



OGUN STATE WATER CORPORATION (OGSWC)

USER MANUAL

FOR

***CUSTOMER CARE RELATIONSHIP MANAGEMENT
SYSTEM***

BY
TRACECORP SOLUTIONS



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Contents

| | |
|---------------------------------|-----------|
| 1. LOGGING INTO TraceCRM | 3 |
| LOGGING INTO THE SYSTEM | 3 |
| 2. SYSTEM ADMINISTRATION | 4 |
| 2.1 CREATE USERS | 5 |
| 2.2 VIEW USERS | 6 |
| 3. SETTINGS | 8 |
| 3.1 COMPLAINTS CATEGORY | 9 |
| 3.2 COMPLAINTS DETAILS | 11 |
| 3.3 USER DEPARTMENT | 14 |
| 3.4 Department Sections | 18 |
| 4. REPORTS | 22 |
| 4.1 REPORTS | 22 |
| 4.2 Complaints Report | 22 |
| 4.3 Activity Report | 24 |
| 5. CUSTOMER CARE | 26 |
| 5.1 REGISTER A COMPLAINT | 26 |
| 5.2 VIEW COMPLAINTS | 29 |

INTRODUCTION

TraceCRM is a Customer relationship Management system that has been developed for Ogun State Water Corporation (OGSWC), to capture all customer complaints and follow the trail until the complaint is finally resolved. Another unique module in this particular system is the creating of job cards which are generated from the different technical complaints. The system has the ability to generate reports which can later be analyzed by the staff for better customer complaints handling and decision making.

1. LOGGING INTO TraceCRM

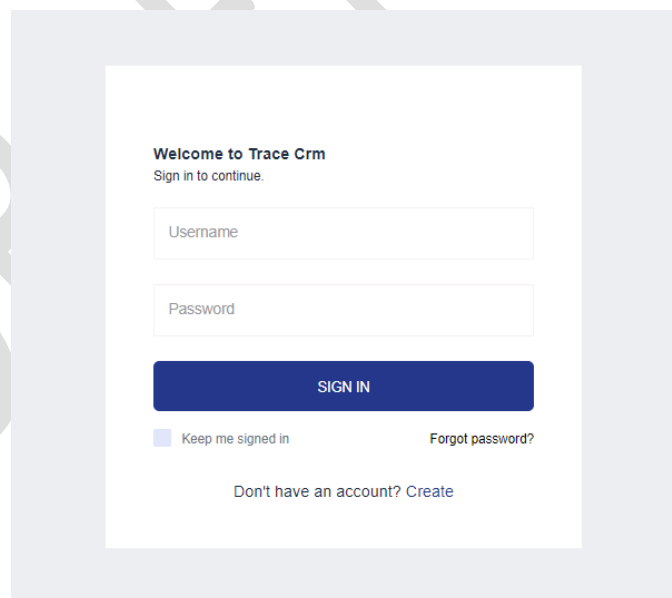
The Customer Care Relationship Management system is web based, and it is accessed through a web browser. (Google Chrome, Mozilla Firefox, Opera Mini, Microsoft Edge)

It will be accessed through an IP on a shared network: <http://3.22.191.7:8060/>

LOGGING INTO THE SYSTEM

The system administrator will have to login into the system using a unique “*username*” and “*password*”.

NB: Password sharing is unethical

A screenshot of the Trace CRM login interface. The page has a white background with a light gray border. At the top, it says "Welcome to Trace Crm" in bold, followed by "Sign in to continue." Below this are two input fields: "Username" and "Password". A blue "SIGN IN" button is positioned below the password field. Under the button, there is a checkbox labeled "Keep me signed in" and a link "Forgot password?". At the bottom, there is a link "Don't have an account? Create".

Welcome to Trace Crm
Sign in to continue.

Username

Password

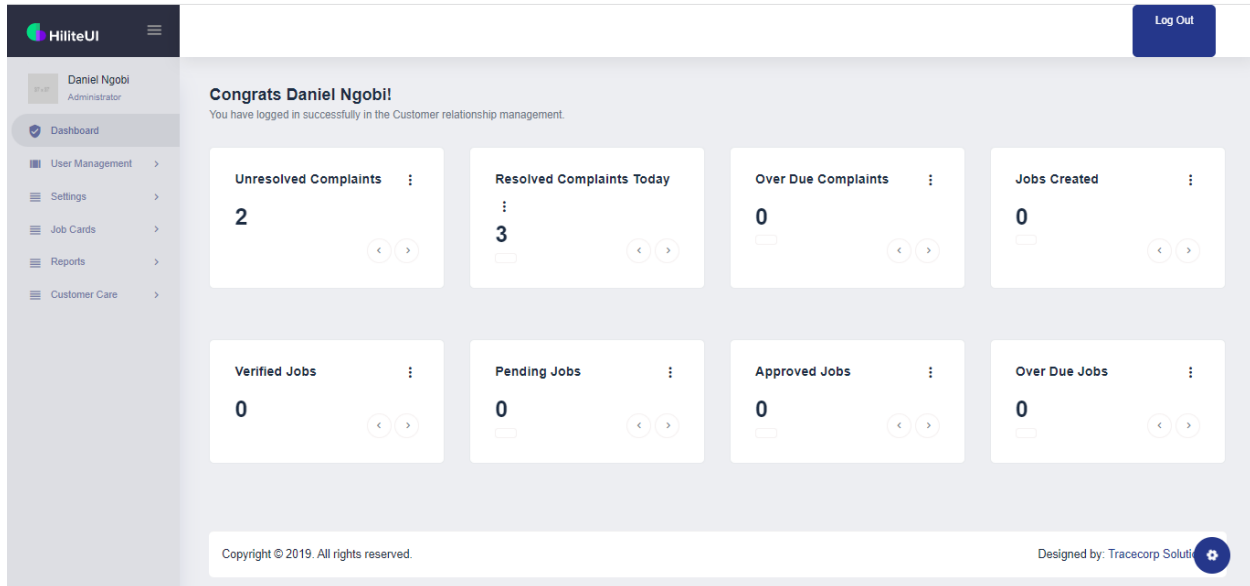
SIGN IN

☐ Keep me signed in [Forgot password?](#)

[Don't have an account? Create](#)

2. SYSTEM ADMINISTRATION

After the systems administrator logs in, he/she views the interface below.



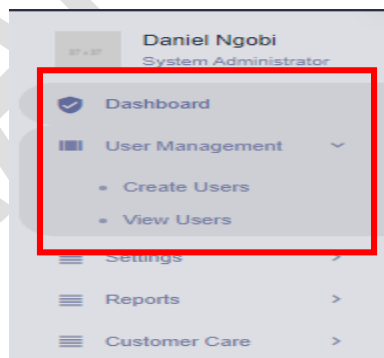
The Unique role for systems administrators is on the “User Management” and “Settings” modules as will be shown below.

The *User Management* Module helps an administrator to do several tasks including;



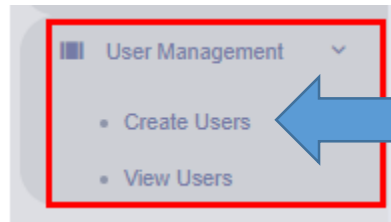
Create Users

View Users

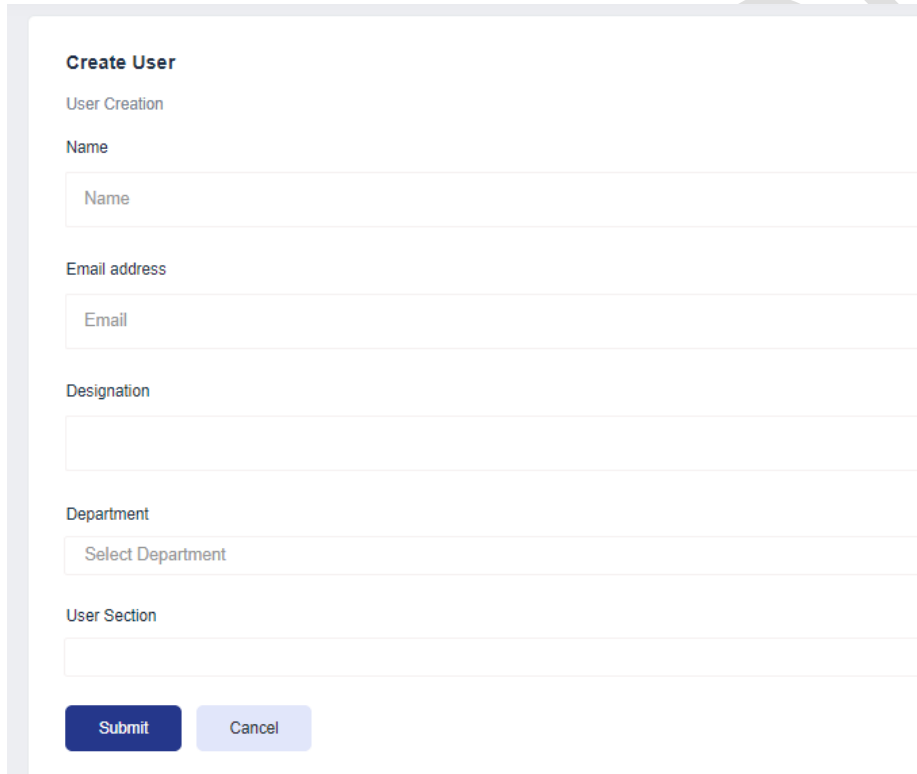


2.1 CREATE USERS

This enables the system administrator to add and provide log in rights for a new user to the system. The system administrator creates a new user by clicking on the “**Create Users**” link as shown below.



After clicking that link, a new window will open titled **Create User** as shown below.

A screenshot of the 'Create User' form. The form has a title 'Create User' and a subtitle 'User Creation'. It contains several input fields: 'Name', 'Email address', 'Designation', 'Department' (with a dropdown menu showing 'Select Department'), and 'User Section'. At the bottom of the form, there are two buttons: 'Submit' (in blue) and 'Cancel' (in light blue).

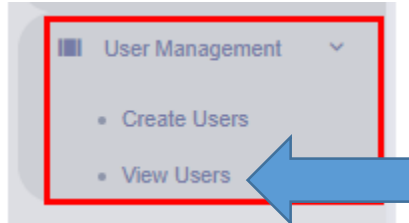
The systems administrator will then fill in all the new user’s details in the form and then click the “**Submit**” button to create and save the new user in the system.

After successfully creating a new user the system displays a success messages “**User details have been captured successfully and email sent to user with details**”

The newly created system user will receive an email with their credentials (username and password) that they will use to log into the system.

2.2 VIEW USERS

This enables the system administrator to view a list of all the system users created in the system. This is done by clicking on the “View Users” link.



After clicking that link, a new window will open displaying a list of all the users that have been created.

View Users

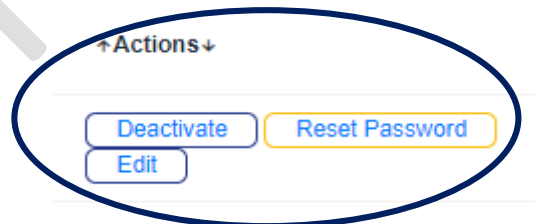
Show 1 entries

Search

| Full Name | User Department | User Email | User Name | Status | Actions |
|------------------|----------------------------|----------------------------|----------------------------|--------|--|
| Adenuga Adetunji | Administrator | tunjinuga@yahoo.co.uk | tunjinuga@yahoo.co.uk | True | Deactivate Edit Reset Password |
| Bongomin Henry | Quality Control Department | bongominhenry8@gmail.com | bongominhenry8@gmail.com | True | Deactivate Edit Reset Password |
| Daniel Ngobi | Administrator | ngobizadokchrist@gmail.com | ngobizadokchrist@gmail.com | True | Deactivate Edit Reset Password |
| Jeans Dave | Production Department | jeandave2552@gmail.com | jeandave2552@gmail.com | True | Deactivate Edit Reset Password |

It is on this particular page that the system administrator performs very crucial tasks as listed below

- ✚ Activate or De-activate existing users
- ✚ Edit existing user details
- ✚ Resetting system user's passwords



ACTIVATE OR DE-ACTIVATE EXISTING USERS

Once a user has been created in the system, he/she can only have access once he or she has been activated by the System Administrator.

A user is activated by clicking on the “Activate” button



Below is an example of an activated user account.

| | | | | | | |
|--------------|----------------------|----------------------------|----------------------------|------|--------------------|----------------|
| Daniel Ngobi | System Administrator | ngobizadokchrist@gmail.com | ngobizadokchrist@gmail.com | True | Deactivate Edit | Reset Password |
|--------------|----------------------|----------------------------|----------------------------|------|--------------------|----------------|

Below is an example of a deactivated user account.

| | | | | | | |
|-------------|----------------------|------------------------|------------------------|-------|------------------|----------------|
| David Omony | System Administrator | omony.david8@gmail.com | omony.david8@gmail.com | False | Activate Edit | Reset Password |
|-------------|----------------------|------------------------|------------------------|-------|------------------|----------------|

EDIT EXISTING USER DETAILS

The system Administrator can update details of an existing system user by clicking on the “Edit” button.



E.g.

| | | | | | | |
|------------------|---------------|-----------------------|-----------------------|------|--------------------|----------------|
| Adenuga Adetunji | Administrator | tunjinuga@yahoo.co.uk | tunjinuga@yahoo.co.uk | True | Deactivate Edit | Reset Password |
|------------------|---------------|-----------------------|-----------------------|------|--------------------|----------------|

On clicking the “Edit” button, the system administrator is redirected to a new page which contains a form prefilled with the user’s details. This is displayed below.

Edit User

Edit User Details

[Back](#)

Name

Adenuga Adetunji [T]

Email address

tunjinuga@yahoo.co.uk

Designation

test

Department

Administrator

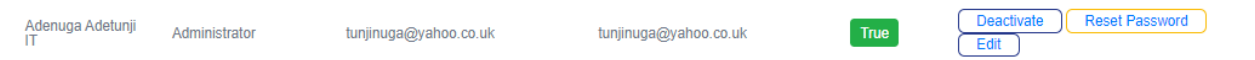
User Section

Section A

[Submit](#) [Cancel](#)

The System Administrator then updates these details accordingly and clicks of the “Submit” Button to save these details

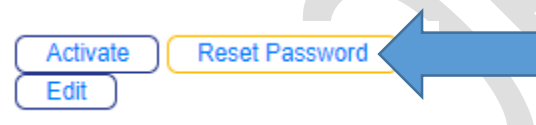
Upon clicking the button, a success message is displayed “**USER DETAILS UPDATED SUCCESSFULLY**”



As seen above, the user’s name was updated from *Adenuga Adetunji* to *Adenuga Adetunji IT*.

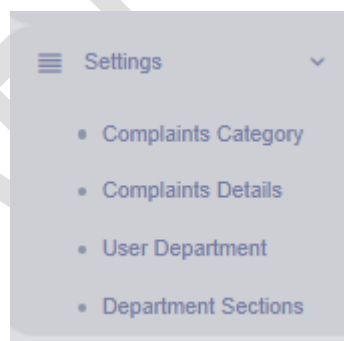
RESETTING AN EXISTING USER’S PASSWORD

This particular function is carried out by the System’s Administrator, and this can be performed in case a user fails to log into the system with the login credentials that have been sent to their personal emails by the system upon creation.



Once the admin clicks on the “Reset Password” button, the system automatically sends an email to the system user with new credentials to access the system

3. SETTINGS

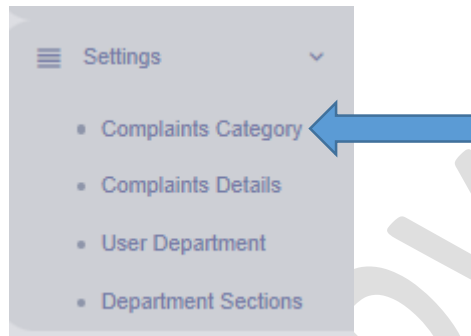


Under this particular module, The Systems Administrator is able to access the following sub-modules;

- Complaints Category
- Complaints Details
- User Department
- Department Sections

3.1 COMPLAINTS CATEGORY

Under this particular section, the administrator is able to **add** and **edit** any complaint categories in the TraceCRM.



On clicking the **Complaints Category** link, the page displayed is shown below.

A screenshot of the 'Complaints Categories' page. At the top, there is a red box highlighting the 'Add New Complaint Category' button. Below this, there is a search bar and a table with three columns: 'Complaint Category', 'Creation Date', and 'Actions'. The table contains three rows of data: 'Commercial', 'Other Category', and 'Technical'. Each row has an 'Edit' button in the 'Actions' column.

| Complaint Category | Creation Date | Actions |
|--------------------|----------------------|----------------------|
| Commercial | 1/3/2022 10:25:22 AM | Edit |
| Other Category | 1/4/2022 6:10:43 AM | Edit |
| Technical | 1/3/2022 10:25:41 AM | Edit |

To add a new complaint category, the administrator clicks on the “**Add New Complaint Category**” button. This is highlighted above.

On clicking the “**Add New Complaint Category**” button, the administrator is redirected to a new page as shown below.

A screenshot of the 'Complaint Category Details' form. The form has a 'Back' button at the top left. Below it, there is a section for 'Complaint Category info'. The 'Complaint Category' field is highlighted with a blue box and contains the text 'New Category'. There are 'Clear' and 'Submit' buttons at the bottom right of the form.

Complaint Category Details
[Back](#)
Complaint Category info
Complaint Category
[Clear](#) [Submit](#)

After filling in this particular form, the administrator then clicks on the “**submit**” button to add this particular Category.

After this, a success message “**COMPLAINT CATEGORY REGISTERED SUCCESSFULLY**” is displayed

In case the administrator attempts to submit an empty form, the system will prompt him/her to fill the missing fields as shown below.

Complaint Category Details

Complaint Category info

Complaint Category

|



Please fill out this field.

Clear

Submit

An example of a new created Complaint Category added to the system is shown below

| Complaint Category | Creation Date | Actions |
|--------------------|----------------------|----------------------|
| Commercial | 1/3/2022 10:25:22 AM | Edit |
| New Category | 2/8/2022 4:08:33 PM | Edit |

These particular Complaint Categories can be updated by clicking on the “Edit” button.

| Complaint Category | Creation Date | Actions |
|--------------------|----------------------|----------------------|
| Commercial | 1/3/2022 10:25:22 AM | Edit |
| New Category | 2/8/2022 4:08:33 PM | Edit |

E.g. the system administrator can edit the Complaint Category “New Category” to “Technical Category”

Complaint Category Details

[Back](#)

Complaint Category info

Complaint Category

Technical Category

Clear

Submit

On submitting these new details, the system will display a success message as shown below.

Complaint Category Details

[Back](#)

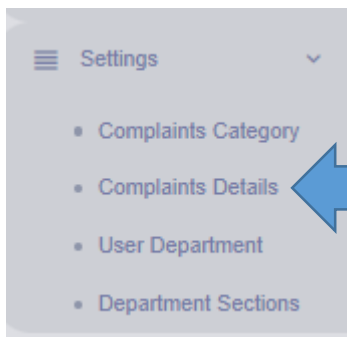
COMPLAINT CATEGORY UPDATED SUCCESSFULLY

And the system administrator can click the “Back” button to access the page that contains all the Complaint Categories.

As seen from the figure above, the particular Complaint Category has been edited successfully.

3.2 COMPLAINTS DETAILS

Under this particular section, the administrator is able to **add** and **edit** any complaint details in OGSWC.



On clicking the **Complaint Details** link, the page displayed is shown below.

A screenshot of the 'Complaints Details' page. At the top, there is a title 'Complaints Details' and a button 'Add New Complaint Details' which is highlighted with a red rectangular box. Below the button, there is a search bar and a table of complaint entries. The table has columns for 'Complaint Category', 'Complaint Details', 'Status', 'CreationDate', and 'Actions'. There are six rows of data. At the bottom, there is a pagination control showing 'Previous', '1', and 'Next'.

To add a new complaint details, the administrator clicks on the “**Add New Complaint Details**” button. This is highlighted above.

On clicking the “**Add New Complaint Details**” button, the administrator is redirected to a new page as shown below.

Complaint Category Details

Complaint Category info

Complaint Category

Technical

Complaint Sub Category

Faulty Meter

Clear

Submit

After filling in this particular form, the administrator clicks on the “**submit**” button to add this particular Sub Category.

After this, a success message “**COMPLAINT SUBCATEGORY RECORDED SUCCESSFULLY**” is displayed

In case the administrator attempts to submit an empty form, the system will prompt him/her to fill the missing fields as shown below.

Complaint Category Details

Complaint Category info

Complaint Category

Complaint Sub Category



Please select an item in the list.

Clear

Submit

An example of a new created Complaints' Detail added to the system is shown below

| Complaint Category | Complaint Details | Status | CreationDate | Actions |
|--------------------|-------------------------|--------|----------------------|----------------------|
| Commercial | Over Billing | ACTIVE | 1/3/2022 10:28:35 AM | Edit |
| Commercial | Un-reflected Payment | ACTIVE | 1/3/2022 10:29:28 AM | Edit |
| Commercial | Deactivation of account | ACTIVE | 2/7/2022 9:49:54 AM | Edit |
| Technical | Burst Pipes | ACTIVE | 1/3/2022 10:26:42 AM | Edit |
| Technical | Stolen Meters | ACTIVE | 1/3/2022 10:27:08 AM | Edit |
| Technical | Leakages | ACTIVE | 2/1/2022 9:25:57 AM | Edit |
| Technical | Faulty Meter | ACTIVE | 2/8/2022 6:04:28 PM | Edit |

Showing 1 to 7 of 7 entries

Previous 1 Next

These particular Complaints Detail can be updated by clicking on the “Edit” button

| Complaint Category | Complaint Details | Status | CreationDate | Actions |
|--------------------|-------------------------|--------|----------------------|----------------------|
| Commercial | Over Billing | ACTIVE | 1/3/2022 10:28:35 AM | Edit |
| Commercial | Un-reflected Payment | ACTIVE | 1/3/2022 10:29:28 AM | Edit |
| Commercial | Deactivation of account | ACTIVE | 2/7/2022 9:49:54 AM | Edit |
| Technical | Burst Pipes | ACTIVE | 1/3/2022 10:26:42 AM | Edit |
| Technical | Stolen Meters | ACTIVE | 1/3/2022 10:27:08 AM | Edit |
| Technical | Leakages | ACTIVE | 2/1/2022 9:25:57 AM | Edit |
| Technical | Faulty Meter | ACTIVE | 2/8/2022 6:04:28 PM | Edit |

Showing 1 to 7 of 7 entries

Previous 1 Next

E.g. the system administrator can edit the Complaints Detail “Faulty Meter” to “Buried Meter”

Complaint Sub Category Details

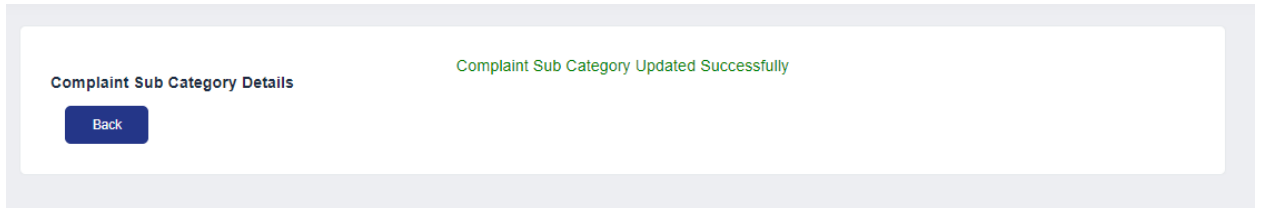
[Back](#)

Complaint Category info

Complaint Sub Category

[Clear](#)
[Submit](#)

On submitting these new details, the system will display a success message as shown below.



And the system administrator can click the “Back” button to access the page that contains all the Complaint Details.

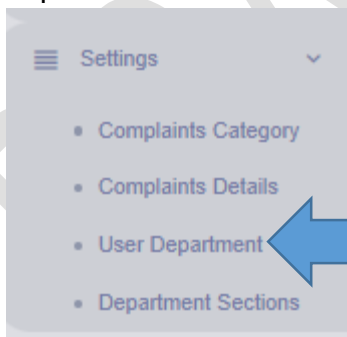
| Complaint Category | Complaint Details | Status | CreationDate | Actions |
|--------------------|-------------------------|--------|----------------------|----------------------|
| Commercial | Over Billing | ACTIVE | 1/3/2022 10:28:35 AM | Edit |
| Commercial | Un-reflected Payment | ACTIVE | 1/3/2022 10:29:28 AM | Edit |
| Commercial | Deactivation of account | ACTIVE | 2/7/2022 9:49:54 AM | Edit |
| Technical | Burst Pipes | ACTIVE | 1/3/2022 10:26:42 AM | Edit |
| Technical | Stolen Meters | ACTIVE | 1/3/2022 10:27:08 AM | Edit |
| Technical | Leakages | ACTIVE | 2/1/2022 9:25:57 AM | Edit |
| Technical | Buried Meter | ACTIVE | 2/8/2022 6:04:28 PM | Edit |

Showing 1 to 7 of 7 entries

As seen from the figure above, the particular Complaint Sub Category has been edited successfully.

3.3 USER DEPARTMENT

Under this particular section, the administrator is able to **add** and **edit** any user Departments in OGSWC.



On clicking the **User Department** link, the page displayed is shown below.

User Departments

Add User Department

Show 1 to 5 entries

Search

| Department Name | Department Email | Status | RecordDate | Recorded By | Actions |
|----------------------------|-------------------------------|--------|------------------------|----------------------------|---|
| Administrator | Administrator | Active | 12/31/2021 12:02:45 AM | | Deactivate Edit |
| Commercial | omony.david8@gmail.com | Active | 1/18/2022 9:40:34 AM | ngobizadokchrist@gmail.com | Deactivate Edit |
| Distribution Department | ngobidaniel04@gmail.com | Active | 1/5/2022 7:12:29 AM | ngobizadokchrist@gmail.com | Deactivate Edit |
| Production Department | omony.david8@gmail.com | Active | 1/3/2022 10:02:33 AM | ngobizadokchrist@gmail.com | Deactivate Edit |
| Quality Control Department | domony@tracecorpsolutions.com | Active | 1/3/2022 6:04:28 AM | ngobizadokchrist@gmail.com | Deactivate Edit |

Showing 1 to 5 of 5 entries

Previous 1 Next

To add a new User Department, the administrator clicks on the “Add New User Department” button. This is highlighted above.

On clicking the “Add New User Department” button, the administrator is redirected to a new page as shown below.

Complaint Category Details

Department Details

Department Name

Department Email

[Clear](#) [Submit](#)

After filling in this particular form, then the administrator clicks on the “submit” button to add this particular User Department.

After this, a success message “USER DEPARTMENT CREATED SUCCESSFULLY” is displayed

In case the administrator attempts to submit an empty form, the system will prompt him/her to fill the missing fields as shown below.

The screenshot shows a form titled "Complaint Category Details" with a sub-header "Department Details". It contains two input fields: "Department Name" and "Department Email". The "Department Name" field is empty and has a validation error message box above it that says "Please fill out this field." Below the fields are two buttons: "Clear" and "Submit".

An example of a created Complaints' Detail added to the system is shown below

User Departments

[Add User Department](#)

Show 10 entries

Search

| Department Name | Department Email | Status | RecordDate | Recorded By | Actions |
|-----------------|------------------|-------------|------------------------|----------------------------|---|
| Administrator | Administrator | Active | 12/31/2021 12:02:45 AM | | Deactivate Edit |
| Civil Works | kenji@gmail.com | DEACTIVATED | 2/8/2022 6:24:54 PM | ngobizadokchrist@gmail.com | Activate Edit |

As seen from the image above, a particular User Department has to be activated upon creation by clicking on the Activate button as shown below.

User Departments

[Add User Department](#)

Show 10 entries

Search

| Department Name | Department Email | Status | RecordDate | Recorded By | Actions |
|-----------------|------------------|-------------|------------------------|----------------------------|---|
| Administrator | Administrator | Active | 12/31/2021 12:02:45 AM | | Deactivate Edit |
| Civil Works | kenji@gmail.com | DEACTIVATED | 2/8/2022 6:24:54 PM | ngobizadokchrist@gmail.com | Activate Edit |

On clicking the “Activate” button the Status changes from “DEACTIVATED” to “Active”. This is also clearly shown by the change of color from red to green as shown in the image below.

User Departments

[Add User Department](#)

Show 10 entries

Search

| Department Name | Department Email | Status | RecordDate | Recorded By | Actions |
|-----------------|------------------|--------|------------------------|----------------------------|---|
| Administrator | Administrator | Active | 12/31/2021 12:02:45 AM | | Deactivate Edit |
| Civil Works | kenji@gmail.com | Active | 2/8/2022 6:24:54 PM | ngobizadokchrist@gmail.com | Deactivate Edit |

The System administrator can also deactivate a particular User Department by clicking on the “Deactivate” button.

These particular User Departments can be updated by clicking on the “Edit” button as shown below

User Departments

[Add User Department](#)

Show 10 entries

Search

| Department Name | Department Email | Status | RecordDate | Recorded By | Actions |
|-----------------|------------------|--------|------------------------|----------------------------|---|
| Administrator | Administrator | Active | 12/31/2021 12:02:45 AM | | Deactivate Edit |
| Civil Works | kenji@gmail.com | Active | 2/8/2022 6:24:54 PM | ngobizadokchrist@gmail.com | Deactivate Edit |

E.g. the system administrator can edit the User Department from “Civil Works” to “Department of Civil Works”. This is shown in the next window below.

User Department Details

[Back](#)

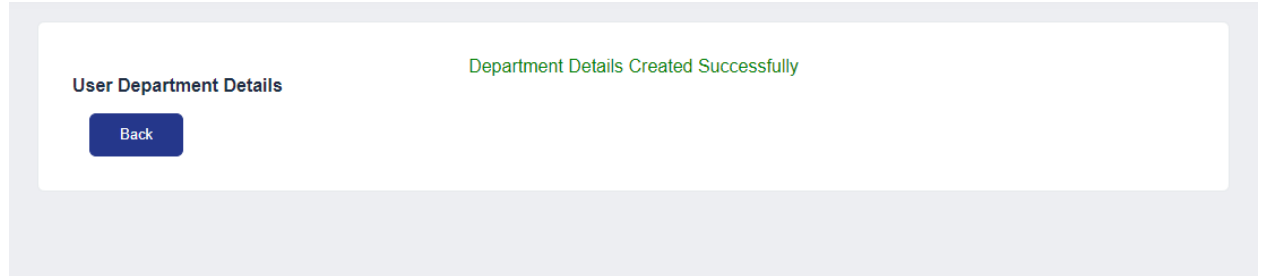
Department Details

Department Name

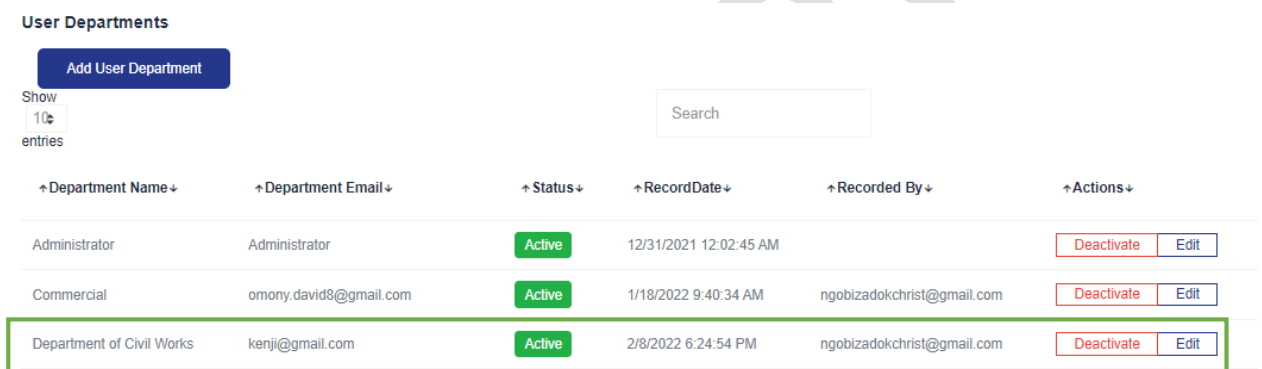
Department Email

[Clear](#) [Submit](#)

On submitting these new details, the system will display a success message as shown below.



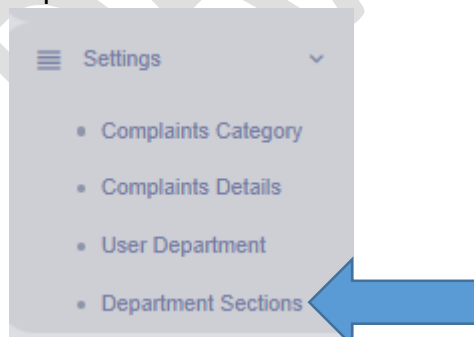
And the system administrator can click the “Back” button to access the page that contains all the User Departments.



As seen from the figure above, the particular User Department has been edited successfully.

3.4 Department Sections

Under this particular section, the administrator is able to **add** and **edit** any user Department Section in OGSWC.



On clicking the **Department Sections** link, the page displayed is shown below.

| User Sections | | | |
|---|----------------------------|-----------------------|----------------------|
| <div> <div>Add User Section</div> <div>Show 10 entries</div> <div>Search</div> </div> | | | |
| Section Name | Department Name | RecordDate | Actions |
| Billing | Commercial | 1/21/2022 5:11:16 AM | Edit |
| Customer Care | Commercial | 1/21/2022 5:12:07 AM | Edit |
| Quality | Quality Control Department | 2/4/2022 2:53:43 PM | Edit |
| Revenue | Commercial | 1/21/2022 5:14:06 AM | Edit |
| Revenue Collections | Commercial | 2/1/2022 9:29:57 AM | Edit |
| Section A | Quality Control Department | 1/20/2022 11:32:42 AM | Edit |
| Section BD | Quality Control Department | 1/20/2022 11:48:28 AM | Edit |
| test | Quality Control Department | 2/6/2022 1:52:12 PM | Edit |

To add a new Department Section, the administrator clicks on the “Add User Section” button. This is highlighted above.

On clicking the “Add User Section” button, the administrator is redirected to a new page as shown below.

User Department Section Creation

Section Details

Department Name

Please Select Department Name

Section Name

Clear

Submit

After filling in this particular form, then the administrator clicks on the “submit” button to add this particular User Department Section.

After this, a success message “SECTION CREATED SUCCESSFULLY “is displayed

In case the administrator attempts to submit an empty form, the system will prompt him/her to fill the missing fields as shown below.

User Department Section Creation

SECTION CREATED SUCCESSFULLY

Section Details

Department Name

Section Name

Please fill out this field.

An example of created Department section added to the system is shown below

User Sections

Show entries

| Section Name | Department Name | RecordDate | Actions |
|------------------|-----------------------|----------------------|-------------------------------------|
| Billing | Commercial | 1/21/2022 5:11:16 AM | <input type="button" value="Edit"/> |
| Chemical Section | Production Department | 2/8/2022 8:02:02 PM | <input type="button" value="Edit"/> |

These particular Department Sections can be updated by clicking on the “Edit” button as shown below

User Sections

Show entries

| Section Name | Department Name | RecordDate | Actions |
|------------------|-----------------------|----------------------|-------------------------------------|
| Billing | Commercial | 1/21/2022 5:11:16 AM | <input type="button" value="Edit"/> |
| Chemical Section | Production Department | 2/8/2022 8:02:02 PM | <input type="button" value="Edit"/> |

E.g. the system administrator can edit the Department Section from “Chemical Section” to “Chemicals”. This is shown in the next window below.

Edit User Section

Section Details

Section Name

Chemicals

Clear

Submit

On submitting these new details, the system will display a success message as shown below.

Edit User Section

Section Details

Section Name

Clear

Submit

SECTION UPDATED SUCCESSFULLY

And the system administrator can go back the Department Section to access the page that contains all the Department Sections to view the one that has been edited.

User Sections

Add User Section

Show
10
entries

Search

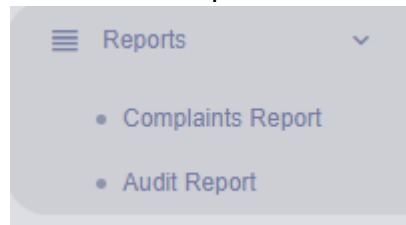
| Section Name | Department Name | RecordDate | Actions |
|--------------|-----------------------|----------------------|---------|
| Billing | Commercial | 1/21/2022 5:11:16 AM | Edit |
| Chemicals | Production Department | 2/8/2022 8:02:02 PM | Edit |

As seen from the figure above, the particular Department Section has been edited successfully.

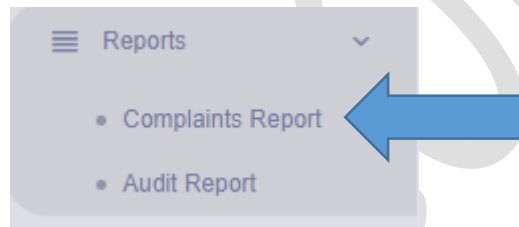
4. REPORTS

4.1 REPORTS

This is the module that contains all system generated reports. Only system users with the access levels will be able to view and extract these reports.



4.2 Complaints Report



This report contains all complaints that have been registered in the system. When a system user clicks the “*Complaints Report*”, the page below is displayed.

| Complaint Sub Category | Area | Branch | Status | Complaint Date | Actions |
|------------------------|----------|--------|-----------|----------------------|----------------------|
| Burst Pipes | | | RESOLVED | 1/3/2022 10:34:10 AM | View |
| Burst Pipes | | | PENDING | 1/4/2022 7:15:36 AM | View |
| Burst Pipes | | | RESOLVED | 1/12/2022 6:07:36 AM | View |
| Burst Pipes | | | RESOLVED | 1/13/2022 5:56:21 AM | View |
| Burst Pipes | | | PENDING | 1/15/2022 4:10:30 PM | View |
| Burst Pipes | | | ESCALATED | 1/15/2022 4:10:35 PM | View |
| Burst Pipes | | | PENDING | 1/15/2022 4:12:57 PM | View |
| Burst Pipes | | | PENDING | 1/16/2022 5:11:10 PM | View |
| Burst Pipes | Abeokuta | Elega | RESOLVED | 1/18/2022 5:31:57 AM | View |
| Burst Pipes | | | PENDING | 1/15/2022 4:15:19 PM | View |

Showing 1 to 10 of 20 entries

[Previous](#) [1](#) [2](#) [Next](#)

As Illustrated above, there is a “view” button at the extreme right. When this particular button is clicked, all details pertaining this complaint are displayed.

Complaint Resolution Details

Complaint info

GO BACK

| | |
|---------------------|--------------------------|
| Source Of Complaint | In Person |
| Complainant Name | Martha Lukabwe |
| Customer Email | omony.david8@gmail.com |
| Customer Phone | 0705895816 |
| Area | Abeokuta |
| Branch | Elega |
| Priority | High |
| Complaint Details | Burst infront of my home |

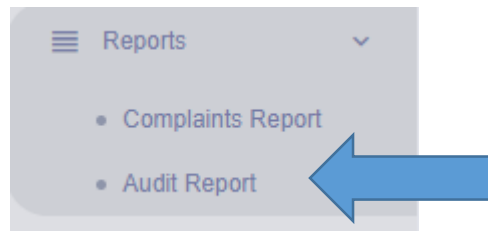
Audit Trail For Complaint Resolution

Complaint Id 20223118/AB/EL/14

| # | Status ▾ | EscalatedTo ▾ | ResolutionDetails ▾ | RecordedBy ▾ | Date Resolved ▾ |
|---|----------|---------------|---|--------------|----------------------|
| 5 | RESOLVED | N/A | Team has been sent on ground to fix issue | Daniel Ngobi | 1/18/2022 5:34:07 AM |

4.3 Activity Report

This particular report contains an activity log. All tasks performed by system users are logged for audit purposes.



When a system user clicks the “Activity Log Report”, the page below is displayed.

Data Table

Show
10
entries

| ↑ Record Id ↓ | ↑ Username ↓ | ↑ Activity ↓ | ↑ Record Date ↓ |
|------------------|----------------------------|---|-------------------------|
| 1 | Daniel | Quarried user details | 6/11/2020 7:25:32 PM |
| 2 | ngobizadokchrist@gmail.com | registered user with username : ngobizadokchrist@gmail.com and email : ngobizadokchrist@gmail.com | 6/11/2020 7:32:09 PM |
| 3 | Daniel | Quarried user details | 6/11/2020 7:32:13 PM |
| 4 | | Queried successfully user details | 6/11/2020 7:32:13 PM |
| 5 | Daniel | Quarried user details | 6/11/2020 7:34:53 PM |
| 6 | | Queried successfully user details | 6/11/2020 7:34:53 PM |
| 7 | daniel | Reset User Password for : ngobizadokchrist@gmail.com | 6/11/2020 7:36:00 PM |

4.4 JOB REPORT

This particular report contains all jobs that have been generated by TraceCRM.



The system user can access this report by clicking on the “Job report” link. On clicking this link, the system user is redirected to the page containing all jobs created by TraceCRM.

JobCards

Show 10 entries

Search

| Ticket Id | Job Type | Area | Branch | AssetCategory | Status | Creation Date | Actions |
|-------------------|------------------------------|------|--------|---------------|---------|---------------------|--|
| 20220401/AB/IB/18 | Static and Mobile Plant type | 1 | | Static | Pending | 2/4/2022 2:40:41 PM | View Download Jobcard |

Showing 1 to 1 of 1 entries

Previous 1 Next

Actions

[View](#)
[Download Jobcard](#)

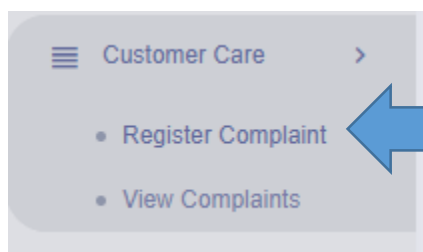
- ✚ When the system user clicks on the “view” button, the page that is displayed is the one that shows the complaint details and an audit trail of what has so far happened in trying to resolve this particular complaint.
- ✚ On clicking the “Download Jobcard”, the system user is able to download a copy of the Jobcard off TraceCRM

5. CUSTOMER CARE

5.1 REGISTER A COMPLAINT

This module will be accessed by the customer care personnel. When the customer care personnel clicks on the “customer care” module, a dropdown containing the sub-modules is displayed

- ✚ Register Complaint
- ✚ View Complaints



To register a new complaint, the user clicks on the “*Register Complaint*” link, a window containing a form to be filled by the customer care personnel is displayed as shown below.

Complaints can be made by both “*Registered*” (*These are OGSWC customers, already created in the billing system*) and “*Non registered*” (*These are individuals who are not registered in the system i.e., they are not customers of the utility customers*).

For Non registered customers, the Complainant Ref/Property Ref field will be hidden as opposed to the “Registered”, whose Complainant Ref/Property Ref is a mandatory. This is used by a customer care personnel to fetch all information pertaining this particular customer in the system on clicking the “Query Customer Details” button.

Complaint Details

Complaint info

Complainant Type

Registered

Complainant Ref/Property Ref

21314204

Query Customer Details

Complainant Name

Adebayo David

Area

Ogun

Branch

Ibara

Source Of Complaint

--Select--

Complaint Category

Select Category

Complaint Sub Category

Territory

Telephone

018272282899

Email Contact

Address

Priority

Complaint Details

After filling in this form, the customer care personnel clicks on the “submit” button to save these details. Also, the customer care personnel can click on the “Clear” button to clear all the content on this particular form (Once this button is clicked, all the content on this form is cleared).

All mandatory fields need to be filled in before submitting the form. In an instance that any of these fields are left blank or filled in wrongly, the system will prompt the customer care personnel to perform certain functions e.g. “Please fill out this field”

When the Customer Care personnel clicks the “submit” button, he/she is redirected to a page which prompts them to either resolve the complaint if they are able to, or escalate it to department.

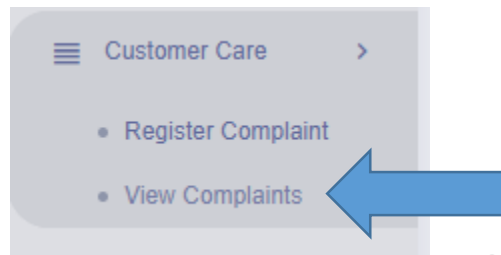
Resolve Or Escalate Ticket

COMPLAINT REGISTERED SUCCESSFULLY WITH ID 20221608/AB/IB/21

Escalate or Resolve Issue

5.2 VIEW COMPLAINTS

This is another sub module under the customer care module. The system users are able to view all complaints that are registered in the system as shown below;



When a system user clicks on the “view complaints” link, he/she is redirected to the page displayed below;

Complaints

Show 10 entries

Search

| Complaint Id | Source | Customer Name | Email Contact | Complaint Category | Complaint Sub Category | Status | Complaint Date | Actions |
|-------------------|------------|---------------------|----------------------------|--------------------|------------------------|-----------|----------------------|--|
| 20220401/AB/IB/18 | Phone Call | Omony David Adebayo | ngobidaniel04@gmail.com | Technical | Leakages | ESCALATED | 2/1/2022 10:04:47 AM | View Resolve Escalate Generate Job Card |
| 20220916/AB/AD/10 | Facebook | daniel test1 | ngobizadokchrist@gmail.com | Commercial | Over Billing | PENDING | 1/16/2022 5:09:21 PM | View Resolve Escalate |
| 20221116/AB/IJ/11 | Facebook | daniel test2 | ngobizadokchrist@gmail.com | Technical | Burst Pipes | PENDING | 1/16/2022 5:11:10 PM | View Resolve Escalate Generate Job Card |

From this particular page, a system user is able to perform multiple actions, these include;

- ✚ Viewing a registered complaint
- ✚ Resolving a registered complaint
- ✚ Escalating a registered complaint
- ✚ Generating a Job Card for Technical Complaints



VIEWING A REGISTERED COMPLAINT

A system user can view all information regarding a particular registered complaint by clicking on the “View” button under the ‘**Actions**’ column as illustrated below.

Complaints

Show 10 entries

Search

| Complaint Id | Source | Customer Name | Email Contact | Complaint Category | Complaint Sub Category | Status | Complaint Date | Actions |
|-------------------|------------|---------------------|----------------------------|--------------------|------------------------|-----------|----------------------|--|
| 20220401/AB/IB/18 | Phone Call | Omony David Adebayo | ngobidaniel04@gmail.com | Technical | Leakages | ESCALATED | 2/1/2022 10:04:47 AM | View Resolve Escalate Generate Job Card |
| 20220916/AB/AD/10 | Facebook | daniel test1 | ngobizadokchrist@gmail.com | Commercial | Over Billing | PENDING | 1/16/2022 5:09:21 PM | View Resolve Escalate |
| 20221116/AB/IJ/11 | Facebook | daniel test2 | ngobizadokchrist@gmail.com | Technical | Burst Pipes | PENDING | 1/16/2022 5:11:10 PM | View Resolve Escalate Generate Job Card |

On clicking the “view” button the system user is redirected to the page displayed below.

Complaint Resolution Details

Complaint info

[GO BACK](#)

| | |
|---------------------|---|
| Source Of Complaint | Phone Call |
| Complainant Name | Adebayo David |
| Customer Email | omony.david8@gmail.com |
| Customer Phone | 0705895816 |
| Area | Abeokuta |
| Branch | Ibara |
| Priority | High |
| Complaint Details | There is a leakage on the pipe besides my house |

Audit Trail For Complaint Resolution

Complaint Id 20221608/AB/IB/21

| # | Status ▾ | EscalatedTo ▾ | ResolutionDetails ▾ | RecordedBy ▾ | Date Resolved ▾ |
|---|----------|---------------|---------------------|--------------|-----------------|
|---|----------|---------------|---------------------|--------------|-----------------|

To return to the previous page, the system user clicks on the “GO BACK” button as highlighted above.

RESOLVING A REGISTERED COMPLAINT

A system user can resolve a particular registered complaint by clicking on the “*Resolve*” button under the ‘*Actions*’ column as illustrated below.

| | | | | | | | | |
|-------------------|------------|---------------|----------------------------|------------|--------------|----------|-------------------------|--|
| 20221515/AB/IB/9 | Facebook | daniel test | ngobidaniel04@gmail.com | Technical | Burst Pipes | PENDING | 1/15/2022 4:15:19 PM | View Resolve Escalate Generate Job Card |
| 20221608/AB/IB/21 | Phone Call | Adebayo David | omony.david8@gmail.com | Technical | Leakages | PENDING | 2/8/2022 10:16:39 PM | View Resolve Escalate Generate Job Card |
| 20222116/AB/OL/12 | Facebook | daniel test4 | ngobizadokchrist@gmail.com | Commercial | Over Billing | RESOLVED | 1/16/2022 5:21:21 PM | View |

This action can only be taken if the system user can resolve the complaint. On clicking the “*Resolve*” button, the window below is displayed.

Ticket Resolution Details

Ticket info

[GO BACK](#)

Source Of Complaint

Phone Call

Customer Email

omony.david8@gmail.com

Customer Phone

0705895816

Priority

High

Ticket Details

There is a leakage on the pipe besides my house

Resolution Details

A technical team that was near by the area was alerted and issue was resolved immediately

[Clear](#)

[Submit](#)

The system user has to provide details pertaining the resolution of this particular complaint. These details are captured under the “*Resolution Details*” text area as illustrated above.

After capturing these details, the system user clicks on the “*Submit*” button to save these details.

On successful submission of these details, the system user is redirected to the page of viewing customer complaints. The status of this particular complaint changes to “**RESOLVED**” as shown below.



ESCALATING A REGISTERED COMPLAINT

A registered complaint can be escalated to a higher authority if it cannot be resolved by a particular system user.

This can be done by clicking the “Escalate” Button as shown below



When this particular button is clicked, the system user is redirected to a new window as shown below;

The system user has to select the department and respective section to which this complaint is being escalated and also the reason it is being escalated.

All these fields are mandatory

Customer Complaint Assignment Form

[GO BACK](#)

Please assign this ticket to a department

Select Department

Select Department to assign to

User Section

Reason for assignment

[Submit](#)

[Cancel](#)

Upon submission, the system displays a success message “**TICKET SUCCESSFULLY ESCALATED AND EMAIL SENT TO THE HEAD OF DEPARTMENT**”

The system user can go to the previous page by clicking on the “GO BACK” button.

The status of this particular complaint changes to “ESCALATED” as shown below.

| | | | | | | | | |
|-------------------|------------|---------------------|-------------------------|-----------|----------|------------------|-------------------------|--|
| 20220401/AB/1B/18 | Phone Call | Omony David Adebayo | ngobidaniel04@gmail.com | Technical | Leakages | ESCALATED | 2/1/2022 10:04:47 AM | View Resolve Escalate Generate Job Card |
|-------------------|------------|---------------------|-------------------------|-----------|----------|------------------|-------------------------|--|

The system user with the rights can go further by clicking the “View” button to view more details pertaining this complaint

Complaint Resolution Details

Complaint info

[GO BACK](#)

Source Of Complaint

Phone Call

Complainant Name

Omony David Adebayo

Customer Email

ngobidaniel04@gmail.com

Customer Phone

09024562727

Area

Abeokuta

Branch

Ibara

Priority

High

Complaint Details

There is a major burst at one of your main Pipes

Audit Trail For Complaint Resolution

Complaint Id **20220401/AB/1B/18**

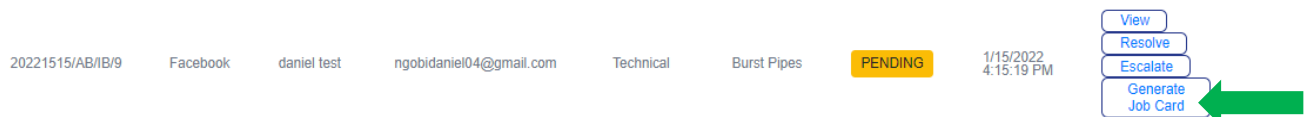
| # | Status ▾ | EscalatedTo ▾ | ResolutionDetails ▾ | RecordedBy ▾ | Date Resolved ▾ |
|----|-----------|---------------|--|----------------------------|----------------------|
| 10 | ESCALATED | 4 | investigate and identify source of leaks | ngobizadokchrist@gmail.com | 2/1/2022 10:19:33 AM |
| 11 | ESCALATED | 4 | Investigate and Identify source of the leakage | ngobizadokchrist@gmail.com | 2/1/2022 10:20:21 AM |
| 12 | ESCALATED | 4 | Investigate further and work on this issue as soon as possible | ngobizadokchrist@gmail.com | 2/1/2022 10:59:54 AM |
| 15 | ESCALATED | | | ngobizadokchrist@gmail.com | 2/6/2022 8:23:32 PM |

As shown above, for every action performed on a particular customer complaint, there is an Audit trail that generated.

A complaint can be escalated more than once until it has finally been fully resolved.

GENERATING A JOB CARD

For all technical complaints that have been registered by the Customer personnel, there is an option for generating a job card to enable this particular complaint be resolved. This is clearly shown below



On clicking the “Generate Job Card” button, the system user is prompted to select which job type to proceed with as shown below. He/she selects the Technical Field Job for this particular complaint

Job Details

Job Card info

Job Type

Technical Field Job

He/she then proceeds to provide details for this particular job. This is done by filling in the form with the details as displayed below.

Job Details

Job Card info

Job Type

Technical Field Job

Job Category

Leakage

Burst

Replacement

Maintainance

Area

Branch

Address

Y Coordinates

x coordinate

Block Map Ref

Refer to GIS

Materials required

Material Type

Size

Qty

Add Material

Materials purchased

Material Type

Size

Qty

Total Cost

Add Material

Clear

Submit

After successfully capturing the Job details, the system user then submits this job by clicking the submit button as displayed above. This particular job is then stored in the system under the View Jobs sub module.

Below are screens of other jobs that can be generated by TraceCRM

36 | Page

STATIC AND MOBILE PLANT

Job Details

Job Card info

Job Type

Static and Mobile Plant type

Area

Select Operational Are

Asset Category

Static

Mobile

Asset Location

Asset Type

Electrical

Mechanical

Asset Reference

Y Coordinates

x coordinate

Block Map Ref

Refer to GIS

Materials required

Material Type

Size

Qty

Add Material

Materials purchased

Material Type

Size

Qty

Total Cost

Add Material

Clear

Submit

ADMIN ASSET MANAGEMENT

Job Details

Job Card info

Job Type

Admin Asset Management

Area

Asset Category

Civil

Electrical

Carpentry

Electronic

Asset Location

Asset Reference

descriptionofworks

Y Coordinates

x coordinate

Block Map Ref

Refer to GIS

Materials required

Material Type

Size

Qty

Add Material

Materials purchased

Material Type

Size

Qty

Total Cost

Add Material

Clear

Submit

METER INSTALLATION

Job Details

Job Card info

Job Type

Meter Installation



Job Category

New Connection



Replacements(Defective)



Damaged



Flat Rate Ac Metering



Area

Branch

Territory

Sub Territory

Meter Type

Meter No

Reading

Y Coordinates

x coordinate

Customer Ref or Property

[Refer to GIS](#)

Materials required

Material Type

Size

Qty

Add Material

Materials purchased

Material Type

Size

Qty

Total Cost

Add Material

Clear

Submit

METER MAINTENANCE

Job Details

Job Card info

Job Type

Meter Installation



Job Category

New Connection



Replacements(Defective)



Damaged



Flat Rate Ac Metering



Area

Branch

Territory

Sub Territory

Meter Type

Meter No

Reading

Y Coordinates

x coordinate

Customer Ref or Property

[Refer to GIS](#)

Materials required

Material Type

Size

Qty

Add Material

Materials purchased

Material Type

Size

Qty

Total Cost

Add Material

Clear

Submit

DRAFT COPY