

Jio Robotic CRM – Feature Overview

1. Customer Registration & Login

- E-Signup form for new customer onboarding
- Secure login access for registered customers

2. Document Submission Flow

- Post-login prompt to upload mandatory documents (e.g., ID proof, business docs)
- Upload status tracking within the dashboard

3. Admin Verification Panel

- Admin view of submitted customer documents
- Option to **verify** or **reject** customer information
- On successful verification, MOU (PDF) auto-generated & emailed to customer



4. MOU Process

- Customer receives MOU via email
- Customer manually fills required fields in the printed MOU
- Customer scans and uploads the filled MOU via their CRM dashboard

5. Terms & Conditions Acceptance

- Prior to MOU submission, customer must accept system-generated **Terms & Conditions**
- Only after accepting, “**Submit MOU**” option becomes available

6. Final Review by Admin

- Admin reviews uploaded MOU PDF
- Admin decision options:
 -  **Accept** – Customer moves to “Approved” status
 -  **Reject** – Admin may provide reason, and notify customer for resubmission

7. Status & Notification System

- Real-time status updates visible to customers (e.g., “Pending”, “Verified”, “MOU Submitted”, “Approved”)
- Email/SMS alerts at key stages:
 - Document submission
 - MOU email sent
 - MOU submission confirmation
 - Final approval/rejection

JIO ROBOTIC CRM

CUSTOMER REGISTRATION
& LOGIN

UPLOAD DOCUMENTS

VERIFY CUSTOMER
DETAILS

MANUALLY FILL MOU

UPLOAD SCANNED PDF

ACCEPT TERMS
& CONDITIONS

VERIFY MOU

SEND
MOU

ACCEPT

REJECT