



USER MANUAL

Helpdesk Portal

Objective:

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

Document Owner: NSE



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1 Type of Users

1.1 Logged-in Users:

Logged in user is NSE Digital Portal (<https://digitalexchange.nseindia.com>) registered user i.e. user is having existing credentials in NSE Digital Portal (<https://digitalexchange.nseindia.com>). When logged in user is on NSE Digital Portal (<https://digitalexchange.nseindia.com>) page and clicks on Helpdesk button, he will be redirected to helpdesk portal as a logged-in users.

1.2 Non-Logged in Users:

Non-logged in users are those whose credentials are not created on NSE Digital Portal (<https://digitalexchange.nseindia.com>). When user is on NSE Digital Portal (<https://digitalexchange.nseindia.com>) pre login page & clicks on Helpdesk button, user will be redirected to helpdesk portal as a non-logged in user.

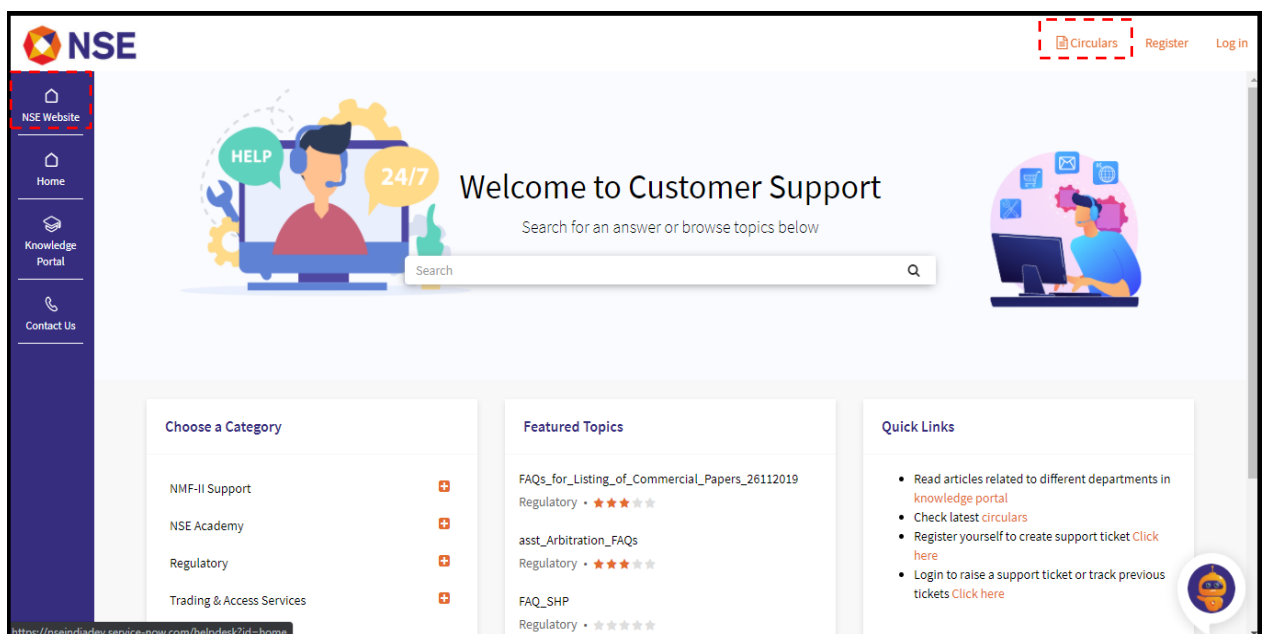
Note: Non-logged in users also include those users who do not have Helpdesk credentials.

2 Non-Logged in user view

2.1 Helpdesk Homepage

The initial Landing page of helpdesk looks like this

This is the helpdesk portal homepage accessible by members/users that are redirected from NSE Digital pre-login page. They are greeted with this page if they are not logged in.

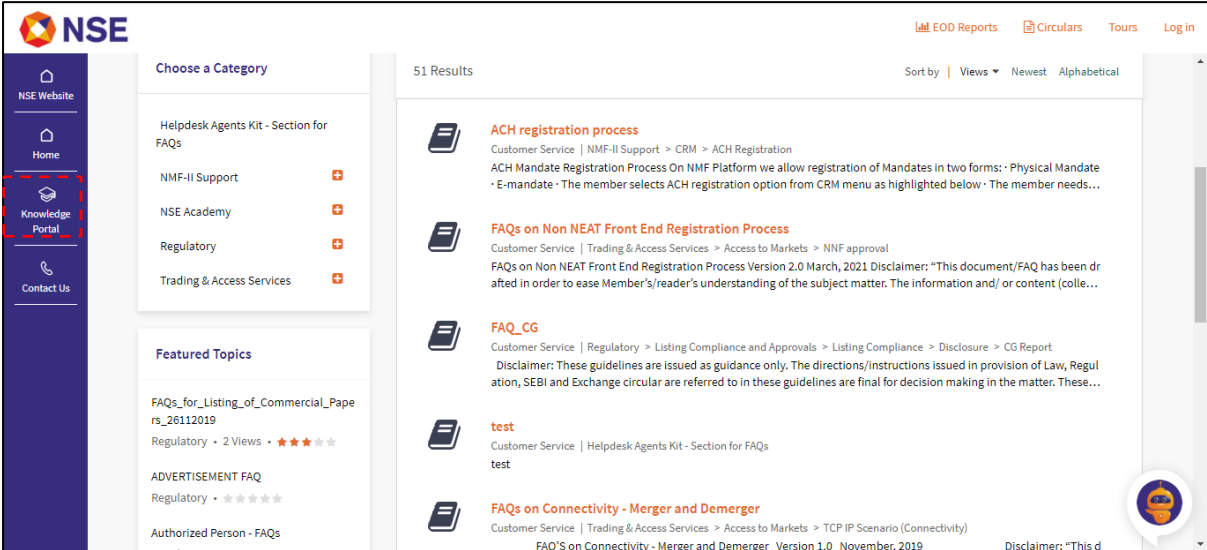


Note:

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

2.2 Knowledge Portal

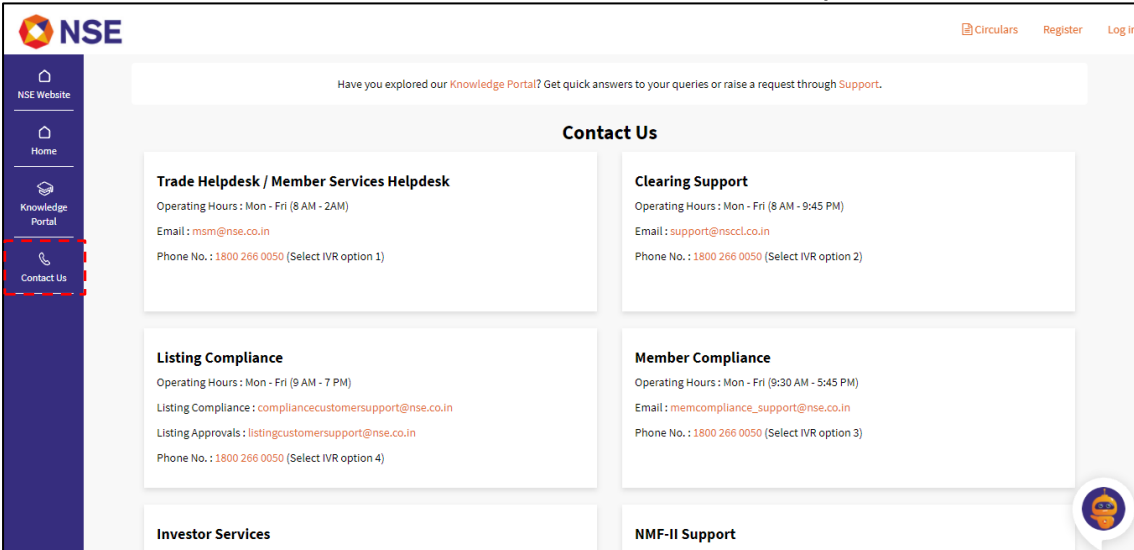
On clicking the knowledge portal button, user is redirected to the knowledge portal, where user can browse all knowledge articles or as per the users' query. The user can also search knowledge articles using the search bar at the center of the portal.



The screenshot shows the NSE Knowledge Portal interface. On the left, a vertical navigation menu includes 'NSE Website', 'Home', 'Knowledge Portal' (highlighted with a red dashed box), 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 'Featured Topics' including 'FAQs_for_Listing_of_Commercial_Papers_26112019', 'ADVERTISEMENT FAQ', and 'Authorized Person - FAQs'. The right side of the page displays '51 Results' and a list of articles, including 'ACH registration process', 'FAQs on Non NEAT Front End Registration Process', 'FAQ_CG', 'test', and 'FAQs on Connectivity - Merger and Demerger'. Each article has a brief description and a 'test' button.

2.3 NSE Contact Us Page

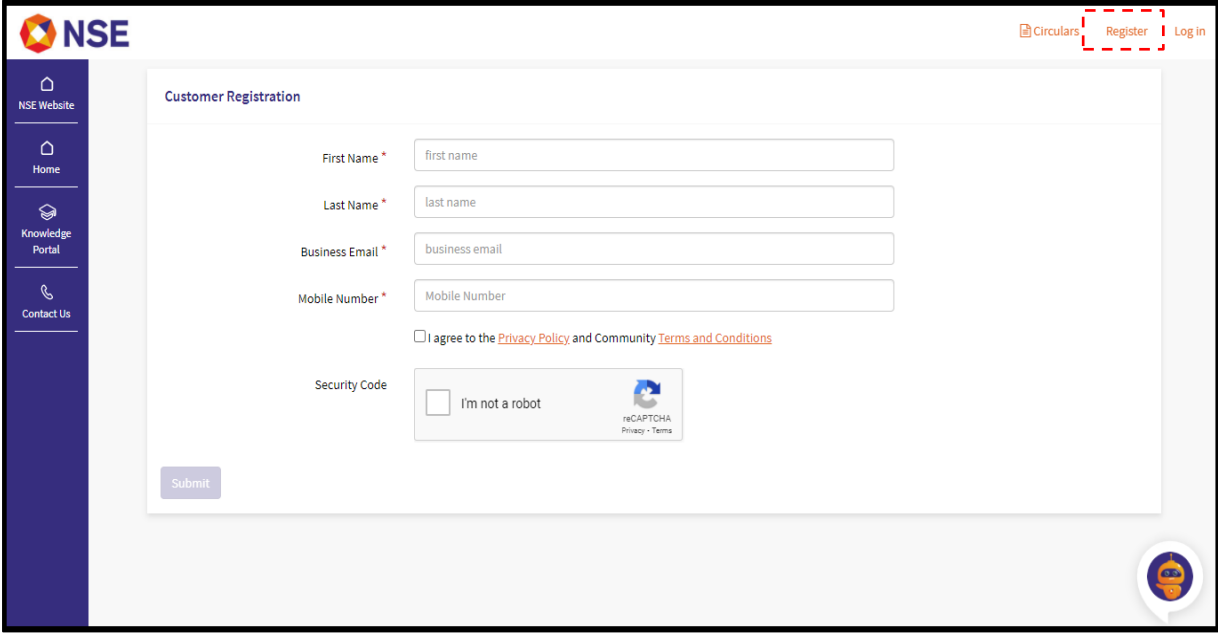
On clicking the 'Contact Us' button, the user will redirect to the page where he/she can view the contact information for different departments



The screenshot shows the NSE Contact Us page. The left navigation menu is the same as in the previous screenshot, with 'Contact Us' highlighted. The main content area is titled 'Contact Us' and contains a message: 'Have you explored our Knowledge Portal? Get quick answers to your queries or raise a request through Support.' Below this, there are five contact information boxes: 'Trade Helpdesk / Member Services Helpdesk', 'Clearing Support', 'Listing Compliance', 'Member Compliance', and 'Investor Services'. Each box provides operating hours, email addresses, and phone numbers. The 'Investor Services' box is partially visible at the bottom.

2.4 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

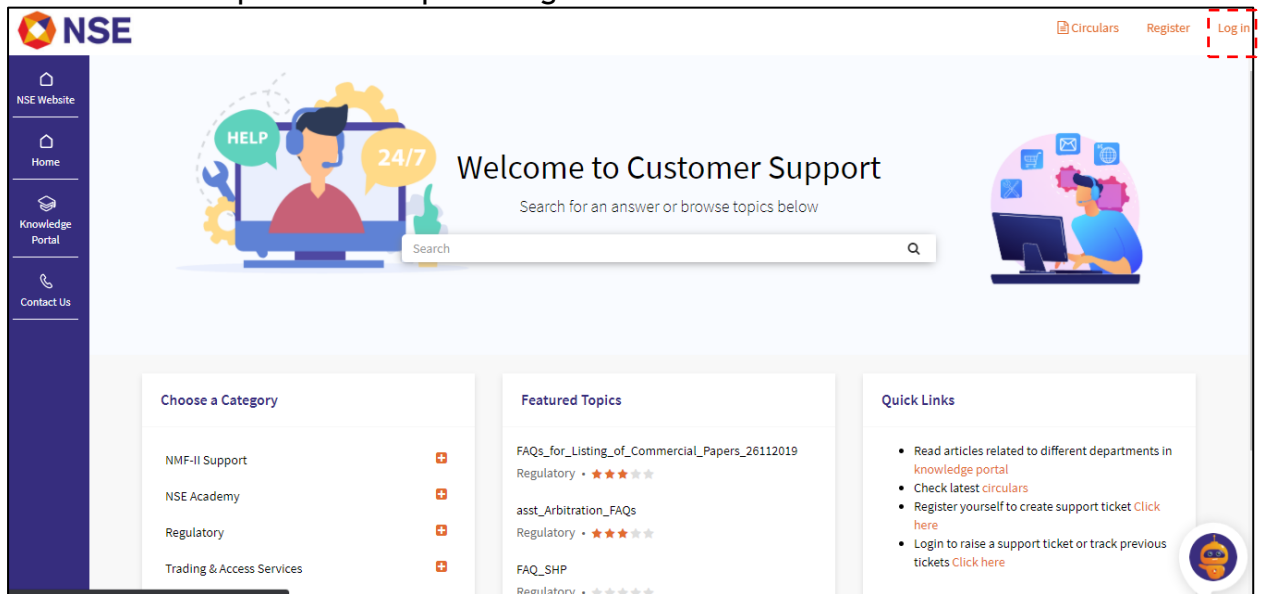


Note:

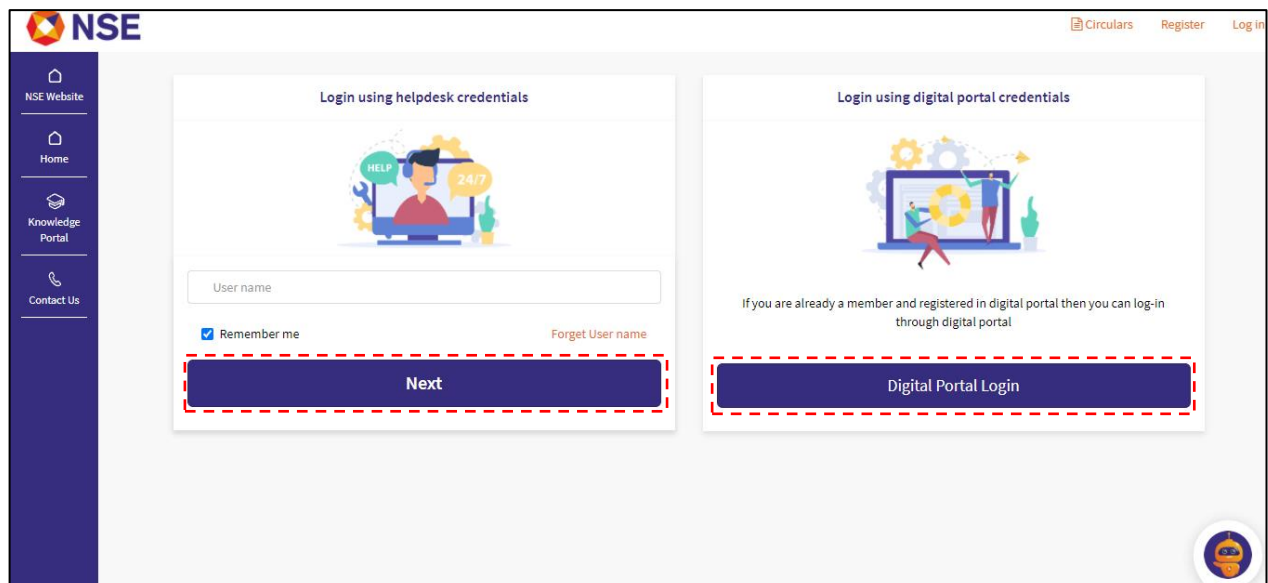
- **Steps to Register:**
 - Step 1:** Enter details in all mandatory fields.
 - Step 2:** Click on Security Code to verify captcha.
 - Step 3:** Click on submit button.
 - Step 4:** User receives credentials in his/her registered email address.
 - Step 5:** User enters the credentials to login to the 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.

2.5 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.

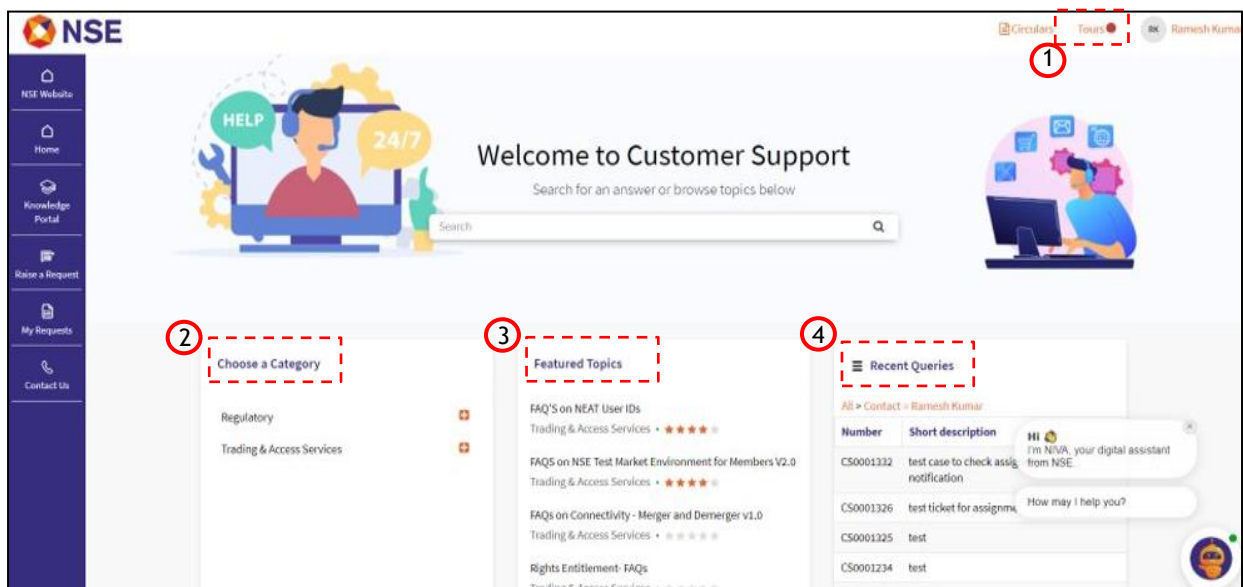
Note: Please note that the said login option is only for Investors

- 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.

3 Logged in User View

3.1 Helpdesk Homepage

This is the NSE Helpdesk portal homepage for logged-in members who are directed, while logged-in, from NSE Digital Portal (<https://digitalexchange.nseindia.com>).



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

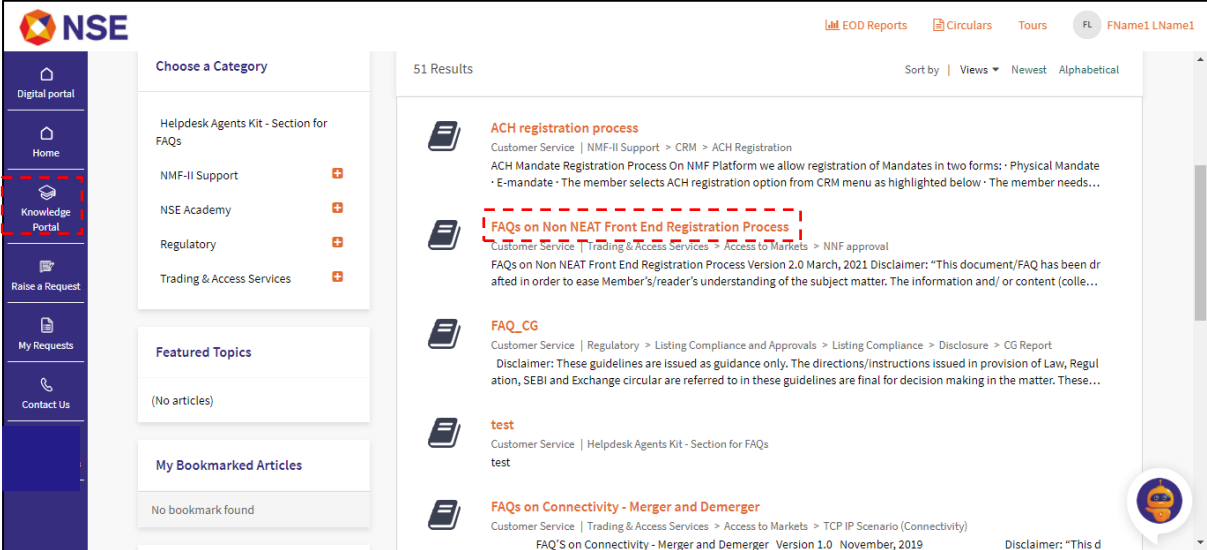
Below mentioned are the description of highlighted sections on above Homepage screenshot:

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.

3.2 Knowledge Portal

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

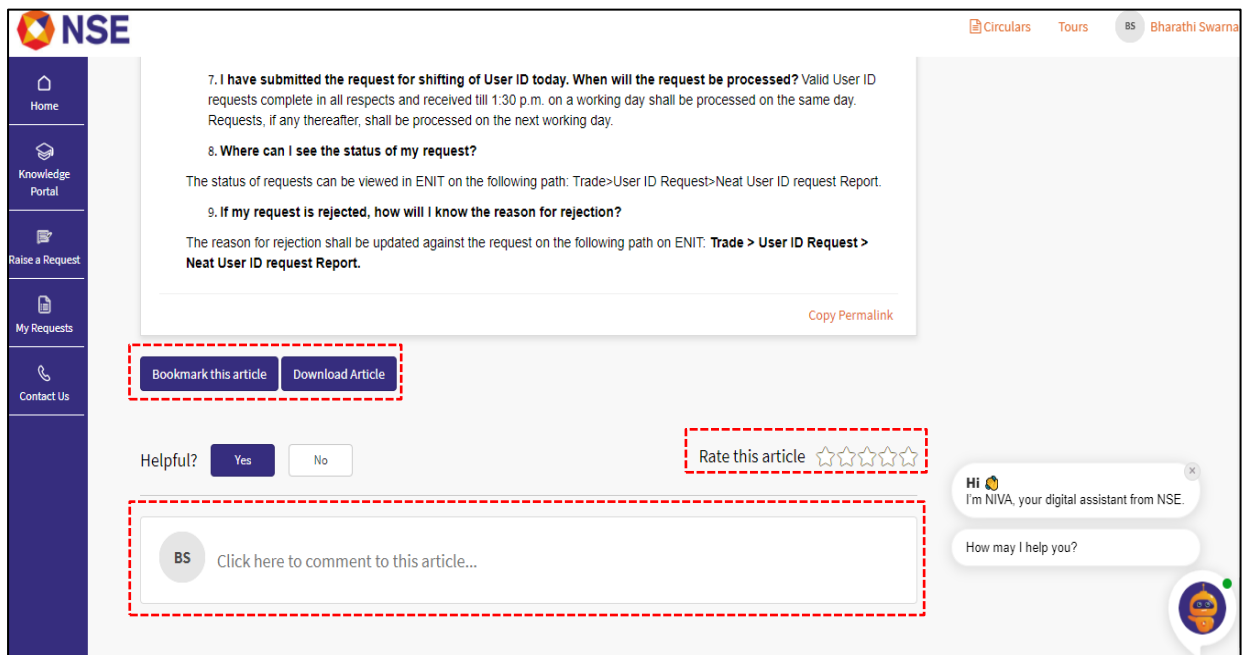


The screenshot displays the NSE Knowledge Portal interface. On the left, a vertical sidebar contains navigation links: 'Digital portal', 'Home', 'Knowledge Portal' (which is highlighted with a red dashed box), 'Raise a Request', 'My Requests', and 'Contact Us'. The main content area is titled 'Choose a Category' and shows a list of 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 right side of the interface displays search results for '51 Results'. The results list includes several articles, with 'FAQs on Non NEAT Front End Registration Process' highlighted by a red dashed box. Other visible results include 'ACH registration process', 'FAQ_CG', 'test', and 'FAQs on Connectivity - Merger and Demerger'. Each result includes a brief description and a path to the full article.

Note:

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

- 3.2.2 The member can view the document by clicking on the article name. They also see options for bookmarking, downloading, rating, and commenting on the article



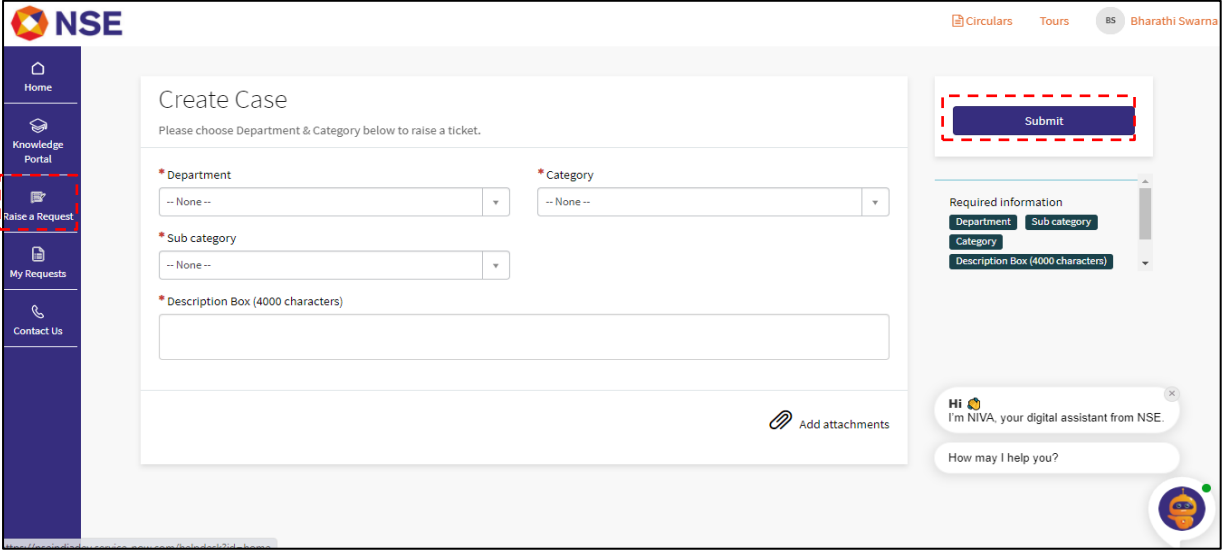
Note:

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

3.3 Create a New Case from Helpdesk Portal

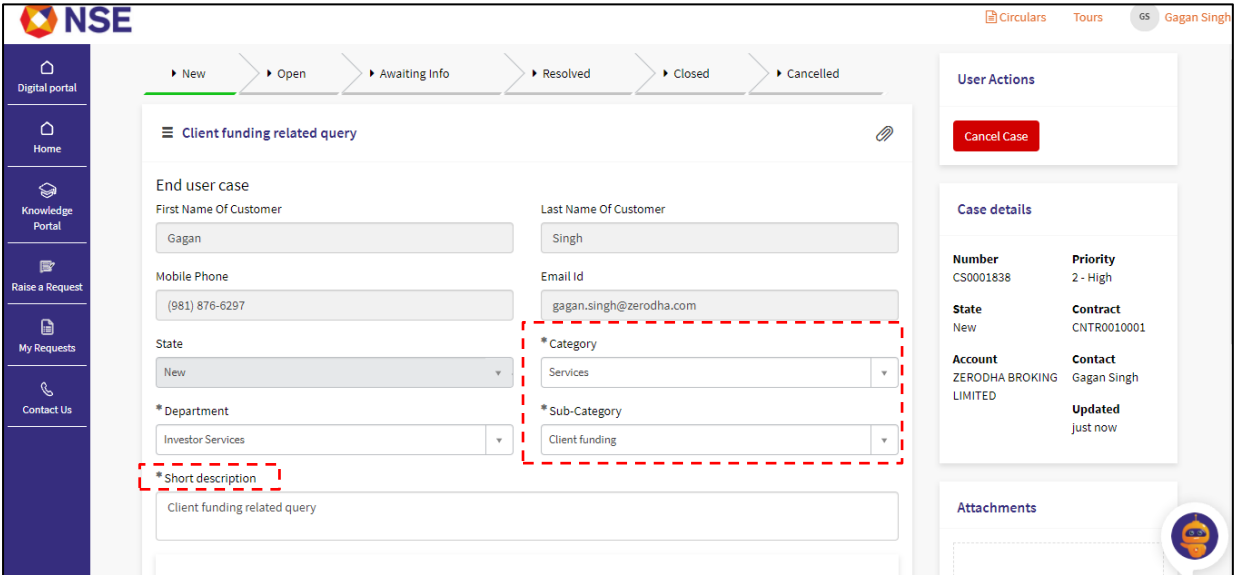
A logged-in member can create a case through the Raise a Request quick link on the left dashboard.

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



3.4 Editing a New Case from Helpdesk Portal

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

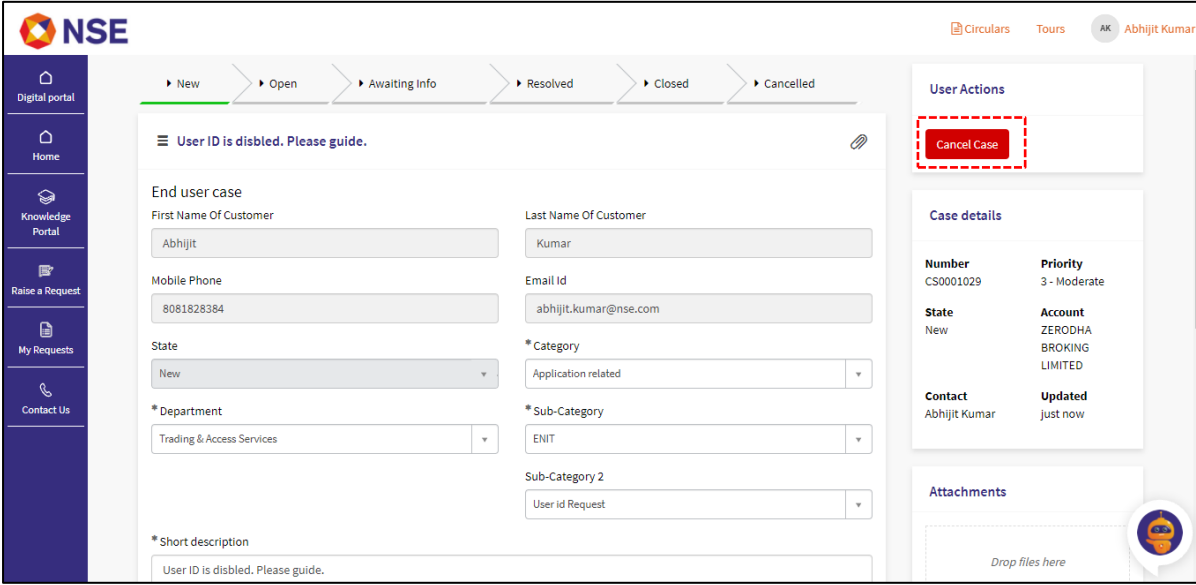


Note:

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

3.5 Cancelling a new case in Helpdesk Portal

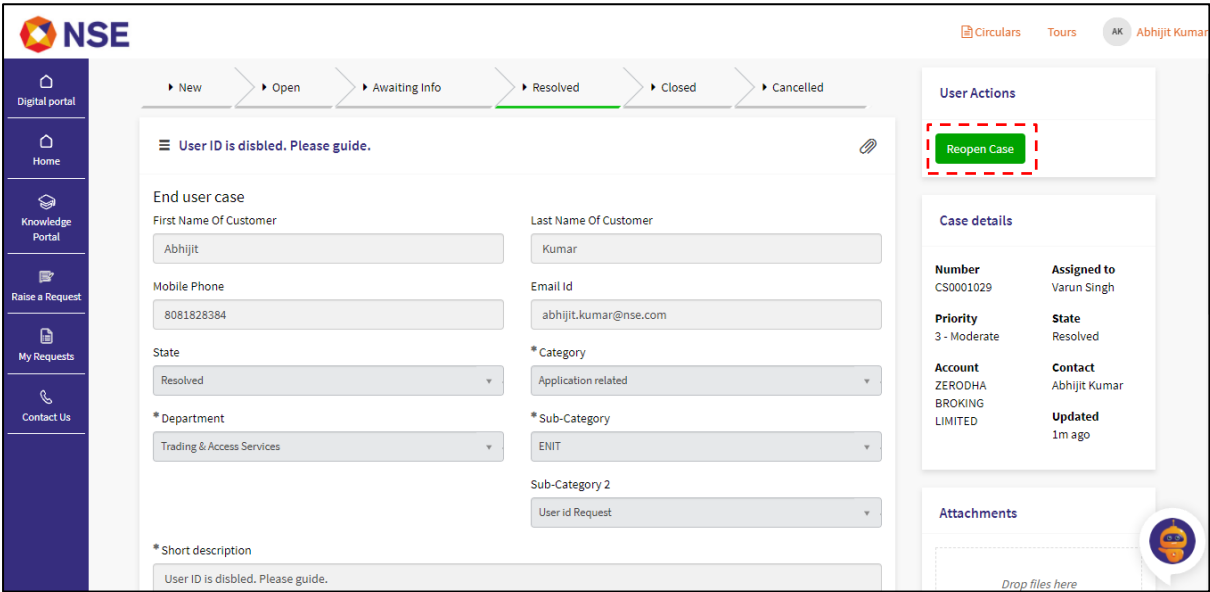
User can open the new case and delete it using the ‘Cancel Case’ button. This functionality is only available when the case is in **NEW** state.



The screenshot shows the NSE Helpdesk Portal interface. The top navigation bar includes the NSE logo, user profile (Abhijit Kumar), and links to Circulars and Tours. The left sidebar contains links to Digital portal, Home, Knowledge Portal, Raise a Request, My Requests, and Contact Us. The main content area displays a case in the 'New' state. The case details form includes fields for First Name Of Customer (Abhijit), Last Name Of Customer (Kumar), Mobile Phone (8081828384), Email Id (abhijit.kumar@nse.com), State (New), Category (Application related), Department (Trading & Access Services), Sub-Category (ENIT), and Sub-Category 2 (User id Request). A 'Cancel Case' button is highlighted with a red dashed box in the 'User Actions' section. The 'Case details' section shows the case number (CS0001029), priority (3 - Moderate), state (New), account (ZERODHA BROKING LIMITED), contact (Abhijit Kumar), and updated time (just now). The 'Attachments' section has a 'Drop files here' prompt.

3.6 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.



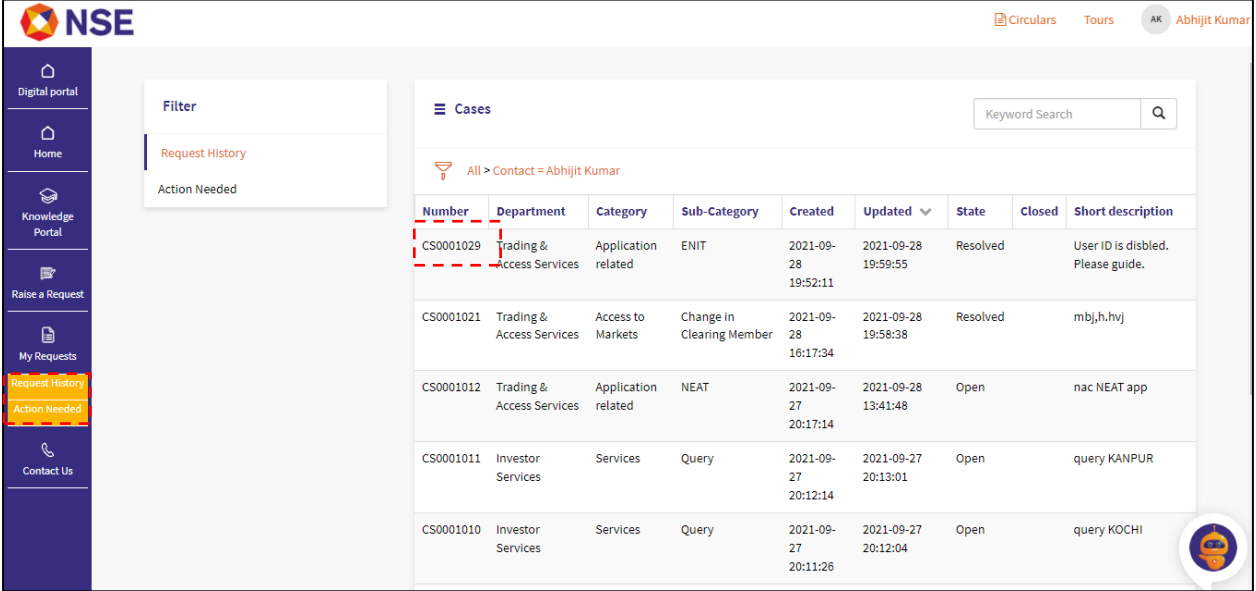
The screenshot shows the NSE Helpdesk Portal interface with the case in the 'Resolved' state. The 'Reopen Case' button is highlighted with a red dashed box in the 'User Actions' section. The case details form shows the state as 'Resolved'. The 'Case details' section shows the case number (CS0001029), priority (3 - Moderate), assigned to (Varun Singh), state (Resolved), account (ZERODHA BROKING LIMITED), contact (Abhijit Kumar), and updated time (1m ago). The 'Attachments' section has a 'Drop files here' prompt.

Note:

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

3.7 Viewing All Cases of Logged in Member

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.



NSE Circulars Tours AK Abhijit Kumar

Filter

Request History

Action Needed

Cases

Keyword Search

All > Contact = Abhijit Kumar

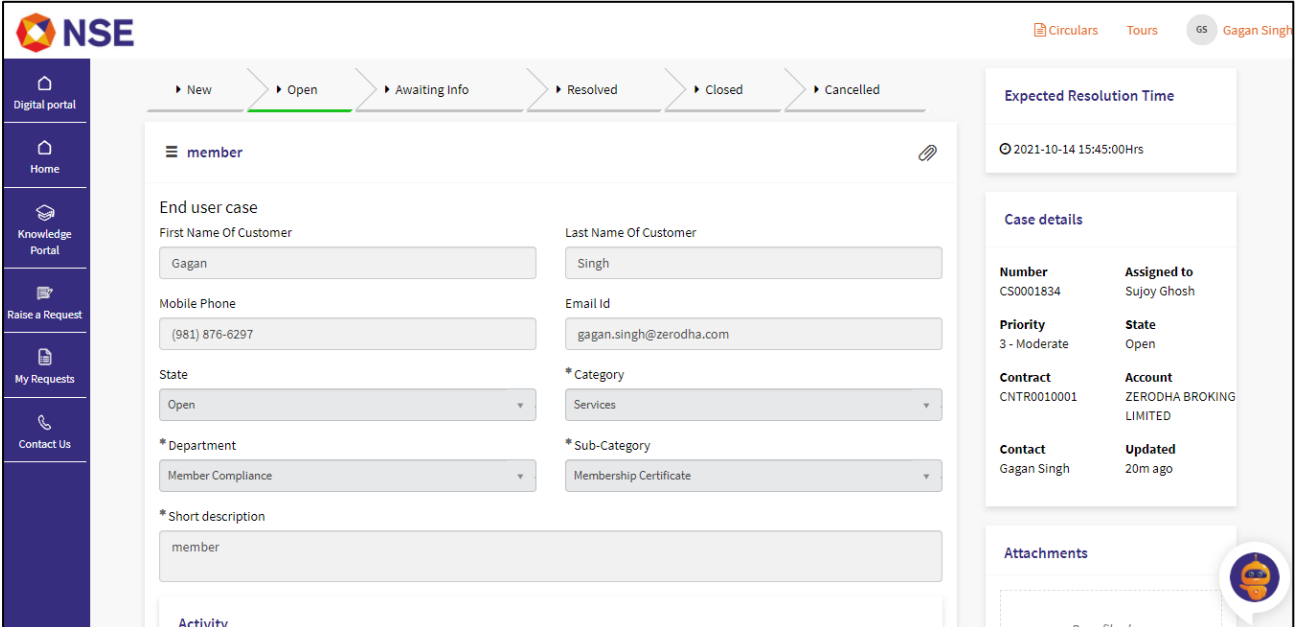
Number	Department	Category	Sub-Category	Created	Updated	State	Closed	Short description
CS0001029	Trading & Access Services	Application related	ENIT	2021-09-28 19:52:11	2021-09-28 19:59:55	Resolved		User ID is disabled. Please guide.
CS0001021	Trading & Access Services	Access to Markets	Change in Clearing Member	2021-09-28 16:17:34	2021-09-28 19:58:38	Resolved		mbj,h,hvj
CS0001012	Trading & Access Services	Application related	NEAT	2021-09-27 20:17:14	2021-09-28 13:41:48	Open		nac NEAT app
CS0001011	Investor Services	Services	Query	2021-09-27 20:12:14	2021-09-27 20:13:01	Open		query KANPUR
CS0001010	Investor Services	Services	Query	2021-09-27 20:11:26	2021-09-27 20:12:04	Open		query KOCHI

3.8 Viewing a Case

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

The member 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).



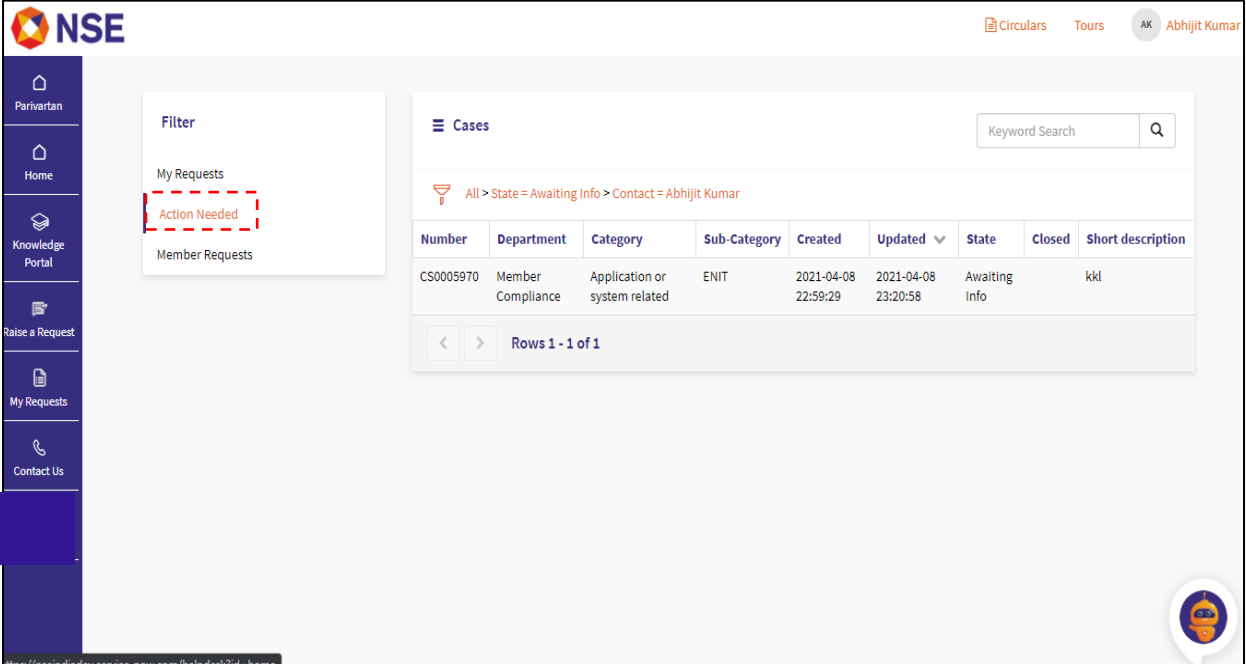
The screenshot displays the NSE Digital portal interface for viewing a case. The top navigation bar includes the NSE logo, a user profile (Gagan Singh), and links for Circulars and Tours. A sidebar on the left contains navigation options: Digital portal, Home, Knowledge Portal, Raise a Request, My Requests, and Contact Us. The main content area shows a case progress bar with stages: New, Open (current), Awaiting Info, Resolved, Closed, and Cancelled. Below the progress bar, the case details for a 'member' case are displayed in a form. The form includes fields for First Name Of Customer (Gagan), Last Name Of Customer (Singh), Mobile Phone ((981) 876-6297), Email Id (gagan.singh@zerodha.com), State (Open), * Category (Services), * Department (Member Compliance), * Sub-Category (Membership Certificate), and * Short description (member). To the right of the form, there is a section for 'Expected Resolution Time' (2021-10-14 15:45:00Hrs) and a 'Case details' section. The 'Case details' section contains a table with the following information:

Number	Assigned to
CS0001834	Sujoy Ghosh
Priority	State
3 - Moderate	Open
Contract	Account
CNTR0010001	ZERODHA BROKING LIMITED
Contact	Updated
Gagan Singh	20m ago

Below the case details, there is an 'Attachments' section with a 'Drop files here' prompt and a circular icon for adding attachments. At the bottom of the form, there is an 'Activity' section.

3.9 Action Needed Section

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



Filter

- My Requests
- Action Needed**
- Member Requests

Cases

Keyword Search

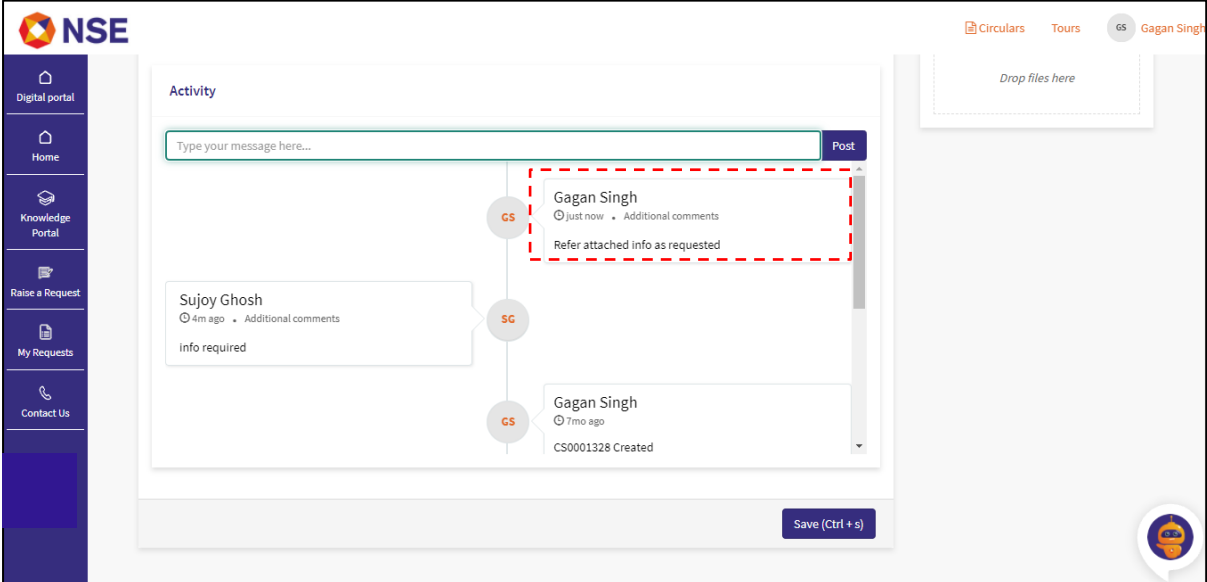
All > State = Awaiting Info > Contact = Abhijit Kumar

Number	Department	Category	Sub-Category	Created	Updated	State	Closed	Short description
CS0005970	Member Compliance	Application or system related	ENIT	2021-04-08 22:59:29	2021-04-08 23:20:58	Awaiting Info		kkl

< > Rows 1 - 1 of 1

3.10 Viewing a Case Requiring Member 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 displays the NSE Digital portal interface. On the left is a vertical sidebar with navigation options: Digital portal, Home, Knowledge Portal, Raise a Request, My Requests, and Contact Us. The main content area is titled 'Activity' and shows a conversation thread. At the top is a text input field 'Type your message here...' with a 'Post' button. The activity feed shows a message from Sujoy Ghosh (4m ago) with the text 'Info required'. Below it is a response from Gagan Singh (just now) with the text 'Refer attached info as requested', which is highlighted by a red dashed box. At the bottom of the feed, it says 'Gagan Singh 7mo ago CS0001328 Created'. A 'Save (Ctrl + s)' button is located at the bottom right of the activity section. On the far right, there is a 'Drop files here' area and a user profile for Gagan Singh.

Note:

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

4 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

