

CUSTOMER CARE SYSTEM USER MANUAL:

COS730

MATHEBULA MA

U11242796

INTRODUCTION :

Software Overview:

The customer Care System is divided into several distinct parts. Most notably it consists of a database server and a user client application. The reason for having this design is that the common usage of Customer Care System is a multi-station setup where we have several systems running the application.

Customer Care System Server:

Customer Care System uses MySQL Server software to create and store all its data. The database or Customer Care System Server is always installed together with the Customer Care System. If you have several stations the clients are then set up to access the same Customer Care System Server. Refer to installation instructions on how to do this. The Customer Care System Server starts automatically when you turn on the computer, so the user does not need to manually start it.

Admin Portal:

The Administration Portal allows you to add, remove or alter Customer Care System information. The portal also allows you to backup and restore your databases, for example, if your database stops working, if important information in the database is accidentally erased or if you simply wish to move databases to another Database Server.

Manager Portal

The Manager portal is used to manage all complaints received, assign a complaint to relevant staff users, monitor staff performance, reply, and sends feedback to customers via email, and generate complaints reports. The data that is created is then retrieved when the manager login to the system. You can also retrieve and analyze the volume and performance of the staff. Further examination of the data is made possible by downloading the report into Microsoft Excel or PDF.

Staff Portal

When you login with a staff account you will enter the staff portal of the application where the complaint management takes place. The staff can select from the complaint that is currently assigned to them. When a complaint has been selected, the complaint details can be seen, and a specific task can be selected. The task is then started and after completion, a result page is shown. Depending on the type of complaint the staff can change complaint status, update remarks, re-assign the complaint and send a reply to the customer via email.

Customer Portal:

When customers login with a customer account, they will be presented with the customer dashboard, which shows all activities performed. Customers will see History complaints, track the status of their logged complaint, change password, change a picture, change communication details

such as email and phone number. Customers will receive email notifications once a complaint has been resolved, or they can login to the system to get a reply from the company.

QuickStart Guide for Admin:

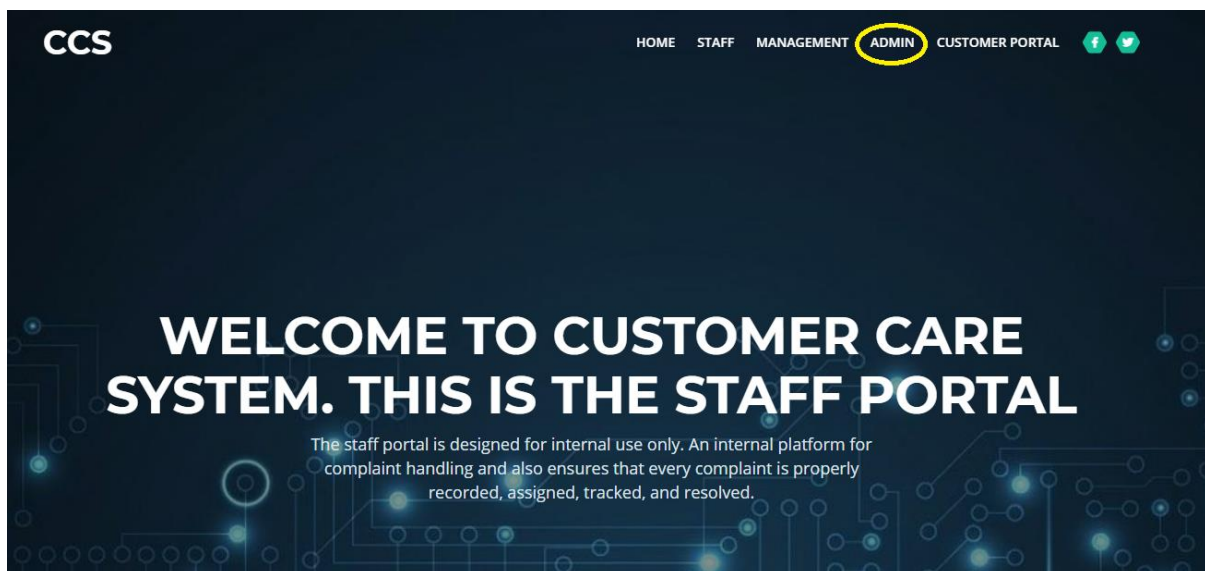
This section contains a brief introduction to the common tasks within the admin portal. Refer to the full documentation of each feature for all details.

Starting Customer Care and logging in with the Admin account:

- User the link: <http://127.0.0.1:5500/web/portal.html>



- Click on the Admin section



- Login appears:

Sign In

Username

Password

Login

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- Use the admin credentials when the login screen appears. If it is the first time you use the system, log in with the default admin and the default admin password provided by the system owner.
- Menu Appears on the sidebar with all option available for the admin:
- The first page is user activity logs View as a home page. From here you can always go to any of the 7 choices on the sidebar: Manage Users, Add Users, Add Category, Add Subcategory, Add City, Customer Profile, and User Login Log

Manage users
Add Users
Add Category
Add Sub-Category
Add City
Customer Profile
User Login Log
Logout

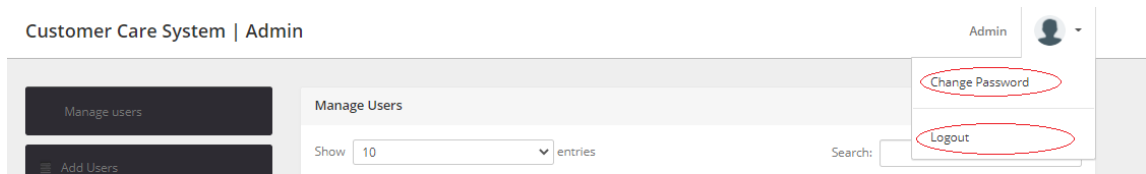
Manage Users

Show entries Search:

#	User Email	User IP	Login Time	Logout Time	Status
21	miehleketo93@gmail.com	::1	2021-06-13 17:42:23		Successfull
22	aubre.nkati@gmail.com	::1	2021-06-13 17:48:32		Failed
23	aubrey.nkati@gmail.com	::1	2021-06-13 17:48:46		Successfull
24	miehleketo93@gmail.com	::1	2021-06-13 18:03:11	13-06-2021 06:53:43 PM	Successfull
25	miehleketo93@gmail.com	::1	2021-06-13 19:05:03		Successfull
26	miehleketo93@gmail.com	::1	2021-06-13 19:14:51		Successfull
27	testing@gmail.com	::1	2021-06-13 20:20:37		Successfull
28	mie@gmail.com	::1	2021-06-13 20:21:57	13-06-2021 08:24:28 PM	Successfull
29	aubrey.nkati@gmail.com	::1	2021-06-13 20:25:35	13-06-2021 08:28:04 PM	Successfull
30	miehleketo93@gmail.com	::1	2021-06-13 20:28:20		Failed

Showing 21 to 30 of 37 entries

- Admin Change password option:



- Supply all relevant information required when changing password:
- Once happy, click Submit:

Customer Care System | Admin

Admin

Admin Change Password

Current Password Enter your current Password

New Password Enter your new current Password

Current Password Enter your new Password again

Submit

Manage users

Add Users

Add Category

Add Sub-Category

Add City

Customer Profile

User Login Log

Logout

- Logout option, once click logout you will exit the system and see this window:

Customer Care System | Admin

Sign In

You have successfully logout

Username

Password

Login

MANAGER PORTAL:

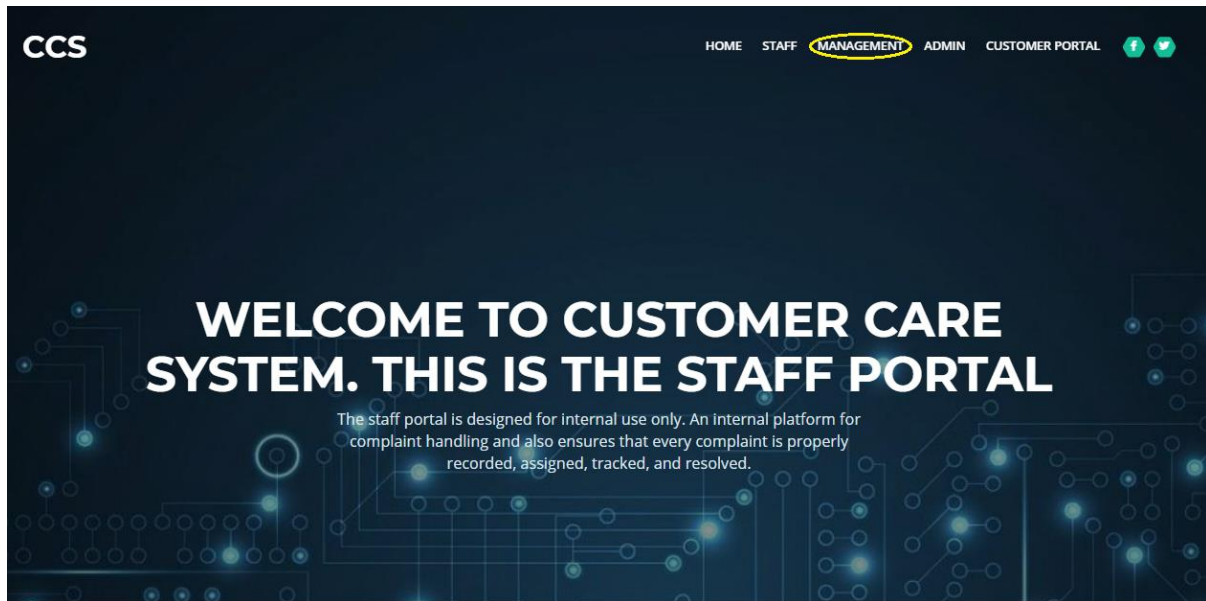
This section contains a brief introduction to the common tasks within the staff portal. Refer to the full documentation of each feature for all details.

Starting Customer Care System and logging in with the Manager account:

- User the link: <http://127.0.0.1:5500/web/portal.html>



- Click the Management.



- Login appears.
- Supply manager login credentials, if you are new supply default username and password supplied to you by the admin.

Customer Care System | Management

Sign In

Username

Password

Login

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- New Complaint load as the home page. This is where you see all new complaint which is not yet processed.

Customer Care System | Management Portal

Management

Manage Complaint

Reports

Logout

New Complaints

Show 10 entries

Search:

Complaint No	Complaint Type	Category	Reg Date	Assigned To	Status	Action
3	General Query	Card	2021-06-12	Test Testing	Not process yet	View Details
4	Complaint	Will	2021-06-13	Mieheketo Mathebula	Not process yet	View Details
5	Complaint	Estate Planning	2021-06-13	Test Testing	Not process yet	View Details
6	General Query	Foreign Exchange	2021-06-13	pretty lelo	Not process yet	View Details
7	Complaint	Unit-Trust	2021-06-13	Test Testing	Not process yet	View Details
8	Complaint	Credit Card	2021-06-13	pretty lelo	Not process yet	View Details
9	General Query	Education	2021-06-13	pretty lelo	Not process yet	View Details

Showing 1 to 7 of 7 entries

- From the menu, on the sidebar, you will Manage Complaint, Reports, and log-out tabs which you can choose from.
- Under the Manage complaint tab, you will find all complaint with different statuses



Manage Complaint

Not Process Yet Complaint

7

Pending Complaint

1

Closed Complaints

1

Reports

Logout

New Complaints

Show entries Search:

Complaint No	Complaint Type	Category	Reg Date	Assigned To	Status	Action
3	General Query	Card	2021-06-12	Test Testing	Not process yet	View Details
4	Complaint	Will	2021-06-13	Miehleketo Mathebula	Not process yet	View Details
5	Complaint	Estate Planning	2021-06-13	Test Testing	Not process yet	View Details
6	General Query	Foreign Exchange	2021-06-13	pretty lelo	Not process yet	View Details
7	Complaint	Unit-Trust	2021-06-13	Test Testing	Not process yet	View Details
8	Complaint	Credit Card	2021-06-13	pretty lelo	Not process yet	View Details
9	General Query	Education	2021-06-13	pretty lelo	Not process yet	View Details

- Select any of the 3 options provided to see more details on the complaint.
- Select Pending Complaint to see all InProgress Complaints been handled by your staff members.



Manage Complaint

Not Process Yet Complaint

7

Pending Complaint

1

Closed Complaints

1

Reports

Logout

InProgress Complaints

Show entries Search:

Complaint No	Complaint Type	Category	Reg Date	Assigned To	Status	Action
1	Complaint	Cash Withdrawals	2021-06-12	Miehleketo Mathebula	In Progress	View Details

Showing 1 to 1 of 1 entries

◀ ▶

- Click View Details in the Action to see more tasks.
- Complaint details window will show all the details about the complaint, files attached, details, status, remarks, remark date,
- Actions buttons are also available to see user details, take action, and assign the complaint to another available agent.



Manage Complaint

Reports

Logout

Complaint Details

Complaint Number	1	Complainant Name	Aubrey	Reg Date	2021-06-12 23:02:50
Category	Transact	SubCategory	Cash Withdrawals	Complaint Type	Complaint
State	Polokwane	Nature of Complaint	General		
Complaint Details	Hi, I tried to withdrawal money from one of the ATMs in Polokwane Complex, The ATM went offline during the process and later reflected that the money was withdrawn from my account. see slips attached.				
File(if any)	View File				
Final Status	in process				
Remark	Still waiting for feedback from other departments Remark Date :2021-06-13 21:30:56				
Status	in process				
Action	<div>Take Action</div> <div>Assign</div> <div>View User Details</div>				

- Click Action to write a reply to the complaint.

Management Portal

Complaint Details

Complaint Number	1
Category	Transact
State	Polokwane
Complaint Details	Hi, I tried to withdrawal money from one of the ATMs in Polokwane Complex, The ATM went offline during the process and later reflected that the money was withdrawn from my account. see slips attached.
File(if any)	View File
Final Status	in process
Remark	Still waiting for feedback from other departments
Status	in process
Action	<div>Take Action</div> <div>Assign</div>

Customer Care System | Management Portal

Complaint Number

1

Status

Select Status

Remark

Submit

Close this window

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- Click Assign to re-assign the complaint to another available staff agent.

Management Portal

Complaint Details	
Complaint Number	1
Category	Transact
State	Polokwane
Complaint Details	Hi, I tried to withdraw and later reflected that
File(if any)	View File
Final Status	in process
Remark	Still waiting for feedback
Status	in process
Action	<div>Take Action</div> <div>Assign</div>

Customer Care System | Management Portal

Staff User

Complaint Number

1

Assign To

Select Employee Name

▼


Submit

Close this window

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- Click on Closed Complaint to see a number of closed complaints.
- Click Send email to send an email to the customer

Customer Care System | Management Portal

Management 

Manage Complaint

Not Process Yet Complaint 7

Pending Complaint 1

Closed Complaints 1

Reports

Logout

Closed Complaints

Show 10 entries

Search:

Complaint No	Complaint Type	Category	Reg Date	Assigned To	Status	Send Email
2	General Query	Card	2021-06-12	Mieheleto Mathebula	Closed	Send Email

Showing 1 to 1 of 1 entries

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- Click Report to access reports available.

Complain Status Details


- [Open Complain](#)
- [Close Complain](#)
- [Working Complain](#)
- [Assigned Complain](#)

Detail Reports

- [Employee Details](#)
- [Customer Details](#)
- [Plan Details](#)

- Click Change password for Manager.

Customer Care System | Management Portal

Management 

Change Password

Logout

Manage Complaint

Reports


Closed Complaints

Show 10 entries

Search:

- Change password window in the management portal.

Customer Care System | Management Portal

Management 

Management Change Password

Current Password Enter your current Password

New Password Enter your new current Password

Current Password Enter your new Password again

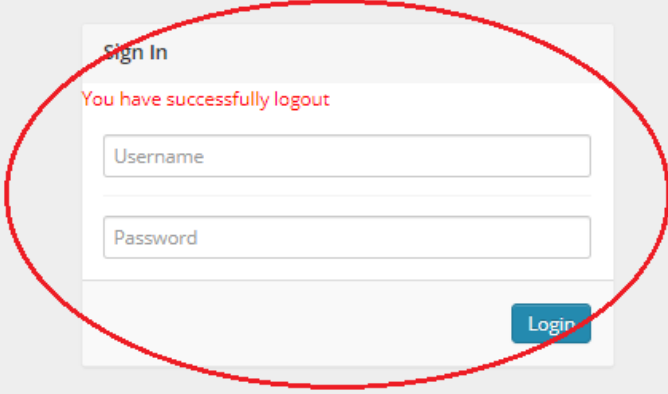
Submit

Manage Complaint

Reports

Logout

- Click Logout to exit the system.



Sign In

You have successfully logout

Username

Password

Login

STAFF PORTAL:

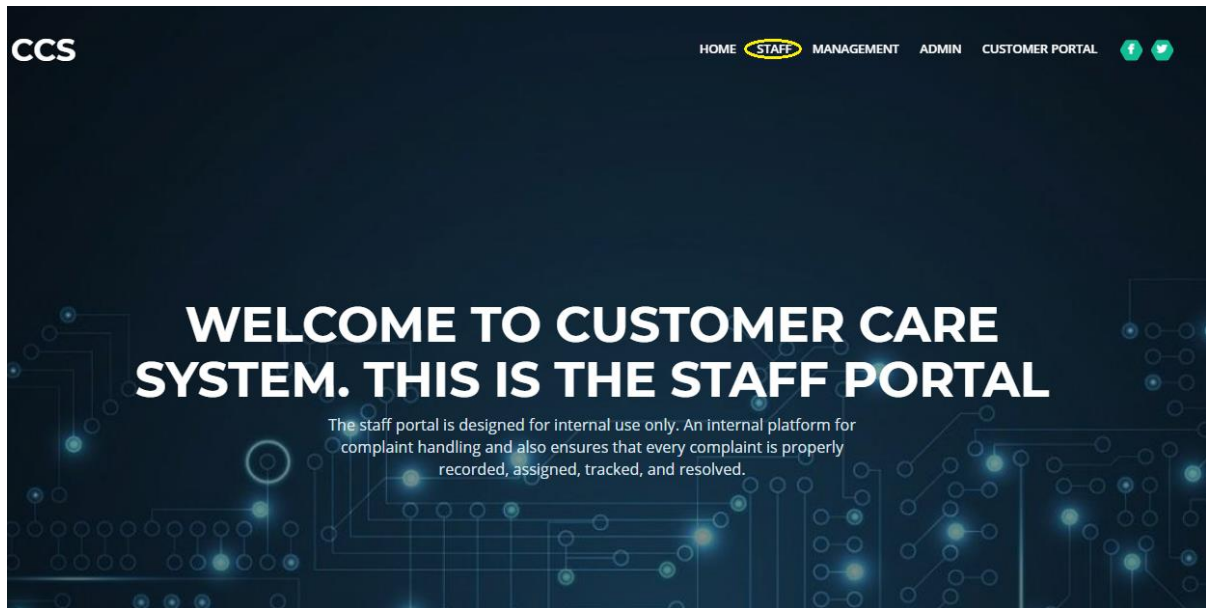
This section contains a brief introduction to the common tasks within the staff portal. Refer to the full documentation of each feature for all details.

Starting Customer Care System and logging in with the staff account:

- User the link: <http://127.0.0.1:5500/web/portal.html>



- click the staff option.



- Login will be presented, staff user supply staff credentials to login, if a user is new, click on register and if you forgot password, click on forgot password to reset password.

Customer Care System

SIGN IN NOW

User ID

Password

[Forgot Password?](#)

SIGN IN

[Don't have an account yet? Create an account](#)

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- Supply all relevant information required when resetting the password. This is for existing users

Forgot Password ?

Enter your details below to reset your password.

Email

phone No

New Password

Confirm Password

Cancel Submit

- Registration form, supply all relevant information required for new users.

Customer Care System

STAFF REGISTRATION

Employee Number

First Name

Last Name

Work Email

Password

Phone No

[Register](#)

User Already Registered
[Sign in](#)

- Once login, the Home page will load which will be the Staff Dashboard.
- The sidebar will show the menu, you can select the tab you want to see from the list.
- The number of complaints assigned to the staff user will appear at the top, with different statuses.

STAFF PORTAL

Miehléketo

- Dashboard
- Account Setting
- Not Inprogress Complaint
- Inprogress Complaint
- Closed Complaints
- LOGOUT

1

1

1

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- Click the Account setting to update your profile.
- Update profile picture
- Phone number
- Name and surname

- Click submit to save your information

STAFF PORTAL Logout

Mieheleto

Dashboard

Account Setting

Profile

Change Password

Not Inprogress Complaint

Inprogress Complaint

Closed Complaints

LOGOUT

> Profile info

Mieheleto's Profile

Last Updated at :

First Name: Mieheleto

Last Name: Mathebula

Phone No: .

User Photo

Change Photo

Submit

- Click on Change password to change your password.
- Supply all relevant information required.
- Click Submit to save.

STAFF PORTAL Logout

Mieheleto

Dashboard

Account Setting

Profile

Change Password

Not Inprogress Complaint

Inprogress Complaint

Closed Complaints

LOGOUT

> Change Password

> User Change Password

Current Password

New Password

Confirm Password

Submit

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- Click on Not Progress Complaints to see all complaints assigned to you
- Click on Action – View Details to see complaint details logged

STAFF PORTAL Logout

Mieheleto

Dashboard

Account Setting

Not Inprogress Complaint

Inprogress Complaint

Closed Complaints

LOGOUT

>Not Inprogress

Complaint No	Complaint Type	Category	Reg Date	Assigned To	Status	Action
4	Complaint	Will	2021-06-13	Mieheleto Mathebula	Not process yet	View Details

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- Complaint details window presented.
- See all details you need to resolve the complaint.

- Click Take Action to reply and change the status of the complaint.
- Click Assign to reassign the complaint to the relevant staff user available.
- Click View details to see customer details.

STAFF PORTAL Logout

Miehlaketo

Dashboard
Account Setting
Not Inprogress Complaint
Inprogress Complaint
Closed Complaints
LOGOUT

>Inprogress

Complaint Number	4	Complainant Name	mie	Reg Date	2021-06-13 20:22:43
Category	Family Banking	SubCategory	Will	Complaint Type	Complaint
State	Gqeberha	Nature of Complaint	General		
Complaint Details	Hi, My Will is not reflecting on my banking portal				
File(if any)	View File				
Final Status	Not Process Yet				
Action	Take Action Assign View User Details				

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- Take action window.
- Select status.
- Supply Remark
- Click submit
- Closed window once done.

Complaint Number 4

Status Select Status ▼

Remark

- Click Assign
- Select staff user to assign to
- Click submit to save.

- Click close window when done.

Staff User

Complaint Number

4

Assign To

Select Employee Name ▼

Submit

Close this window

u11242796@tuks.co.za

- Click send email to send reply to customer.

Send Email

✕ Mail Sent to Customer!

To

u11242796@tuks.co.za

From

miehleketto93@gmail.com

Subject

Card General Query

Message

Card to be delivered
today before 5 pm

Send

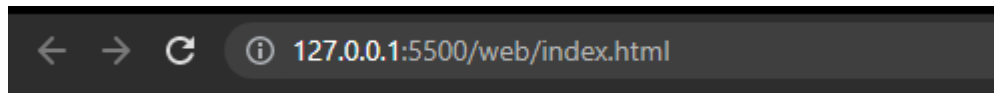
u11242796@tuks.co.za

CUSTOMER PORTAL:

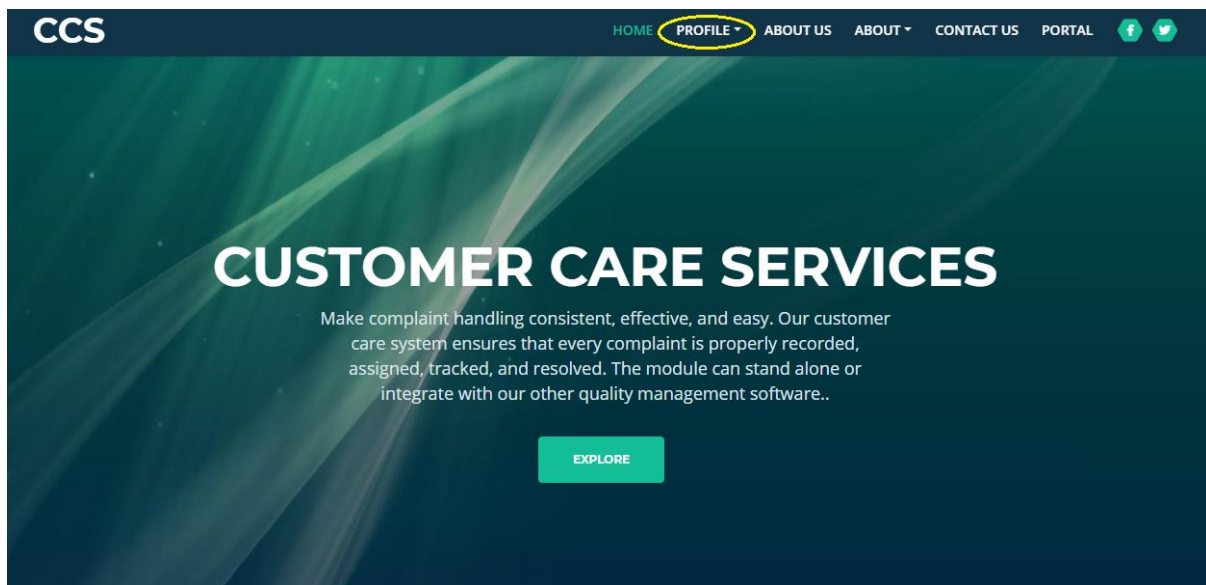
This section contains a brief introduction to the common tasks within the Customer portal. Refer to the full documentation of each feature for all details.

Starting Customer Care System and logging in with the customer account:

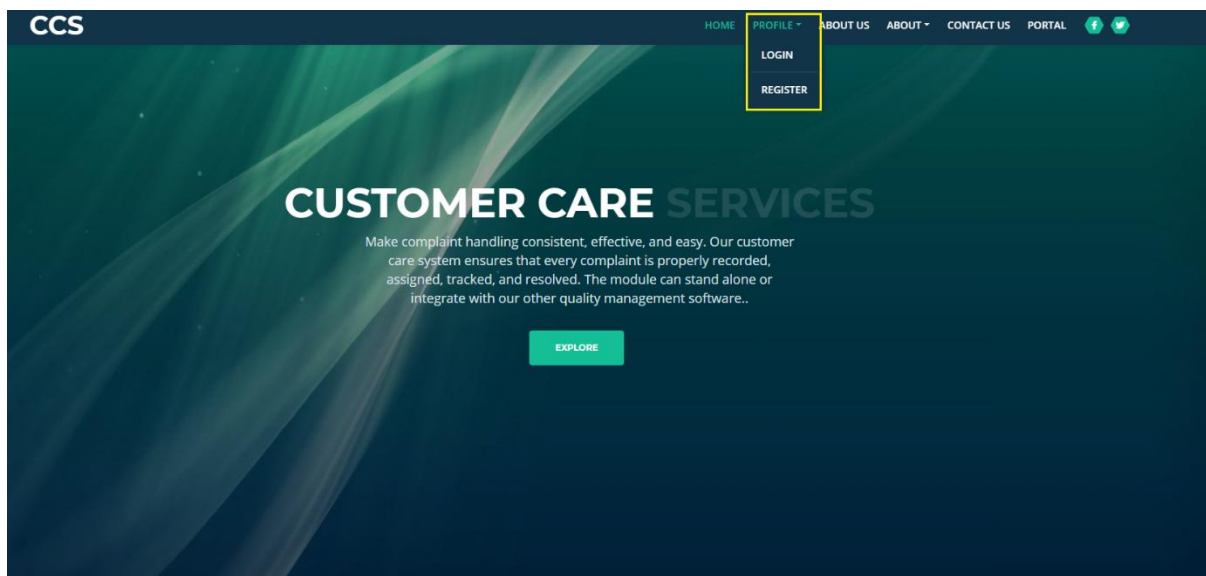
- User the link: <http://127.0.0.1:5500/web/index.html>



- Click Profile



- Click on login for existing customer users.
- Click on register for new customer user.



- Click on Register,
- Register window, fill in the form, and click on register.

Customer Care System

NEW CUSTOMER USER REGISTRATION

Full Name

Email ID

Password

Contact no

Register

User Already Registered
Sign in

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- Click on login.
- Supply all information required.
- Click on the sign-in button.
- If you forgot your password, you could click on forgot password to reset your password.

Customer Care System

SIGN IN NOW

User ID

Password

Forgot Password?

SIGN IN

Don't have an account yet?
Create an account

- Click on forgot password.
- Supply relevant information required and click submit to save.

Customer Care System

Forgot Password ?

Enter your details below to reset your password.

Email

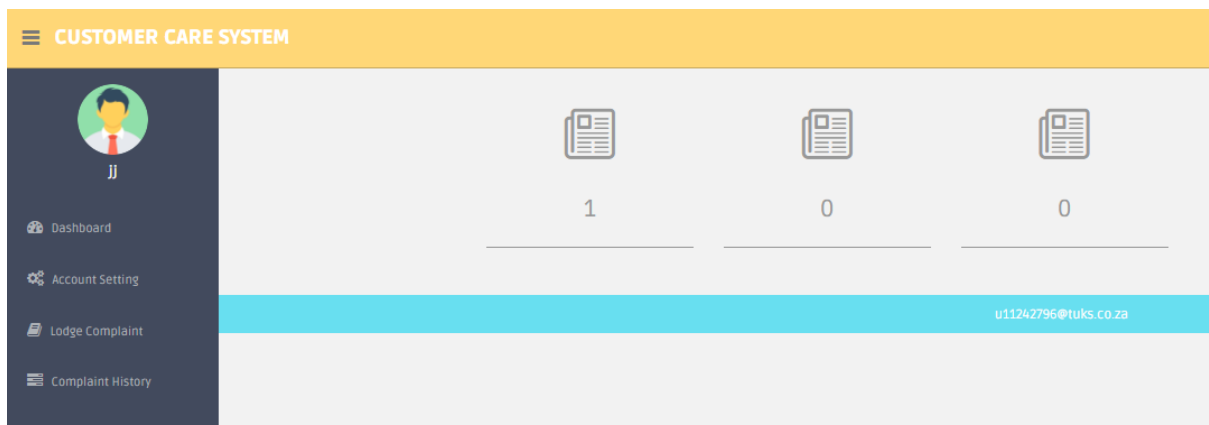
contact No

New Password

Confirm Password

Cancel Submit

- The home page will display all your activities.
- The sidebar menu has 3 choices, lodge complaint, complaint history, and account setting.



- Click on the Account setting to update your profile.
- Profile windows display your info.
- Supply information you wish to change and click submit.

CUSTOMER CARE SYSTEM

> Profile info

JJ's Profile
Last Updated at : 2021-05-19 08:55:55

Full Name: JJ

Contact: 79

State: [Dropdown]

Pincode: [Input]

User Email: miehieketo93@gmail.com

Address: [Input]

Country: [Input]

Reg Date: 2021-05-19 13:04:18

User Photo: [Placeholder Image] [Change Photo](#)

[Submit](#)

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- Click on change password to update your password.
- Once happy click on submit to save.

CUSTOMER CARE SYSTEM

> Change Password

> User Change Password

Current Password: [Input]

New Password: [Input]

Confirm Password: [Input]

[Submit](#)

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- Click on lodge complaint to register a new complaint.
- Fill in all relevant information required about your complaint.
- Attach pictures, pdf.docx files of your choice as evidence if required.
- Click submit to send to the administrator.

CUSTOMER CARE SYSTEM

> Register Complaint

Category: Select Category Sub Category: Select Subcategory

Complaint Type: Complaint CTD Select State:

Nature of Complaint: General

Complaint Details (max 2000 words):

Complaint related docif any: Choose File No file chosen

Submit

g112a2796@tutso.co.za

- Click on complaint History to see your previous lodged complaint.
- Click on view details to see your complaint details.

CUSTOMER CARE SYSTEM

> Your Complaint History

Complaint Number	Reg Date	last Update date	Status	Action
9	2021-06-13 20:30:27	2021-06-13 20:30:33	Not Process yet	View Details

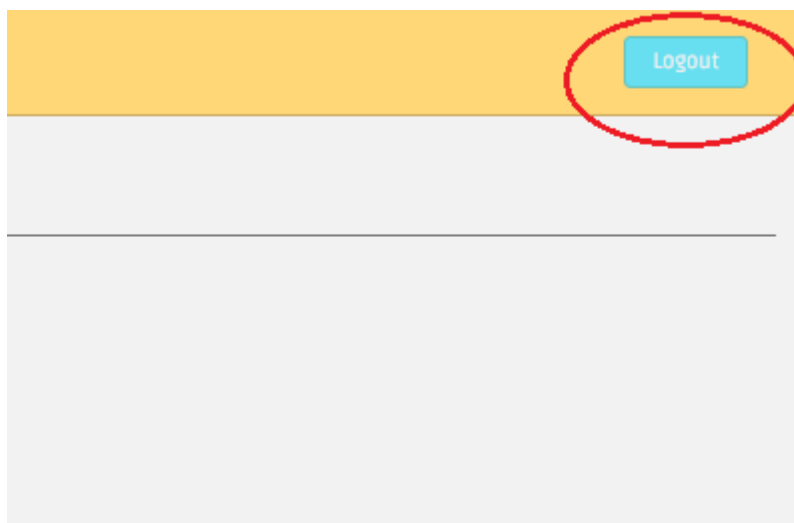
g112a2796@tutso.co.za

CUSTOMER CARE SYSTEM

> Complaint Details

Complaint Number :	9	Reg. Date :	2021-06-13 20:30:27
Category :	Financial Planning	Sub Category :	Education
Complaint Type :	General Query	City :	Durban
Nature of Complaint :	General	File :	File NA
Complaint Details	My account was deducted last month, I have now closed the education account, please advice when will this reflect on your side?		
Final Status :	Not Process yet		

- Click on logout to exit the system.



For user experience issues, users are allowed to reach the system engineers by using the form on contact us.

CCS

HOMEPROFILEABOUT USABOUTCONTACT USPOTAL

CONTACT

Get In Touch Using The Form

You can stop by our office for a cup of coffee and just use the contact form below for any questions and inquiries

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Name

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Your message

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SUBMIT MESSAGE

Few Words About Customer Care System

We're passionate about delivering the best business growth services for companies just starting out as startups or industry players that have established their market position a long time ago.

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