Customer Integrated Management Services (CIMS)

Customer on-boarding user manual  20-Dec-2019

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CUSTOMER INTEGRATED MANAGEMENT SERVICES

USER MANUAL

Customer On-Boarding
INDEX

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1 Introduction

The Odisha Mining Corporation (OMC) Limited introduces a customer-interface portal, coined as Customer Integrated Management Services (CIMS) for traders, plant owners and mineral based industries to streamline the business processes, bring synergy in functional activities, and expanding volumes. Currently, manual file processing is carried out for obtaining approval from the management. A long-drawn procedure in issuance of transit permit and manual verification from all higher authorities is followed. The integration of CIMS portal automates the entire process and helps the customer as well as administrator to make efficient use of time and money. The portal monitors and optimizes customer on-boarding and order processing to help them take an informed and timely decision.

OMC-customer integrated management service leaves no stone unturned, it facilitate a hassle-free customer experience with respect to quantity, quality and transparency in services.

1.1 Purpose

This document will help the users to understand the registration and on-boarding process of the new and existing customer. An applicant shall find a step-by-step guideline on how to register, fill the required inputs, view application request, submit documents, and much more. The document leaves no room for errors and misunderstandings while operation of the CIMS application at the user end.
1.2 Getting Started
To get started with the CIMS portal, enter the website link (provide the link here) in the browser. Applicants shall find a login page as shown in **Fig 1**.

![Figure 1 Home Screen](image)

In the landing screen shown above, there are three different options for user login.

- **Officer Login**: created to help the officers such as Headsale, Assistant General Manager, District General Manager or Managing Director to access application forms and take necessary action against it.
- **Existing Customer Login**: created for existing customers with CIMS to receive any update to the application.
- **New Customer Registration**: invites new applications.

2 New Customer Registration

For using the application, any trader or plant owner has to register them as a member of the system.
A member with CIMS has the authenticity to process orders, raise grievances, know status of the contract, and do a lot more. The purpose of the application is to manage sales, delivery and data sharing in real time basis.

2.1 Customer Registration Process
To begin with, select the “Customer Registration” icon as encircled in red in Figure 2.

![Figure 2 Home Screen (New Registration)](image)

On clicking the highlighted icon, applicants can do the registration for Long Term Linkage (LTL), National e-Auction or a Premium Customer.

a) National e-Auction – Customers with valid i3MS code can register in the category. The OMC sends newly registered customer request to MSTC Ltd. After successful bidding of the request sent, the MSTC Ltd sends the bidder information to the OMC. The new customers are then created in the SAP system.
b) **Long Term Linkage** – For registration of Long Term Linkage customers, an Expression of Interest (EOI) is published for long term linkage and State based end user (both new as well as existing customer). The details of LTL customer are fed in SAP system after due approval from the allotment committee of the government.

c) **Premium Customer** – Customers (New and existing) can be registered under this category at any point of time. The price of the concerned mines will be additional 5% of the highest bidder of the National e-Auction. The customer has to pay more than others before lifting the materials from the mines.

![Customer Integrated Management Service](image)

**Figure 3-** Home Screen (Application For)

Applications for three different types of customer registration should be done as indicated in the Fig 3.

**Note:** Registration for LTL, national e-auction and premium customers are almost the same. However, the onboarding process for LTL customers differs from the other two at various stages before and after the order processing. This will be discussed separately in this manual later on.
With reference to **Fig 4**, all the applicants have to fill the required date and validate their inputs in the application form.

On clicking, an application request appears where the user has to -

- Enter the valid i3MS code given by Department of Steel & Mines Odisha
- Enter valid mobile number and email ID.
- Click the “Validate” button and confirm.

For confirming the input, validation of data is essential as it helps in entering the applicant, unique i3MS code, mobile number and email ID in the CIMS database.
Doing so, the system will generate a one-time password for the user.

- Enter the OTP in application form
- Click the “Submit” button to confirm.

To understand better, refer the screen shared in Fig 5 and know how one can register an application using i3MS code, mobile number and e-mail ID in the CIMS portal.
Figure 6: Preview Screen (Registration)

**Note:** After successful completion of the application a confirmation page is created and temporary login credentials are sent to the mobile number or email ID. Log in to the account to add more details to the application form.

In Fig 6 shown above, clicking on the “PROCEED button will take the user to the CIMS dashboard.

### 3 CIMS Dashboard

With the successful completion of the registration process, users get access to a separate dashboard for evaluating order and stocks, get weekly dispatch report, and check order status, region wise total sale, grievance status and mineral wise dispatch history.

CIMS dashboard contains three different drop-downs in the left side for smooth Customer On-boarding, Order Processing and Grievance appraisal. Each of them is targeted to serve a special function and improve customer experiences, in an overall basis. Select from given categories takes applicant to next on-boarding process. Here is a screen (Fig 7) showing the general dashboard of CIMS page.
3.1 Customer On-Boarding

When an applicant is registered with CIMS, an individual or a company is completely eligible for making an order, raise any grievances, generate memorandum or take control of the order and stocks.

To do so, applicants has to provide all the customer details in the Registration form and Submit Document in support of the same. A View Status is there to help him or her gets an overview of the request or check progress report from time-to-time.
Click the icon as highlighted in red in the **Fig 8** to view respective drop-down for the category and select the option.

### 3.1.1 Registration Form

On clicking the customer on-boarding tab, all the applicants are compulsory to complete a registration form which requires details about the applicant type, house, street name, district and others.
Figure 9- Registration Form Screen

Refer Fig 9 to get an idea about the required filled in registration. Follow the steps mentioned below for successful registration -

- Click the “Registration” button. (indicated in Fig 8 above)
- Fill the required filled in the registration page.
- Provide details about the house or street name, city name, select country, state name, and district name.
- The form will automatically fetch information for applicant name, company name, customer category and more from the unique i3ms code submitted at the time of the initial registration process.
- Click "Next" when all the required filled are completed and ready for the next move.

Submit “Yes or No”, if any changes are meant to be needed before final confirmation of the application form.

3.1.2 Mandatory Document Submission

For a hassle-free on-boarding experience, the CIMS portal ask users to upload some necessary documents such as incorporation or Articles & Memorandum of Association (applicable for LTL applicant only), Partnership Deed, IBM Registration Certificate, CTO order or others in support of the applied registration request.
Attachment of documents provides proof of authenticity for the applicants. Documents uploaded are allowed for changes, or alterations if any. (Refer **Fig 10**)

![Mandatory Document Screen (Upload Files)](image)

**Figure 10- Mandatory Document Screen (Upload Files)**

In the screen shown above, there are different categories for uploading different documents. Applicants need to submit the mandatory ones, failing to which the authorities can reject the application form and the applicant has to re-apply for the same.

Do not forget to read the instructions mentioned in the header of the page properly, it will guide in avoiding any error while submission. If any changes are required or the user wants to add or remove any document, there is a refresh icon at left side of the page to reenter the documents. Tap the arrow button to go to the previous page.
Refer the above displayed figure and follow the guideline to upload here -

- Browse and select the files required for uploading.
- Click the “Action” button in the right to add the file in the pdf format only. To remove or re-upload a delete button is also added here.
- Upload additional document in the Other Document Section
- All the documents are mandatory.

Choose “Next” button after uploading all the documents in the page and move on to the preview page. The users can check status of the application in the “View Status” button of CIMS dashboard, separately.
After successful uploading of the verified documents, the CIMS will ask for further proceedings. If the answer is “yes” the user can step forward or go back to the previous page, as shown in Fig 12.

3.1.3 Mineral Details
To make the ordering process simple and easier, the CIMS application integrates a user-friendly interface where applicants can sent order request for large amount of minerals and ores to the OMC without any interference. Refer Fig 13 to view the mineral details page.
In the screen displayed above, applicants have to –

- Select mineral type from the list of options, such as iron ore, chromite, and bauxite
- Select the mineral grade for the type of mineral selected.
- Choose the mine location, from where the mineral should be extracted.
- Specify the quantity of mineral in metric ton to be needed.

After completing the required filled, click on the preview button as highlighted in red in Fig 14.
Doing so, the order detail summary is displayed wherein the user can take action against any orders, either remove or make addition by clicking the separate button in the left. Refer the screen shared below.

**Figure 14- Mineral Details (Preview) Screen**
In **Fig 15**, there are three separate options to change the application status. Choice of options for national e-auction and premium customer are similar, whereas for LTL the criteria are something different, which will be elaborated later in the manual. Selection of preview takes the user to the next screen.

### 3.1.4 Application Form Preview

On selecting the preview button from the highlighted section in **Fig 15**, the user is navigated to the following preview screen wherein profile, document and order details are summarized for final overview.
The user can now view his or her application request in the “View Status” button added to the customer on-boarding tag in the CIMS dashboard.

**Figure 16- Application Form Preview Screen**
After verifying all the details provided in the order form, users are allowed to “Submit” or request for cancellation. Refer the highlighted button in **Fig 17**. A system generated confirmation query will appear on the screen, shown in **Fig 18**.
Figure 18- Proceed with Order Screen

If answer selected is “yes” then the application will move next to the confirmation screen or else the request will drop-down to the previous status. The figure displayed above shows it all.
Once the confirmation is done, the applicant gets registered with the CIMS. A request number, as shown in Fig 19, is generated with reference to permanent login credentials and password sent to the registered email ID and mobile number of the user. Using that login ID and password applicants can sign in to the “Customer Login” page and view his or her request status from time-to-time.

Herein, the application is sent for approval to the higher authorities like Headsale, District Magistrate, General Manager, Assistant General Manager and finally to the Managing Director for issuance of permit from the OMC department of Odisha State Government.

4 Registration Request for Long Term Linkage (LTL) Customer

As already mentioned in Customer On-Boarding section above, the registration request for Long Term Linkage Customers are slightly different from the National e-auction and Premium Customers. Most of the LTL customers are mineral based industries or plant owners, the users are requested to submit the plant details along with application form while requesting for a registration with OMC.
4.1 **Long Term Linkage Mineral Details Form**

Provide all the details of the minerals required to the mineral details page, as show in **Fig 20**. Herein, there are options to add or remove minerals, mines, mineral grade and quantity required in metric ton for LTL customers.

**Figure 20-** Mineral Details Screen (Long Term Linkage)

In the screen displayed above, the LTL customers can select the highlighted option and choose to move next.
4.2 LTL Details

All the Long Term Linkage customers are required to feed the plant details in the page shown below, if they own a mine or plant in the location.

![LTL Details Screen](image)

**Figure 21- LTL Details Screen**

On clicking the “For LTL” icon (as shown in Fig 20), customers (new or existing) will get a “Plant Details” page (shown in Fig 21) where the applicant needs to provide details about the type of plant (selected from the drop-downs provided in the side) and plant capacity as per CTD. Click the (+) icon if more than one plant details are required to be added. Choose the Preview button once all mandatory filled are completed. Or, select the previous button if any changes are meant to be made in the application form.
4.3 Application Preview (LTL Customers)

To review and update the application request customers are provided with an application preview page, where necessary changes can be made clicking the “Action Button” in the upper left corner of the dashboard.

Figure 22- LTL Submit Screen

Users are free to “Submit” or “Cancel” the request if any changes are right to be needed in the application process, refer Fig 22 above. Otherwise, the registration request is fit to go for the generation of a confirmation page.
4.4 Registration Confirmation (LTL Customers)

A confirmation page is generated for Long Term Linkage customer after successful completion of the registration request.

![Figure 23 - LTL Registration Confirmation Screen](image)

As shown in Fig 23, a request number is generated against the application request of the customers along with permanent login credentials to the registered email ID. Once the application is sent for approval, the registered user can view application status logging in the customer login page with verified credentials.
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