FLIPKART VAS CHATBOT USER MANUAL - AGENT

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.

Ticket Allocation (Taggings and Queue details)

- All the Enquiry and Request-related tickets will be treated as “0CR” and will be assigned to the “VAS_closed_queue” queue and tagged in the “Enquiry” or “Request” folder as per the defined matrix.
- All the Complaints, API Failures, Exceptions or any issue-related tickets will be treated as “1CR” and will be assigned to the “L1_VAS_CMB_Queue” & “VAS_Waiting_for_internal_update” queue and tagged in the “Complaint” folder as per the defined matrix.

Actions to be performed by the 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>

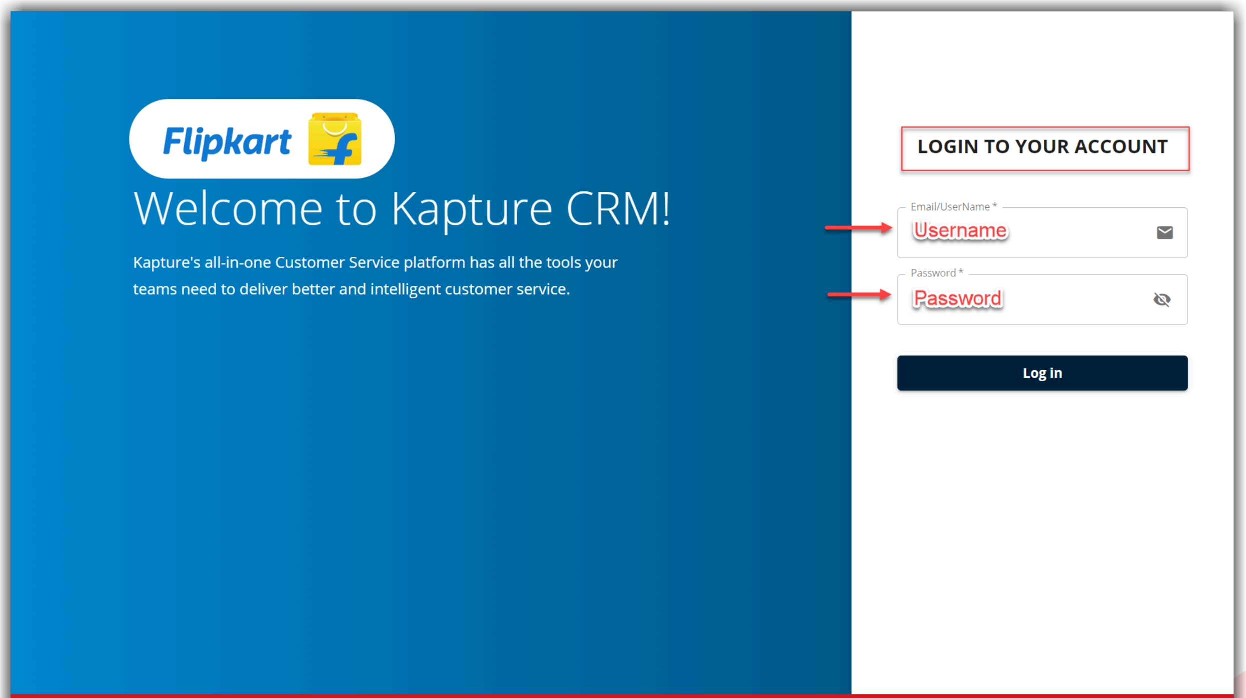


Figure: Account Login Screen

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”**.

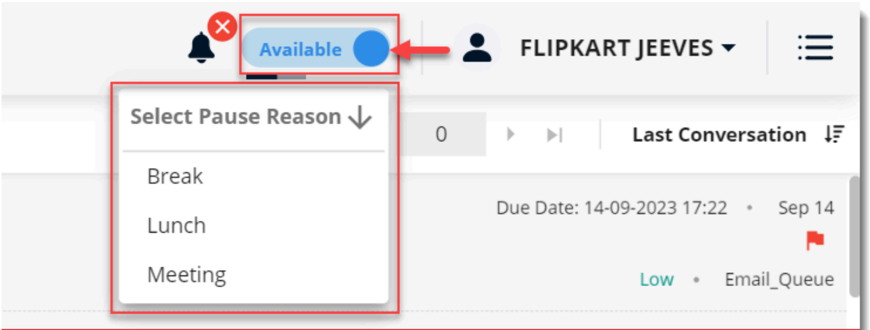


Figure: Pause Reason

- 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.

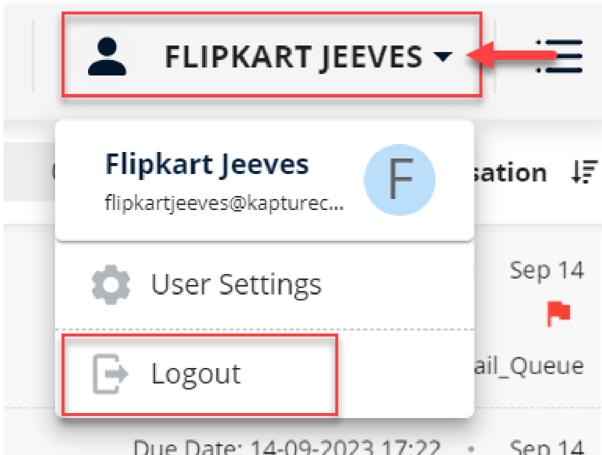


Figure: Logout Option

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.

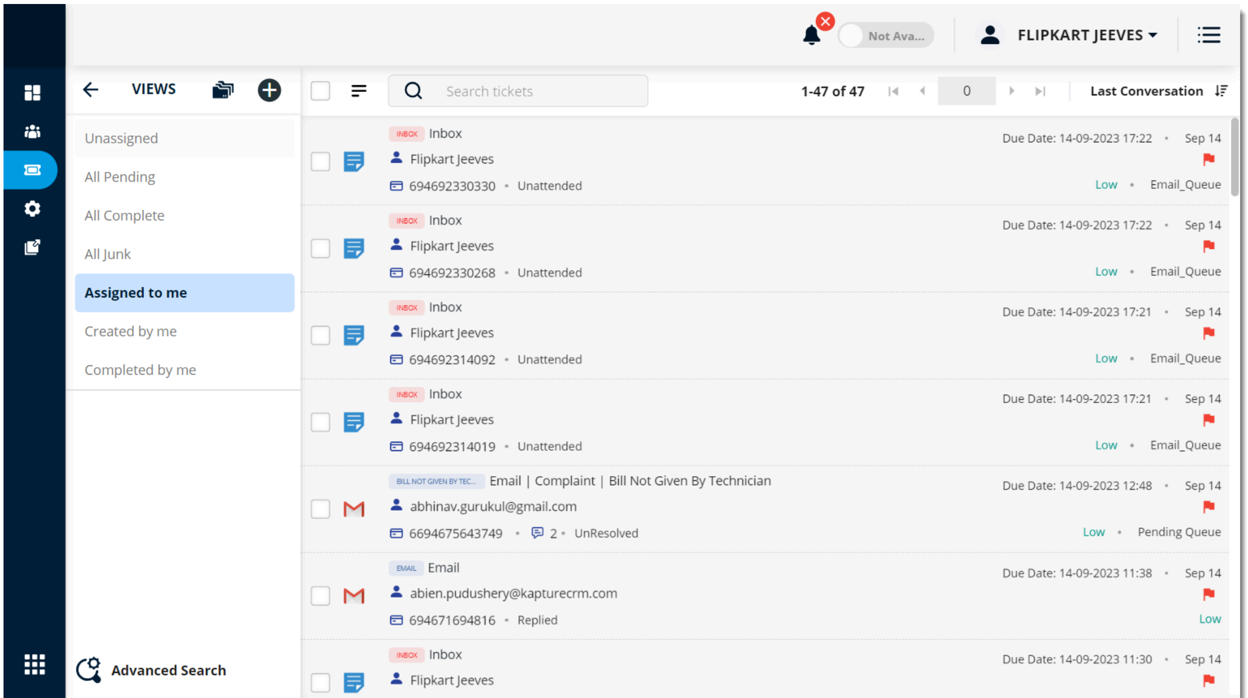
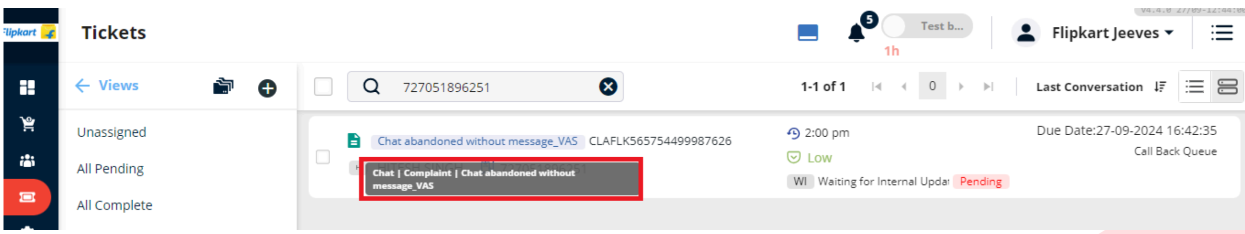


Figure: Tickets Page

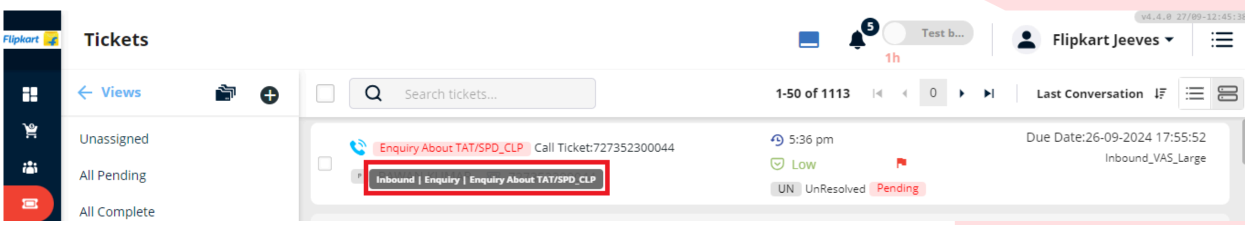
Steps to Attend the L1_CMB_VAS Tickets

- Step 1: Agent Logged in to Kapture CRM
- Step 2: Mark “Available” in Kapture CRM
- Step 3: Agents will get a CMB Call. Once a call gets connected to an agent, Incident will get assigned an agent and visible in the Assign To me Page.

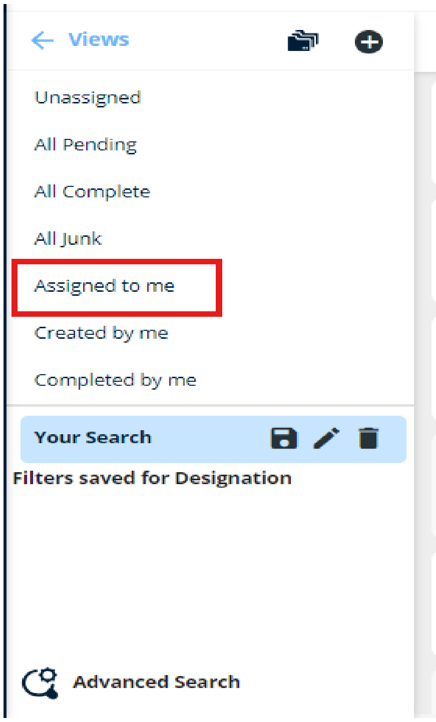
Chat ticket identifier: Agent can hover the ticket SSI to get the identifier for chat and inbound.



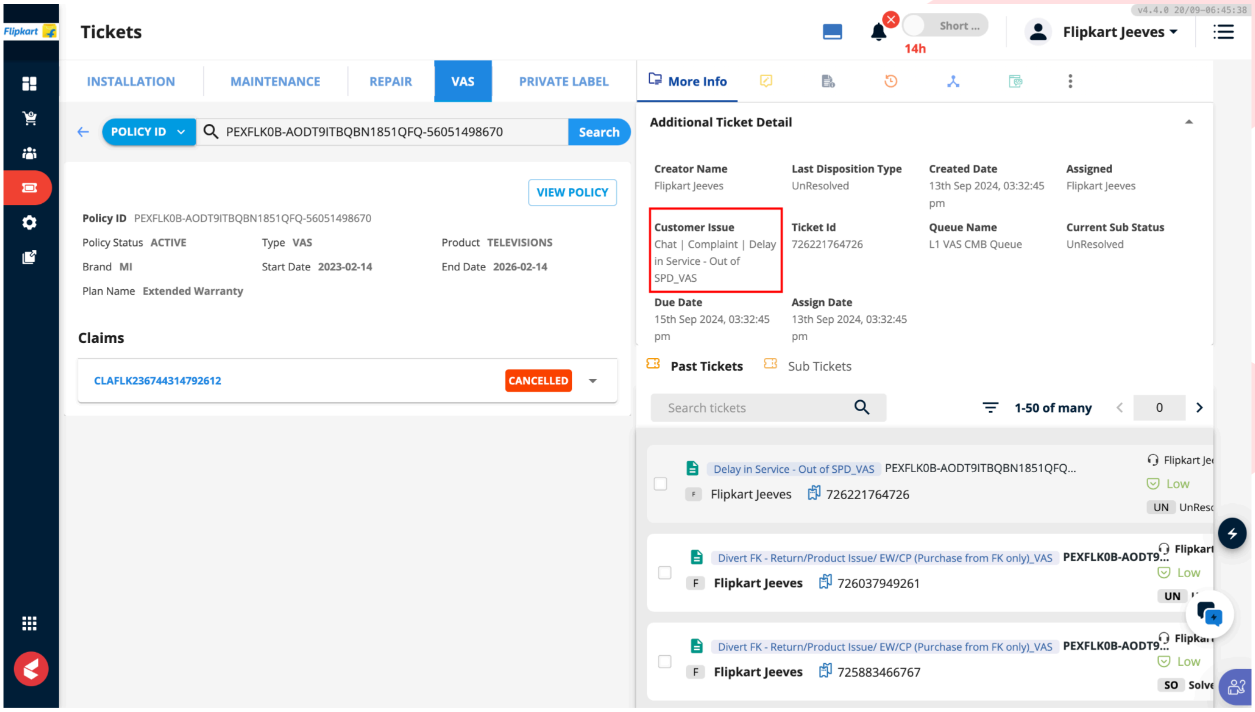
Inbound ticket identifier:

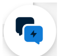


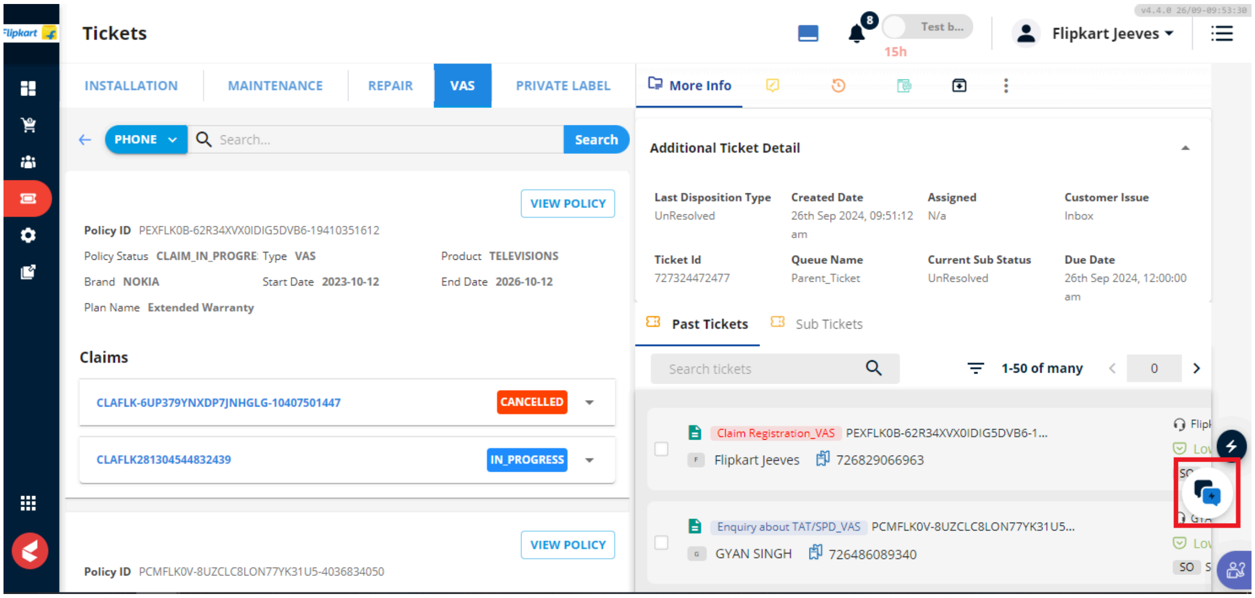
- Step 4: Tickets will get auto-assigned to the Agent available in “L1_CMB_Queue”.
- Step 5: Agent can see the ticket assigned to them in “**Assigned to Me**”.



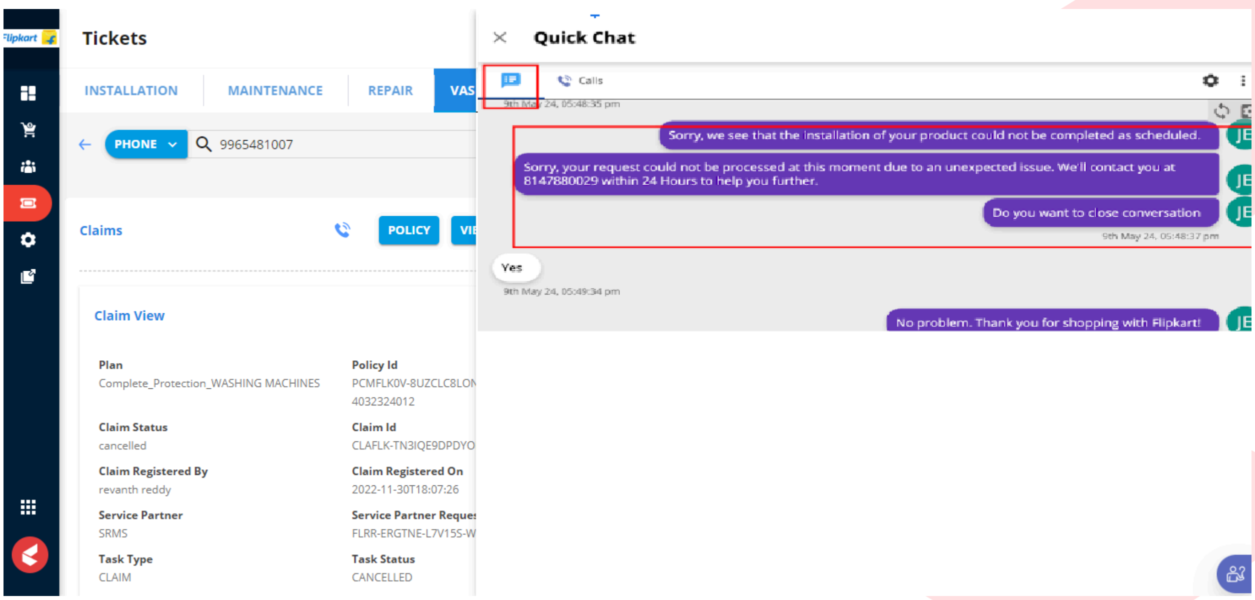
- Step 6: Agent will open the ticket to see the details.



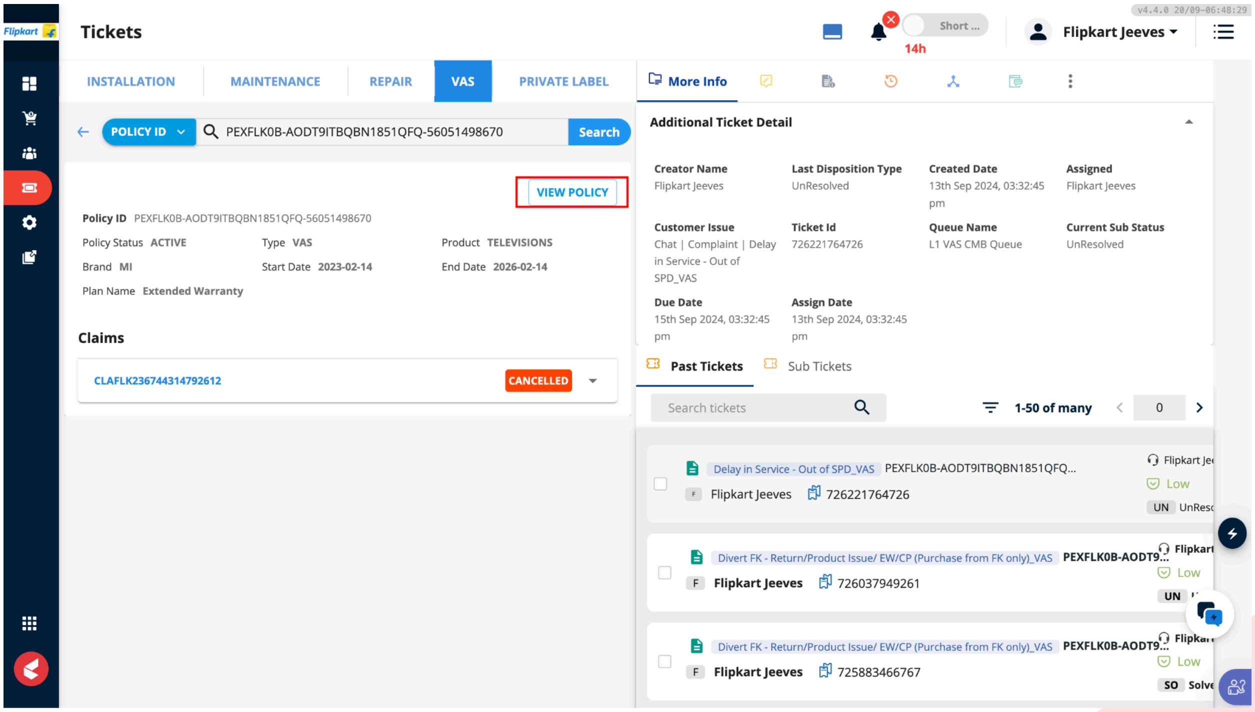
- Step 7: Agent needs to click on the “Quick Chat”  icon available at the right bottom of the screen.



- Step 8: Agent needs to click on “Parent Chat” to see the chat conversation.



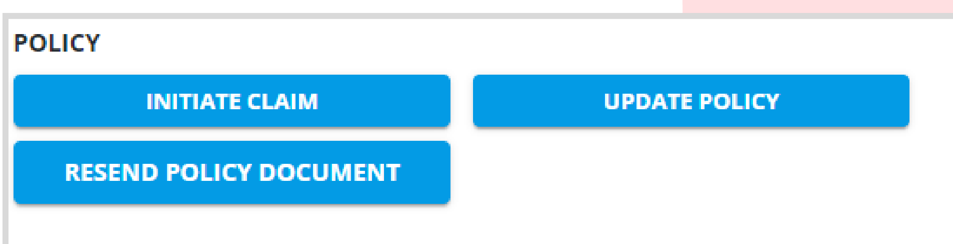
- Step 9: Once the Agent reads and understands the issue on call, the agent needs to click on View Policy.



- Step 9: Once an agent clicks on View Policy.
- **Policy Level 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 the '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.

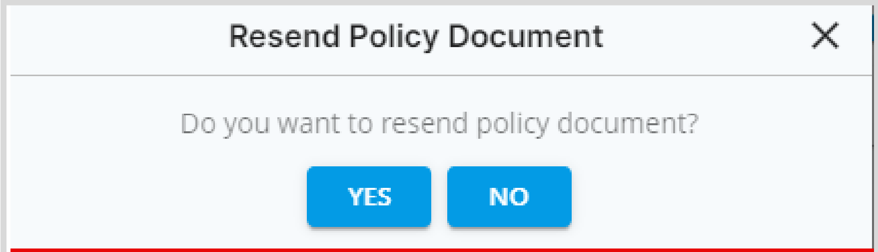
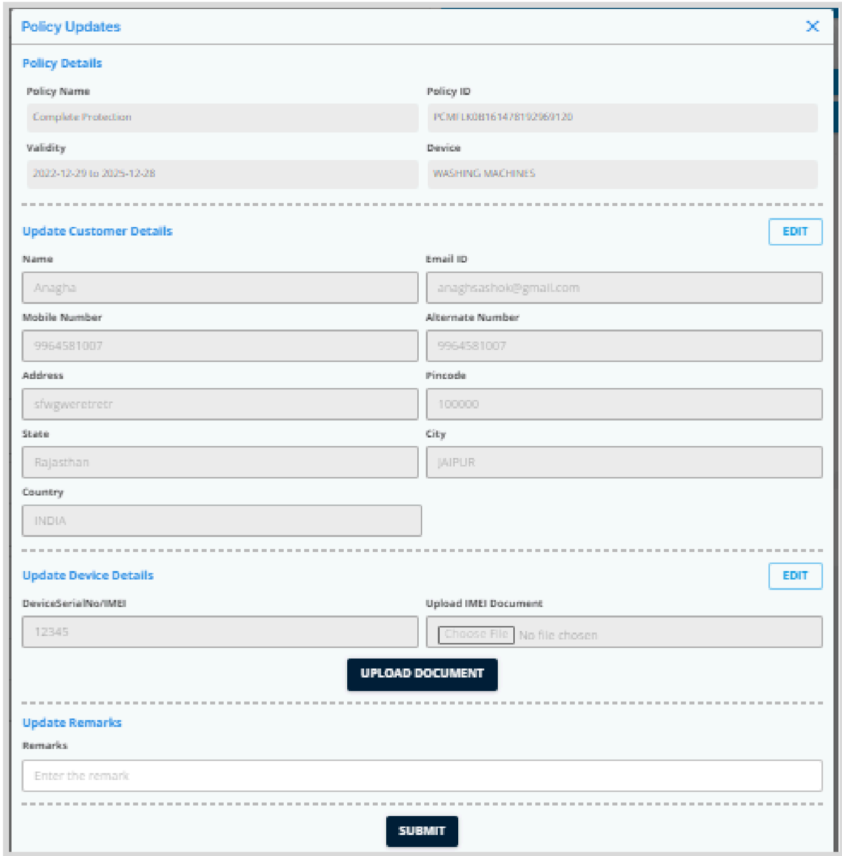


Figure: Resend Policy Document

- **<u>Update Policy</u>**

  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.



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

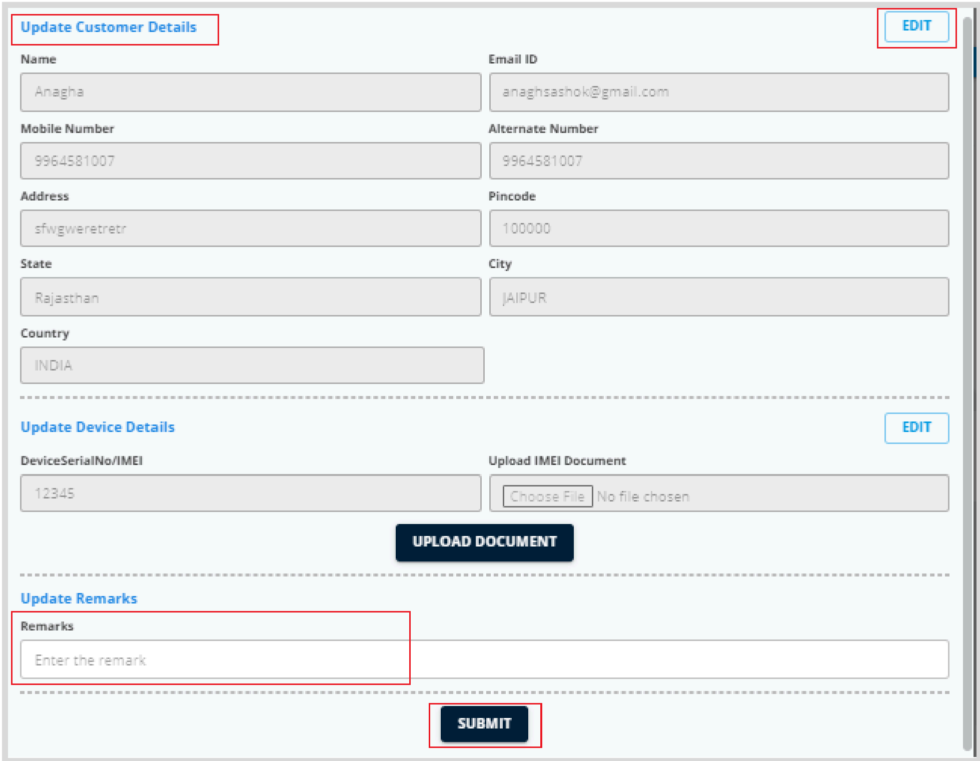
Step 1: Click on the **Edit** button to start modifying/updating the KYC details

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



Agents can use the Update Device Details section to upload the **Replacement certificate**.

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

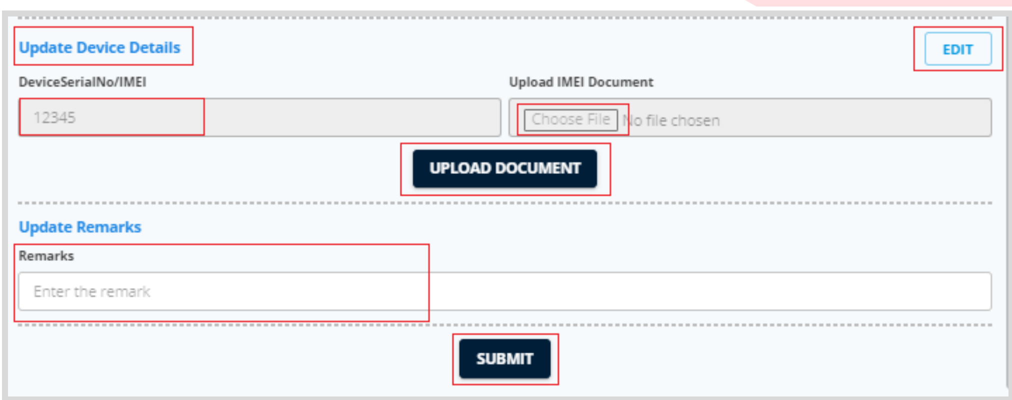
Step 2: Select the new replacement document from the agent's computer system by clicking on ‘Choose File’

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

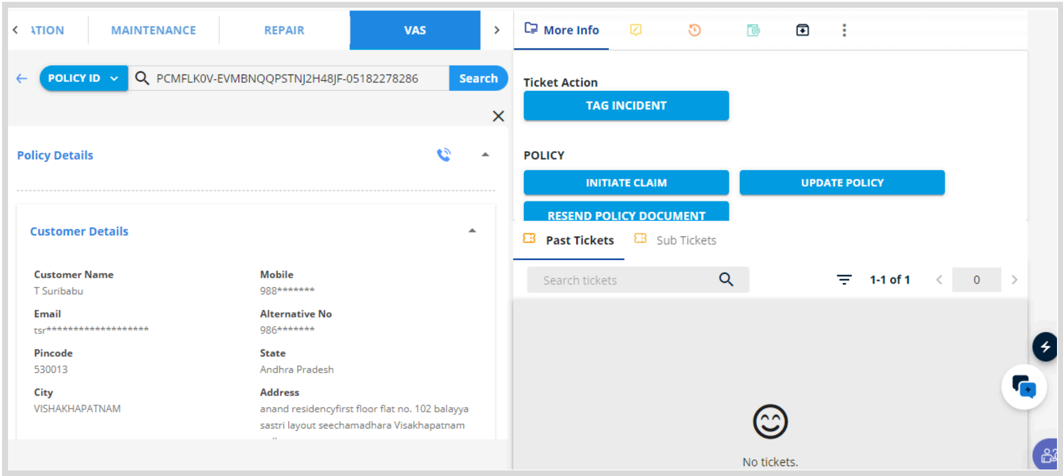
Step 4: Click on ‘**Upload Document**’ to upload the new replacement document

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

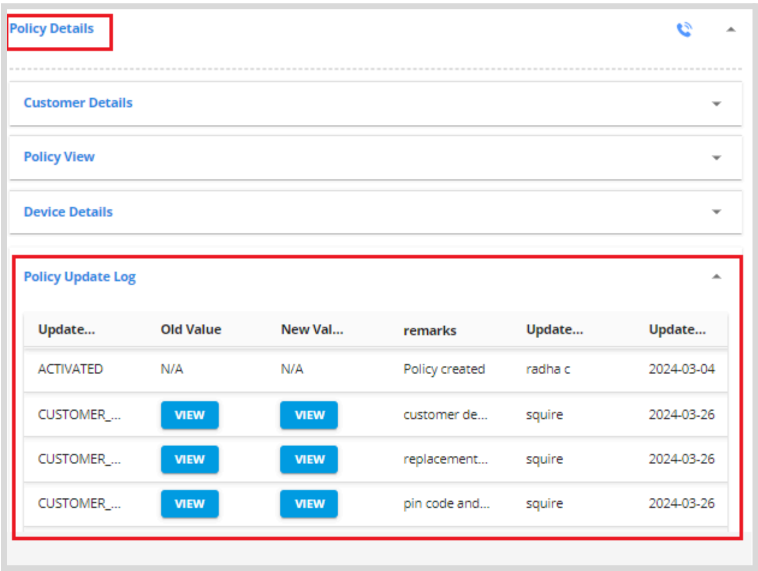
Step 6: Click on the ‘**Submit**’ button to complete the process



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.

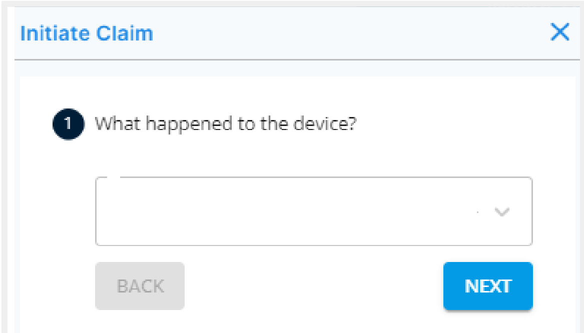
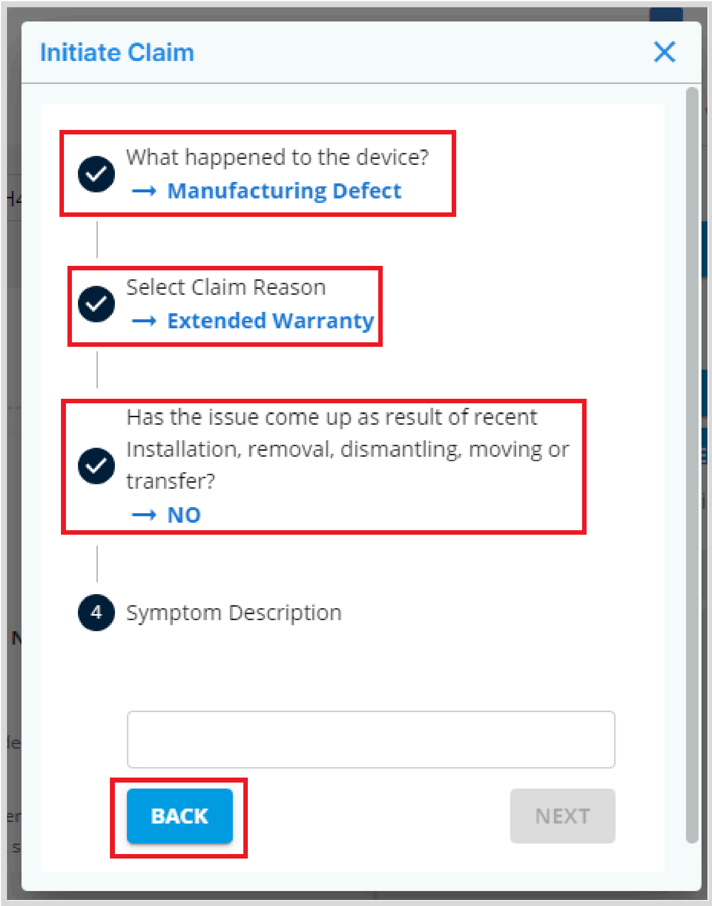


Figure: Initiate Claim

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

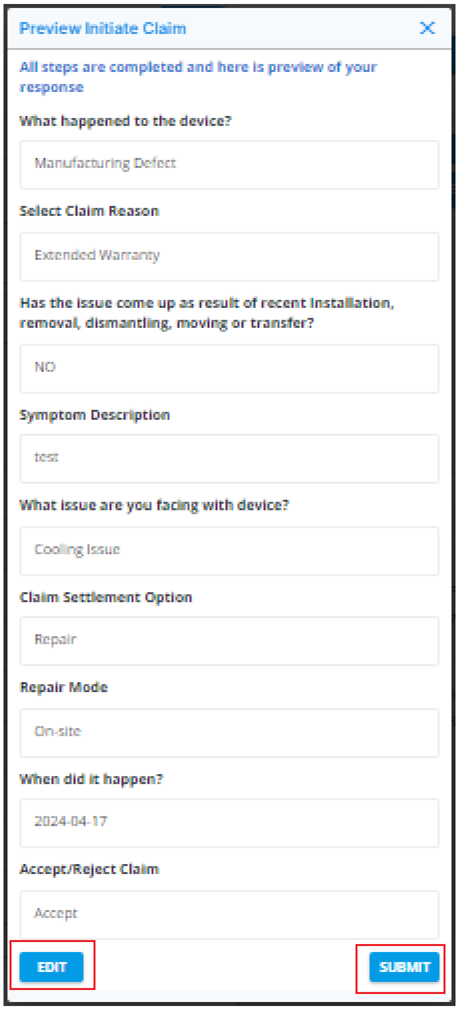
Step 2: Continue with the questionnaire until a summary screen appears. Incase, agent needs to go back and review/change the answer for any of the question(s) during this process, use the **Back** button or Click on the particular **question**



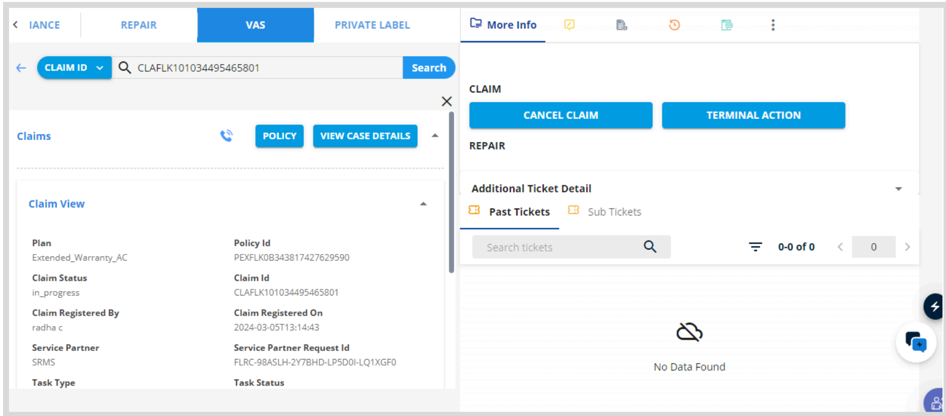
Step 3: A summary screen appears upon completing the questions, agent needs to review the answers provided for the KYI questions

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



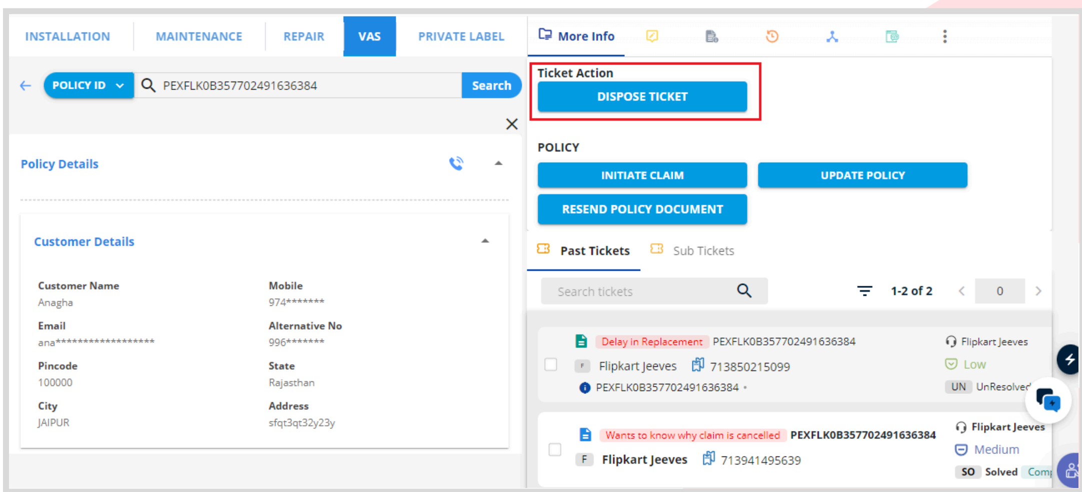
After completing the Initiate claim action, users will be redirected to the Claim Detailed view screen of the new claim which was created.



➢ Post completing the Manual call to customer and/or Policy Level Action, agent needs to <u>Dispose the existing ticket</u> using ‘**Dispose Ticket’** option

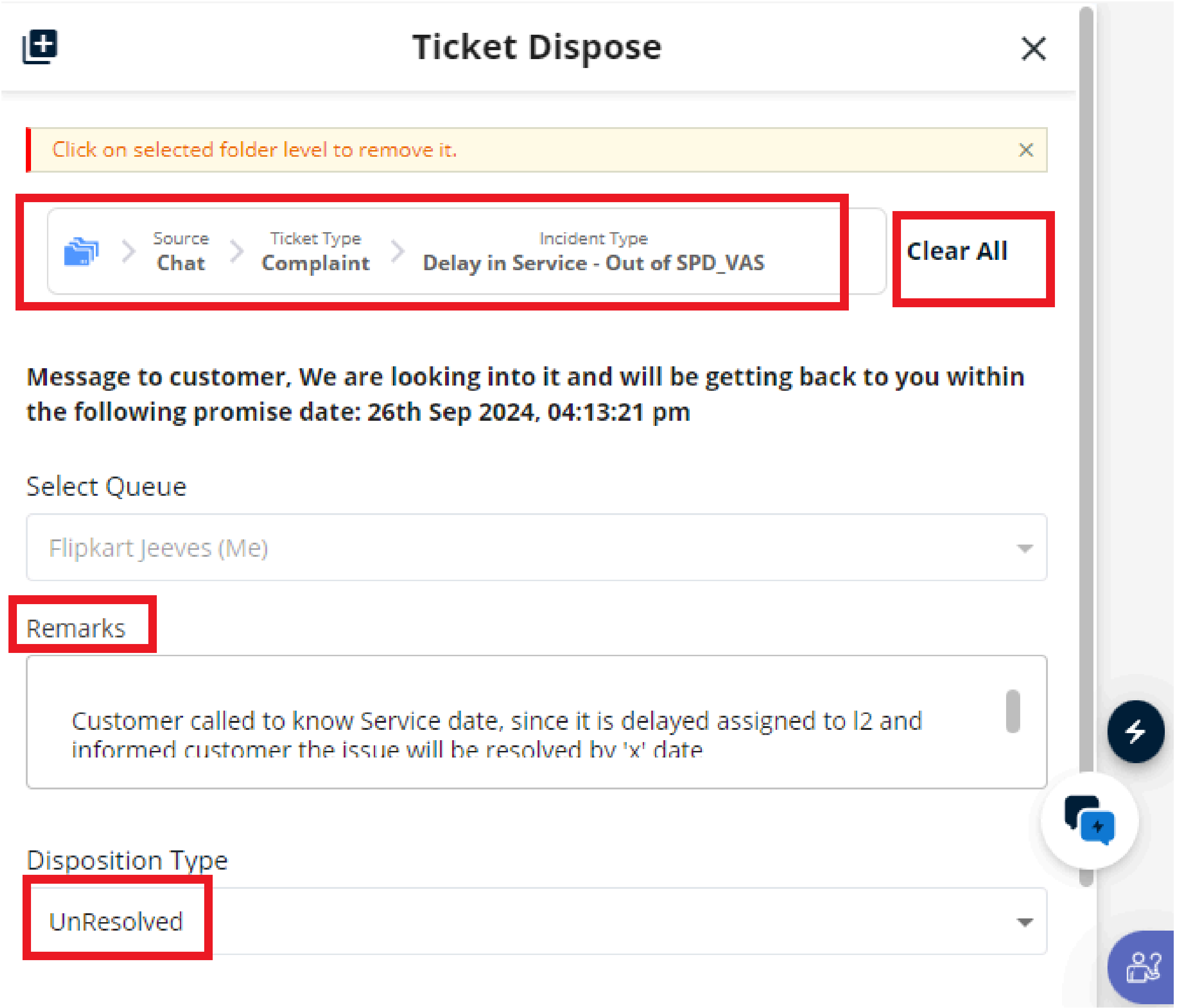
❖ Dispose Ticket

Agents need to dispose of the current ticket using the Dispose Ticket button available within the Policy Detailed view of the ticket.



Upon clicking the ‘**Dispose Ticket’** button, a pop-up opens on the screen to input details for disposing of the ticket.

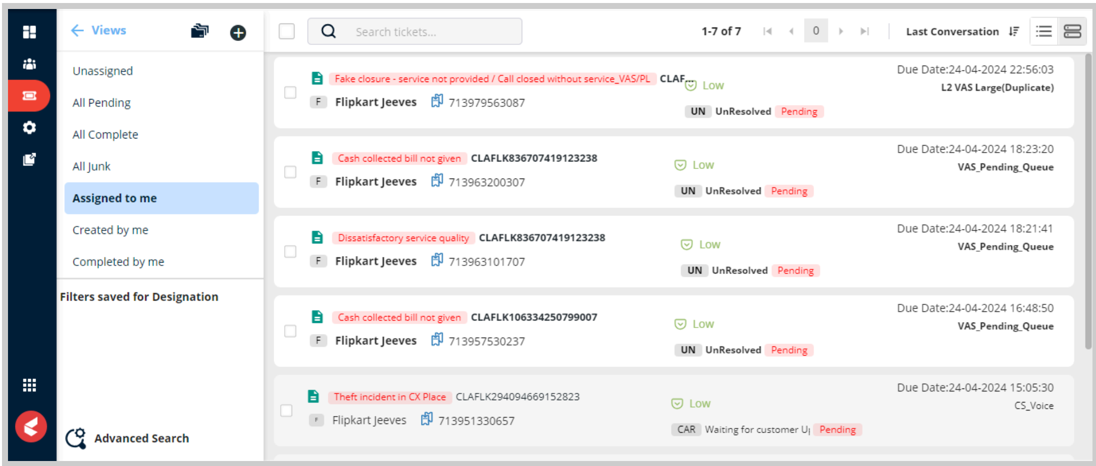
→ Based on the action performed (*outbound call/policy level action*), the Agent will update the ‘**Remarks**’ for the incident.



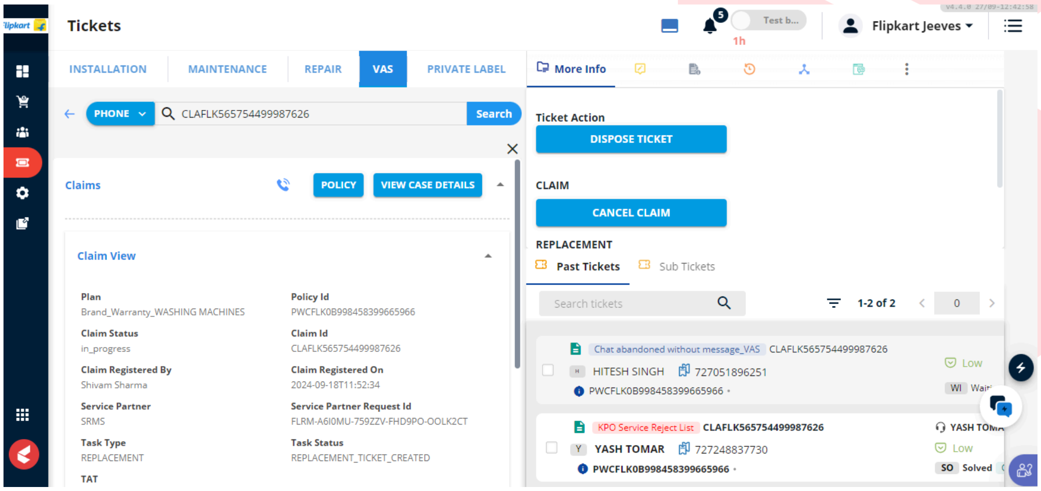
- Further, the agent needs to select a '**Disposition Type'** from one of the 4 options available - *Solved, Waiting for Internal Updates, Waiting for Customer Updates, Unresolved*.
  Note: By default, the tickets assigned to L2 agent will be tagged as 'Unresolved', the agent needs to select an appropriate disposition type based on the action performed (*outbound call/policy level action*).

➢ Once the ticket has been disposed of as mentioned above, the pop-up closes and,

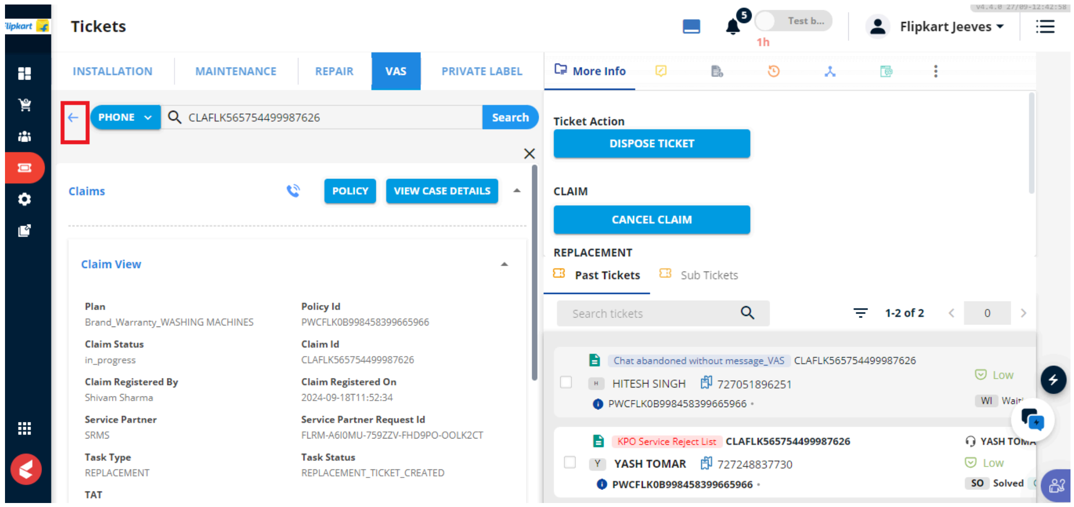
- Agent will be redirected to the Ticket Listing page in case the Ticket is disposed of as ‘Solved’.



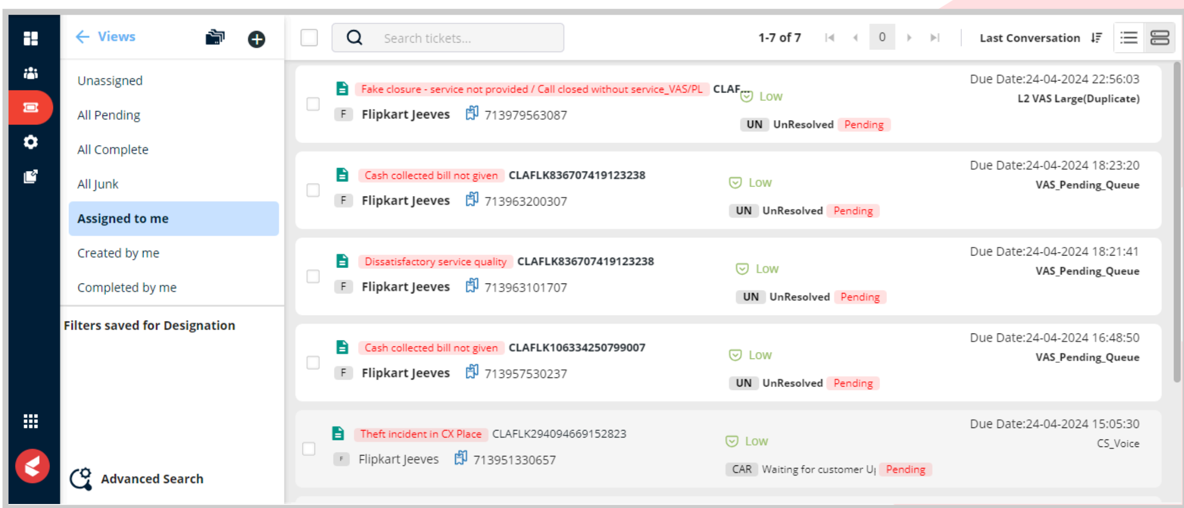
- Agent will be in the same Claim Detailed screen incase of Ticket is disposed of as ‘Waiting for Internal Updates’, ‘Waiting for Customer Updates’ or ‘Unresolved’.



- Post this, the agent needs to click on ‘Go Back’ as shown in the below screenshot to close this ticket and move back to the ticket listing page.



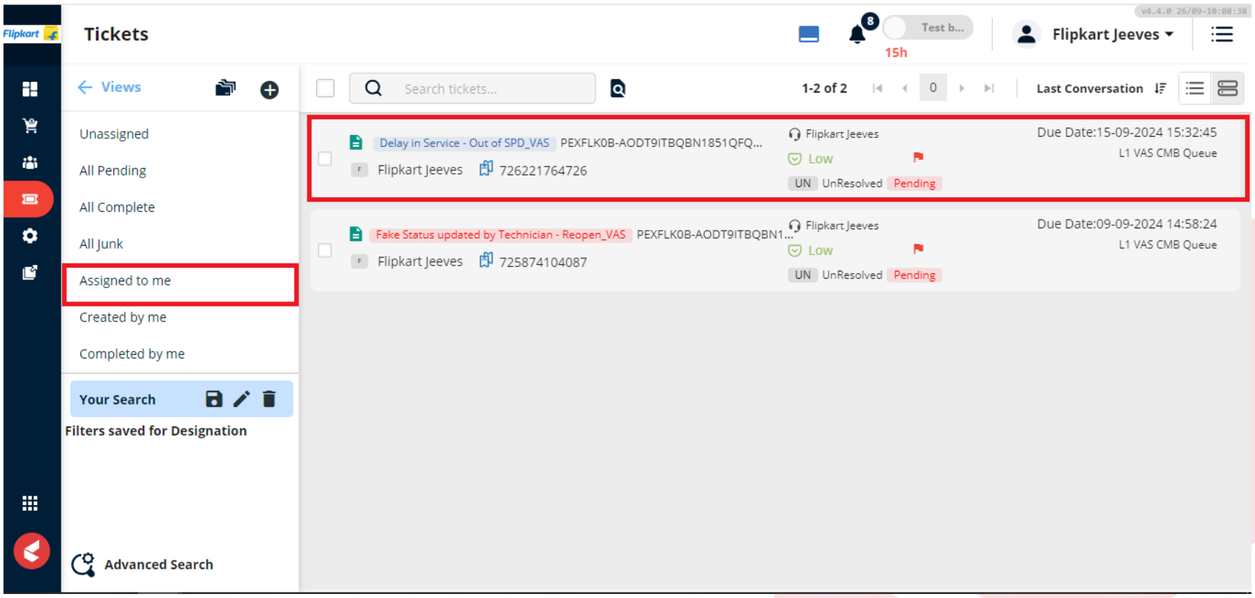
➢ In both the above cases, agents will be landing on the Ticket listing page '<u>Assigned to Me</u>' section with a list of tickets assigned to the agent. Agents can now start work on the next assigned ticket.



1. Ticket Tagged with a Claim

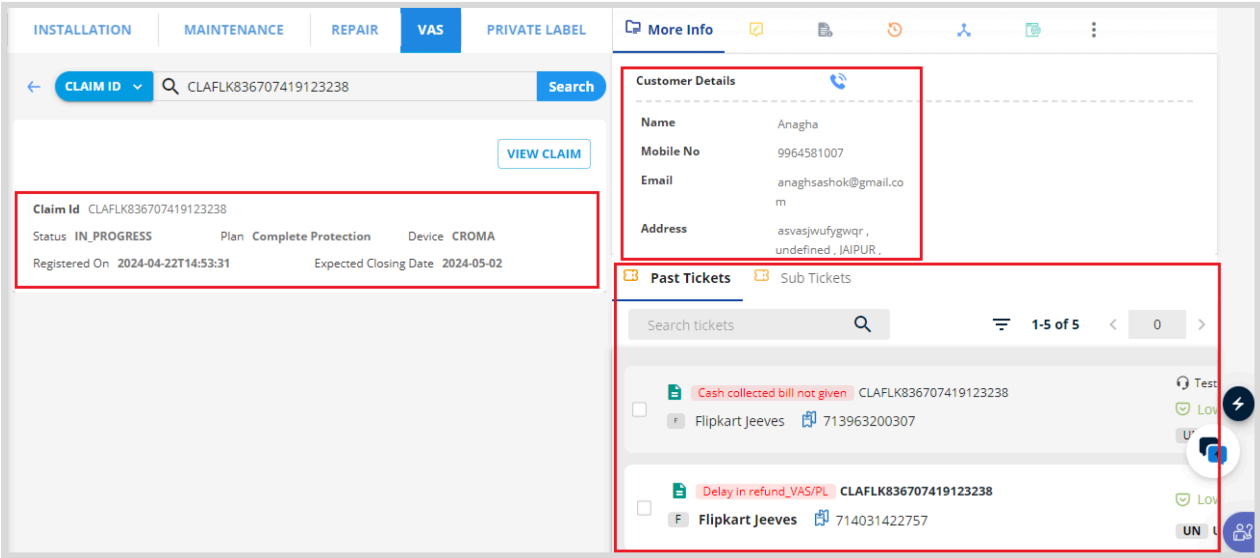
An Incident ticket tagged with a Claim is one in which an customer has created an incident at a Claim Level and is 'Unresolved'.

➢ As a first step, the agent needs to click on a particular ticket assigned to them from the listing page.

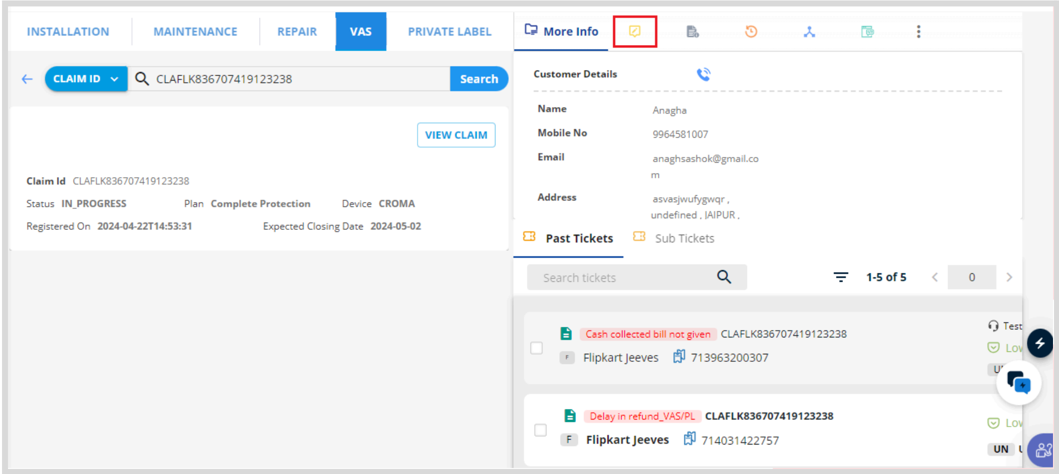


➢ Upon clicking the ticket, a ticket detail view opens on the screen

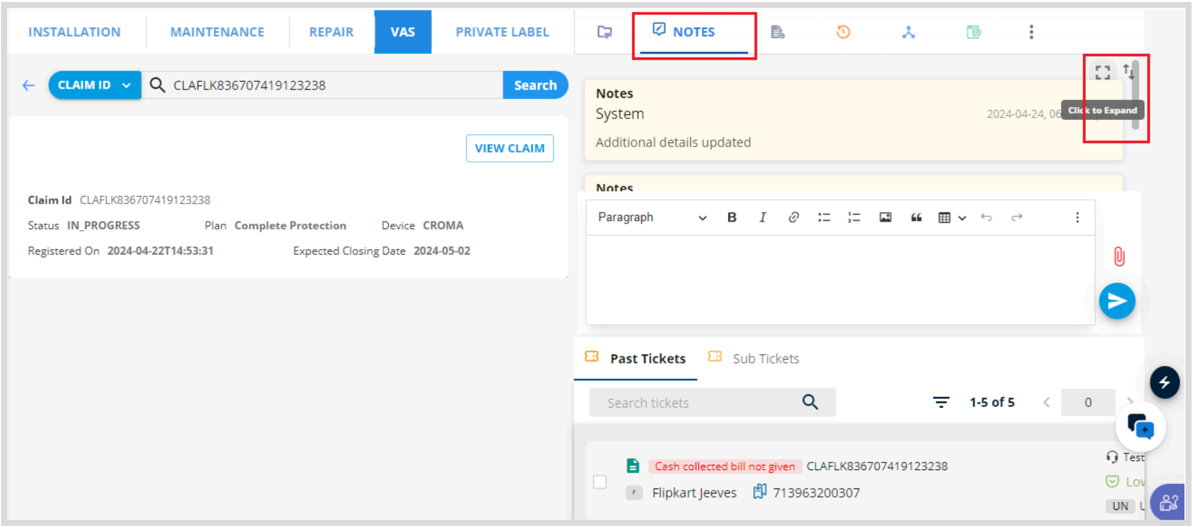
- Agents can view high level information of the tagged **Claim** on the left side while **Customer Details** along with any **Past tickets** are visible on the right side of the screen

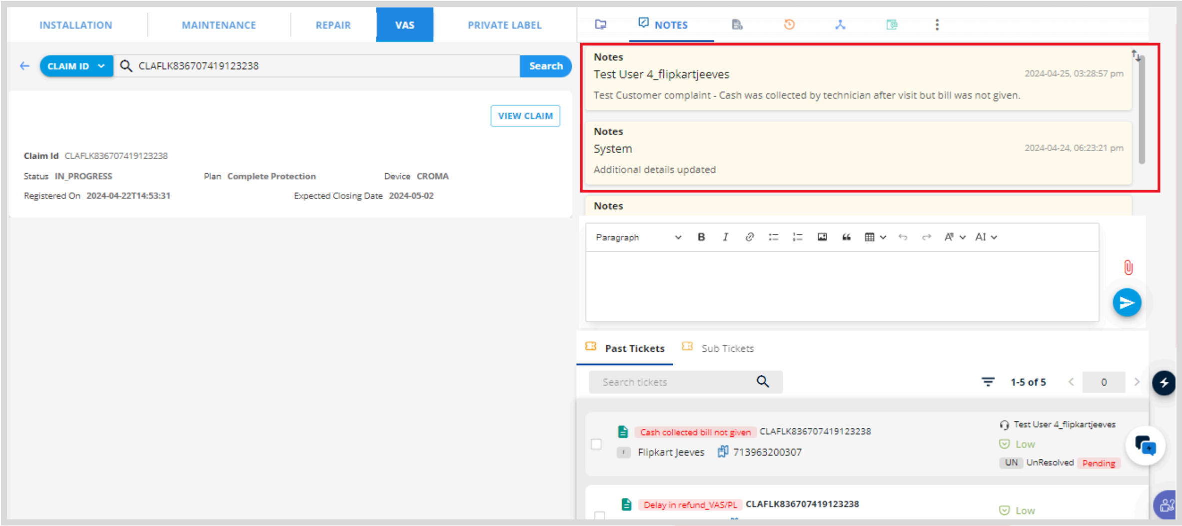


➢ Further, the agent needs to click on the '**Notes**' icon to view the comments/notes associated with this ticket.

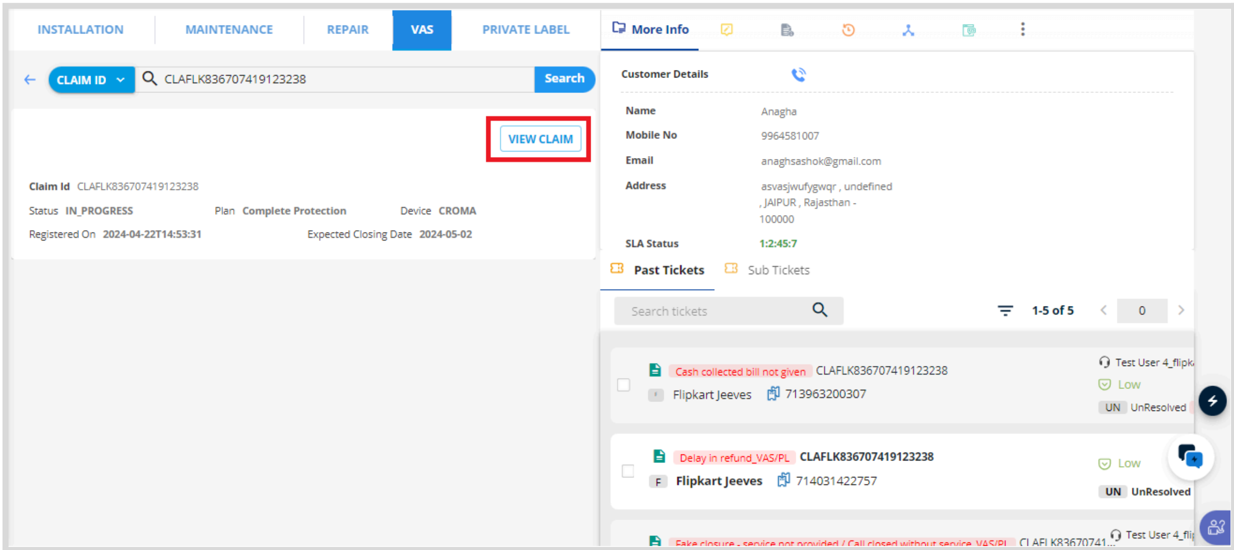


➢ Upon clicking the Notes icon, the '**Notes'** tab will be active as shown in the below screenshot. Agents can use the Expand or Scroll option to view the Notes in detail.

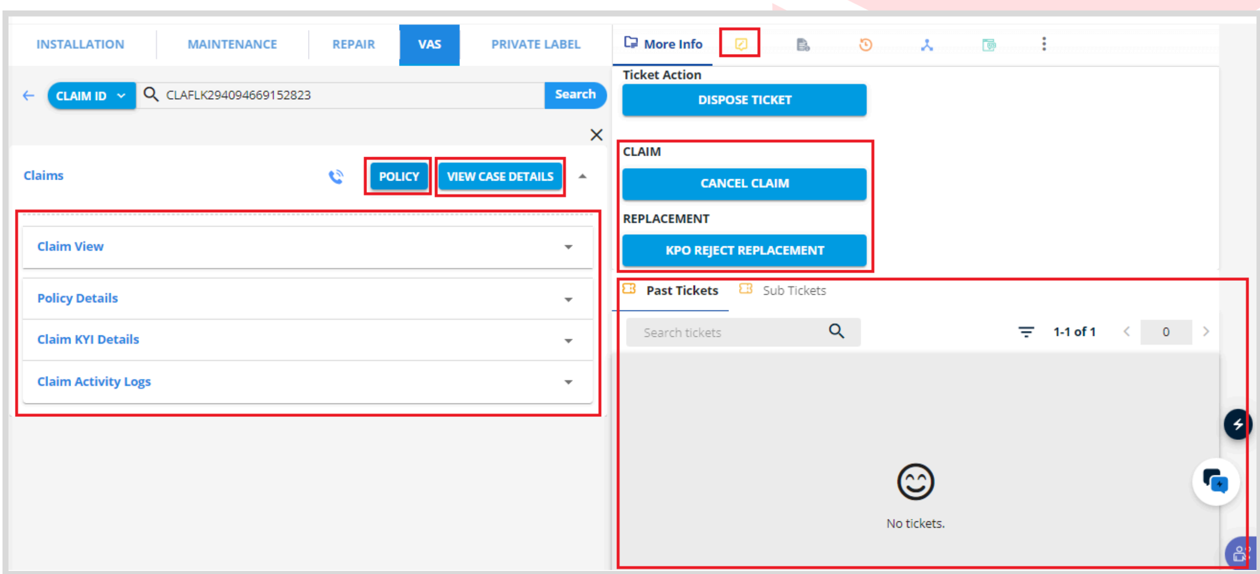




➢ In case, the agent needs to see further details of Claim, click on '**View Claim**' button which will open up the Claim Detailed View screen.



- Agents can view details of the **Claim** on the left side while **Claim Level actions** along with any **Past tickets** are visible on the right side of the screen
- Agents can also view the same 'Notes' from Claim Detailed View by clicking the **Notes** icon
- Agents can use the '**Policy**' button for navigating to the Policy Details page of the Policy associated with this claim and use the **'View Case Details'** button to access SRMS details.



➢ Based on Notes and Claim Details, an Agent can take **Claim Level action** as a next step.

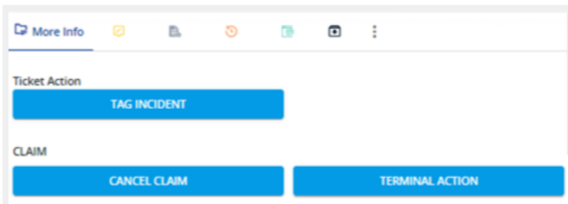
❖ Claim Level Actions

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.



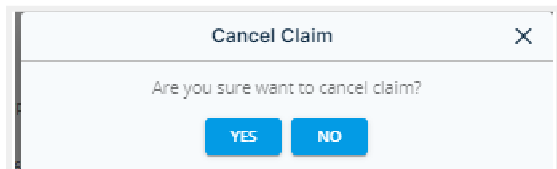
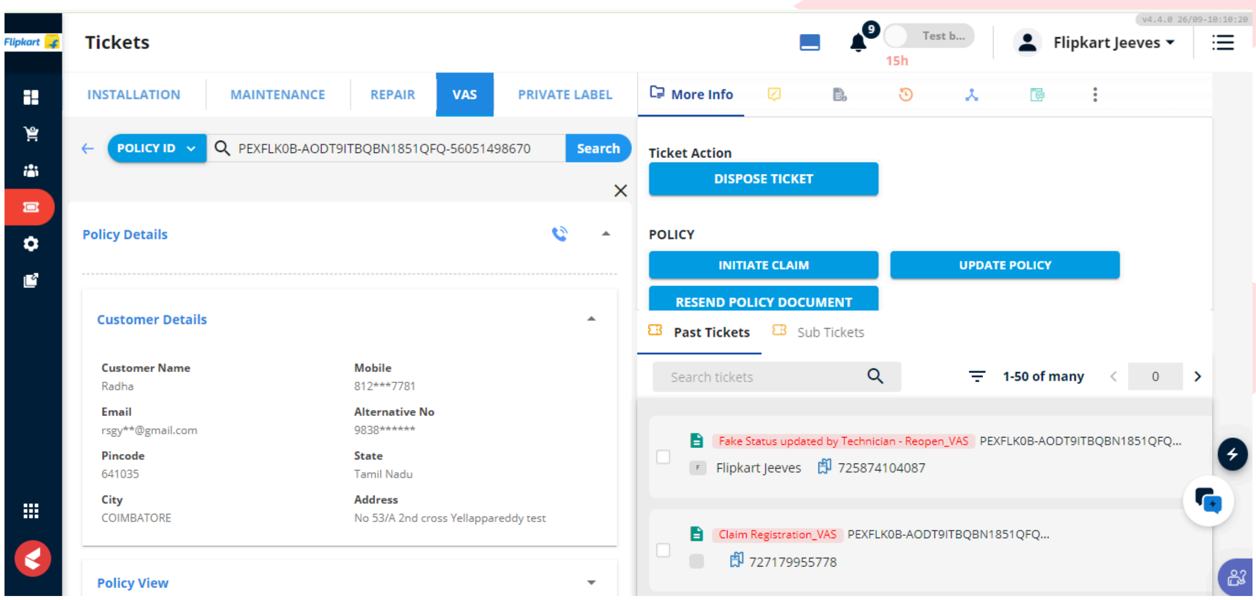


Figure: Cancel Claim

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



- **<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.

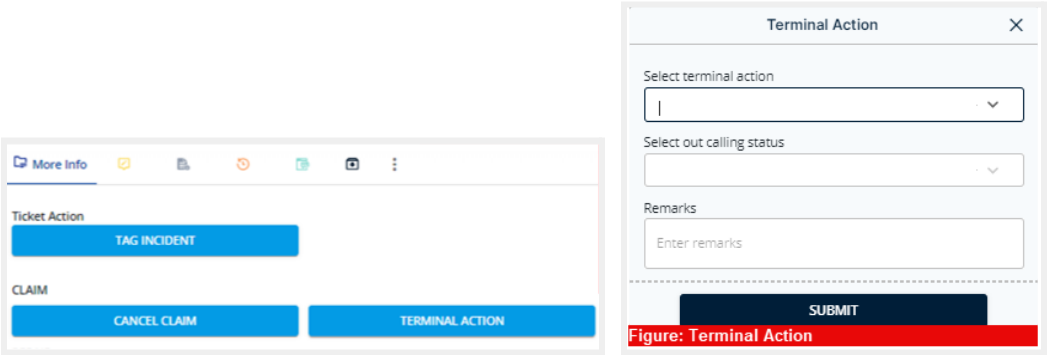
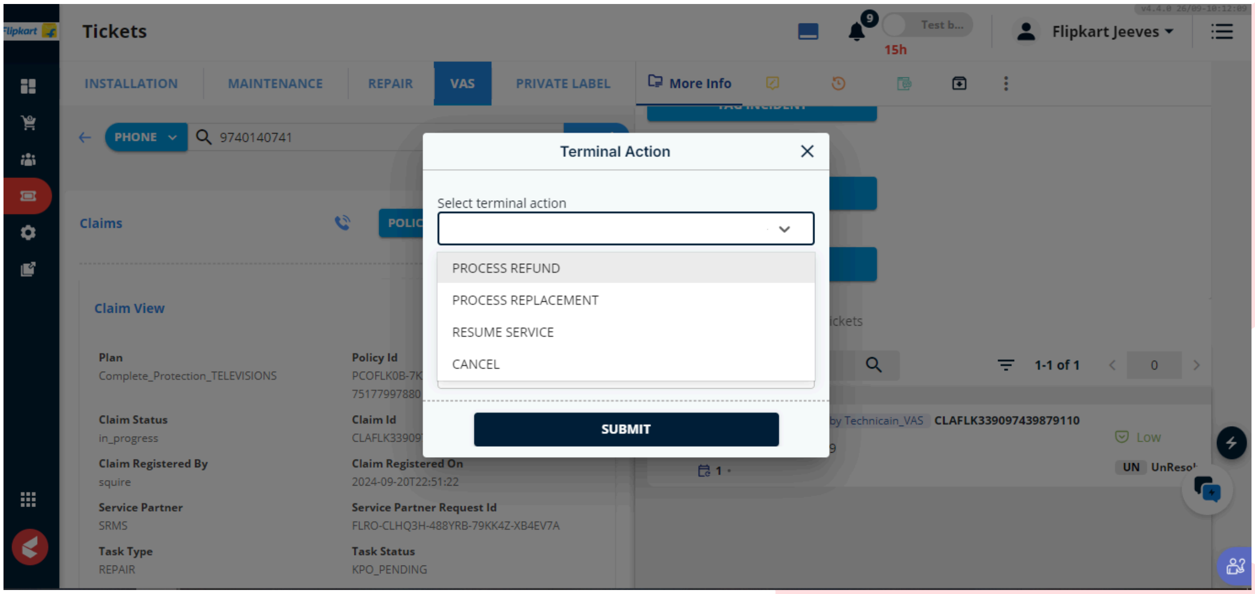
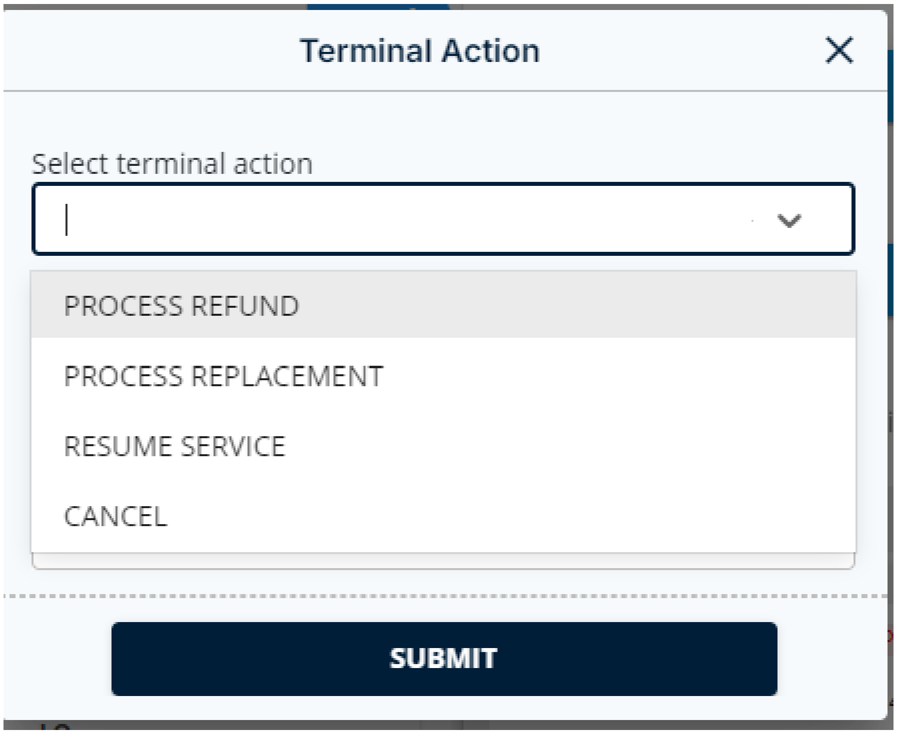


Figure: Terminal Action

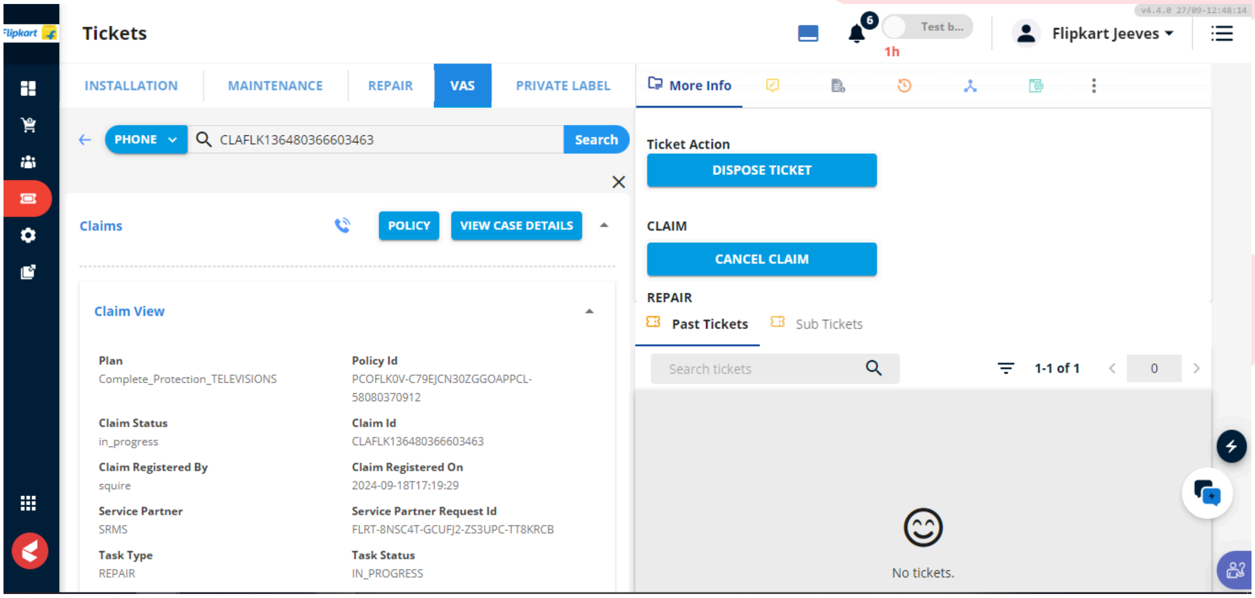
After completing the above action, pop-up closes and the user will be on the same claim detailed view itself.



- **<u>KPO Reject Repair</u>**
  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.

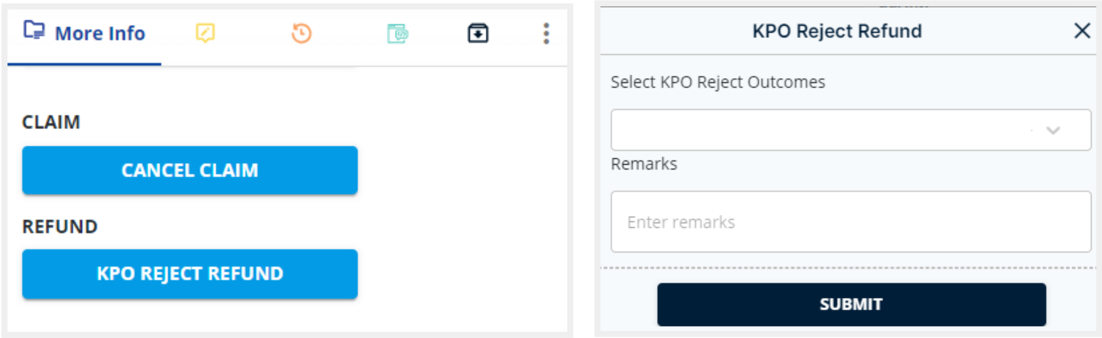


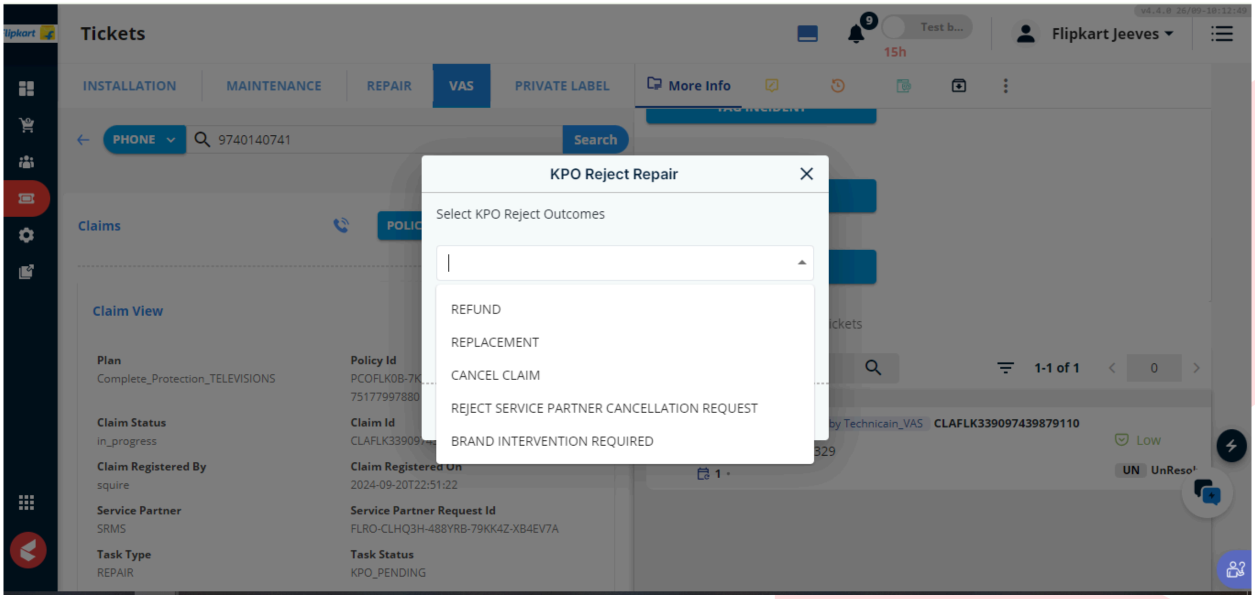
After completing the above action, the pop-up closes and the user will be on the same claim detailed view itself.



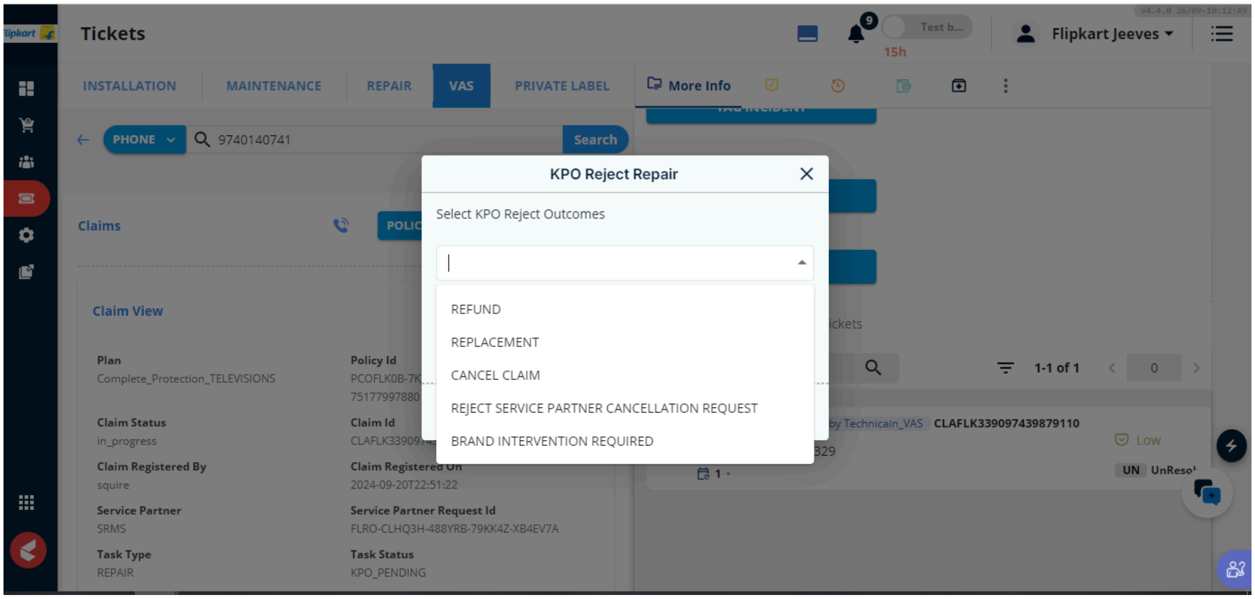
- **<u>KPO Reject Refund</u>**

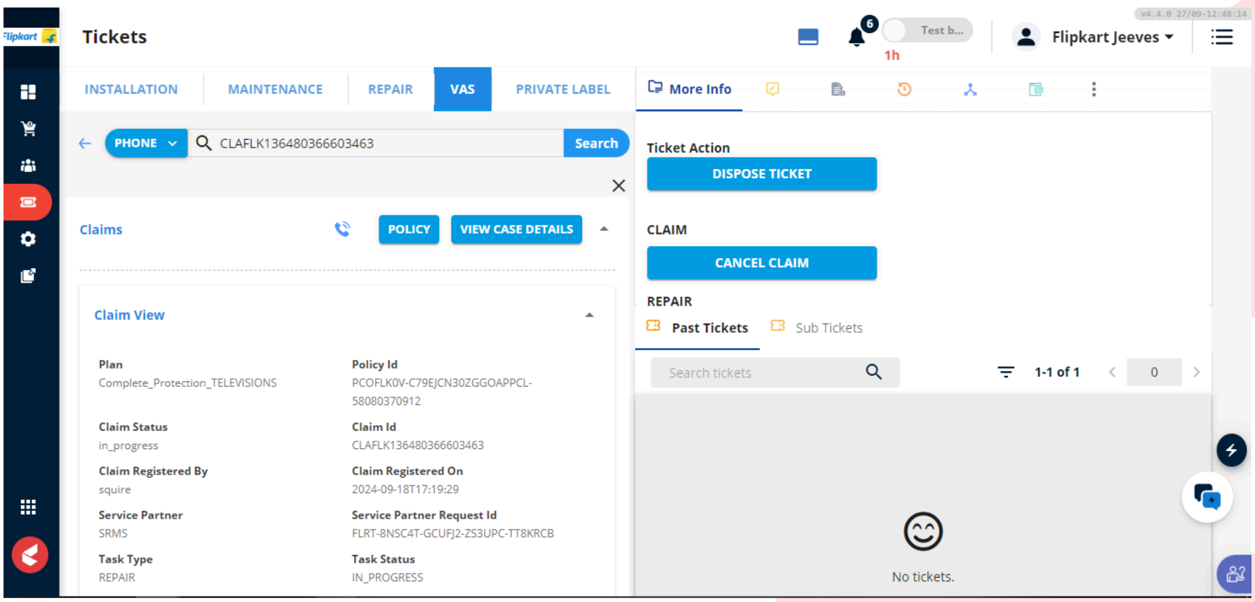
  This functionality enables the agents to take KPO Reject Refund action from the application based on the claim status. Upon clicking the "KPO Reject Refund" button, a pop-up appears on the screen and agents need to provide the necessary information requested and click on the 'Submit' button.



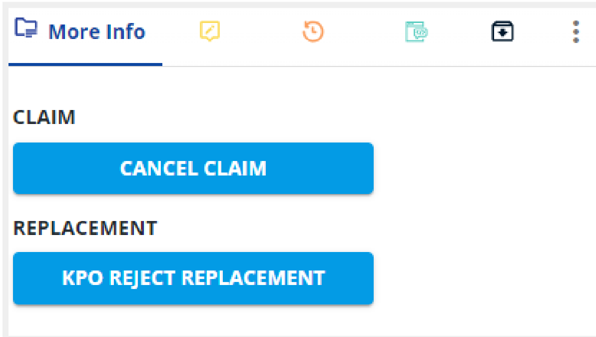


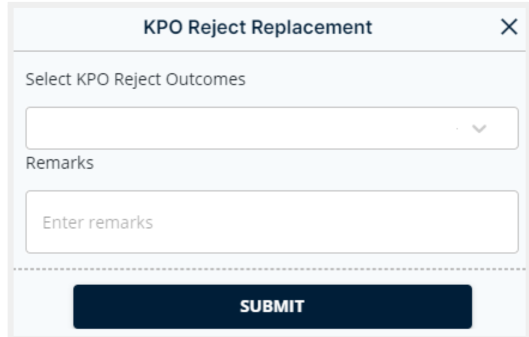
After completing the above action, the pop-up closes and the user will be on the same claim detailed view itself.

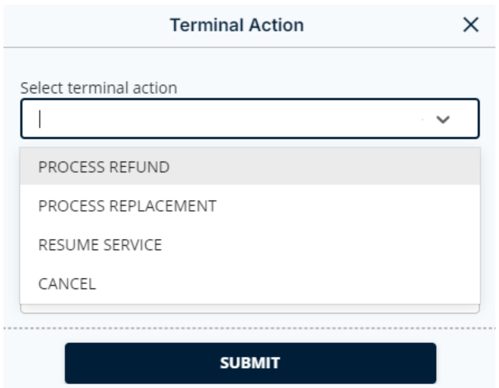




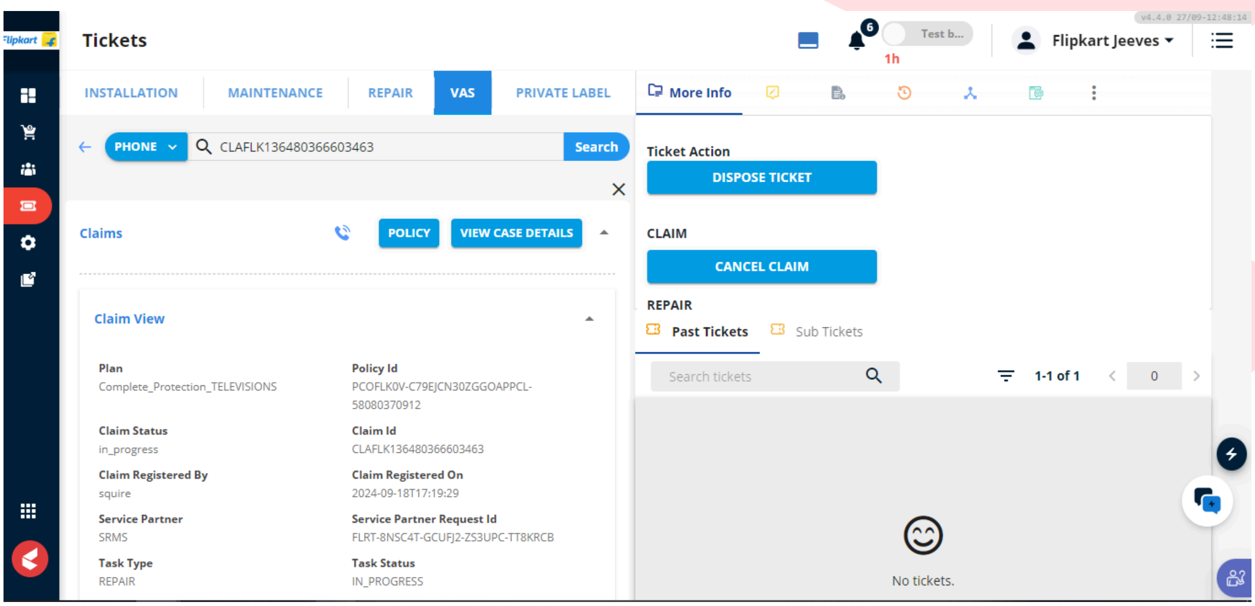
- **KPO Reject Replacement**
  This option enables the agents to take KPO Reject Replacement action from the application based on the claim status. Upon clicking the "KPO Reject Replacement" button, a pop-up appears on the screen and agents need to provide the necessary information requested and click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



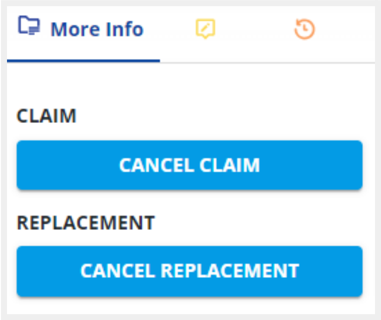


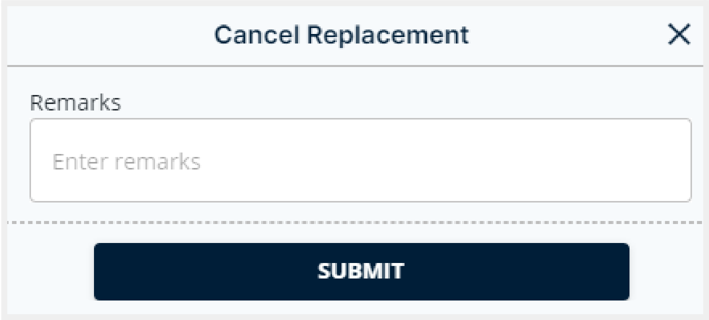


After completing the above action, the pop-up closes and the user will be on the same claim detailed view itself.



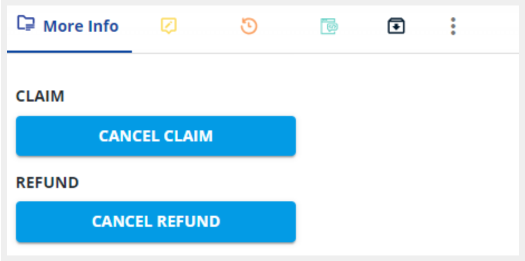
- **Cancel Replacement**
  This functionality enables the agents to take Cancel Replacement action from the application based on the claim status. Upon clicking the "Cancel Replacement" button, a pop-up appears on the screen and agents need to provide the necessary information requested and click on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

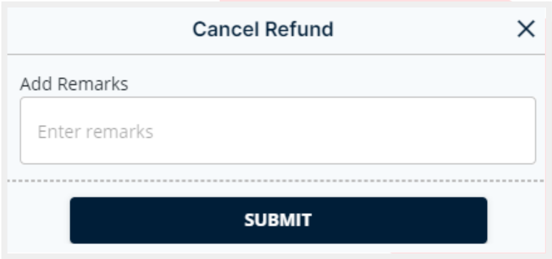




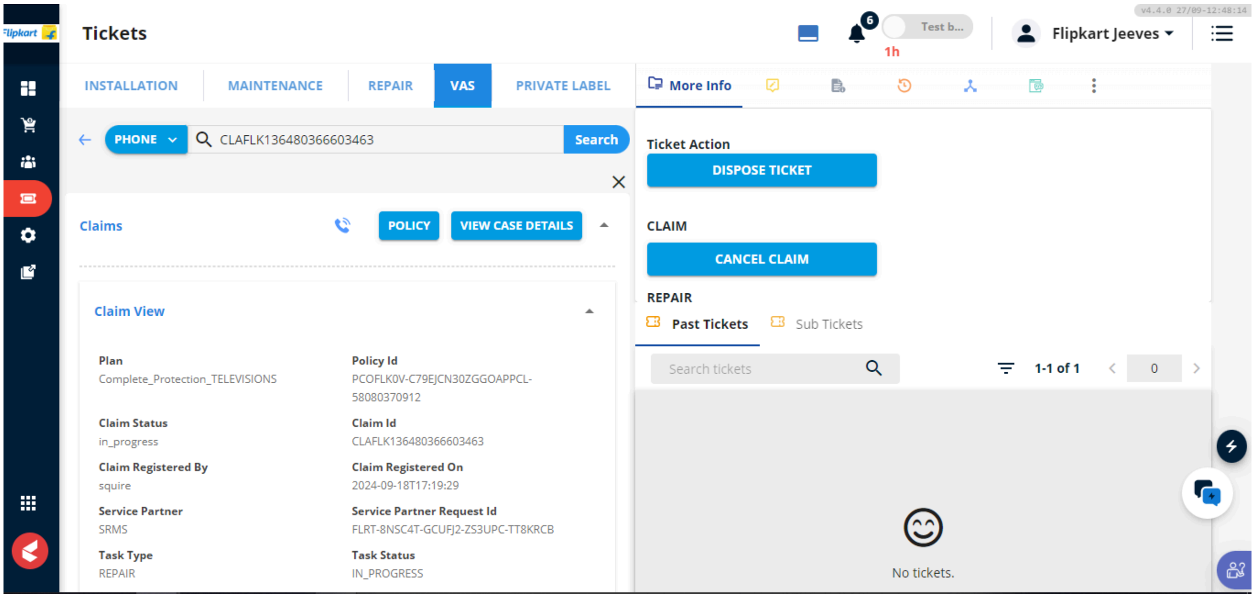
After completing the above action, the pop-up closes and the user will be on the same claim detailed view itself.

- **Cancel Refund**
  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.





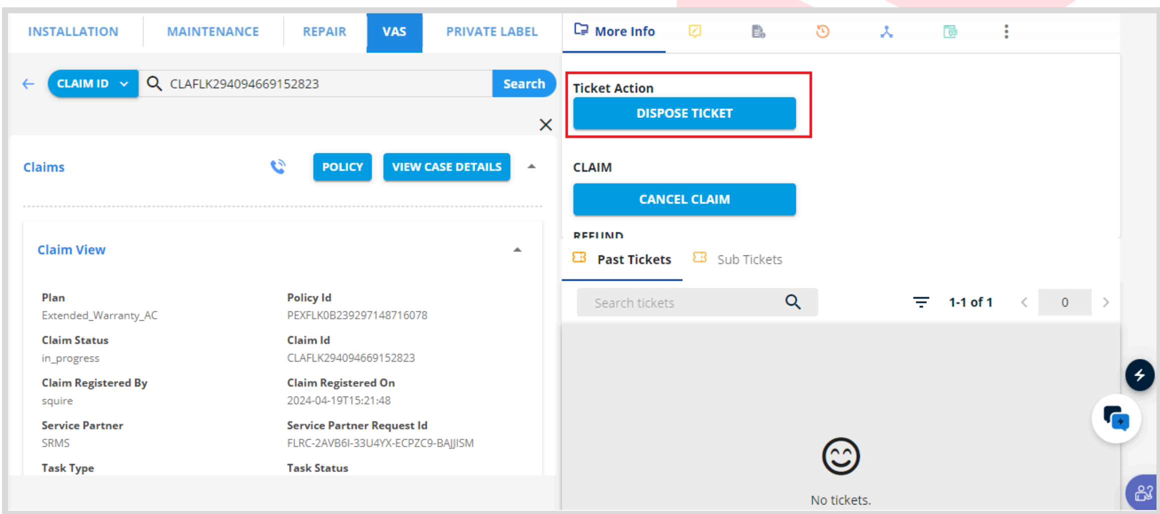
After completing the above action, the pop-up closes and the user will be on the same claim detailed view itself.



➢ Post completing the Manual call to customer and/or Claim Level Action, agent needs to Dispose the existing ticket using ‘**Dispose Ticket’** option

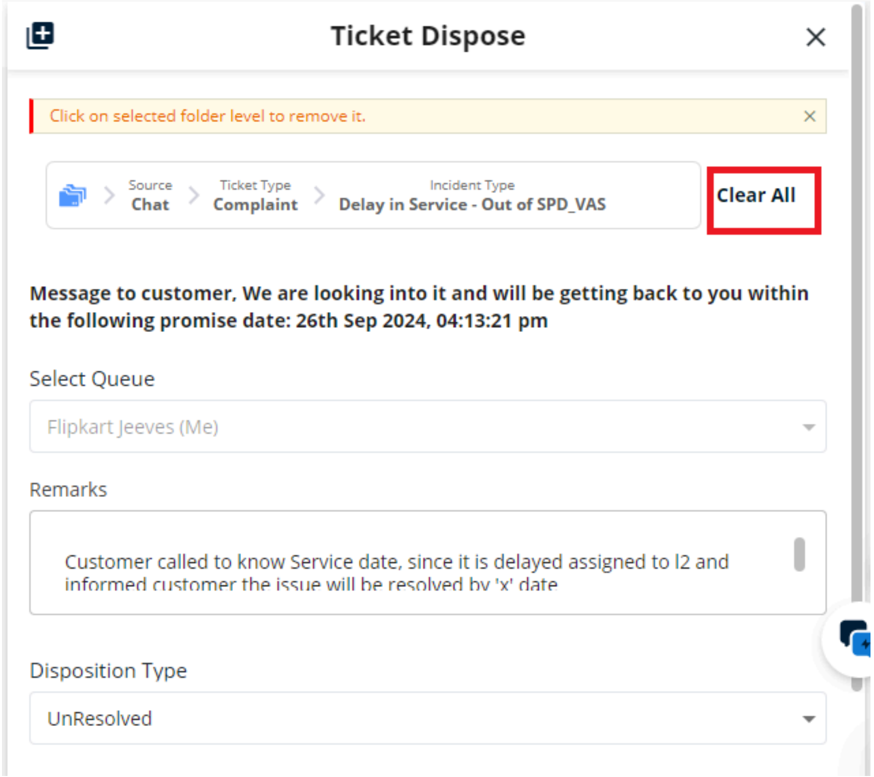
❖ Dispose Ticket

Agents need to dispose of the current ticket using the ‘**Dispose Ticket’** button available within the Claim Detailed view of the ticket.

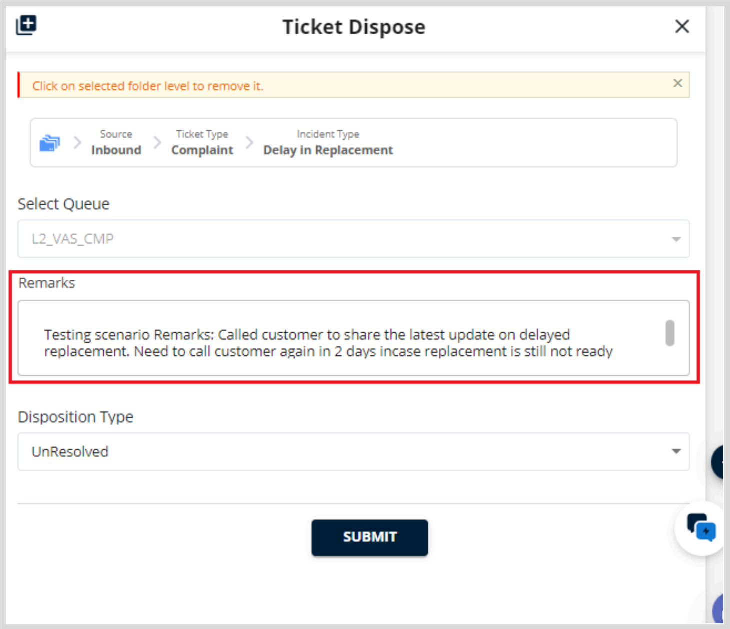


Upon clicking the **Dispose Ticket** button, a pop-up opens on the screen to input details for disposing the ticket.

- If an Agent wants to change the SSI based on the exact issue they can select the Clear option and tag the correct incident type.

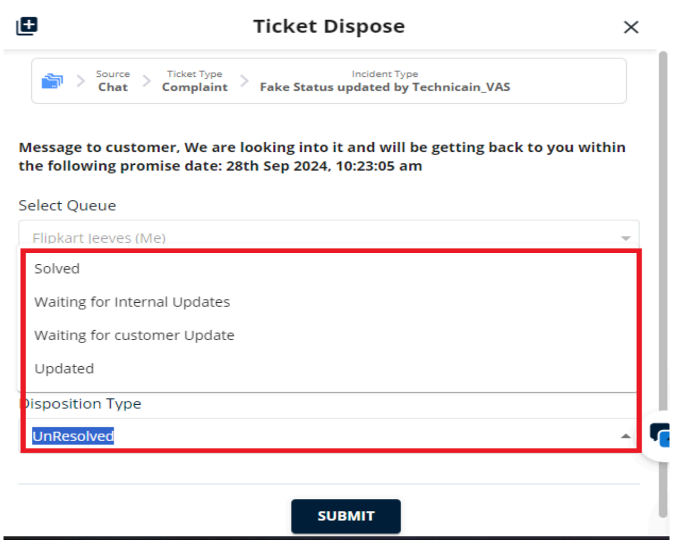


- Based on the action performed (*outbound call/claim level action*), the Agent will update the '**Remarks**' for the incident.

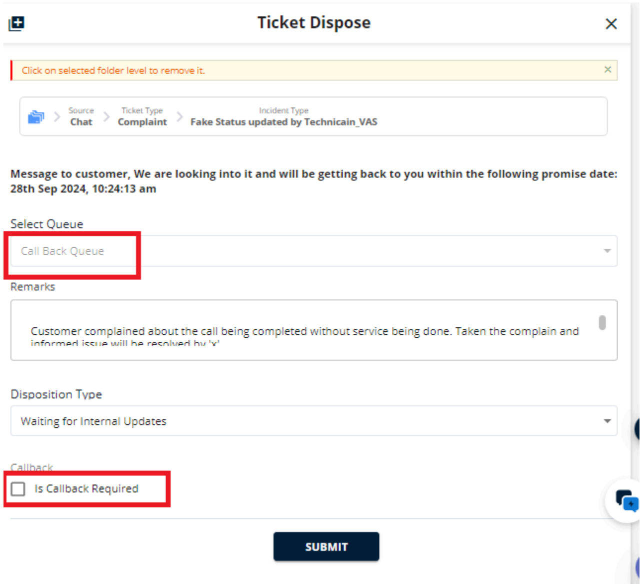


Note: L2 agent will not be able to change any folder or queue details and it will be rendered **non-editable** by greying them out, as shown in the above image.

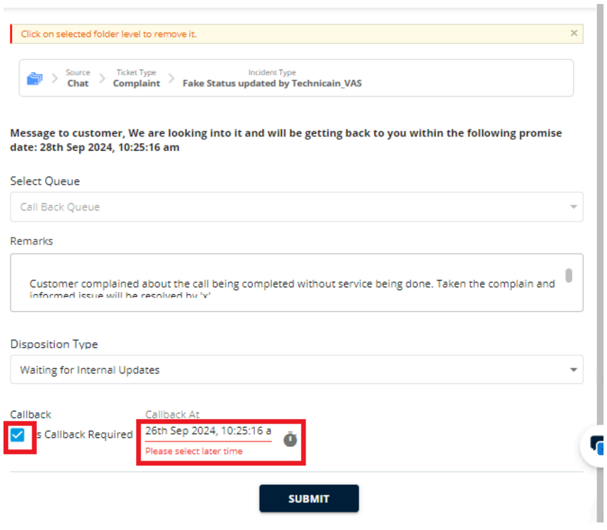
- Further, the agent needs to select a '**Disposition Type'** from one of the 4 options available - *Solved, Waiting for Internal Updates, Waiting for Customer Updates, Unresolved*.
  Note: By default, the tickets assigned to L2 agent will be tagged as 'Unresolved', the agent needs to select an appropriate disposition type based on the action performed (*outbound call/policy level action*).

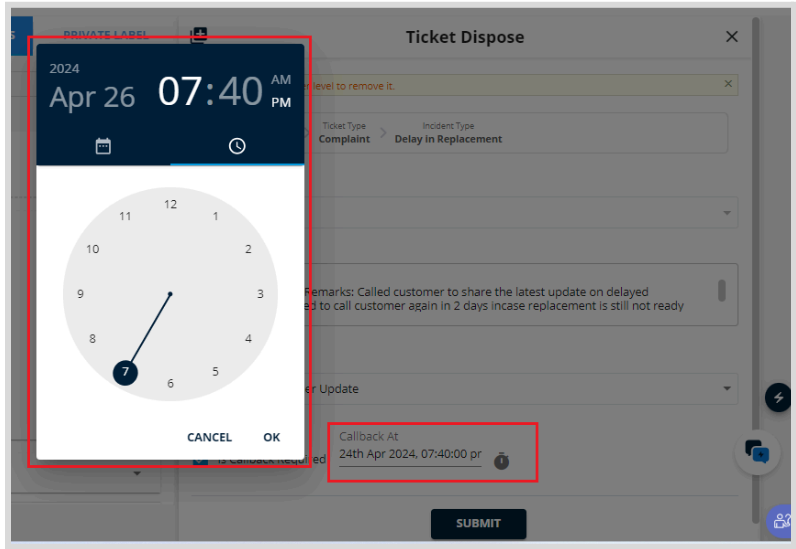


  - If the Disposition Type is chosen as either Waiting for Internal Updates or Waiting for Customer Updates, then an additional **Call Back** option appears.
    - Agent needs to mandatorily Opt in for the Call Back option while the queue will be automatically changed to Call Back queue when either of these 2 disposition types are selected.

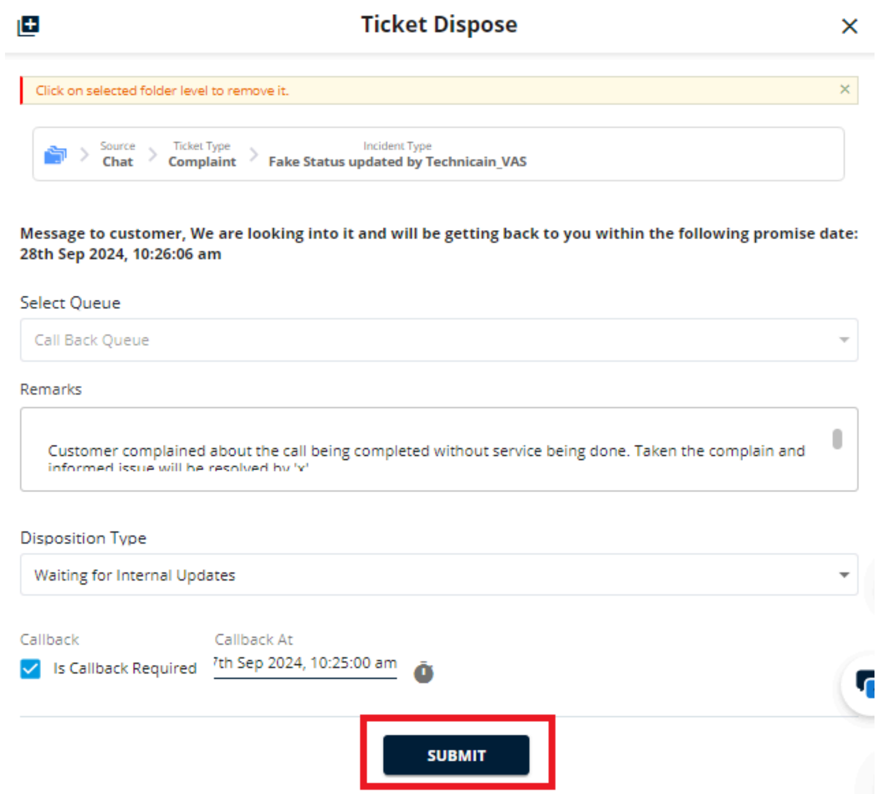


- For Call Back cases, agents need to Click on the Checkbox upon which Call Back Time selection appears. Select the 'Date & Time' for call back by clicking on the 'Callback At' field as highlighted in the below image.





- Finally, the agent needs to click on the ‘**Submit**’ button to complete the Ticket Dispose process.

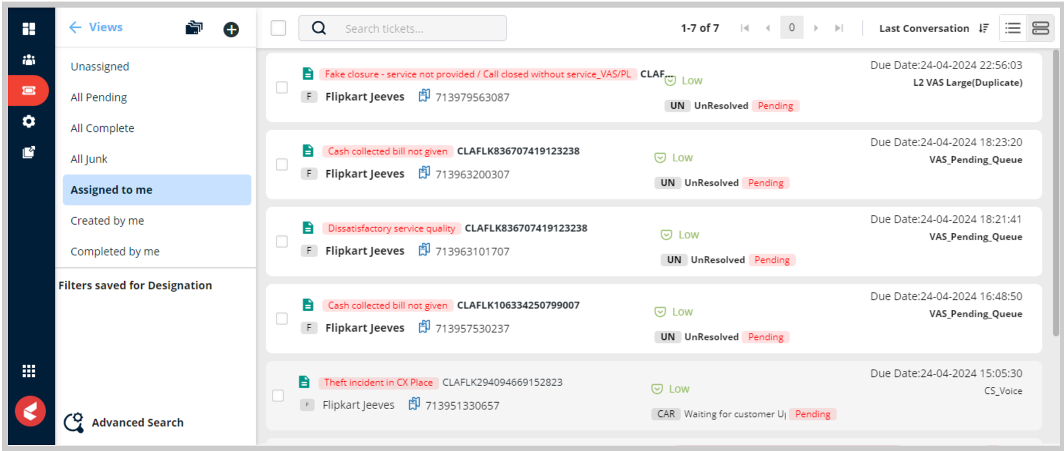


Please note that **disposing of a ticket tagged with a Claim** can have one of the below mentioned scenarios.

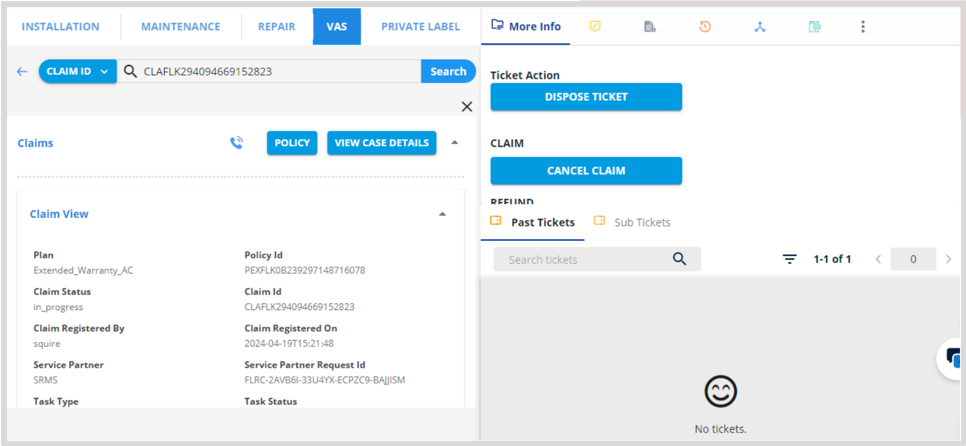
- Claim with an active SRMS Incident: The ‘Remarks’ and ‘Disposition Type’ selected while disposing the ticket will also be updated in the corresponding SRMS incident along with the current ticket disposed of by the agent in Kapture.
- Claim without SRMS Incident: The ‘Remarks’ and ‘Disposition Type’ selected while disposing the ticket will only be updated in the current ticket disposed of by the agent in Kapture.

➢ Once the ticket has been disposed of as mentioned above, the pop-up closes and,

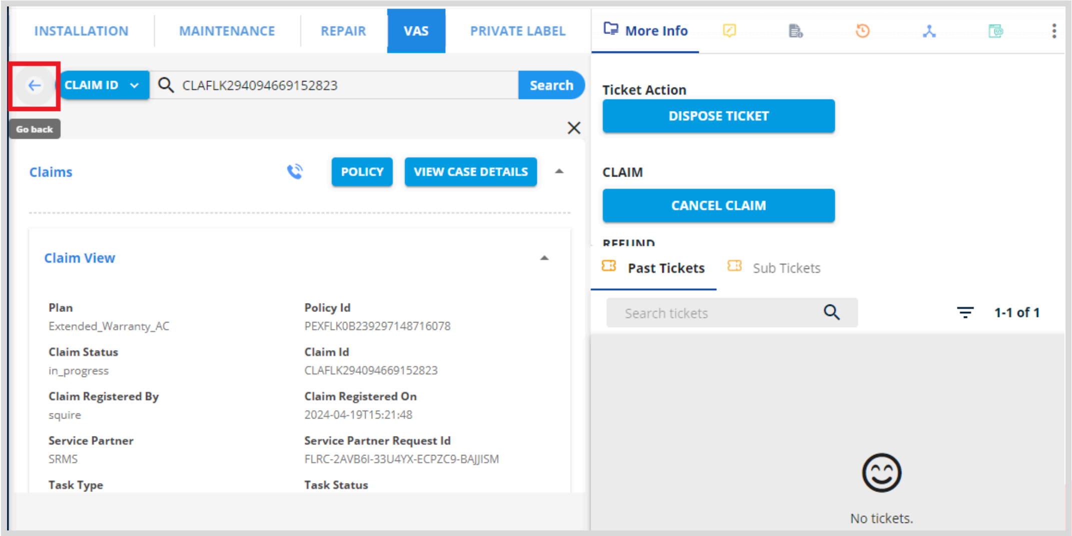
- ○ Agent will be redirected to the Ticket Listing page in case the Ticket is disposed of as ‘Solved’.



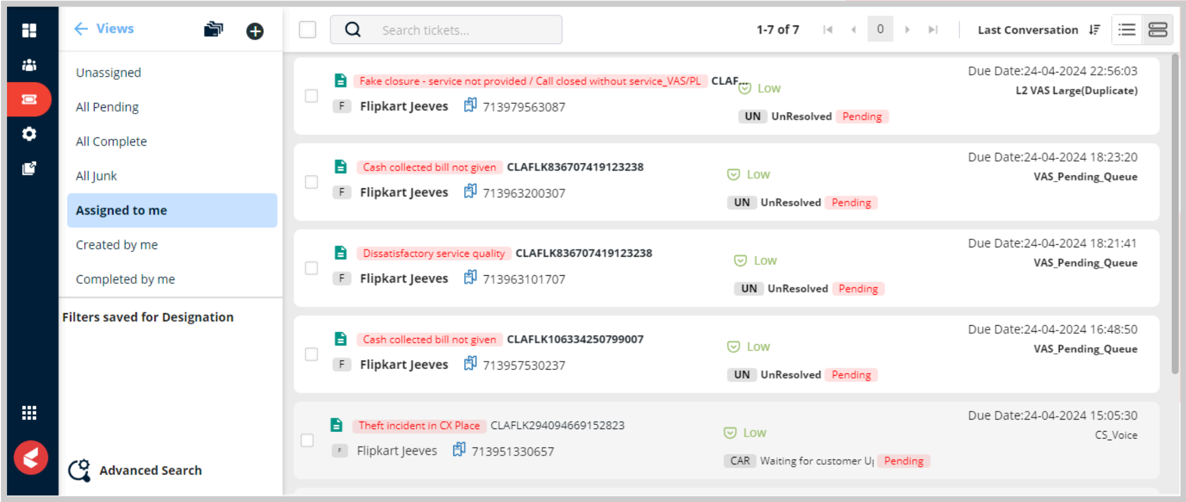
- ○ Agent will be in the same Claim Detailed view screen incase of Ticket is disposed of as ‘Waiting for Internal Updates’, ‘Waiting for Customer Updates’ or ‘Unresolved’.



- Post this, the agent needs to click on 'Go Back' as shown in the below screenshot to close this ticket and move back to the ticket listing page.



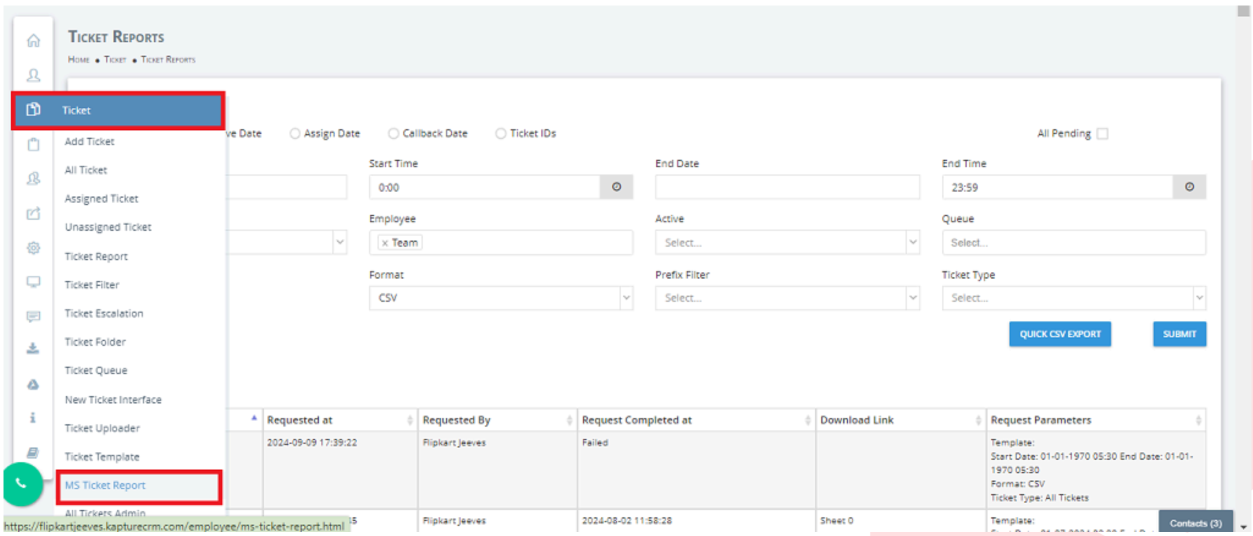
➢ In both the above cases, agents will be landing on the Ticket listing page 'Assigned to Me' section with a list of tickets assigned to the agent. Agents can now start work on the next assigned ticket.



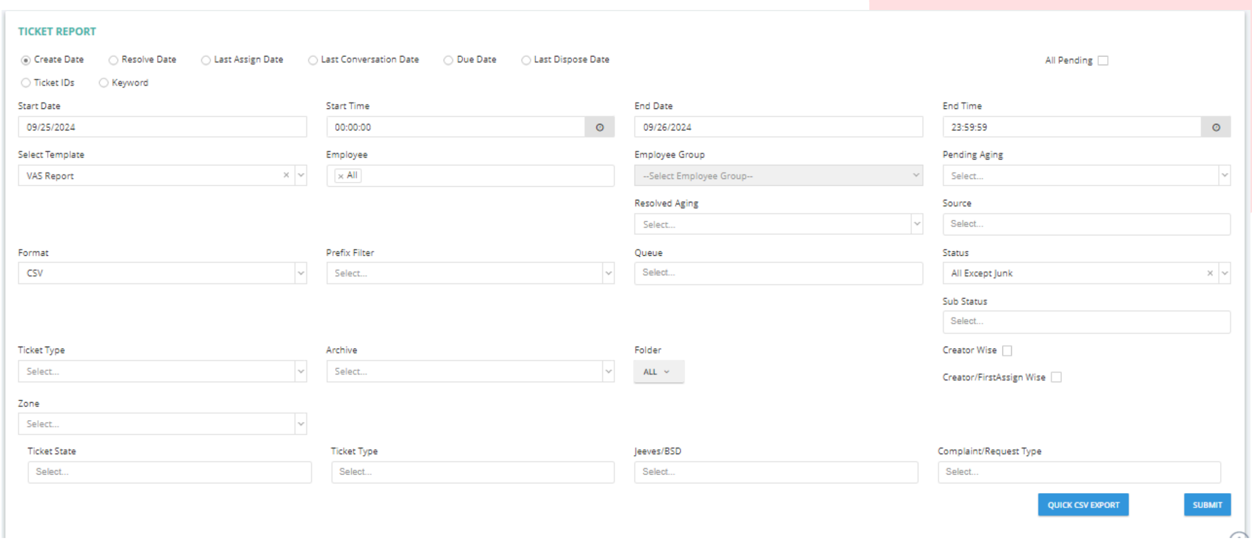
Supervisor:

❖ Download Report

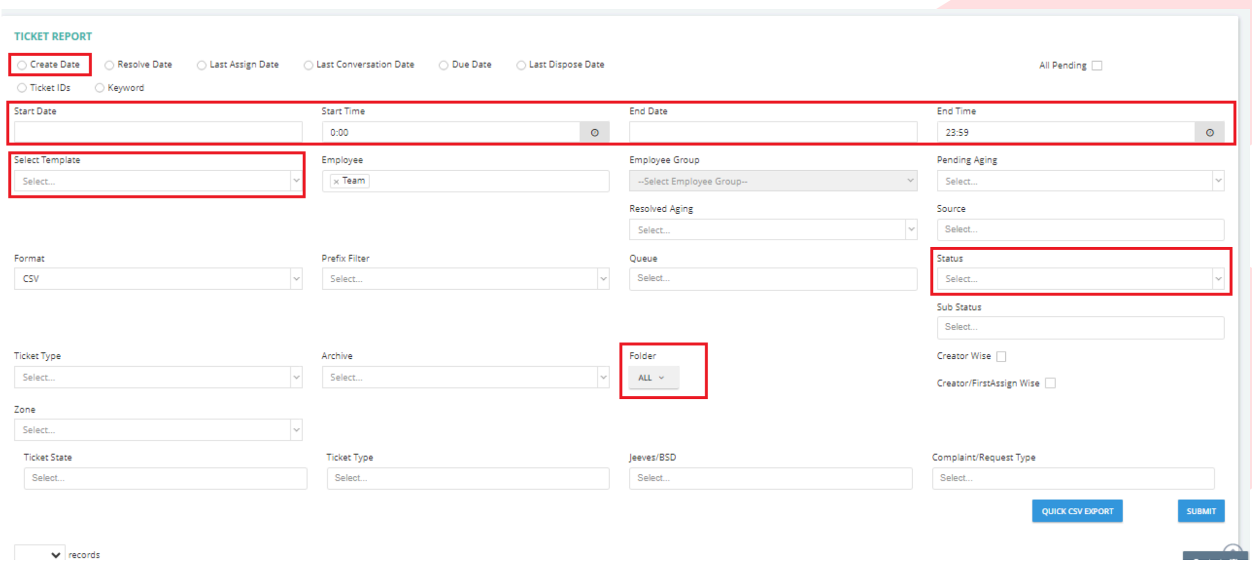
- Agents need to download the below report and update into the google tracker which they are maintaining.
    - Policy Cancellation Report
    - Terminal Action Report
    - VAS Refund report.
- Agents can navigate to report download via below options.
    - Clicking on the “**MS Ticket Report**” option under Tickets tab.



    - Scroll down towards the end and you will be able to see the “**TICKET REPORT**”.



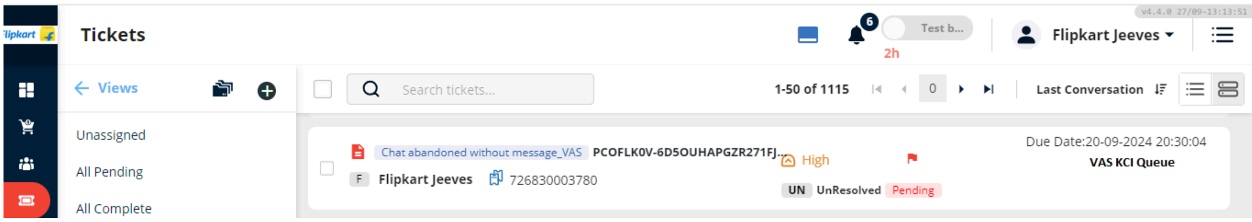
- Use the below filter option to download the mentioned report above.
    - Create Date
    - Start date and time
    - End date and time
    - Select Template (Supervisor can select only one report at a time)
        - VAS Cancel Report
        - VAS Terminal Report
        - VAS Refund Report
    - Employee - All
    - Status - All Except Junk
    - Folder - Select the folder based on the report mentioned below.
        - VAS Cancel Report - **Chat | Complaint| Policy Cancellation Request Follow up_VAS**
        - VAS Terminal Report - **Chat | Enquiry | Terminal Action_VAS**
        - VAS Refund report **- Chat | Compliant | RSA approval required_VAS**
- And finally click the submit option to download the report.



❖ Ticket flow

➢ The below mentioned SSI which is parked will land into **"VAS Waiting for internal update".**

➢ After TAT is completed automatically based on FIFO method ticket will assigned to L2 agent which is in **"VAS KCI queue"**



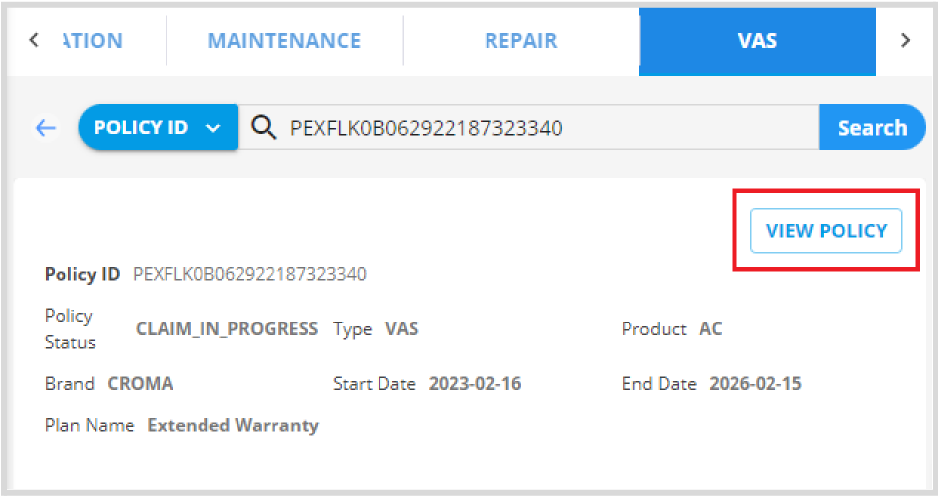
Tagging IMS	Updated SSI	Recommen	SRMS IMS	Queue	Tat brached/No res	REsolution avalible /Agent	TAT
Complaint	Blank call/Call drop	1CR	No	L1 VAs CMB queeu	VAS KCI Queue		4 hrs
Complaint	Delay in Service - Out of SPD	1CR	Yes	VAs Waiting for internal update queue	VAS KCI Queue		48 hrs
Complaint	Rude behaviour by Technician	1CR	Yes	VAs Waiting for internal update queue	VAS KCI Queue	VAS Closelooping queue	48 hrs
Complaint	Extra Cash Collected By Technician	1CR	Yes	VAs Waiting for internal update queue	VAS KCI Queue	VAS Closelooping queue	48 hrs
Complaint	WCS Incident	1CR	Yes	VAs Waiting for internal update queue	VAS KCI Queue	VAS Closelooping queue	48 hrs
Complaint	ST not responding/not Reachable	1CR	Yes	VAs Waiting for internal update queue	VAS KCI Queue	VAS Closelooping queue	24hrs
Complaint	Create Revisit Ticket	1CR	Yes	VAs Waiting for internal update queue	VAS KCI Queue		48hrs
Complaint	Delay in Defective pickup	1CR	Yes	VAs Waiting for internal update queue	VAS KCI Queue		24hrs
Complaint	Delay in refund	1CR	No	L1 VAs CMB queeu	VAS KCI Queue	VAS Closelooping queue	4hours
Complaint	Delay in Replacement	1CR	No	L1 VAs CMB queeu	VAS KCI Queue	VAS Closelooping queue	4hours
Complaint	Fake Status updated by Technicain	1CR	Yes	VAs Waiting for internal update queue	VAS KCI Queue	VAS Closelooping queue	48 hrs
Complaint	Pickup done, but service cancelled	1CR	yes	VAs Waiting for internal update queue	VAS KCI Queue	VAS Closelooping queue	4hrs
Complaint	ST damaged customers product	1CR	yes	VAs Waiting for internal update queue	VAS KCI Queue	VAS Closelooping queue	48 hrs
Complaint	Unable to register a claim	1CR	No	L1 VAs CMB queeu	VAS KCI Queue	VAS Closelooping queue	4hrs
Complaint	Processing fee Failure	1CR		L1 VAs CMB queeu	VAS KCI Queue		4hrs
Complaint	KPO Reject - Part Request Rejected	1CR		L1 VAs CMB queeu	VAS KCI Queue	VAS Closelooping queue	24hrs

1. Policy Detailed View

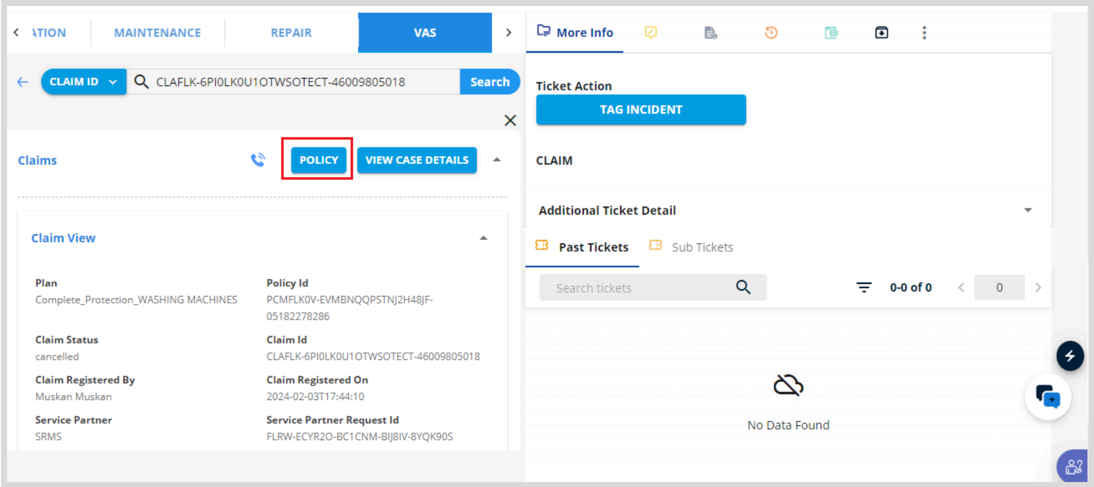
Policy Detailed View provides users with detailed information related to the Policy purchased by the customer.

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

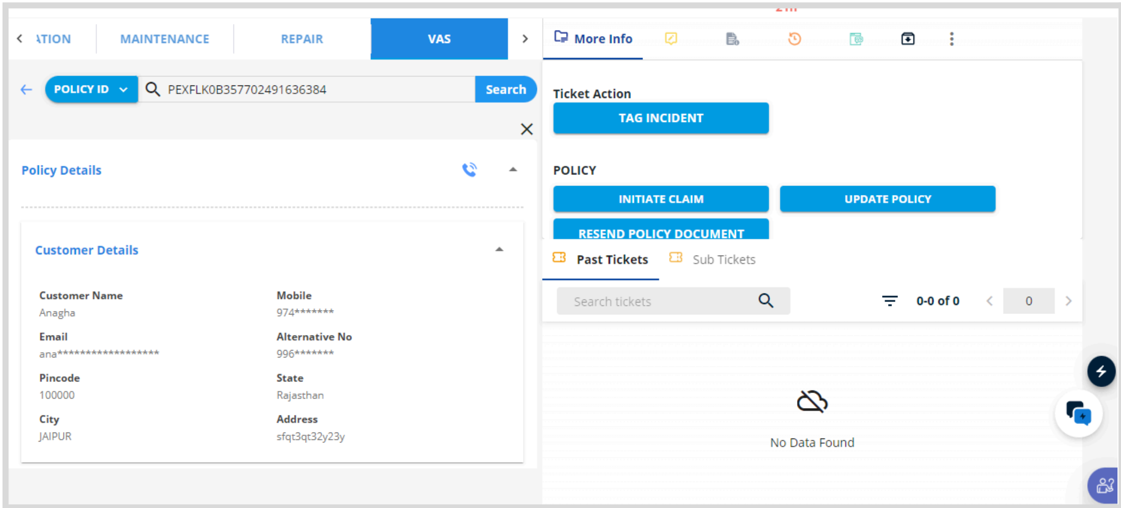
1. Clicking on the '**View Policy**' button within the Policy listing section.



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*.

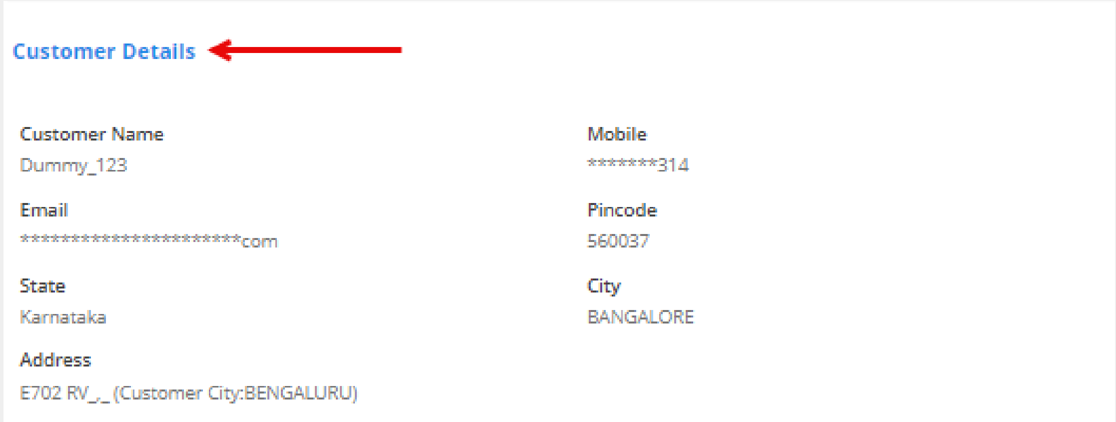


Figure: Customer Details

<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*.

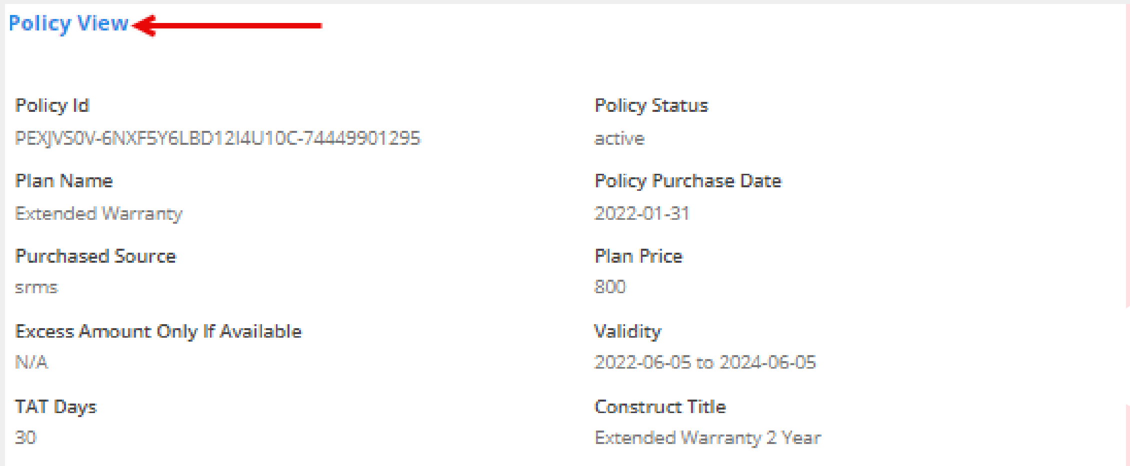


Figure: Policy View

<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*.

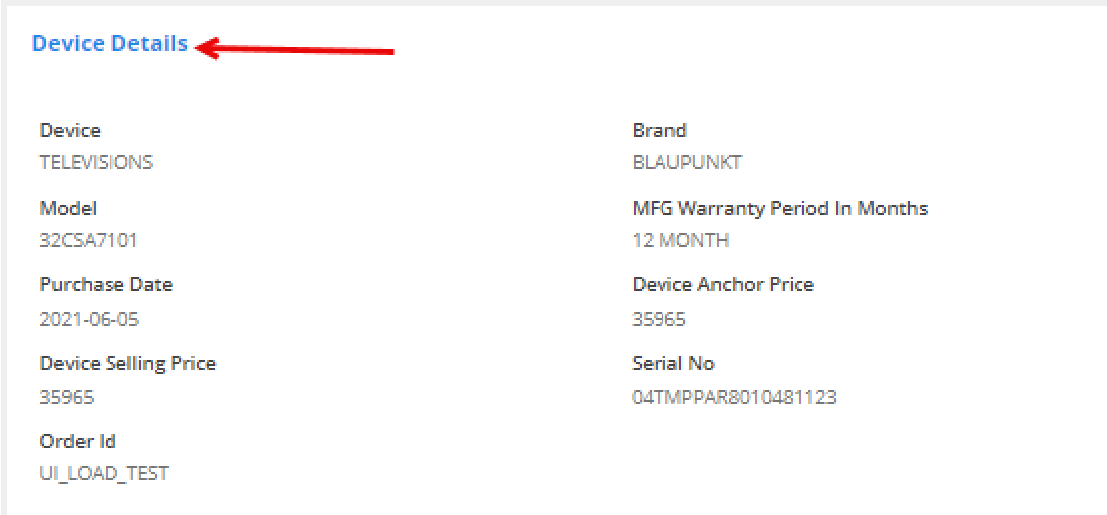


Figure: Device Details

<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.

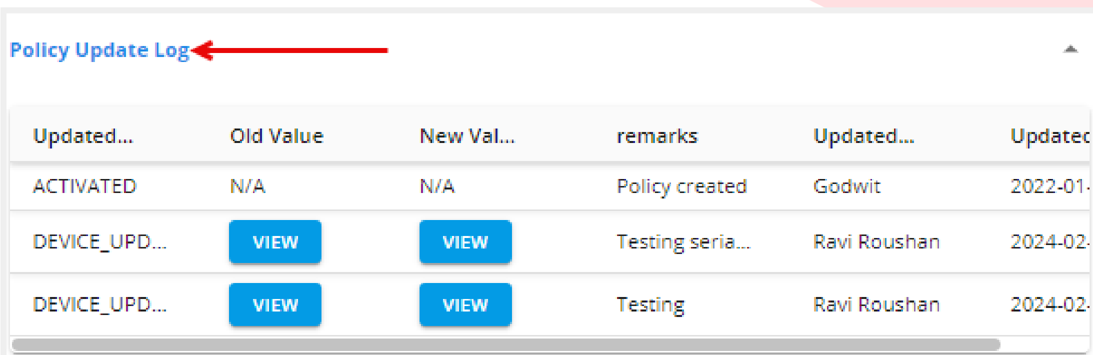
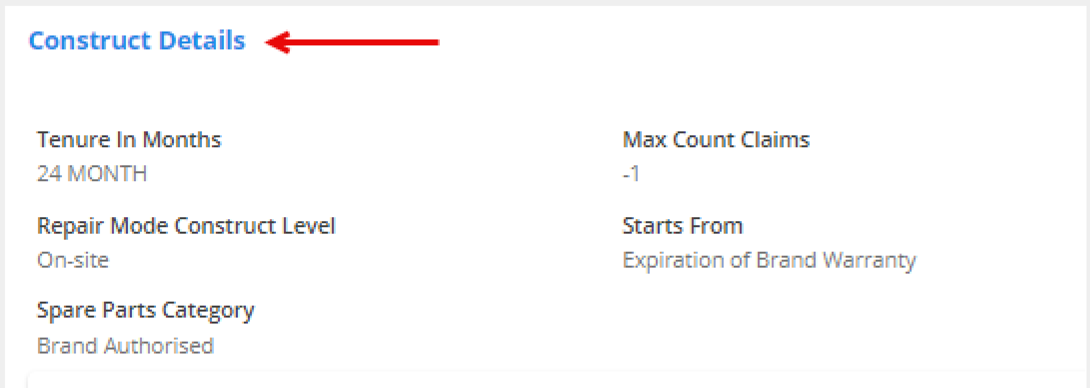


Figure: Policy Update Log

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*.

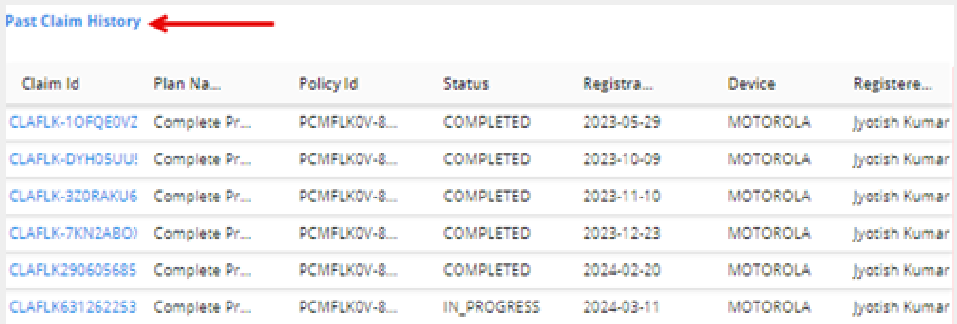


Construct Details

Field	Value
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.*

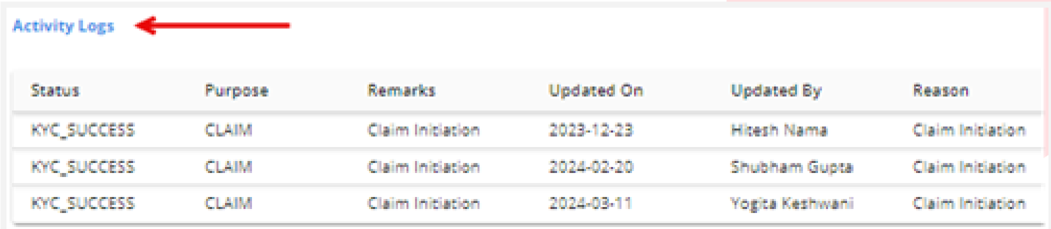


Past Claim History

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.*

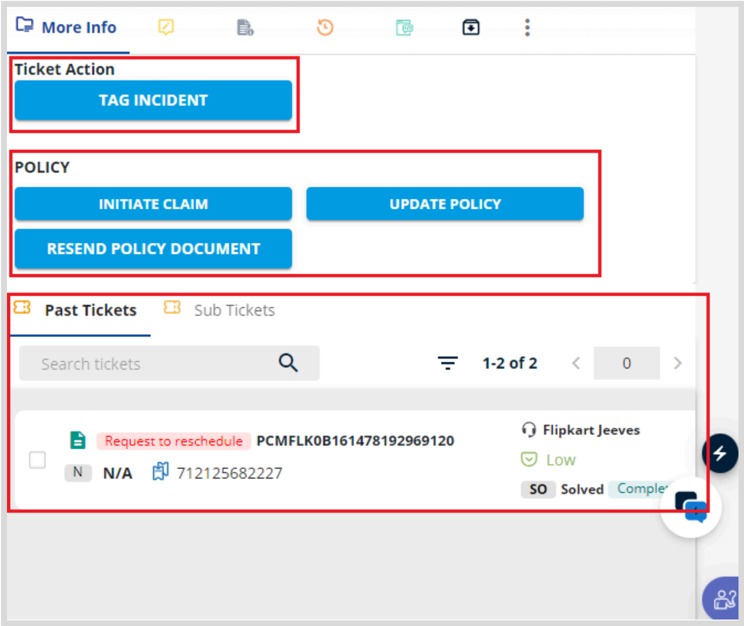


Activity Logs

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.

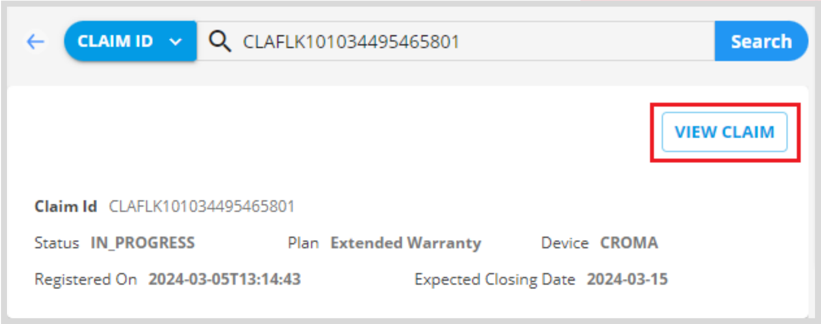


2. Claim Detailed View

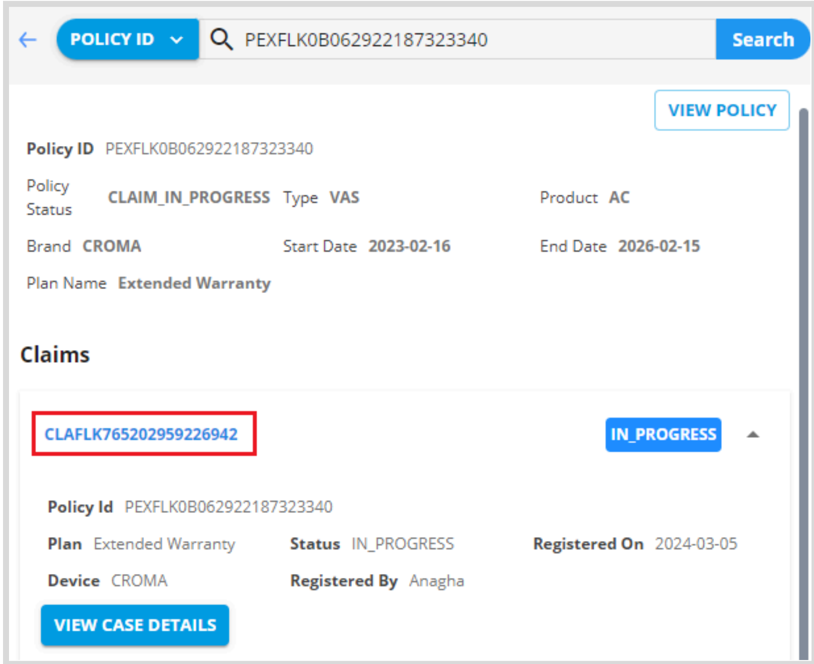
Claim Detailed View provides users with detailed information related to the claim associated with the policy purchased by the customer.

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

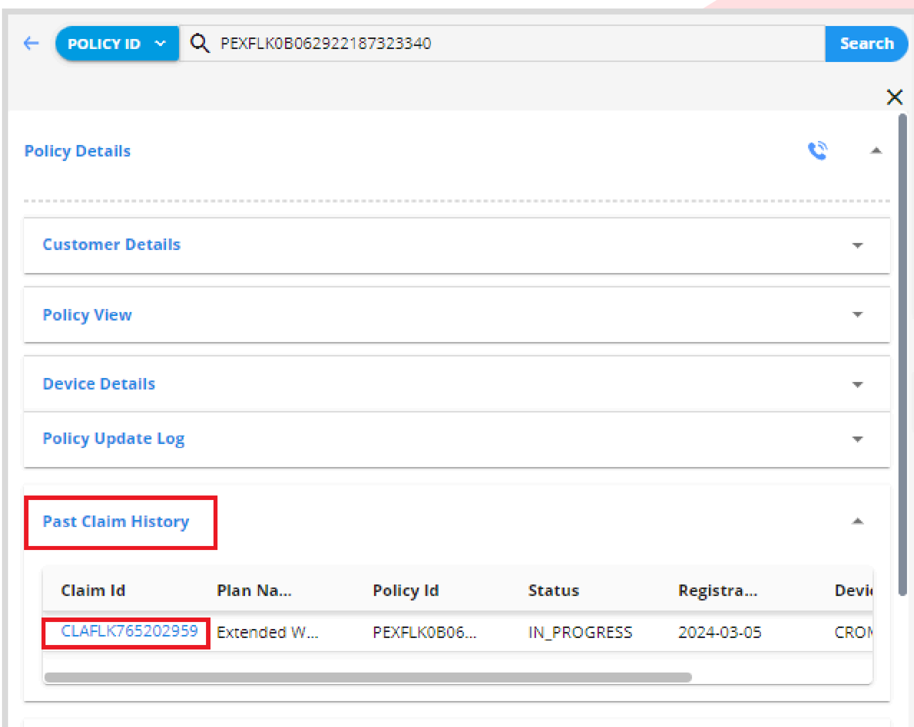
1. Clicking on the '**View Claim**' button within the claim listing section.



2. Clicking on the **Claim ID** within the policy listing section. This option will be available only when a claim is present for the 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.

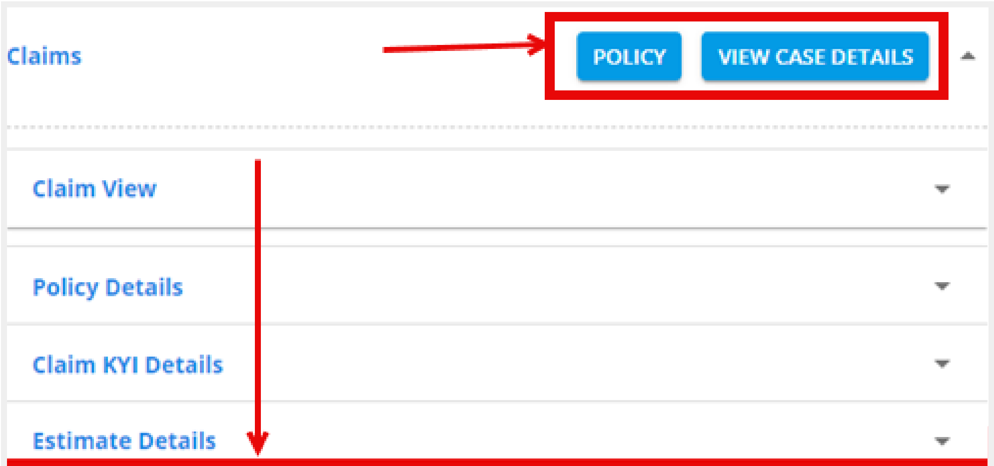


Figure: Claims Details

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).*

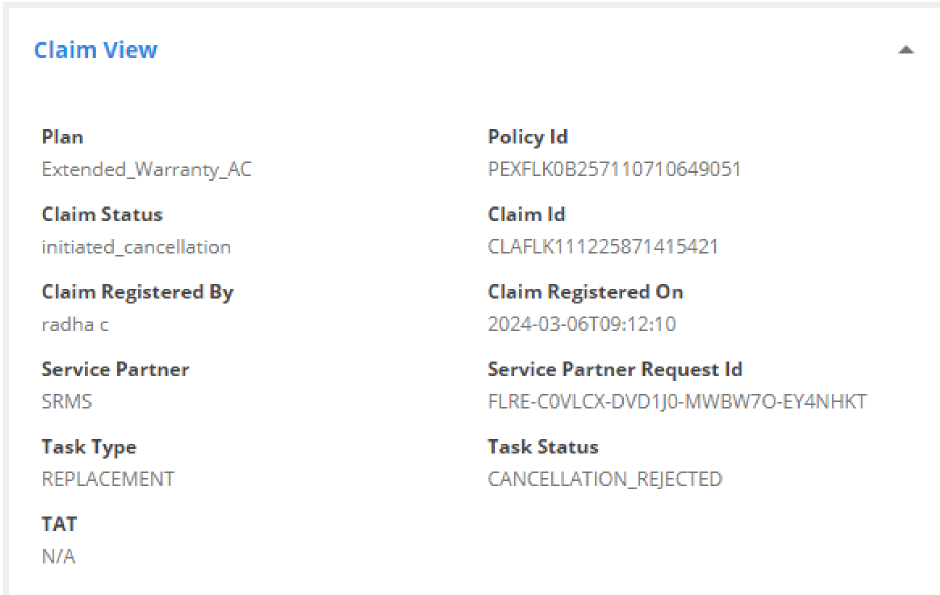


Figure: Claim View

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*.

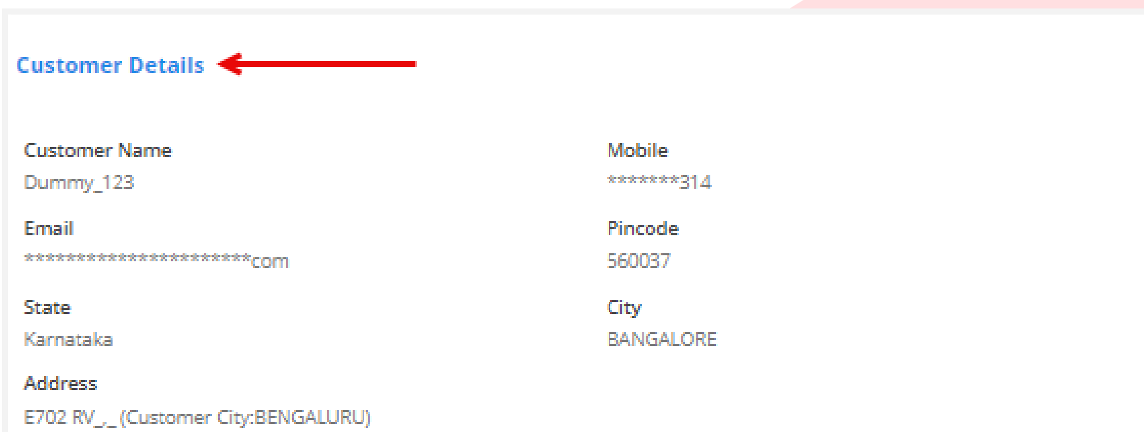
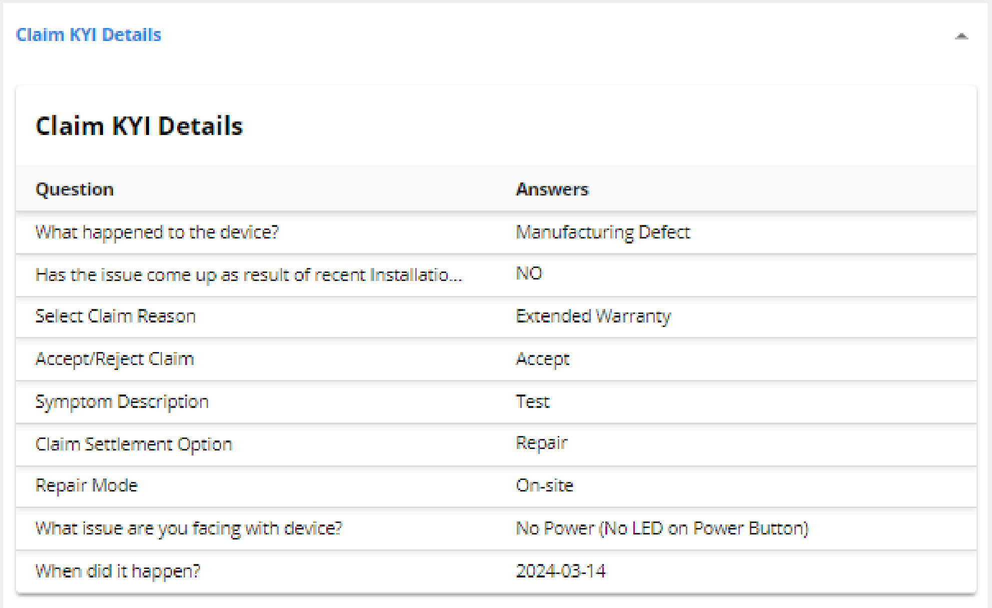


Figure: Customer Details

<u>Claim KYI</u>: 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.

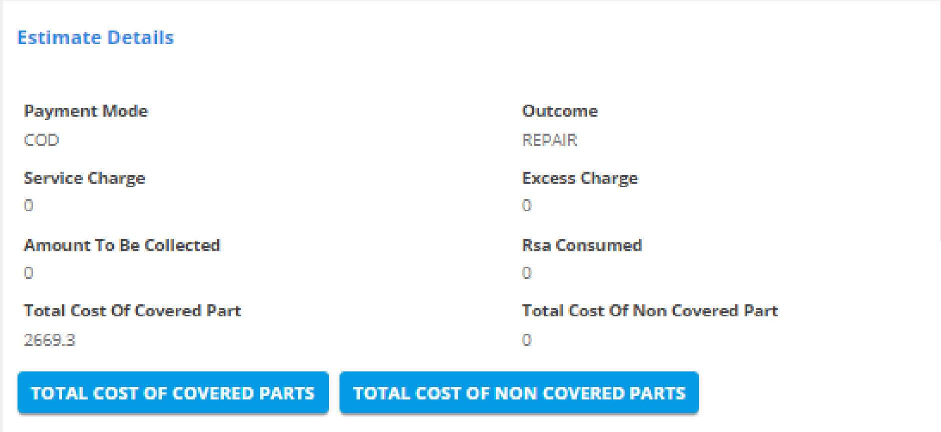


Figure: Estimate Details

UCP Process Refund Action: 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**
1	Yes
Remarks	**Payment Date**
Test	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.*

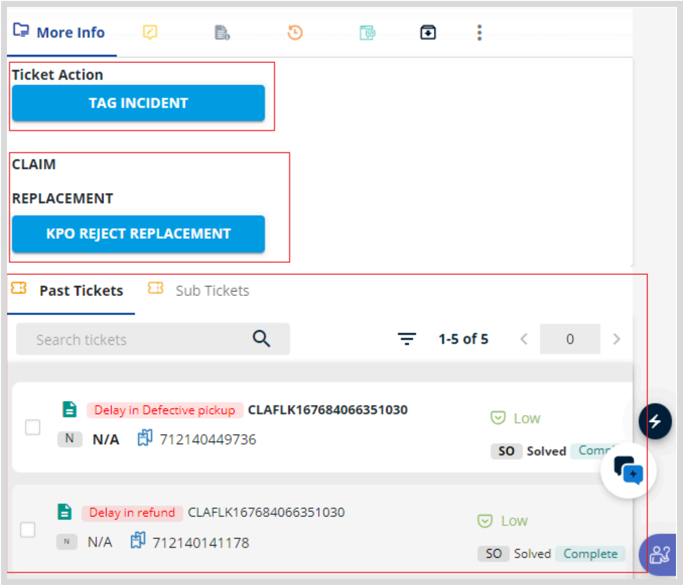
Claim Activity Logs

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.

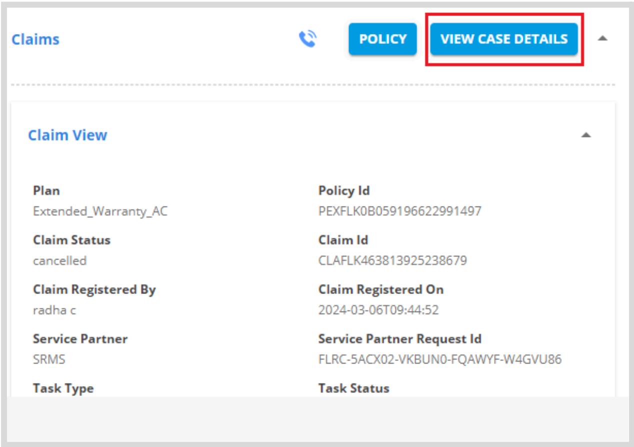
- On the right side of the claim detailed view, the agent will be able to access the available actions associated with the Claim, Kapture Ticket as well as the Past tickets associated with the claim.



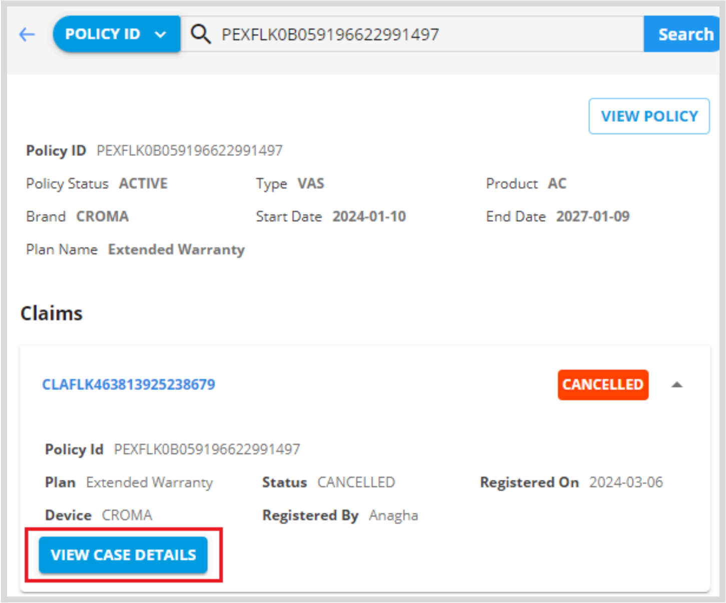
3. SRMS Case Details

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. 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.

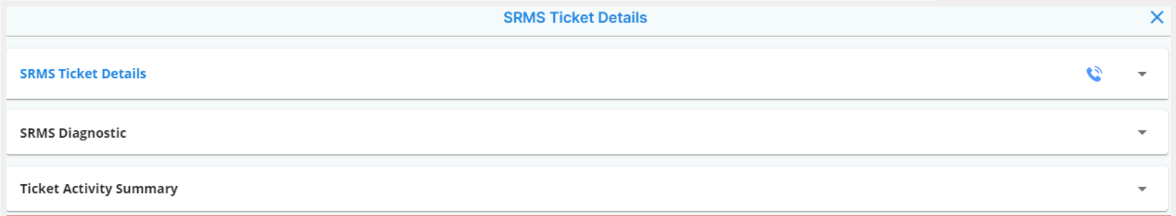


Figure: View Case Details_SRMS

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.*


SRMS Ticket Details

Case ID
FLRT-B483E1-TO8NPB-YIZJM6-HNE3GAL

Customer Name
Radha

Complaint Type
Repair

Status
Service Allocated

Sub Status
Without Parts

Provider
flipkart

SPD
21-03-2024, 12 AM- 11 PM

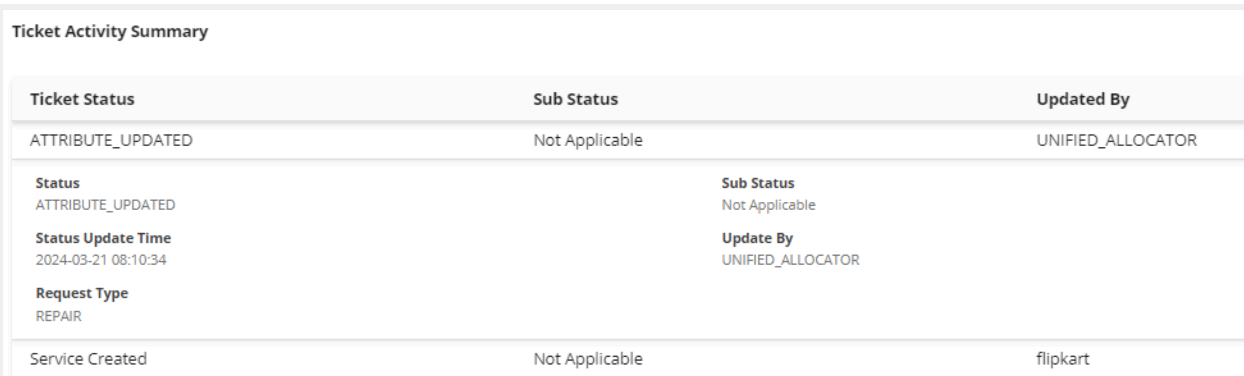
Reschedule Visit Date
Invalid date

Technician
DUMMY TECHNICIAN2 (5 * RATED)

Creation Date
19-03-2024, 05:28:19

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.


Ticket Activity Summary

Ticket Status	Sub Status	Updated By
ATTRIBUTE_UPDATED	Not Applicable	UNIFIED_ALLOCATOR

Status
ATTRIBUTE_UPDATED

Sub Status
Not Applicable

Status Update Time
2024-03-21 08:10:34

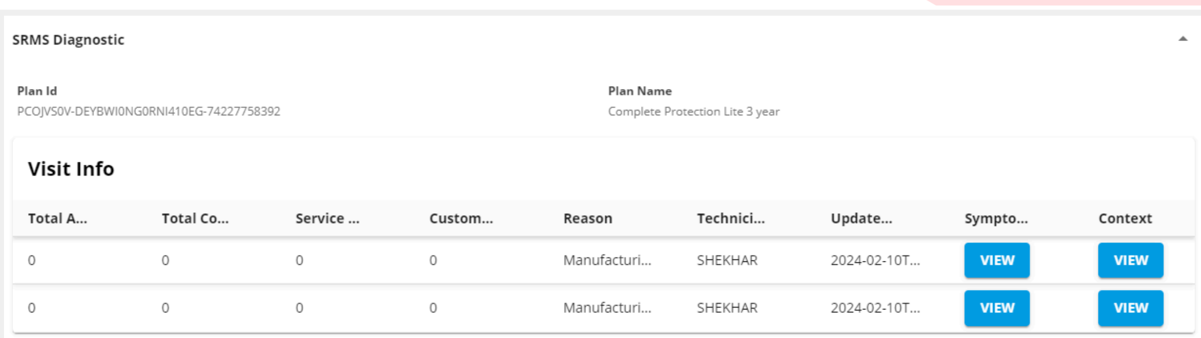
Update By
UNIFIED_ALLOCATOR

Request Type
REPAIR

Ticket Status	Sub Status	Updated By
Service Created	Not Applicable	flipkart

Figure: SRMS Ticket Activity

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


SRMS Diagnostic

Plan Id
PCOJVS0V-DEYBWI0NG0RNI410EG-74227758392

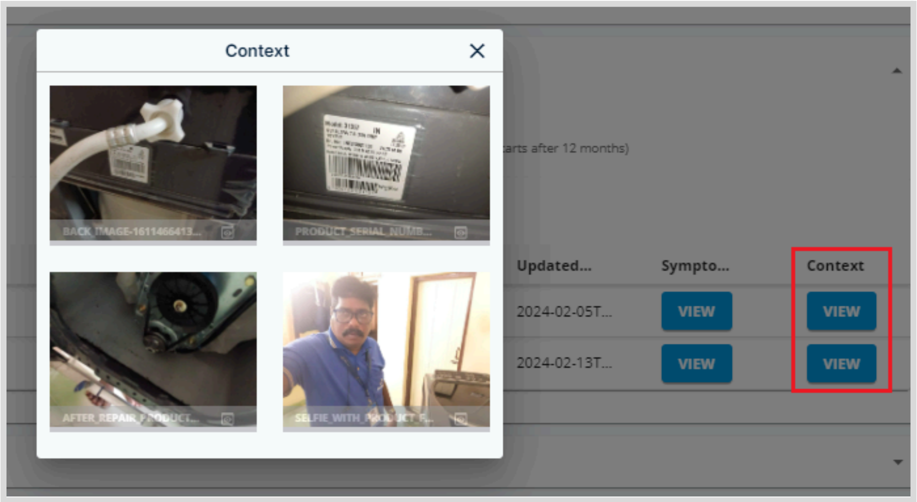
Plan Name
Complete Protection Lite 3 year

Visit Info

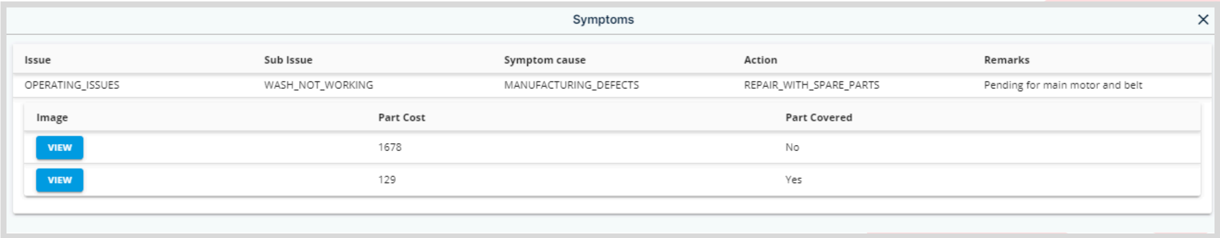
Total A...	Total Co...	Service ...	Custom...	Reason	Technici...	Update...	Sympto...	Context
0	0	0	0	Manufacturi...	SHEKHAR	2024-02-10T...	VIEW	VIEW
0	0	0	0	Manufacturi...	SHEKHAR	2024-02-10T...	VIEW	VIEW

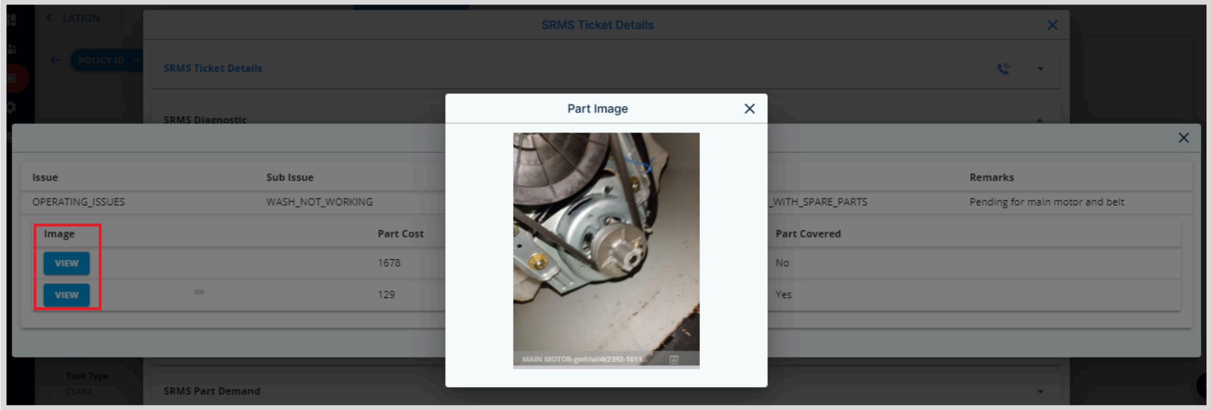
Figure: SRMS Diagnostic Information

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.





<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

RESEND INVOICE

Sales Order ID ORF1DMKZNP1J1X7H4XVVEQ8M3CKZN0	**Order Date** 2023-01-31T17:50:35
Technician ID S000122227	**Technician Name** NA
Payment Mode NA	**Total Amount** 550
Total Amount Payable 0	**Status** COMPLETED

Item Details

ItemName	SalesType	Quantity	UnitOfMeasurment	BasePrice	TaxRate	Tax	TotalAmount	AmountRecieved
REPAIR SERVICE	SERVICE	1	NOS	466.1	18	83.9	550	550

<u>SRMS Part Demand</u>: This section contains the Part demand details associated with the case.

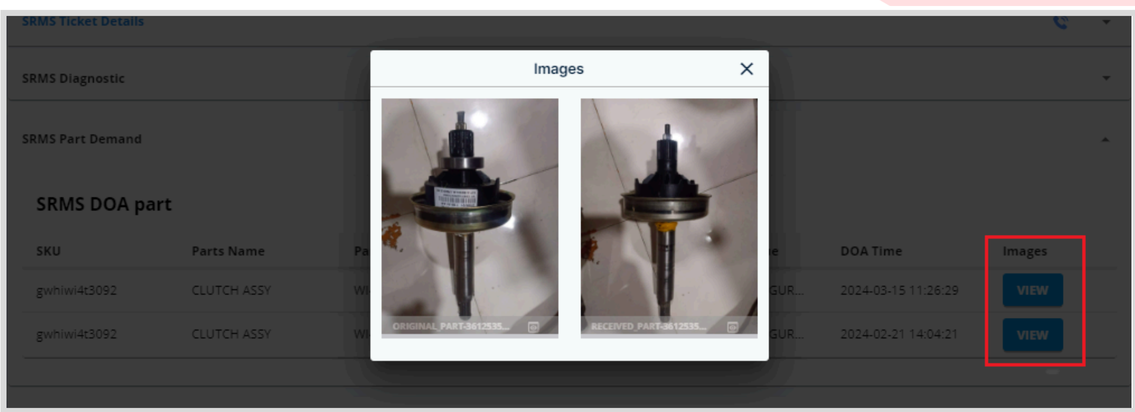
SRMS Part Demand

SRMS DOA part

SKU	Parts Name	Part Code	Primary Issue	Secondary Issue	DOA Time	Images
gwhiwi4t3092	CLUTCH ASSY	WI4TLWMLLLKOP8	WRONG_PART	WRONG_CONFIGU...	2024-03-15 11:26:29	VIEW
gwhiwi4t3092	CLUTCH ASSY	WI4TLWMLLLKOP8	WRONG_PART	WRONG_CONFIGU...	2024-02-21 14:04:21	VIEW

Figure: SRMS Part Demand

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



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**

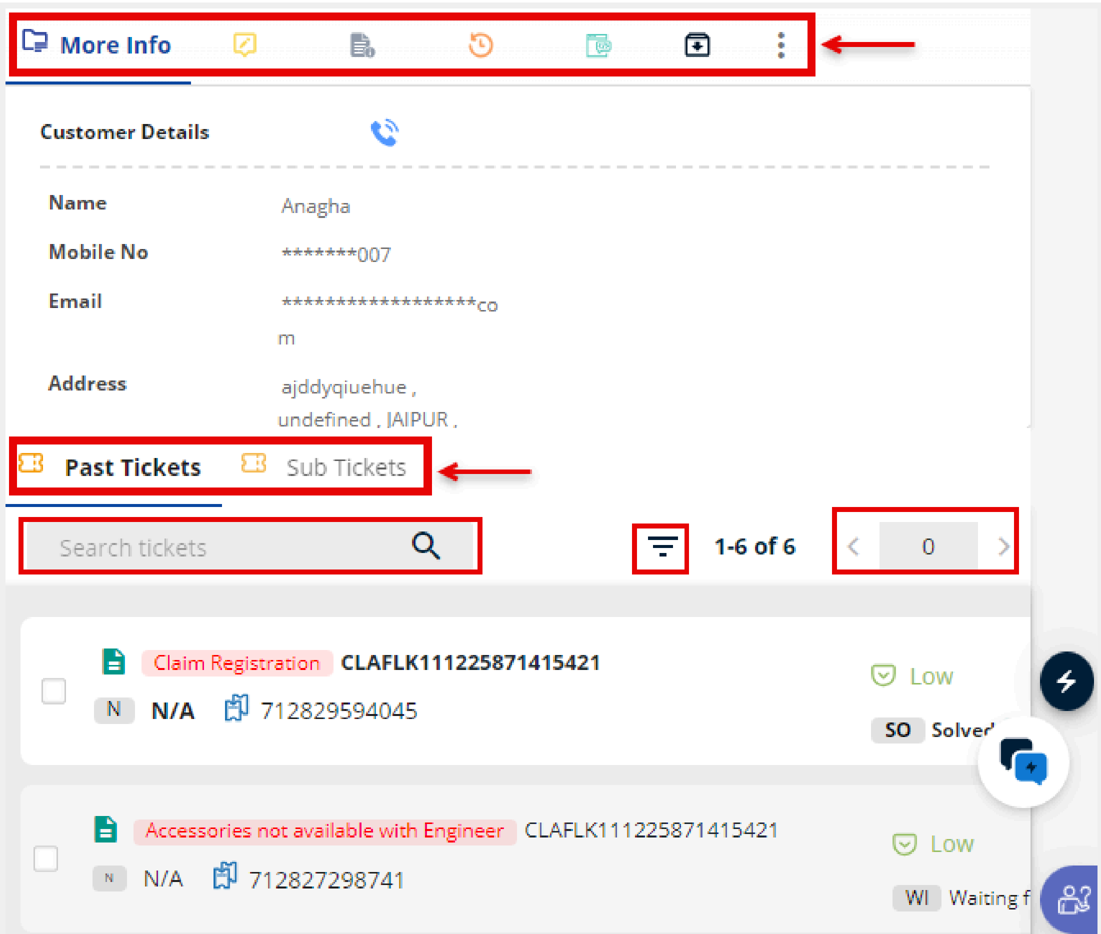
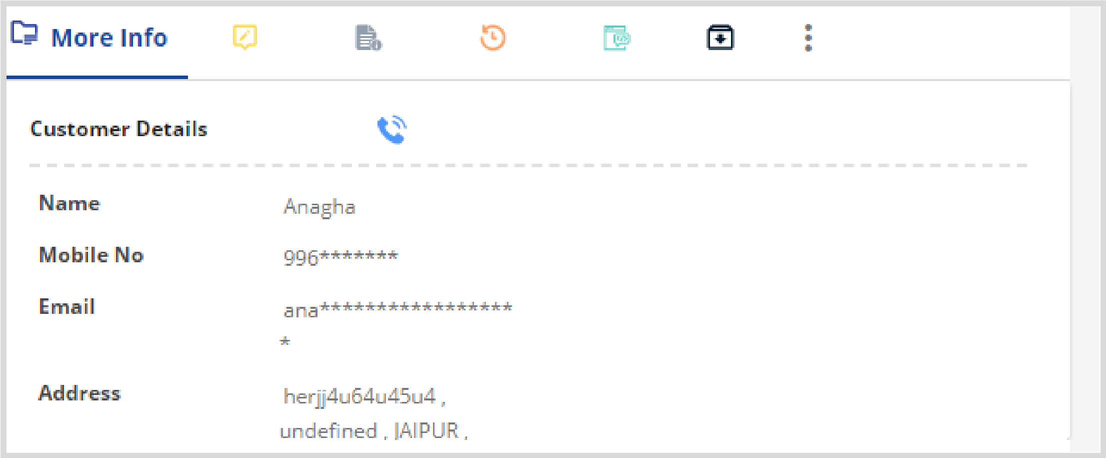


Figure: Options on the Right side of Ticket Page

More Info

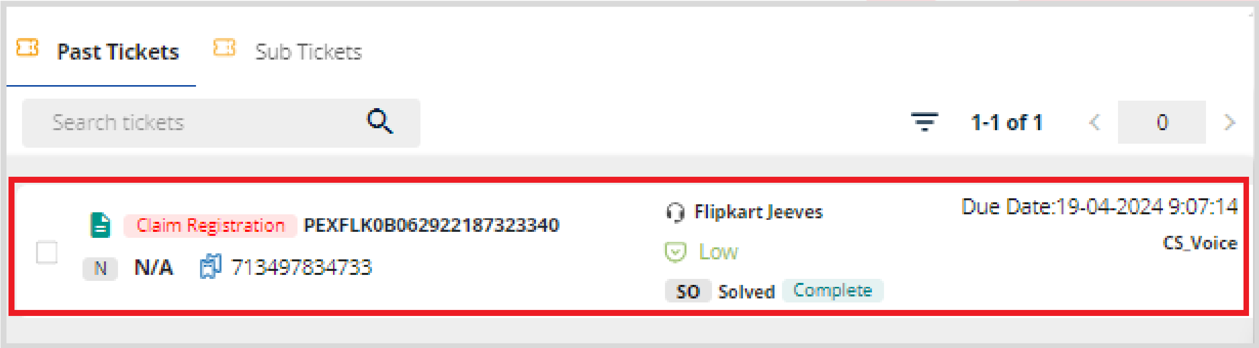
As implied by its name, the **Customer Details** tab provides information pertaining to the customer, including their **Name, Mobile Number, Email, Address, and SLA Status.**



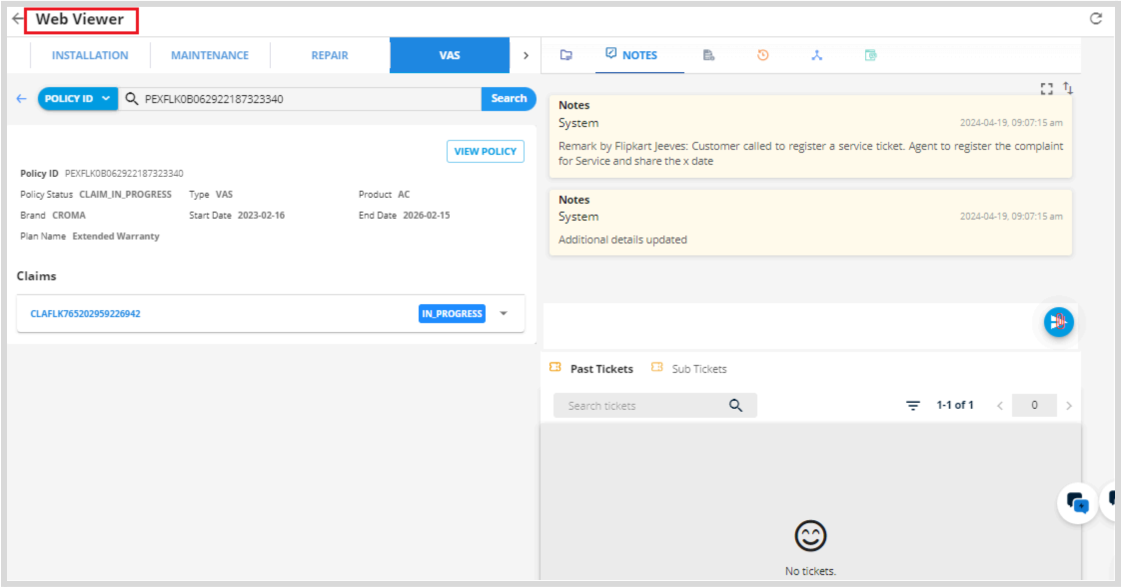
Past Tickets

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.

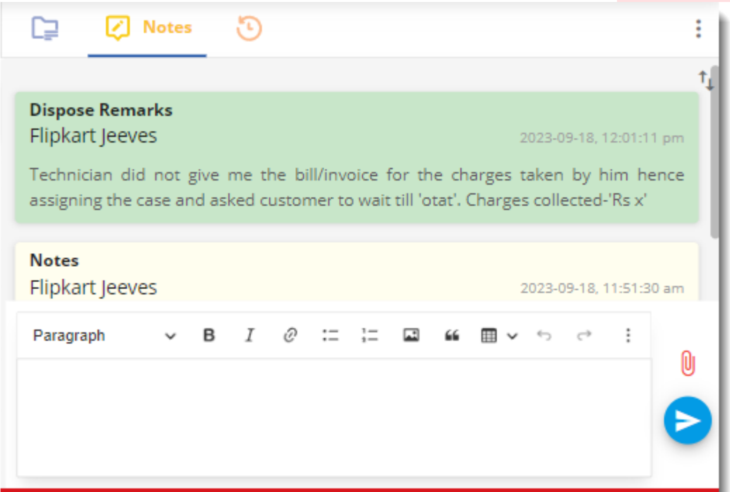


Figure: Notes