1. Introduction

This manual explains how a Coordinator should use the Dettol Swasth Bharat Champ CRM system.

This system can be used both on Desktop and Mobile.

2. Login & Dashboard

2.1 Login Screen

1. Enter your **registered 10-digit mobile number** and click **Send OTP**.

2. An **OTP** will be sent to your mobile number.

3. Enter the **6-digit OTP** to verify and log in.

4. You will be taken to the **Dashboard**.

3. Dashboard Overview

The Dashboard provides quick access to important program metrics.

3.1 Quick Reports

At the top of the screen, you will see:

- Number of **Schools Assigned**

- Number of **Students Registered** for participation in the program.

- Number of **Students** enrolled on the app.

- Number of students with **Milestone Reward Verifications Pending**

3.2 Rewards Pipeline Graph

This will show you a graphical view of reward delivery status that shows the number of:

- **In Route Delivery**

- **Rejected Delivery**

- **Delayed Delivery**

- **Delivered Delivery**

- **Shipped Delivery**

Using the drop down you can view the graph for:

- Today

- Last 7 Days

- Month Till Date

- Custom Date Range

3.3 Verifications Done

This graph shows the number of students with milestone verifications completed. You can use the drop down to view graph from:

- Today

- Last 7 Days

- Month Till Date

- Custom Date Range

3.4 School Wise Milestones Achieved

You can select a milestone from the dropdown to view:

- School Name

- Total Students who achieved the milestone

- Male Students who achieved the milestone

- Female Students who achieved the milestone

Click **View All** to open the full table.

3.5 School Wise Active Students

This section shows:

- School Name

- Total Students Registered for participation in the program.

- Total Students Enrolled on the App

- Active Students (Students who have logged on to the application for the time duration selected)

Use the dropdown to view for different time range such as:

- Today

- Last 7 Days

- Month Till Date

- Custom Date Range

Click **View All** to open the full table.

4. Milestones Completion

4.1 Overview Table

You will see a table containing:

- Student Name

- School Name of student

- Student Address

- Milestone Achieved

- Status

Click **Take Action** to view and modify milestone status.

5. Milestone Delivery Workflow

This section contains the complete list of:

- Student name

- School name

- Home address

- Milestone achieved

- Delivery status

- Action options

5.1 Milestone Status Types

- **Delivered**

- **Shipped**

- **In Route**

- **Rejected**

- **Delayed**

Default Status: When a student claims the milestone, the status automatically becomes **Shipped**.

6. Taking an Action on a Milestone

For each student, the Action section includes three buttons:

1. **View Milestone**

2. **In Route**

3. **Reject Milestone**

6.1 Marking Milestone as In Route

Click **In Route** to mark the milestone delivery as *in route* and initiate the delivery process.

6.2 Verifying at Student's Home

When you reach the student's home:

1. Click **View Milestone**.

2. A screen will show:

   o Student name

   o Parent mobile number

   o Address

   o List of tasks submitted by the student

   o Swasth coin balance

3. For each task, choose **Approve** or **Reject** based on verification protocol.

6.3 Delivery OTP Submission

Once all tasks are verified:

- The **Enter Delivery OTP** option will appear.

- The student will provide the OTP.

- Enter the OTP and submit.

- Tasks will be marked successfully.

- Deliver the milestone reward.

- Rate the process.

Status will now change to Delivered.

7. Rejection Flow

If a task **does not meet criteria**:

- Mark the task as **Rejected**.
- A confirmation prompt will appear—confirm the rejection.

If, after verification, the **OTP section does NOT appear**, the student is **not eligible** for the reward.

Then:

1. Go back to the milestone list.
2. Use **Reject Milestone** in the Action column.
3. Status will change to **Rejected**.
4. The coin balance will reflect only for approved tasks.

8. Filters and Search Options

At the top of the milestone list, there are:

- **Dropdown 1:** Filter by milestone
- **Dropdown 2:** Filter by status
- **Search Bar:** Enter the student's *Dettol Swasth Bharat Champ Loyalty Card Number* to search

9. Reports Section

The Reports section contains two subsections:

9.1 Milestones Achieved

Displays the full **School Wise Milestones Achieved** report.

9.2 Active Students

Displays the full **School Wise Active Students** report.

10. Ticket Section

The Ticket system allows the coordinator to raise and respond to queries.

10.1 Raising a Ticket

1. Click on the **Ticket** section.

2. Click **Raise a Ticket**.

3. Choose a **Subject of Concern**.

   - Issue related to address
   - Need senior support.
   - Reward Stock
   - Others

4. Write a **Message**.

5. Submit the ticket.

10.2 Viewing and Responding to Tickets

After submitting, you will see:

- Ticket ID

- Subject

- Request Date & Time

- Ticket Status

- Action button

Click the **Action** button to reply to the ticket.

11. Instruction Manual

Click here to read the Instruction Manual.

12.Log Out

Use the Log Out button at the top right of the screen to log out of the CRM anytime.