

Migration Reversal

RPA Requirement Specification

Project Name : Migration Reversal

Business Owner : Clint Pereira

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Purpose of this document

The Process Design Document describes the business processes chosen for automation using the UiPath Robotic Process Automation (RPA) technology.

This document describes the sequence of steps performed as part of the process, as well as the conditions and requirements prior to its automation. This design document serves as a base documentation for developers to collect the details required for robotic automation of the same business process.

Document Control

This document contains proprietary Vodacom information. ALL INFORMATION CONTAINED HEREIN MUST BE TREATED CONFIDENTIALLY. This information must only be accessed by authorized individuals, in accordance with applicable policies.

Document Details

| | |
|---|------------------|
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Introduction

Executive Summary

Define the overview executive summary for the process being automated.

The Retentions Back Office team processes Service Requests to support customers who came through Vodacom Direct channel. This document specifically addresses the Service Requests related to reversal of migration orders that customers no longer want. The robot will access the service requests and process the migration reversals accordingly.

This happens, for example, when a customer who is on the Red 2.4GB 200min price plan is contacted by the Sales department and offered a Red 3.6GB 200min price plan where this customer is advised that this new offer will cost the same as their current price plan. A month later, this customer realises that they were misled and this new price plan (Red 3.6GB 200min) then the customer requests for this price plan change (migration) to be reversed.

Stakeholder Distribution & Approval List

The below sign-off is an indication that the above estimated business hours savings calculation has been explained to the below executives and all related parties are in agreement.

| Approver Name | Approver Role | Responsibility | Document Section | Review/Approve Record | Approval Date | Dev Estimate / Comments |
|------------------------------------|---|-------------------------|------------------------------|-----------------------|---------------|-------------------------|
| Clint Pereira | Business EHOD Manager | Review and Approve | Section 3 to 6 | Approved | 2024/02/05 | |
| Dean Gounder Dorah Molopane | Business Line Manager / SME / Product Owner | Review and Approve | All Document | Approved | 2024/02/05 | |
| | | Review and Approve | Solution Test Cases | | | |
| | | Review and Approve | Solution Acceptance Criteria | | | |
| | | Review and Approve | Section 3 to 6 | | | |
| Zezethu Nontshinga | Finance Business Partner | Review and Approve | All | | | |
| Bafana Makgetla | Automation Process Engineer | Review and Approve | | | | |
| Silindile Ndovela | Automation Business Analyst | Review and Approve | Section 3 to 6 | | 2024/01/30 | |
| Shaun Robertson | RPA Architect | TDD Discussion | | | 2024/01/11 | 2 Sprints |
| | RPA Architect | Code Review and Approve | | | | |
| Senzo Dlomo | RPA Developer | Review and Approve | | | 2024/02/05 | |

Pre-Due Diligence Analysis

Pre-Requisites

| Requirements | Yes/No | Comments |
|--|--------|---|
| SME Availability | Yes | |
| System(s) Access | Yes | C3D |
| System(s) Dependencies | No | |
| Possible System Changes (+/- 6 months) | No | |
| Current Business Process | Yes | |
| Project Communication Team | Yes | |
| Test Data | Yes | |
| Involvement of HR | No | |
| Involvement of Change Management | No | |
| New Automated Process Awareness | Yes | |
| Process Video Link | Yes | Migration Reversal-20240110_094618-Meeting Recording.mp4 Migration & Workload % -20240206_104434-Meeting Recording.mp4 |

Estimated Business Benefits Description

Outcome from the Pre-DD analysis

| Process Name | Process Description | Team Name | Average Volumes (PM) | %UI Path | % of OCR | Number Of FTE | Manual Turn Around Time | AVG Handling Time (Per Case) | Addressable Task Time (Min) | Monthly Hours Savings | Yearly Hours Savings | Automated Turn Around Time |
|--------------------|--|------------------------|----------------------|----------|----------|---------------|-------------------------|------------------------------|-----------------------------|-----------------------|----------------------|----------------------------|
| Migration reversal | Reversing migrations that are no longer required by customers. | Retentions Back Office | 846 | 100 | 0 | 25 | 5 | 5 | 5 | 71 | 846 | |

As-Is Process Description

As-Is Process Flow



As-Is Process Narration

| Step No. | Process Step Description |
|----------|---------------------------------------|
| 1 | Access the service request on Siebel. |

| Step No. | Process Step Description |
|----------|--|
| 2 | Analyse the service request. |
| 3 | Determine the Dealer ID. |
| 4 | Harvest the Initial Price Plan. |
| 5 | Process the Migration. |
| 6 | Waiver the Migration fee on the Quotation. |
| 7 | Submit the quotation. |
| 8 | Submit the order. |
| 9 | Provide customer feedback. |
| 10 | Close the Service Request. |

To-Be High Level Process Description

High Level Process Flow



High Level Process Narration

| Step No. | Process Step Description |
|----------|---|
| 1 | Access the service request on Siebel. |
| 2 | Analyse the service request. |
| 3 | Determine the Dealer ID. |
| 4 | Harvest the Initial Price Plan. |
| 5 | Process the Migration. |
| 6 | Waiver the Migration fee on the Quotation. |
| 7 | Submit the quotation. |
| 8 | Submit the order. |
| 9 | Determine if there are any credits to be passed. |
| 9a | If yes, process the credit on the applicable invoice. |
| 10 | Provide customer feedback. |
| 11 | Close the Service Request. |

In Scope RPA Automation

List of features that are in-scope for current development.

- Accessing the service requests.
- Reversing the migration.
- Waiving the migration fee.
- Checking for usage.
- Processing credit.
- Closing the service request.

Out Of Scope RPA Automation

List of features that are out of scope for current development, or which not include at current development and will be considered at a later stage

TBC

Application and DB Access Requirements

| APPLICATION ACCESS | | | | |
|--------------------|---|---------------------------------------|-------------------------|--|
| Application Name | Whitepages Resource Name | Whitepages Profile | Business Contact Person | |
| C3D | C3D SIEBEL INTERNAL - VODACOM DIRECT - BACK OFFICE - AUTO | Agent-VD Second Line | Dorah Molopyane | |
| C3D | C3D SIEBEL QUEUE - VODACOM DIRECT -BACK OFFICE - AUTO | Vodacom Direct Queue | Dorah Molopyane | |
| C3D | C3D SIEBEL INTERNAL - UPGRADEANDCANCELLATIONBACKOFFICE - AUTO | Agent - Upgrade and Cancellation - BO | Dorah Molopyane | |
| C3D | C3D SIEBEL INTERNAL - CUSTOMER CARE - CIC BO - AUTO | Supervisor - CIC BO Support | Dorah Molopyane | |

DB Connection Details Requirements

| DATABASE ACCESS | | | | |
|-----------------|----------|---------|------------------|-------------------------|
| System Name | Hostname | Port ID | SID/Service Name | Business Contact Person |
| N/A | | | | |

Business Reporting Requirements

Business report requirements. Report may also be used to track process post implementation

Report Fields Description

| Field Name | Mandatory | Source Field | Field Description |
|---------------------------|-----------|--------------|---|
| Transaction Date and Time | Yes | Orchestrator | System date and time when the BOT actioned this transaction |

| Field Name | Mandatory | Source Field | Field Description |
|---|-----------|--------------|---|
| Service Request Number | Yes | C3D Siebel | Migration reversal request |
| Service Request Description | Yes | C3D Siebel | The description of the service request |
| Account Number | Yes | C3D Siebel | Account number in question |
| MSISDN | Yes | C3D Siebel | Installed ID |
| Dealer ID | Yes | C3D Siebel | The dealer ID that processed the migration being reversed |
| Agent Username | Yes | C3D Siebel | The username of the agent that processed the migration being reversed |
| Channel | Yes | C3D Siebel | The Channel that processed the migration |
| Migration Reversal Created Date and Time | Yes | C3D Siebel | Date when the migration reversal was initiated |
| Migration Reversal Closed/Completed Date and Time | Yes | C3D Siebel | Date when the migration reversal was completed |
| From Price Plan and Cost | Yes | C3D Siebel | Price plan before the migration reversal and it's cost |
| To Price Plan and Cost | Yes | C3D Siebel | Price plan after the migration reversal and it's cost |
| Outcome | Yes | Orchestrator | Result of the migration reversal |
| Business Exception Reason | Yes | Orchestrator | CBU Retentions Back Office - Home (sharepoint.com) |

Report Samples

| Transaction Date and Time | Service Request Number | Account Number | MSISDN | Dealer ID | Agent Username | Channel | Migration Reversal Created Date | Migration Reversal Closed/Completed Date | From Price Plan and Cost | To Price Plan and Cost | Outcome |
|---------------------------|------------------------|----------------|-------------|-----------|----------------|----------------|---------------------------------|--|--------------------------------|--------------------------------|---------------------|
| 2024/01/16 06:20:00 | 5-36107511913178 | I0355489-8 | 27824413402 | RWRDC | RW_NDOVELSL | Vodacom Direct | 2024/01/16 06:33:13 | 2024/01/16 06:53:01 | RED 3.6GB 200min TopUp R583,00 | RED 1.2GB 200min TopUp R415,00 | Successful / Failed |

To-Be Detailed Process

Detailed Process Flow



Solution Configurable Input Values (Process Assets)

The table below contains input parameters to be used in the solution. This prevents hardcoding in the solution, and allows flexibility on input parameter changes

| Ref Number | Field Name | Field Value |
|-------------|----------------------------------|---|
| MGRE-IP-001 | C3D Siebel Application | https://www.c3d-crm.vodacom.co.za |
| MGRE-IP-002 | C3D Siebel Bot Username | CBU02 |
| MGRE-IP-003 | C3D Siebel Bot Password | |
| MGRE-IP-004 | C3D Support Email address | ISDopssouth@vodacom.co.za |
| MGRE-IP-005 | Business Email address | migrationscbu02@vodacom.co.za; |
| MGRE-IP-006 | C3D Siebel Support | siebelsupport@vodacom.co.za |
| MGRE-IP-007 | Filter Status | Open |
| MGRE-IP-008 | Filter Area | VODACOM DIRECT |
| MGRE-IP-009 | Filter Type | CONTRACT MANAGEMENT |
| MGRE-IP-010 | Filter Sub Type | MIGRATION |
| MGRE-IP-011 | Filter Sub Status | Unassigned |
| MGRE-IP-012 | Re-Route Area | RETENTIONS TRADE PARTNER |
| MGRE-IP-013 | Re-Route Type | CONTRACT MANAGEMENT |
| MGRE-IP-014 | Re-Route Sub Type | MIGRATION |
| MGRE-IP-015 | SR Description Keywords | Migration / Migrated/ Migration reversal/ Migrating/ Migrating back |
| MGRE-IP-016 | Sharepoint Location for Reports | CBU Retentions Back Office - Home (sharepoint.com) |
| MGRE-PD-016 | Page Duty Application Exceptions | 3 |

Business Exceptions Handling

This table list all possible business exceptions and how they should be mitigated

| Exception ID | Process Name | Process Step Name | Business Exception | Exception Handling | Pager Duty |
|--------------|----------------------|-------------------------------|------------------------------------|--|------------|
| MGRE-BE-001 | Log in to C3D Siebel | Access C3D Siebel Application | C3D Siebel Application Unavailable | If Siebel application is unavailable (that is it shows a different page other than the C3D Siebel Login page) Try loading C3D Siebel application 3 more times | Yes |

| Exception ID | Process Name | Process Step Name | Business Exception | Exception Handling | Pager Duty |
|--------------|-----------------------------|-----------------------------|-----------------------------|--|------------|
| | | | | <p>If still unable to load the Siebel application after the third (3rd) time, then</p> <p>Log a request with C3D Siebel support (MGRE-IP-006) and support (MGRE-IP-004) via email and copy Business (MGRE-IP-005)</p> <p>Close all opened applications.</p> <p>Terminate the entire process</p> <p>Set the process run time to error</p> <p>Else</p> <p>Proceed with Logging on C3D Siebel Application</p> <p>Email structure</p> <p>Subject: Automated Migration Reversal</p> <p>Body: Good day,</p> <p>The bot couldn't access the C3D Siebel application.</p> | |
| MGRE-BE-002 | Log in to C3D Siebel | Incorrect Login Credentials | Incorrect Login Credentials | <p>Try 2 more times, and if still receiving incorrect username or password error, then</p> <p>Send an email notification to Siebel support (MGRE-IP-006) and support (MGRE-IP-004) via email and copy Business (MGRE-IP-005) stating that the Migration Reversal Bot could not login on C3D Siebel due to possible credentials issue,</p> <p>Then Terminate the process</p> <p>Close all opened web browsers</p> <p>Email structure</p> <p>Subject: Automated Migration Reversal</p> <p>Body: Good day,</p> <p>The bot couldn't access the C3D Siebel application.</p> | Yes |
| MGRE-BE-003 | Log in to C3D Siebel | OTP not received | OTP not received | <p>The bot will wait for 2 mins then click Send OTP to email</p> <p>if not found again,</p> <p>Send an email notification to support (MGRE-IP-006) via email and copy Business (MGRE-IP-004) stating that the IP Talk Order Capture Bot could not login on Siebel due to possible OTP issue,</p> <p>Then Terminate the process</p> <p>Close all opened web browsers</p> <p>Email structure</p> <p>Subject: Automated Migration Reversal</p> <p>Body: The bot couldn't find the TOTP</p> | Yes |
| MGRE-BE-004 | Log in to C3D Siebel | Incorrect OTP | Incorrect OTP | <p>Request OTP not more than 3 times, if OTP not working after 3 attempts, then</p> <p>Send an email notification to support (MGRE-IP-006) via email and copy Business (MGRE-IP-004) stating that the IP Talk Order Capture Bot could not login on Siebel due to possible OTP issue,</p> <p>Then Terminate the process</p> <p>Close all opened web browsers</p> <p>Email structure</p> <p>Subject: Automated Migration Reversal</p> <p>Body: The bot couldn't login to Siebel due to incorrect OTP</p> | Yes |
| MGRE-BE-005 | Analyse the Service Request | Blank Installed ID field | Blank Installed ID field | <p>Analyse the Service Request description, and if there is an MSISDN on the description, then</p> <p>On the Installed ID field, select this MSISDN on the list</p> <p>Else</p> <p>Re-route the SR to</p> <p>Area: RETENTIONS TRADE PARTNER (MGRE-IP-012)</p> <p>Type: CONTRACT MANAGEMENT (MGRE-IP-013)</p> <p>Sub Type: MIGRATION (MGRE-IP-014)</p> <p>Then move to the next Service Request</p> | |
| MGRE-BE-006 | Analyse the Service Request | No Keywords Found | No Keywords Found | <p>Analyse the Service Request description for keywords (MGRE-IP-015), if there are no keywords found,</p> <p>Then</p> <p>Re-route the SR to</p> <p>Area: RETENTIONS TRADE PARTNER (MGRE-IP-012)</p> <p>Type: CONTRACT MANAGEMENT (MGRE-IP-013)</p> <p>Sub Type: MIGRATION (MGRE-IP-014)</p> <p>Then move to the next Service Request</p> | |
| MGRE-BE-007 | Navigate to Orders | No Migration Order found | No Migration Order found | <p>Re-route the SR to</p> <p>Area: RETENTIONS TRADE PARTNER (MGRE-IP-012)</p> <p>Type: CONTRACT MANAGEMENT (MGRE-IP-013)</p> <p>Sub Type: MIGRATION (MGRE-IP-014)</p> <p>Then move to the next Service Request</p> | |
| MGRE-BE-008 | Credit Vet notification | Vetting Status Not Approved | Vetting Status Not Approved | <p>Re-route the SR to</p> <p>Area: RETENTIONS TRADE PARTNER (MGRE-IP-012)</p> <p>Type: CONTRACT MANAGEMENT (MGRE-IP-013)</p> <p>Sub Type: MIGRATION (MGRE-IP-014)</p> <p>Then move to the next Service Request</p> | |

| Exception ID | Process Name | Process Step Name | Business Exception | Exception Handling | Pager Duty |
|--------------|---------------------------|----------------------------------|----------------------------------|--|------------|
| | | | | <u>Else</u> Proceed with accepting the Credit Vet notification | |
| MGRE-BE-009 | Provide Customer Feedback | Customer Email Address Not found | Customer Email Address Not found | If the Recipient Email address is not available, <u>Then</u> Send an SMS | |

Monitoring & Alerts (PagerDuty)

| Alert # | Alert Description | Monitoring Frequency | Alert Audience |
|---------|--|-------------------------------------|--|
| 1 | Failure to login on Siebel Application | On every attempt to login on Siebel | |
| 2 | 5 Consecutive Application Exceptions | Every hour between 08:00 and 18:00 | |
| 3 | SR's not being processed. This can be determined by looking at the last processed SR vs SR queue to be processed. There should not be more than 2 hour gap between the last processed SR vs the oldest SR in the pending queue | Every hour between 08:00 and 18:00 | |
| 4 | When there are 50 or more SRs in the pending queue | Every hour between 08:00 and 18:00 | Dorah Molopyane Dean Gounder Vera Majola Melody Satekge Olga Hans Sindile Ndovela |
| 5 | When there are SRs not processed with a creation date of 4 days and older from current date. This is meant to monitor agreed SLA | Every day, once a day | |
| 6 | No new SR received for the past 2 days from current date | Every day, once a day | |

API Integration Configuration

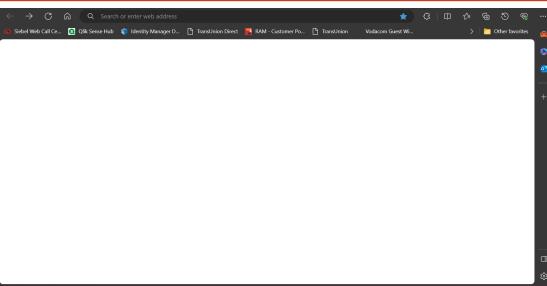
This section lists the API's needed for this solution (if any), and the list of information the API should contain

Detailed Process Steps

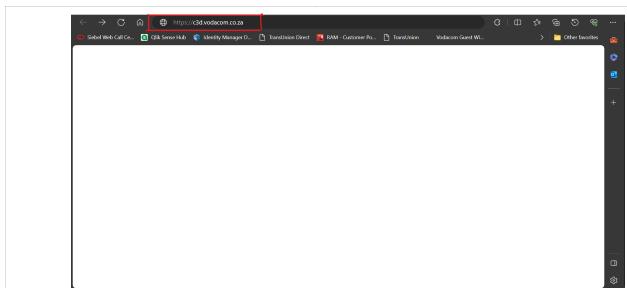
Log in to C3D Siebel

[Log in to C3D Process Flow](#)



| Open Web Browser | |
|---|----------------------------|
|  | |
| Process Narrative | |
| Open the Web browser | |
| Robot Action | |
| Field | Robot Action (Data Source) |
| | |
| | |

Enter the C3D Siebel Application Address



Process Narrative

Type in the Siebel C3D application address

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |
| | |

Log in to C3D

Process Narrative

Enter the username and password.

Click Sign-in.

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |
| | |

Log in authentication

Process Narrative

Enter the OTP.

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |
| | |

Home Page View

voogle C3D

My Service Requests

My Orders

| Order No. | Mode | Priority | Date Created |
|--------------|------------|----------|------------------|
| S-0017147044 | Console | Medium | 2024-01-14 10:25 |
| S-0017147045 | Console | Medium | 2024-01-14 10:25 |
| S-0017147046 | Console | Medium | 2024-01-14 10:25 |
| S-0017147047 | Pulse Open | Medium | 2024-01-14 10:25 |
| S-0017147048 | Pulse Open | Medium | 2024-01-14 10:25 |

My Quotes

| Request | Quote No. | Name | Opportunity | Date Created |
|---------|--------------|--------------|-------------|--------------|
| 1 | S-0017147049 | S-0017147049 | 2024-01-10 | |
| 1 | S-0017147050 | S-0017147050 | 2024-01-10 | |
| 1 | S-0017147051 | S-0017147051 | 2024-01-10 | |
| 1 | S-0017147052 | S-0017147052 | 2024-01-10 | |
| 1 | S-0017147053 | S-0017147053 | 2024-01-10 | |

Wizards

- New Location
- Create Offer & Send
- Open Log
- Print
- Print Preview

Dealer Selection

Change Dealer Name

Dealer Name: Vodafone Direct - Bulk Office
Offer Type: Vodafone Direct - Bulk Office
User Name: Vodafone Direct - Bulk Office
Channel: Channel

Installed ID

Validate Voucher

- Open Voucher
- Print Voucher

Process Narrative

C3D opens up to the home page.

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Check and Filter SRs

Check and Filter SR Process Flow



voogle C3D

Navigating to Service Requests

My Service Requests

My Orders

| Order No. | Mode | Priority | Date Created |
|--------------|------------|----------|------------------|
| S-0017147044 | Console | Medium | 2024-01-14 10:25 |
| S-0017147045 | Console | Medium | 2024-01-14 10:25 |
| S-0017147046 | Console | Medium | 2024-01-14 10:25 |
| S-0017147047 | Pulse Open | Medium | 2024-01-14 10:25 |
| S-0017147048 | Pulse Open | Medium | 2024-01-14 10:25 |

My Quotes

| Request | Quote No. | Name | Opportunity | Date Created |
|---------|--------------|--------------|-------------|--------------|
| 1 | S-0017147049 | S-0017147049 | 2024-01-10 | |
| 1 | S-0017147050 | S-0017147050 | 2024-01-10 | |
| 1 | S-0017147051 | S-0017147051 | 2024-01-10 | |
| 1 | S-0017147052 | S-0017147052 | 2024-01-10 | |
| 1 | S-0017147053 | S-0017147053 | 2024-01-10 | |

Wizards

- New Location
- Create Offer & Send
- Open Log
- Print
- Print Preview

Dealer Selection

Change Dealer Name

Dealer Name: Vodafone Direct - Bulk Office
Offer Type: Vodafone Direct - Bulk Office
User Name: Vodafone Direct - Bulk Office
Channel: Channel

Installed ID

Validate Voucher

- Open Voucher
- Print Voucher

Process Narrative

Click on the Service Requests tab.

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Navigating to My Queued Service Requests

voogle C3D

Frequently Viewed Service Requests

- My Service Requests
- My Orders
- My Quotes
- My Service Requests

Recent Records

- 1. S-0017147044
- 2. S-0017147045
- 3. S-0017147046
- 4. S-0017147047
- 5. S-0017147048

skip

Process Narrative

Click on the My Queued SR's tab.

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

| | |
|--|--|
| | |
|--|--|

All Service Requests page view

This screenshot shows a list of service requests. The columns include: ID, Priority, Status, Type, Description, SLA Date, Created, Due Date, Case Number, and Region. The status column shows various states like Open, Pending, and Closed. The type column includes entries like 'VODACOM DIRECT', 'ARTIME TRANSFER', and 'ARTIME ADVOCATE'. The description column contains detailed descriptions of each request.

Process Narrative

C3D will then open up all Service Requests

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Query Service Requests

This screenshot shows a list of service requests similar to the previous one, but with additional columns: Sub Status and Due Date. The sub status column provides more granular information about the request's status. The due date column indicates when the request was due to be resolved.

Process Narrative

Click on the Query tab.

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Enter Service Requests Query

This screenshot shows a search interface for entering service requests. It includes fields for ID, Priority, Status, Type, Description, SLA Date, Created, Due Date, Sub Status, Case Number, and Region. Below the search bar, there are several sections: Service Request Information (with dropdowns for Area, Incident ID, Ad phone no., Contract, Defer, Date it was updated by, Escalated, and Out of Service To Date), Details (with dropdowns for Priority, Sub Type, Severity, SLA Date, Description, Case Number, Customer Care ID, Parent Case ID, Preferred Contact Method, Non-Contractor Info, and Case Status), Status (with dropdowns for Status, Sub Status, Case Status, and Case Resolution), and Special Instructions (with dropdowns for Open, Unassigned, and Case Resolution).

Process Narrative

Filter Status and select Open

Filter Area and select Vodacom Direct

Filter Type and select Contract Management

Filter Sub Type and select Migration
Filter Sub Status and select Unassign

| Robot Action | |
|--------------|----------------------------|
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Confirm the Filter

Process Narrative

Click Go

| Robot Action | |
|--------------|----------------------------|
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Sort

Process Narrative

Click on Created and filter by the ascending order

| Robot Action | |
|--------------|----------------------------|
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Open SR

Open SR Process Flow



Select the Service Request

Service Requests

| ID | Area | Type | Sub Type | Description | SLA Date | Created | Group | Sub Status | Committed Date | Trouble Ticket No. | Region |
|----------------------|---------------|---------------------|-----------|--|---------------------|---------------------|-----------------------|------------|----------------|--------------------|--------|
| S-301070000000000000 | VISCOM DIRECT | CONTRACT MANAGEMENT | MIGRATION | In Team please review migration issue | 2024/01/10 16:44:38 | 2024/01/10 16:44:38 | Indaison Direct Queue | Unassigned | | | |
| S-301070000000000001 | VISCOM DIRECT | CONTRACT MANAGEMENT | MIGRATION | Dear Sirs Please assist the customer | 2024/01/10 16:45:38 | 2024/01/10 16:45:38 | Indaison Direct Queue | Unassigned | | | |
| S-301070000000000002 | VISCOM DIRECT | CONTRACT MANAGEMENT | MIGRATION | Please assist with references 10-0002 | 2024/01/10 17:14:46 | 2024/01/10 17:14:46 | Indaison Direct Queue | Unassigned | | | |
| S-301070000000000003 | VISCOM DIRECT | CONTRACT MANAGEMENT | MIGRATION | Dear Sirs Kindly assist with launching | 2024/01/10 18:04:38 | 2024/01/10 18:04:38 | Indaison Direct Queue | Unassigned | | | |
| S-301070000000000004 | VISCOM DIRECT | CONTRACT MANAGEMENT | MIGRATION | Dear Sirs Please assist in migrating the | 2024/01/10 18:05:38 | 2024/01/10 18:05:38 | Indaison Direct Queue | Unassigned | | | |
| S-301070000000000005 | VISCOM DIRECT | CONTRACT MANAGEMENT | MIGRATION | Dear Sirs kindly assist by reviewing the | 2024/01/10 18:06:38 | 2024/01/10 18:06:38 | Indaison Direct Queue | Unassigned | | | |

Service Request Information

| | | | | | |
|-------------------------|--------------------------|--------------------------|---------------------------------------|--------------------------|---------------------|
| All phone no. | 274204274 | Area | VISCOM DIRECT | Details | Status |
| Contact | Exxon Dealer | Type | CONTRACT MANAGEMENT | Priority | Unassigned |
| Account name | Exxon Dealer | Sub-Type | MIGRATION | Severity | Unknown |
| Exxon Dealer | | Description | In Team please review migration issue | SLA Date | Open |
| Dealer ID | 000000000000000000 | Parent SR# | 10 | Created | 2024/01/10 16:44:38 |
| Dealer ID / Customer ID | | Call Back Method | SMS | Customer ID | 2024/01/10 16:44:38 |
| Escalated | <input type="checkbox"/> | Non-Conformance Off Flag | <input type="checkbox"/> | Preferred Contact Method | |
| Request | <input type="checkbox"/> | Quota No. | | Address | |
| Date Approve To Close | <input type="checkbox"/> | Committed Date | | Requester | |
| Last SR ID | 000000000000000000 | Network Address | | Return Number | |
| | | | | Valid No. | |

Process Narrative

Click on the first Service Request number

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |

Service Request Selected

Service Request Information

| | | | | | |
|--------------------------|--------------------------|-----------------------|------------------------------------|----------------------|---------------------|
| All phone no. | 274204274 | Area | VISCOM DIRECT | Detail | Status |
| Contact | Exxon Van Culler | Type | CONTRACT MANAGEMENT | Priority | Unassigned |
| Account name | Exxon Van Culler | Sub-Type | MIGRATION | Severity | Unknown |
| Exxon Van Culler | | Description | Please assist with migration issue | SLA Date | Open |
| Dealer ID | 000000000000000000 | Parent SR# | 10 | Created | 2024/01/10 16:44:38 |
| Dealer ID / Customer ID | | Customer ID | 2024/01/10 16:44:38 | Customer Comm ID | 2024/01/10 16:44:38 |
| Escalated | <input type="checkbox"/> | Quota No. | | Reason Reason | |
| Request | <input type="checkbox"/> | Committed Date | | Region | |
| Date Approve To Close | <input type="checkbox"/> | Confirmation Status | | OIDPerson No | |
| Last SR ID | 000000000000000000 | Network Address | | Return Number | |
| Non-Conformance Off Flag | <input type="checkbox"/> | Document Verification | | Valid No. | |
| Last SR ID | 000000000000000000 | Call Back Details | | Call Back Method | |
| | | | | Call Back Period | |
| | | | | Call Back Start Date | |
| | | | | Call Back End Date | |

Activities

| New | From | To | Priority | Activity | Activity Description | Comments | Owner | Transferred | Submitted | Entered | Audit Trail |
|----------|---------------------|--------------|----------|-----------------|----------------------|---|-------|-------------|-----------|---------------------|-------------|
| Created | 2024/01/10 16:44:38 | Team - Owner | Normal | Assign Activity | Assign Activity | Dear Exxon Customer, A service request has been created. | | | | 2024/01/10 16:44:38 | |
| Modified | 2024/01/10 16:45:38 | Team - Owner | Normal | Assign Activity | Assign Activity | Dear Exxon Customer, A service request has been modified. | | | | 2024/01/10 16:45:38 | |

Process Narrative

C3D will then open up to the service request selected.

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |

Assign SR

Assign SR



Assign the Service Request

Service Request Information

Detail

Status

Special Instructions

Call Back Details

Activities

Process Narrative

Click on the 'Amend/Work SR' to take ownership of the service request

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |
| | |

Save Record

Service Request (SR#1)

Detail

Status

Special Instructions

Call Back Details

Activities

Process Narrative

Click Menu and select Save Record

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |
| | |

Selected Record Modification Notification

selectedUser.vodacom.co.za says

The selected record has been modified by another user since it was reviewed. Please consider Get Latest

OK

Service Request Information

Detail

Status

Special Instructions

Call Back Details

Activities

Process Narrative

If the selected record modification notification pop-ups, then click OK

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |
| | |

Establish Request Intent

Establish Request Intent



Analyse the Service Request

The screenshot shows a service request analysis interface. Key details include:

- Service Request Information:** Installed ID: 270414402, Type: CONTRACT MANAGEMENT, Sub-Type: MIGRATION.
- Detail:** Priority: 1-Medium, Severity: 1-Medium, SLA-Schl: 0001482.
- Status:** Status: Open, Soll Status: Assigned, Group: Violation Direct Queue, Owner: MOHIVSL.
- Customer:** Customer ID: 3-CM99000001, Customer Name: Werner Van Coder.
- Activity Log:** Shows activity steps like 'Open' and 'Close' with dates and users.

Process Narrative

Note the installed ID (MSISDN in question) and analyse the service request description.

Description has to contain keywords: Migration / Migrated/ Migration reversal/ Migrating/ Migrating back **MGRE-IP-015

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Go to Customer Account

Go to Customer Account Process Flow



Navigating to the Customer's Account

The screenshot shows a customer account navigation interface. Key details include:

- Service Request Information:** Installed ID: 270414402, Type: CONTRACT MANAGEMENT, Sub-Type: MIGRATION.
- Detail:** Priority: 1-Medium, Severity: 1-Medium, SLA-Schl: 0001482.
- Status:** Status: Open, Soll Status: Assigned, Group: Violation Direct Queue, Owner: MOHIVSL.
- Customer:** Customer ID: 3-CM99000001, Customer Name: Werner Van Coder.
- Activity Log:** Shows activity steps like 'Open' and 'Close' with dates and users.

Process Narrative

Click on the Customer Account tab.

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Selected Record Modification Notification

Process Narrative

If the selected record modification notification pop-ups, then click Ok

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |

Subscriber's Account Access Notification

Process Narrative

If a Subscriber's account access notification pops-up, then click Ok

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |

Harvest Information from Previous Migration Order

Harvest Information from Previous Migration Order Process Flow



Navigate to Orders

Process Narrative

On the Customer's Account, scroll down to 'Orders'.

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |

The screenshot shows the Oracle Database Migration Assistant (DMA) interface. The main title bar reads "Verify information on the previous Migration Order". The menu bar includes File, Edit, View, Homepage, Query, Tools, Help, and Find. The toolbar has icons for New, Open, Save, Print, Copy, Paste, Undo, Redo, Refresh, Homepage, Database Resources, Database Health, Monitoring, Planning, Reporting, Security, User Management, and Help.

The main workspace displays several tabs: "Migration Order", "Migration Plan", "Migration Task", "Migration Log", "Migration Status", "Migration Report", "Migration Metrics", and "Migration History".

A specific migration task is selected, showing details like:

- Migration Order:** Oracle DB 12c to 19c - 1 CDB
- Source Database:** ORCLDB12C
- Target Database:** ORCLDB19C
- Task Type:** Data Pump
- Task Status:** Active
- Start Date:** 2023-04-01 11:15:49
- Last Update:** 2023-04-01 11:15:49
- Completion Status:** PHASE_1_COMPLETED
- Progress:** 100%

The interface also includes sections for "Product & Services User" (with a "Run Profile" dropdown), "Billing Profile" (with a "Run Profile" dropdown), and "Billing Items" (with a "Run Profile" dropdown).

Process Narrative

Verify:

The 'Order Sub Type' (has to be 'Migration/ Hybrid2Post/ Post2Hybrid')

The Status (has to be 'Complete')

The Installed ID (has to be the one on the SR installed ID/ SR Description)

The Channel (has to be Vodacom Direct/ Upgrade Sales)

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Process Narrative

Click on the Order no.

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Navigate to Line Items

The screenshot shows the 'Line Items' tab of an order management system. It includes fields for Order Number, Account ID, First Name, Last Name, Status, and various payment and shipping details. A large grid table on the right displays line item details such as Product ID, Qty, and Unit Price.

Process Narrative

On the Previous Migration Order

Click on Line Items

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Harvest the previous Price Plan

The screenshot shows the 'Line Items' tab of an order management system. It includes fields for Order Number, Account ID, First Name, Last Name, Status, and various payment and shipping details. A large grid table on the right displays line item details such as Product ID, Qty, and Unit Price.

Process Narrative

Copy the deleted Price Plan

(Product item displayed under Action as Deleted)

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Navigate Back to Customer's Account

The screenshot shows the 'Line Items' tab of an order management system. It includes fields for Order Number, Account ID, First Name, Last Name, Status, and various payment and shipping details. A large grid table on the right displays line item details such as Product ID, Qty, and Unit Price.

Process Narrative

Scroll up the page,

Click on Customer Account

| Robot Action | |
|--------------|----------------------------|
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Subscriber's Account Access Notification

File Edit View Navigate Query Tools

siebel.iam.voda.com.co.za says

Subscriber's account has been accessed 9 times today.

OK

Account Details

Customer Comms

Account Name: [REDACTED]
Street Name:
Town/City:
Country:
Postal Code:
Service Provider:
Anonymous:
Do Not Delete Flag:
Finance Deal Indicator:

Primary Contact: [REDACTED]
Primary Phone No: [REDACTED]
Cell Phone No: [REDACTED]
Alternate Phone No: [REDACTED]
Email: [REDACTED]
Collection Status: CURRENT
Arrears: [REDACTED]
Tariff Limit: [REDACTED]

Line 500 Debtor ID: [REDACTED]
Account Type: [REDACTED]
PTC: [REDACTED]
ID/Passport No.: [REDACTED]
Status: [REDACTED]
NFS Score: [REDACTED]
NFS Value: [REDACTED]
Portfolio Number: [REDACTED]

VAT Registration Number: [REDACTED]
Account Locked: Lock Amount: [REDACTED]

Process Narrative

If a Subscriber's account access notification pops-up, then click 'OK'

Else the Customer Account will display

| Robot Action | |
|--------------|----------------------------|
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Customer's Account View

File Edit View Navigate Query Tools

Customer Info

Customer Details: [REDACTED]
Primary Contact: [REDACTED]
Primary Phone No: [REDACTED]
Cell Phone No: [REDACTED]
Alternate Phone No: [REDACTED]
Email: [REDACTED]
Collection Status: CURRENT
Arrears: [REDACTED]
Tariff Limit: [REDACTED]

Line 500 Debtor ID: [REDACTED]
Account Type: [REDACTED]
PTC: [REDACTED]
ID/Passport No.: [REDACTED]
Status: [REDACTED]
NFS Score: [REDACTED]
NFS Value: [REDACTED]
Portfolio Number: [REDACTED]

VAT Registration Number: [REDACTED]
Account Locked: Lock Amount: [REDACTED]

Customer Comms

Customer Details: [REDACTED]
Comments: [REDACTED]
Category: [REDACTED]
Sub-Category: [REDACTED]

Service Requests

| ID | Details | Description | Resolution | User | Special Indicators | Serial | Address Type | IP/Geo-Address | Last Date |
|------------|------------|-------------|------------|------------|--------------------|------------|--------------|----------------|------------|
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |

Process Narrative

C3D Siebel will then open the Customer's Account

| Robot Action | |
|--------------|----------------------------|
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Generate the Migration Reversal Quote

Generate the Migration Reversal Quote Process Flow



Navigate to Products and Services Owner Payer

Process Narrative

Scroll up to Product & Services Owner Payer list applet

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Select the MSISDN in question

This screenshot shows a complex user interface for managing mobile services. At the top, there's a navigation bar with links like File, Edit, View, Register, Query, Print, Help, and Exit. Below it is a toolbar with icons for Home, Accounts, Customers, Agreements, Activities, Orders, Quotes, Sales, Order Tools, Service Requests, Customer Details, Pending Inquiry, Loyalty Rewards, Search, 3G Coverage, My Company, Help, New Landing Page, and Edit Branches.

The main area contains several tables and search functions:

- Service Requests:** A table showing requests with columns: ID Number, Status, Created, Area, Type, Sub-type, Description, Resolution, Owner, Special Instructions, Group, Address Type, GPS Co-ordinates, and Latitude.
- Product & Services-Center Portal:** A table showing products with columns: Name, Product ID, Installed ID, Billing Profile, Start Date, Projected Income Amount, Average Monthly, Previous, Due for Upgrade, Summer Deal, Requested Date, Dealer Name, Dealer ID, Due Status, Deal ID, and Asset ID.
- JAU Sales Dashboard:** A table showing sales data with columns: Agent Name, Number Of Sales (e), Commercial (e), AHS (e), AHS (s), and AHS (t). It includes a chart showing Sales by Month.
- Print & Services User:** A table showing users with columns: Name, Promotion ID, Installed ID, Status, Billing Profile, Start Date, and Promotion. It includes a link to Print & Services Service Requests.

At the bottom, there are footer sections for Footer Elements and Footer Information, along with a footer copyright notice: © 2013 All rights reserved. Developed by iGlobe Solutions.

Process Narrative

Click on the block with the MSISDN in question (next to the price plan Name)

If this is not available on this initial Product & Services Owner Payer view, then use the down arrow to scroll to it.

Then Click on the Migration tab

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

The screenshot shows the SAP Fiori Launchpad with a red banner at the top containing the text "Load the previous price plan (a)". Below the banner, there is a search bar and a list of actions categorized under "Apparel". One action, "Load the previous price plan (a)", is highlighted with a blue box. The background shows other actions like "Create New Price Plan", "View Current Price Plan", and "View Previous Price Plan".

Process Narrative

On the Promotion Migration pop-up:

Type in/Paste the previous price plan

Type in/ Paste

| Robot Action | |
|--------------|----------------------------|
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Load the previous price plan (b)

The screenshot shows a software interface with a search bar at the top. Below it is a grid of search results for 'Promotion Migration'. The columns include 'Promotion Name', 'Priority', 'Product ID', 'Commission Start', and 'Status'. One row is highlighted in yellow, showing 'PDI 2 & Q1 Admin Top Up' as the promotion name, 'Priority 1' as the priority, '2024010001' as the product ID, '2024-01-01' as the commission start date, and 'Active' as the status.

Process Narrative

If no price plan populates (this will mean that the specific price plan has been discontinued)

Click Cancel

Then re-route the SR

| Robot Action | |
|--------------|----------------------------|
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Confirm the previous price plan

The screenshot shows a software interface with a search bar at the top. Below it is a grid of search results for 'Promotion Migration'. The columns include 'Promotion Name', 'Priority', 'Product ID', 'Commission Start', and 'Status'. One row is highlighted in yellow, showing 'PDI 2 & Q1 Admin Top Up' as the promotion name, 'Priority 1' as the priority, '2024010001' as the product ID, '2024-01-01' as the commission start date, and 'Active' as the status.

Process Narrative

With the price plan populated

Click 'OK'

| Robot Action | |
|--------------|----------------------------|
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Accept the Migration fee

The screenshot shows a software application window with a central message box. The message reads: "A commitment has been broken for Product ID 6000 which contains a migration fee. You can either accept this migration fee or cancel this product with a loss of \$1,000.00." Below the message are two buttons: "Accept" and "Cancel".

Process Narrative

On the Broken Commitment pop-up:

Click 'Accept'

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |

Waiver the Migration Fee

Waiver the Migration Fee Process Flow



The screenshot shows a software application window titled "Navigate to Line Items". It displays a list of line items for a specific quote. One item is highlighted in yellow: "R002-L400-K001 Topic" with a status of "In Progress". The table includes columns for Line Item #, Product, Status, Quantity, Due Date, Billing Profile, Selected Bill Card, Billing Card, Over Charge, Waiver Amount, Manual Price Details, Monthly Cost, Retention Checked, and Waiver CB.

Process Narrative

A migration quote window will then display

Under Line Items:

Click on the arrow to expand the Hybrid Mobile Phone Service option

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |

Navigate to the Migration Fee field

Process Narrative

Using the down-arrow, scroll to Migration Fee

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |

Select the Migration Fee field

Process Narrative

Click on Migration fee
Then scroll down to Line Item Detail

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |

Waiver the Migration Fee (a)

Process Narrative

Copy the amount on the Final Cost Incl. VAT field

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |

Process Narrative

Copy the amount on the Final Cost Incl. VAT field

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |

Waiver the Migration Fee (b)

File Edit View Navigate Query Tools Help Find

Line Item Detail

| | |
|---|---|
| Item Header | Pricing Details |
| Line No. 17 Sequence: 114 Due Date: 2024-02-01 00:00:00 | Status: In Progress Type: Product Waiver Amount: R0.00 Starting Cost: R600.00 Final Cost Incl VAT: R1,562.50 |
| Product Detail | Comments: |
| Product: Migration Fee Product Code: VD000000996 | Vodacom CIB: R0.00 Vodacom CIB Difference: Dealer CIB: |
| Eligibility Status: | Eligibility Comments: |

Process Narrative

Paste this amount on the Waiver Amount field

Then click anywhere on the screen

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Migration fee Waived

File Edit View Navigate Query Tools Help Find

Line Item Detail

| | |
|---|--|
| Item Header | Pricing Details |
| Line No. 17 Sequence: 114 Due Date: 2024-02-01 00:00:00 | Status: In Progress Type: Product Waiver Amount: R0.00 Starting Cost: R649.18 Final Cost Incl VAT: R0.00 |
| Product Detail | Comments: |
| Product: Migration Fee Product Code: VD000000996 | Vodacom CIB: R0.00 Vodacom CIB Difference: Dealer CIB: |
| Eligibility Status: | Eligibility Comments: |

Process Narrative

Then click anywhere on the screen (and the Final Cost Incl. VAT field will display R0.00)

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Process the Migration Quote

Process the Migration Quote Process Flow



Navigate to the Top of the Migration Quote

File Edit View Navigate Query Tools Help Find

Quote

| | |
|--|--|
| General | Details |
| Quote No: 5-SE100017546953 Dealer ID: UPSRA Dealer Name: EDCO-BD On Behalf Of User: Channel: Upgrade Sales Sales Agent: UTHOLSU Store Location: Vetting Status: Vetting Reason Code: | Account Name: Catherine Pels First Name: Catherine Last Name: Pels Quote Status: In Progress Status Changed: 2024-02-01 17:08:16 Quote Sub Type: Migration Disconnect Reason: Media Code: Fulfillment Store Dealer Id: Store Name: |
| Date Created: 2024-02-01 Created By: NOVELSL Last Modified By: NOVELSL Start Date: 2024-02-01 Due Date: 2024-02-01 Expires: 2024-02-15 Partner Loyalty Number: Customer Initiated Due Check: <input type="checkbox"/> | Price List: CBO Price List Next Invoice Once Off: R0.00 Monthly Cost: R348.93 Dealer CIB: R0.00 Discount Reason: <input type="checkbox"/> Uphold Once Off: R0.00 FAX Documents: <input type="checkbox"/> Fraud Reason: <input type="checkbox"/> User ID: Total UFP Account 1: Total UFP Account 2: UFP Conditions MET: UFP Transaction ID: |

Process Narrative

Scroll up to the top of the page

Robot Action

Field

Robot Action (Data Source)

Fill in the Disconnection Reason

The screenshot shows a software application window titled 'Quote'. In the 'General' section, the 'Vetting Status' dropdown is set to 'Incorrect package'. In the 'Reason' dropdown, the option 'UPGRA' is selected. The 'Media Code' field also contains 'UPGRA'.

Process Narrative

Use the drop-down arrow to select Incorrect package

Robot Action

Field

Robot Action (Data Source)

Fill in the Media Code

The screenshot shows a software application window titled 'Quote'. In the 'General' section, the 'Vetting Status' dropdown is set to 'incorrect storage'. In the 'Reason' dropdown, the option 'UPGRA' is selected. The 'Media Code' field also contains 'UPGRA'.

Process Narrative

Use the drop-down arrow to select UPGRA

Robot Action

Field

Robot Action (Data Source)

Validate the Credit Vetting Status



Quota

| General | | Details | | Sales | | Customer | | Inventory | | Logistics | |
|-------------------------|------------------------|-----------------------|---------------------|-----------------------------|------------|------------------------|----------------|------------------|-------|-----------------------------|------|
| Quota ID | 1-88101749855 | Account Name | Catherine Path | Date Created | 2024-02-01 | Price List | CPO Price List | Next Invoice Due | 00:00 | Stock Level | High |
| Dealer ID | 1UPGSA | First Name | Catherine | Created By | 1000105SL | Unit | EA | Monthly CPO | 00:00 | Min Stock | 0 |
| Quoted Dealer ID | | Middle Name | | Last Name | | Doc Type | | Expiry Date | | Max Stock | 1000 |
| Quoted Dealer Name | | Suffix | | Quota Status | Open | Quota Type | Migration | Discount (%) | 00:00 | Current Stock | 0 |
| On-Behalf Of User | | Quota Status Change | 2024-02-01 17:18:08 | Partner License Number | | Uptime Check | 00:00 | Uptime Check Due | 00:00 | Customer Initiated DocCheck | |
| Channel | | Quota Type | Migration | Quota Line Number | | Fax Documents | | Printed | | Printed At | |
| Update Status | | Cancellation Reasons | | Quota Line Type | Migration | Printed At | | Used At | | Total UPP Amount | 1 |
| Sales Agent | 1UPGSA (1UPGSA) | Disconnection Reasons | | Customer Initiated DocCheck | | Total UPP Amount 1 | | | | Total UPP Amount 2 | 2 |
| Status Location | | Item Return Reasons | | Printed At 1 | | UPP Credit Balance MET | | | | UPP Transaction ID | 1 |
| Shipping Status | | Item Return Type | | Printed At 2 | | UPP Transaction MET | | | | UPP Transaction ID 1 | 1 |
| Valuing Status | | Model Code | UPGSA | Printed At MET | | UPP Transaction MET | | | | UPP Transaction ID MET | 1 |
| Valuing Preference Code | | Model Code ID | | Printed At MET 1 | | UPP Transaction MET 1 | | | | UPP Transaction ID MET 1 | 1 |
| | Fullfillment Status ID | Store Name | | Printed At MET 2 | | UPP Transaction MET 2 | | | | UPP Transaction ID MET 2 | 1 |

Process Narrative

Click Validate

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |

Process Narratives

• 九 • 五

Robot Action

| Robot Action | |
|--------------|----------------------------|
| Field | Robot Action (Data Source) |
| | |
| | |

[Submit the Migration Quote](#)

[Submit the Migration Quote Process Flow](#)



The screenshot shows the SAP Fiori Launchpad with the application 'Set the Migration Due Date' selected. The application interface includes a header with 'Set the Migration Due Date', a toolbar with various icons, and a main content area with tabs like 'General', 'Details', 'Phased', and 'Phased Details'. The 'General' tab is active, displaying fields such as 'Quote ID' (I-360716510102), 'Dealer ID' (VWTC), 'Dealer Dealer ID' (VWTC), 'On Behalf Of Client' (VWTC), 'Sales Agent' (VWTC), 'Store Location' (VWTC), 'Billing Status' (Open), and 'Billing Reason Code'. The 'Details' tab shows a customer record for 'Herman Van Celler' with address information. The 'Phased' tab displays a timeline from '2024-01-01' to '2024-01-31' with phases: 'Initial', 'Preparation', 'Implementation', and 'Review'. The 'Phased Details' tab provides more detail for each phase, including tasks like 'Define Scope', 'Identify Resources', 'Develop Plan', etc., with checkboxes for completion.

| Process Narrative | |
|---|----------------------------|
| <p>With the Vetting Status on 'Approved': On the Due Date field, click on the calendar icon and set the date to the last day of the month</p> | |
| Robot Action | |
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

| Submit the Migration Order | |
|----------------------------|--|
| | |

| Process Narrative | |
|------------------------------|----------------------------|
| <p>Click on Manual Order</p> | |
| Robot Action | |
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Submit the Migration Order
Submit the Migration Order Process Flow



| Navigate to the Top of the Migration Order | |
|--|--|
| | |

| Process Narrative | |
|--|----------------------------|
| <p>Scroll up to the top of the page/window</p> | |
| Robot Action | |
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Submit the Migration Order

This screenshot shows the 'Submit the Migration Order' window. It contains several tabs: General, Details, POS/CS, and PX/CS. The General tab includes fields for Order No., Dealer ID, Dealer Name, On Behalf Of User, Channel, Sales Agent, Store Location, Type, Delivery Status, S&D Order Number, and Ship Delivery Date. The Details tab shows a list of items with columns for Line No., Product, Item/Order ID, Action, Status, Promotion, Due Date, Weight, Net, Description, Billing Profile, Quantity, Manual Discount %, Billing Cost, Manual Price/Unit, Change Cost/Unit, and Serial. The PX/CS tab includes fields for First Name, Last Name, Status, Submitted By, Due Date, Document Attachment, Partner Loyalty Number, RICA Verification Flag, Order Type, Media Code, and Fulfillment Store Dealer ID. The PX/CS tab also has sections for Skip Vetting Documents Validation, Fax/Vetting Documents and/or Agreement, Cancel Reason, Fraud Reason, User ID, and Date/Time.

Process Narrative

A new Migration Order window will then be loaded
Click 'Submit' to process the order

Robot Action

| Field | Robot Action (Data Source) |
|---------------------------|----------------------------|
| Notification Method | |
| Notification Method Email | |
| Notification Method Phone | |

Migration Reversal Completed

This screenshot shows the 'Migration Reversal Completed' window, which is very similar in structure to the 'Submit the Migration Order' window. It includes tabs for General, Details, POS/CS, and PX/CS. The General tab contains fields for Order No., Dealer ID, Dealer Name, On Behalf Of User, Channel, Sales Agent, Store Location, Type, Delivery Status, S&D Order Number, and Ship Delivery Date. The Details tab lists items with columns for Line No., Product, Item/Order ID, Action, Status, Promotion, Due Date, Weight, Net, Description, Billing Profile, Quantity, Manual Discount %, Billing Cost, Manual Price/Unit, Change Cost/Unit, and Serial. The PX/CS tab includes fields for First Name, Last Name, Status, Submitted By, Due Date, Document Attachment, Partner Loyalty Number, RICA Verification Flag, Order Type, Media Code, and Fulfillment Store Dealer ID. The PX/CS tab also has sections for Skip Vetting Documents Validation, Fax/Vetting Documents and/or Agreement, Cancel Reason, Fraud Reason, User ID, and Date/Time.

Process Narrative

Migration complete and the order is on the Future Open status pending 2024/01/31

Robot Action

| Field | Robot Action (Data Source) |
|---------------------------|----------------------------|
| Notification Method | |
| Notification Method Email | |
| Notification Method Phone | |

Navigate back to the Customer's Account

This screenshot shows the 'Navigate back to the Customer's Account' window, which is identical in structure to the other migration windows. It includes tabs for General, Details, POS/CS, and PX/CS. The General tab contains fields for Order No., Dealer ID, Dealer Name, On Behalf Of User, Channel, Sales Agent, Store Location, Type, Delivery Status, S&D Order Number, and Ship Delivery Date. The Details tab lists items with columns for Line No., Product, Item/Order ID, Action, Status, Promotion, Due Date, Weight, Net, Description, Billing Profile, Quantity, Manual Discount %, Billing Cost, Manual Price/Unit, Change Cost/Unit, and Serial. The PX/CS tab includes fields for First Name, Last Name, Status, Submitted By, Due Date, Document Attachment, Partner Loyalty Number, RICA Verification Flag, Order Type, Media Code, and Fulfillment Store Dealer ID. The PX/CS tab also has sections for Skip Vetting Documents Validation, Fax/Vetting Documents and/or Agreement, Cancel Reason, Fraud Reason, User ID, and Date/Time.

Process Narrative

Click Customer Account

| Robot Action | |
|--------------|----------------------------|
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Provide Customer Feedback

Provide Customer Feedback Process Flow



Navigate back to the Service Request

Process Narrative

Scroll down to Service Requests

| Robot Action | |
|--------------|----------------------------|
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Select the Service Request

Process Narrative

Click on the SR Number

| Robot Action | |
|--------------|----------------------------|
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Navigate to the Email Portal

Process Narrative

Click File
Select 'Send Email'

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |
| | |

Select the Recipient

Process Narrative

Highlight 'Service Request Contact' then click on Ok

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |
| | |

Compose Customer Feedback

Process Narrative

On the Email subject field, type in/paste the SR number
On the Email body, type in
Dear Valued Customer,
The migration back to the Red Flexi 140 price plan on 27646526619 has been processed. Please note that this will go through on 31/01/2024.
The migration fee has been waived.
Regards,
Retentions Second Line Support

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |
| | |

Send Feedback

Service Request Information:

- ID: 0-0000000000000000
- Name: RETENTION-SALES-01
- Type: UPRADE-REBATE
- Sub-Type: UPRADE-REBATE
- Description: Good Day
- Parent ID: 10
- Customer: Pratima Banerjee
- Device ID: 10403
- Enabled: Yes
- Request: No
- Created Date: 2024-01-10 10:14
- Cost Approval To Close: No
- Confirmation Status: Document Verification
- Non-Compliance SR Flag: No
- Line SR ID: 1000000000000000

Status:

- Status: In Progress
- Sub-status: Accepted
- Group: Selection Trade Partner
- Owner: MOHANLAL

Special Instructions:

- Created By: MOHANLAL
- Return Number: 10
- Wadhi No:

Call Back Details:

- Call Back Method: SMS
- Call Back Phone: 9898989898
- Call Back E-Mail: mohanlal@domain.com

Activities:

| Date | Activity Plan | Type | Activity Description | Department | Submitted | Approved | Rejected |
|---------------------|---------------|--------|----------------------|------------|-----------|----------|----------|
| 2024-01-10 10:14:00 | Customer | Search | Customer Search | Sales | 1 | 0 | 0 |
| 2024-01-10 10:14:00 | Customer | Search | Customer Search | Sales | 1 | 0 | 0 |

Process Narrative

Click Send

Robot Action

Field

Robot Action (Data Source)

Close the Service Request

Close the Service Request Process Flow

Accept the Service Request

Service Request Information:

- ID: 0-0000000000000000
- Name: RETENTION-SALES-01
- Type: UPRADE-REBATE
- Sub-Type: UPRADE-REBATE
- Description: Good Day
- Parent ID: 10
- Customer: Pratima Banerjee
- Device ID: 10403
- Enabled: Yes
- Request: No
- Created Date: 2024-01-10 10:14
- Cost Approval To Close: No
- Confirmation Status: Document Verification
- Non-Compliance SR Flag: No
- Line SR ID: 1000000000000000

Status:

- Status: Open
- Sub-status: Accepted
- Group: Selection Trade Partner
- Owner: MOHANLAL

Special Instructions:

- Created By: MOHANLAL
- Return Number: 10
- Wadhi No:

Call Back Details:

- Call Back Method: SMS
- Call Back Phone: 9898989898
- Call Back E-Mail: mohanlal@domain.com

Activities:

| Date | Activity Plan | Type | Activity Description | Department | Submitted | Approved | Rejected |
|---------------------|---------------|--------|----------------------|------------|-----------|----------|----------|
| 2024-01-10 10:14:00 | Customer | Search | Customer Search | Sales | 1 | 0 | 0 |
| 2024-01-10 10:14:00 | Customer | Search | Customer Search | Sales | 1 | 0 | 0 |

Process Narrative

On the Status field: Select 'In Progress'

If the Status field is already on 'In Progress', then move to Sub status field

On the Sub status field: Select 'Accepted'

Robot Action

Field

Robot Action (Data Source)

Save the Accepted Service Request

Service Request Information:

- ID: 0-0000000000000000
- Name: RETENTION-SALES-01
- Type: UPRADE-REBATE
- Sub-Type: UPRADE-REBATE
- Description: Good Day
- Parent ID: 10
- Customer: Pratima Banerjee
- Device ID: 10403
- Enabled: Yes
- Request: No
- Created Date: 2024-01-10 10:14
- Cost Approval To Close: No
- Confirmation Status: Document Verification
- Non-Compliance SR Flag: No
- Line SR ID: 1000000000000000

Status:

- Status: In Progress
- Sub-status: Accepted
- Group: Selection Trade Partner
- Owner: MOHANLAL

Special Instructions:

- Created By: MOHANLAL
- Return Number: 10
- Wadhi No:

Call Back Details:

- Call Back Method: SMS
- Call Back Phone: 9898989898
- Call Back E-Mail: mohanlal@domain.com

Activities:

| Date | Activity Plan | Type | Activity Description | Department | Submitted | Approved | Rejected |
|---------------------|---------------|--------|----------------------|------------|-----------|----------|----------|
| 2024-01-10 10:14:00 | Customer | Search | Customer Search | Sales | 1 | 0 | 0 |
| 2024-01-10 10:14:00 | Customer | Search | Customer Search | Sales | 1 | 0 | 0 |

Process Narrative

Click Customer Account

Robot Action

Field

Robot Action (Data Source)

| | |
|--|--|
| | |
|--|--|

Update the Resolution

The screenshot shows the 'Service Request Detail' screen. In the 'Detail' section, the 'Resolution' field is set to 'Migration reversed as requested.' Other fields like 'Area', 'Type', and 'Status' are also visible.

Process Narrative

On the Resolution field: Type in 'Migration reversed as requested.'

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Complete the Service Request

The screenshot shows the 'Service Request Detail' screen. In the 'Status' section, the status is set to 'Completed'. Other fields like 'Area', 'Type', and 'Resolution' are also visible.

Process Narrative

On the Status field, select Complete

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Approve Service Request for Closure

The screenshot shows the 'Service Request Detail' screen. In the 'Status' section, the status is set to 'Approved'. Other fields like 'Area', 'Type', and 'Resolution' are also visible.

Process Narrative

Tick Cust. Approval To Close

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Close the Service Request

The screenshot shows the ServiceNow interface for a service request. The top navigation bar includes links for Home, Log In, Logout, Query, Help, and Find. The main title is "Service Request - 10000000000000000000000000000000". The left sidebar has sections for Requests, Catalog, Applications, System, and Utilities. The main content area is titled "Detail" and displays the following information:

| | |
|-----------------------|----------------------------------|
| Area | RETENTION SALES & C. |
| Request ID | 10000000000000000000000000000000 |
| Type | UPGRADE |
| Sub-Type | UPGRADE REVERSAL |
| Priority | Normal |
| Due Date | 2024-01-10 12:00:00 |
| Parent DRN | 00000000000000000000000000000000 |
| Group | AB |
| Security | Internal |
| SLA Due Date | 2024-01-10 12:00:00 |
| Created | 2023-01-10 10:00:00 |
| Customer Contact ID | 10000000000000000000000000000000 |
| Requester | Test User |
| Requester Name | Test User |
| Requester Email | testuser@nowhere.com |
| Requester Phone | 1234567890 |
| Customer Name | Customer Test |
| Customer Address | 2024-01-10 12:00:00 |
| Confirmation Status | Pending |
| Document Verification | None |

Status: **Completed** (with a red error icon)

Sub-status: **Cancelled** (with a red error icon)

Group: **AB** (with a red error icon)

Special Instructions: **MELLETSKJOLM**

Created By: **MEILLETSKJOLM**

Requester: **Test User**

Requester Email: **testuser@nowhere.com**

Requester Phone: **1234567890**

Call Back Details:

| | |
|-----------------|------------|
| Callback Method | 0000 |
| Call Back Phone | 0000000000 |
| Call Back Date | 0000-00-00 |

Buttons at the bottom include: Activities, Search, Create, Add, Delete, Refresh, and Close.

Process Narrative

On the Status field, select 'Closed'

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Process Narrative

A closed service request displays

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |

Re-route the Service Request

Re-route the Service Request Process Flow



The screenshot shows the SAP Fiori Launchpad interface. At the top, there's a search bar and a navigation bar with links like Home, Logon, Logout, Help, and Logoff. The main area features a large red banner with the text "Navigate to Service Requests". Below the banner is a grid of cards representing different applications. One card for "Service Requests" is highlighted with a yellow border. Other visible cards include "SAP Fiori Home", "SAP Fiori Help", "SAP Fiori Logon", "SAP Fiori Logoff", "SAP Fiori Logout", "SAP Fiori Search", and "SAP Fiori Search Help". The bottom of the screen shows the SAP logo and navigation icons.

| Process Narrative | |
|---------------------------------|----------------------------|
| Scroll down to Service Requests | |
| Robot Action | |
| Field | Robot Action (Data Source) |
| | |
| | |

| Select the Service Request | |
|----------------------------|--|
| | |

| Process Narrative | |
|------------------------------------|----------------------------|
| Click on the SR number in question | |
| Robot Action | |
| Field | Robot Action (Data Source) |
| | |
| | |

| Create an Activity | |
|--------------------|--|
| | |

| Process Narrative | |
|-------------------|----------------------------|
| Under Activities | |
| Click New | |
| Robot Action | |
| Field | Robot Action (Data Source) |
| | |
| | |

| Process the Activity | |
|----------------------|--|
|----------------------|--|

Process Narrative

On Type: Select 'To be re-assigned'

On Comments/Reasons: Select 'Incorrect Area'

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |
| | |

Save Activity Record

Process Narrative

Click Menu

Select Save Record

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |
| | |

Copy Service Request Number

Process Narrative

With the Sub status displaying 'To be Reassigned'

Copy the SR number (ID)

| Robot Action | |
|--------------|----------------------------|
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Navigate to Queued SRs

The screenshot shows a web-based application for managing service requests. At the top, there's a header with various menu items like Home, Help, New, Refresh, Open, Save, Print, and Find. Below the header, there's a form for 'Service Request Information' with fields for ID, Area (selected as 'INCIDENT'), Type (selected as 'INTEGRATION'), Resolution (Priority: 3 Medium), SLA (SLA-type: 3 Medium, SLA-date: 2024-03-10 13:27:05, Estimated: 2024-03-10 13:27:05), and Status (Status: To be assigned, Sub status: Incident Direct Update, Owner: 404LEVEL, Please assist:). The main area displays a table of activities for each service request, with columns for Activity, Activity Date, Activity No., Activity Description, and Duration.

| Process Narrative | |
|---------------------|----------------------------|
| Click My Queued SRs | |
| Robot Action | |
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Query the Service Request

The screenshot shows a web-based application for managing service requests. At the top, there's a header with various menu items like Home, Help, New, Refresh, Open, Save, Print, and Find. Below the header, there's a form for 'Service Requests' with fields for Owner (404LEVEL), Area (selected as 'INCIDENT'), Type (selected as 'INTEGRATION'), Sub type (selected as 'INTEGRATION'), Description (Please assist are you connected to project car and make any config), SLA date (2024-03-10 13:27:05), Created (2024-03-10 13:27:05), Group (Contract Admin Queue), and Sub status (Integrated). The main area displays a table of activities for each service request, with columns for Owner, Area, Type, Sub type, Description, SLA date, Created, Group, Sub status, and Contact date.

| Process Narrative | |
|-------------------|----------------------------|
| Click on Query | |
| Robot Action | |
| Field | Robot Action (Data Source) |
| | |
| | |
| | |

Enter the SR Number

Process Narrative

Paste the copied service request number

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |
| | |

Closed Service Request View

Process Narrative

Click Go

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |
| | |
| | |

Filter Area

Process Narrative

On the Area field

Select RETENTIONS TRADE PARTNER

Robot Action

| Field | Robot Action (<i>Data Source</i>) |
|-------|-------------------------------------|
| | |

Filter Type

Process Narrative

On the Type field

Select CONTRACT MANAGEMENT

Robot Action

| Field | Robot Action (<i>Data Source</i>) |
|-------|-------------------------------------|
| | |

Filter Sub Type

File Edit Home Query Tools View

Service Requests

Search

Service Requests

Details

Description: Initial charge data is RETURNED as com package has BEEN 02-2014-01-12 07:00. Incident Detail Details

Date Created: 2014-01-12 07:00

Type: CONTRACT MANAGEMENT

Status: PENDING TERMINATION

Priority: Medium

Severity: Medium

SLA Date: 2014-01-12 12:27:35

Created: 2014-01-12 07:00

Last Updated: 2014-01-12 07:00

Owner: No Owner

Created By: No Owner

Modified By: No Owner

Requester: No Requester

Return Address: No Return Address

Reason: No Reason

Return Number: No Return Number

Warranty No: No Warranty No

Details

Description: Initial charge data is RETURNED as com package has BEEN 02-2014-01-12 07:00. Incident Detail Details

Date Created: 2014-01-12 07:00

Type: CONTRACT MANAGEMENT

Status: PENDING TERMINATION

Priority: Medium

Severity: Medium

SLA Date: 2014-01-12 12:27:35

Created: 2014-01-12 07:00

Last Updated: 2014-01-12 07:00

Owner: No Owner

Created By: No Owner

Modified By: No Owner

Requester: No Requester

Return Address: No Return Address

Reason: No Reason

Return Number: No Return Number

Warranty No: No Warranty No

Service Request Information

ID: 30112314175005

Requester: No Requester

All phone no.: 030348891

Contact: Maria De Inza

Account name: Maria De Inza

Owner: No Owner

Created By: No Owner

Escalated: No Escalated

Date Created: 2014-01-12 07:00

Cost Approve To Close: No Cost Approve To Close

Non-Compliance DR Flag: No Non-Compliance DR Flag

Call Back Method: RTR

Call Back Date: 2014-01-12 07:00

Comments: Initial charge data is RETURNED as com package has BEEN 02-2014-01-12 07:00.

Comments Date: 2014-01-12 07:00

Process Narrative

On the Sub Type field

Select MIGRATION

Robot Action

| Field | Robot Action (<i>Data Source</i>) |
|-------|-------------------------------------|
| | |
| | |

Navigate to Save Record

Service Requests

| Open | Avg. | SLA Number | Priority | Status | Area | Type | Sub Type | Description | SLA Date | Created | Group | Sub Group | Committed |
|------|------|------------|----------|--------|------|------|----------|-------------|----------|---------|-------|-----------|-----------|
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Service Request Information

| | | | | | |
|--|-------------------------------|--|-------------------------------|---------------------------------------|--------------------------------------|
| Request ID: 5-001001170005 | Area: RETENTION TRADE PAYMENT | Type: CONTRACT MANAGEMENT | Sub Type: MIGRATION | Resolution: Pending | Special Instructions: Please assist. |
| All phone no: 0000000000 | Site Type: SEARCH | Description: KODI charge issue in 0000000000 | SLA Date: 2024-03-10 13:27:58 | Sub Status: To be Reviewed | Owner: 10 |
| Contact: Manu De Rock | Customer Name: Manu De Rock | Parent SRN: 5-001001170005 | Created: 2024-03-10 13:27:58 | Group: Incident Detail Queue | Owner ID: 10 |
| Account name: Manu De Rock | Customer ID: 5459100208 | Preferred Contact Method: Email | Customer Cntrct: 5459100208 | Traceable Ticket Master #: 5459100208 | Region: 10 |
| Dealer ID: VODCOM | Call Back Method: SMS | Address: 10 | Report Reason: 10 | Created By: 10 | Return Number: 10 |
| Dealer is customer by: Escalated: <input type="checkbox"/> | Escalation Flag: 0000 | Network Address: 10 | Network No: 10 | Report Date: 2024-03-10 13:27:58 | |
| Received: <input type="checkbox"/> | Date No: 10 | | | | |
| Commented By: Escalated: <input type="checkbox"/> | Date No: 10 | | | | |
| Commented Date: 2024-03-10 13:27:58 | | | | | |

Process Narrative

Click Menu

Robot Action

Field

Robot Action (Data Source)

Save Record

| Open | Avg. | SLA Number | Priority | Status | Area | Type | Sub Type | Description | SLA Date | Created | Group | Sub Group | Committed |
|------|------|------------|----------|--------|------|------|----------|-------------|----------|---------|-------|-----------|-----------|
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Service Requests

| | | | | | |
|--|-------------------------------|--|-------------------------------|---------------------------------------|--------------------------------------|
| Request ID: 5-001001170005 | Area: RETENTION TRADE PAYMENT | Type: CONTRACT MANAGEMENT | Sub Type: MIGRATION | Resolution: Pending | Special Instructions: Please assist. |
| All phone no: 0000000000 | Site Type: SEARCH | Description: KODI charge issue in 0000000000 | SLA Date: 2024-03-10 13:27:58 | Sub Status: To be Reviewed | Owner: 10 |
| Contact: Manu De Rock | Customer Name: Manu De Rock | Parent SRN: 5-001001170005 | Created: 2024-03-10 13:27:58 | Group: Incident Detail Queue | Owner ID: 10 |
| Account name: Manu De Rock | Customer ID: 5459100208 | Preferred Contact Method: Email | Customer Cntrct: 5459100208 | Traceable Ticket Master #: 5459100208 | Region: 10 |
| Dealer ID: VODCOM | Call Back Method: SMS | Address: 10 | Report Reason: 10 | Created By: 10 | Return Number: 10 |
| Dealer is customer by: Escalated: <input type="checkbox"/> | Escalation Flag: 0000 | Network Address: 10 | Network No: 10 | Report Date: 2024-03-10 13:27:58 | |
| Received: <input type="checkbox"/> | Date No: 10 | | | | |
| Commented By: Escalated: <input type="checkbox"/> | Date No: 10 | | | | |
| Commented Date: 2024-03-10 13:27:58 | | | | | |

Process Narrative

Click Save Record

Robot Action

Field

Robot Action (Data Source)

Re-Routed SR View

| Open | Avg. | SLA Number | Priority | Status | Area | Type | Sub Type | Description | SLA Date | Created | Group | Sub Group | Committed |
|------|------|------------|----------|--------|------|------|----------|-------------|----------|---------|-------|-----------|-----------|
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Service Requests

| | | | | | |
|--|-------------------------------|--|-------------------------------|---------------------------------------|--------------------------------------|
| Request ID: 5-001001170005 | Area: RETENTION TRADE PAYMENT | Type: CONTRACT MANAGEMENT | Sub Type: MIGRATION | Resolution: Pending | Special Instructions: Please assist. |
| All phone no: 0000000000 | Site Type: SEARCH | Description: KODI charge issue in 0000000000 | SLA Date: 2024-03-10 13:27:58 | Sub Status: Unresolved | Owner: 10 |
| Contact: Manu De Rock | Customer Name: Manu De Rock | Parent SRN: 5-001001170005 | Created: 2024-03-10 13:27:58 | Group: Incident Detail Queue | Owner ID: 10 |
| Account name: Manu De Rock | Customer ID: 5459100208 | Preferred Contact Method: Email | Customer Cntrct: 5459100208 | Traceable Ticket Master #: 5459100208 | Region: 10 |
| Dealer ID: VODCOM | Call Back Method: SMS | Address: 10 | Report Reason: 10 | Created By: 10 | Return Number: 10 |
| Dealer is customer by: Escalated: <input type="checkbox"/> | Escalation Flag: 0000 | Network Address: 10 | Network No: 10 | Report Date: 2024-03-10 13:27:58 | |
| Received: <input type="checkbox"/> | Date No: 10 | | | | |
| Commented By: Escalated: <input type="checkbox"/> | Date No: 10 | | | | |
| Commented Date: 2024-03-10 13:27:58 | | | | | |

Process Narrative

With the Status back to Open

Move to the Next SR

Robot Action

| Field | Robot Action (Data Source) |
|-------|----------------------------|
| | |
| | |

Business Report

Business Report Output as in **Business Report Requirement** Section above. This can also be used to track process post implementation performance

Process Test Cases

Test Conditions

The below table indicates that agreed test scenarios that will be processed by the automation in order to successfully pass the testing phase.

| Test Component | TC # | Test Type | Pre-Condition | Scenario Description | Expected Result | Test Status | Actual Results | Comments |
|---|------|-----------|--|--|--|-------------|----------------|----------|
| Go to C3D Siebel | 1 | Positive | Access to the browser | C3D Siebel available Login to C3D Siebel TOTP found | Logged in successfully into C3D Siebel | | | |
| Go to C3D Siebel | 2 | Negative | Access to the browser | C3D Siebel unavailable Can't login to C3D Siebel TOTP not found | Throw an exception | | | |
| Query Service Requests and Select a SR | 3 | Positive | Logged into C3D Siebel | Targeted service requests list populated Service Request selected and opened | Service Request opened successfully | | | |
| Query Service Requests and Select a SR | 4 | Negative | Logged into C3D Siebel | Targeted service requests list not populated Cannot select a Service Request and cannot open it | Throw an exception | | | |
| Analyse the Service Request | 5 | Positive | Service requests queried and SR opened | Important fields are complete | Analysis concluded successfully | | | |
| Analyse the Service Request | 6 | Negative | Service requests queried and SR opened | Important fields missing | Throw an exception | | | |
| Harvest information from previous Migration Order | 7 | Positive | Service Request analysed | Migration Order found | Harvest the previous/deleted price plan successfully | | | |
| Harvest information from previous Migration Order | 8 | Negative | Service Request analysed | Migration Order not found | Throw an exception | | | |
| Generate the Migration Reversal Quote | 9 | Positive | Info harvested from previous Migration Order | Important field/s are complete | Migration Reversal Quote generated successfully | | | |
| Generate the Migration Reversal Quote | 10 | Negative | Info harvested from previous Migration Order | Important field/s are missing | Throw an exception | | | |
| Waiver the migration fee | 11 | Positive | Migration Quote generated | Migration fee amount covered | Migration fee waived successfully | | | |
| Waiver the migration fee | 12 | Negative | Migration Quote generated | Migration fee amount not covered | Throw an exception | | | |
| Process the Migration Quote | 13 | Positive | Migration fee waived | Disconnection Reason found Media Code found Due Date selected Credit Vetting approved | Migration Quote processed successfully | | | |
| Process the Migration Quote | 14 | Negative | Migration fee waived | Disconnection Reason not found Media Code not found Cannot select the Due Date Credit Vetting not approved | Throw an exception | | | |
| Submit the Migration Order | 15 | Positive | Migration Quote processed | Migration Order submit button available | Migration Order submitted successfully | | | |
| Submit the Migration Order | 16 | Negative | Migration Quote processed | Migration Order submit button greyed-out | Throw an exception | | | |
| Provide Customer Feedback | 17 | Positive | Migration Order submitted | Recipient Email contact found Recipient Contact number found | Customer feedback sent successfully | | | |
| Provide Customer Feedback | 18 | Negative | Migration Order submitted | Recipient Email contact not found Recipient Contact number not found | Throw an exception | | | |
| Close the Service Request | 19 | Positive | Customer provided with feedback | Service request accepted Resolution updated Status changed to Complete Cust. Approval To Close ticked Status updated to Closed | Service request closed successfully | | | |
| Close the Service Request | 20 | Negative | Customer provided with feedback | Service request not accepted Resolution not updated Status not changed to Complete | Throw an exception | | | |

| Test Component | TC # | Test Type | Pre-Condition | Scenario Description | Expected Result | Test Status | Actual Results | Comments |
|------------------------------|------|-----------|-----------------|---|--|-------------|----------------|----------|
| | | | | Cust. Approval To Close not ticked Status not updated to Closed | | | | |
| Re-route the Service Request | 21 | Positive | Process failure | Activities portal available New activity created Type field drop-down list available To be Reassigned option available | Service request re-routed successfully | | | |
| Re-route the Service Request | 22 | Negative | Process failure | Activities portal not available New activity not created Type field drop-down list not available To be Reassigned option not available | Throw an exception | | | |

Business Sign Off (Testing)

Post Implementation Review (PIR)