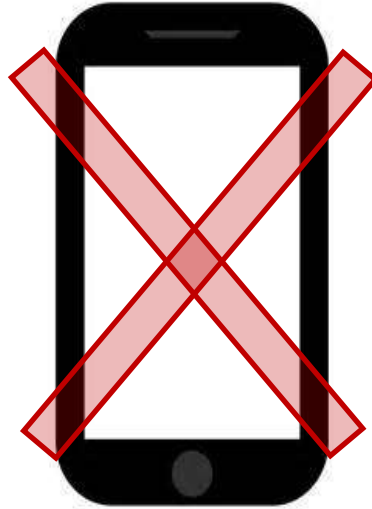




Delivering Happiness

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**



NAAPTOL

CRM LANDING PAGE

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



NAAPTOL

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 ADDRESS FOR ORDER?
- ✓ WHY CUSTOMER REFUSED TO PLACE ORDER?
- ✓ HAS CUSTOMER BOOKED ANY ORDER EARLIER?
- ✓ WHAT IS THE STATUS OF ORDER WHICH CUSTOMER PREVIOUSLY PLACED?



NAAPTOL

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.

NAAPTOL

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](#)

Profile Completion: **44%**

[Edit Profile](#)

Name: PRASHANT MACHHI

Diamond Member

Gender:

Male

Premium Customer

Available Naaptol Loyalty Points:2998

[Diamond Member History](#)

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

NAAPTOL

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: [Incoming](#)

Lead Source / Publication: Web / Web Publication

Caller No: 8329912949

[Add To Do Not Disturb](#)

Profile Completion: **44%**

[Edit Profile](#)

Name: PRASHANT MACHHI

Diamond Member

Gender:

Male

Premium Customer

Available Naaptol Loyalty Points:2998

[Diamond Member History](#)

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
<input checked="" type="radio"/>	Ivomi 4G Mobile with Gorilla Glass	5040		<input type="text" value="1"/>		3499		Free	3499	Now	Black	
<input type="radio"/>	Set of 2 Jaipuri Silk Razai with Gold Prints	4023		<input type="text" value="1"/>	6000	999	83%	Free	999	2 Hour Before	Red	
<input type="radio"/>	Juicer & Slicer Combo + 6 Glasses + Multi Cutter with Peeler	5026		<input type="text" value="1"/>		999		Free	999	4 Hour Before	Yellow	

[More +](#)

NAAPTOL

CRM LANDING PAGE : EXISTING CUSTOMER

CALL DETAILS

Language: English / Call:  Incoming

Lead Source / Publication: Web / Web Publication

Caller No: 8329912949

[Add To Do Not Disturb](#)

Profile Completion: **44%**

[Edit Profile](#)

Name: PRASHANT MACHHI

Diamond Member

Gender:

Male

Premium Customer

Available Naaptol Loyalty Points: 2998

[Diamond Member History](#)

PRODUCT SEARCH

Order Panel - Search Offers

Code

Product Name

Search

Search

Repeat customer

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
<input checked="" type="radio"/>	IvooMi 4G Mobile with Gorilla Glass	5040		1		3499		Free	3499	Now	Black	
<input type="radio"/>	Set of 2 Jaipur Silk Razal with Gold Prints	4023		1	6000	999	83%	Free	999	2 Hour Before	Red	
<input type="radio"/>	Juicer & Slicer Combo + 6 Glasses + Multi Cutter with Peeler	5026		1		999		Free	999	4 Hour Before	Yellow	

[More +](#)

ORDER PUNCH

LEAD PANEL

PAST ORDER HISTORY

PAST LEAD HISTORY

NAAPTOL

CRM LANDING PAGE: EDIT PROFILE

naaptol CRM Ad Browsing - Welcome admin - | Sign Out | Download | CV Details | Dont Disturb Me...!! | CRM Training Manual | My Logins Hours | My Corner June 9, 2016 5:23:22 PM

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

CALL DETAILS

Language: Gujrati Script / Call: Incoming | Caller No: 9967076382 | Add To Do Not Disturb

Lead Source / Publication: Broadcast Call / Cir

QUICK ORDER PUNCH

Select	Product Name	De
<input checked="" type="radio"/>	HP Photosmart D6168	10
<input type="radio"/>	VB001	10
<input type="radio"/>	Spy Pen 8GB	22
<input type="radio"/>	Apple-MacBook (Core2 Duo 7200)	25

QUICK ACCESS: [Shipping Address](#) | [Order History](#) | [Lead History](#)

Profile Completion: **90%**

[Edit Profile](#)

Gender: Male | Date of Birth: 02-Feb-2000 | Marital Status: Married | Date of Annivarsay: -

User Profile Update

Personal Information :

Email ID: er.adityakapoor1@gmail.com

Mobile Number: +91 9819983839

First Name* : Aditya

Last Name* : Kapoor

Gender* : Male Female

Date of Birth* : 1982-01-25 (YYYY-MM-DD)

Marital Status: Married ▼

Date of Anniversary: 2012-01-23 (YYYY-MM-DD)

Education: Student ▼

Known Languages: English

Amount (Rs.)	Date	Size/Colour	Size/Class
15299	TODAY		
5954	Now		
2200	Today's Offer	Select ▼	Select ▼
26298	Today's Offer		

Edit Profile

NAAPTOL

CRM LANDING PAGE: NEW PROFILE

Navneet.Kaur - | [Sign Out](#) | [CV Details](#) | [Dont Disturb Me...!!](#) | [CRM Training Manual](#) | [My Profile](#) | [Feedback](#) | [Last Address](#) | [FAQ](#) | [Crm Reports](#) | [My Logins Hours](#)

Feb 27, 2018 2:26:03 PM

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:

[Add To Do Not Disturb](#)

Profile Completion: 0%

Name:

Silver Member

Available Naaptol Loyalty Points:0

PRODUCT SEARCH

Order Panel - Search Offers

Code

Search

Product Name

Search

Actual
Call
Date &
Time :
27-Feb-
2018
14:23:56

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

No Product Found.

- Product Search Panel
- Web Search Panel
- Order Panel
- Lead Panel
- Case Panel
- Travel Panel
- Locator Panel
- Set of 2 Jai...

QUICK ACCESS: [Shipping Address](#) [Order History](#) [Lead History](#) [Lead Panel](#)

CALL DETAILS

Language: Hindi / Call: Incomming

Lead Source / Publication: Broadcast Call / Naaptol_TV

Caller No: 09096396877 [Add To Do Not Disturb](#) Profile Completion: 0%

Name:

PRODUCT SEARCH

Order Panel - Search Offers

Date	Channel	Product name/Id	Deal Code	<input type="text"/> Search
------	---------	-----------------	-----------	---

CRM LANDING PAGE - KEY SECTIONS

Select	Product Name	Code	Offer Details	Qty	value	Offer	save	Shipping	(Rs.)	Date	size/class
<input checked="" type="radio"/>	Set of 2 Jaipuri Silk Razai with Gold Prints - AKSO	4023		1	6000	999	83%	399	1398	Now	
<input type="radio"/>	Instant Electric Heating Tap - Wall Mount or Surface Mount	3886		1		2599		399	2998	47 Minute Before	Select
<input type="radio"/>	43 Pcs Stainless Steel Storage & Serving Set	2860		1	6500	1999	69%	399	2398	1 Hour Before	

ORDER PUNCH

LEAD PANEL TOP

PAST ORDER HISTORY TOP

PAST LEAD HISTORY TOP



NAAPTOL

CRM LANDING PAGE – CALL DETAILS

CALL DETAILS

Language: Hindi / Call:  Incomming

Lead Source / Publication: Broadcast Call / WOW_Cinema

Caller No: 8600529819

[Add To Do Not Disturb](#)

Profile Completion: **44%**

[Edit Profile](#)

Name: SANDEEP SHIVAJI SUTAR

Diamond Member

Gender:

Male

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.

NAAPTOL

CRM LANDING PAGE – CALL DETAILS

CALL DETAILS		
Language: Hindi / Call: Incoming	Caller No: 8974748147 Add To Do Not Disturb	Profile Completion: 44% <a>Edit Profile
Lead Source / Publication: Broadcast Call / WOW_Cinema	Name: MD SAKIUR RAHMAN Premium Customer Silver Member	Gender: Male


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.

NAAPTOL

KEY SECTIONS : CRM LANDING PAGE – CALL DETAILS

CALL DETAILS

1 Language: English / Call:  Incoming

2 Lead Source / Publication: Web / Web Publication

3 Caller No: 8329912949 [Add To Do Not Disturb](#)

4 Name: PRASHANT MACHHI [Premium Customer](#)

5 [Diamond Member](#)

6 Profile Completion: 44% [Edit Profile](#)

Gender: Male

7 Available Naaptol Loyalty Points:2998 [Diamond Member History](#)

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

CALL DETAILS

Language: English / Call:  Incoming

Lead Source / Publication: Web / Web Publication

Caller No: 8329912949

[Add To Do Not Disturb](#)

Profile Completion: 44%

[Edit Profile](#)

Name: PRASHANT MACHHI

Diamond Member

Gender:

Male

Premium Customer

Available Naaptol Loyalty Points:2998

[Diamond Member History](#)



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NAAPTOL

KEY SECTIONS : CRM LANDING PAGE – CALL DETAILS

A Diamond member is...

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

CALL DETAILS

Language: English / Call:  Incomming	Caller No: 8329912949 Add To Do Not Disturb	Profile Completion: 44% Edit Profile
Lead Source / Publication: Web / Web Publication	Name: PRASHANT MACHHI  	Gender: Male
	Available Naaptol Loyalty Points:2998 Diamond Member History	

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.**

NAAPTOL

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

Available Naaptol Loyalty Points:1499
Diamond Member History

Date of Birth:
Marital Status:
Date of Anniversay:

Naaptol Loyalty Points History

Available

Redeemed

Expired

Pending

Avl. Naaptol Loyalty Points : 1499

Earn Reason	NT Cash	Earned Date	Entity_Id
HAPBRD	500	23-Feb-2018 00:11:28	5200968
ORDPUNCH	999	14-Oct-2017 00:40:42	40233034

NAAPTOL

EXPANDABLE SECTIONS

+ ORDER PUNCH

ORDER PUNCH

ADD GIFT >>



Become a Diamond Member Today by paying Rs.599 and enjoy Free Delivery for 1 year.

[Details](#)

Shipping Address

New Shipping Address

Initials*

-Select Initials-

First Name*

Last Name*

Mobile* For Alert

7277750988

Address*

Landmark

City*

State*

Pincode* [Search Pin](#)

Alt Phone: [Copy Call No](#)

Remarks:

[Check Delivery Time](#)

NAAPTOL

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.

The screenshot shows the 'PRODUCT SEARCH' interface. At the top, there is a header 'PRODUCT SEARCH' and a sub-header 'Order Panel - Search Offers'. Below this, there are two search input fields: 'Code' (labeled '1') and 'Product Name' (labeled '2'). Each field has a corresponding 'Search' button. A blue callout box points to the right side of the interface, stating 'Shows date and time when call landed', with an arrow pointing to the 'Actual Call Date & Time : 13-Aug-2017 09:20:45' text. Below the search fields is a table with columns: Select, Product Name, Deal Code, Offer Details, Qty, Value, Offer, Save, Shipping, Amount (Rs.), Date, Size/Colour, and Size/Class. The table contains three rows of product data. A blue callout box labeled 'Radio Buttons' points to the radio button in the first row. Another blue callout box labeled 'More +' points to a 'More +' button below the table. A third blue callout box labeled 'To View more products' points to the 'More +' button. The NAAPTOL logo and tagline 'Delivering Happiness' are in the bottom right corner.

Select	Product Name	Deal Code	Offer Details	Qty	Value	Offer	Save	Shipping	Amount (Rs.)	Date	Size/Colour	Size/Class
<input checked="" type="radio"/>	Set of 2 Jaipuri Silk Razai with Gold Prints	4023		1	6000	999	83%	399	1398	Now	Red	
<input type="radio"/>	Juicer & Slicer Combo + 6 Glasses + Multi Cutter with Peeler	5026		1		999		399	1398	21 Minute Before	Yellow	
<input type="radio"/>	112 Pcs Dnt Machine & Screwdriver Set Combo	2891		1	3999	1999	50%	399	2398	4 Hour Before		

NAAPTOL

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.

ORDER PUNCH PANEL

Select	Product Name	Offer	Offer Details	Quantity	Offer Price	Shipping Price	Total Amount	Size/Colour
<input type="radio"/>	Ivornal 4G Mobile with Gorilla Glass	5072		1 <input type="text"/>	3400.0	300.0	3800.0	Black

ADD GIFT >>

Become a Diamond Member Today by paying Rs.500 and enjoy Free Delivery for 1 year. [Benefits](#) Earn 3499 Naaptol Cash by placing this order.

Shipping Address

New Shipping Address

Initials* First Name* Last Name* Mobile* For Alert

Address* Landmark


City* State* Pincode* [Search Pin](#) Alt Phone [Copy Caller No](#)

Remarks:

[Check Delivery Time](#)

User Address Book

No Address Book Found.



Delivering Happiness

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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.

ORDER PUNCH

Shipping Address

New Shipping Address

Initials*	First Name*	Last Name*	Mobile* For Alert
Mr. <input type="checkbox"/>	JYOTIR MOY	DAS	9436538717

Address*

VILLEGE PRATAPGARGH, POST AGARTALA, ROAD NO 1, SADAR, WEST TRIPURA

Landmark


RATION SHOP NO , MAHARAJ GANJ BAZAR


City*	State*	Pincode*	Search Pin	Alt Phone	Copy Caller No
AGARTALA	TRIPURA	799001		09402364964	

Remarks:

Check Delivery Time

User Address Book

Copy	Name	Address	Mobile / Landline
	Mr. JYOTIR MOY DAS	VILLEGE PRATAPGARGH, POST AGARTALA, ROAD NO 1, SADAR, WEST TRIPURA AGARTALA, TRIPURA - 799001 Landmark : RATION SHOP NO , MAHARAJ GANJ BAZAR	Mobile: +91 9436538717 Landline: 09402364964



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

NAAPTOL

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.

LEAD PANEL [CTRL + ALT + L] TOP

Sales-Customer Not Convinced	Sales-Option Not Available	UnProductive Call	Corporate Enquiries
Customer Denies Shipping Charges	Pincode Not Available / serviceable	Call Disconnected / Blank Call	Organizational Enquiry
Enquiry / Need Time / Consult Family	Customer Does Not Know Pin Code	Kids / Junk Calls	Bulk Order Enquiry
Not At All Interested	City Not Available In CRM	Non Connecting Calls	Other Business Enquiry
Price is Too High	Product/Options Not Available	Wrong Number	Vendor / Distributor Enquiry
Out Of Station	CRM Restrictions / COD not available	Customer do not have order number.	Partner Leads
Bad Experience	Out of Stock	Other Language/ Dialect Not Clear	Customer Profile Completion
Low Confidence in Quality	Diamond not showing-informed to call from registered number	Order Placed On CRM	
Customer Want Open Delivery	Customer wants partial combo	Test Call	
Want to See the Product on TV or Web			
Repeated calls to the customer			
Reason Not Disclosed			

Product Name Initials First Name Last Name

Lead Details

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

NAAPTOL

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

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


NAAPTOL

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.

NAAPTOL

VIRTUAL WALLETS

Payment Wallets / Cash Voucher

PAYMENT MODE: Cash on Delivery (COD)

Offer Value Rs. 26298

Redeemed Amount 0

Cash Voucher Amount Rs. 0

Final Amount To Be Paid 26298

ORDER NOW >>

Payback

1253 Points = 313.25 Rs

USE

Naaptol Rewards

98016 Points = 24504 Rs

USE

Oxygen

CHECK

Mobikwik

CHECK

State Bank Freedom
Rewardz

CHECK

REDEEM A CASH VOUCHER

[CV Details](#)

Validate

[Reset](#)

NAAPTOL

VIRTUAL WALLETS

Payment Wallets / Cash Voucher

PAYMENT MODE: Cash on Delivery (COD)

Offer Value	Rs. 2200
Redeemed Amount	Rs. 0
Cash Voucher Amount	Rs. 0

Final Amount To Be Paid Rs. 2200

ORDER NOW >>

Payback 1253 Points = 313.25 Rs USE	Naaptol Rewards 98016 Points = 24504 Rs USE	Oxygen N/A
Mobikwik More Than 1 Rs USE	State Bank Freedom Rewardz CHECK	

Used Wallet / Reward: **MOBIKWIK** | Caller Acc. contains: **More Than 1 Rs**

Enter Redeem Amount **Calculate** [Reset](#)

OTP SMS Sent to : 9819983839

Enter OTP **Submit OTP** [Regenerate OTP](#)

REDEEM A CASH VOUCHER

[CV Details](#)

Validate [Reset](#)

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 .

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.

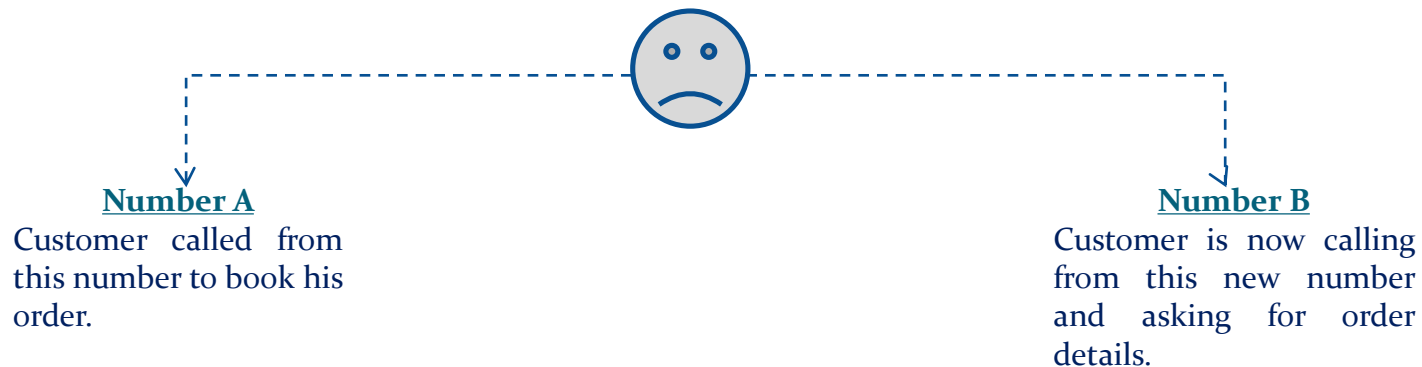
- ✓ It automatically picks up the number from which customer is contacting us and pops up the relevant details accordingly.
- ✓ This is the first screen you will encounter in CRM when customer's call will connect.

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.



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

LOCATOR PANEL

Search Customer

Locator

Caller No.
9873409034

Route & Reason
[] []

Case No.
[] []

Order No.
[] []

First Name
[] []

Last Name
[] []

Phone No.
[] []

Mobile No.
[] []

Email ID
[] []

Lead ID
[] []

Locator

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

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.

Locator	
Caller No.	<input checked="" type="checkbox"/> 9873409034
Route & Reason	<input type="text"/>
Case No.	<input type="text"/>
Order No.	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Phone No.	<input type="text"/>
Mobile No.	<input type="text"/>
Email ID	<input type="text"/>
Lead ID	<input type="text"/>
<input type="button" value="Locator"/>	

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

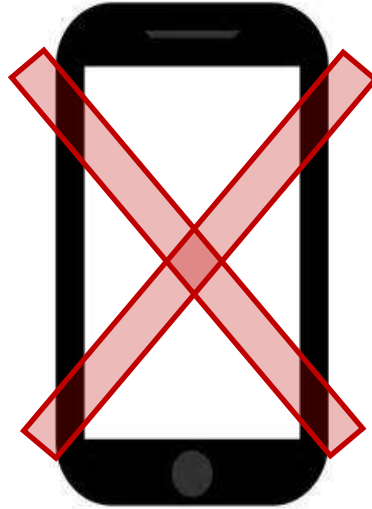
Generate Gift Voucher

Order No	Copy	Order Date	Shipping Name	Product Name	Price	Payment Mode	Order Status	Vender CRM	Complaint Details					Delivery Issue
									Complaint Id	Complaint Type	Status	Comments	Last Updated	
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	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.

IMPORTANT !



WARNING!

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



THANK YOU

