

# VSAT CRM – CC Agent Workflow

## Role: Call Center Agent

The **CC Agent** is responsible for registering customer complaints, managing bulk uploads of complaints, viewing job histories, and generating reports for analysis. This role is designed to give agents access only to the features they need for handling customer interactions efficiently.

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## Dashboard Access

When logged in, the CC Agent lands on the dashboard but sees **limited menu options** tailored to their role:

### Accessible Menus:

#### 1. Call Registration

- New Complaint/Job
- Upload by CSV
- Job History

#### 2. Reports

- Today's Reports
- All Reports

#### 3. Settings

- Preferences

#### 4. Search Bar

- To quickly locate customer records or job IDs

The screenshot shows the Customer Service Portal dashboard. On the left, there's a sidebar with a logo, main menu items like Dashboard, Call Registration, Complaint Reports, Preferences, and User Management, and settings. The main area has a header 'Customer Service Portal' and a search bar. A welcome message says 'Welcome back! Here's what's happening with your service requests.' Below are four cards: 'Total Customers' (1,234), 'Active Jobs' (89), 'Completed Jobs' (567), and 'Pending Jobs' (23). A 'Recent Activity' section lists three events: 'New complaint registered' (Customer: John Doe, 2 min ago), 'Engineer assigned' (Job ID: INT10625000001, 5 min ago), and 'Job completed' (Customer: Jane Smith, 10 min ago). There are also 'Quick Actions' buttons for Register Complaint, View Job History, Service Centers, and Manage Engineers.

## Call Registration

This is the primary work area for CC Agents.

### 1. New Complaint / Job Registration

- **Purpose:** Register individual complaints or service requests as they come in from customers.
- **Process:**

#### 1. Filling the Complaint / Job Sheet

The CC Agent gathers customer details over the phone and fills out the form:

##### Call Type\*

Select the type of call:

- Installation
- Reinstallation
- Demo
- Repairs

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## Request Information

Field	Details
Root Request ID*	Enter root-level request ID.
Customer Request ID*	Enter unique customer request number.
E-commerce ID*	Enter order ID (if applicable).
Estimated Product Delivery Date*	Enter date (dd-mm-yyyy).

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## Customer Information

Field	Details
Full Name*	Enter customer's name.
Mobile Number*	10-digit valid mobile number.
House/Flat No*	Address line 1.
Street, Area, Sector*	Address line 2.
Landmark	Optional landmark for easier identification.
Pin Code*	Auto-assigns Locality, City, and State.
Locality*, City*, State*	Auto-filled or selectable.

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## **Product Information**

<b>Field</b>	<b>Details</b>
Product Type*, Name*	Dropdown selection.
Brand*	Enter brand name (e.g., Samsung).
Model No.*	Enter model number.
Serial Number	Optional.
Date of Purchase*	dd-mm-yyyy format.
Warranty*	Select warranty status.
Symptoms*	Select issue from dropdown.

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## **Service Information**

<b>Field</b>	<b>Details</b>
Customer Available Date*	Date customer is available for visit.
Preferred Time Slot*	Dropdown (e.g., Morning, Afternoon).
Additional Comments	Any extra instructions.
Assign Service Partner*	Auto-assigned using pin code mapping.
Call Priority*	Select Normal or Urgent.

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## 2. Actions After Filling

Button	Action
Register Call & Save Product	Saves the complaint and product details.
Reset Form	Clears all fields for a new entry.

## 3. Outcome

- Complaint is registered.
- Product is linked to customer profile.
- Assigned service partner is notified.
- Job appears in **Job History**.

The screenshot shows the VSAT CRM Customer Service Portal. The main menu on the left includes options like Dashboard, Call Registration, New Complaint/Job (which is selected), Upload by CSV, Job History, Complaint Reports, Preferences, and User Management. The central area is titled 'Customer Service Portal' and 'New Complaint / Job Registration'. It has a sub-section 'Complaint / Job Sheet' with a 'Call Type' dropdown (Installation, Reinstallation, Demo, Repairs). Below it are sections for 'Request Information' (Root Request ID, Customer Request ID), 'E-commerce ID' (Enter e-commerce ID, Estimated Product Delivery Date dd-mm-yyyy), and 'Customer Information' (Full Name, Mobile Number). A header bar at the top right includes a search bar ('Search customers, jobs...'), a user icon ('anugya\_cc ccagent'), and a refresh button. A note at the top right says 'Register a new service request and automatically save product details'.

## 2. Upload by CSV

- **Purpose:** Upload multiple complaints at once (bulk registration).
- **Process:**

### 1. Download CSV Template

- Click **Download CSV Template** to get a sample CSV file.
- The template contains:
  - All required fields (e.g., Root Request ID, Customer Name, Mobile Number, Address, Product Details, etc.)
  - Example data to guide CC Agents in formatting their entries correctly.

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### 2. Prepare Your CSV File

- Open the downloaded template in Excel or Google Sheets.
- Fill in complaint/job data for multiple records:

Column	Example Data
Root Request ID	RQ123456
Customer Name	John Doe
Mobile Number	9876543210
Product Type	LED TV
Warranty Status	In Warranty
... (other required fields) ...	

- Save the file in **CSV format (.csv)** when done.

**Validation Tip:** Make sure there are no missing mandatory fields. Invalid rows will be rejected during upload.

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### 3.Upload the CSV File

- Click **Browse Files** or drag & drop your CSV file into the upload area.
  - The system will check the file format and display a preview of entries.
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### 4.Submit CSV

- After verifying the preview, click **Submit CSV**.
  - The system processes each row:
    - Successfully added complaints are registered immediately.
    - Rows with errors (e.g., missing pin code or invalid phone numbers) are flagged for correction.
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### 5.Outcome

- All valid complaints from the CSV file are added to the system in one operation.
- Registered jobs appear in **Job History** with their respective IDs.
- Service Partners are assigned automatically based on pin code mapping.

The screenshot shows the VSAT CRM Customer Service Portal. On the left is a sidebar with a logo, 'VSAT CRM Customer Dashboard', and a main menu with options like 'Dashboard', 'Call Registration', 'New Complaint/Job', 'Upload by CSV' (which is selected), 'Job History', 'Complaint Reports', 'Preferences', and 'User Management'. The main content area has a title 'Customer Service Portal' and a sub-section 'Upload Complaints by CSV'. It includes a search bar 'Search customers, jobs...', a user icon 'anugya\_cc ccagent', and a message 'Bulk upload new complaints/jobs using a CSV file'. Below this is a 'CSV Upload' section with 'Download Template' (link to 'Download CSV Template'), 'Upload CSV File' (a dashed box for file upload with a 'Browse Files' button), and a 'Submit CSV' button.

### 3. Job History

- **Purpose:** View previously registered complaints and their current statuses.
- **Process:**

#### 1. Search for Customer Jobs

At the top of the Job History page, there's a search form to locate jobs quickly.

Field	Description
Customer Name*	Enter customer's full or partial name to search records.
Mobile Number*	Enter the customer's 10-digit mobile number.
Pin Code*	Enter pin code to filter jobs by geographical area.

## 2.Buttons

Button	Action
Search Jobs	Searches the database for jobs matching entered criteria.
Clear Search	Resets the search form and shows all jobs again.

The screenshot shows the 'Customer Service Portal' interface. On the left is a sidebar with 'MAIN MENU' containing 'Dashboard', 'Call Registration' (with 'New Complaint/Job', 'Upload by CSV', and 'Job History' options), 'REPORTS' (with 'Complaint Reports'), 'SETTINGS' (with 'Preferences' and 'User Management'), and 'HELP'. The main area has a header 'Customer Service Portal' and a search bar 'Search customers, jobs...'. A user profile 'anugya.cc ccagent' is at the top right. Below the header is a section titled 'Job History' with the sub-instruction 'Search and track all service requests by customer details'. It features a search form with fields 'Customer Name\*' (containing 'Anugya'), 'Mobile Number\*' (containing '9084047926'), and 'Pin Code\*' (containing '246701'). At the bottom of the search form are 'Search Jobs' and 'Clear Search' buttons. The overall background is light grey with blue highlights for active links and buttons.

## 3.View Service Jobs Table

After performing a search (or by default), the system displays all matching jobs in a table.

## 4.Table Columns Explained

Column	Description
Job ID	Unique identifier for each complaint/job (e.g., #IN100725000001).

<b>Column</b>	<b>Description</b>
Customer Details	Shows customer name, mobile number, and pin code.
Service Type	Type of service (e.g., Installation, Reinstallation, Repairs, Demo).
Status	Current job status (e.g., Pending, Completed, Cancelled, Assigned).
Priority	Indicates urgency level (Normal or Urgent).
Technician	Name of assigned technician (if assigned). Shows “Not Assigned” otherwise.
Created Date	Date when the complaint/job was created.
Actions	Buttons for viewing or editing job details (availability depends on CC Agent permissions).

## 5.Example Table Row:

Service Jobs								Search in results...
Job ID	Customer Details	Service Type	Status	Priority	Technician	Created Date	Actions	
#IN140725000004	Anugya Mobile: 9084047926 Pin: 246701	Installation	UNASSIGNED	URGENT	Not Assigned	14/7/2025		

# Reports

CC Agents also have access to reporting tools for tracking complaint trends and performance.

## 1.Today's Reports

**Purpose:** Allows CC Agents to quickly download complaint/job data in CSV format for reporting, analysis, or sharing with management.

This feature simplifies tracking by providing **ready-to-download datasets** of complaints:

- Registered today
  - Or all complaints in the system
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### Step-by-Step Process

#### Download Today's Complaints

- Click **Download Today's Complaints.**
- The system generates a **CSV file** containing all complaints registered **on the current day**.

#### When to Use:

- To share daily updates with supervisors.
  - To analyze complaint volume for the day.
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#### Download All Complaints

- Click **Download All Complaints.**
- The system generates a **CSV file** containing **all complaints ever registered** in the system, regardless of date.

## When to Use:

- For monthly, quarterly, or annual reporting.
  - To perform trend analysis or check unresolved complaints.
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### Report File Details

The downloaded CSV file includes:

Column	Description
Job ID	Unique identifier of each complaint/job
Customer Details	Name, mobile number, address, pin code
Service Type	Installation, Reinstallation, Demo, Repairs
Status	Unassigned, Pending, Completed, Cancelled
Priority	Normal or Urgent
Assigned Technician Name	Name of assigned engineer (if any)
Created Date	Date complaint was registered

The screenshot shows the VSAT CRM Customer Service Portal interface. On the left, there is a sidebar with a tree menu. The 'REPORTS' section is expanded, showing 'Complaint Reports' with two options: 'Todays' and 'All'. The main content area has a title 'Complaint Reports' and a sub-section 'Download Complaint Report'. It includes a note 'Download complaints as CSV for today or all records', a 'Download Complaint Report' button with a filter icon, and two download buttons at the bottom: 'Download Today's Complaints' and 'Download All Complaints'. The top right corner shows a user profile for 'anugya\_cc'.

complaint_id	request_ty	root_requ	customer_ecom_ord	product_ty	call_priorit	req_creati	booking_d	booking_t	customer_city	pincode	mobile_nu	address	estimated_issue_type	product_n	symptoms	model_no	serial_nur	brand	date_of_p_w
IN140725 FIRST_TIM	3.55E+11	2.35E+12	4.57E+09	SMART RE	Urgent	2025-07-1 2025-07-1 2pm-4pm	Anugya Ag	Bijnor	246701	9.76E+09	16,Bijnor	2025-07-1 installatio	Wipro Smi	Engineer v	3.48E+09	AC534678	samsung	##### in	
IN140725 FIRST_TIM	2.35E+11	6.55E+12	2.35E+12	GATEWAY	Urgent	2025-07-1 2025-07-1 10am-1pm	Anugya	Bijnor	246701	9.08E+09	16, Bijnor,	2025-07-0 installatio	Wipro Gar	Engineer v	3.46E+11	CB456787	apple	##### in	

## 2. All Reports

**Purpose:** Enables CC Agents to download a **customized report** of complaints/jobs based on date range and complaint status.

This is useful for generating **historical reports** or sharing filtered data with management.

### Step-by-Step Process

#### 1. Select Date Range

- Use the **Start Date** and **End Date** fields to define the time period for which you want complaint data.
- Example: To view complaints from June 30, 2025 to July 14, 2025, set:
  - **Start Date:** 30-06-2025
  - **End Date:** 14-07-2025

## **2. Select Report Name (Status Filter)**

From the **dropdown menu**, choose a complaint/job status:

<b>Option</b>	<b>Description</b>
<b>Pending</b>	Shows all jobs currently pending resolution.
<b>OK</b>	Shows all jobs marked as resolved or Completed.
<b>Registered</b>	Shows all complaints that were registered successfully.
<b>Cancelled</b>	Shows all jobs that were cancelled before resolution.

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## **3. Download Report**

- After setting filters, click **Download Report**.
  - The system generates a **CSV file** containing all matching records within the selected date range and status.
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### **Report File Details**

The CSV file includes:

<b>Column</b>	<b>Description</b>
Job ID	Unique identifier of each complaint/job.
Customer Details	Name, mobile number, address, pin code.
Service Type	Installation, Reinstallation, Demo, Repairs.
Status	Pending, OK, Registered, or Cancelled.
Priority	Normal or Urgent.
Assigned Technician Name of assigned engineer (if any).	

Column	Description
Created Date	Date complaint was registered.

## Settings

- Limited to Preferences (e.g., changing password or notification preferences).

## User Management

**Purpose:** Allows CC Agents to securely change their login password to maintain account security.

This feature ensures that each CC Agent can manage their own credentials without administrator involvement.

### Step-by-Step Process

#### 1. Navigate to Change Password

- Go to the sidebar and select:  
**Settings → User Management → Change Password**

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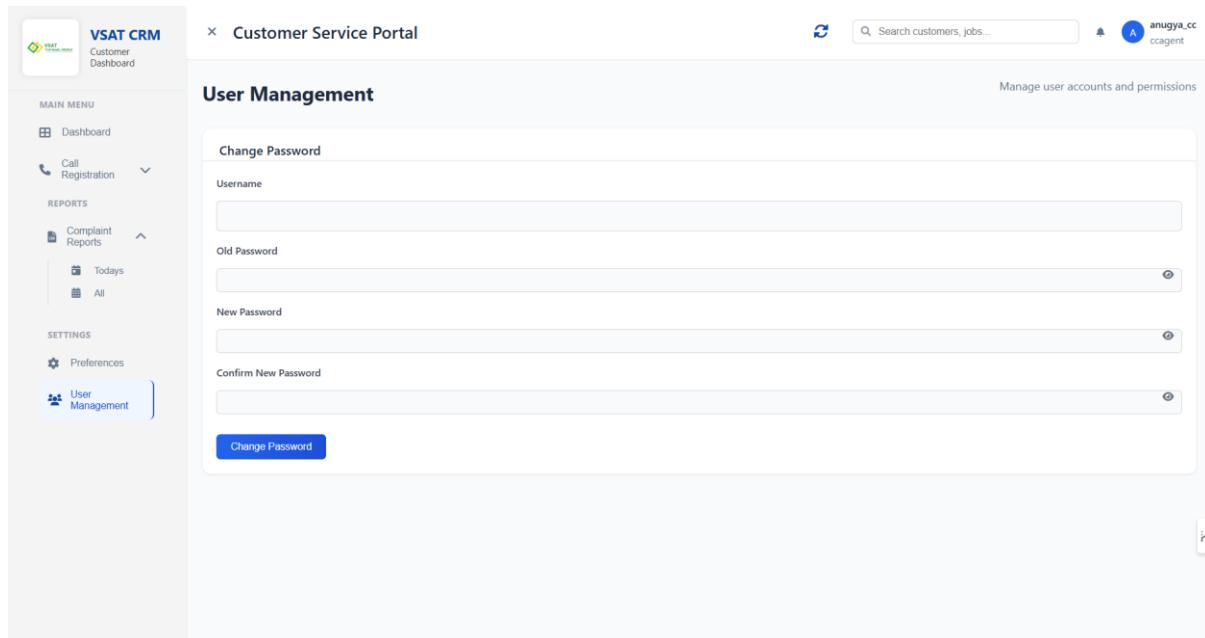
## 2. Enter Required Fields

Field	Description
Username	Displays your login username (read-only or editable based on system settings).
Old Password*	Enter your current password.
New Password*	Enter your desired new password.
Confirm New Password*	Re-enter the new password to confirm it matches.

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## 3. Submit Change

- After filling in all fields, click **Change Password**.



The screenshot shows the VSAT CRM Customer Service Portal interface. On the left, there's a sidebar with a logo, the title 'VSAT CRM Customer Dashboard', and a main menu with options like 'Dashboard', 'Call Registration', 'Reports' (with 'Complaint Reports' expanded to show 'Todays' and 'All'), 'Settings' (with 'Preferences' and 'User Management' expanded), and a search bar at the top right. The main content area is titled 'User Management' and contains a 'Change Password' form. The form has four input fields: 'Username' (disabled), 'Old Password', 'New Password', and 'Confirm New Password'. Below the fields is a blue 'Change Password' button. The top right of the main area has a user profile icon and the text 'anugya\_cc ccagent'.