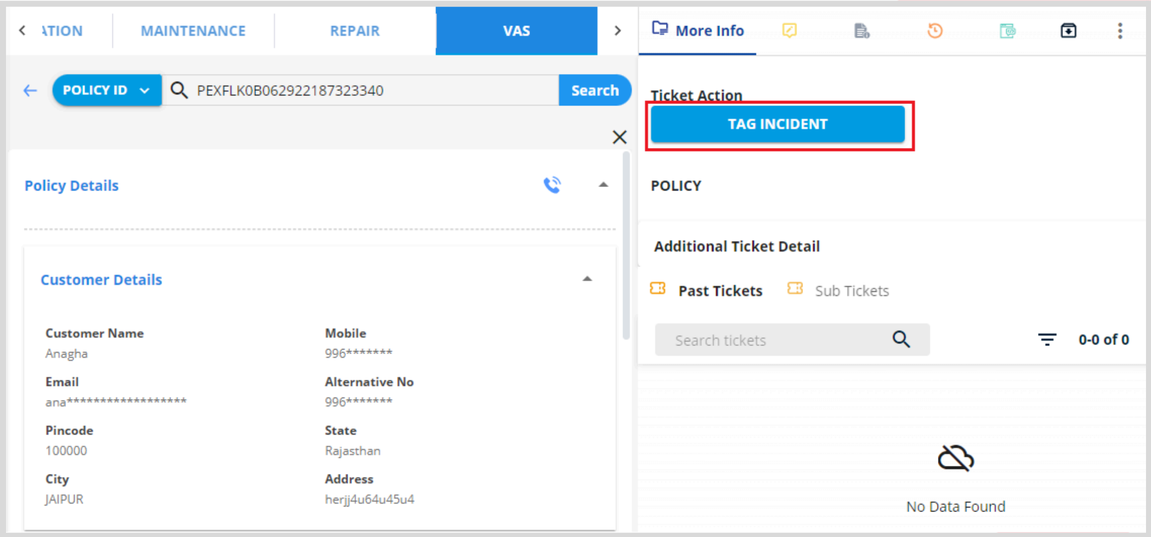
- ★ If the agent tags the incident to the subfolders **"Enquiry"** and **"Request,"** the tickets will be disposed of promptly whether it's done from Policy Level or Claim Level
- ★ If the agent tags the incident to the **"Complaint"** subfolder,
  - In case of Policy Level tagging, the ticket will remain **"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.**

- **<u>Order Related Incident Tagging</u>**

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

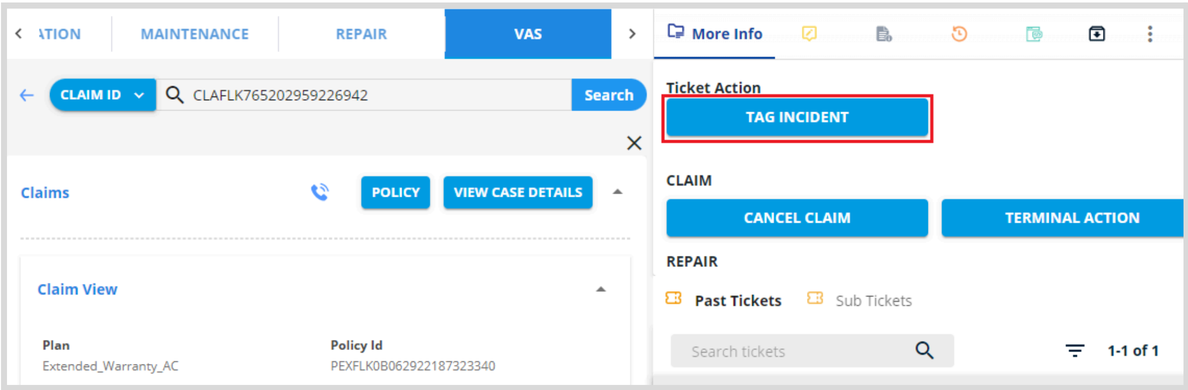
  1. <u>Policy Level</u>: For any customer query on Policy or if a customer doesn't have any active claim but is having a registered policy, agents can use the Tag Incident option within the Ticket Action section of <u>Policy Detailed View</u> screen for that particular policy.
     a. Agents can navigate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



  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

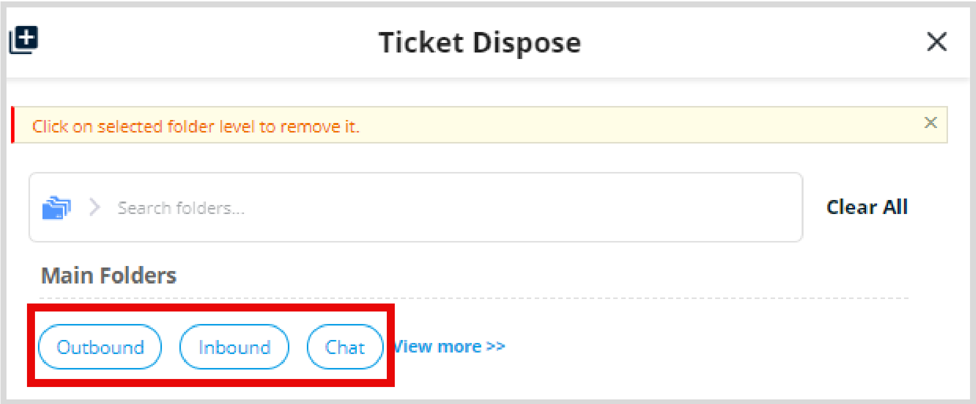
ii. Search for a Policy, phone, email > 'Claim ID' link (*if claim is present*) > Claim Detailed View

iii. 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

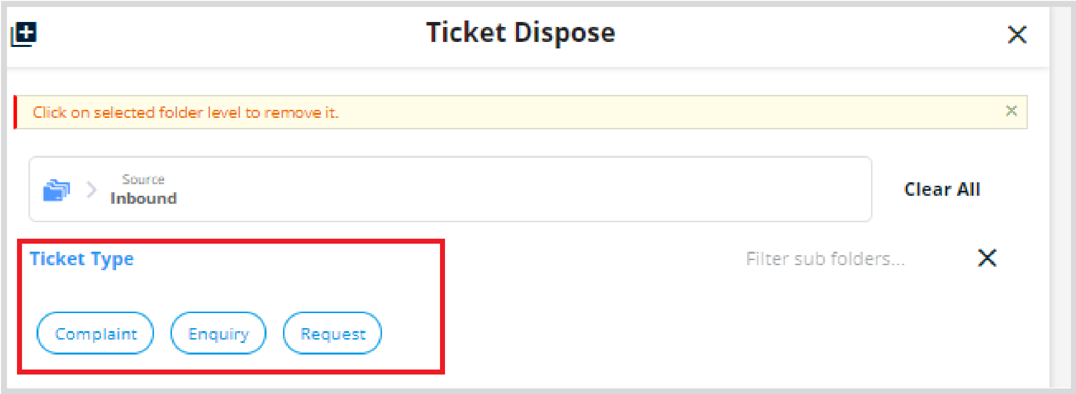


Upon clicking the **Tag Incident** Button, a pop-up opens on the screen to input details for incident tagging.

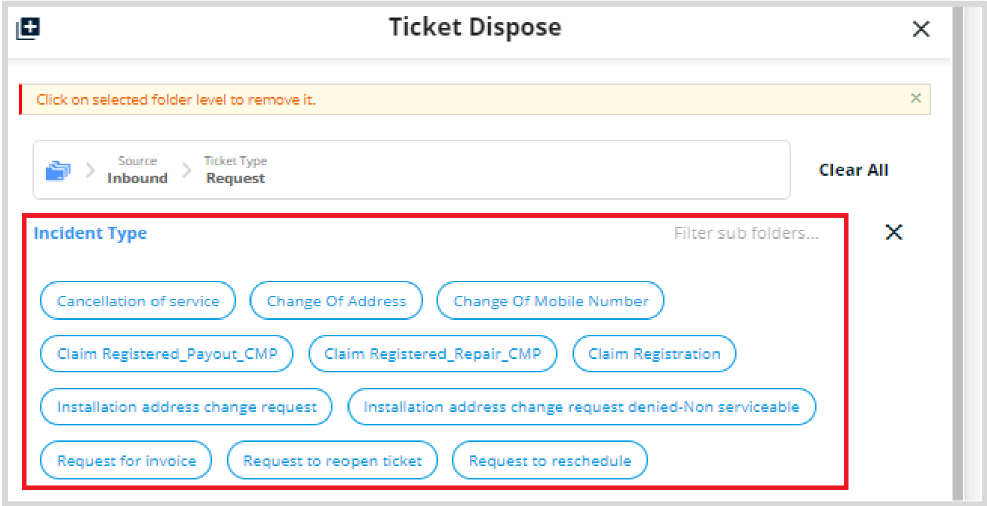
- Based on the query from the Customer, the Agent will tag the incident into respective first level folders like **Chat, Outbound** and **Inbound**.



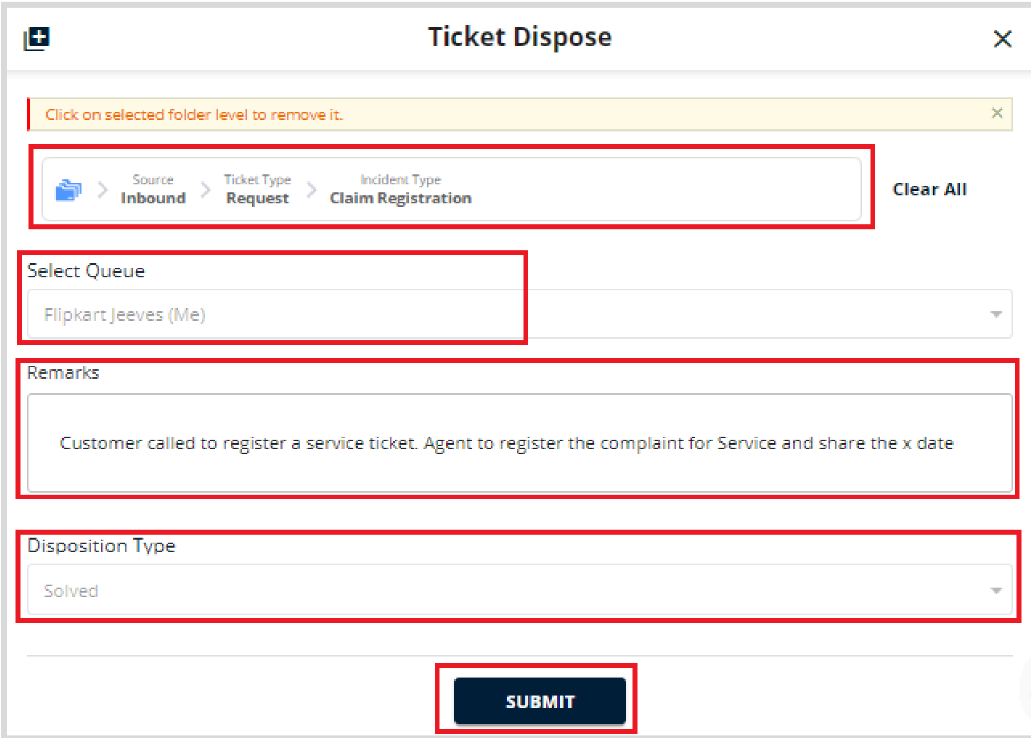
- These **main folders** contain sub-folders, specifically **Complaint, Enquiry, and Request**. Agent needs to select one of the three sub-folders.



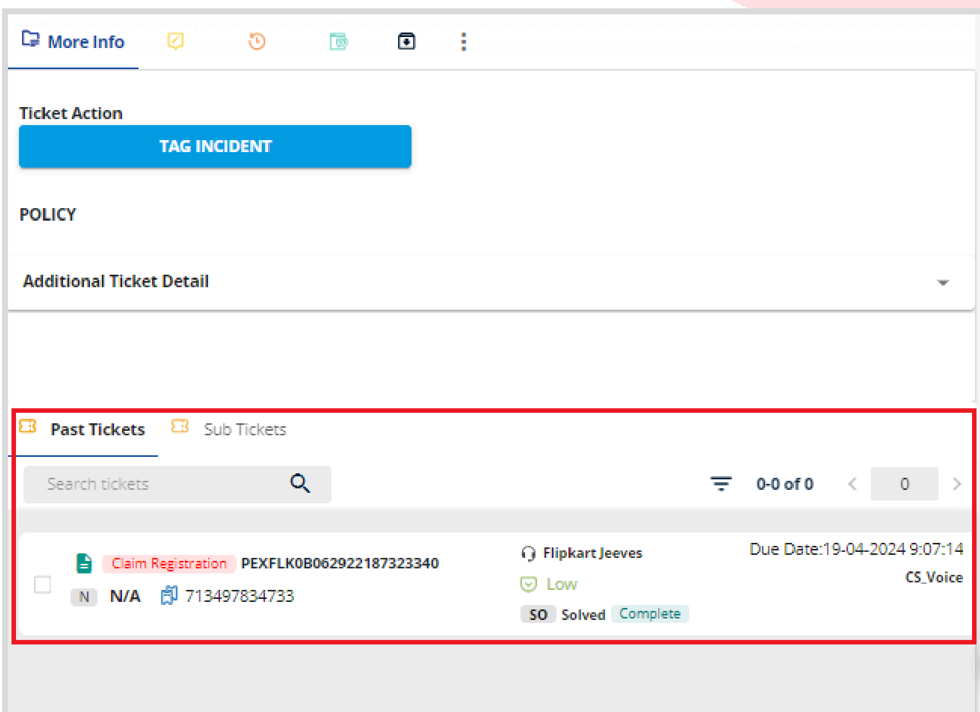
- Further, the agent needs to select a specific issue/query related folder from the list available.



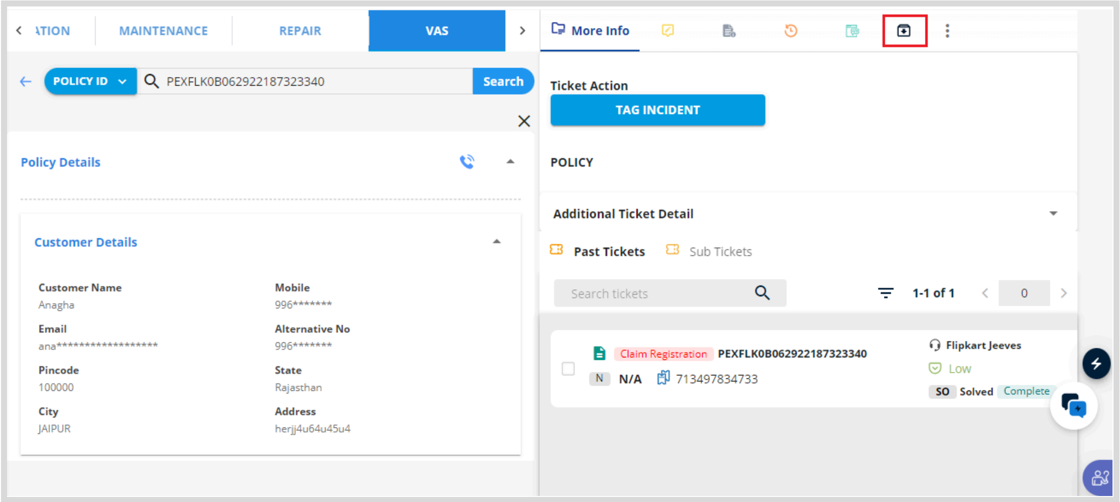
- Upon selecting specific folders, the **"Remarks"** field will auto-populate based on the configured notes for the folder while <u>agents can update the remarks</u> as needed based on the customer query. Also, both the **"Queue"** and **"Disposition Type"** will be automatically chosen and rendered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



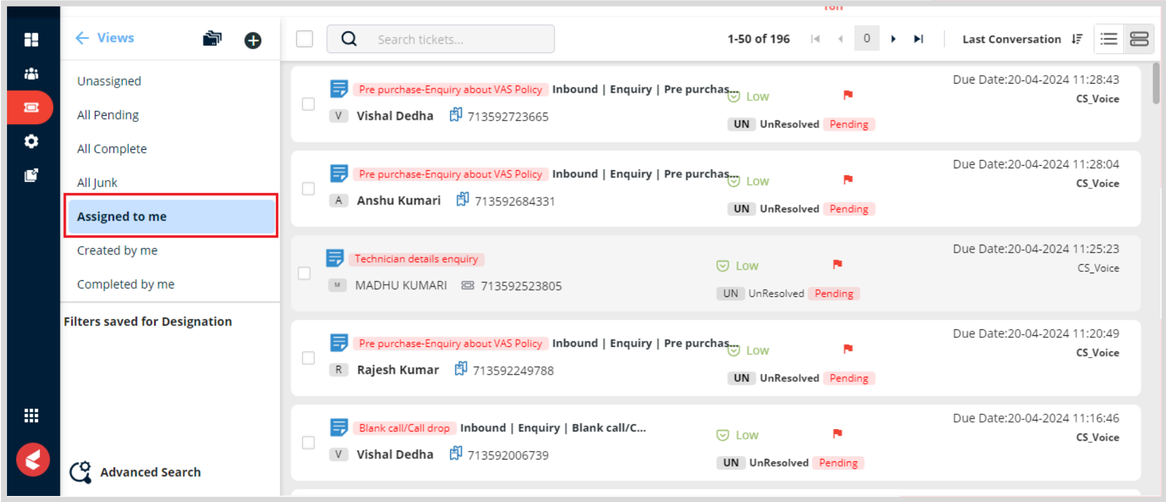
On completing the incident Tagging process as per above, an internal ticket will be created in Kapture for the Policy and it will be visible in the **Past Ticket** section as shown below.



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

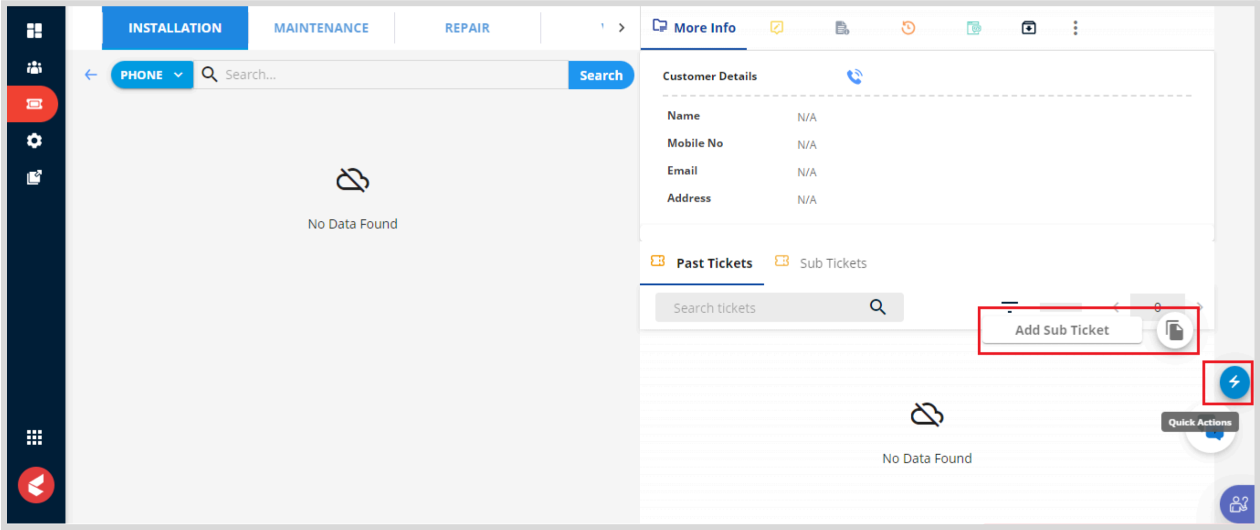


Once the ticket has been disposed of as mentioned above, agents will be redirected to the Ticket listing page 'Assigned to Me' section with a list of tickets assigned to the agent.



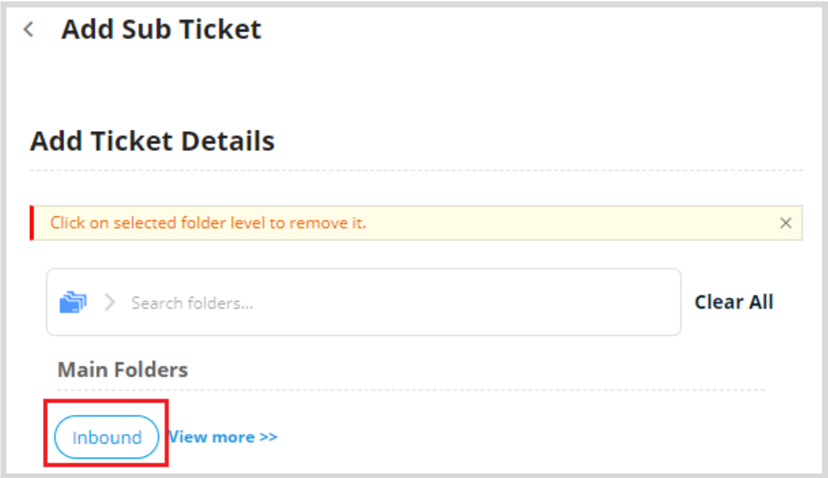
- **Non–Order Related Incident Tagging**

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

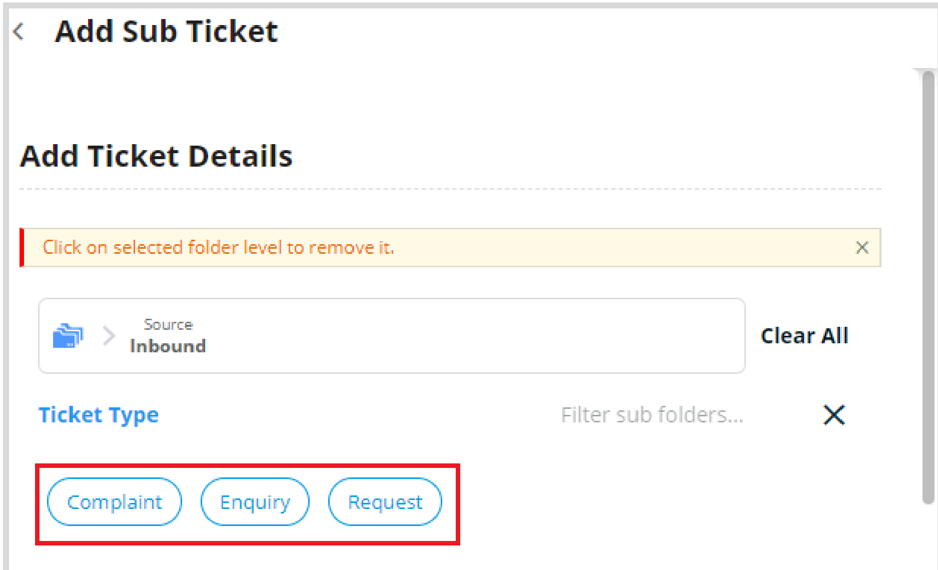


Upon clicking the **Add Sub Ticket** button, a pop-up opens on the screen to input details for tagging the incident.

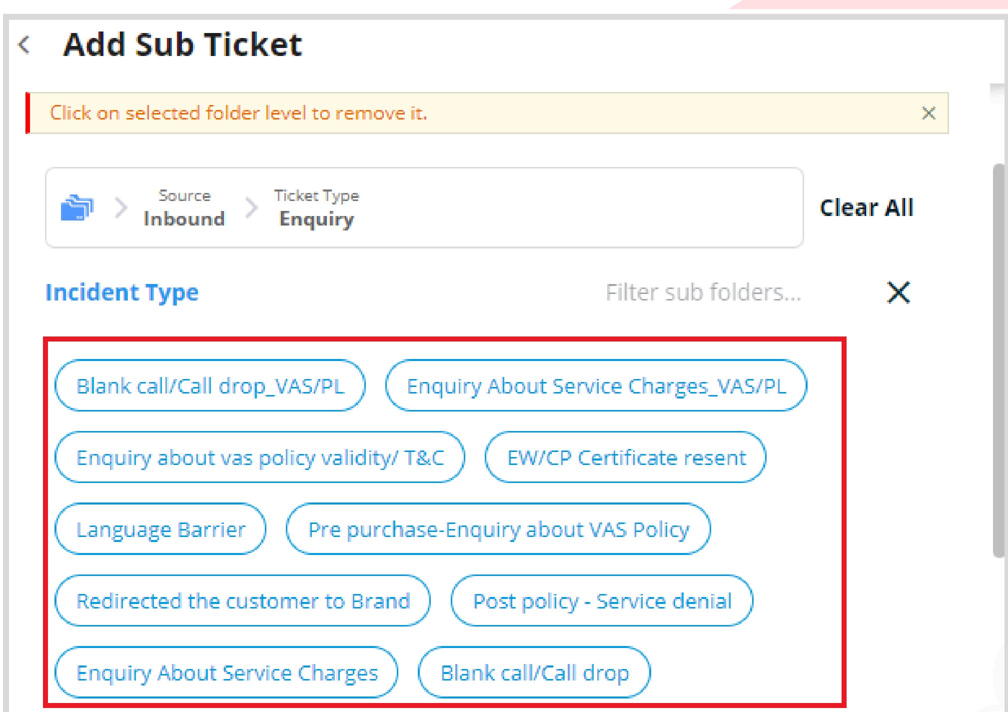
- Based on the query from the Customer, the Agent will tag the incident into first level folder as **Inbound**.



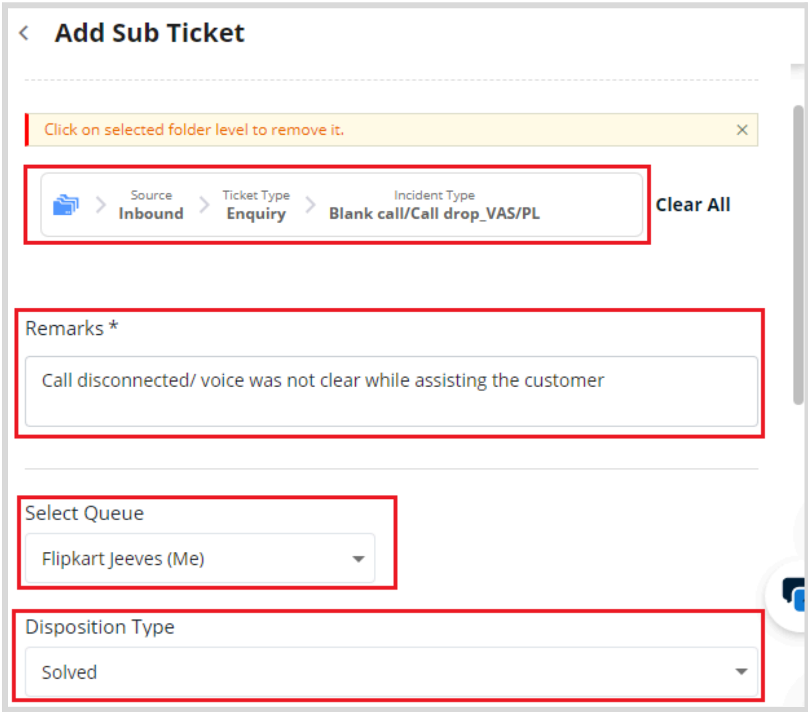
- This **main folder** contains subfolders, specifically **Complaint, Enquiry, and Request**. Agent needs to select one of the three sub-folders.



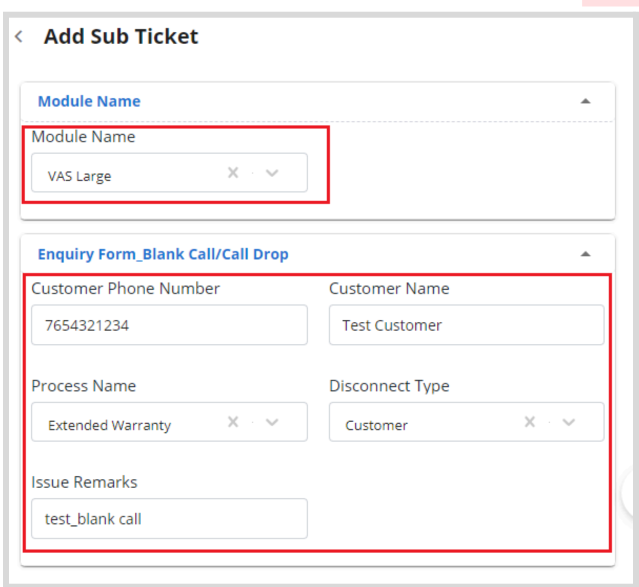
- Further, the agent needs to select a specific issue/query related folder from the list available.



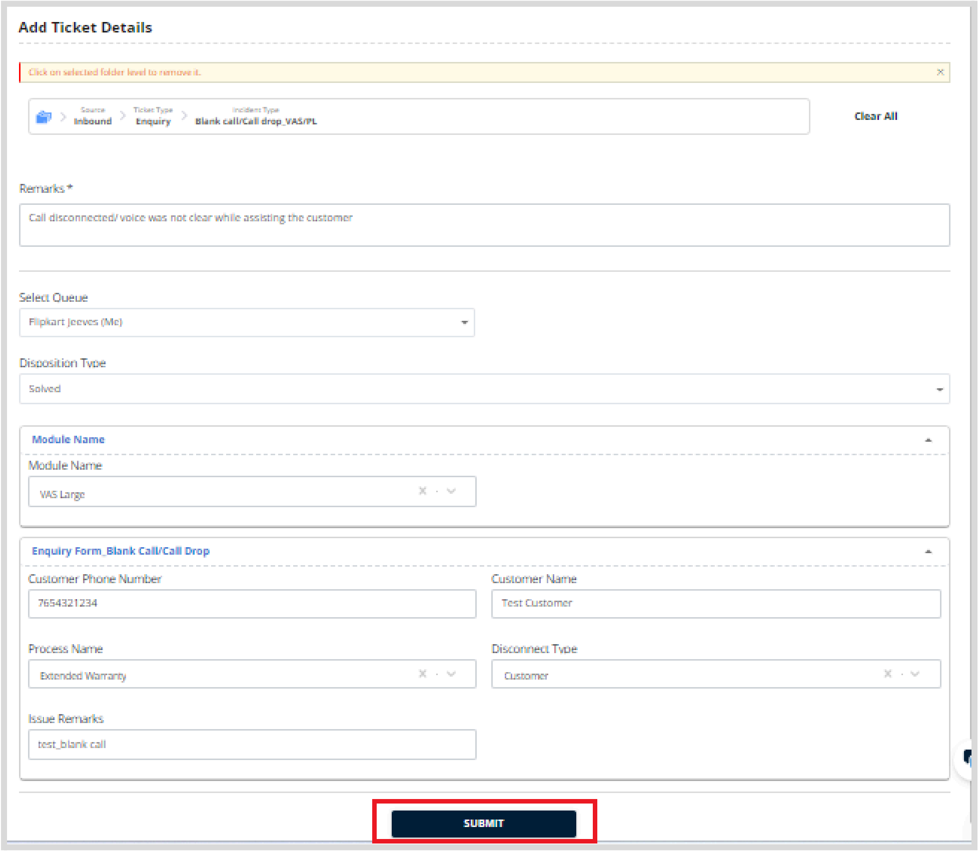
- Upon selecting specific folders, the **"Remarks"** field will auto-populate based on the configured notes for the folder while agents can update the remarks as needed based on the customer query. Also, both the **"Queue"** and **"Disposition Type"** will be automatically chosen and rendered **non-editable**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



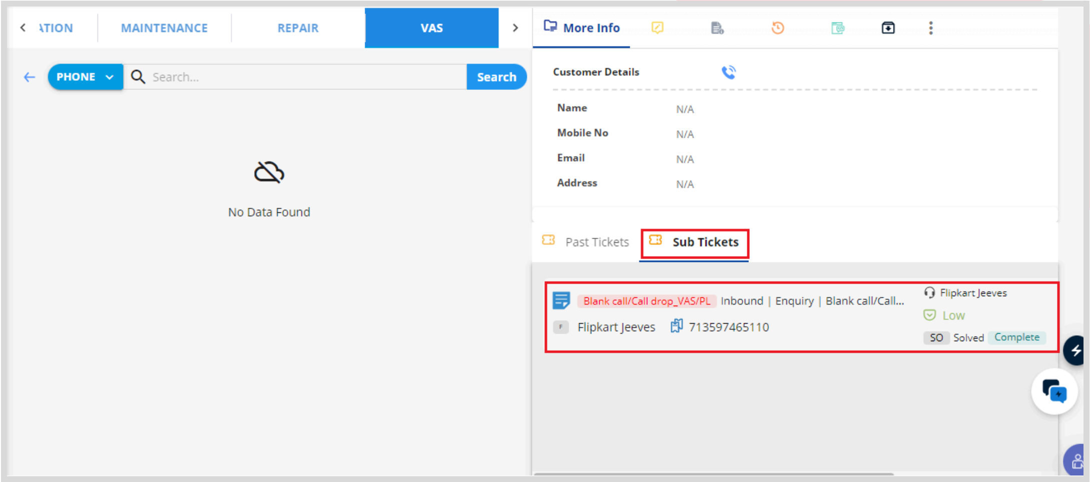
- Post this agent needs to Select **Module Name** from the available list as well as provide details for the **Enquiry Form** based on the customer interaction.



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



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.



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**

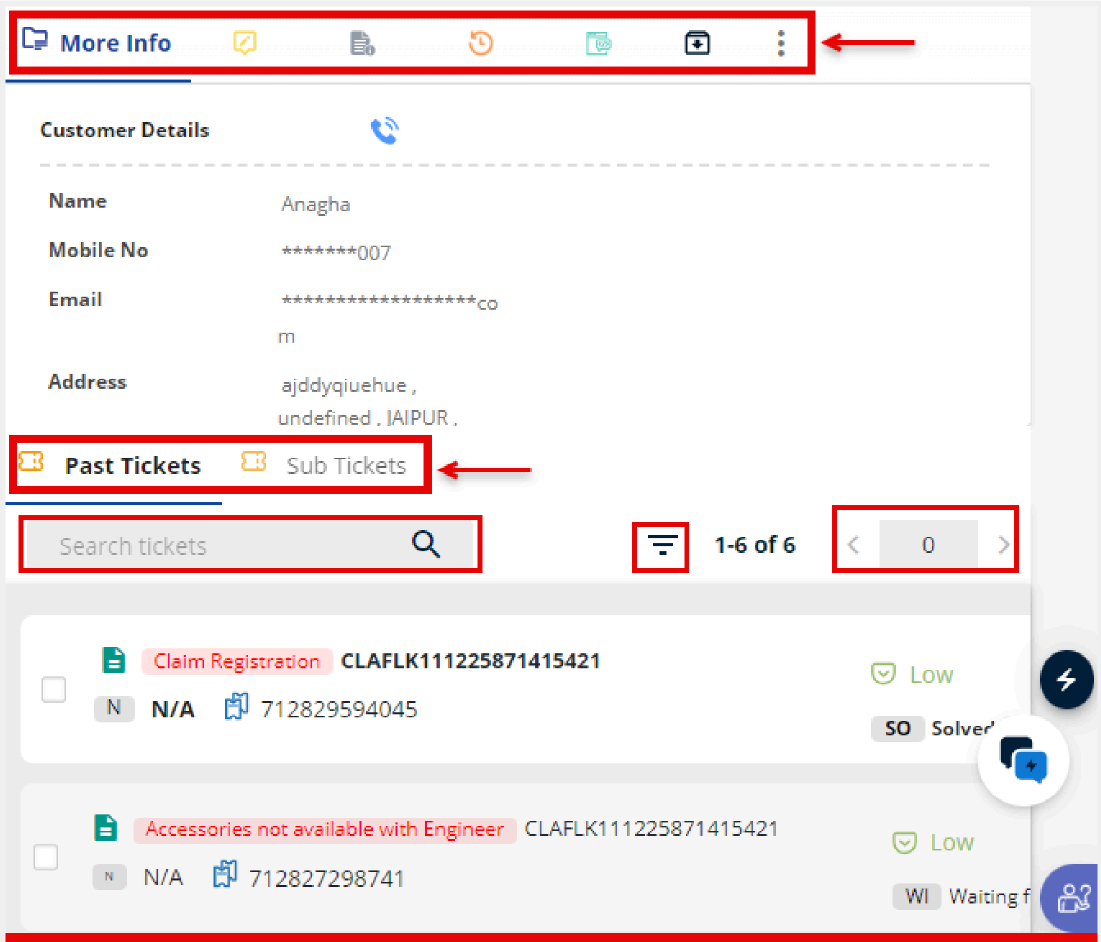
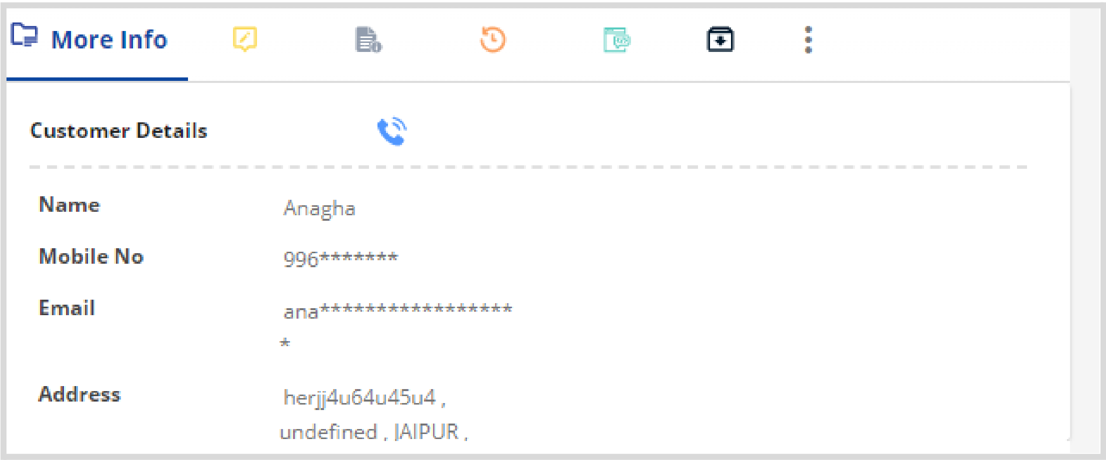


Figure: Options on the Right side of Ticket Page

More Info

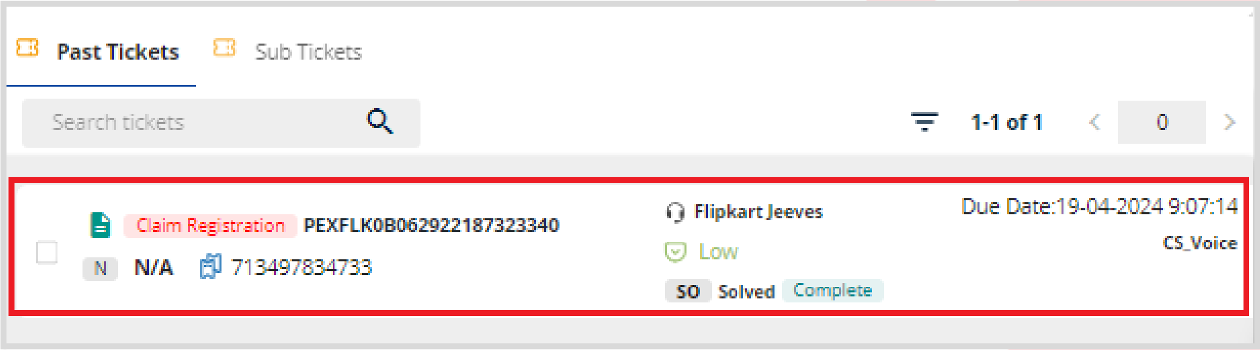
As implied by its name, the **Customer Details** tab provides information pertaining to the customer, including their **Name, Mobile Number, Email, Address, and SLA Status.**



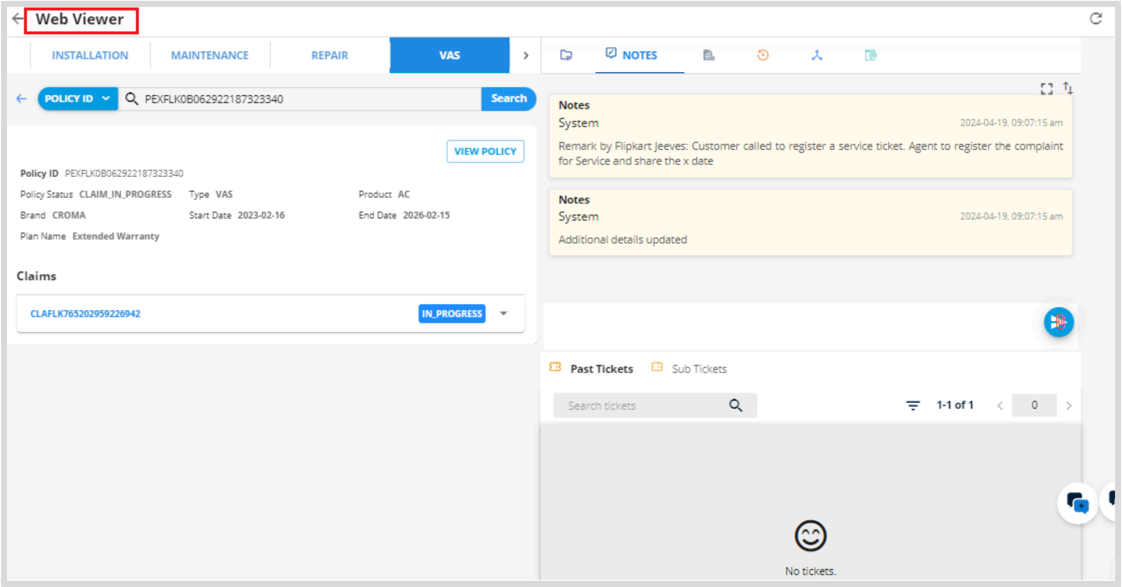
Past Tickets

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.**



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.



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.

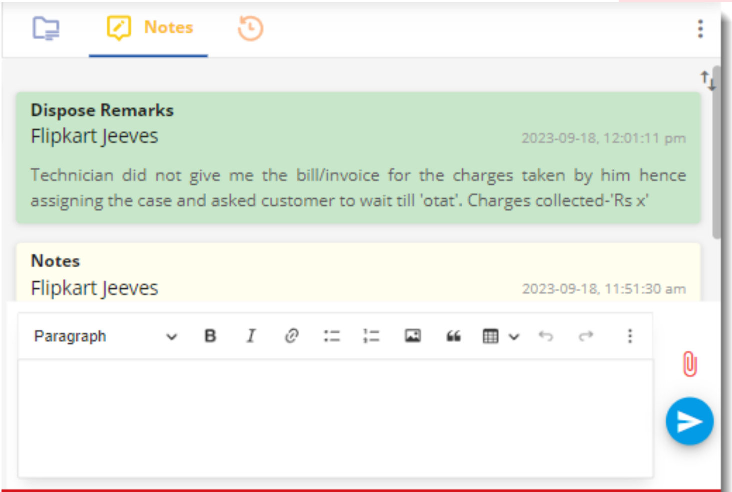


Figure: Notes