



USER MANUAL

Helpdesk Portal

Objective:

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

Intended Users: NSE Members

Document Owner: National Stock Exchange of India



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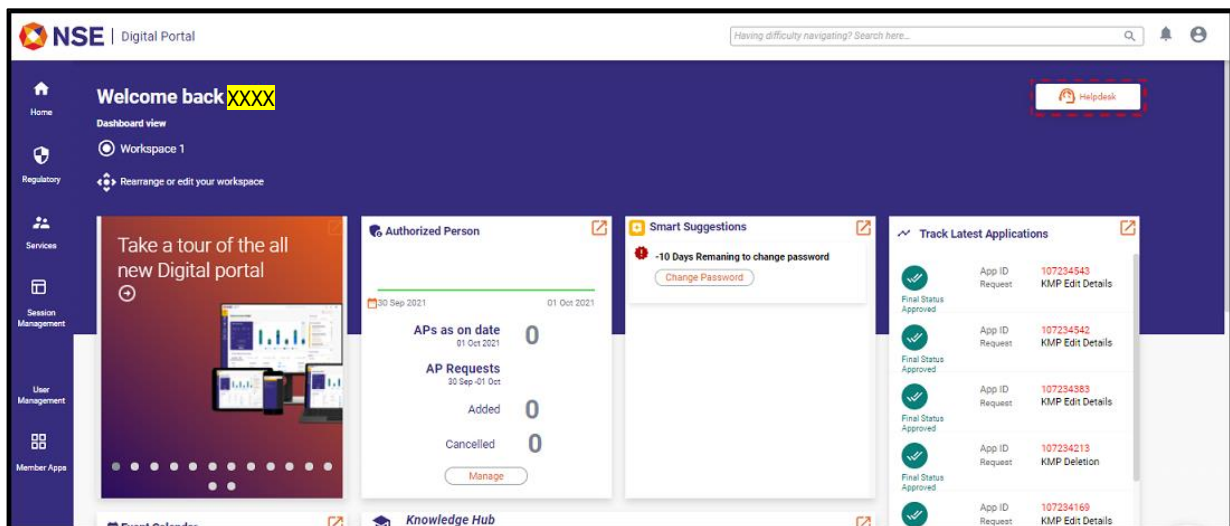
1. Helpdesk portal view for Logged-in Member

1.1. Logged-in Member

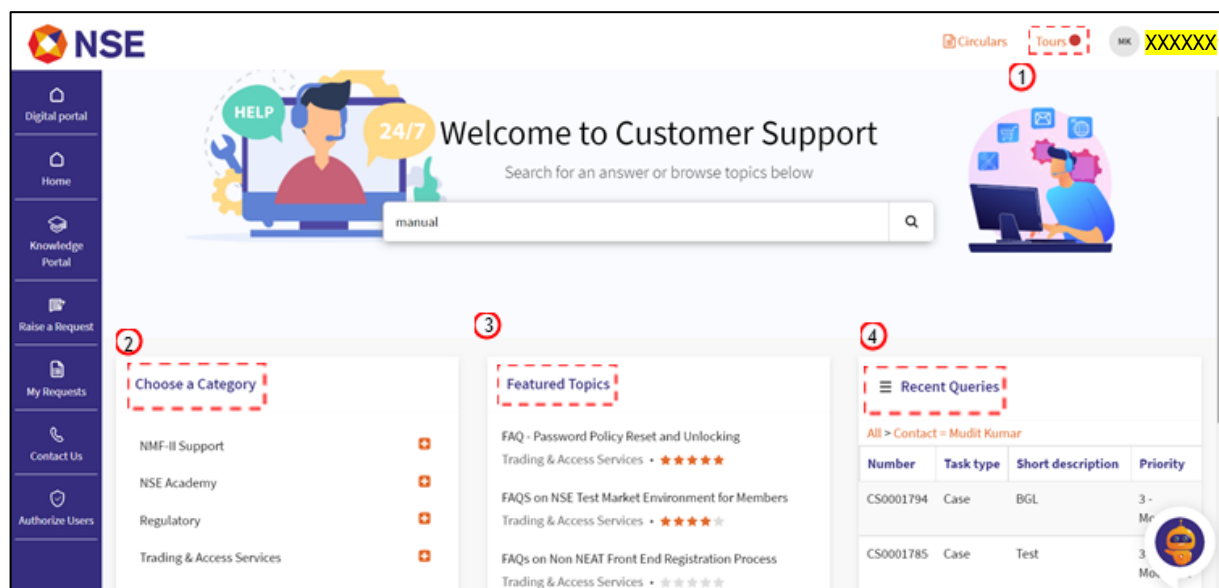
A user who is already logged-in using existing credentials in the NSE Digital Portal (<https://digitalexchange.nseindia.com>) and wishes to access the Helpdesk Portal.

1.2. Helpdesk Homepage

A logged-in member will be redirected from NSE Digital Portal (<https://digitalexchange.nseindia.com>) after selecting the Helpdesk option on the top right corner of the NSE Digital Portal page.



Once redirected to the Helpdesk Portal homepage, the following view shall be visible to members.



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

1. User can click on the 'Tours' button which is a step-by-step virtual guide to help Member get familiarized with the Helpdesk portal
2. 'Choose a Category' section displays Knowledge category to help search relevant articles as per member's query
3. 'Featured Topics' Section displays most viewed FAQs and topics
4. 'Recent Queries' section displays list of recently created cases by the user

1.3. NSE Digital Portal Tab

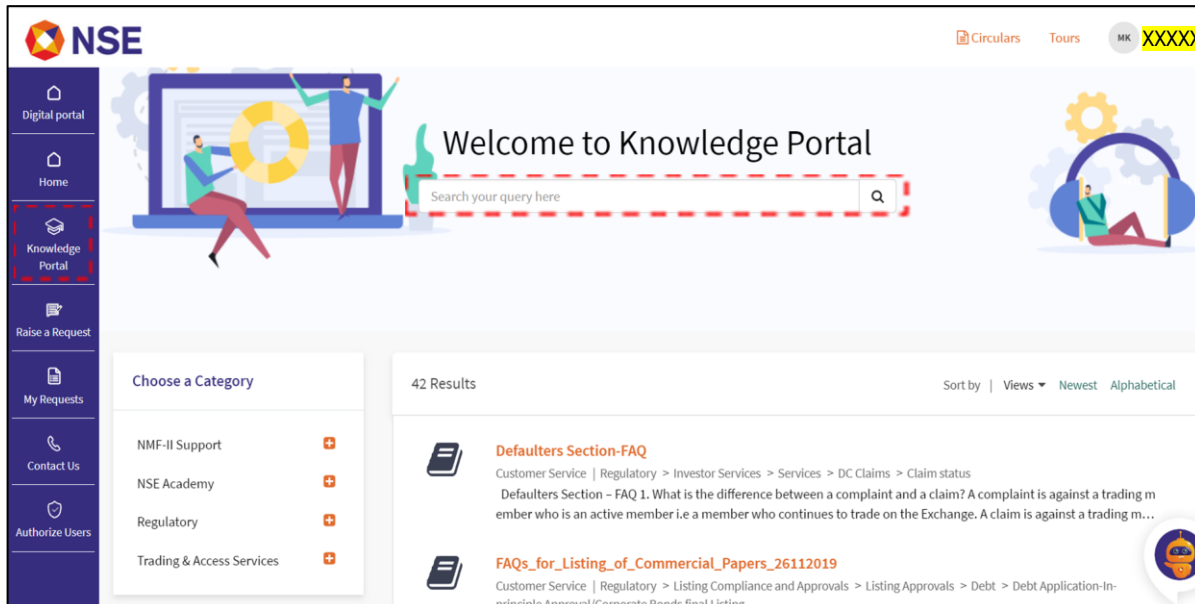
On clicking this option, the member will be redirected to the NSE Digital Portal.

1.4. Home Tab

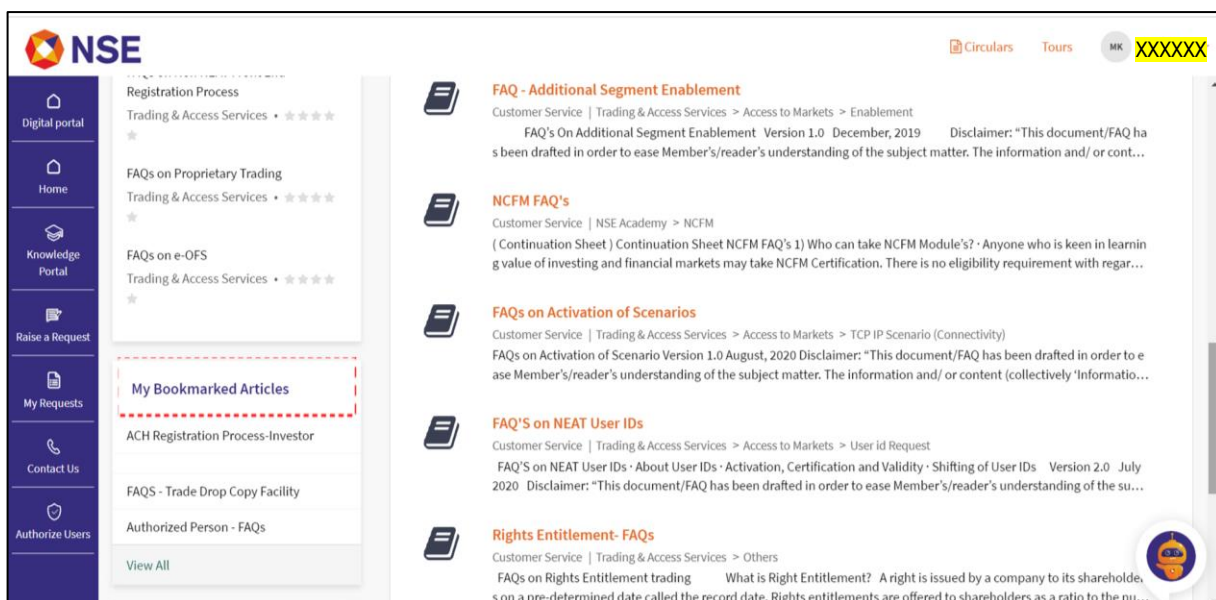
On clicking this option, the member can come back to the Helpdesk homepage from anywhere in the Helpdesk portal.

1.5. Knowledge Portal Tab

On clicking the knowledge portal button, the member is redirected to the knowledge portal, where one 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 knowledge portal.



The members can navigate to knowledge portal and see their bookmarked articles and search history. The user can also read an article by searching or by choosing a category.

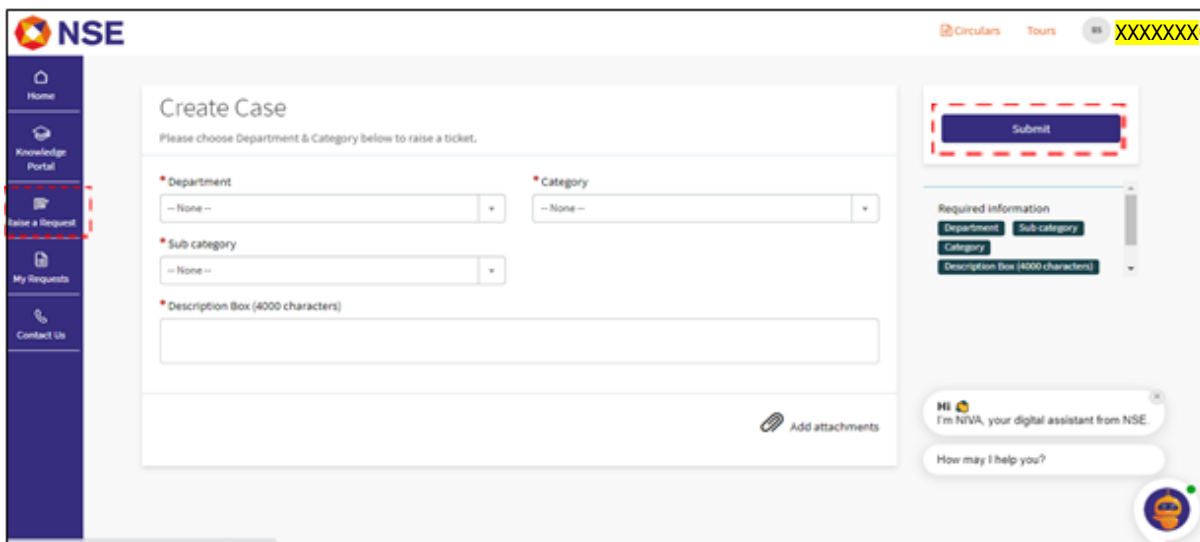


The member can view the document by clicking on the article name. There are various options such as bookmark, download, rate, and comment on the article. Additionally, members can also mark the article as helpful.



1.6. Raise a Request Tab

A logged-in member can create a case by clicking on the Raise a Request Tab. Member needs to fill in the required information in the mandatory fields i.e. department, category, sub-category and description. Members may also add attachments if needed. Upon clicking submit, a case is created on the Helpdesk Portal for the selected query.



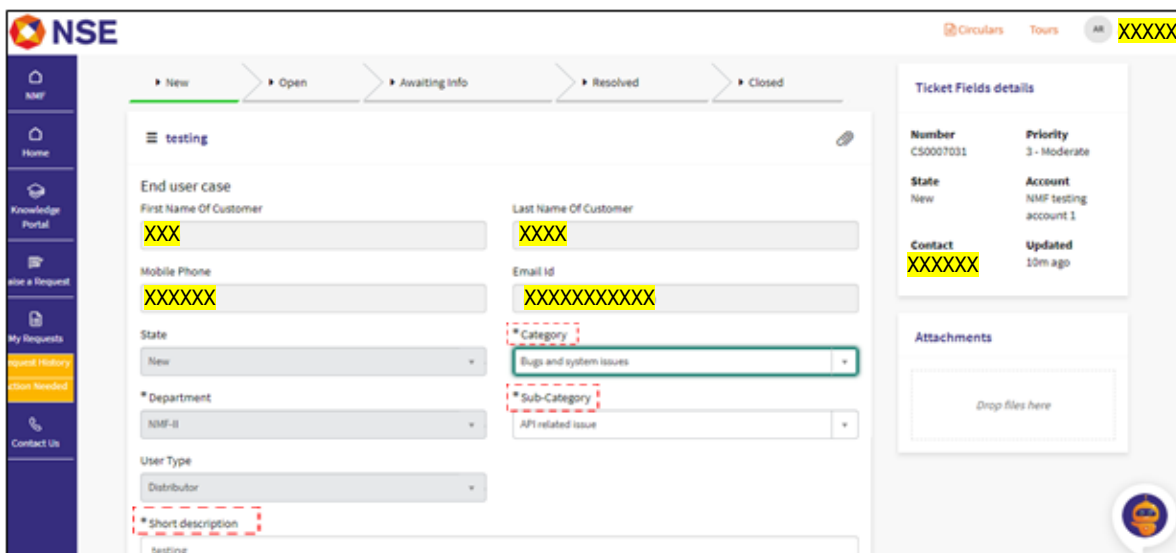
1.7. Case statuses and available functionalities

1.7.1. Case status - 'New'

Before the case is assigned to a helpdesk executive, the status of the case in the Helpdesk portal will reflect as 'New'. The functions available in helpdesk portal for a case in status 'New' are listed below.

a. Edit a case

The member can modify details like category, sub-category and short description fields.



The screenshot displays the NSE Helpdesk Portal interface for a 'New' case. The main form is titled 'testing' and contains the following fields:

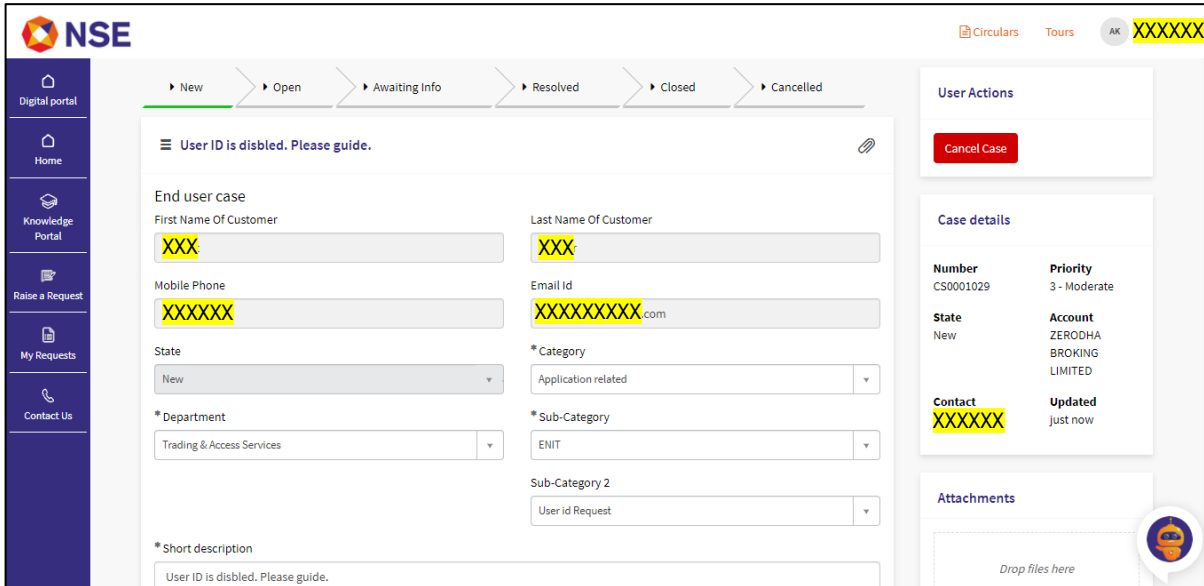
- End user case:**
 - First Name Of Customer: XXX
 - Last Name Of Customer: XXXX
 - Mobile Phone: XXXXXX
 - Email Id: XXXXXXXXXXXX
 - State: New
 - * Department: NMF-II
 - User Type: Distributor
 - * Short description: testing
- Case Classification:**
 - * Category: Bugs and system issues
 - * Sub-Category: API related issue

The 'Ticket Fields details' sidebar on the right shows:

- Number: C50007031
- Priority: 3 - Moderate
- State: New
- Account: NMF testing account 1
- Contact: XXXXXX
- Updated: 10m ago

The 'Attachments' section at the bottom right has a 'Drop files here' prompt.

- b. **Cancel Case:** Member can cancel a case having status as 'New' using the 'Cancel Case' button.



NSE

Circulars Tours AK XXXXXX

► New ► Open ► Awaiting Info ► Resolved ► Closed ► Cancelled

≡ User ID is disabled. Please guide.

End user case

First Name Of Customer: XXX

Last Name Of Customer: XXX

Mobile Phone: XXXXXX

Email Id: XXXXXXXXX.com

State: New

* Category: Application related

* Department: Trading & Access Services

* Sub-Category: ENIT

Sub-Category 2: User id Request

* Short description: User ID is disabled. Please guide.

User Actions

Cancel Case

Case details

Number CS0001029	Priority 3 - Moderate
State New	Account ZERODHA BROKING LIMITED
Contact XXXXXXX	Updated just now

Attachments

Drop files here

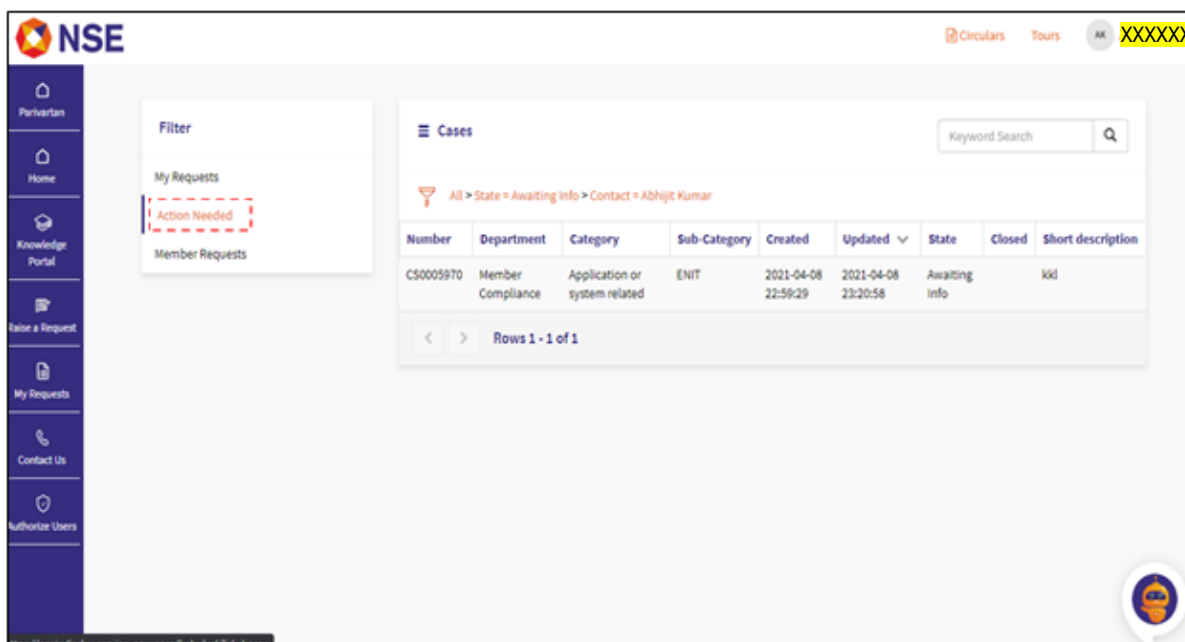
1.7.2. Case status - 'Open'

Once a case gets assigned to a Helpdesk executive, the executive details are updated and the status of the case is changed to 'Open' in Helpdesk portal.

1.7.3. Case status - 'Awaiting info'

In-case the helpdesk executive requires additional information from the member regarding the case, the executive changes the status of the case to 'Awaiting info'. The executive also updates the information required from the member pertaining to the case.

Cases where status is 'Awaiting info' are visible in the 'Action Needed' link in 'My Requests' Tab.

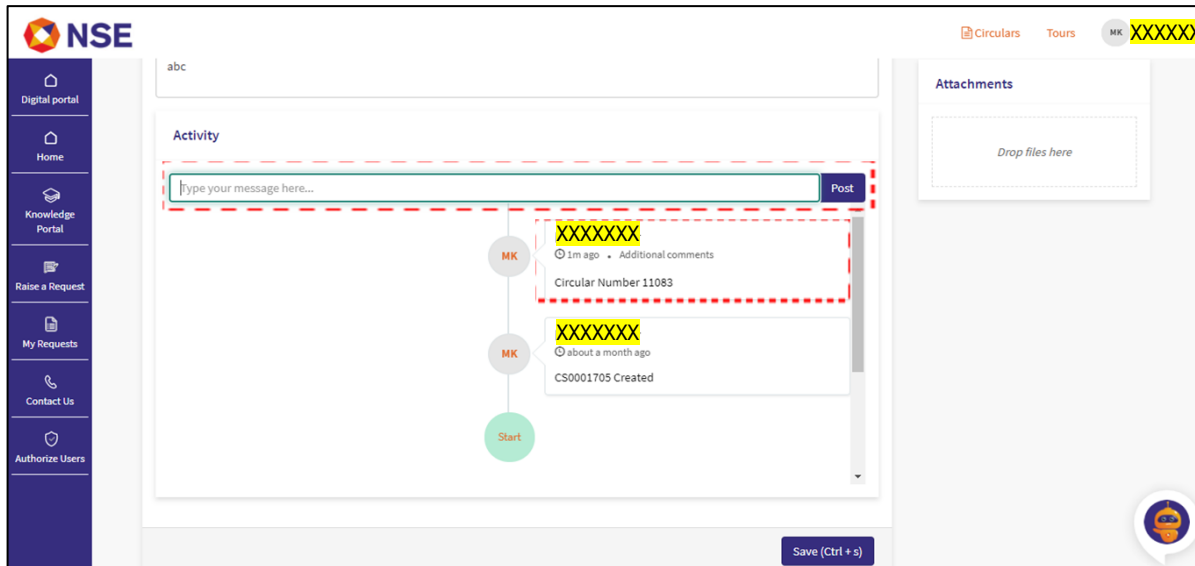


On clicking a case in 'Action Needed' section, the member can view executives' comments regarding information or document/screenshot required from the member. Accordingly, the member can enter the information/suitable remarks in the Activity section and click the 'Post' button.

Further, the member can also share documents/screenshots/files, following the process below:

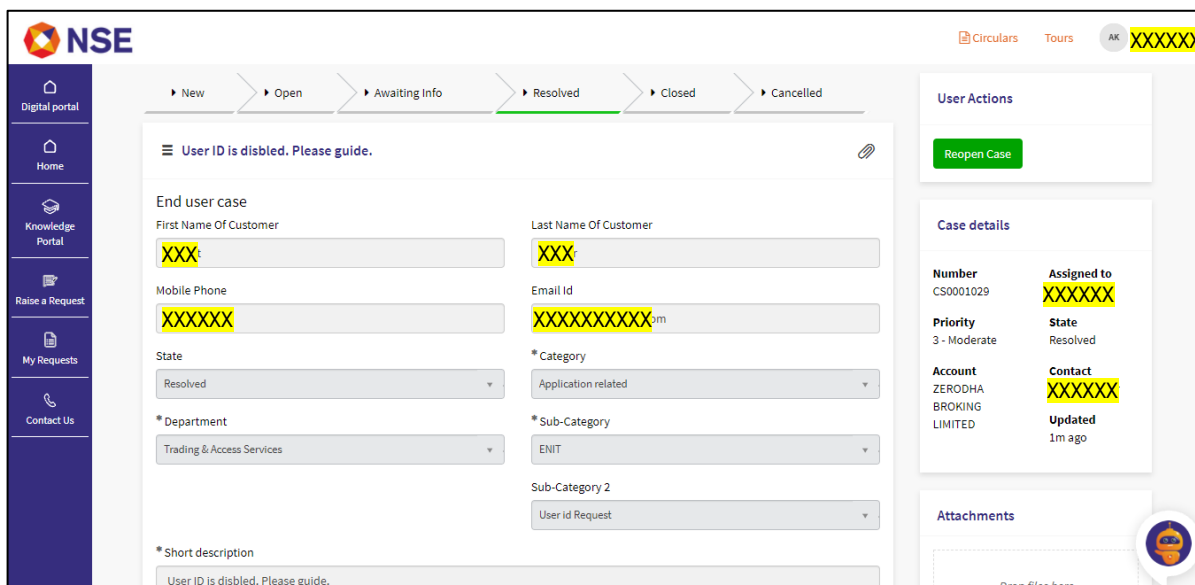
- Click attach button and browse file that needs to be uploaded or drop file directly in the drop file section
- Press 'Save' button

Member provided information and/or uploaded documents/screenshots/files along with remarks will be visible to the executive to whom the case is assigned.



1.7.4. Case status - 'Resolved'

The executive will update the status of the case as 'Resolved' after members' query has been addressed. Member has an option to re-open the resolved case within 3 working days, if the resolution is not satisfactory. This can be done using the 'Re-Open Case' button after selecting the case.



1.7.5. Case status - 'Closed'

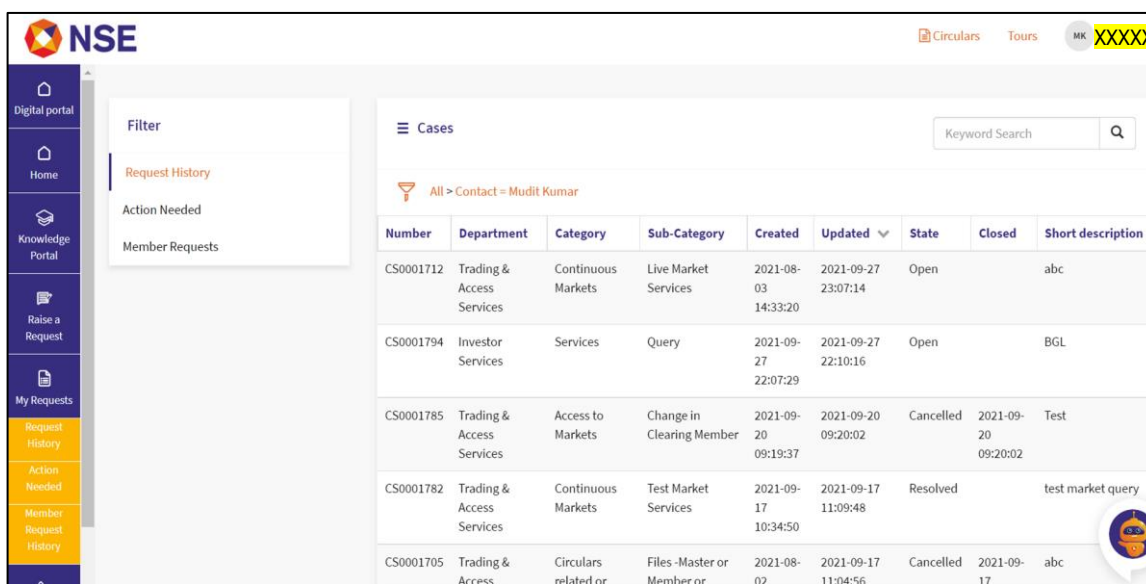
A case having status 'Resolved' is changed to 'Closed' after 3 working days. Closed cases cannot be Re-opened.

1.8. My Requests Tab

Members can click on 'My Requests' tab to access the below 3 functions:

1.8.1. Request History

All historical cases created by a member is visible in 'Request History' option under 'My Requests' tab. Here, members can check the Department, Category, Sub-category, Created Date, Updated Date, State of all cases.



Number	Department	Category	Sub-Category	Created	Updated	State	Closed	Short description
CS0001712	Trading & Access Services	Continuous Markets	Live Market Services	2021-08-03 14:33:20	2021-09-27 23:07:14	Open		abc
CS0001794	Investor Services	Services	Query	2021-09-27 22:07:29	2021-09-27 22:10:16	Open		BGL
CS0001785	Trading & Access Services	Access to Markets	Change in Clearing Member	2021-09-20 09:19:37	2021-09-20 09:20:02	Cancelled	2021-09-20 09:20:02	Test
CS0001782	Trading & Access Services	Continuous Markets	Test Market Services	2021-09-17 10:34:50	2021-09-17 11:09:48	Resolved		test market query
CS0001705	Trading & Access	Circulars related or	Files -Master or Member or	2021-08-02	2021-09-17 11:04:56	Cancelled	2021-09-17	abc

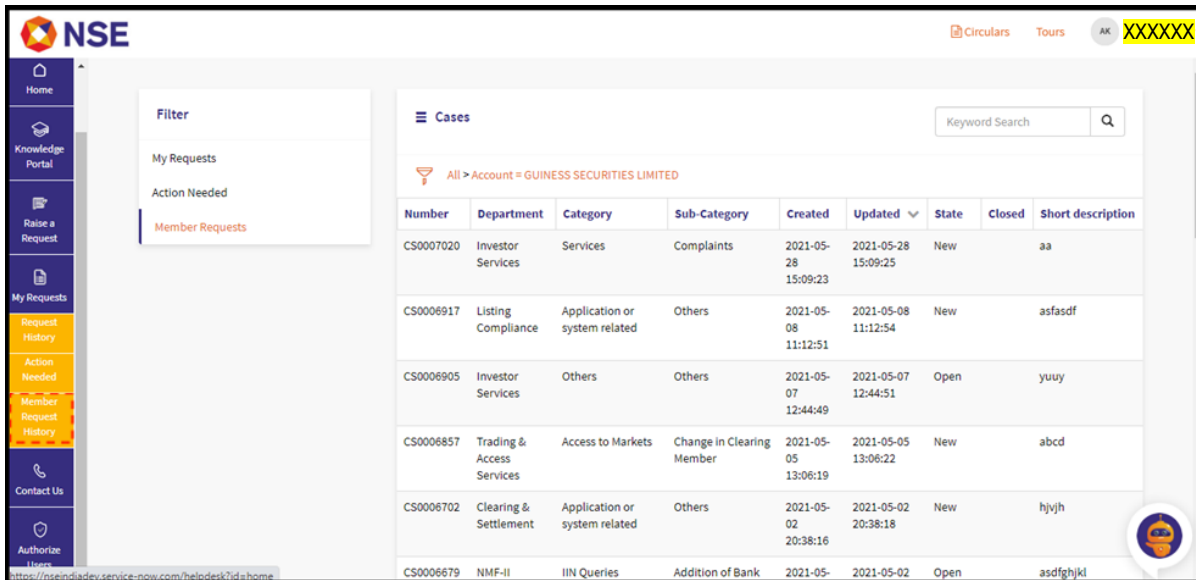
Historical request of the user i.e. Calls, Emails and Helpdesk Portal are visible in 'Request History'

1.8.2. Action Needed

As described in point 1.7.3, members may take appropriate action on a case.

1.8.3. Member Request History (Only visible to Super user)

Admin user of NSE Digital Portal is the Super user in the Helpdesk Portal. A Super User can view all the cases/requests raised by all users under the Member by clicking the 'Member Request History' option in the 'My Requests' Tab.

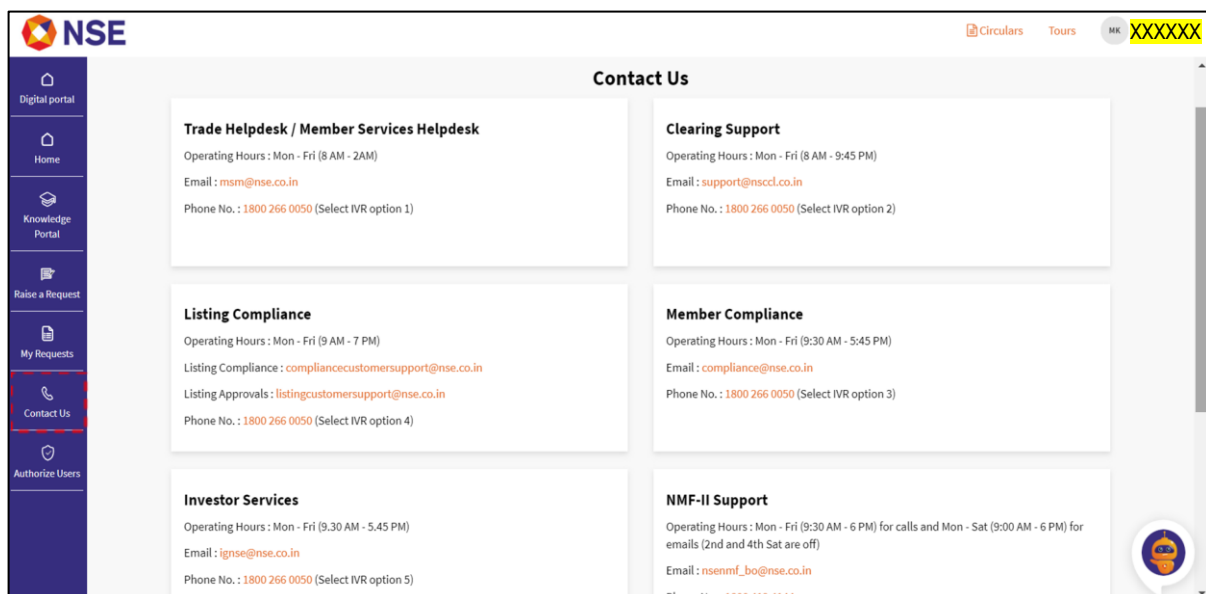


Number	Department	Category	Sub-Category	Created	Updated	State	Closed	Short description
CS0007020	Investor Services	Services	Complaints	2021-05-28 15:09:23	2021-05-28 15:09:23	New		aa
CS0006917	Listing Compliance	Application or system related	Others	2021-05-08 11:12:51	2021-05-08 11:12:54	New		asfasdf
CS0006905	Investor Services	Others	Others	2021-05-07 12:44:49	2021-05-07 12:44:51	Open		yuuy
CS0006857	Trading & Access Services	Access to Markets	Change in Clearing Member	2021-05-05 13:06:19	2021-05-05 13:06:22	New		abcd
CS0006702	Clearing & Settlement	Application or system related	Others	2021-05-02 20:38:16	2021-05-02 20:38:18	New		hvjyh
CS0006679	NMF-II	IIN Queries	Addition of Bank	2021-05-	2021-05-02	Open		asdfghjkl

Historical request of the member i.e. Calls, Emails and Helpdesk portal are visible in 'Member Request History'

1.9. Contact Us page

On clicking the 'Contact Us' button, the user will be redirected to the page where user can view the contact information for all the Helpdesks.



Category	Operating Hours	Email	Phone No.
Trade Helpdesk / Member Services Helpdesk	Mon - Fri (8 AM - 2AM)	msm@nse.co.in	1800 266 0050 (Select IVR option 1)
Clearing Support	Mon - Fri (8 AM - 9:45 PM)	support@nsccl.co.in	1800 266 0050 (Select IVR option 2)
Listing Compliance	Mon - Fri (9 AM - 7 PM)	compliancecustomersupport@nse.co.in	1800 266 0050 (Select IVR option 4)
Member Compliance	Mon - Fri (9:30 AM - 5:45 PM)	compliance@nse.co.in	1800 266 0050 (Select IVR option 3)
Investor Services	Mon - Fri (9:30 AM - 5:45 PM)	ignse@nse.co.in	1800 266 0050 (Select IVR option 5)
NMF-II Support	Mon - Fri (9:30 AM - 6 PM) for calls and Mon - Sat (9:00 AM - 6 PM) for emails (2nd and 4th Sat are off)	nsemf_bo@nse.co.in	1800 419 4144

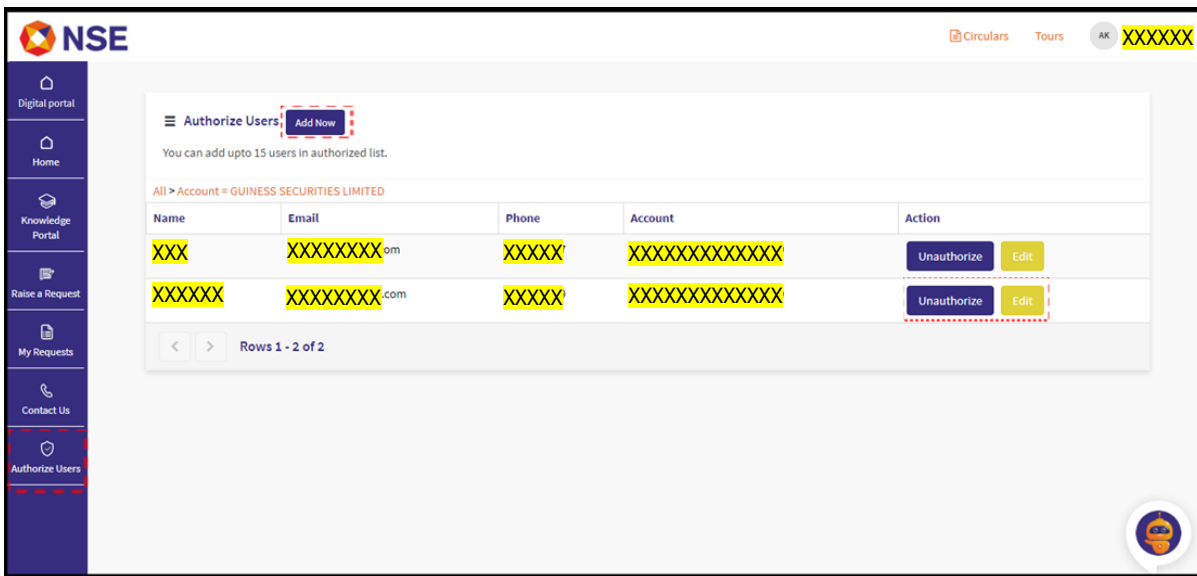
1.10. Authorize Users (Only visible to Super User)

Admin user of NSE Digital Portal is the Super user in helpdesk portal. Super user needs to navigate through the left pane and click on 'Authorized users' button.

As an initiative to improve ease of accessibility to Trade helpdesk the Exchange has facilitated authentication of up to 15 dedicated users through the Helpdesk portal, thus enabling calls from these contacts to connect quickly to Trade helpdesk executives on the toll-free number 1800 266 0050 IVR option 1, as compared to unauthorized users.

Super User may add/edit users using the Add New/Edit button (for changes in email id, mobile number of an existing user) available in the 'Authorized Users' tab. Users may use the Unauthorize button to remove users from the list.

Any updation under the "Authorise users" tab shall immediately be saved in the system upon being submitted. However, it may be noted that it can take up to 24 hours for this information to be updated and activated/deactivated in the Exchange systems.

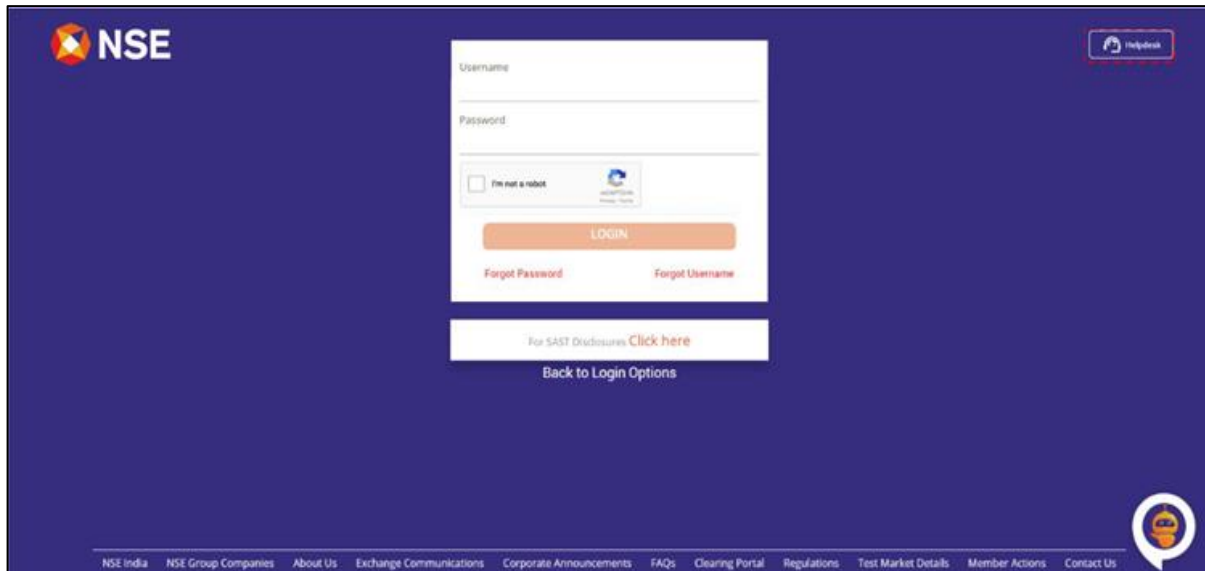


Name	Email	Phone	Account	Action
XXX	XXXXXXXXXom	XXXXX	XXXXXXXXXXXXXXXXXX	Unauthorize Edit
XXXXXX	XXXXXXXXX.com	XXXXX	XXXXXXXXXXXXXXXXXX	Unauthorize Edit

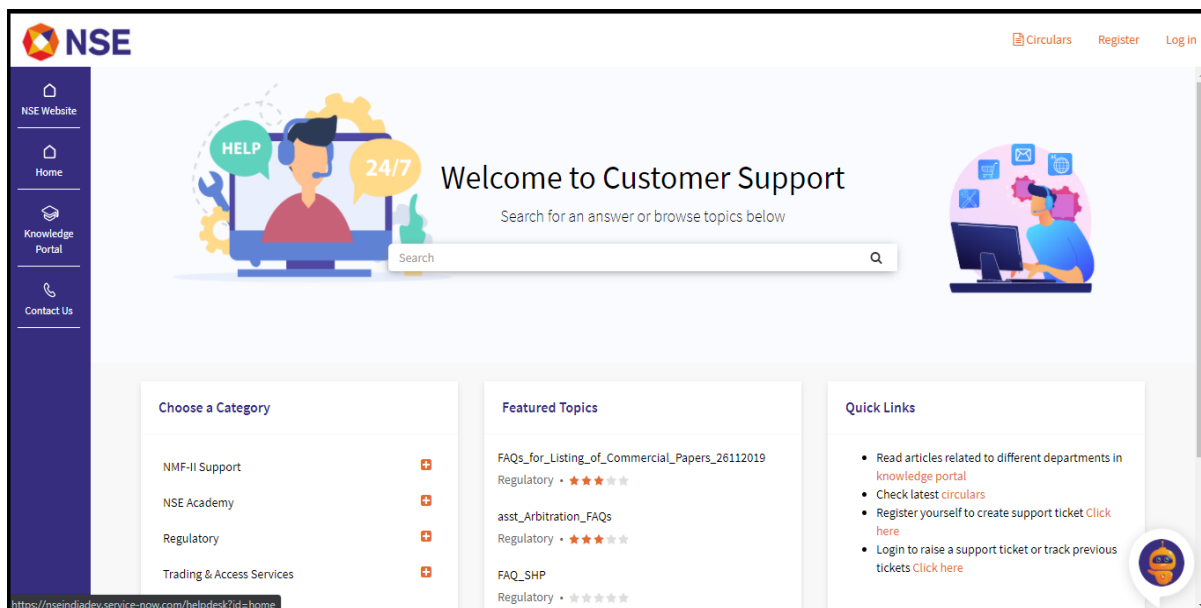
2. Helpdesk portal view for Non Logged-in Member

A user visiting the Helpdesk portal homepage without logging in from the Digital Portal.

The Helpdesk portal homepage can be accessed by clicking the 'helpdesk' button appearing on the top right corner of the pre-login screen of the Digital Portal.



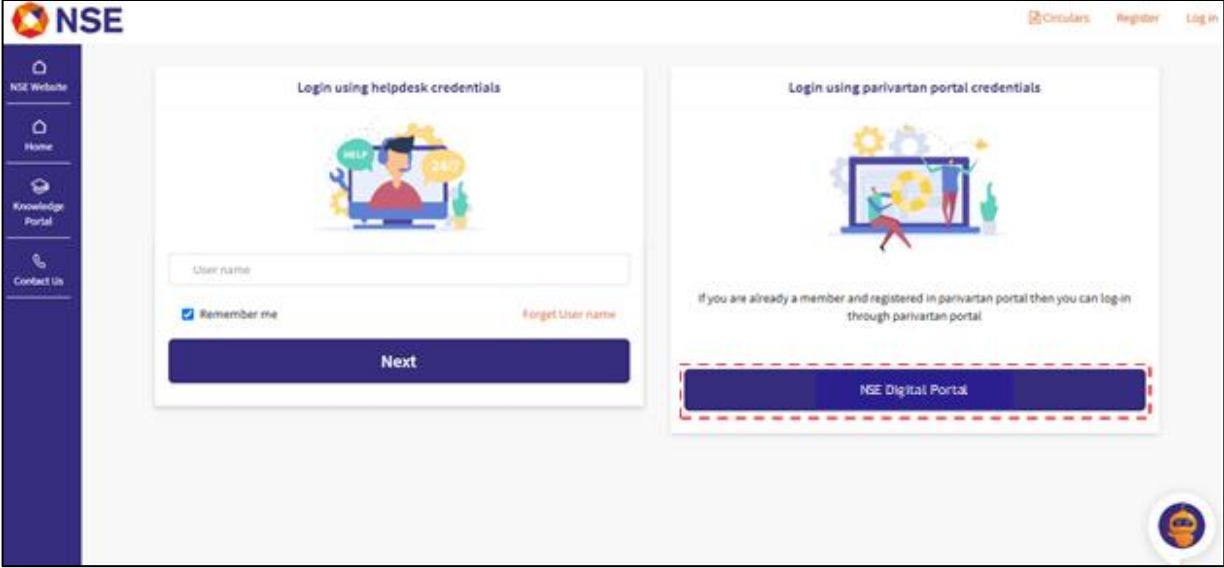
After clicking the helpdesk' button, below screen is visible.



A non-logged-in member will have access to the Knowledge portal tab and Contact us tab on the left tabs of the screen as illustrated above. However, the below functionalities are not available to Non-logged in Members:

- Raise a request
- Request History
- Authorize User

In order to access the above functionalities, the user shall click the login button as illustrated in the previous screen and shall be re directed to the further enter log in credentials after selecting 'NSE Digital Portal Login' button as per the screen shot illustrated below.



3. NSE Chatbot

User can click on Chatbot Icon on the 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

