

## Helpdesk: MPR SOP

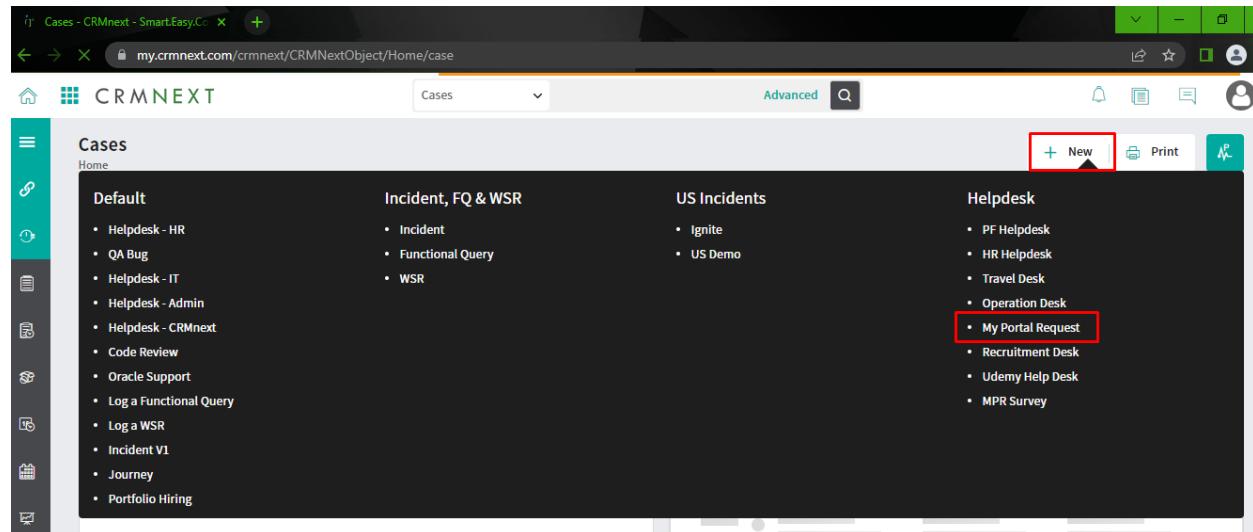
### **About MPR:**

MPR (My Portal Request) is a component of case object to raise the request or complaint to support (BTG) team. Normally MPR is used to log a case for internal issues. Normally MPR will be entertained from Monday to Friday between **09:00 AM to 06:00 PM** except for any public or government holidays

### **MPR Parameters:**

1. **Mode of Communication:** A user can only raise the MPR from Case object on [my.crmnext](#) portal. Once the MPR is logged, a unique case id is generated, and case owner will be communicated with auto response. No Other mode (Chat, Call, Email, Signal etc.) will be entertained for any request or concern.

**Note:** We do not accept any request or concern without Case Id.



2. **Category:** Following category are envisaged to be logged MPR at the helpdesk. **It's a mandatory field.**

S.No	Category	Description
1	User Creation	Request related to user creation on My Portal
2	Configuration	Related to any configuration or request except user creation

Category				X
Search By	Category	Search		
Category	Category	Case Category	Tag	
Configuration	My Portal Request	MY Portal Request	Not Specified	
User Creation	My Portal Request	MY Portal Request	Not Specified	

3. **Case Source:** Case source define the case owner is a customer or employee (within the organization).

S.No	Case Source	Description
1	Customer	Case owner is a customer
2	Internal	Case owner is within the organization

Case Source

▼

Customer  
Internal

4. **Case Type:** The case logged under MPR is classified under one of the following case types.

S.No	Case Type	Description
1	Incident	MPR related to existing functionality
2	CR	MPR related to change any existing functionality
3	Pending at Product	MPR dependent on product team

#### Case Type

A screenshot of a dropdown menu titled "Case Type". The menu has a blue header bar. Below it, the options "Incident", "CR", and "Pending At Product" are listed. The "Pending At Product" option is highlighted with a blue background.

5. **Status Code:** Case Status is classified with different status codes which shows the current status of the case.

S. No	Status Codes	Description
1	New	New Case
2	Awaiting Input	Need some more Input From the case owner
3	Input Sent	Input Sent by the case owner
4	Work – In Progress	Case is In Progress
5	Requirement Raised	Requirement raised to product Team regarding the case
6	Resolved	Resolved
7	Pending at Product	Pending on Product Team
8	In SQL Development	Under SQL development

#### Status Code

A screenshot of a dropdown menu titled "Status Code". The menu has a blue header bar. Below it, the options "New", "On Hold", "Re Opened", "Awaiting Input", "Invalid", "Works For Me", "Work - In Progress", "Input Sent", "Closed -Customer Confirmed", "Invalid -Customer Confirmed", "Requirement Raised", "Resolved", "Pending At Product", and "In SQL Development" are listed. The "New" option is highlighted with a blue background.

6. **Development Required**: This field shows case dependency on Development Team.

S.No	Development Required	Description
1	Yes	If Development Required on Case
2	No	If Development not Required

Development Required

Development Required

Yes

No

7. **Scope**: Scope defines the case understanding.

S. No	Scope	Description
1	Clear	If case is clear to proceed
2	Not Clear	If case is not clear and need more understanding

Scope

Scope

Clear

Not Clear

## **How to Raise MPR:**

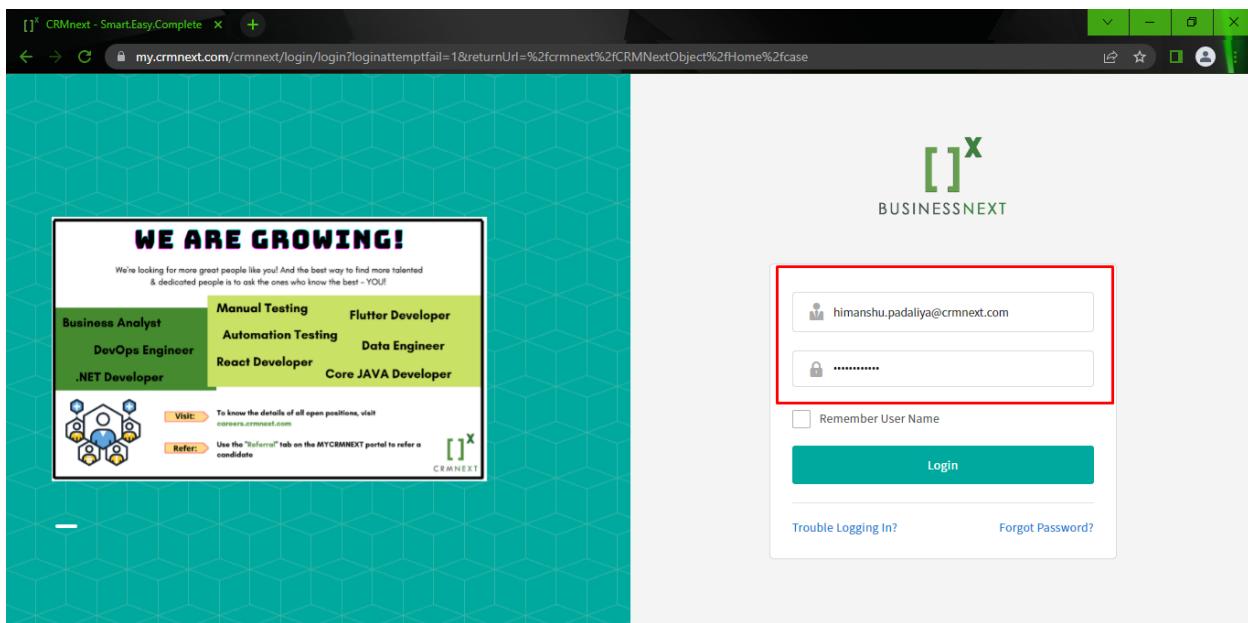
MPR is used to report any internal or external issue or request regarding the product. You can raise the MPR from the MY portal.

Follow the below steps to raise MPR on My portal.

**Note: Please don't raise MPR with administrator role as the layout shows many unnecessary fields and option from admin role.**

1. Log in to My portal with your credentials.

<https://my.crmnext.com/crmnext/login/login?loginattemptfail=1&returnUrl=%2fcrmnext%2fCRMNextObject%2fHome%2fcase>

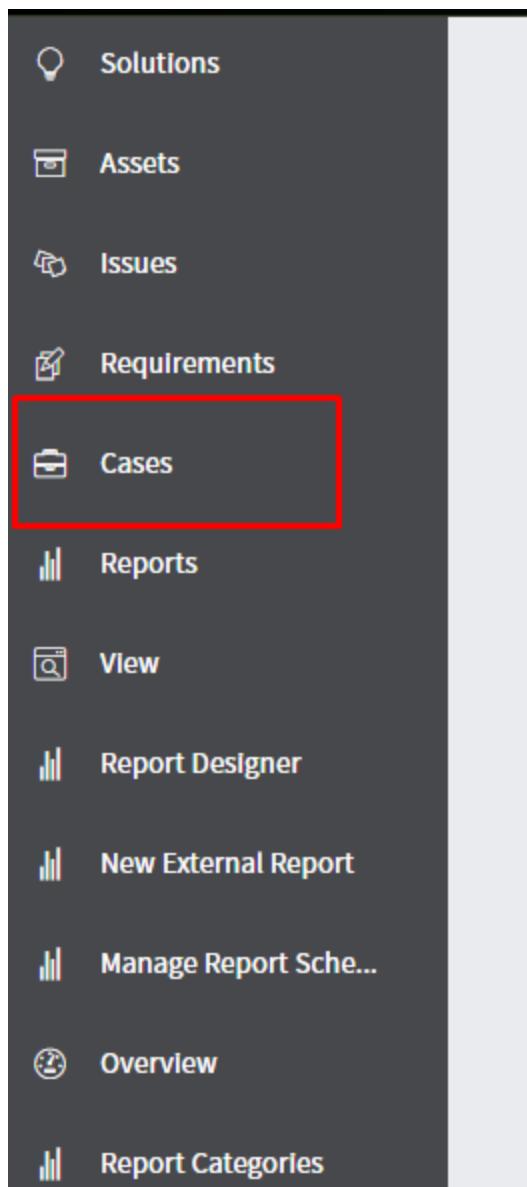


2. Once you click on Login, you will redirect to My Portal Home page.

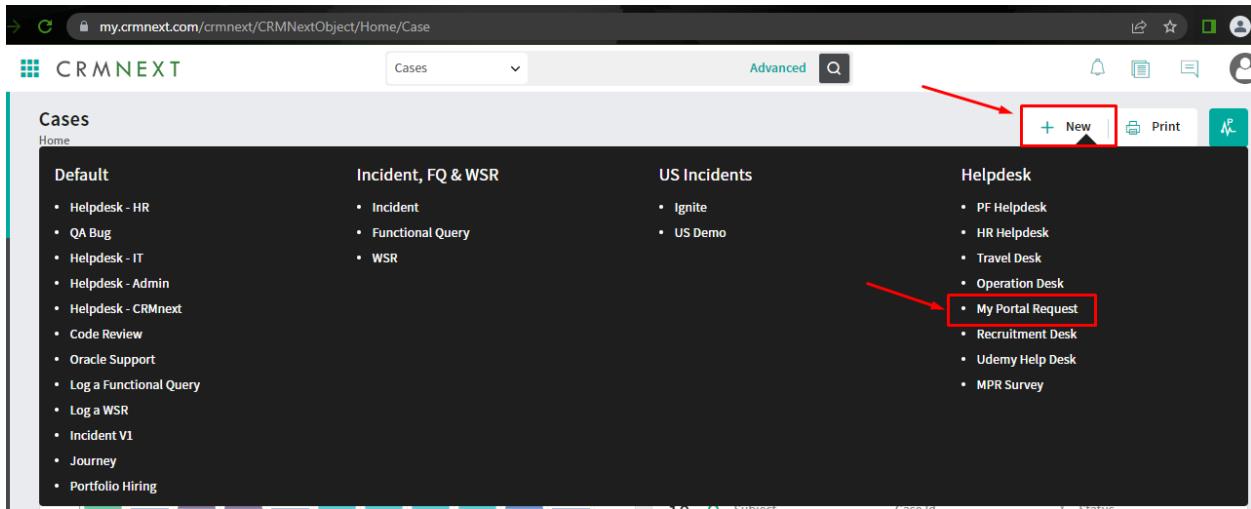
The screenshot shows the CRMNext Summary page. On the left, there is a vertical navigation bar with icons for Home, Recent Items, Summary, Tasks, Project, Appointments, Calendar, Training, Approval, and FeedBack. The main content area has two sections: 'Activities' and 'Insight'. The 'Activities' section shows a date range from 'Today' to 'Aug 11, 2022' and '7 Days' to 'Month'. It displays a placeholder icon of a person looking at a document and the message 'No data exists.' Below it says 'There is no available data to show, please choose another option and try again.' The 'Insight' section also shows a placeholder icon of a person looking at a document and the message 'No Record Found'. Below it says 'There is no available data to show, please choose another option and try again.' There are buttons for 'Customize Home Page' and 'Home Page Designer' at the top right.

3. you can raise MPR from the case object. Click on 3- Horizontal Lines on left panel and select the case object.

This screenshot shows the same CRMNext Summary page as above, but with the 'Recent Items' section expanded in the left sidebar. A red arrow points to the three horizontal lines icon in the sidebar, indicating where to click to expand the menu. The rest of the interface is identical to the first screenshot, showing the 'Activities' and 'Insight' panels with their respective placeholder icons and messages.



4. Click on “+New” and then “My Portal request” below helpdesk category.



5. Once you click on “My Portal Request”, system will open a form. you need to fill this with required details and click on save.

**Note:** Fields with red line are mandatory.

My Portal Request  
Home > New

KEY INFORMATION

Category	Status Code
<input type="text"/>	<input type="text"/> New
Subject	<input type="text"/>
Details	<input type="text"/>

4000 character(s) remaining.

Response

Please post your comments here

Save Cancel

6. Once you click on save, Case (MPR) ID is generated, and it will be assigned to the support (BTG) team. You are notified with auto- responses regarding your case.

## **MPR Reports:**

- **Report Summary**

We use **MPR - Case Tracking** report to track MPR. We can track Open/Close, status, Assignee and case ageing through this report.

**Report Category:** Saksham KPI

**Report Name:** MPR - Case Tracking

The screenshot shows the CRMNext interface with the following details:

- Header:** Reports - CRMnext - Smart.Easy / my.crmnext.com/crmnext/CRMNextObject/Home/report
- Left Sidebar:** Navigation icons for Home, Reports, Leads, Opportunities, Accounts, Contacts, Cases, Tasks, Calendars, Notes, and Email.
- Top Bar:** CRM NEXT logo, search bar, and dropdown for "Select Object".
- Section:** Reports (Home) - Not Specified
- Table:** A list of reports with columns for Name, Description, and various metadata (Created on, Last modified, etc.).
  - Saksham Reports - ( 2 )**
    - Saksham KPI - ( 8 )** (highlighted with a red box)
  - CSAT MPR Report
  - MPR Case Tracking - Matrix
  - MPR - CR/Incident Report
  - MPR Case Tracking - Matrix
  - MPR - Case Tracking (Drill Report)
  - MPR - Cases (Past 6 Months)
  - MPR - Case Tracking** (highlighted with a red box)
  - Case tracking - MPR
- Right Panel:** A vertical list of report categories: Tren, MPR, Offer, MY P, Open, Test, Deliv, FY w, Case, All P, Payn, and MY P.

- **Report View and Filters:**

1. Once you click on the report, The report will open with pre-defined filter (MYP\_Case = Open & Layout Id = My Portal Request) data
2. You can other filters also to get data according to the requirement.

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### Filters

Assigned To	Operator	▼
Created On	Operator	▼
Owner	Operator	▼
Category	Operator	▼
Open/Close	Equal	▼
	Open	 
Source	Operator	▼
Type	Operator	▼
Resolved On	Operator	▼
User Location	Operator	▼

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Apply Clear

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- **Report URL:**

You can directly access the report from below URL:

<https://my.crmnext.com/crmnext/Report/GetReportDetailControl?x=3nc2ksnk2m6ggtn gw4jg28vhlaufdhlcw5yzeta&winpop=1>

### **MPR Category and Assignment (Flow Chart):**

