



**“Best Equity House in India”**

# **Query Management System**

Training Manual

*January 2013*

## Introduction & Objective

- Customers are increasingly demanding in today's world and have high expectations when it comes to service delivery.
- Enhanced service delivery requires constant monitoring and effective management of overall queries received in our companies
- Presently we do not have any particular application which can track all queries and issues received across teams, via different sources.
- These issues are tracked manually and the TAT for query resolution is dependent on manual measures which is difficult to monitor.
- Therefore it is imperative to have an application which
  - Records Queries
  - Measures delivery of response
  - Auto escalates unresolved complaints
  - Generates proper reports and MIS

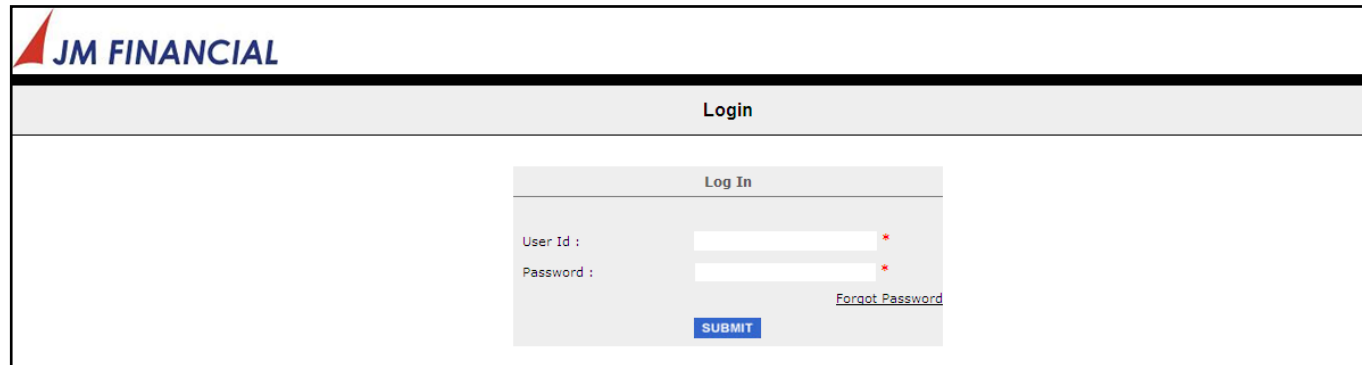
## Introduction & Objective

- Query Management System is a solution designed, which would allow fast and easy tracking of all queries & issues.
- It is an interactive query submission system which provides quick, easy and secure method of raising queries and getting appropriate solutions.
- Few highlights of the Application
  - User friendly interface
  - Multiple queries from all sources can be mapped in the application
  - Can be used by Internal & External Customers
  - Query routed directly to the relevant team responsible for resolution.
  - Auto escalation of queries
  - TAT can be monitored and constantly improved
  - Separate Reports and Analysis available

# Login Details

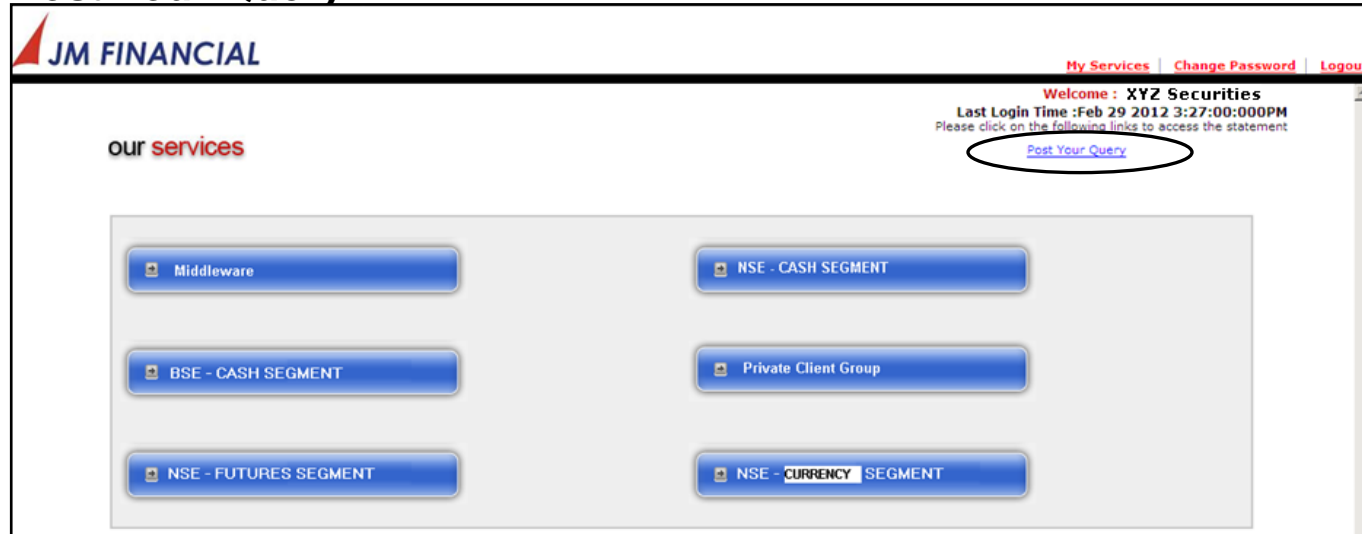
- Franchisee users can access the application by clicking 'Post Your Query' link' in single sign login through url <http://signon.jmfonline.in>.
- **This access is only available in Sub-Broker and View logins**

## Login Screen



The screenshot shows the JM Financial login interface. At the top left is the JM Financial logo. Below it is a header with the word "Login". The main content area contains a "Log In" form with two input fields: "User Id" and "Password", each with a red asterisk indicating a required field. Below the password field is a "Forgot Password" link. A blue "SUBMIT" button is located at the bottom of the form.

## Post Your Query Link



The screenshot shows the JM Financial "Post Your Query" link. At the top left is the JM Financial logo. Below it is a header with the word "our services". In the top right corner, there are links for "My Services", "Change Password", and "Logout". Below these links, the user is welcomed: "Welcome : XYZ Securities" and "Last Login Time :Feb 29 2012 3:27:00:00PM". A "Post Your Query" link is circled in red. Below this, there are six buttons for different services: "Middleware", "BSE - CASH SEGMENT", "NSE - FUTURES SEGMENT", "NSE - CASH SEGMENT", "Private Client Group", and "NSE - CURRENCY SEGMENT".

# Enter a Query

**JM FINANCIAL**  
WelCome : B - sumithrat

**Submit Ticket**

Name : \* [Text Field]  
Email : [Text Field] Either Email or Mobile is mandatory  
Mobile No: [Text Field]  
Tel No : [Text Field]

Search Criteria :  Globally  
Select Business Area : \* --Select--  
Select Query Category : \* --Select--  
Select Query Sub Category : \* --Select--  
Priority : \* --Select--

Problem Summary : [Text Field]  
Problem Description : Maximun 200 characters can be entered

Client Type :  New Customer  Existing Customer Business Segment : --Select--  
Select Number Of Client Code : --Select--

Attachment 1 : [Text Field] Browse...  
Attachment 2 : [Text Field] Browse... Following type of file extension are allowed to upload -: .rar,.zip,.txt,.doc,.docx,.xls,.xlsx,.jpg,.png,.gif,.pdf

Submit

Note : Total size of all file should not be greater than 1 MB.  
All \* marked fields are mandatory.

- **Note:** In the above form in email id field, you need to mention your own email id, to which you want the **query raised & closure confirmation mail** to get triggered.
- Select the correct Business Area, Query Category and Query Sub-category, so that you query will routed to correct team responsible for providing resolution. Use Search Criteria to effectively select these fields
- Enter the Problem Description mentioning complete details of your query.

# Query Status

HOME
REQUEST CENTRE
Submit Ticket
Status of Requests
Downloads
Knowledge Center

- **Submit Ticket**
  - A new query/request can be raised through the link.
- **Status of Request**
  - All requests which have been raised would reflect under this link
  - Branches & Franchisees would be able to view separate ticket details in the listing view for multiple ticket numbers generated through the same request form
  - The multiple client codes for which the query has been raised will reflect in the listing view for easy identification of the client.

Ticket Response				
Ticket No	Ticket Created On	Client Code	Problem Summary	Ticket Status
5	Mar 8 2011 3:24PM	11711675	Sec Market-Funds-Late Payment Charges-Request for Late Payment Statement	Pending
5	Mar 8 2011 3:24PM	11711671	Sec Market-Funds-Late Payment Charges-Request for Late Payment Statement	Pending

**Note:** Under '**Status of Request**' link, branch users will be able to view only queries/requests which have been raised from their respective logins.

# Query Status

- **Status of Request----->Ticket Details**

- On clicking any particular ticket number from the listing view, the user can view complete details of the query raised, along with the updated responses received.

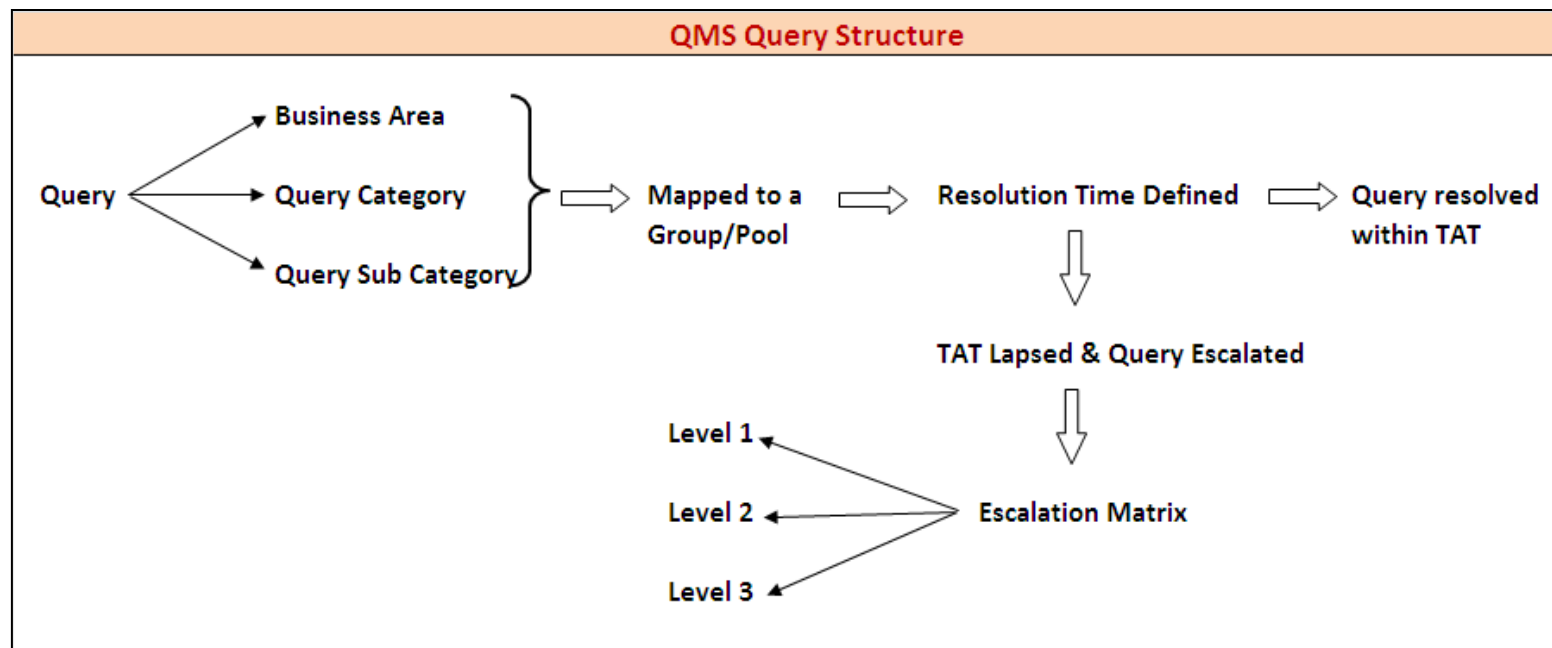
Ticket Details

Ticket No :	5
Raised Date :	Mar 8 2011 3:24PM
Name :	Chetan Shah
Email :	Chetan.shah@yahoo.com
Mobile No :	9820456212
Tel No :	2645213
Client Code/Business Segment :	11711675
Support Category :	Request for Late Payment Statement
Priority :	High
Problem Summary :	Sec Market-Funds - Late Payment Charges - Request for Late Payment Statement
Ticket Status :	Pending
Problem Description :	Pls send me the statement
Attachments :	
Reply If Any :	

Reply	Reply Date Time
The charges would be rectified shortly and we will confirm the status	2011-03-17 12:41:55
We are looking into the matter and the same will be resolved shortly	2011-03-08 15:42:48


## Escalations – At HO

- Each query is mapped to a group at HO and has a resolution time (TAT) within which the query has to be replied and marked closed.
- In case the query is not resolved within the TAT defined in the escalation SLA, the query would be escalated.
- Generally there are 3 escalation levels set for each query with Escalation Authorities and TAT mapped.



## Emails - New Request

- On raising a request mail is triggered **to the email id filled in the request form.**
- Branches and Franchisees should ensure that they mention the correct Client email while raising a request
- The time highlighted in the mail would reflect the Resolution time defined for the query within which the query should be resolved.

	<b>SQLDBA &lt;SystemAdministrator@jmfincial.in&gt;</b> 03/04/2011 03:59 PM Please respond to dba.sql@reliableconsultant.net	To: <a href="mailto:anita.naidu@gmail.com">anita.naidu@gmail.com</a> cc: bcc: Subject: Query: Sec Market-Funds - Late Payment Charges - Request for Late Payment Statement Ticket No :4
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Dear Anita Naidu

Thank you for raising a request. The details of your query is as follows:

Support Request Details

Ticket No: 4

UCC/RCode: 10310675

Problem Summary: Sec Market-Funds - Late Payment Charges - Request for Late Payment Statement

Problem Description: Please mail me the statement

Priority: High

Attached Files

We will revert to you within 1 hours. In case your query requires further investigation and takes a longer time, we will keep you informed


Alternatively you could login to our website and check the status of the query at your convenience.

At your service always.

Regards,

Customer Support Desk,


JM Financial Services

 [ddafb169-c604-45fa-b342-f4d7a832efbd.doc](#)

This is an auto-generated email. Please do not reply directly to this email.

## Emails – Closure

- On query closure a triggered to the email id filled in the request form confirming the client/franchisee the closure status.

	<b>SQLDBA &lt;dba.sql@reliableconsultant.net&gt;</b> 02/11/2011 07:19 PM Please respond to dba.sql@reliableconsultant.net	To: <b>haresh.sharma@gmail.com</b>
		cc:
		bcc:
		Subject: Query Completed of Customer Haresh Sharma with Ticket No: 455

Dear Haresh Sharma

The below query raised by you has been completed and closed. Kindly find the query details and response for reference.

Support Request Details

**Ticket No:** 455

**Status:** Closed

**Date Created:** Feb 10 2011 1:26PM

**Problem Summary:** Customer Support - Statments - Request for statments

**Problem Description:** testing Escalations feb 10

**Priority:** High

**Response:** Closed Testing in mail

Attached Files

We hope the query has been resolved to your satisfaction. Incase you require further details or clarifications, we would request you to post a new query through our website.

We look forward to be of assistance to you.

Regards,

**Customer Support Desk,**

**JM Financial Services**

This is an auto-generated email. Please do not reply directly to this email.

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*So . . . .*

*Are you ready  
to start*