

National Stock Exchange of India

Circular

Department:	
Download Ref No:	Date: October 5, 2021
Circular Ref. No:	

To All Investors,

Sub: Introduction of dedicated web-based Help desk portal for Investors

In our continuous endeavor to deliver superior customer experience, Investor Services Cell is pleased to announce the introduction of dedicated web-based Helpdesk portal for Investors. Path for accessing the help desk portal - <https://nseindia.service-now.com/helpdesk>

The web-based Helpdesk portal is a robust self-service system aimed to deliver support for addressing queries pertaining to the functions handled by Investor Service Cell.

Important features of the Helpdesk portal are as follows:

1. Knowledge Portal – A wide range of articles and FAQs shall assist users in enhancing their product/process knowledge and thereby help in addressing their queries.
2. Raise a Request – Through the ‘Raise a Request’ quick link, a logged-in user has the option to directly create a ticket for query resolution rather than sending an email or calling the Regulatory helpdesk toll free numbers. Users can also provide updates/additional information to the service executive handling the said ticket. Further, the progress of the ticket can also be monitored until closure. User can also refer to historical tickets.

Furthermore, the new Chatbot available on the portal shall also serve as an additional avenue to support in query resolution.



National Stock Exchange of India

Investors may kindly note that the new Helpdesk portal shall be live with effect from October 08, 2021. The detailed process manual is enclosed herewith for accessing the services available on the helpdesk portal.

From October 08, 2021 onwards, for any queries pertaining to the Helpdesk web portal or any other queries, investors can reach out to the helpdesk on toll free number 1800 2660 050 (IVR option 5).

Additionally, existing channels of communication through email ids defaultisc@nse.co.in (for defaulter claims) and jgnse@nse.co.in (for investors) shall continue to be available.

Accordingly, investors are requested to note that the tollfree no. 1800 266 0058 will be discontinued w.e.f. October 08, 2021.

**For and on behalf of
National Stock Exchange of India Limited**

**Dinaz Shroff
Chief Manager**



USER MANUAL

Helpdesk Portal

Objective:

This document enlists the step-by-step guide on how to use the Helpdesk Portal

Intended Users: INVESTORS

Document Owner: NSE





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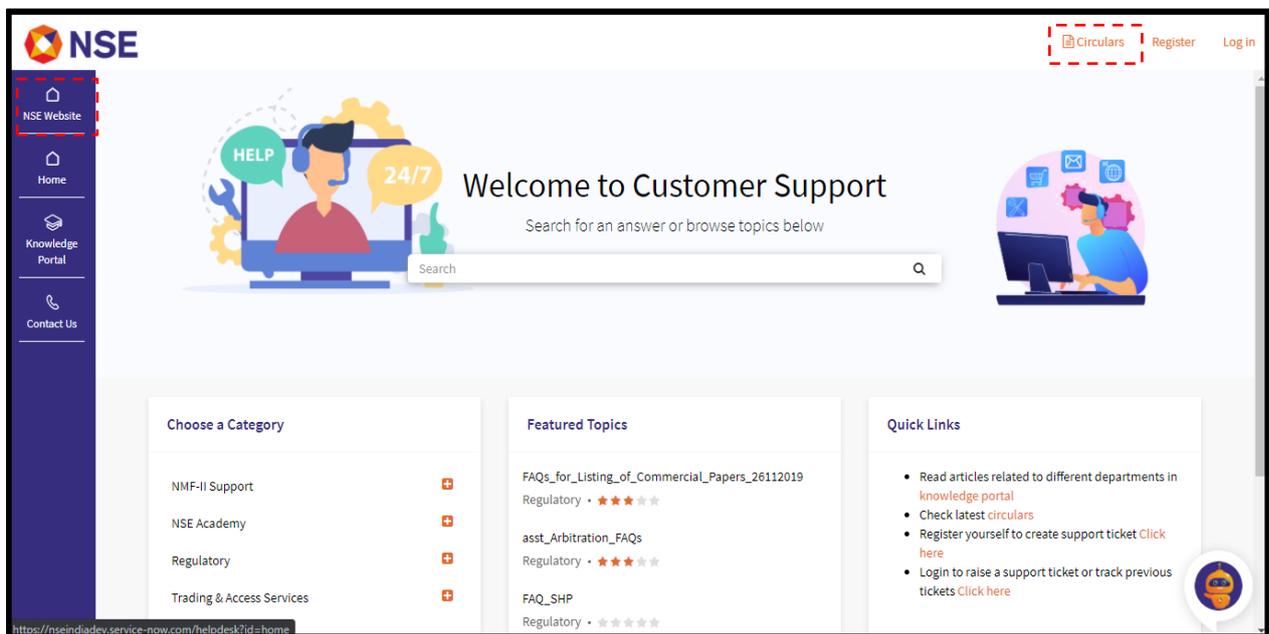
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1 Non-Logged in user view

1.1 Helpdesk Homepage

The initial Landing page of helpdesk looks like this

This is the helpdesk portal homepage accessible by Investors that are redirected using URL: <https://nseindia.service-now.com/helpdesk>
They are greeted with this page if they are not logged in.

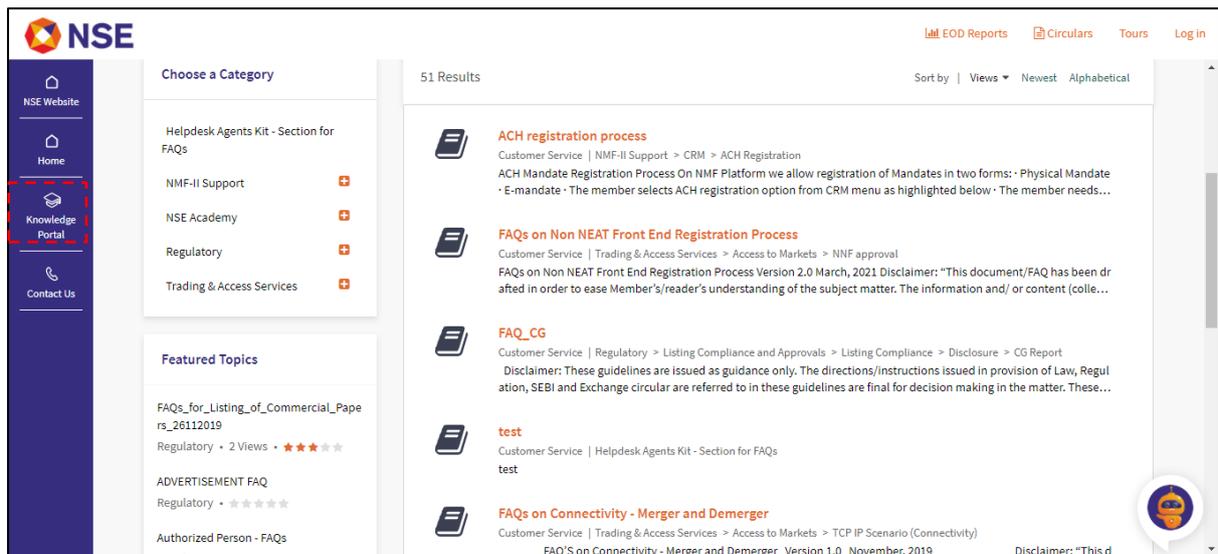


Note:

Users can visit the NSE official website and the Circulars website using the highlighted buttons in the screenshot above.

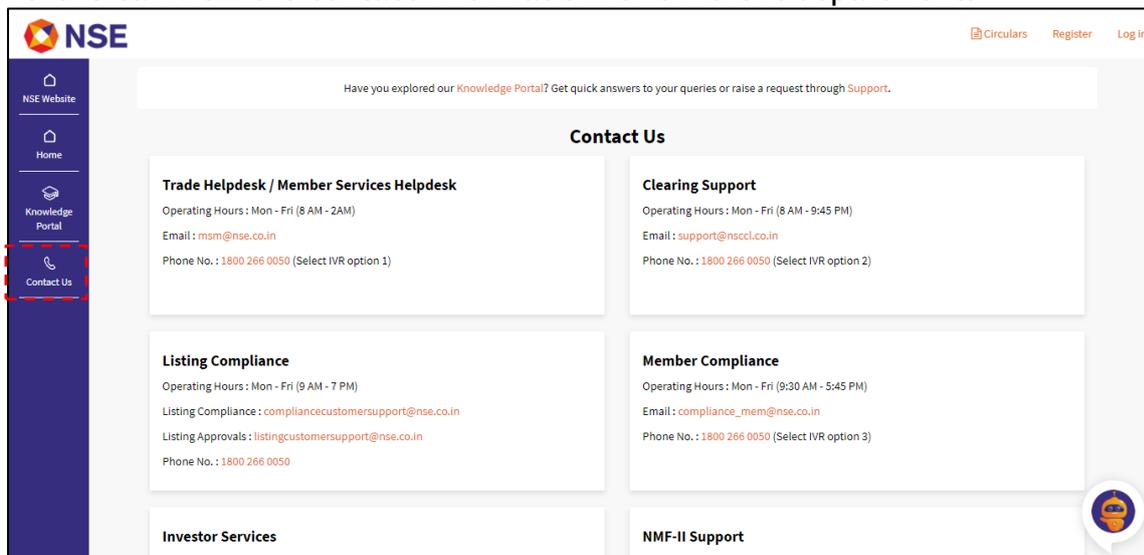
1.2 Knowledge Portal

On clicking the knowledge portal button, user is redirected to the knowledge portal, where user can browse all knowledge articles or as per the users' query. The user can also search knowledge articles using the search bar at the center of the portal.



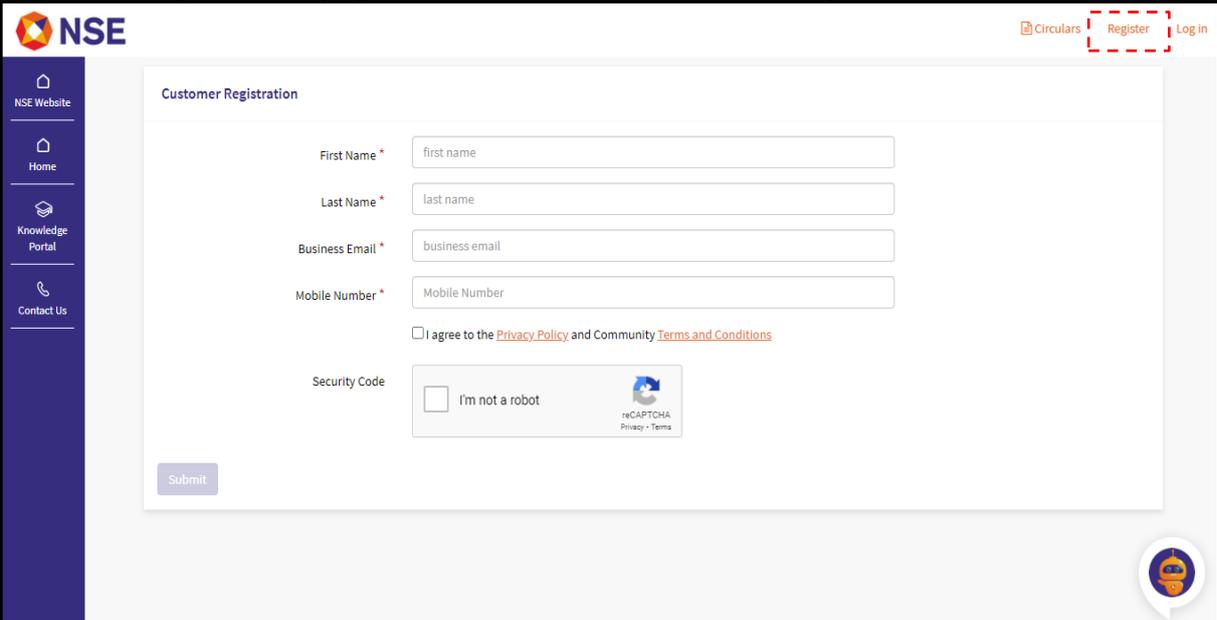
1.3 NSE Contact Us Page

On clicking the 'Contact Us' button, the user will redirect to the page where he/she can view the contact information for different departments



1.4 NSE Register Page

On clicking the Register button in the top right, the user is redirected to the customer registration page, where he/she can fill the required details

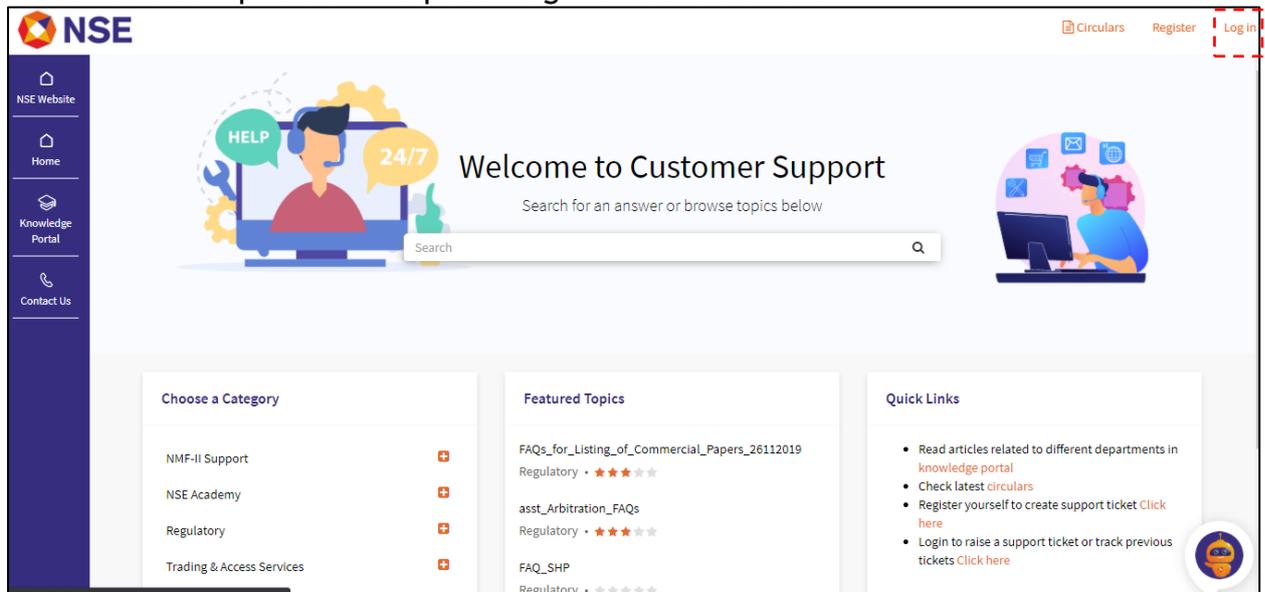


Note:

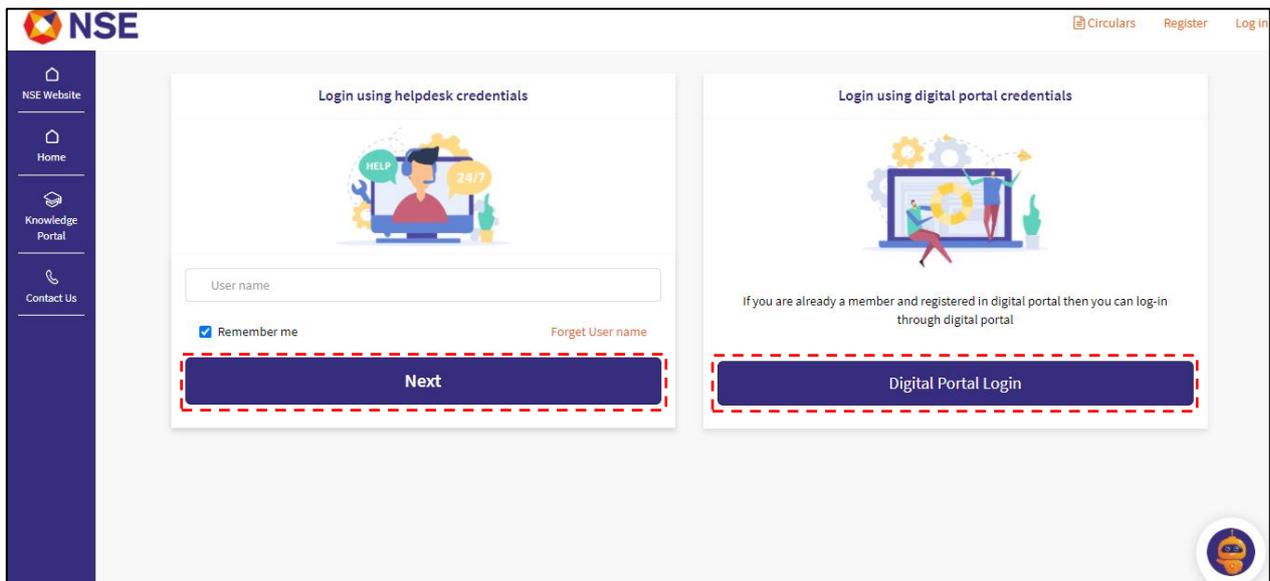
- **Steps to Register:**
 - Step 1:** Enter details in all mandatory fields.
 - Step 2:** Click on Security Code to verify captcha.
 - Step 3:** Click on submit button.
 - Step 4:** User receives credentials in his/her registered email address.
 - Step 5:** User enters the credentials to login to the portal.
 - Step 6:** Portal will ask to change password for users logging in for the first time.
- After submission, the user is redirected to the homepage.

1.5 Helpdesk Login Page

On clicking on the Login button in the top right corner, the users land on this page. Users need to input their Helpdesk login credentials here.



On the top right we have a log in button. On clicking the log in button, the user is directed to the login page where he/she can use the helpdesk credentials to login.



- Users having helpdesk credentials can enter username and click on 'Next' button to enter OTP and Password.

Note: Please note that the said login option is only for Investors

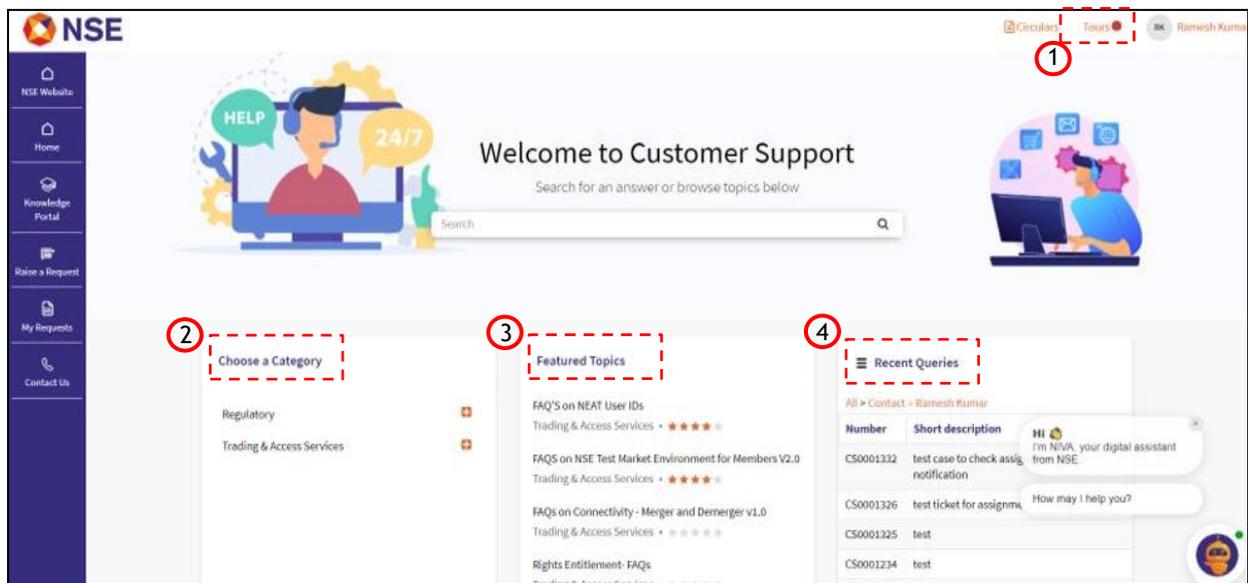
- Users having NSE Digital Portal (<https://digitalexchange.nseindia.com>) credentials can click on ‘NSE Digital Portal (<https://digitalexchange.nseindia.com>) Login’ button and will be redirected to NSE Digital Portal (<https://digitalexchange.nseindia.com>) to enter their credentials.

Note: Please note that Digital Portal login option is not applicable for Investors

2 Logged in User View

2.1 Helpdesk Homepage

This is the NSE Helpdesk portal homepage for logged-in Investors who are logged-in on Helpdesk Portal (<https://nseindia.service-now.com/helpdesk>) using their existing Helpdesk Portal credentials.



Investor can browse articles based on a category, see the featured topics, view his recent cases, or search an article using the search bar.

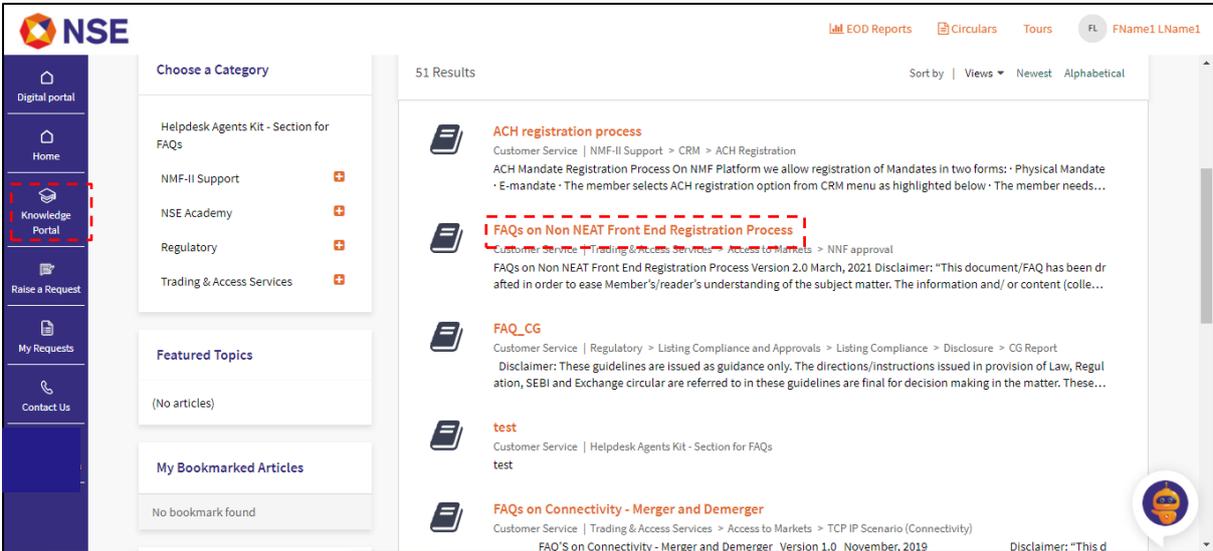
Below mentioned are the description of highlighted sections on above Homepage screenshot:

1. User can click on ‘Tours’ button which is step by step guide to help user onboarding within Helpdesk Portal

2. 'Choose a Category' section displays Knowledge category to help search relevant articles as per user's query
3. 'Featured Topics' Section displays most viewed FAQs and topics of the department to which the user belongs.
4. 'Recent Queries' section displays list of recently created cases for the user.

2.2 Knowledge Portal

2.2.1 The users can navigate to knowledge portal and see their bookmarked articles and search history



The screenshot shows the NSE Knowledge Portal interface. On the left, a vertical navigation menu includes 'Digital portal', 'Home', 'Knowledge Portal' (highlighted with a red dashed box), 'Raise a Request', 'My Requests', and 'Contact Us'. The main content area is titled 'Choose a Category' and lists several categories: 'Helpdesk Agents Kit - Section for FAQs', 'NMF-II Support', 'NSE Academy', 'Regulatory', and 'Trading & Access Services'. Below this, there are sections for 'Featured Topics' (showing '(No articles)') and 'My Bookmarked Articles' (showing 'No bookmark found'). The search results section shows '51 Results' and lists several articles with their titles and brief descriptions. The article 'FAQs on Non NEAT Front End Registration Process' is highlighted with a red dashed box. The footer of the page includes a disclaimer: 'Disclaimer: "This d'.

Note:

- Investor can also read an article by searching or by choosing a category.

2.2.2 Investor can view the document by clicking on the article name. They also see options for bookmarking, downloading, rating, and commenting on the article.



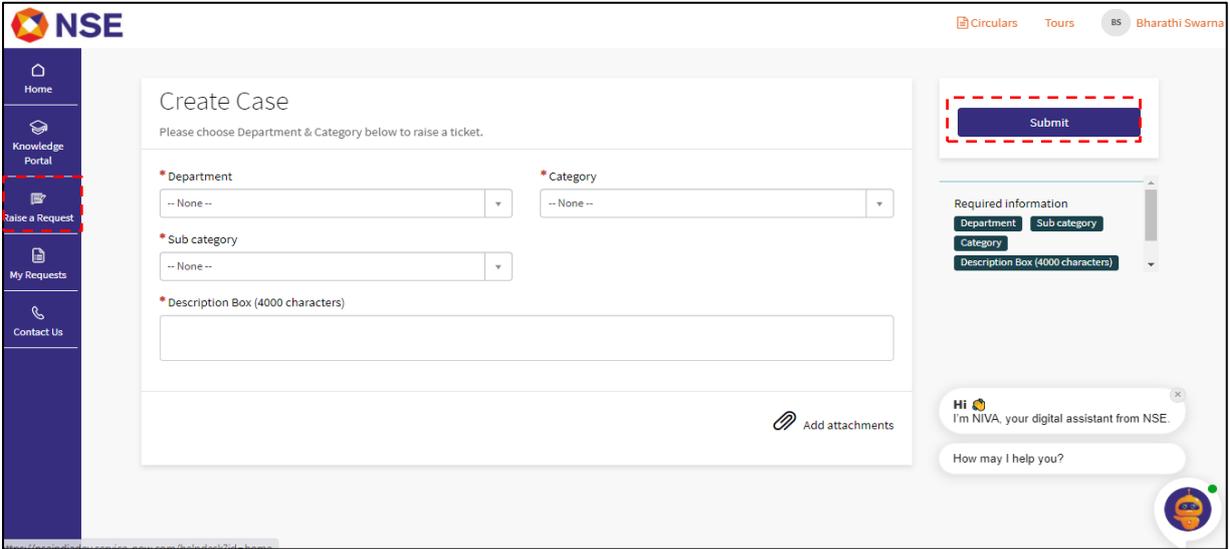
Note:

- Additionally, users can also mark the article as helpful.

2.3 Create a New Case from Helpdesk Portal

A logged-in investor can create a case through the Raise a Request quick link on the left dashboard.

User can fill the required information in the mandatory fields (department, category, sub-category and description), add attachments if needed and submit the form using the submit button on the top-right. User clicks on Submit button and case gets created on portal for selected query



NSE Circulars Tours BS Bharathi Swarna

Create Case

Please choose Department & Category below to raise a ticket.

* Department: -- None -- * Category: -- None --

* Sub category: -- None --

* Description Box (4000 characters)

Submit

Required information

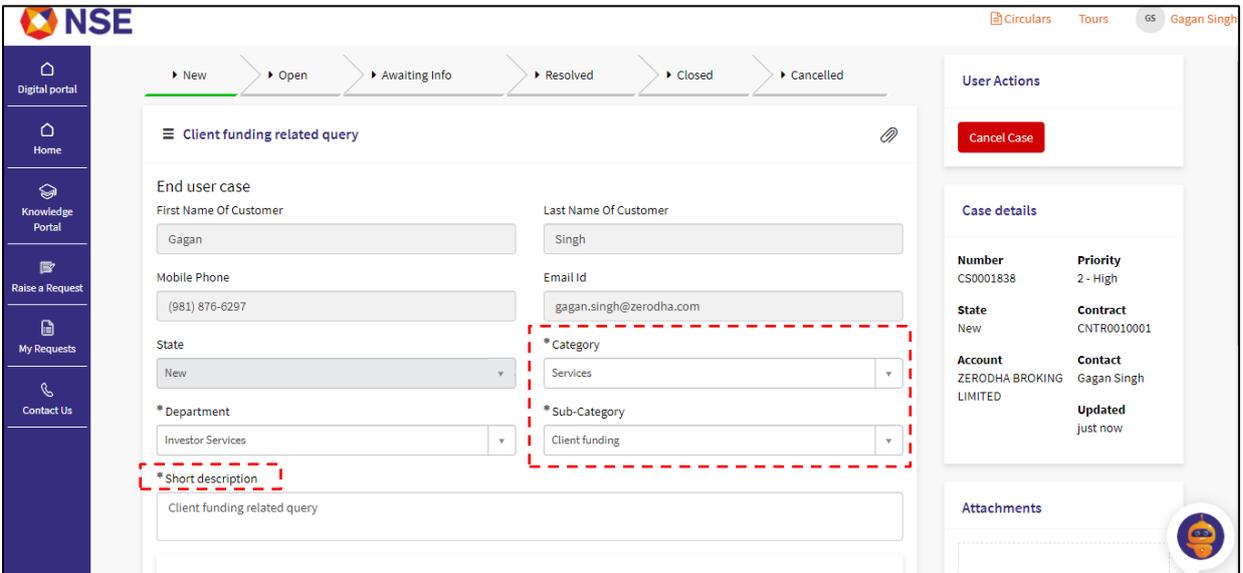
- Department
- Sub category
- Category
- Description Box (4000 characters)

Hi I'm NIVA, your digital assistant from NSE. How may I help you?

Note: Investors can only create case for Investor Services Department

2.4 Editing a New Case from Helpdesk Portal

After creating a new case, investor can edit some of the details before the case is assigned to an agent and is opened.



NSE Circulars Tours GS Gagan Singh

New > Open > Awaiting Info > Resolved > Closed > Cancelled

Client funding related query

End user case

First Name Of Customer: Gagan Last Name Of Customer: Singh

Mobile Phone: (981) 876-6297 Email Id: gagan.singh@zerodha.com

State: New

* Department: Investor Services

* Category: Services

* Sub-Category: Client funding

* Short description: Client funding related query

User Actions: Cancel Case

Case details

Number CS0001838	Priority 2 - High
State New	Contract CNTR0010001
Account ZERODHA BROKING LIMITED	Contact Gagan Singh
	Updated just now

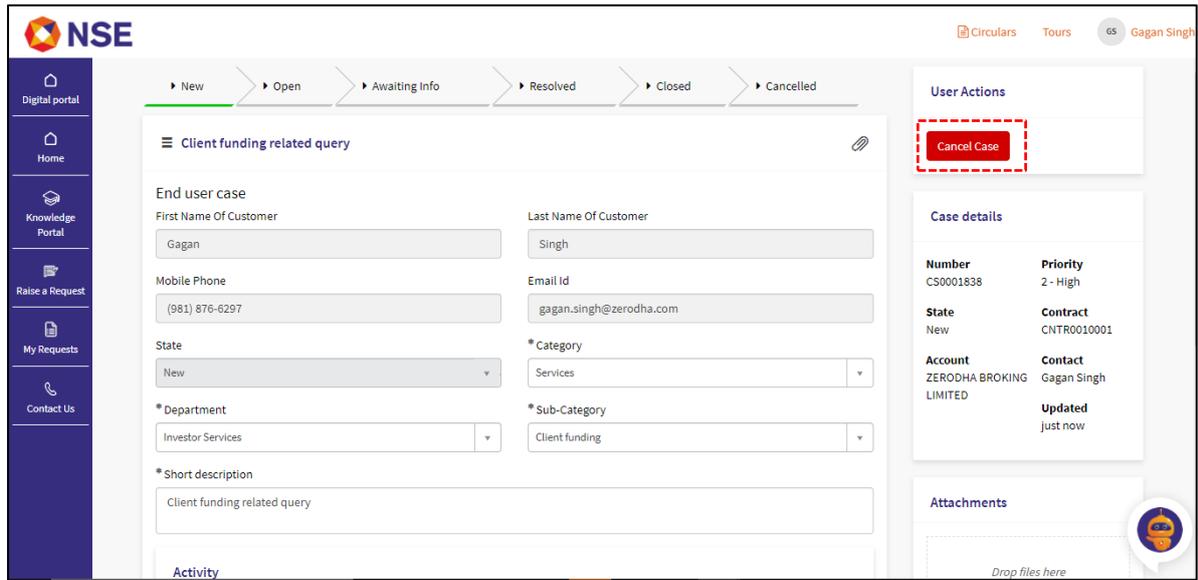
Attachments

Note:

- User can modify the category, sub-category and short description fields only when the case is in **New state**.

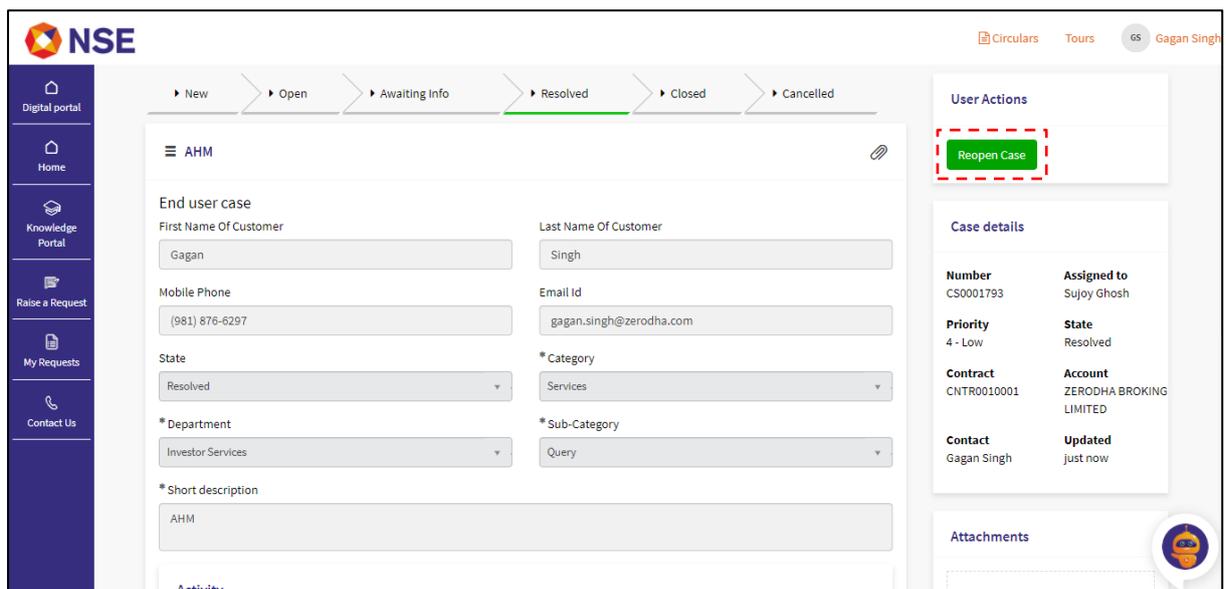
2.5 Cancelling a new case in Helpdesk Portal

User can open the new case and delete it using the ‘Cancel Case’ button. This functionality is only available when the case is in **NEW** state.



2.6 Re-Open a Resolved case in Helpdesk Portal

User can open the Resolved case using the ‘Re-Open Case’ button. This functionality is only available when the case is in **Resolved** state.

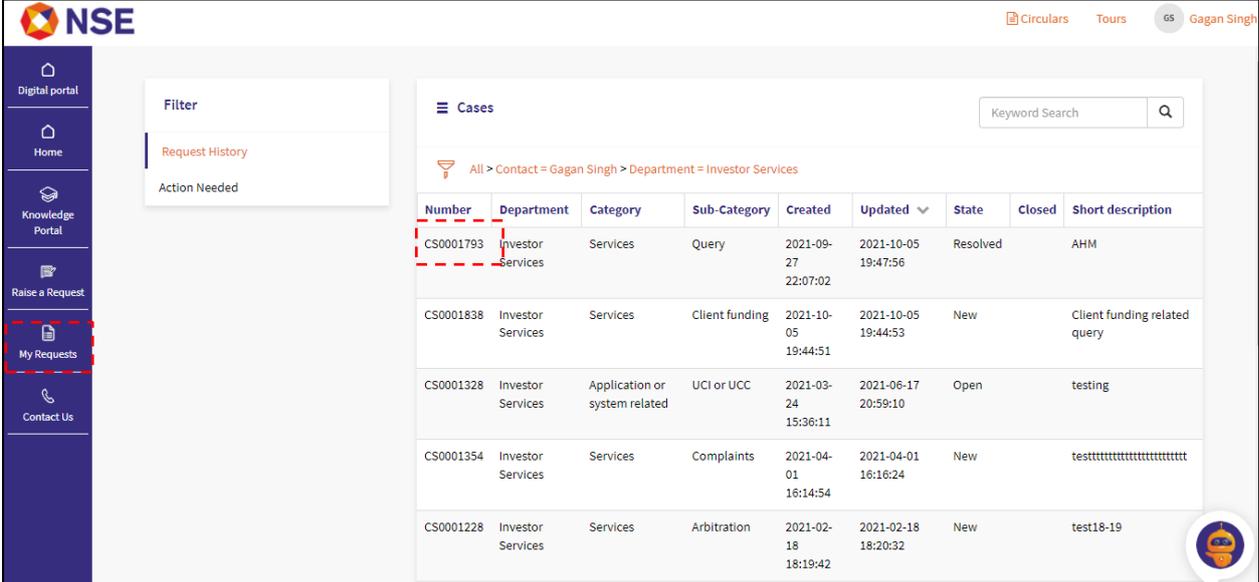


Note:

- Once a case is resolved, it gets **CLOSED** after 3 working days. Closed case cannot be re-opened.

2.7 Viewing All Cases of Logged in Investor

A logged-in user can view all his cases in the ‘Request History’ section of ‘My Requests’ from the dashboard. To view a specific case, the user can click on the particular case number from the list.



The screenshot displays the NSE digital portal interface. On the left is a navigation sidebar with options: Digital portal, Home, Knowledge Portal, Raise a Request, My Requests (highlighted with a red dashed box), and Contact Us. The main content area shows a 'Cases' section with a breadcrumb trail: All > Contact = Gagan Singh > Department = Investor Services. Below this is a table of cases with the following data:

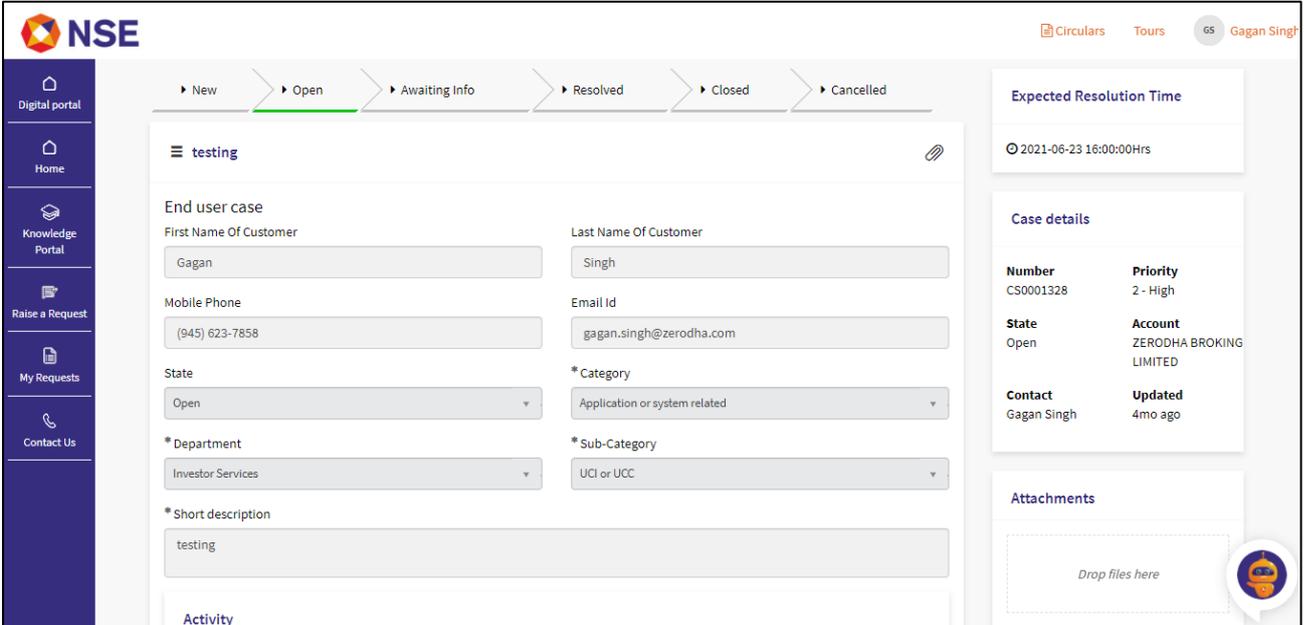
Number	Department	Category	Sub-Category	Created	Updated	State	Closed	Short description
CS0001793	Investor Services	Services	Query	2021-09-27 22:07:02	2021-10-05 19:47:56	Resolved		AHM
CS0001838	Investor Services	Services	Client funding	2021-10-05 19:44:51	2021-10-05 19:44:53	New		Client funding related query
CS0001328	Investor Services	Application or system related	UCI or UCC	2021-03-24 15:36:11	2021-06-17 20:59:10	Open		testing
CS0001354	Investor Services	Services	Complaints	2021-04-01 16:14:54	2021-04-01 16:16:24	New		testtttttttttttttttttttt
CS0001228	Investor Services	Services	Arbitration	2021-02-18 18:19:42	2021-02-18 18:20:32	New		test18-19

2.8 Viewing a Case

The user can view all the details and the current stage of the case by clicking on the case.

Investor can also add attachments using drag-and-drop.

All activities related to the case (including user comments) gets reflected in the Activity section. Few examples of activities include case created, additional information (for cases which are in Awaiting Info state and require customer input/comments), attachments and resolution notes (when agent resolves the case).



The screenshot displays the NSE digital portal interface for viewing a case. The top navigation bar includes the NSE logo, user profile 'Gagan Singh', and links for 'Circulars' and 'Tours'. A progress bar at the top shows the case stages: New, Open (highlighted), Awaiting Info, Resolved, Closed, and Cancelled.

The main content area is titled 'testing' and contains the following form fields:

- End user case:**
 - First Name Of Customer: Gagan
 - Last Name Of Customer: Singh
 - Mobile Phone: (945) 623-7858
 - Email Id: gagan.singh@zerodha.com
 - State: Open
 - * Category: Application or system related
 - * Department: Investor Services
 - * Sub-Category: UCI or UCC
 - * Short description: testing

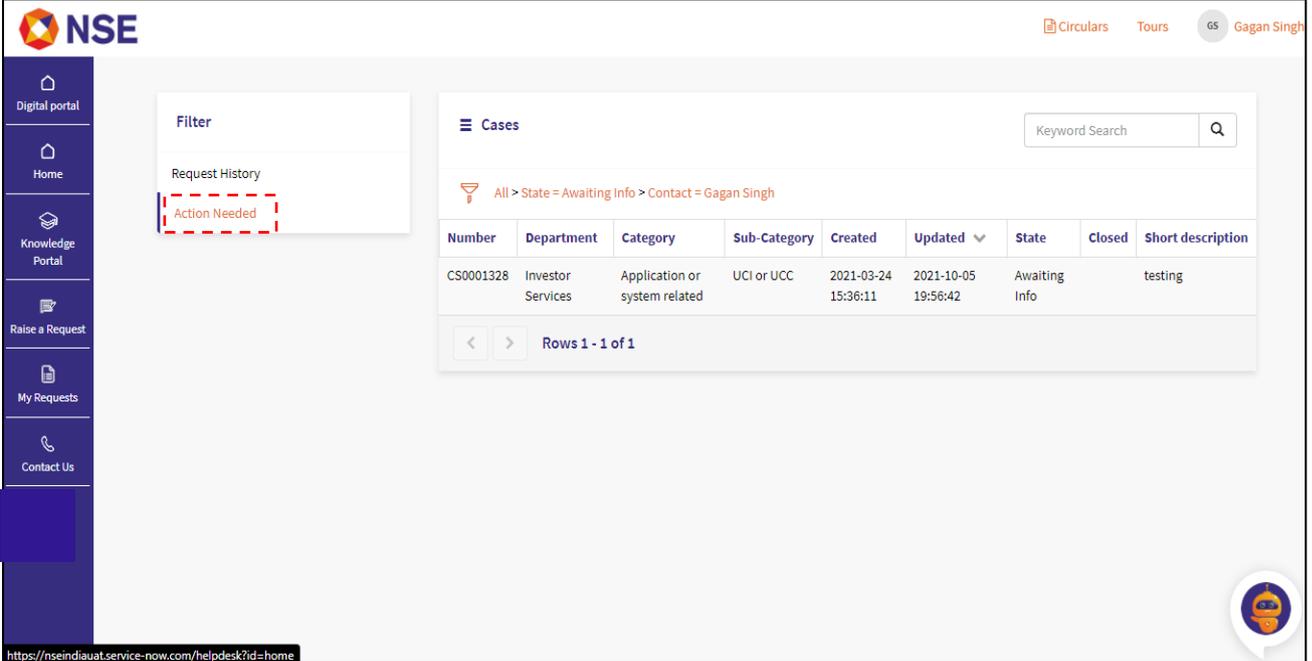
On the right side, there are several summary cards:

- Expected Resolution Time:** 2021-06-23 16:00:00Hrs
- Case details:**
 - Number: CS0001328
 - Priority: 2 - High
 - State: Open
 - Account: ZERODHA BROKING LIMITED
 - Contact: Gagan Singh
 - Updated: 4mo ago
- Attachments:** A drop zone with the text 'Drop files here' and a circular icon.

A vertical sidebar on the left contains navigation options: Digital portal, Home, Knowledge Portal, Raise a Request, My Requests, and Contact Us.

2.9 Action Needed Section

In the left pane user sees 'Action Needed' section where they see cases that need inputs from users for resolving



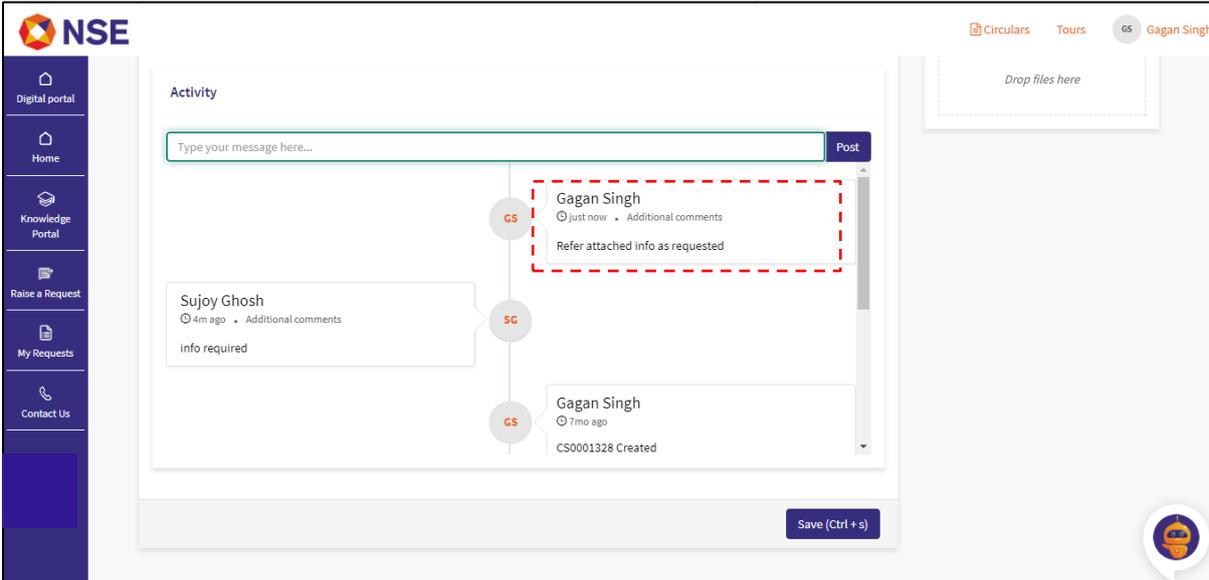
The screenshot shows the NSE digital portal interface. On the left sidebar, the 'Action Needed' section is highlighted with a red dashed box. The main content area displays a 'Cases' section with a search bar and a table of cases. The table has the following data:

Number	Department	Category	Sub-Category	Created	Updated	State	Closed	Short description
CS0001328	Investor Services	Application or system related	UCI or UCC	2021-03-24 15:36:11	2021-10-05 19:56:42	Awaiting Info		testing

Below the table, it shows 'Rows 1 - 1 of 1'. The breadcrumb trail at the top of the main content area reads: 'All > State = Awaiting Info > Contact = Gagan Singh'. The user's name 'Gagan Singh' is visible in the top right corner of the portal.

2.10 Viewing a Case Requiring Investor Action

On clicking a case in Action Needed section, the user can see all the details and they can post a comment which can facilitate the agent



The screenshot shows the NSE Digital Portal interface. On the left is a navigation menu with options: Digital portal, Home, Knowledge Portal, Raise a Request, My Requests, and Contact Us. The main content area is titled 'Activity' and features a text input field 'Type your message here...' with a 'Post' button. Below this, a vertical timeline shows activity: a comment from Sujoy Ghosh (4m ago) stating 'info required', followed by a comment from Gagan Singh (just now) stating 'Refer attached info as requested'. At the bottom of the activity, it says 'Gagan Singh 7mo ago CS0001328 Created'. A 'Save (Ctrl + s)' button is at the bottom right. On the right side of the page, there are links for 'Circulars', 'Tours', and 'Gagan Singh', along with a 'Drop files here' area.

Note:

- After writing the comment the user needs to submit using 'Post' button.
- The comment will get reflected in the Activity section.

3 NSE Chatbot

User can click on Chatbot Icon on bottom right of the screen to connect with AI powered NIVA chatbot to get answers to their queries.

Some features of NIVA Chatbot are as follows:

1. Interactive
2. Customer engagement
3. Dynamic search based on user type
4. Seamless Experience

