Fluentgrid CRM™

Product Feature Guide

Version 4.5

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Fluentgrid CRM™

Overview

Fluentgrid CRM offers an integrated customer communication toolset for continuous engagement with utility consumers. Customer Service Center, eCall and Customer Self Serv Portal and Mobile App provide a wide set of features to enhance the customer experience with the utility services.

Customer service requests and their realization through defined process

Customer Service

Efficient handling of the customer calls through IVRS, ACD, CTI

eCall

CRM

Customer Mobile App

Self service Mobile App for utility consumers to view bills, make payment and create service requests

Customer Portal

Self service portal for utility consumers to view bills, make payment and create service requests

Customer Service Center (CSC)

The complete management of the consumer requests/complaints from the minute they are raised till they are resolved/ closed. Complaint registration, dispatch of the request to the right department and authority, escalati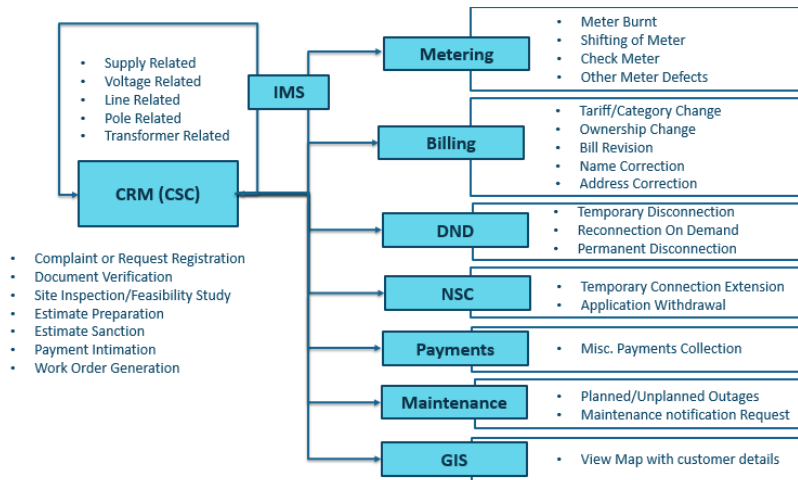on and tracking the entire journey of the process to address the consumer requests play a vital role in enhancing customer satisfaction.

Overview

The CRM can be integrated with CIS to dispatch the consumer requests to the respective departments and resolve the issues through various process flows in the respective modules of CIS.

Configuration

Configure Request/Complaint type, causes, their status, supporting documents to upload and the Activity Service Levels.

Complaints

Register a complaint from the consumer with the necessary details like Consumer Number, Phone number, contact details. Complaint type and the priority of the complaint along consumer details are registered in the system.

Supply Related	Complaints related to supply, Failed Individual, Supply Failed for a Total Area, Phase Missing and LT Breakdown can be registered.
Voltage	Register complaints related to voltage fluctuation, high voltage, or low voltage.
Line & Pole	Any issues in respect to Line Touching Tree Branches, Line Cut, Pole-related complaints such as rusted or damaged poles, leaning pole or pole fell down can be registered.
Transformer	Complain about transformer burnt, transformer oil leakage, and transformer flames.

Dispatch

Dispatch the registered complaints to the concerned departments and authorities as defined by the work and process flow. The reference/complaint number provides the handle to the request raised and track the status.

Requests

Serive Requests related to meter, bill, connections and disconnections can be registered by providing details like Consumer Number, Phone number, contact details, or other configured details.

Meter	Request for shifting of meter, meter burnt, check meter, and other meter defects.
Billing	Request for billing-related requests such as category change, ownership change, bill revision, name and address correction.
Disconnection	Request for temporary disconnection, reconnection on-demand, and permanent disconnection can be registered.
Connections	Extension on temporary connection or withdrawal of NSC Application requests can be raised.
Theft Related	Meter tampering, unauthorized usage of electricity and theft of electricity requests can be raised.
Verification	Requests can be kept on hold If any discrepancies are observed at any stage while the complete request registration and approval process is carried out.
Inspection	The details collected during the authority visit to the premises for inspection are captured into the system.
Re-Inspection	Initiate further approval process after the concerned authority re-inspects the premises and captures the necessary information.
Quotation/Estimation	Certain estimates for requests like shifting of the meter are entered in the system with approximate estimation amount, the purpose of estimation, and other defined details. The process requires necessary approvals from the concerned authority to proceed further.
Consumer Intimation	Payment/Fees details are intimated to the consumer and generated (Advice Slip) as per the request type and nature
Payment Due	Due dates for the Consumer payments are listed by entering the within payment time and beyond Payment time details.

Pending Requests and Complaints

Unresolved complaints and requests are displayed here with their providing their source and complaint types. The necessary actions can be taken like to update as rectified, mark as invalid, forward for acknowledgement.

Rectified Requests and Complaints

Lists out the details of the complaints and/or requests that are resolved, and supports the Concerned Operator/Supervisor to reach out to consumers present in the list to get feedback. Based on the feedback either the request is opened or closed.

On-Hold

Any disputes occurred at any stage of inspection, estimation then the concerned authority has the feasibility to put the complaint/request on hold.

Escalation

The system supports choosing First, Second, and Beyond the Escalations options in the application concerning complaint/request type.

View Status

The status of the complaints can be viewed either by entering the complaint number or the consumer number or account number or is made accessible to defined authorities.

Power Outage Registration & Restoration

The complete process of outage registration and restoration services including components like outage type, reasons such as planned or unplanned shutdown, load shedding, affected areas, respective substation, feeder, DTR details and the approval process is carried out.

eCall

All the inbound and outbound calls of the call center are handled by the eCall module. The Call center equipped with IVRS as the front end receives the calls dialled to the call center, welcomes with a warm message and follows a defined set of options.
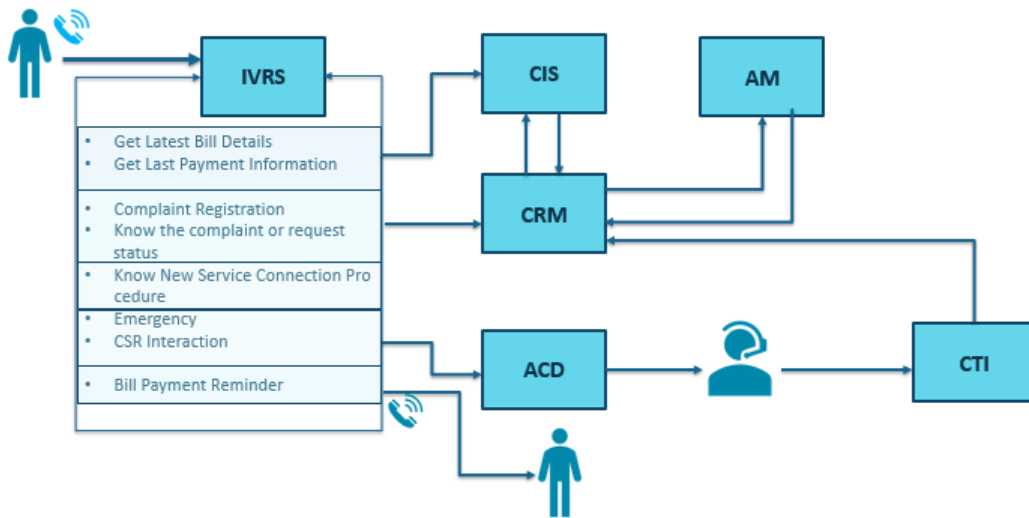
Configuration

The transactional, administrative, and dialer related data can be configured.

Transactional Configuration	Configure the call center application users, i.e. customer support representatives, supervisors, user shifts, user groups, wrap up code, pause code, notices.
Administrative Configurations	Define the required skill groups, ACD groups, phone setup, call time definition in the system. As per the defined parameters, edit the groups and other configured details,
Dialer	Predefine the purpose codes, upload leads, DND/Restricted numbers, priority numbers in the eCall application

Call Switching Equipment - IP-PBX

IP-PBX software supports passing the entered DTMF information to IVR as well as to CSR interfaces. This IP-PBX supports both analog and digital lines and connections to any VOIP gateways.

VOIP Gateways	Allows immediate or progressive shutdowns of single or multiple telephone lines. The tool is integrated and highly secured with supporting features such as Call by Call, Calling Party Numbers(ANI), Called Party Numbers (DNIS) service selection, channel negotiation, D-channel back up, administration connections with automatic restoration, Non-Facility Associated Signaling (NFAS)

Standard Features	IP-PBX systems handle internal traffic between stations and act as the gatekeeper to the outside world. Features such as Call Answering, Call Monitoring, Call Recording, Call Pickup, Call Transfer, Call Hold, Conference Calling, Voicemail, Interactive voice response, Direct Inward System Access (DID)Automatic call distribution and supports several standard voices over IP protocols, including the Session Initiation Protocol (SIP), the Media Gateway Control Protocol(MGCP), and H.323

Interactive Voice Response System (IVRS)

The system interacts with humans through the use of voice and DTMF tones input via keypad. Features such as Welcome Note, Language Menu, Complaint Registration, Get Latest Bill Details, Last Payment Info, Complaint Status, New Connection Procedure, and Operator Interaction are a few of the options supported by the application

Welcome Note	A welcome message is provided in the system and whenever a customer calls the toll-free/allocated number, the system welcomes with a warm message followed by language and menu options.
Language Options	Customer can select required language from the provided language menu that are defined as per the business needs.
Complaint Registration	Customers can register complaints like Power failure, line damage, and any general problems by calling the call center.
Complaint status	The status of the complaint can be known through the system by providing the reference number of the complaint or request.
Bill and Payment Details	Get the latest billing information, last payment details via the IVRS providing the proper reference.
Bill Payment Remainder	Initiate the outbound IVR calls to customer's registered phone numbers to remind them about the pending bill amount before the due date. The bill payment reminder dialer can be controlled by setting the parameters such as active or inactive, the number of days before the due date to remind and bill amount threshold limit, etc.
CSR/Operator Interaction	The system allows emergency option/operator interaction and this call would be forwarded to the CSR. Based on the CSR's availability the call is either routed algorithmically or immediately allocated. If no CSR is available then the call is placed in a queue with a queue number and estimated hold time.
Text to Speech and Fax	Text-to-speech (TTS) feature converts normal language text into speech with required system configurations. Using the speech converter interface, the supervisor can generate speech files. This can also be integrated with FAX
Integrated Auto Attendant	If the caller knows the extension of the party they wish to speak with then they can choose that option in the IVR instead of waiting for the entire IVR message to play.

Automatic Call Distribution

The system has Automatic Call Distribution (ACD) functionality that allows routing incoming/outgoing calls to a specific group of agents based on Dialed Number Identification Service (DNIS). It provides calling party Automatic Number Identification (ANI), agent skills, user-defined business rules, and agent availability.

Call Routing	Call routing has certain predefined instructions that tell the ACD to handle calls inside the system. Depending on the routing algorithm configuration, the next consumer will be selected and will be routed to an available agent. The set of routing algorithms supported by ACD is longest waiting time, fewest calls, and random.
Call Queuing	Once the call is received through IVR, it is placed in a queue and assigned in a first come first serve order. According to the defined algorithm, the calls are allocated based on the availability of CSR, or kept in queue if no one is available. CSR also can view the no. of calls that are in the queue.

Priority Queuing	Supervisor/Designated person can assign priority to important consumers/ utility official's telephone numbers and they can be skipped from the queue and placed in the first line.
Skill-based call routing	The calls can be assigned to the respective skilled representative based on the option selected by the consumer through the IVRS.
Call Overflow Routing	Call overflow routing allows the designated person to configure a call overflow group to forward the call If the call reaches more than the configured drop seconds. This overflow group can be an automated answering service or another department of the contact centre.
Voice Mailing/Messaging	Drop action such as the voice mail option for the caller to leave a voice message can be configured for the calls when they reach the configured drop seconds. These voice messages are sent as e-mail and routed to agents to be addressed by the agents later.
Password Protection	The system supports password protection for authentication and validation of access.

Computer Telephony Integration

Computer Telephony Integration (CTI) enables the connection between the telephone systems and computers to work in sync. This supports the system to control and manage phone functions like making a call, answering a call. Several interface elements (Online, Offline, On-Hold, Pick Up, Recording, Forward etc,) are present in the representative screen to control call in progress by using CTI.

Functional Elements	Several application interface elements such as Online, Offline, On-Hold, Pick Up, Recording, Forward are present in the representative screen to control calls by using CTI
Screen pop-up	System supports agents to use standard desktops to maximize efficiency, both in time spent, as well as customer service interactions. The CSR system has an incoming call announcement facility and also fetches essential information such as caller's history information like billing information, payment information, and complaint information.

Dialer

Dialer enables manual, automatic and predictive dial options to its users.

Manual	Enables manual dial option to its users to make outbound calls manually using the CSR interface. This feature can be governed by designated persons from the users configuration interface.
Automatic	Automatic dialling without any human interaction with a pre-recorded message can be sent/call to end customers for bill payment remainders, to receive complaints or request service feedback.
Predictive	The system employs computer algorithms, based on complex probabilistic and statistical modelling, to make calls to telephone numbers fed to its database and assign live calls to available agents. This is a continuous process, and there is zero wait time for each call.

Voice Logger

System supports All Force(recording all calls), On-Demand(Representative decides to record or not), Never(no call recorder) options concerning call recording. The basic call recording system supports Inbound, Outbound and Conference call recording.

Call monitoring

The application has the listen, barge and whisper options configured in the system for monitoring efficiently.

Dashboard

The dashboard consists of the details like Total Agents Logged In, No of Agents on Ready State, No of Agents on Pause, No of Agents on Call, No of Inbound Calls, No of Outbound Calls, No of Abandoned Calls.

Graphical Charts

Graphical representation for ACD, Agent-Wise and Quarter details provide better intuitive insights.

Reports

Generate reports for Agent Performance, Call Recording, Agent Login and Logout Report, Cradle to Grave Report, Inbound and Outbound Calls Report, IVRS Reports, Frequently Call Reference Reports.

Customer Portal (Web Self Service)

Overview

The customer portal is the front end for the consumer to create his login and add multiple accounts under one login. The consumer has the access to register complaints and service requests from the portal along with the other features to view their historical data, pay bills.
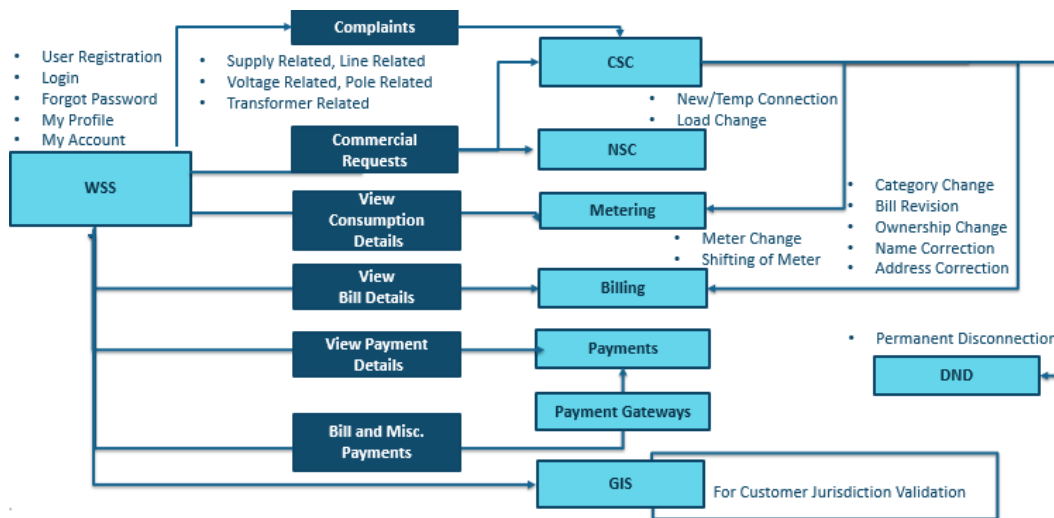
Media Centre Configurations

Configuration and display of media-related information like News, Advertisements, and Photo Gallery of the Utility in the web portal. Configurations are defined by the Admin (or Role-based as per the utility) and the system supports adding, updating, and deletion of the activities.

News	Add, update or delete news details through the web portal. Each news item has additional parameters like date of publishing, title, description news web can also be uploaded as a file with the description and displayed as a hyperlink in the web portal.
Advertisements	Advertisements functionality includes adding an advertisement, updating or deleting existing advertisement details on the advertisement section including Ad posted Date, Title, Description; Image Attachment is supported with required validations.
Photo Gallery	Create a new Gallery, add details (like name, title, or attachments) and add new albums to that Gallery. Add, update or delete the Photo Gallery and Album details.

Information Centre Configurations

Information helpful for the customer like FAQs, Energy Conservation Tips, Associated sites, what's New, Website Feedback, Secret Questions can be configured through the Information Centre Configuration section. Complete configuration activities such as add /Delete/Modify are performed with the respective RBAC personnel.

FAQs	List out the Frequently Asked Questions (FAQ) along with answers in the Web Portal. Authenticated users can configure to add, update or delete FAQ details.
Upload Forms	Upload and download forms for the application of new service connection, ownership change form, and any other forms used in the utility's daily operations. Forms can be made available for download with titles, the type of form (ex: tender notice) through the authenticated users.
Energy Conservation Tips	Energy conservation tips based on categories like Domestic, Rural, and Industrial are configured and displayed in the WSS portal with the tip and attachments if any.
Associated Sites	Configure and display the sites such as SERC, CERC, Ministry of Power that are associated with the Utility in the WSS portal. Website Names along with the URLs are made available on a need basis
What's New	Latest updates in the Utility and prioritizing those updates (such as displaying position for the new update) are facilitated through the web portal. Updates are made available through a file or a redirection to the website having the latest updates with all the configuring properties.
Website Feedback	System supports both receiving (Ratings and Remarks) and responding to the feedback of the respective users through the portal. Feedback feature supports sending the response through the configured email-id.
Secret Questions	Configuration (Add, Update, or Delete) of secret questions and facilitating the consumer to opt for the secret question during the registration is supported by the system. This secret question is tied up with other functionalities like Forgot password / Reset password.

Payment Configurations

Enable and Disable Gateways	The system supports the enablement and disablement of the payment gateways.

General Configuration

Webmaster Email	Customer Feedbacks, Ratings, or Remarks are received to a single communicator i.e. Webmaster Email. Configuration of the System Administrator / Web Master Email ID is carried out through the WSS Portal.
Helpline and Contact Us Numbers	Able to add the helpline and contact us details of utilities that are displayed in the Utility Portal with all the Configurable properties.
Privacy Policies, Acts and Regulations	Privacy Policies, Acts and Regulations of the Utilities can be easily configured using the Privacy Policy. The system also supports features like Titles and Documents Attachments against the respective policies or acts.

Resource Configurations

User and Role Masters	Provision to add Users and their Roles, configuring the necessary user details, and permitting the respective access to the user based on RBAC. The system allows the admin to update or modify user details including removal of access.
Untagging Child accounts	Removal of the child accounts that are associated or tagged to any primary account as per client request.

Functional App Configuration	Configuration of the WSS application version and the Operating system type is administered in the system.
Audit Logs	Managing the event logs for the auditing the activity

Customer Options

User Registration and Login	The user Registration process is facilitated in the system and is successful when the configured details (like Account number, RR Number, Username, Password, Email ID) are submitted after appropriate validation. On successful registration, the user would be able to login into the WSS by entering the user name and details (Password, OTPs, etc.)
Forgot Username and password	The system is well integrated with SMS and Email facilities, and so the recovery of passwords and usernames is made easier with necessary predefined functionalities by sending and confirming user details to the registered mobile no. Or email id.
Change/Update User Details	Capable to change or update the existing user details (user name, password, and mobile no.) by following the process that is configured in the system.

Account Summary

Account detail, Connection Details, Bill Details (Bill amount, bill cycle), Requests and complaints, and Payment details (Payment date, receipt number) can be viewed in the Account Summary page (or dashboard) and also the historic data like year consumption, payment history, previous service requests and complaints are displayed.

Profile Update

Enables the user to update/modify the user profile information (Mobile Number, Primary email, security question, and answer). It also supports the deletion of the complete user profile as well.

NSC Registration Request

Through the WSS Portal, a user can log in and request for a New Service connection, Temporary connection, Load Extension /Reduction, Solar Roof Top Registration completely online rather than the traditional approach.

Complaint Registration

Power Supply Complaints	Power Supply related complaints; Transformer, Voltage, Line, and Safety Complaint can be complained/ submitted by the registered user at a single interface in the WSS portal with ease.
Quick Complaint Registration	Facilitates an unregistered user to register the complaint through quick complaint registration and to register the safety, theft, and general requests

Customer Service/Request Registration

Billing (Bill Revision, Unauthorized usage of electricity, Ownership change), Meter (Check Meter, Meter Change, Post-paid and prepaid Changes) or other customers (Disconnection, Reconnection, Mobile number and Email update) related request is processed by the system when required details are submitted with proper validations.

Billing Related	Bill Revision, Unauthorized usage of electricity, Ownership change-related requests can be made here.
Meter Related	Request regarding Check Meter, Meter Change, Post-paid, and prepaid Meter Changes can be processed.

Customer	Any requests made for Disconnections, Reconnections, Mobile numbers, and Email Updates are carried out with necessary customer data.

View and Track Complaints

The system supports tracking and view the complete status of the requested complaints and registration.

Fast track Registration

WSS's Fast Track services registration process the requests at the earliest. A Registered user can request services like New Connection, Apply for Tariff change, Ownership Change, and load changes.

Online Payments

Bill payments, Miscellaneous payments, Advance payments, Partial payments are done through the system for Single users, multiple users, and groups.

Calculators

The system provides an overview of the calculations for consumption, load, billing, and their estimations based on various criteria/metrics such as consumed units, type of appliances used.

Business Associate

The system supports the self-service registration for business associates i.e. contractors/vendors and other registration relevant features (forgot password, updates/modification of associate details) are facilitated. It enables registered business associates to view the tenders, purchase the tenders and submit the tenders online through the WSS portal.