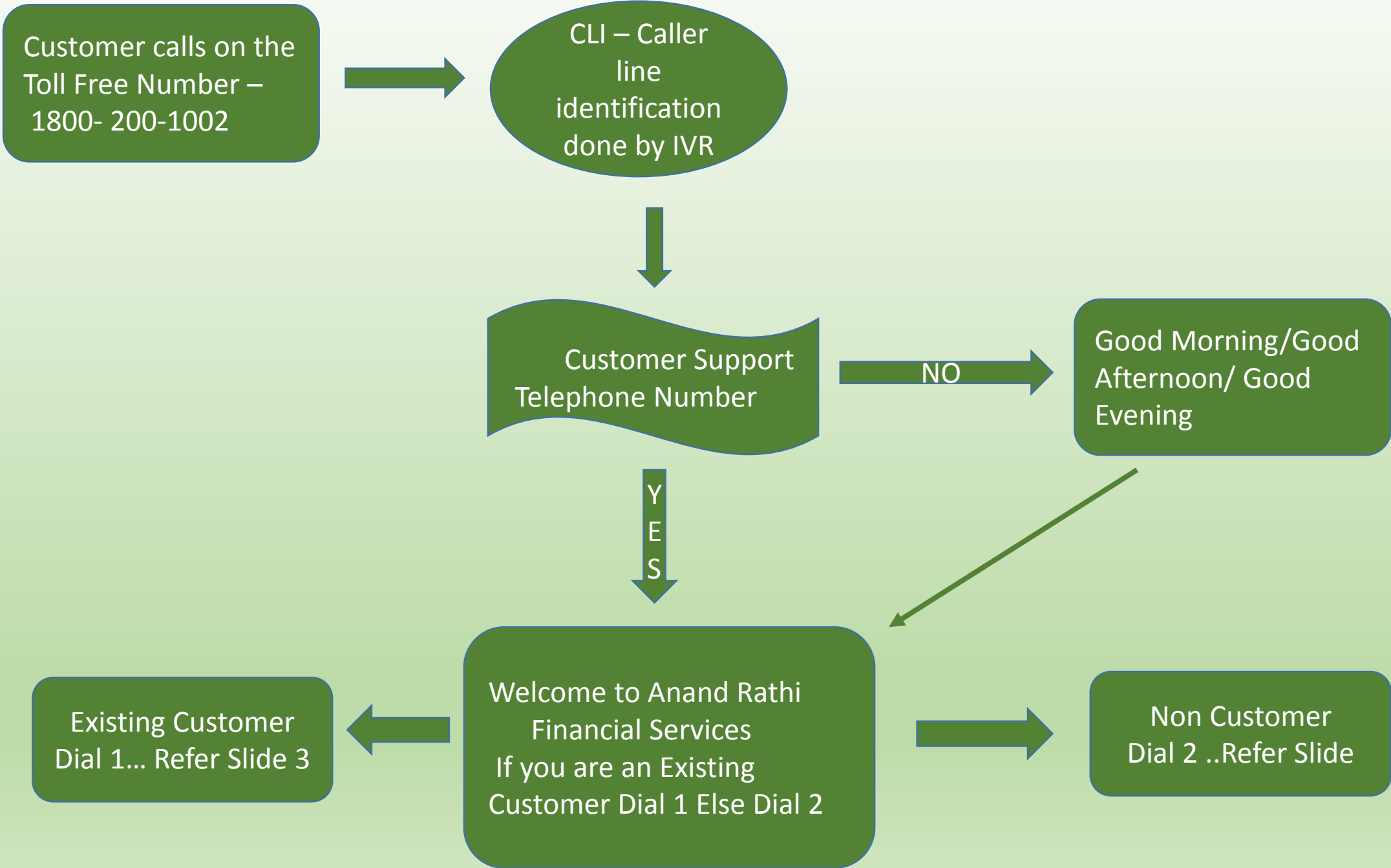




# Customer Support : IVR Main flow



Existing Customer Dials 1 and is routed to following IVR flow

Dial 1 for Equities

For Commodities and  
Currency Dial 2

Dial 3 for Customer  
Support Desk

Dial 4 for information on  
our Products and Services

Dial  
1

Please enter  
your 8 digit  
customer  
Identification  
number

Refer  
Slide 4

Dial  
2

Dial 1 if you know  
your Phone ID &T pin

Please enter your 8  
digit customer  
Identification number

Refer  
Slide 4

Else  
Dial 2

Please wait while we  
connect you to our  
Customer Service  
Representative

Connect to a  
CSR Refer  
Slide

Refer  
Slide 6  
& 7

Dial # to repeat  
these options  
again

3 Chances and then  
call is disconnected/  
transferred to CSR

T Pin Validation

Please enter your 8 digit customer Identification number

Customer Enters Customer ID

Digit Validation Check

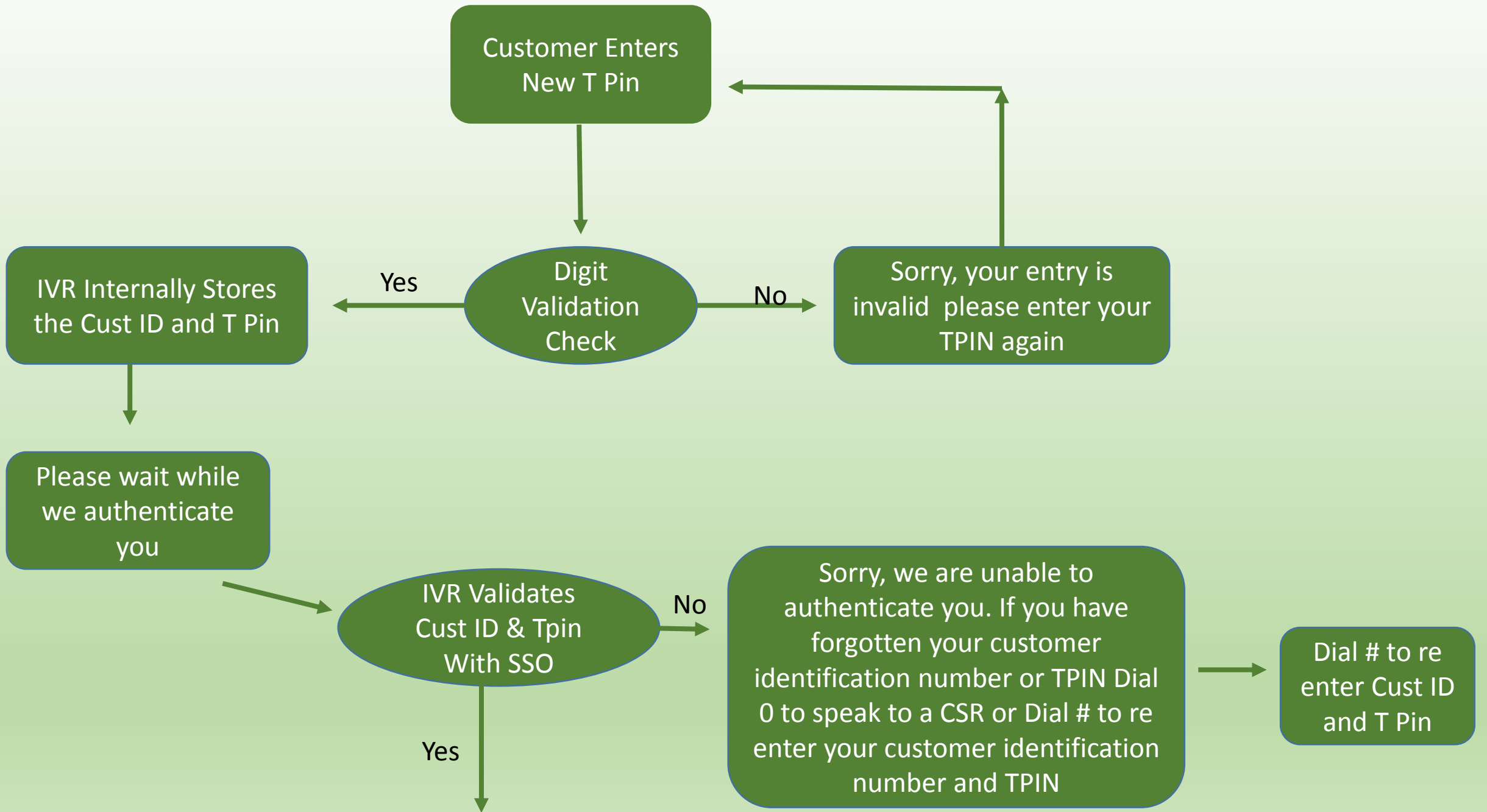
Sorry, your entry is invalid please enter your customer identification number again

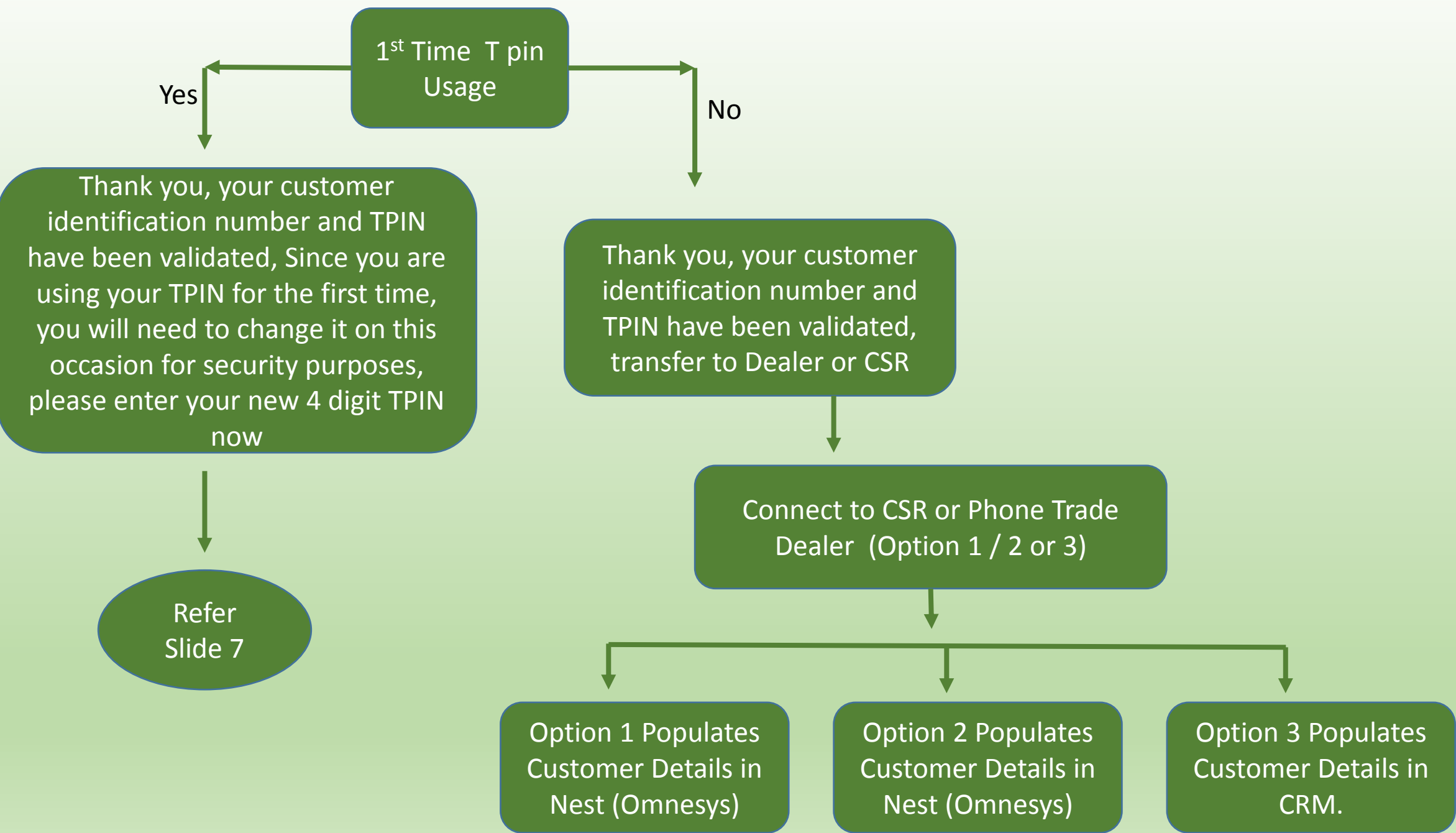
Please enter your 4 digit TPIN now

3 Chances and then the call is disconnected / Transferred to CSR

Yes

No





1<sup>st</sup> Time T pin Usage

Yes

No

Thank you, your customer identification number and TPIN have been validated, Since you are using your TPIN for the first time, you will need to change it on this occasion for security purposes, please enter your new 4 digit TPIN now

Thank you, your customer identification number and TPIN have been validated, transfer to Dealer or CSR

Connect to CSR or Phone Trade Dealer (Option 1 / 2 or 3)

Refer Slide 7

Option 1 Populates Customer Details in Nest (Omnesys)

Option 2 Populates Customer Details in Nest (Omnesys)

Option 3 Populates Customer Details in CRM.

# T Pin Change Option

Thank you, your customer identification number and TPIN have been validated, Since you are using your TPIN for the first time, you will need to change it on this occasion for security purposes, please enter your new 4 digit TPIN now

Customer enters New TPIN

No

No TPIN Entry

Sorry, you have not entered your TPIN, Please enter your TPIN now

2 Chances and then call disconnected/ transferred to CSR

Thank you, please re-enter your TPIN again to confirm

Yes

Customer Re-enters New TPIN

Yes

Digit Validation Check

No

Sorry, your entry is invalid, please re-enter your TPIN again

Digit Validation Check

NO

Sorry, your entry is invalid, please enter your TPIN again

Sorry, the new TPIN entries do not match, please re-enter your new TPIN again

Manual Authentication

Please wait while we connect you to our Customer Service Representative

CSR Confirms with customer details for submission on the manual Authentication Interference

CSR enters customers details In the fields

- Customer Id
- Client Code
- DP Id
- Registered Bank
- Account Number

Data Fields	Details	Check Box
Client Name		<input type="checkbox"/>
Address1		<input type="checkbox"/>
Address2		<input type="checkbox"/>
Address3		<input type="checkbox"/>
Pin Code		<input type="checkbox"/>
City		<input type="checkbox"/>
Date of Birth		<input type="checkbox"/>
Pan Number		<input type="checkbox"/>
Contact No		<input type="checkbox"/>
Mobile No		<input type="checkbox"/>

Optional Populate Customer details in CRM

Refer Slide 5 for T pin change and Validation

Validation of Cust Id with Web SSO

CSR terminates the call

YES

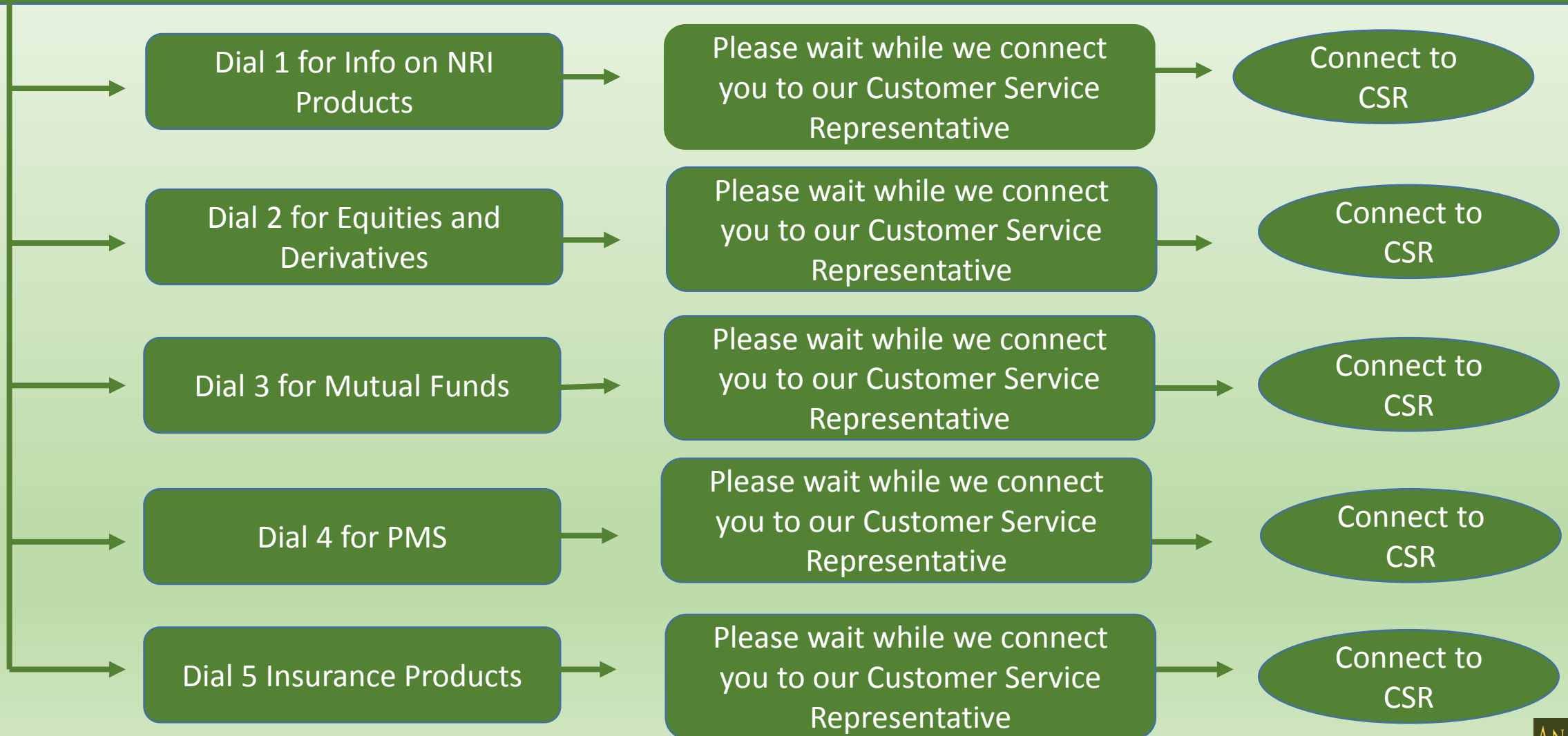
YES

No



## If Dialed 4

Dial 1 for information on NRI Products, Dial 2 for Equities and Derivatives, Dial 3 for Commodities, Dial 4 for Mutual Funds, Dial 5 for Portfolio Management services, Dial 6 for Insurance Products, Dial 7 for Info on Global Trading Products, Dial # to repeat these options, Dial 9 to return to the main menu, Dial 0 to speak with CSR



## If Dialed 4

Dial 1 for information on NRI Products, Dial 2 for Equities and Derivatives, Dial 3 for Commodities, Dial 4 for Mutual Funds, Dial 5 for Portfolio Management services, Dial 6 for Insurance Products, Dial 7 for Info on Global Trading Products, Dial # to repeat these options, Dial 9 to return to the main menu, Dial 0 to speak with CSR



Holiday or Non working day IVR Process

Out of Hours/Holiday

Dear Customer, (our business hours are from 9 am to 6 pm from Monday to Friday), our customer service executive will get in touch with you at the same number, to enter a different number Dial 1

Customer Contact Number and Timestamp stored in a CSV file

Please enter your contact number

Customer Inputs Number

The number dialed by you is \_\_\_\_\_ if the number is correct then dial 1 to continue else dial '#' to reenter the number

Thank you for your interest. Our customer service Team will get in touch with you within 24 business hours

Dial #

CSAT (Feedback Page)



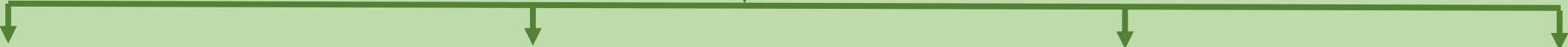
Agent Transfer the Call For Customer Feedback



Welcome to the Feedback System. We would like to know about your experience with our Call Center today



You can Register your feedback and rate our services by using the Number 1 to 5 in your phone keypad

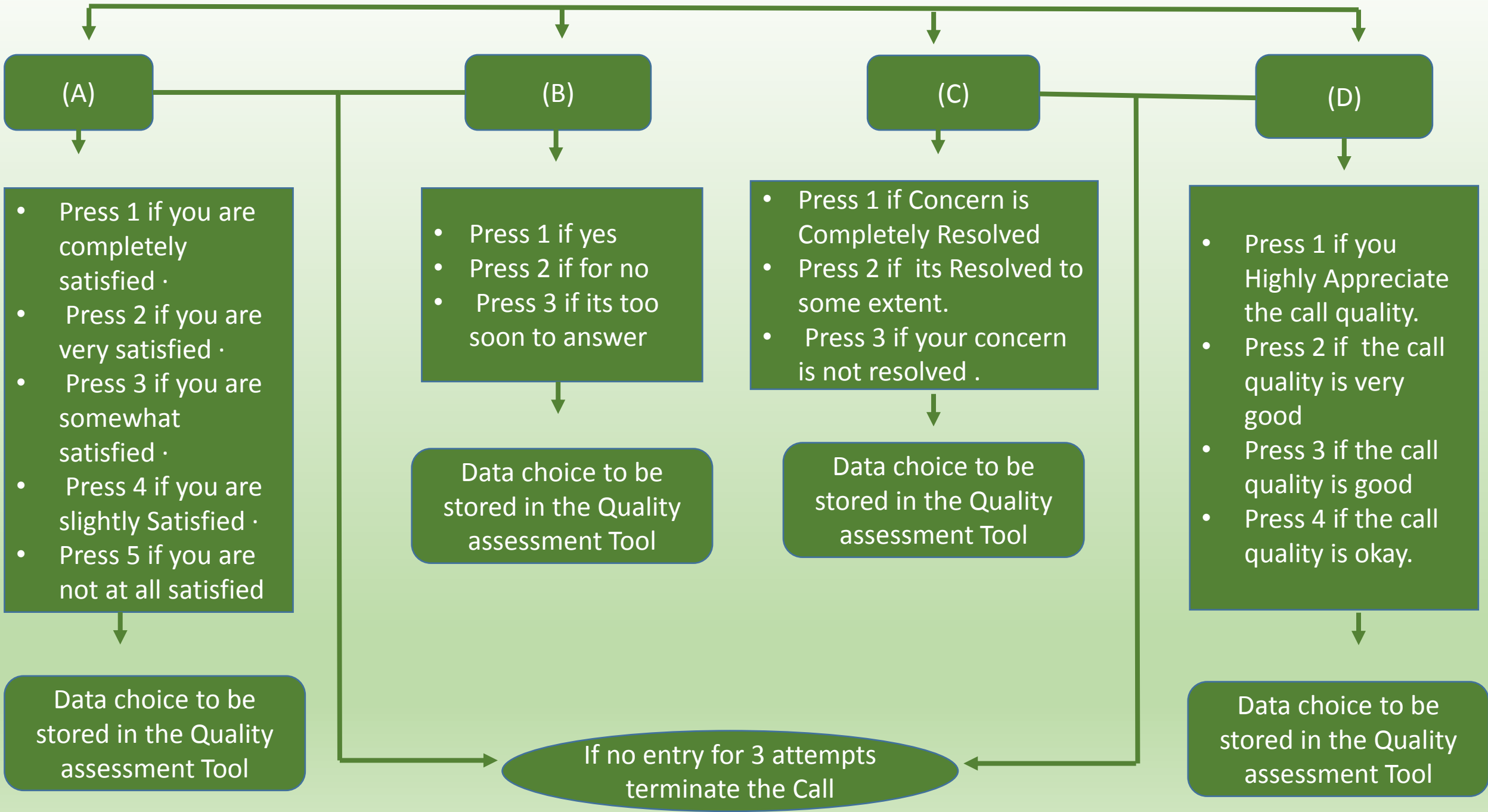


How Satisfied were you with the representative you just spoke to (A)

Was your question or concern resolved the first time you contacted us (B)

Have your concern or question fully resolved (C)

Did We make you feel appreciated as a customer (D)



(A)

- Press 1 if you are completely satisfied ·
- Press 2 if you are very satisfied ·
- Press 3 if you are somewhat satisfied ·
- Press 4 if you are slightly Satisfied ·
- Press 5 if you are not at all satisfied

Data choice to be stored in the Quality assessment Tool

(B)

- Press 1 if yes
- Press 2 if for no
- Press 3 if its too soon to answer

Data choice to be stored in the Quality assessment Tool

(C)

- Press 1 if Concern is Completely Resolved
- Press 2 if its Resolved to some extent.
- Press 3 if your concern is not resolved .

Data choice to be stored in the Quality assessment Tool

(D)

- Press 1 if you Highly Appreciate the call quality.
- Press 2 if the call quality is very good
- Press 3 if the call quality is good
- Press 4 if the call quality is okay.

Data choice to be stored in the Quality assessment Tool

If no entry for 3 attempts terminate the Call