

## Login in CBOS -2.0



#### Login in CBOS -2.0



## CBOS 2.0 --Query form



## How to raise query through Query Form - (SELF)

Click on SELF- If you need the customer information for your OWN review for list of clients.

Click on **CLIENT**- If you need the **particular** client's information.

Email will be triggered to your email id in both the above scenarios.



## How to raise query through Query Form - (Client)

RAISE A TICKET			Mention client code & sear	ch	
Self Olient Client Co	de Client Code	Q			
Query Category (Required) Select an option			<b>×</b>		In case if you are not able to understand which query type then you can download excel to check the list
add		Mention the key example Bank it	word of query to search will popup all the listed que select one	. for eries &	
Address updation process					
Address updation status Rejection details -address updation					
Subject (Required)					
Describe your query in detail (Required) Mention your query in detail (Re	quired)			Mention subject 8	ል Query in details
Minimum 50 characters required.					
Choose File No file chose	n		Click on Choose file fo multiple doc	or attaching the doo umentPlease att	cument . Note if ach ZIP
File size : Max 800KB allowed. Please upload : Supported Types : jpeg, jpg,png,pdf,doc,xlsx,x	tip files for multiple attachments ls,zip,docx.	-			
Click on Subm	it to raise the query				

# **Query raised for Mapped customer**

Self Olient	Q
Query Category (Required)	
Bank updation process	×
Subject (Required) Need to undertand the process to update Bank	
Describe your query in detail (Required)	Your ticket has been created with Interaction
Please provide the detailed process to update the bank	ID: 20252599. You will get a response from our support team within 6 working hours.
Minimum 50 characters required. Upload Document Choose File No file chosen	Done Once you click on Submit ,the Interaction id will be created , which can be referred for query tracking
File size : Max 800KB allowed. Please upload zip files for multiple attachments.	



# **Query Tracking for self and Client**



#### Interaction Detail

INTERACTIONID	CREATED DATE	CLIENTCODE	SUBJECT	STATUS
21049669	25 Oct 2024		testing	Resolved
21049559	25 Oct 2024		testing	Resolved
21046541	25 Oct 2024		test	Resolved
21044725	25 Oct 2024		test	Resolved
21044592	25 Oct 202+		Test	Resolved

By default you will be able to view latest 5 queries raised by you (self/client)

# **Query Tracking for self and Client**

Query Form	Track Query		Enter the Interaction id to search a	any		
Track Your	Query		particular query raised by you			۵
Interaction ID 21049669	Interaction ID*         Content         Content					
Interactio	on Detail					۵
INTERAC	TIONID		CREATED DATE	CLIENTCODE	SUBJECT	STATUS
21049669			25 Oct 2024		testing	Resolved
		Click on Interaction detailed con	n id for checking versation			

# **Query details**

InteractionID	Content
20252951	Your interaction id is: 20252951
20232331	Further for swift assistance on your query we request you to send all communications from your registered email address along with your Client Code in
	While we strive to respond promptly, please allow us up to 06 working hours to address your query.
	If you have any additional information to add or if there are any updates on your end regarding the query, please feel free to reply to this email.
	Regards, MOFSL Customer Service Team
	*Note: Please note that our operating hours are Monday to Friday, from 9:00 AM to 6:00 PM (excluding Saturdays and Public holidays). Responses may be delayed outside of these hours Original Message From: Haresh Kumbhar [haresh.kumbhar@motilaloswal.com] Sent: Friday, Aug 23 2024 12:40PM To: Open [support@motilaloswal.com]
	Subject: Need to undertand the pr Please provide the detailed proce NEW guery
20252951	Please provide the detailed proces

# **Query details**

20250796	
	Further for swift assistance on your query we request you to send all communications from your registered email address along with your Client Code in
	While we strive to respond promptly, please allow us up to 06 working hours to address your query.
	If you have any additional information to add or if there are any updates on your end regarding the query, please feel free to reply to this email.
	Regards, MOFSL Customer Service Team
	*Note: Please note that our operating hours are Monday to Friday, from 9:00 AM to 6:00 PM (excluding Saturdays and Public holidays). Responses may be delayed outside of these hours
	Original Message
	Sent: Friday, Aug 23 2024 11:30AM To: Open [support@motilaloswal.com] Subject: Testing for reopen new
	Testing new reopen
20250796	Testing new reopen
New Query	

Need more clarity on this interaction? kindly click here

In case if the query is Resolved/closed and you want more clarity on the same interaction ---Kindly click here 0

## **How to Reopen Query**



# **How to Reopen Query**

	_	This is	applicable for Broking and Distribution employees on	ly
Query Form	Track Query			
Track Your	Query			•
Interaction I	D*	C From date : 16-Aug-2024		Q Search
Interactio	n Detail		Your Interaction ID 20250796 has been	٥
MEDIA		INTERACTIONID	successfully opened.	STATUS
Portal		20252951		Open
Portal		20251501	Dana	Pending
Portal		20252599	Done	Open
Portal		20251331	23 Aug 2024	Open
Portal		20250796	23 Aug 2024	Resolved
		Once we submit the query we will get message as shown. Click done to continue		

## How to create New Query



Need more clarity on this interaction? kindly click here

# New Query creation page

Query Form	Track Query
RAISE A TI	ICKET
🔿 Self 🤇	Client Code Client Code Q
Query Category	ry (Required)
Select an opti	tion
Subject (Requir	ired)
Describe your	query in detail (Required)
Mention you	our query in detail (Required)
Minimum 50 cha	aracters required.
Upload D	Document
Choos	se File No file chosen
File size : Max 1M Supported Types :	AB allowed. Please upload zip files for multiple attachments. : jpeg, jpg,png,pdf,doc,xlsx,xls,zip,docx,msg.

Submit