

Sistem CIDB CRM

Panduan Pengguna

by



*Version 1.0 * 14th January 2020*

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defined.	

- 4.9 Tekan Submit untuk mengemukakan **Error! Bookmark not defined.**

- 5. Kemas Kini Kes Pelanggan..... **Error! Bookmark not defined.**
 - 5.1 Dari menu navigasi, sila tekan My Interaction/Cases -> My Cases -> Open seperti berikut **Error! Bookmark not defined.**
 - 5.2 Sistem akan tunjuk semua case yang telah escalate ke unit sendiri **Error! Bookmark not defined.**
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 - 5.5 Tekan Add Reminder/Notes untuk tambah catatan yang perlu dimaklumkan .. **Error! Bookmark not defined.**
 - 5.6 Masukkan infomasi seperti berikut **Error! Bookmark not defined.**
 - 5.7 Tekan Save changes untuk mengemukakan **Error! Bookmark not defined.**
 - 5.8 Tatal bawah ke sesi Escalation Cases and pilih unit-unit yang anda ingin escalate ke..... **Error! Bookmark not defined.**
 - 5.9 Tekan Update/Escalate Case untuk mengemukakan escalation. .. **Error! Bookmark not defined.**

Change Log

No.	Item	Change By	Change Date	Version
1	Panduan Pengguna Sistem CIDB CRM telah disediakan	Yeap Keng Seng	14-01-2020	1.0

1. Pengenalan

1.1 Tujuan

Panduan ini disediakan bagi penggunaan Sistem CIDB CRM untuk melaporkan interaksi and kes setiap pelanggan.

1.2 Skop

Panduan penggunaan ini meliputi modul berikut: -

No	Nama Modul
1	Interaksi
2	Kes
3	Kemas Kini Kes Pelanggan

2. Masuk ke Portal Web CIDB CRM

Untuk akses ke portal web CIDB CRM, sila layari <https://cidb.daythree.net/>

Masukkan dengan kelayakan log masuk anda pada skrin log masuk.



Username

A text input field with the placeholder text 'Kata Laluan' and a user icon on the right side.

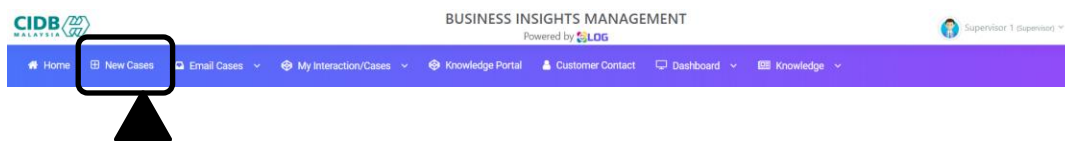
Password

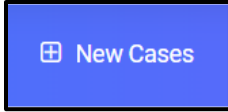
A password input field with a lock icon on the right side.

Login

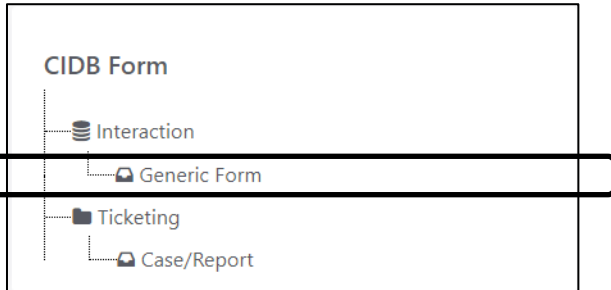
3. Interaksi

3.1 Dari menu navigasi, sila tekan **New Cases** seperti berikut:-





3.2 Sebelah kiri sesi CIDB Form, sila pilih **Generic Form**:-



3.3 Isikan nama penuh atau nombor IC pelanggan:-

Contact Details

Search Contact

950916136047

Search Add Authorize Person

Customer Type * Name * NRIC/Passport * PPK (if Applicable)

Please select... [Redacted] [Redacted] [Redacted]

Contact Number * Contact Number #2 Email (if Applicable) Company Reg. Number (if Applicable) Company Name (if Applicable) Interaction Type * Location/State/Area * Language *

[Redacted] [Redacted] [Redacted] [Redacted] [Redacted] Call Please select... Please sel

3.4 Semakan identity pelanggan. Jika betul, tekan **Select** seperti butang ditunjuk berikut:-

Know Your Contact List

Contact is not found on the list below? **BEFORE** you create a new contact, please try to search using other details.
If contact is not **Unauthorize**, do not reveal any information from CIMS System. You may proceed with any general inquiry.

Account Type	Name	NRIC	BRN	Company Name	Contact #1	Contact #2	Email	Status	Action
Individual	MOHAMMAD FARIZAL BIN MOHAMAD TAJUDIN	950916136047			0173459639			Active	Select

3.5 Jika system melaporkan seperti berikut:-

Know Your Contact List ✖

Contact is not found on the list below? **BEFORE** you create a new contact, please try to search using other details.
 If contact is not **Unauthorize**, do not reveal any information from CIMS System. You may proceed with any general inquiry.

Account Type	Name	NRIC	BRN	Company Name	Contact #1	Contact #2	Email	Status	Action
No Contact Found									

Tekan butang pangkah seperti gambar rajah diatas.

3.6 Pastikan semua maklumat di isi di semua medah dibawah: -

Contact Details

Search Contact

Search
A

Pilih jenis pelanggan

Nama pelanggan

Nombor IC

Nombor PPK

Customer Type *

Name *

NRIC/Passport *

PPK (if Applicable) ↗

Please select...

Contact Number *

Contact Number #2

Email (if Applicable)

Company Reg. Number (if Applicable)

Company Name (if Applicable)

Interaction Type *

Location/State/Area *

Language *

Call

Please select...

Please sel

Nombor telefon

Nombor telefon 2

BRN

Nama Syarikat

Jenis Interaksi

Lokasi Pelanggan

Bahasa

Alamat E-mel

3.7 Selepas semua maklumat pelanggan telah dimasukkan, tekan butang **Add Authorize Person**.

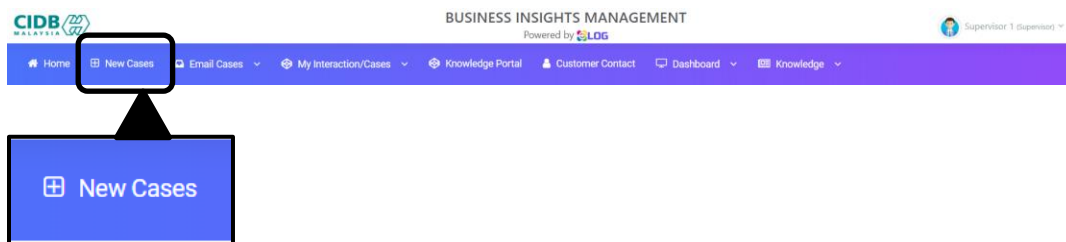
3.8 Tatal ke bawah, masukkan semua medan yang diperlukan ke skrin berikut: -

3.9 Tekan butang **Submit** untuk menyimpan maklumat yang telah dimasukkan.

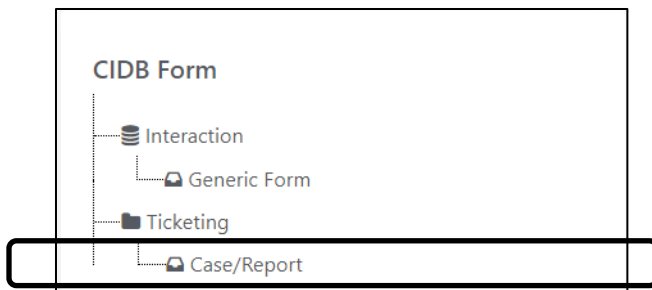
The screenshot shows a form with a text input field at the top. Below it is a section titled "First Call Resolution" containing a dropdown menu with the text "Please select...". At the bottom of the form is a blue button labeled "Submit".

4. Melaporkan Kes Pelanggan ke bahagian lain

4.1 Dari menu navigasi, sila tekan **New Cases** seperti berikut:-



4.2 Sebelah kiri sesi CIDB Form, sila pilih **Case/Report**:-



4.3 Isikan nama penuh atau nombor IC pelanggan-

Contact Details

Search Contact

950916136047

Search Add Authorize Person

Customer Type * Name * NRIC/Passport * PPK (if Applicable)

Please select... [Redacted] [Redacted] [Redacted]

Contact Number * Contact Number #2 Email (if Applicable) Company Reg. Number (if Applicable) Company Name (if Applicable) Interaction Type * Location/State/Area * Language *

[Redacted] [Redacted] [Redacted] [Redacted] [Redacted] Call Please select... Please sel

4.4 Semakkan identity pelanggan. Jika betul, tekan **Select** seperti butang ditunjuk berikut:-

Know Your Contact List

Contact is not found on the list below? **BEFORE** you create a new contact, please try to search using other details.
If contact is not **Unauthorize**, do not reveal any information from CIMS System. You may proceed with any general inquiry.

Account Type	Name	NRIC	BRN	Company Name	Contact #1	Contact #2	Email	Status	Action
Individual	MOHAMMAD FARIZAL BIN MOHAMAD TAJUDIN	950916136047			0173459639			Active	Select

4.5 Jika system tunjuk seperti berikut:-

Know Your Contact List

Contact is not found on the list below? **BEFORE** you create a new contact, please try to search using other details.
If contact is not **Unauthorize**, do not reveal any information from CIMS System. You may proceed with any general inquiry.

Account Type	Name	NRIC	BRN	Company Name	Contact #1	Contact #2	Email	Status	Action
No Contact Found									

Tekan pangkah seperti ditunjuk di gambar atas.

4.6 Masukkan semua medan yang diperlukan ke skrin berikut: -

4.7 Selepas siap isi infomasi pelanggan, tekan **Add Authorize Person**.

4.8 Tatal ke bawah, masukkan semua medan yang diperlukan ke skrin berikut: -

The screenshot shows a web form for creating a case. The form is divided into several sections:

- Top Section:** Contains navigation tabs (Main, Activity, Email Activity) and a form ID: #45-TWYTORG6DPKDULQ.
- Category Selection:** A series of dropdown menus labeled 'Cases Category', 'Sub Category Level 1' through 'Sub Category Level 7'. Annotations include 'Kategori Kes' pointing to the first dropdown, and 'Subkategori 1' through 'Subkategori 7' pointing to their respective dropdowns.
- Case Details:** Includes a 'Case Title' text field (annotated with 'Tajuk Kes'), a 'Case Description' text area (annotated with 'Penerangan Kes'), and a 'Next Escalation Point' dropdown.
- Resolution and Attachment:** Includes a 'First Call Resolution' dropdown (annotated with 'FCR'), an 'Attachment' button labeled 'Select your Attachment' (annotated with 'Lampiran Fail'), and a 'Submit' button.
- Escalation List:** A dropdown menu titled 'Escalation Seterusnya' (Example: Escalation to Careline) showing a list of options. 'Careline' is highlighted in blue. Other options include 'UPP', 'Pengurusan Maklumat (IT)', 'SICW', 'Pendaftaran Kontraktor (SCORE)', 'Pendaftaran Kontraktor (LEVI)', 'Pendaftaran Kontraktor', 'Pendaftaran Personel Binaan', 'Pembangunan Kontraktor', and various Malaysian states (Negeri - Perlis, Kedah, Pulau Pinang, Perak, Selangor, Kuala Lumpur, Melaka, Negeri Sembilan, Johor, Pahang).

4.9 Tekan **Submit** untuk mengemukakan

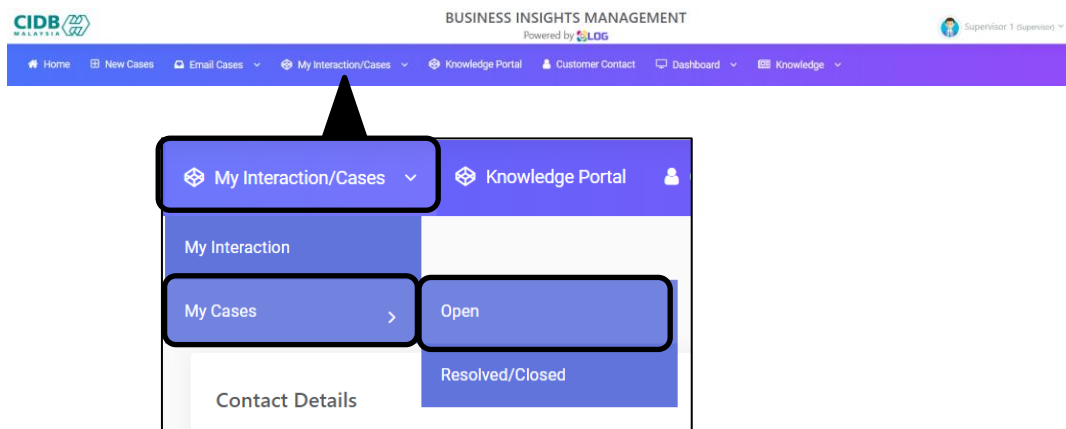
Next Escalation Point

Please select...

Submit

5. Mengemaskini Kes Pelanggan

5.1 Dari menu navigasi, sila tekan **My Interaction/Cases -> My Cases -> Open** seperti berikut:-



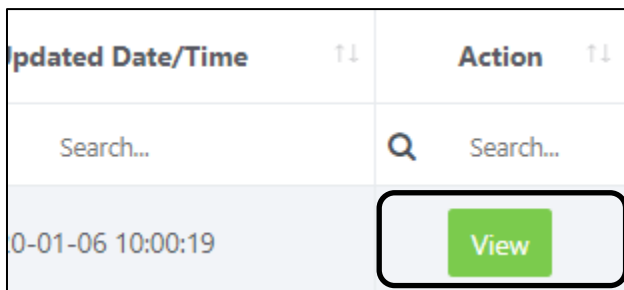
5.2 Sistem akan tunjuk semua case yang telah escalate ke unit sendiri.

My Cases - Open

Show 10 entries [Column visibility](#) [Copy](#) [Excel](#) [CSV](#) [PDF](#) [Export All Data](#) Search:

Report ID	Interaction Type	Contact Name	Contact No	Received Date/Time	Last Updated Date/Time	Action
CRM-15616895411	Email	NOR SHAFIRA BINTI SAIBI	0193357093	2019-07-16 08:35:22	2020-01-06 10:00:19	View
CRM-15616969211	Email	LIM KEE SITT	0124312511	2019-08-28 15:50:37	2019-11-08 10:09:21	View
CRM-15616969211	Email	LIM KEE SITT	0124312511	2019-07-01 10:58:43	2019-12-13 16:31:17	View
CRM-15619543821	Email	TEOH CHIEN CHUNG	0175833913	2019-07-02 13:40:34	2019-12-13 16:30:48	View
CRM-15622050011	Email	TEROPONG BISTARI ENGINEERING	45828305	2019-07-08 09:07:02	2019-12-13 16:26:23	View
CRM-15622264211	Email	KS ELEVATOR ENGINEERING	0	2019-10-08 11:07:27	2020-01-09 09:01:09	View
CRM-15625092011	Email	FAIRUS KHAN BIN ABDUL GHANI	0133286982	2019-07-15 13:05:12	2019-12-13 16:29:56	View
CRM-15625578011	Email	AHO ENTERPRISE SDN. BHD.	193406165	2019-11-15 09:29:05	0000-00-00 00:00:00	View
CRM-15625663211	Email	TYPAX ENGINEERING SDN. BHD.	389433268	2019-07-09 12:35:21	2019-12-13 16:30:21	View
CRM-15625691411	Email	HOI LAI YIN	0123225298	2019-07-18 14:42:06	2019-11-20 10:18:00	View

5.3 Tekan **View** untuk dapatkan catatan kes yang anda ingin membaca.



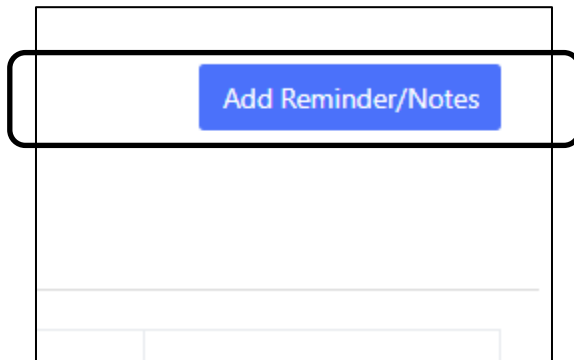
5.4 Tatal bawah ke bahagian Action/Task, anda dapat membaca catatan yang telah dikemaskini pada kes tersebut.

Action/Task [Add Reminder/Notes](#)

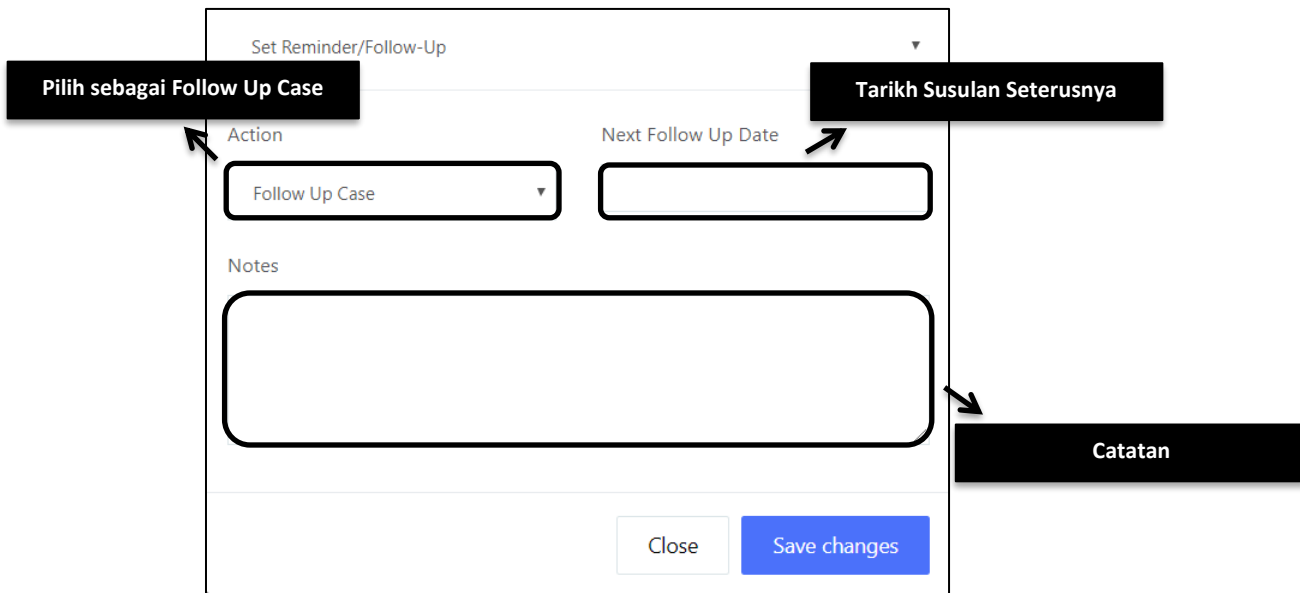
[Reminder](#) [Notes](#) [Activity](#)

Next Follow Up Date	Action	Notes	Created By	Created Date/Time
	Follow Up Case	Isu selesai.	Ali Mokhtar	2019-11-13 15:13:04
	Follow Up Case	Berdasarkan semakan, isu masih belum diselesaikan. Mohon semakan semula.	Ain Pili	2019-12-13 16:29:30

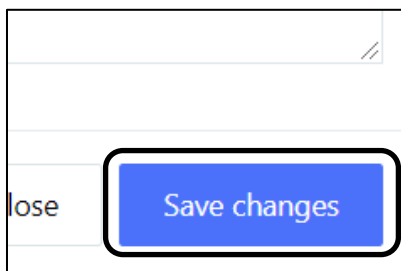
5.5 Tekan **Add Reminder/Notes** untuk tambah catatan yang perlu dimaklumkan.



5.6 Masukkan infomasi seperti berikut:-



5.7 Tekan **Save changes** untuk mengemukakan.



5.8 Tatal bawah ke sesi Escalation Cases and pilih unit-unit yang anda ingin escalate ke.

Escalation Cases

Next Action

UPP

Update/Escalate C

Contohnya anda ingin escalate ke Unit IT, pilih **Pengurusan Malumat (IT)**.

Escalation

UPP

Careline

Pengurusan Maklumat (IT)

SICW

Pendaftaran Kontraktor (SCORE)

Pendaftaran Kontraktor (LEVI)

Pendaftaran Kontraktor

Pendaftaran Personel Binaan

Pembangunan Kontraktor

Negeri

Perlis

Kedah

Pulau Pinang

Perak

Selangor

Kuala Lumpur

Melaka

Negeri Sembilan

Johor

UPP

5.9 Tekan **Update/Escalate Case** untuk mengemukakan escalation.

Escalation Cases

Next Action

Pengurusan Maklumat (IT)

Update/Escalate C