Frequently Asked Questions (FAQs)

APT

FOR

Customer Relationship Management for Division Office

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DISCLAIMER:

The Operational procedure provided in this Operational Guide is just an illustration for the user for using the IT 2.0 Software in an effective manner. If the Reader is having any doubt in the department Rulings and guidelines, he/she should refer to the respective manuals and volumes only. The IT 2.0 Operational Guide should not be sighted as Rulings.

Frequently Asked Questions (FAQs) : Customer Relationship Management (for Division Office)

1. What is the purpose of the Operational Guide on Customer Relationship Management (CRM) for Administrative Offices?

The Operational Guide on CRM helps administrative offices manage day-to-day CRM activities. It provides a step-by-step workflow for handling bulk registered customer requests related to various contracts through the enterprise portal.

2. Who should use this CRM Operational Guide?

This guide is intended for administrative office (AO) personnel handling CRM processes, particularly those responsible for processing customer requests and contracts.

3. How do bulk registered customers raise CRM requests?

Customers submit requests for various contracts through the enterprise portal. These requests are then processed by the administrative offices following the workflow outlined in the CRM guide.

4. What happens after successful sign-in for Divisional Head / SSRM / SRM Users?

After successful sign-in, users with roles like Divisional Head, SSRM, and SRM will see their home screen with the assigned cards based on their role.

5. How do I access the Customer Relationship Management (CRM) module?

1. Click on the "Customer Relationship Management" card on the home screen.
2. This will display 8 sub-cards related to CRM functions.

6. What sub-cards are available under Customer Relationship Management?

The CRM module includes the following **8 sub-cards**:

1. **Contracts** – Manage customer contracts for various services.
2. **Barcode & Postbag / Post-box** – Assign barcodes and manage postbag/post-box services.
3. **RNP/WPP** – Handle Registered Newspaper Post (RNP) and Weekly Periodical Post (WPP) services.
4. **Bulk Addressee & Bulk Payee** – Manage bulk mailing and payment processing customers.
5. **Bill Generation** – Generate bills for various CRM-related services.
6. **E-Biller Registration** – Register customers for electronic billing services.

7. **Reports** – View and download CRM-related reports.
8. **Special Cover** – Manage special cover requests and approvals.

7. How do I navigate to a specific sub-module in CRM?

1. Click on the **"Customer Relationship Management"** card.
2. Select the desired **sub-card** from the **8 available options**.

8. Can different users access different CRM sub-cards?

Yes, access to specific sub-cards depends on user roles (Divisional Head, SSRM, SRM, etc.), and only assigned modules will be visible to each user.

9. What should I do if a sub-card is not visible on my screen?

Ensure that you are **logged in with the correct role**.

10. What is the purpose of the 'Contracts' card in CRM?

The **'Contracts'** card allows the **Divisional Head** to **check, approve, renew, reject, and manage contracts** related to Customer Relationship Management (CRM).

11. What options are available under the 'Contracts' card?

The **Divisional Head** will see the following options:

1. **Pending Contracts** – View and approve contracts that are awaiting action.
2. **Approved Contracts** – View a list of successfully approved contracts.
3. **Reverted Contracts** – View contracts that have been sent back for modifications.
4. **Rejected Contracts** – View contracts that have been declined.
5. **Renewal Requests** – View requests for contract renewal.
6. **Renewed Contracts** – View contracts that have been successfully renewed.
7. **Termination Requests** – Review contracts requested for termination.
8. **Terminated Contracts** – View a list of contracts that have been terminated.
9. **Booking Reports** – Generate and view reports related to contract bookings.

12. What is the 'Pending Contracts' option used for?

The **'Pending Contracts'** option allows the **Divisional Head (DH)** to review, scrutinize, and take action on contracts created by customers through the **Enterprise Portal**.

13. How do I access pending contracts?

1. Click on **'Contracts'** under the **Customer Relationship Management (CRM)** module.
2. Select **'Pending Contracts'** to view all contracts awaiting scrutiny.

14. How do I scrutinize a pending contract?

1. Find the contract in the **Pending Contracts** list.
2. Click on **'Scrutinize'** next to the contract ID.
3. A window will open displaying **contract details** submitted by the customer.
4. Scroll down to review additional contract details and uploaded documents.

15. What documents must be checked before approving a contract?

The customer must upload:

- **Signature document**
- **Bank Guarantee document**

16. How do I download customer-uploaded documents?

- Click **'Signature'** to download the customer's signature.
- Click **'Bank Guarantee'** to download the bank guarantee document.

17. What actions can the Divisional Head take after scrutiny?

The DH can choose to:

1. **Approve** – If all documents and information meet the requirements.
2. **Revert** – If additional information or corrections are needed.
3. **Reject** – If the customer **fails to provide** necessary documents after multiple reversions.

18. How can I check the list of all available contracts for bulk customers in a division?

To view all available contracts, the Division Head (DH) must click on **'Approved Contracts'** in the system. This will display a list of all active contracts.

19. Where can I find the option to terminate a contract?

Under the **'Actions'** column, next to each **Contract ID**, there is a **'Terminate Contract'** button. Clicking on this button initiates the contract termination process.

20. What happens after I click 'Terminate Contract'?

An **Alert dialogue box** will appear, asking for confirmation. You will have two options:

- Click **'Yes, Terminate this contract'** to proceed with termination.
- Click **'No'** to cancel the termination process.

21. Can I undo a terminated contract?

No, once a contract is terminated, it cannot be undone. Ensure you review the contract details before proceeding with termination.

22. Who has the authority to terminate contracts?

Only the **Division Head (DH)** or an authorized user can terminate contracts through the application.

23. How do I check contracts that have been reverted?

Click on **'Reverted Contracts'** to view contracts that have been reverted. The system will display the **Customer ID** and **Contract ID** of each reverted contract.

24. How do I check contracts that have been rejected?

Click on **'Rejected Contracts'** to view the list of contracts that were rejected. The system will display the **Customer ID** and **Contract ID** of each rejected contract.

25. How do I check contracts that have been reverted?

Click on **'Reverted Contracts'** to view contracts that have been reverted. The system will display the **Customer ID** and **Contract ID** of each reverted contract.

26. How do I check if a contract renewal request is pending?

Click on **'Renewal Requests'** to check if any renewal requests are pending. Bulk customers can initiate a request for contract renewal, but it must be approved by the **Division Head (DH)** to proceed.

27. How do I check the list of renewed contracts?

Click on **'Renewed Contracts'** to see the list of contracts that have been successfully renewed. If any renewed contracts are available, the system will display the **Customer ID** and **Contract ID** of each renewed contract.

28. How do I process a customer-initiated contract termination request?

Customers can request contract termination through the **Enterprise Portal**. To process these requests:

1. Click on **'Termination Requests'** to view pending termination requests.
2. Locate the contract under **Contract ID** and click **'Approve Request'** next to it.
3. An **Alert dialogue box** will pop up, asking for confirmation.
4. Click **'Approve'** to complete the termination or **'Cancel'** to stop the process.

29. Where can I manually terminate a contract?

Under the **'Actions'** column, next to each **Contract ID**, there is a **'Terminate Contract'** button. Clicking this button initiates the contract termination process.

30. What happens after I click 'Terminate Contract'?

An **Alert dialogue box** will appear, asking for confirmation. You will have two options:

- Click **'Yes, Terminate this contract'** to proceed with termination.
- Click **'No'** to cancel the termination process.

31. Can I undo a terminated contract?

No, once a contract is terminated, it cannot be undone. Ensure you review the contract details before proceeding with termination.

32. Who has the authority to approve renewal and termination requests?

Only the **Division Head (DH)** or an authorized user can approve renewal requests and terminate contracts through the system.

33. How do I check the list of terminated contracts?

Click on **'Terminated Contracts'** to view contracts that have been terminated. The system will display the **Terminated Contract ID** and **Customer ID** for reference.

34. Where can I manually terminate a contract?

Under the **'Actions'** column, next to each **Contract ID**, there is a **'Terminate Contract'** button. Clicking this button initiates the contract termination process.

35. How do I access the Booking Report?

Click on **'Booking Report'** from the **Contracts Sub Card** menu. This will open the **Booking Report** screen.

36. How do I generate a Booking Report for a specific Customer ID?

- Click on the **Customer ID** option.
- Select the desired **Customer ID** from the drop-down menu.

37. How do I select the period for which the report must be generated?

- Choose the desired time period:
  - **Today** – To generate a report for the current date.
  - **Yesterday** – To generate a report for the previous day.
  - Other predefined periods can also be selected.
- Click **'Apply'** to generate the report.

38. What details are displayed in the Booking Report?

The Booking Report includes the following details:

- **Article Number**
- **Article Type**
- **Booking Date**
- **Booking Time**
- **Booking Office**
- **Destination Office Facility ID**

39. How can I download the Booking Report?

- Click **'Download CSV'** to download the report in CSV format.
- Click **'Download Excel'** to download the report in Excel format.

40. Where can I find the Barcode Requests option?

The **'Barcode Requests'** sub-card is available under the **'Customer Relationship Management'** main card.

41. How do I access pending barcode requests?

- Click on **'Barcode Requests'** under the **'Customer Relationship Management'** card.
- The option **'Pending Barcode Requests'** will be displayed in the sidebar.

42. How can the Division Head (DH) view barcode requests?

- Click on **'Barcode Requests'** to view the list of barcode requests received.
- The DH can also view customer data related to the request in this tab.
- Click the **'View'** button next to a **Request ID** or **Contract ID** to fetch details.

43. What details are displayed when viewing a barcode request?

- The **Request ID** or **Contract ID** details.
- The **Number of Barcodes** required by the customer.

44. How does the DH approve a barcode request?

Once the request details are displayed, the **DH** can click on the **'Approve'** button to approve the barcode request.

45. Where can I find the RNP/WPP option?

The **RNP (Registered Newspaper)** and **WPP (Without Pre-Payment)** card is available under the **'Customer Relationship Management'** main card.

46. How do I access pending RNP/WPP applications?

- Click on the **'RNP/WPP'** sub-card.
- Select **'Pending RNP/WPP Applications'** to view all pending applications in the division.

47. How does the Divisional Head (DH) process an RNP/WPP application?

- Click on the **'Scrutiny'** tab to open the RNP license request in a detailed view.
- Click the **'Scrutinize'** button to review the application.
- Scroll down to check the uploaded documents submitted via the enterprise portal.

48. What documents does the customer need to upload?

Customers must upload the following documents:

- **RNI Certificate**
- **Certificate from District, Presidency, or Sub-Divisional Magistrate**
- **List of Bonafide Subscribers**

49. How does the DH take action on an application?

After verification, the DH can:

- **Approve** – If all requirements are met, click **'Approve'** to approve the request.
- **Reject** – If the customer fails to meet the requirements after multiple reversions, click **'Reject'** (this action is final, and the customer must reapply).
- **Revert** – If any requirements are incomplete, click **'Revert'**, enter remarks in the **'Revert Remarks'** field, and click **'Submit Remarks'**.

50. What happens if an application is reverted?

- A pop-up message **"Application Reverted"** will appear.
- The application will be sent back to the customer for necessary corrections.
- The customer must act upon the remarks and resubmit the application.

51. How are WPP applications processed?

The process for WPP applications is the same as RNP applications. However, WPP applications are available in the **Circle Head Login** for approval, rejection, or reversion.

52. Can a rejected application be reconsidered?

No, once an application is **rejected**, it **cannot be reverted**. The customer must submit a new application.

53. How do I check approved RNP/WPP applications?

- Click on **'Approved RNP/WPP Applications'** from the sidebar under the **RNP/WPP** sub-card.
- The system will display details of approved **RNP** or **WPP** customers (if any).

54. Where can I find the Bulk Addressee & Bulk Payee option?

The **'Bulk Addressee & Bulk Payee'** sub-card is available under the **'Customer Relationship Management'** main card.

55. What options are available under Bulk Addressee & Bulk Payee?

After clicking on the **'Bulk Addressee & Bulk Payee'** sub-card, the following options appear in the sidebar:

- **Add Bulk Addressee**
- **View & Modify Bulk Addressee**
- **Add Bulk Payee**
- **View & Modify Bulk Payee**

56. How do I add a Bulk Addressee?

- Click on **'Add Bulk Addressee'** under the **'Bulk Addressee & Bulk Payee'** sub-card.
- Enter/select details for:
  - **Bulk delivery customer**
  - **Bulk delivery address**
  - **Delivery Post Office**
- Click on **'Submit'**.
- A pop-up message will confirm successful submission. Click **'Ok'**.

57. How do I view or modify a Bulk Addressee?

- Click on **'View & Modify Bulk Addressee'** under the **'Bulk Addressee & Bulk Payee'** sub-card.
- A list of existing Bulk Addressees will be displayed.
- To modify, click the **'Edit'** button next to the required entry.
- Update the necessary fields and click **'Submit'**.
- A confirmation pop-up **'Data Updated Successfully'** will appear.

58. Can I download Bulk Addressee data?

Yes, you can download the data in **Excel** or **CSV** format by clicking **'Download Excel'**.

59. How can I search for a Bulk Addressee?

You can use the **Searcher field** to search by **Customer ID** or **Customer Name**.

60. How do I add a Bulk Payee?

- Click on **'Add Bulk Payee'** under the **'Bulk Addressee & Bulk Payee'** sub-card.
- Enter/select details for:
  - **Bulk Payee**
  - **Bulk Payee Address**
  - **Payment Office**
- Click on **'Submit'**.
- A pop-up message **'Registration Successful'** will confirm the addition.

61. How do I view or modify a Bulk Payee?

- Click on **'View & Modify Bulk Payee'** from the sidebar.
- Enter the **Customer ID** or **Customer Name** in the search field or select from the list.
- Click on **'Edit'** next to the Customer ID.
- Update the required fields and click **'Submit'**.
- A confirmation pop-up **'Data Updated Successfully'** will appear.

62. How do I access the Bill Generation feature?

- Click on **'Bill Generation'** under the **'Customer Relationship Manager'** card.
- Two options will appear:
  - **Generate Bills for Bulk Customers**
  - **View all Generated Bills**

63. How do I generate a bill for bulk customers?

- Click on **'Generate Bills for Bulk Customers'**.
- Select **Customer ID** from the dropdown list. The customer name will be auto-filled.
- Select **Contract ID** from the available list. The service type will be auto-filled.
- Choose the **month** and **year** for billing.
- Click on **'Generate Bill'**.
- Click **'View Bill'** to see the generated bill.

64. How do I download a generated bill?

- After clicking **'View Bill'**, scroll down to see the full bill.
- Click **'Download Bill'** to download it in **PDF format**.

65. How can I view all previously generated bills?

- Click on **'View all Generated Bills'** under the **'Bill Generation'** sub-card.
- A list of all generated bills will be displayed.

66. How do I register an E-Biller?

- Click on **'E-Biller Registration'** under the **'Bulk Addressee & Bulk Payee'** sub-card.
- Click on **'Register E-Biller'** from the sidebar.
- A form will appear, requiring details to be entered in different sections.

67. What details are required for E-Biller registration?

- **E-Biller Details**: Enter **Biller Name, Email ID, Mobile Number**, and select a **Biller Category**.
- **Biller Address Details**: Fill in the complete address details.
- **Other Details**:
  - Select **Payment Office** and **Deduction Type**.
  - Choose **Payment Mode, Periodicity, Deduction Rate**, and indicate if it is an **API Biller**.

68. What are Required Fields in E-Biller registration?

- By default, **Field 1 & Field 2** and related fields are available.
- You must enter **essential billing fields** (e.g., Exam Name, Registration Number, and Course Fee for universities).
- Choose the **Field Type** (Numeric, Alphanumeric, Alphabet).
- Define whether the field is **mandatory** or **optional**.
- Specify the **Account Head**.
- If additional fields are required, click **'Click here'** to add more fields.
- If **"Is Field Selectable?"** is set to **"No"**, an additional input field will appear to enter values.
- Click **'+Add Option'** to add more fields if needed.

69. How do I complete the registration?

- After filling in all fields, click **'Submit'**.
- A **pop-up message "Registration Successful"** along with the generated **Customer ID** will appear.

70. How can I download or search E-Biller data?

- Click **'Download CSV'** or **'Download Excel'** to get the list of E-Billers.
- Use the **search field** to find an E-Biller by name.

71. How do I access the Reports section?

- Click on **'Reports'** under the **'Customer Management'** card.
- Three options will be available:
  - **View Customers**
  - **View Contracts**
  - **View Bills**

72. How do I view customer details?

- Click on **'View Customers'** under the **Reports** section.
- A list of all registered customers will be displayed.

73. Can I search for a specific customer?

Yes, use the **search field** to find a customer by **Customer ID** or **Name**.

74. Can I download customer details?

Yes, click **'Download Excel'** to save the list in Excel format.

75. How do I view contract details?

- Click on **'View Contracts'** under the **Reports** section.
- A list of all contracts registered under the division will be displayed.

76. How do I check ledger details for a contract?

- Click on **'View Ledger'** next to the contract ID.
- The ledger details for that contract will be shown.

77. Can I search for a specific contract?

Yes, enter the **Contract ID** in the search bar to find a particular contract.

78. How do I view billing details?

- Click on **'View Bills'** under the **Reports** section.
- Select a **Customer ID** from the drop-down menu.
- The **Customer Name** and **Contract ID** will be auto-filled.
- Click **'View all Bills'** to display the bills related to the contract.

79. Can I see a detailed bill?

Yes, click **'View Bill'** against the respective **Customer ID** to generate a detailed bill for a specific month.

80. Can I download or print the bill?

Yes, you can **download the bill** using the provided option or print it directly.

81. Where can I find the Special Cover Request option?

Click on the **Special Cover** sub-card under the **Customer Relationship Management** card. Then, click on **Special Cover Request** to proceed.

82. What is the role of the Postmaster/Sub Postmaster in managing Postbox/Postbag requests?

The **Postmaster/Sub Postmaster** of delivery post offices is responsible for:

- Reviewing **pending Postbox / Postbag requests** submitted by bulk registered customers.
- Approving or rejecting requests based on availability.
- Assigning Postbox/Postbag numbers after payment confirmation.

83. How do I access pending Postbox/Postbag requests?

1. Click on **'Pending Postbox/Postbag Requests'** from the sidebar.
2. A list of requests submitted by customers will be displayed.
3. Click **'View'** to see details such as:
   - **Request ID**
   - **Customer ID**
   - **Customer Name**
   - **Service Name**

84. How do I approve a Postbox/Postbag request?

1. Click **'Approve'** to approve the request.
2. A confirmation message **'Request Successful, Request for Post Box Approved Successfully'** will appear.
3. Click **'OK'** to complete the approval.

85. What happens after a Postbox/Postbag request is approved?

- The request status changes to **'Approved Pending Payment'**.
- The customer must complete the payment via the **Enterprise Portal**.

86. How do I process a Postbox/Postbag request after payment?

1. Click **'View Post Box/Post Bag Requests'** from the sidebar.
2. Find the request with the status **'Payment Confirmation Pending'**.
3. Click **'View'** to open the request details.
4. Enter the **available Postbox/Postbag number** in the provided field.
5. Click **'Assign'** to complete the process.
6. A confirmation message **'Postbox/Bag No. Assigned Successfully'** will be displayed.

87. How do I reject a Postbox/Postbag request?

1. Click **'View Post Box/Post Bag Requests'** from the sidebar.
2. Find the request you want to reject and click **'View'**.
3. Click **'Reject'**.
4. Select a **reason for rejection** from the available options:
   - **Postbox/Postbag facility not available**
   - **Other** (if applicable, enter the reason in the remarks field).
5. Click **'Reject'** to confirm.
6. A message **'Request Rejected Successfully'** will be displayed.

88. What happens after a request is rejected?

- The request status changes to **'Rejected'**.

- The rejection reason will be visible to the **customer in their Enterprise Portal login**.
- The customer can **appeal** the decision if necessary.

89. What should I do if a customer's payment is not reflected in the system?

- Verify the **payment status** in the **Enterprise Portal**.
- Advise the customer to check for **payment confirmation**.
- If payment issues persist, **escalate the matter to the technical team**.

90. Can a rejected request be reprocessed?

No, once a request is **rejected**, the customer must **submit a new request** if they still require the service.

91. What is the purpose of the 'Contracts' option in Customer Relationship Management?

The Contracts option allows administrative offices to manage customer contracts effectively. It includes functions for approving, reverting, rejecting, renewing, terminating, updating, and viewing contracts, as well as handling BNPL notional credits.

92. What are the different options available under 'Contracts'?
There are 11 options:

1. Pending contracts
2. Approved contracts
3. Reverted contracts
4. Rejected contracts
5. Renewal requests
6. Renewed contracts
7. Termination requests
8. Terminated contracts
9. Update contracts
10. Add BNPL Notional credit
11. View contracts

93. How do I approve a pending contract?

- Go to Pending contracts.

- Click Scrutinize to verify details.
- If correct, click Approve.
- A pop-up message “Contract Approved” will appear.

94. What if documents or clarification are required from the customer?

- In Pending contracts, click Revert.
- Enter remarks and click Submit Remarks.
- A pop-up message “Contract Reverted” will appear.

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95. Where can I view approved, reverted, or rejected contracts?

- Approved contracts: Lists all approved contracts.
- Reverted contracts: Lists all contracts sent back for clarification.
- Rejected contracts: Lists all rejected contracts.

96. How are renewal requests processed?

Click Renewal requests to view all customer-submitted renewal requests. Approved renewals can then be viewed under Renewed contracts.

97. How do I handle termination requests?

- Go to Termination requests.
- Click Approve request and then Approve.
- A message “Contract Terminated successfully” will appear.
- An alert dialogue will prompt for sending SMS and email to the customer. Click Ok, Send.

98. Where are terminated contracts stored?

All terminated contracts can be accessed under the Terminated contracts option.

99. How can I update details of an approved contract?

- Go to Update contracts.
- Click View details next to the approved contract.
- Click Update, modify the fields, then click Save Details.
- A message “Updated successfully” will appear.

100. What is 'Add BNPL Notional Credit'?

It allows authorities to add notional credit to BNPL (Book Now Pay Later) contracts.

- Click Add BNPL notional credit.
- Select the customer and click View BNPL contracts.
- Click Add notional credit, enter the amount, and submit.
- A message "Credit added successfully" will appear.