


Case Logger Training

20-01-2020



BERJAYA SOMPO
INSURANCE

Understand and
look deep into
nature.

Welcome,
Sign in to your account and start working.

Admin

...

Login

Having trouble logging in?

OR

Do have an account yet? Email to star.support@daythree.co

Case Logger – Main Screen

Menu Navigation

- 1. Dashboard (Current View)
- 2. Interaction – View interaction activities
- 3. Reporting – View various reports
- 4. User Management – Manage user account profile

C-LOG STATS
Overview of total case handle by agent

Pending	Closed/Resolved	Invalid Case
100% 1	0% 0	0% 0

Activity
Agent's last perform activity in Case Logger (e. Interaction creation/update)

Muhd Fariz Bin Zainol Abidin
1. Type of Interaction: **Complain**
2. Issues/Subject: **Refund Late**
3. Remarks/Description: **Late refund since last year.**
Claim ID: 0000-01
Interaction Created 15 hours ago

Interaction Table

1. Agent able to view his/her own pending case
2. Agent able to view interaction details by clicking on the item

Type	Account Name	Contact Details	Category	Date/Time	Status
Call	Muhd Fariz Zainol Abidin	6011111111	General	2020-01-18 15:49:40	Pending

User Account

1. Show current login agent
2. Click to change password or logout from the system

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How to Log Case for Incoming Call?

New Interaction – Step 1

Dashboard **Interaction** Pending / User Menu **Click on Integration** Muhd Fariz Bin Zainol Abidin

C-LOG STATS

Pending	Closed/Resolved	Invalid Case
100% 1	0% 0	0% 0

INTERACTION – PENDING/FOLLOW-UP

Type	Account Name	Contact Details	Category	Date/Time	Status
Call	Muhd Fariz Zainol Abidin	601111111	General	2020-01-18 15:49:40	Pending

ACTIVITY

Muhd Fariz Bin Zainol Abidin

- Type of Interaction: **Complain**
- Issues/Subject: **Refund Late**
- Remarks/Description: **Late refund since last year.**

Claim ID: 0000-01

Interaction Created 15 hours ago

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New Interaction – Step 2 – Search Account

Search Account

Enter Account Information

e.g. Contact No/Email

Search New Contact Cancel

1. For **Existing** customer, enter Contact No./NRIC/Email then click on Search to search for existing account.
2. For **New** customer in C-Log, click on New Contact to open new account.

New Interaction – Step 3 – Interaction Form

The screenshot displays the Daythree web application interface. At the top, a red navigation bar contains the following menu items: Dashboard, Interaction, Reporting, and User Management. On the right side of the navigation bar, there is a search icon and a user profile for 'Muhd Fariz Bin Zainol Abidin'. The main content area is divided into two columns. The left column features a 'Notes' tab and a form with the following fields: Name, Contact Number, Email, and NRIC. Below these fields is an 'Activity' section showing 'No Activity Found'. The right column features an 'Interaction Form' tab and a white card for 'BERJAYA SOMPO INSURANCE'. The card contains the company logo and a blue button labeled 'Click Here To Start'. A blue callout box with a white border and an arrow points to the button, containing the text 'Click to proceed to interaction form input'. At the bottom left of the page, it says 'Built by Daythree Business Services Sdn Bhd © 2020'. At the bottom right, it says 'Follow us' with icons for Facebook, Twitter, and Google+.

New Interaction – Step 4 – Select Form

Dashboard Interaction Reporting User Management -

Muhammad Fariz Bin Zainal Abidin

Account Information Notes

Name

Contact Number

Email

NRIC

Activity

No Activity Found

Interaction Form Account Information

BERJAYA SOMPO INSURANCE

Click Here To Start

Interaction Form!

Select Your Form

General

General

SUBMIT CANCEL

Interaction Form

1. Select Form pertaining to the call
2. Click on Submit button to open selected form

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New Interaction – Step 5 – Form Entry

Dashboard Interaction Reporting User Management - Muhd Fariz Bin Zainol Abidin

Account Information Notes

Name

Contact Number

Email

NRIC

Activity

No Activity Found

Interaction Form Account Information

This will show all information related to customer

Interaction Details

1. Type of Interaction **Required**

Select...

2. Issues/Subject **Required**

3. Remarks/Description **Required**

Interaction Type **Required**

Call

Ticket Status **Required**

Pending

Submit Cancel

1. Enter Customer's details

2. Enter Interaction Details

3. Click to save interaction & create the account

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Interaction – Account Information (WIP with API)

Remark: This information will be populate from the integral system via API in the future

How to View/Update Submitted Case?

Existing Interaction – Step 1

The screenshot displays the Daythree dashboard interface. At the top, there is a navigation bar with 'Dashboard', 'Interaction', 'Reporting', and 'User Management' menus. The user profile 'Muhd Fariz Bin Zainol Abidin' is visible in the top right corner.

C-LOG STATS

Pending	Closed/Resolved	Invalid Case
100%	0%	0%
1	0	0

ACTIVITY

Muhd Fariz Bin Zainol Abidin

- 1. Type of Interaction: **Complain**
- 2. Issues/Subject: **Refund Late**
- 3. Remarks/Description: **Late refund since last year.**

Claim ID: 0000-01

Interaction Created 15 hours ago

INTERACTION - PENDING/FOLLOW-UP

Type	Account Name	Contact Details	Category	Date/Time	Status
Call	Muhd Fariz Zainol Abidin	6011111111	General	2020-01-18 15:49:40	Pending

Click on pending case for the update

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Existing Interaction – Step 2 – View Details

This will show account detail created

Account Information Notes

Name
Muhd Fariz Zainol Abidin

Contact Number
6011111111

Email
farizhuhu@gmail.com

NRIC
000000-00-00

[Update Account Details](#)

Activity

Muhd Fariz Bin Zainol Abidin
Call / Ticketing / General [View Details](#)

Ticket ID:1 Pending Escalation: End 15 hours ago

This will show last interaction activity

Existing Interaction – Step 3 – Update Interaction

Interaction Form | Account Information | Interaction Details x

Interaction Details

1. Type of Interaction
Complain

2. Issues/Subject
Refund Late

3. Remarks/Description
Late refund since last year.
Claim ID: 0000-01

Interaction Type
Call

Ticket Status
Pending

Update/Save

Last Updated By: N/A
Last Updated Date/Time: N/A

Activity Timeline

Muhd Fariz Bin Zainol Abidin
Call / Ticketing / Interaction Created

Interaction Details:
1. Type of Interaction: **Complain**
2. Issues/Subject: **Refund Late**
3. Remarks/Description: **Late refund since last year.**
Claim ID: 0000-01

Ticket ID: Pending

15 hours ago

1. Update latest interaction details

2. Click Update/Save the interaction

How to View Report?

View Report – Step 1

Dashboard Interaction **Reporting** Management

Click on Reporting

Muhammad Fariz Bin Zainol Abidin

C-LOG STATS

Pending	Closed/Resolved	Invalid Case
100%	0%	0%
1	0	0

INTERACTION – PENDING/FOLLOW-UP

Type	Account Name	Contact Details	Category	Date/Time	Status
Call	Muhammad Fariz Bin Zainol Abidin	6011111111	General	2020-01-18 15:49:40	Pending

ACTIVITY

Muhammad Fariz Bin Zainol Abidin

- Type of Interaction: **Complain**
- Issues/Subject: **Refund Late**
- Remarks/Description: **Late refund since last year.**

Claim ID: 0000-01

Interaction Created 15 hours ago

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View Report – Step 2

The screenshot shows a web dashboard with a red header. The header contains navigation links: Dashboard, Interaction, Reporting, and User Management. On the right side of the header, there is a search icon, a user profile icon for 'Muhd Fariz Bin Zainol Abidin', and a dropdown arrow. Below the header, there is a 'REPORTING' section with a table. The table has columns for 'Form ID', 'Form Type', 'Form Name', and 'Action'. A single row is visible with the following data: Form ID: 1, Form Type: Ticketing, Form Name: General. In the 'Action' column of this row, there is a 'Download Report' button with a green download icon. A blue box highlights the button, and an arrow points from a text box below it to the button. The text box contains the instruction 'Click Download Report'. At the bottom left of the dashboard, it says 'Built by Daythree Business Services Sdn Bhd © 2020'. At the bottom right, it says 'Follow us' followed by social media icons for Facebook, Twitter, and Google+.

Form ID	Form Type	Form Name	Action
1	Ticketing	General	Download Report

Click Download Report

View Report – Step 3

Case ID	Form Status	Interaction Channel	Cust. Name	Cust. Contact	Cust. Email	Cust. NRIC	Type of Interaction	Issues/Subject	Remarks/Description	Created By	Created Date/Time	Last Update By	Last Update Date/Time
1	Pending	Call	Muhd Fariz Zainol Abidin	60111111111	farizhu@gmail.com	000000-00-00	Complain	Refund Late	Late refund since last year.\nClaim ID: 0000-01	Muhd Fariz Bin Zainol Abidin	18/01/2020 15:49		0000-00-00 00:00:00

Remark: This is sample report (i.e. Raw Data from the system) and will be enhance in the future

