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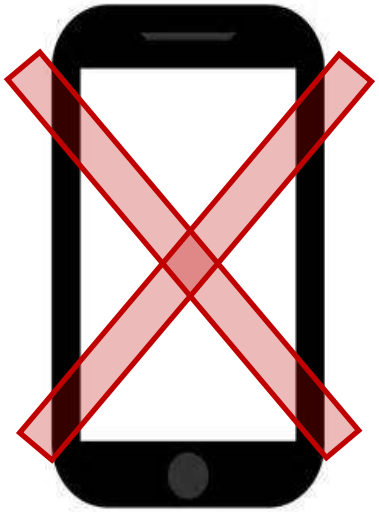
IMPORTANT !



WARNING!

Carrying or Using Mobile Phones On Floor Is An **PUNISHABLE OFFENCE**

SESSION OBJECTIVES

By session end you will be able to identify with:

1. **CRM Landing Page**
2. **CRM Landing Page – Various Sections**
3. **Locator Panel**
4. **Priority Search**

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CRM LANDING PAGE

When you receive a call, what details would you need?

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CRM LANDING PAGE

- ✓ CUSTOMER IS CALLING US FROM WHICH NUMBER ?
- ✓ WHO IS CALLING US, IS THIS A REPEAT CUSTOMER?
- ✓ CUSTOMER IS CALLING US FOR WHAT PRODUCT ?
- ✓ DO I NEED TO CAPTURE CUSTOMER'S ADDRRESS FOR ORDER?
- ✓ WHY CUSTOMER REFUSED TO PLACE ORDER?
- ✓ HAS CUSTOMER BOOKED ANY ORDER EARLIER?
- ✓ WHAT IS THE STATUS OF ORDER WHICH CUSTOMER PREVIOUSLY PLACED?

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CRM LANDING PAGE

➢ CRM Landing Page

CRM Landing page is the first Page you will interact with. It is used to search for or access customer details, we can also place orders and create Lead through this page.

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CRM LANDING PAGE

Product Search Panel | Web Search Panel | Order Panel | Lead Panel | Case Panel | Locator Panel

QUICK ACCESS: Shipping Address Order History Lead History Lead Panel

CALL DETAILS

Language: English / Call: Incomming

Lead Source / Publication: Web / Web Publication

Caller No: 8329912949 Add To Do Not Disturb

Name: PRASHANT MACHHI Diamond Member

Premium Customer

Available Naaptol Loyalty Points:2998

Diamond Member History

Profile Completion: 44%

Edit Profile

Gender: Male

PRODUCT SEARCH

Order Panel - Search Offers

Code

Search

Product Name

Search

Actual Call Date & Time : 27-Feb-2018 14:36:48

Select	Product Name	Deal Code	Offer Details	Qty	Value	Offer	Save	Shipping	Amount (Rs.)	Date

No Product Found.

ORDER PUNCH [CTRL + ALT + O]

LEAD PANEL [CTRL + ALT + L] TOP

PAST ORDER HISTORY [CTRL + ALT + H] TOP

PAST LEAD HISTORY [CTRL + ALT + P] TOP

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CRM LANDING PAGE

CAN YOU TELL .....

Who has called Naaptol?
Is this a fresh or repeat customer?
Through Which mode is customer calling us?
Which product can customer be interested in?

CALL DETAILS

Language: English / **Call:** Incomming
Lead Source / Publication: Web / Web Publication

Caller No: 8329912949 Add To Do Not Disturb
Name: PRASHANT MACHHI Diamond Member
Premium Customer
Available Naaptol Loyalty Points:2998
Diamond Member History

Profile Completion: 44%
Edit Profile
Gender: Male

PRODUCT SEARCH

Order Panel - Search Offers

Code | Search
Product Name | Search

Actual Call Date & Time : 13-Aug-2017 12:08:48

Select	Product Name		Deal Code	Offer Details	Qty	Value	Offer	Save	Shipping	Amount (Rs.)	Date	Size/Colour	Size/Class
◉	Ivoomi 4G Mobile with Gorilla Glass		5040		1		3499		Free	3499	Now	Black	
○	Set of 2 Jaipuri Silk Razai with Gold Prints		4023		1	6000	999	83%	Free	999	2 Hour Before	Red	
○	Juicer & Slicer Combo + 6 Glasses + Multi Cutter with Peeler		5026		1		999		Free	999	4 Hour Before	Yellow	

More +

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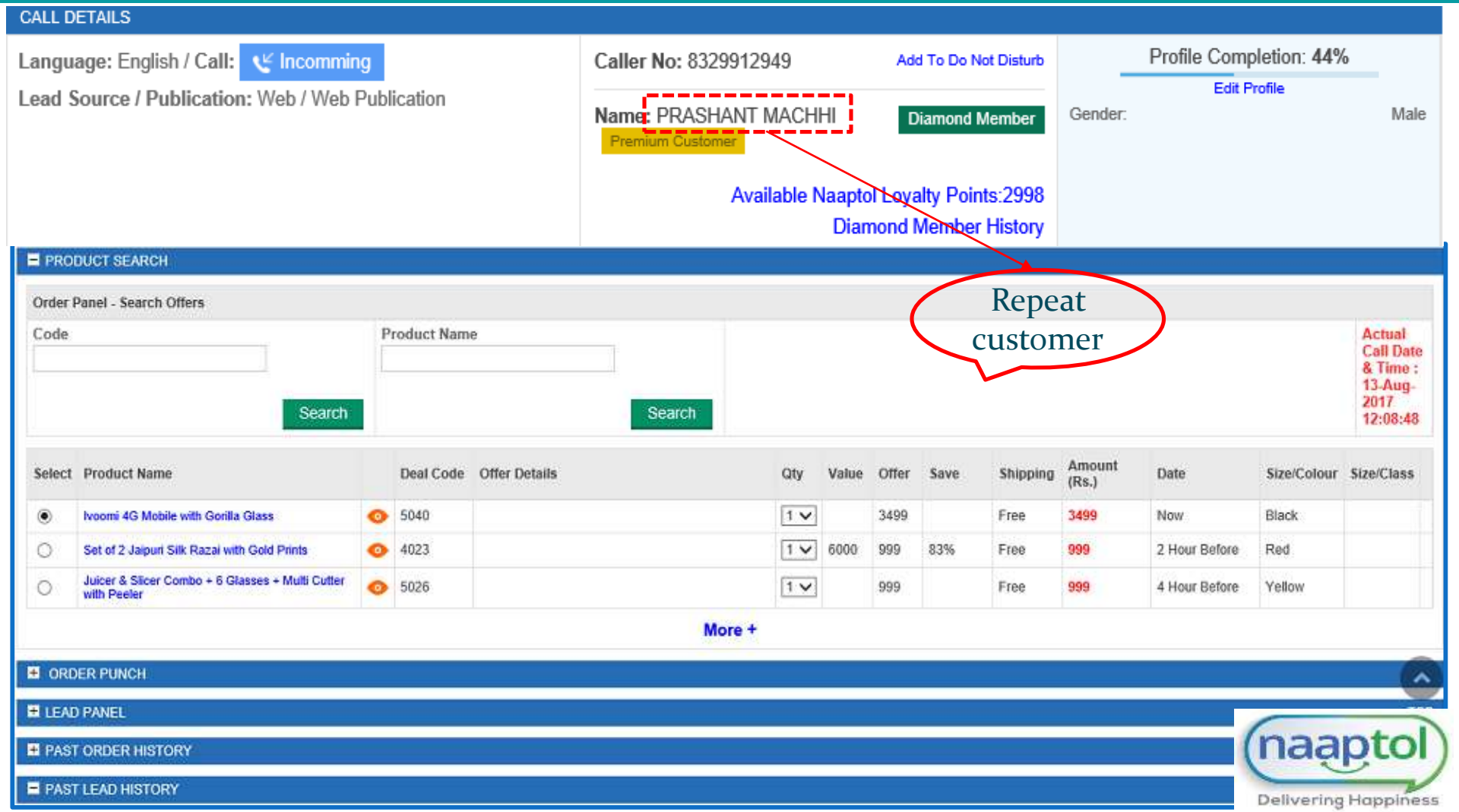
CRM LANDING PAGE : EXISTING CUSTOMER



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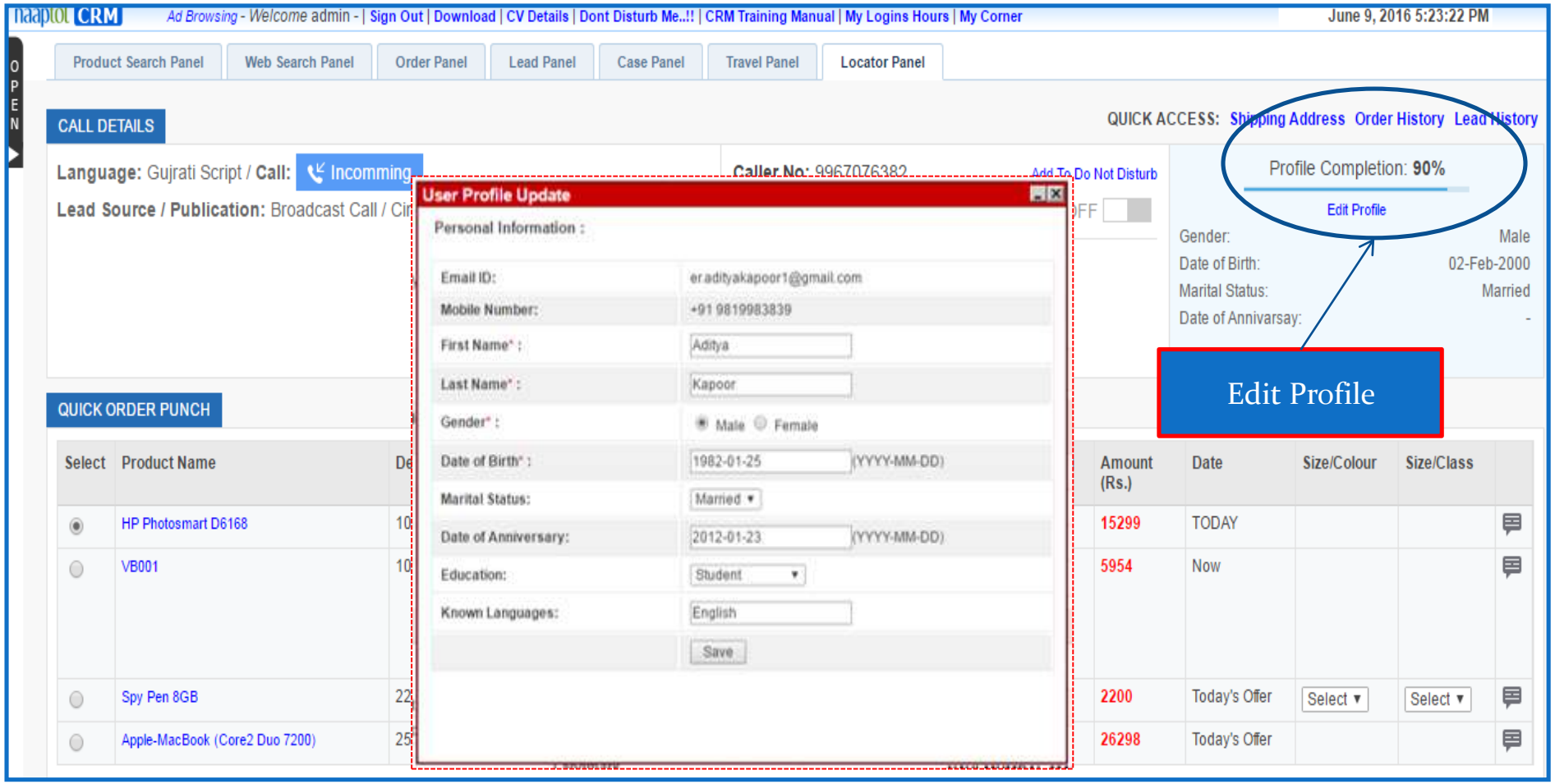
CRM LANDING PAGE: EDIT PROFILE



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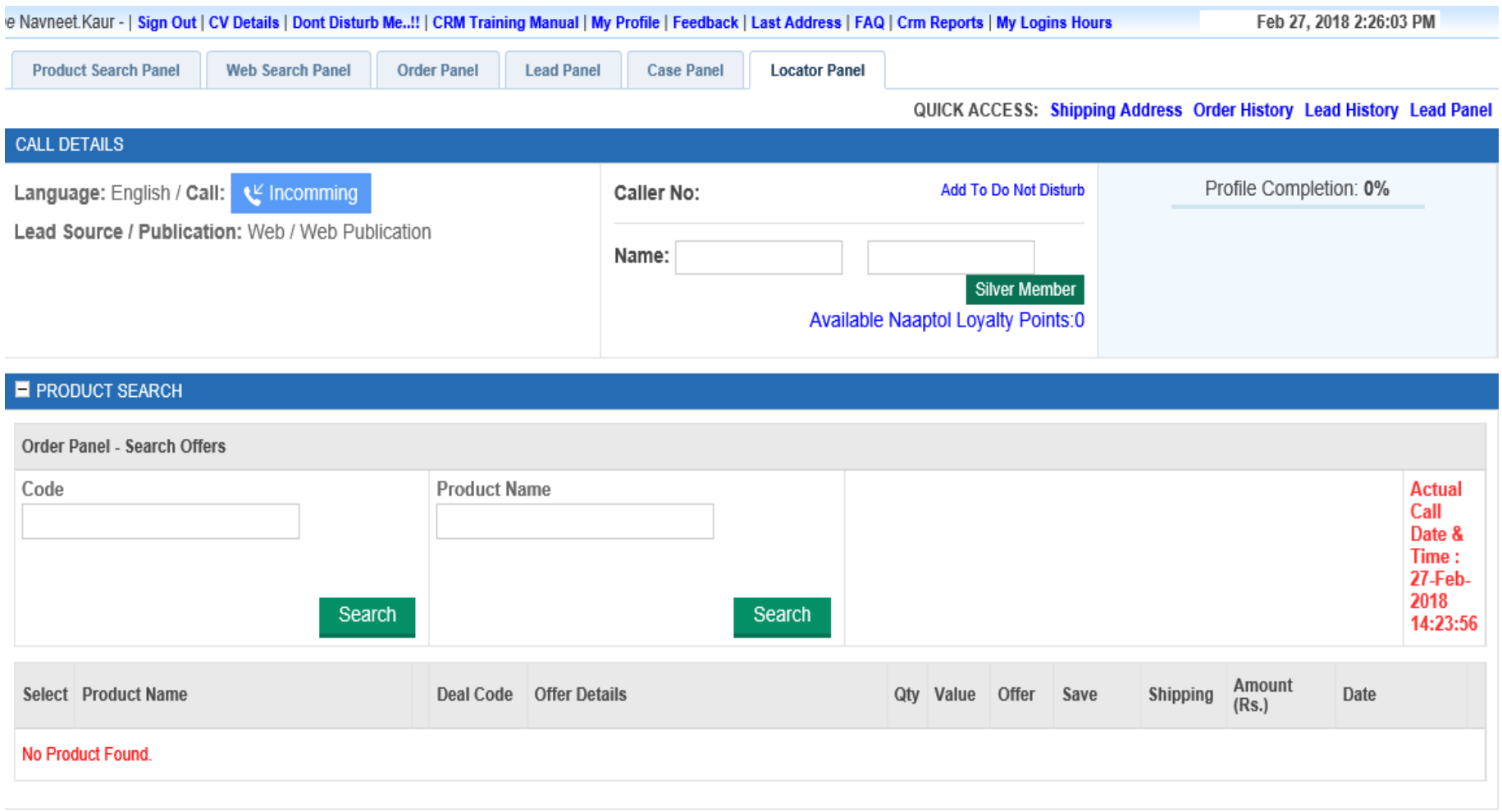
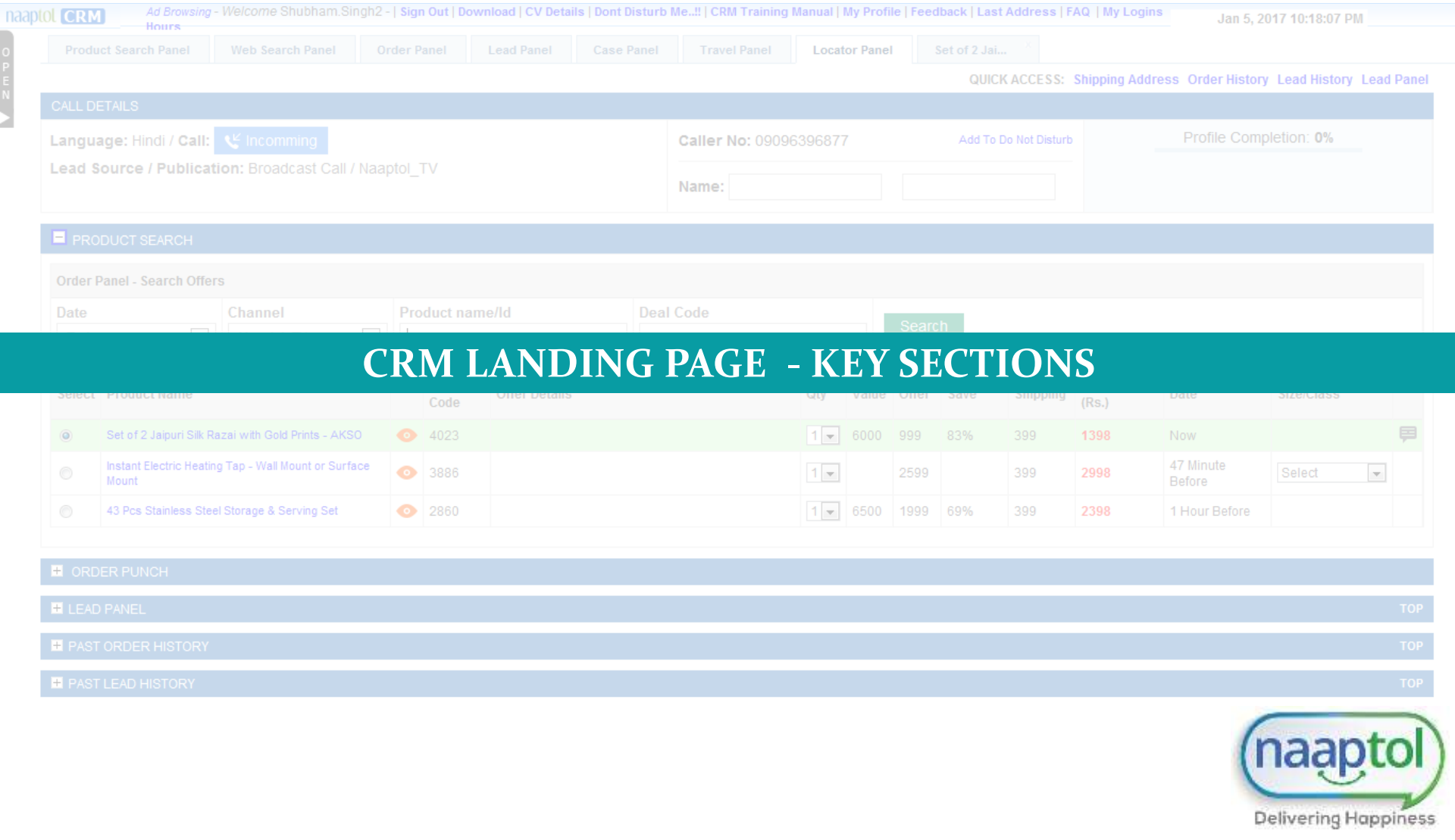
CRM LANDING PAGE: NEW PROFILE





CRM LANDING PAGE - KEY SECTIONS

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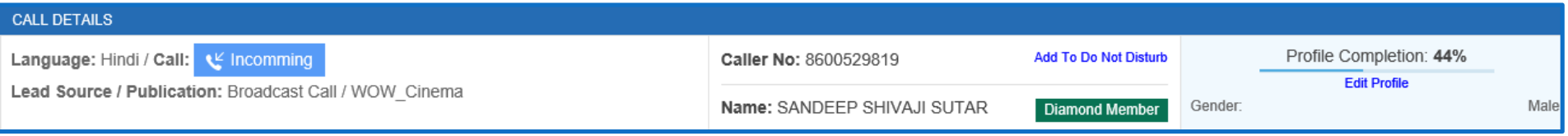
CRM LANDING PAGE – CALL DETAILS



Call Details

Call Details Section allows us to check customer's contact details (caller number) and customer's name, we can also check customer's profile details with the help of Call details Section. A Premium Customer means that customer is of high priority as he/she transact very frequently with Naaptol.

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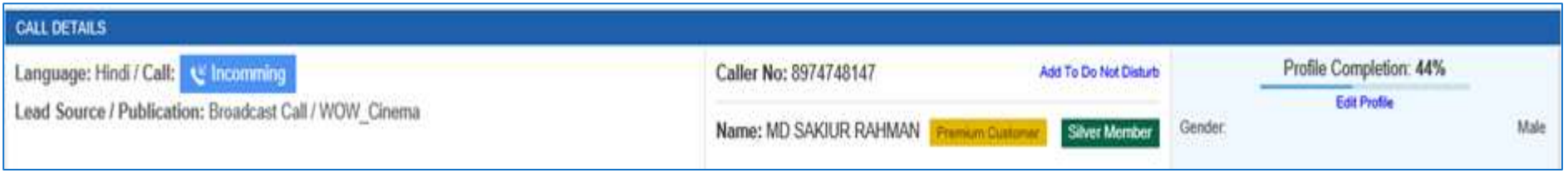
CRM LANDING PAGE – CALL DETAILS



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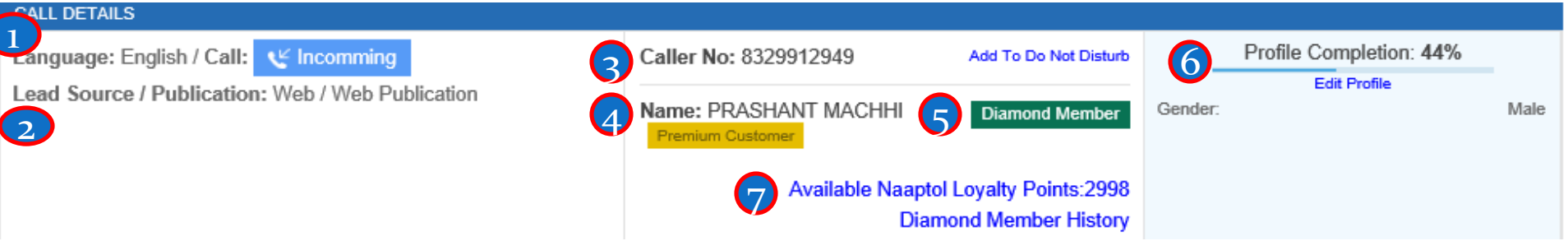
KEY SECTIONS : CRM LANDING PAGE – CALL DETAILS



Call Details

1. **Language / Call**: We can check customer's language which helps us initiating correct opening.

2. **Lead Source / Publication:** we can track name of the broadcasting channel or if customer is calling us referring our website or other source and we can also track the publication (Channel name).

3. **Caller Number :** Contact number of the customer.

4. **Name :** lets us know the name of our existing Customer.

5. **Customer Membership:** We have categorized customer into 2 categories (Silver and Diamond Members)

6. **Profile Completion:** We can also track/update customer's Profile.

7. **Available Loyalty Points:** We can also check the customer's Naaptol Loyalty Points

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CALL DETAILS

Language: English / **Call:** Incomming

Lead Source / Publication: Web / Web Publication

Caller No: 8329912949 Add To Do Not Disturb

Name: PRASHANT MACHHI Diamond Member

Premium Customer

Available Naaptol Loyalty Points:2998

Diamond Member History

Profile Completion: **44%**

Edit Profile

Gender: Male

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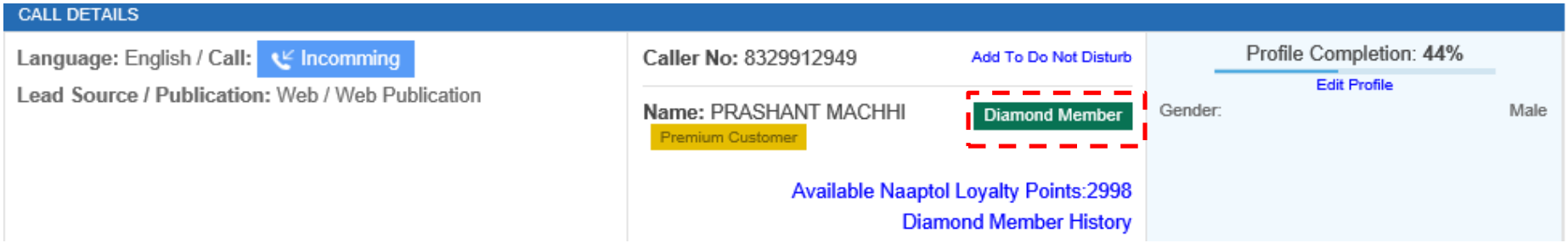
KEY SECTIONS : CRM LANDING PAGE – CALL DETAILS

A Diamond member is…

- The one who has shopped Rs 15000 or subscribed our membership in Naaptol.



A Diamond member gets…..

- One year free shipping.
- Loyalty points equivalent to the product purchased.
- Multi Brand Discount coupon on every shopping.
- Priority customer service for shopping and delivery.
- 500 Loyalty points on special events like Birthdays and Anniversary .
- A Silver customer can easily be converted into a diamond member by just Paying 599.

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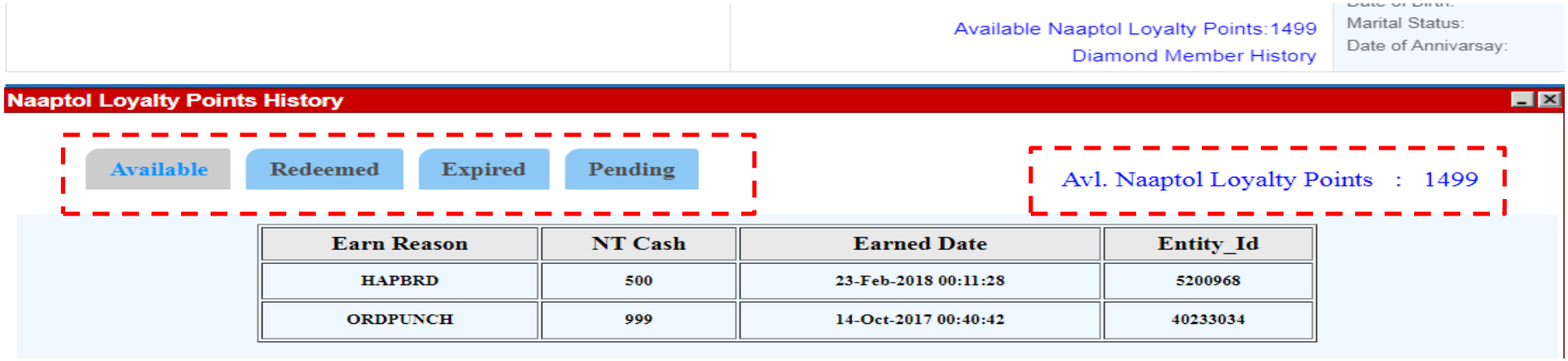
KEY SECTIONS : CRM LANDING PAGE – CALL DETAILS

Available Loyalty Points

We can check the customer's Loyalty Points through this link.
Further it has 4 sub links to check the details-

1. Available
2. Redeemed
3. Expired
4. Pending



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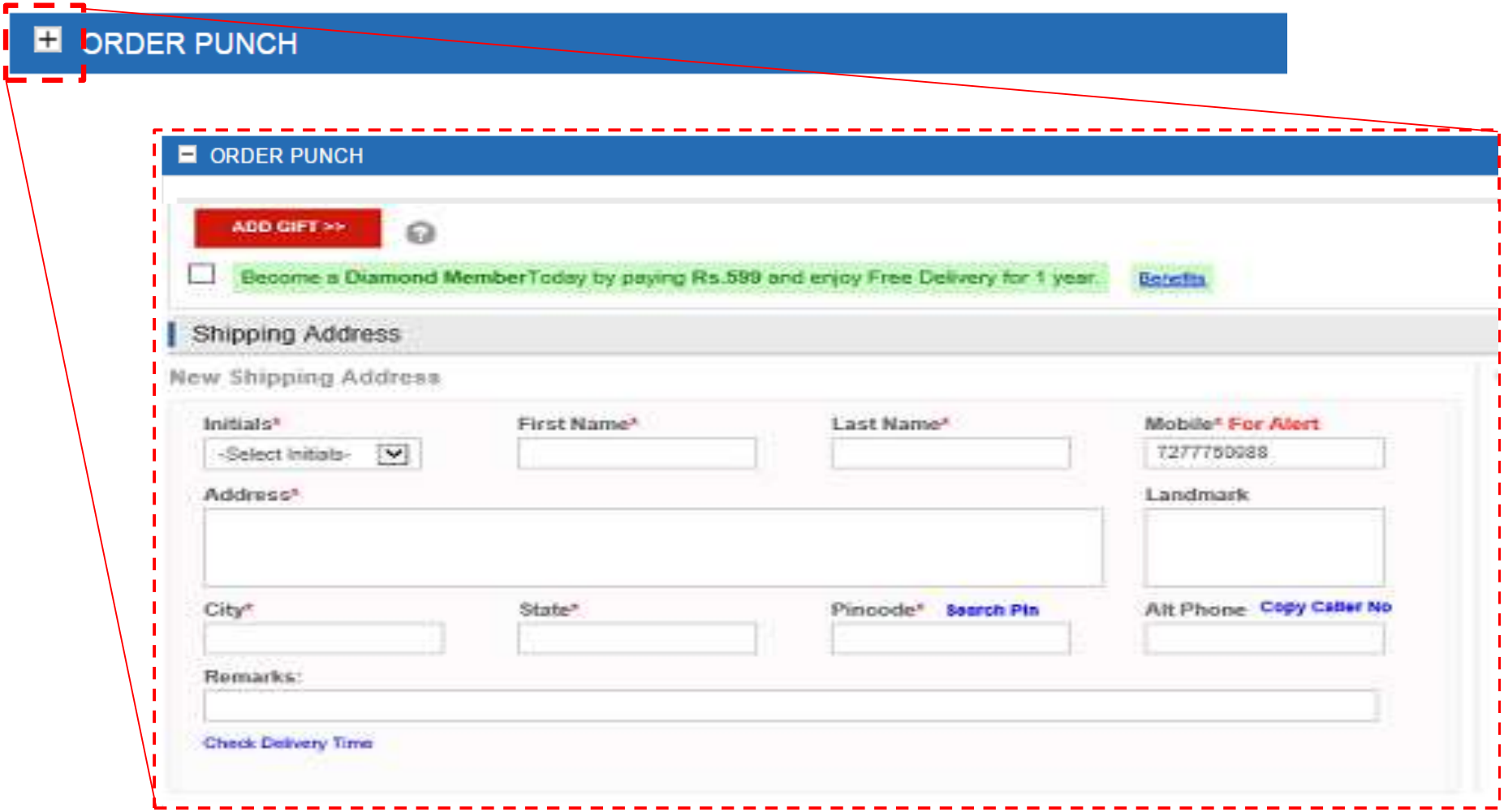
EXPANDABLE SECTIONS



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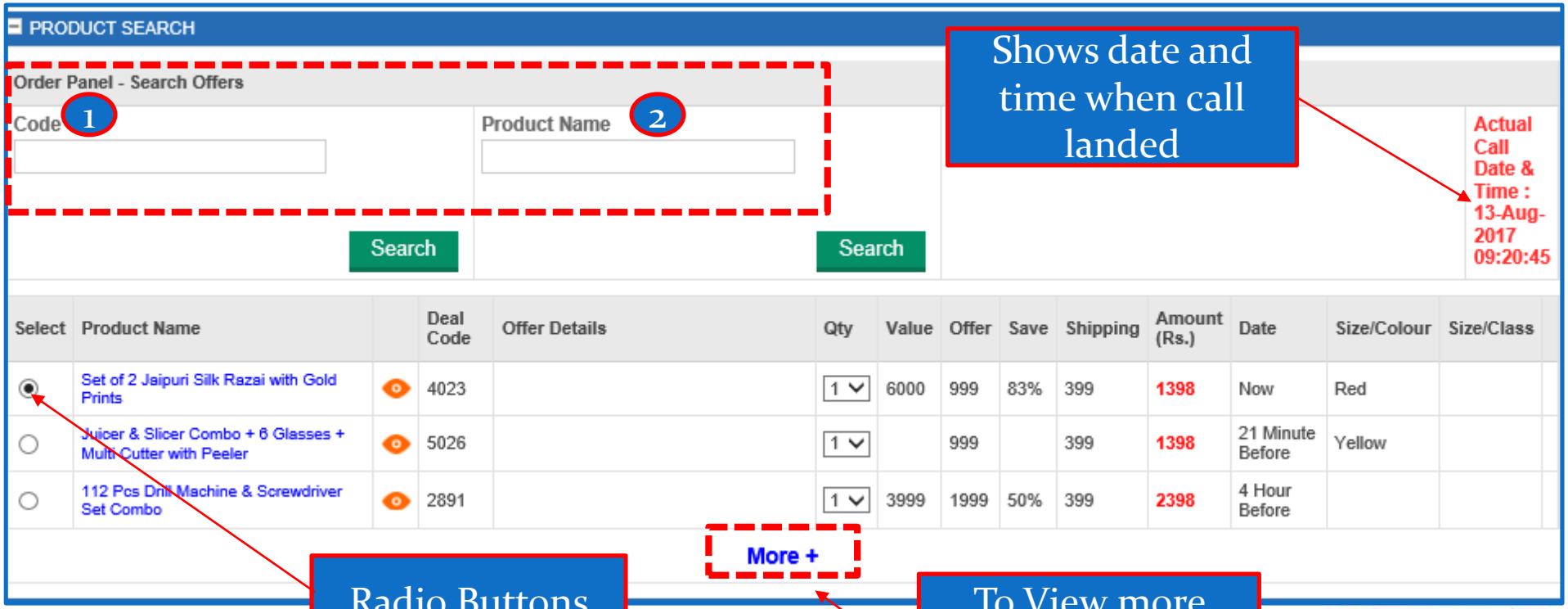
CRM LANDING PAGE – PRODUCT SEARCH

- **Product Search:** This section can be used to search/select product for the customer, we can select product with the help of radio buttons and also can track the product with help of Code and Product Name fields.



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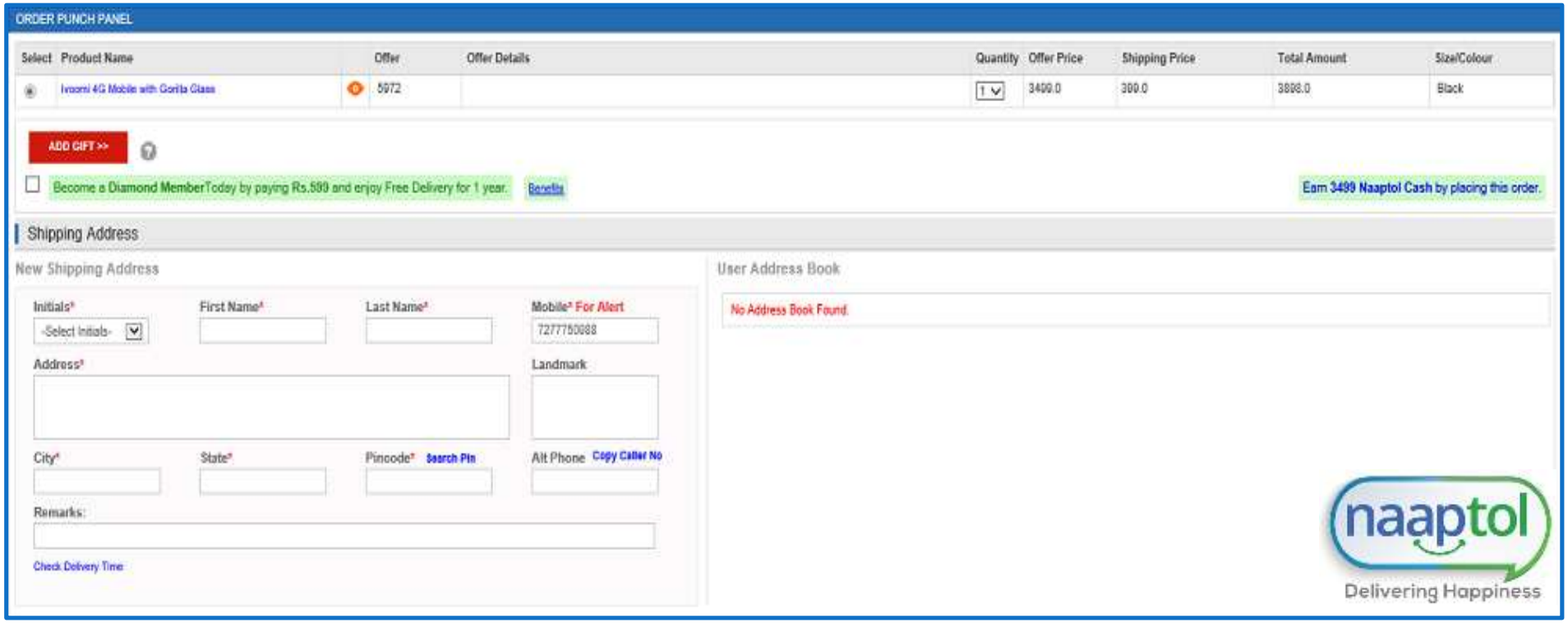
CRM LANDING PAGE – ORDER PUNCH

ORDER PUNCH

This section reflects Order Form details like Name, Address and Other relevant details required to place a order , Also quick order punch is the most convenient way to place order for the customer.



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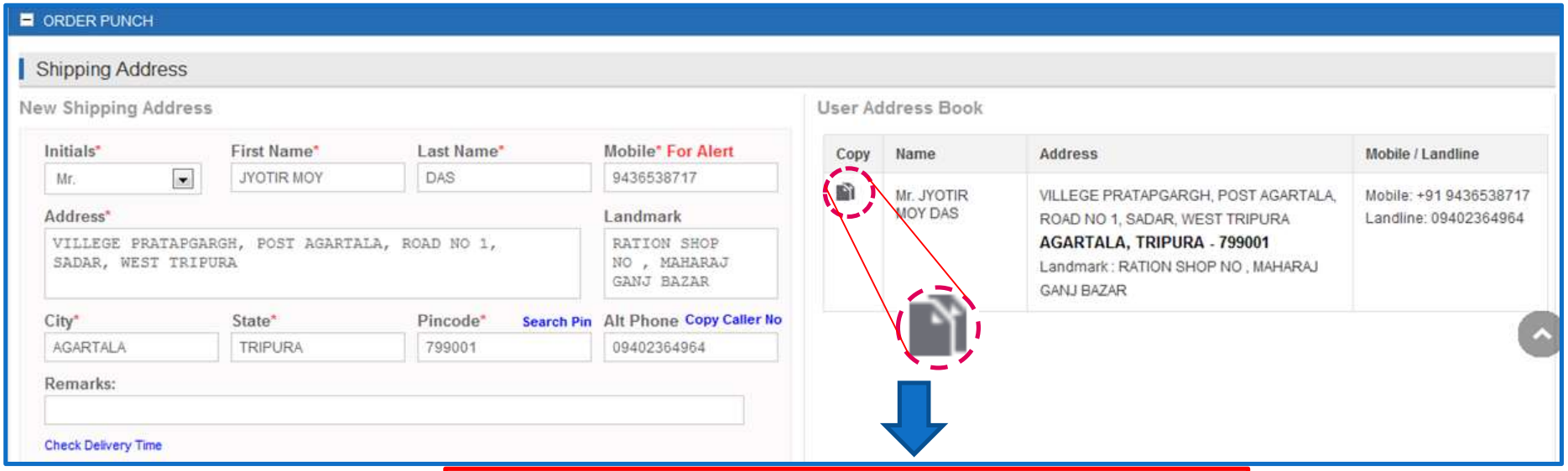
CRM LANDING PAGE – ORDER PUNCH – USER ADDRESS BOOK

User Address Book:

- ✓ This section helps us to copy customer's address in one single click Which is Convenient and the easiest way to capture the address.



User Address Book : If the user is registered user and have address book. The address book can be copied for user address booking.

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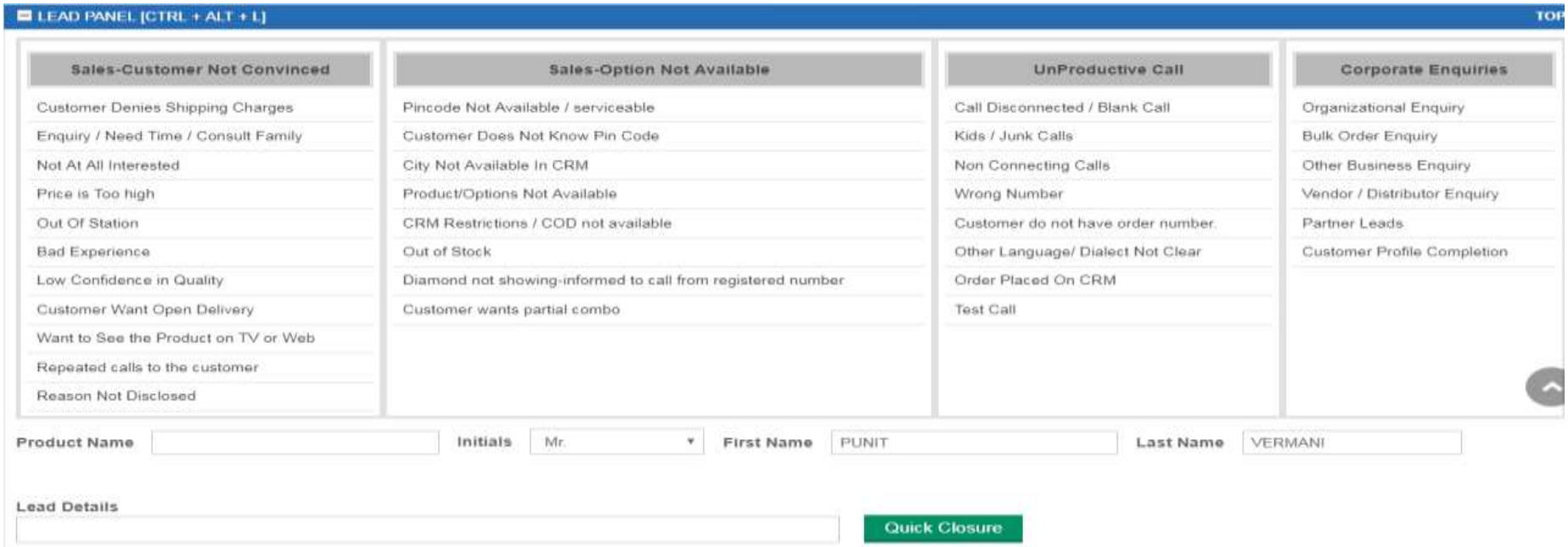
CRM LANDING PAGE – LEAD PANEL

LEAD PANEL

Quick Lead Panel lets us lodge Pre-Sale contacts on our CRM , Wherein Customers contact us for enquiries about Products and services offered.



Product Name will automatically get captured while routing the page from PDP or by clicking on Product Radio Buttons.

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CRM LANDING PAGE – PAST ORDER HISTORY

Past Order History:

Reflects all previous orders placed by customer and order related brief summary. You can click on Order Number to access detailed information..

Order Number

PAST ORDER HISTORY TOP

Order No	Copy	Order Date	Shipping Name	Product Name	Price	Payment Mode	Order Status	Vender CRM	Complaint Details	Delivery Issue
26310755		29/08/2016	JYOTIR MOY DAS	Maahika Jewellery Collection	1398	Cash on Delivery (COD)	Order Cancelled	NO	View Complaint	Delivery issue
15477237		05/07/2015	JYOTIR MOY DAS	Body Massager Cum Fat Burner	1798	Cash on Delivery (COD)	Order Delivered	NO	View Complaint	

View Complaint

Complaint Details:

Complaint Details gives us the quick access to customer's Complaint, Wherein we can check the complaint status

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CRM LANDING PAGE – PAST LEAD HISTORY

PAST LEAD HISTORY

Reflects previously created Leads for the customer

PAST LEAD HISTORY

Lead No	Copy	Fname	Lname	Created On	Lead Type	Product Title	Lead Query	Feedback Type	Lead Status	Lead Disposition
101560240		MARIYAMMA	DOLLAMMA	29/08/2016	Order Already Placed	Maahika Jewellery Collection	151256->HYD4738->29/08/2016 12:34->ORDER ALREADY PLACED	-	Close	Order Placed On CRM

With the help of this section we can track the summary of last customer interaction.

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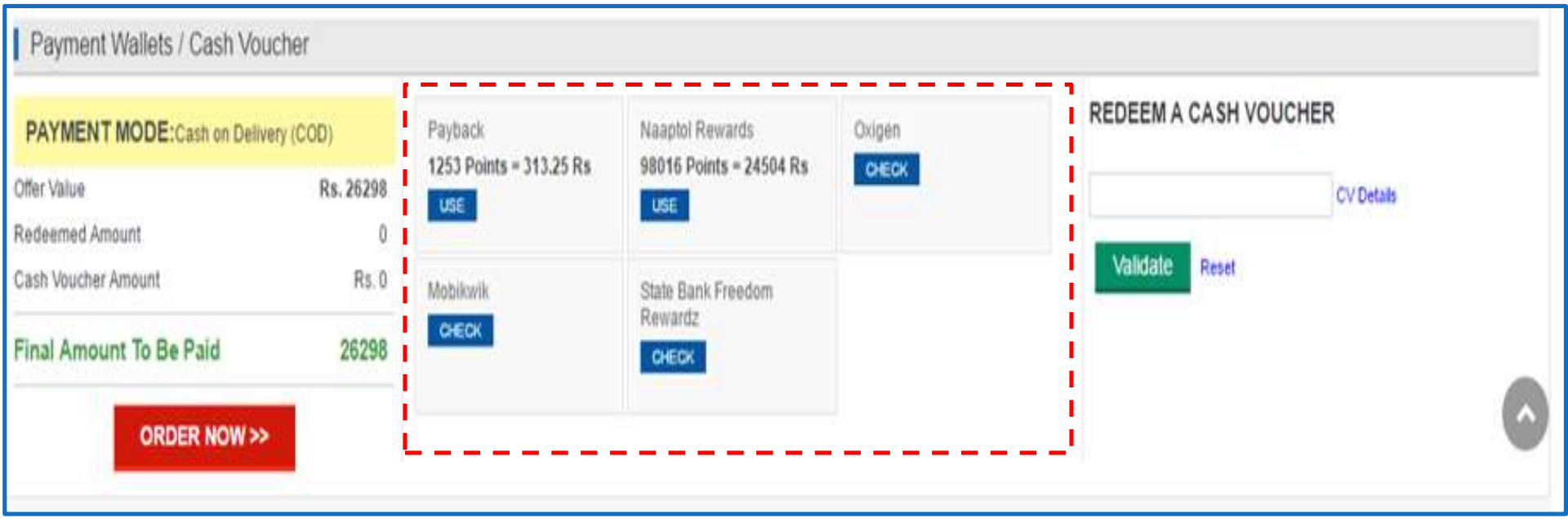
VIRTUAL WALLETS



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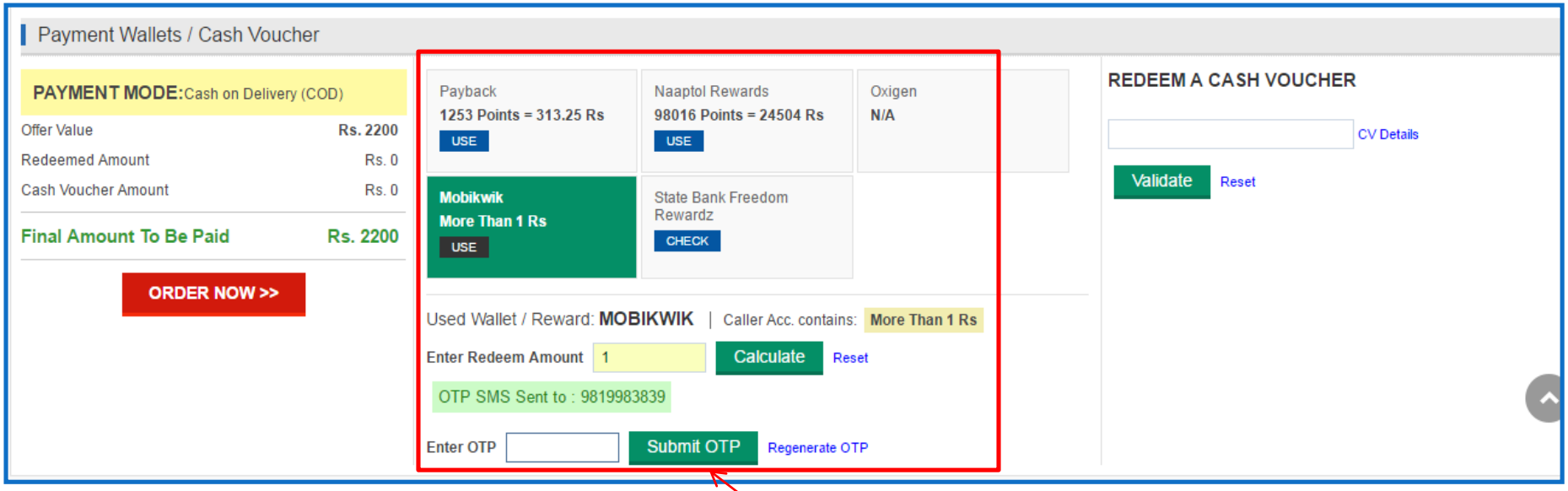
VIRTUAL WALLETS



In case of OTP the OTP is to be submitted .
Regenerate OTP options also allows the agent to resend a new OTP to the customer .

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NAAPTOL – LOCATOR PANEL

PANEL OVERVIEW

Locator Panel is the first panel you will interact with. As name suggest Locator is used to search for or access customer details.

This panel has various options which can be used to input details and search for a specific customer.

- ✓ It automatically picks up the number from which customer is contacting us and pops up the relevant details accordingly.
- ✓ This is the first screen you will encounter in CRM when customer's call will connect.

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LOCATOR PANEL

SEARCH A CUSTOMER

Usually, Locator Panel captures automatically captures & displays details for the number from which customer is calling us.

However there will be occasions when customer is giving us a follow up call regarding order/ complaint already placed but this time he/she is using a different contact number.

Number A

Customer called from this number to book his order.

Number B

Customer is now calling from this new number and asking for order details.

Under such circumstances we have to search customer's correct details under which previous contact has been registered.

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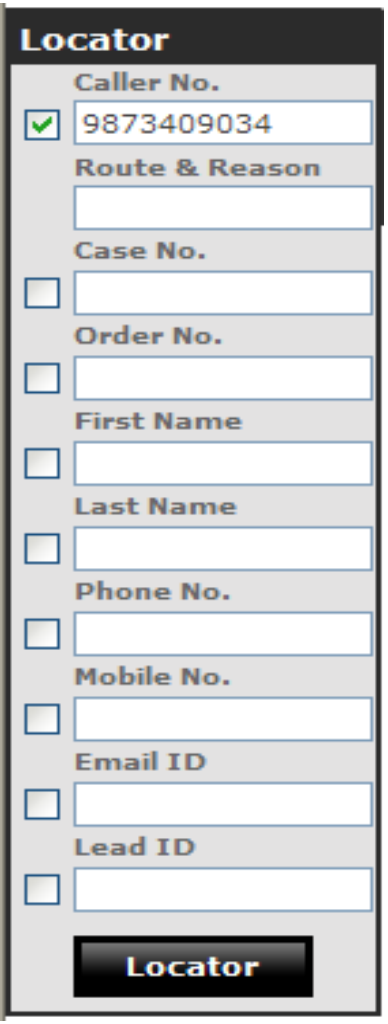
LOCATOR PANEL

Search Customer



Locator Search box has various criteria, which can be used to search a customer :

1. **Caller Number**: Number which was used to book order or register complaint.
2. **Case Number**: Case Number refers to Complaint ID. Ask for case ID if customer is chasing up on a registered complaint.
3. **Order Number**: To enter the order number which customer is referring to.
4. **First Name & Last Name:** To Enter customer's full name which was used/ captured at time of booking an order.
5. **Phone Number:** Alternate contact number given by the customer while order was being booked.
6. **Mobile Number:** To enter the mobile number customer might have specified while order details were being captured.
7. **E-mail ID:** E-mail ID given by customer while booking order.
8. **Lead ID :** ~~Not Available With Customer~~

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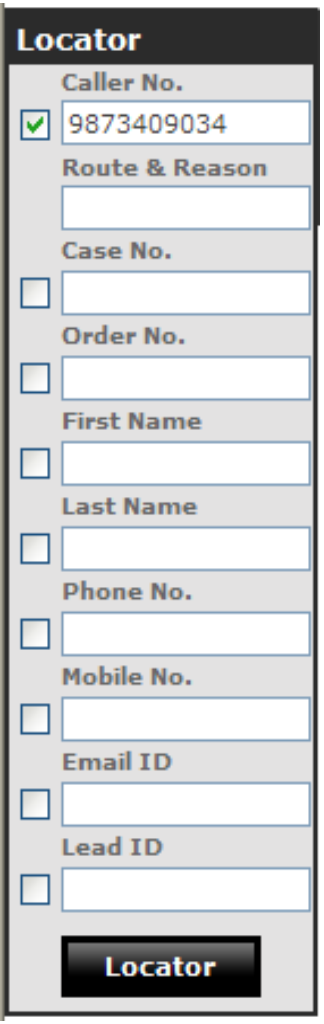
LOCATOR PANEL

Search Customer > Priority Search



When trying to search a customer, we do not have to randomly enter details in locator panel. **Priority Search** means that we have to ask for some specific details sequentially :

1. **Caller Number**: Number Used To Book Order (Default)
2. **Order Number/ Case Number**: Reference Number For Order/Complaint customer is chasing.
3. **Mobile Number**: Any Mobile Number given by customer when order was being placed.
4. **Alternate Number**: Alternate Phone Number given by customer when order details were being captured.
5. **E-mail ID:** E-mail ID given (if any) by customer while giving order details.

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LOCATOR PANEL

Validating Customer

Validating Customer means establishing and confirming the fact that we are speaking to the correct/authorized person. Validation is an important part of call flow and this ensures that customer account specific details are discussed with customer only.

PAST ORDER HISTORY TOP

Generate Gift Voucher

Order No	Copy	Order Date	Shipping Name	Product Name	Price	Payment Mode	Order Status	Vender CRM	Complaint Details	Delivery Issue
3574040		06/03/2012	CHANDRA SEKAR GOLAR	Air Compressor + Car Jack + Car Tyre Repair Kit + Multipurpose Toolkit	2298	Cash on Delivery (COD)	Order Delivered	NO		

Complaint Id	Complaint Type	Status	Comments	Last Updated
2652549	Enquiry Call - No Complaint	Close		
2652537	Delivery Status	Close		

Customer Validation is a important yet simple step wherein we can cross-check for any order related details to validate a contact. This can be about “Order Date”, “Product Name”, “Quantity Booked” etc.

If customer is able to answer 2 of your questions correctly then proceed further.

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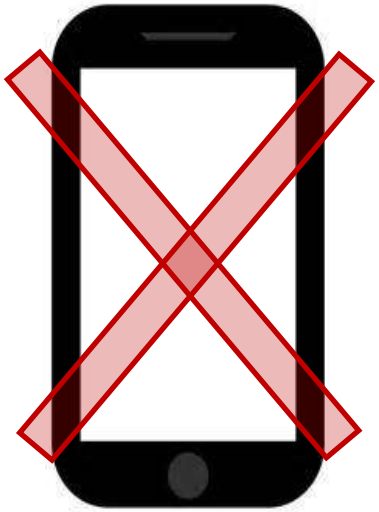

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THANK YOU