Author: Sitaram Gautam
Date: 04/07/2020

Change log

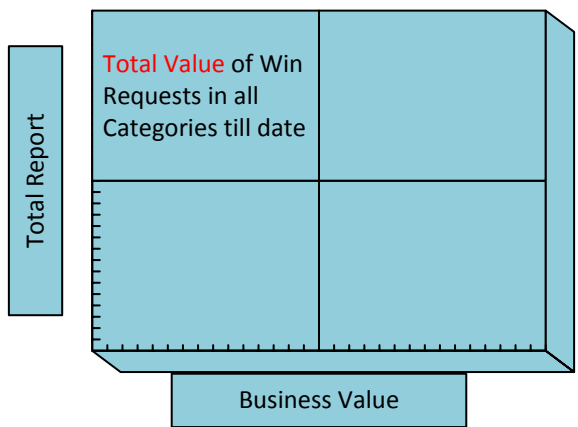| 1.0 | 04/07/2020 | Sitaram Gautam | .Created initial diagram flows |
| 1.1 | 08/07/2020 | Sitaram Gautam | Added keywords to new request |

Dashboard

- **Dashboard**
- Customer Requests
- Assigned Customer

Dashboard

Total Report

Total No. Of requests put in Not Interested Till date	Total No. Of requests Put in Follow-up Till date
Total No. Of customer records moved to Not in use in all Cat. Till date	Total No. of customer records put into DND till date

Executive Actions

Total Report

Total Number of new requests created by executive till date	Total Number of requests moved from Follow-up to Completed Status
Total Number of Service requests handled so far till date	

Executive Actions

Total Report

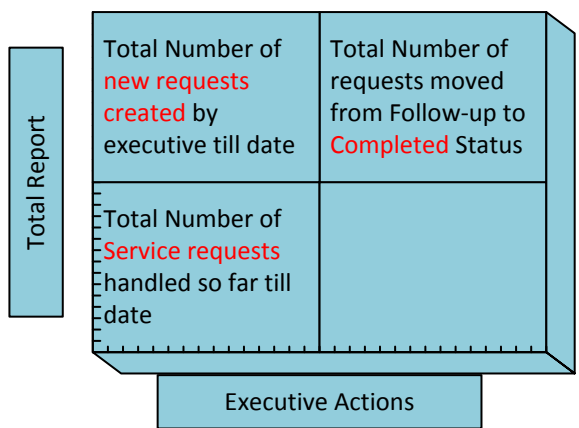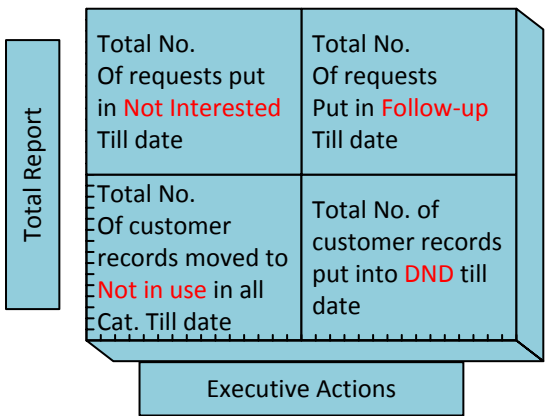|	
Total Value of Win Requests in all Categories till date	

Business Value

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LegendCall

Dashboard

Customer Requests

Assigned customer

Customer Requests

| Total New Requests | 🟢 | 65 |

Search

| New Requests | Follow-up Requests | Requests Approval Status | Completed Requests |

Request No.	First Name	Last Name	Mobile No. & Client details	Category	Sub-Category	Keyword	State	District	Comments	Action
250620-00001	Ankit	Kumar	95671xxxxx	Loan	Personal Loan	BT-PL	Bihar	Purnia	📄	Not Interested or Follow-up Or Completed

The format would be DDMMYY00001 and it would be for 24 hours only which should change next day after 12 AM

Only first 5 digits of mobile no will be visible and once any user click on it – new pop-up will open which contains complete Mobile No., yearly income, profession and email ID detail of the user

Maximum 1000 words in total

When executive move request from follow-up status to completed a pop-up should appear which confirm the user details plus asks to add business value to this request getting closed. In this case, 2,00,000. Business value is mandatory

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Follow-up Requests

Request No.	First Name	Last Name	Mobile No. & Client details	Category	Sub-Category	Keyword	State	District	Comments	Action
250620-00001	Ankit	Kumar	95671xxxxx	Loan	Personal Loan	BT-PL	Bihar	Purnia	📄	Not Interested Or Follow-up Or Completed

Requests Approval Status

Request No.	Executive Name	Username	Mobile No. & Client details	Category	Sub-Category	Keyword	State	District	Comments	Business Value	Action
250620-00001	Ankit	9876567899	📄	Loan	Personal Loan	BT-PL	Bihar	Purnia	📄	2,00,000	Request Re ! Pending A

Completed requests tab

Request No.	Executive Name	Username	Mobile No. & client details	Category	Sub-Category	Keyword	State	District	Comments	Business Value
250620-00001	Ankit	9876567899	📄	Loan	Personal Loan	BT-PL	Bihar	Purnia	📄	2,00,000

Dashboard

Customer Requests

Assigned Customer

Customer Contacts

Flag	First Name	Last Name	Mobile Number	Yearly Income In Lakhs	Email ID	Profession	State	District	Action	Comments
🚩	Amit	Kumar	95671XXXXX	1,60,XXX	xxx@gmail.com	Business	Bihar	Purnia	Create Ticket ! DND ! Not in Use	

Mobile number, Yearly income and Email id will be grayed out and only when you click on one of them- complete customer detail will open up in a Pop-up and full details will appear there

Vendor Executive will be able to perform these 3 tasks on any customer record assign to him/her by Manager

100 words limit

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