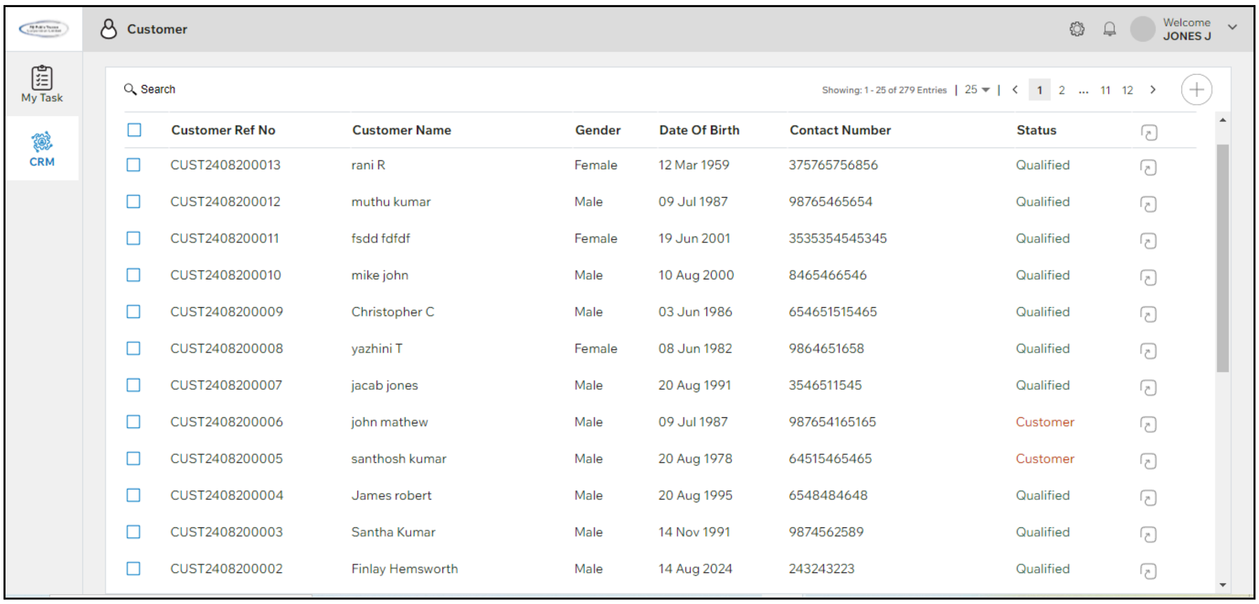
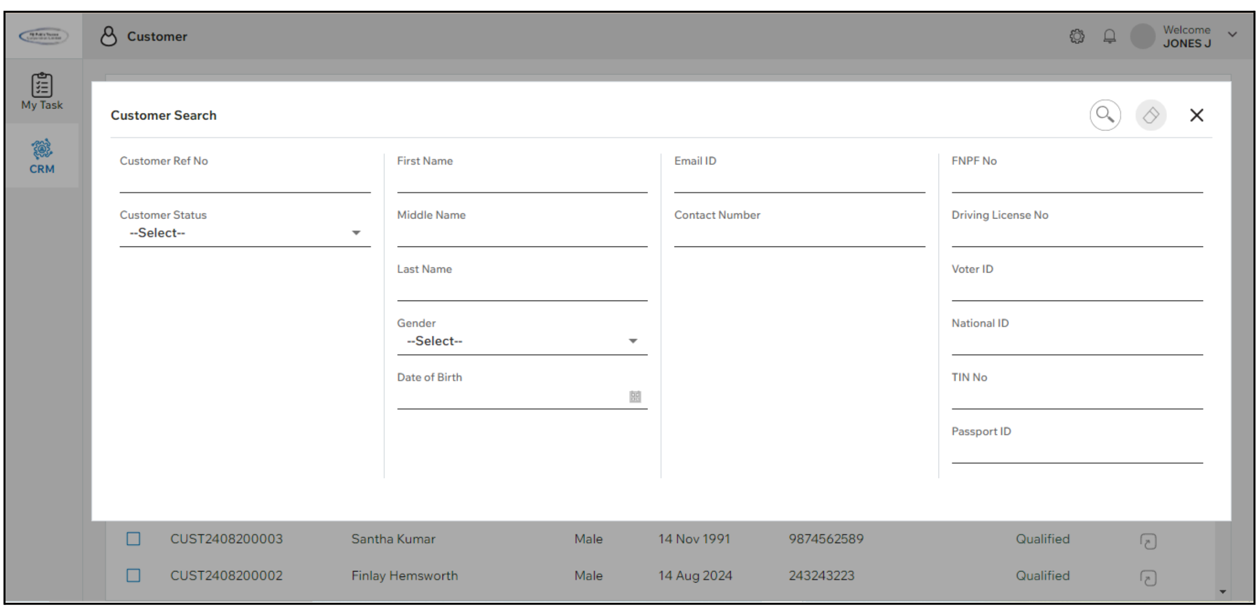
Customer

User : Customer Creation Officer

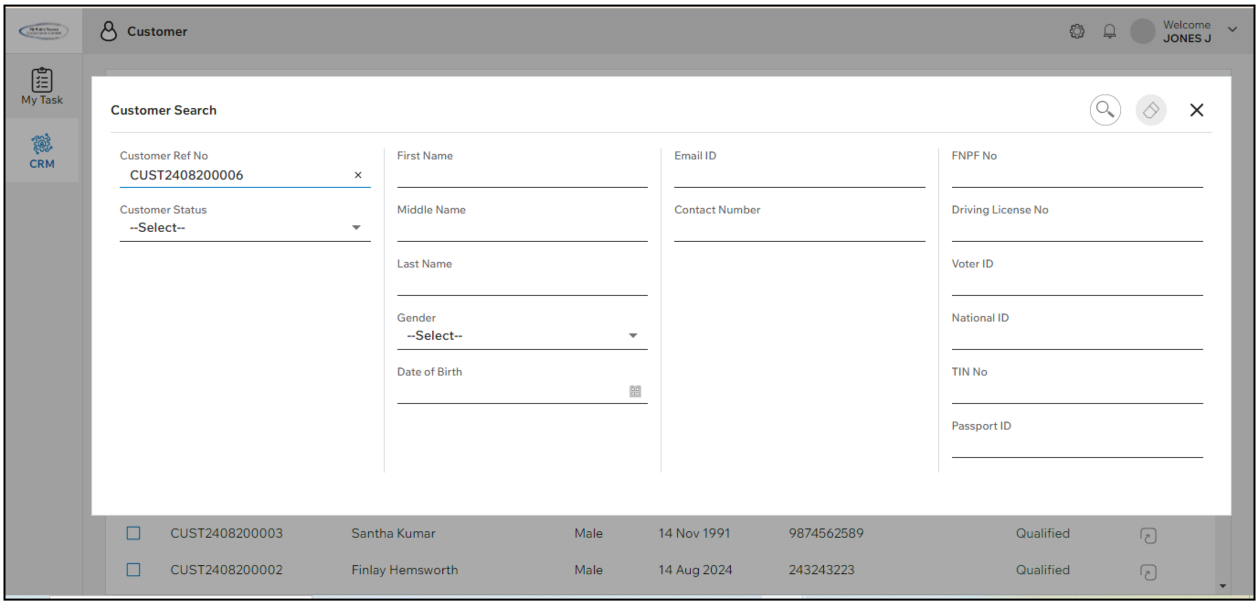
This screen helps to Create, Search and Open the customer. To navigate to this screen click on the **CRM** from the menu and click **Customer**.



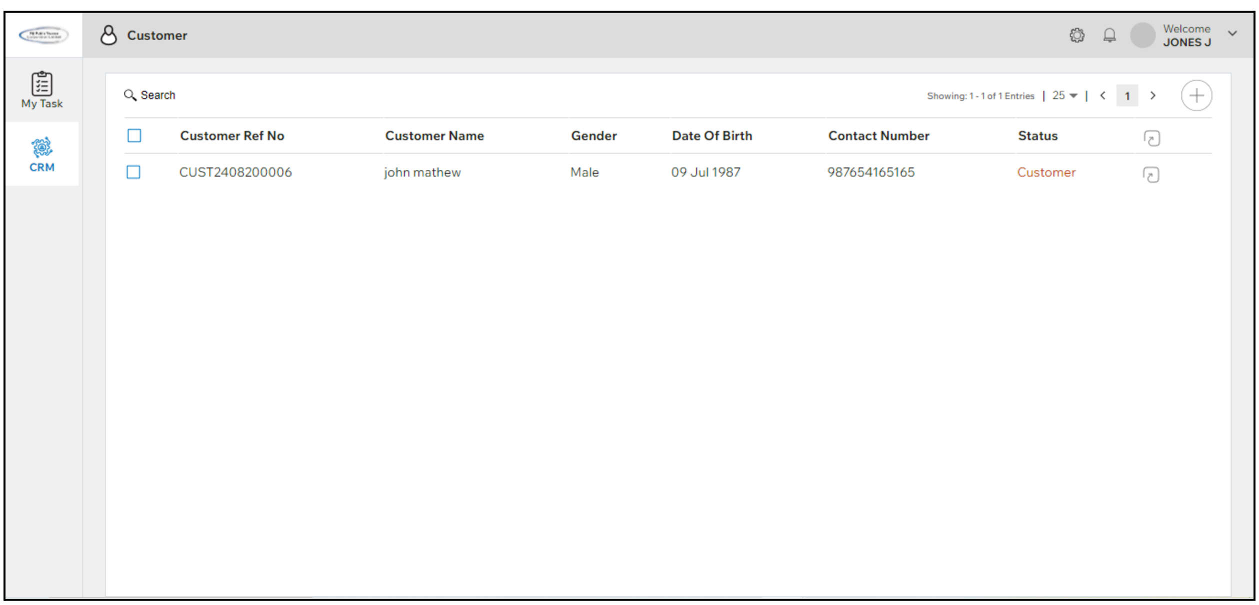
1. Click **Search** button, Customer Search pop up will be displayed, wherein the user can search based on the given parameters.



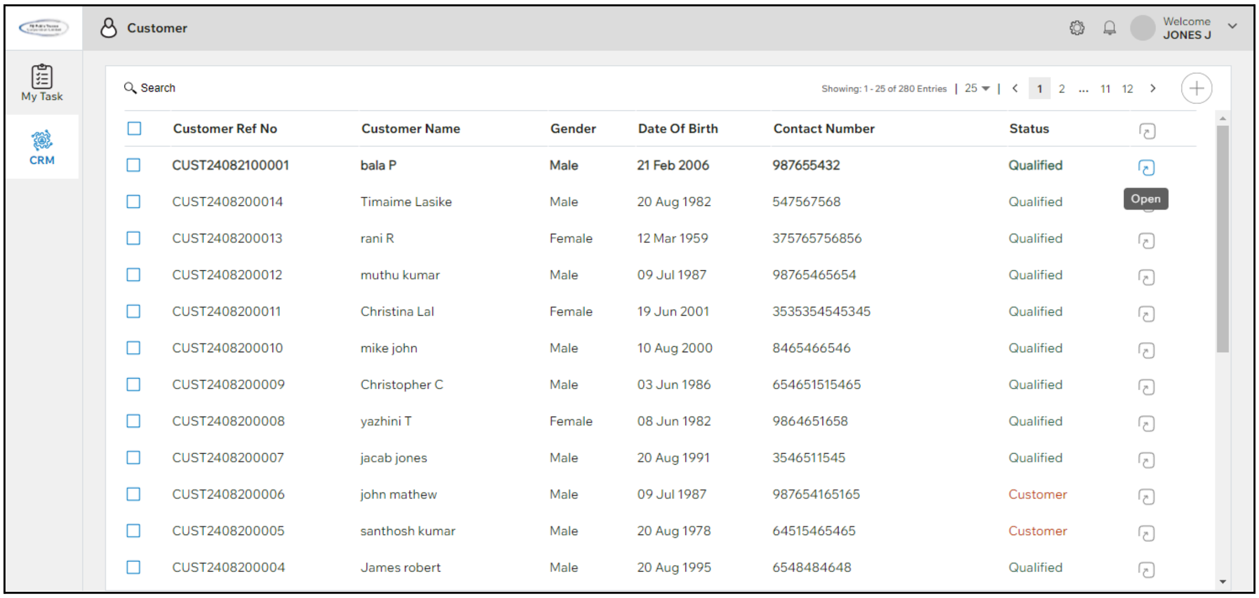
2. Enter/Select any of the fields among Customer Ref No, Customer Status, First name, Middle Name, Last Name, Gender, Date of Birth, Email Id, Contact Number, FNPF No, Driving License No, Voter ID, National ID, TIN No , Passport ID.



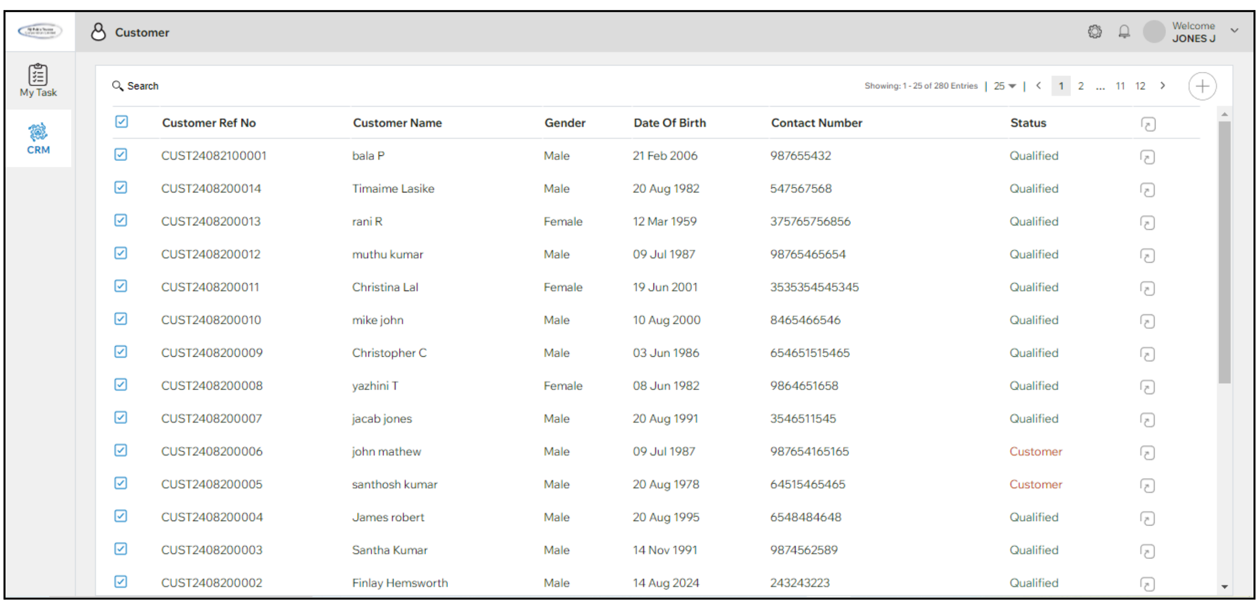
3. Click the **Search** icon on top of the pop up to get corresponding results.



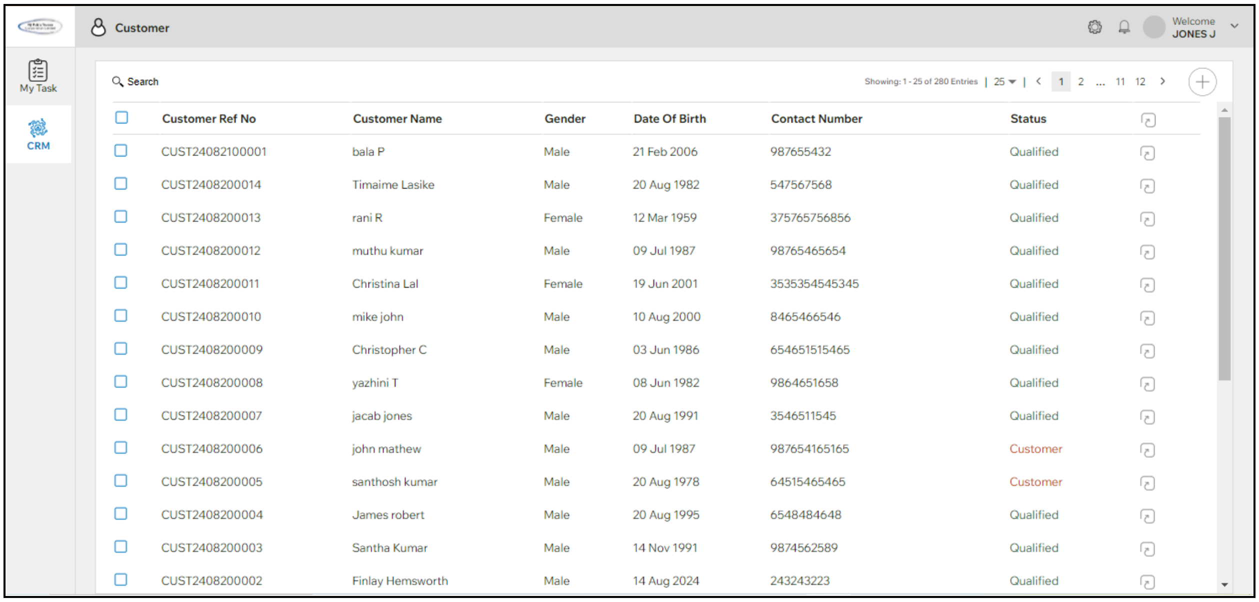
4. Click the **Clear** icon next to search icon to clear all the entered values in the fields.



5. Click the **Open** icon from the Grid to navigate to the Customer detail screen.

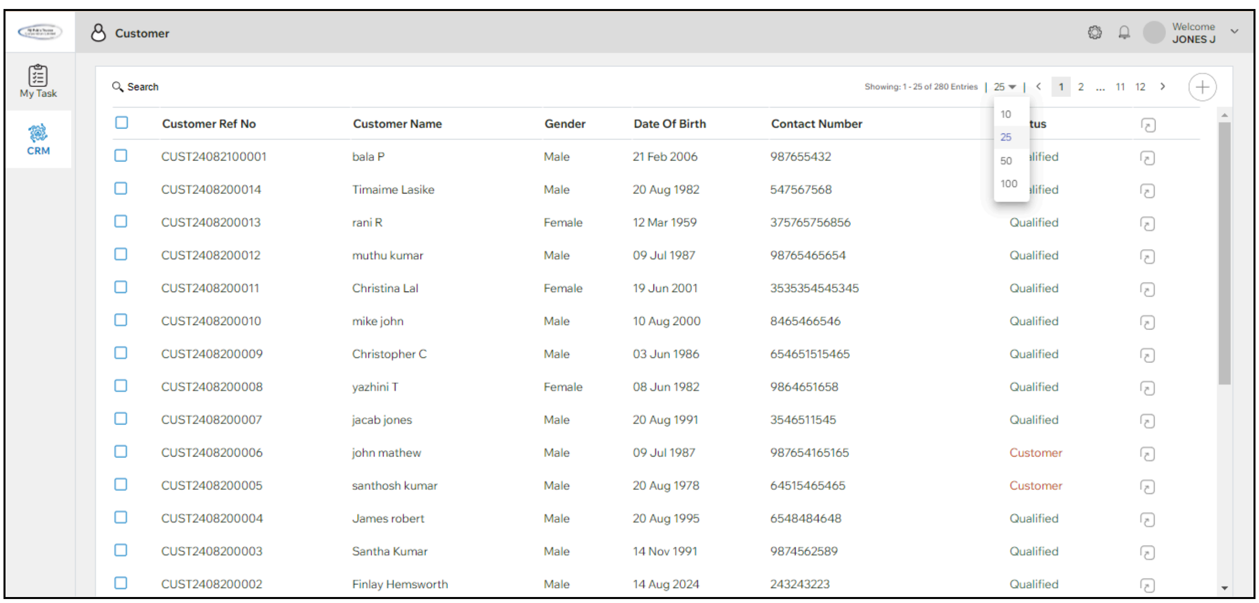


6. If want to open multiple details then click select all checkbox in the table header and click the **Open** icon in the table header.



Customer Ref No	Customer Name	Gender	Date Of Birth	Contact Number	Status
CUST24082100001	bala P	Male	21 Feb 2006	987655432	Qualified
CUST2408200014	Timaime Lasike	Male	20 Aug 1982	547567568	Qualified
CUST2408200013	rani R	Female	12 Mar 1959	375765756856	Qualified
CUST2408200012	muthu kumar	Male	09 Jul 1987	98765465654	Qualified
CUST2408200011	Christina Lal	Female	19 Jun 2001	3535354545345	Qualified
CUST2408200010	mike john	Male	10 Aug 2000	8465466546	Qualified
CUST2408200009	Christopher C	Male	03 Jun 1986	654651515465	Qualified
CUST2408200008	yazhini T	Female	08 Jun 1982	9864651658	Qualified
CUST2408200007	jacab jones	Male	20 Aug 1991	3546511545	Qualified
CUST2408200006	john mathew	Male	09 Jul 1987	987654165165	Customer
CUST2408200005	santhosh kumar	Male	20 Aug 1978	64515465465	Customer
CUST2408200004	James robert	Male	20 Aug 1995	6548484648	Qualified
CUST2408200003	Santha Kumar	Male	14 Nov 1991	9874562589	Qualified
CUST2408200002	Finlay Hemsworth	Male	14 Aug 2024	243243223	Qualified

7. Select the page number to directly go to that particular page.
8. Click the **>** button on the top right corner to navigate to the next page.
9. Click the **<** button on the top right corner to navigate to the previous page.



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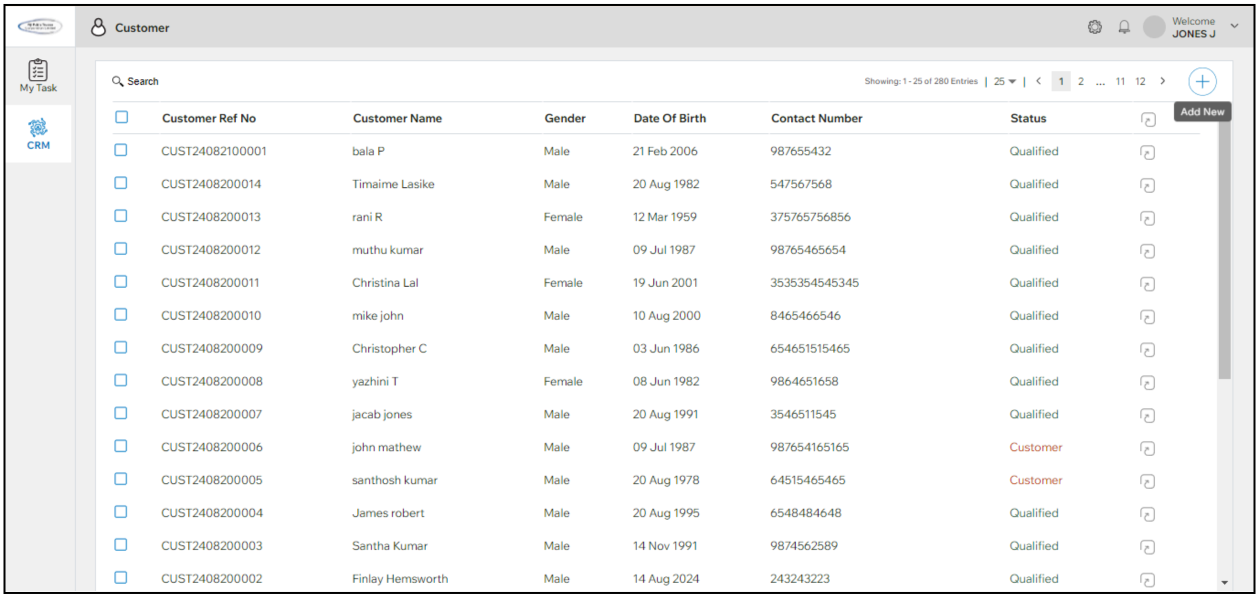
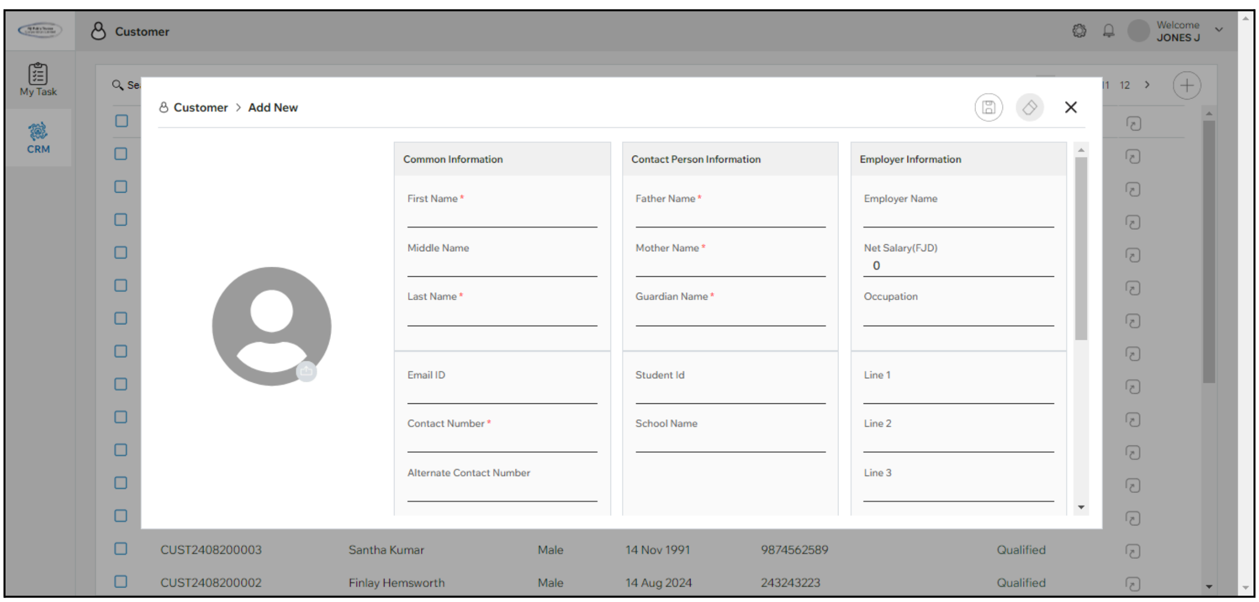
CUST2408200002	Finlay Hemsworth	Male	14 Aug 2024	243243223	Qualified

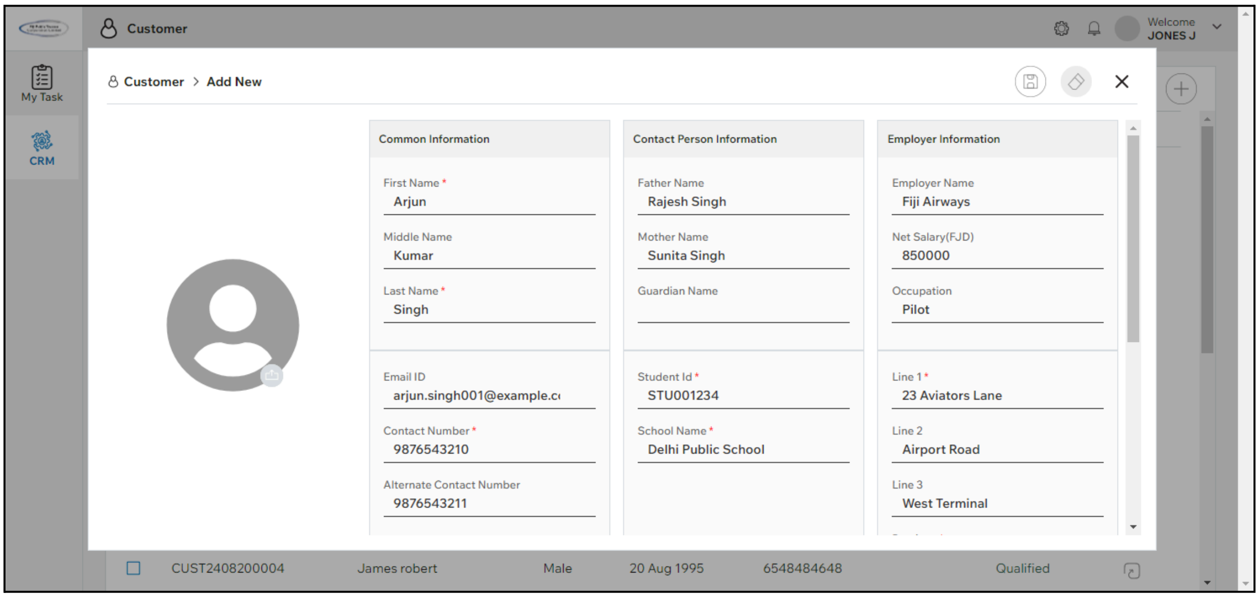
10. Select the Records count on the top right corner to show the required number of records per page.



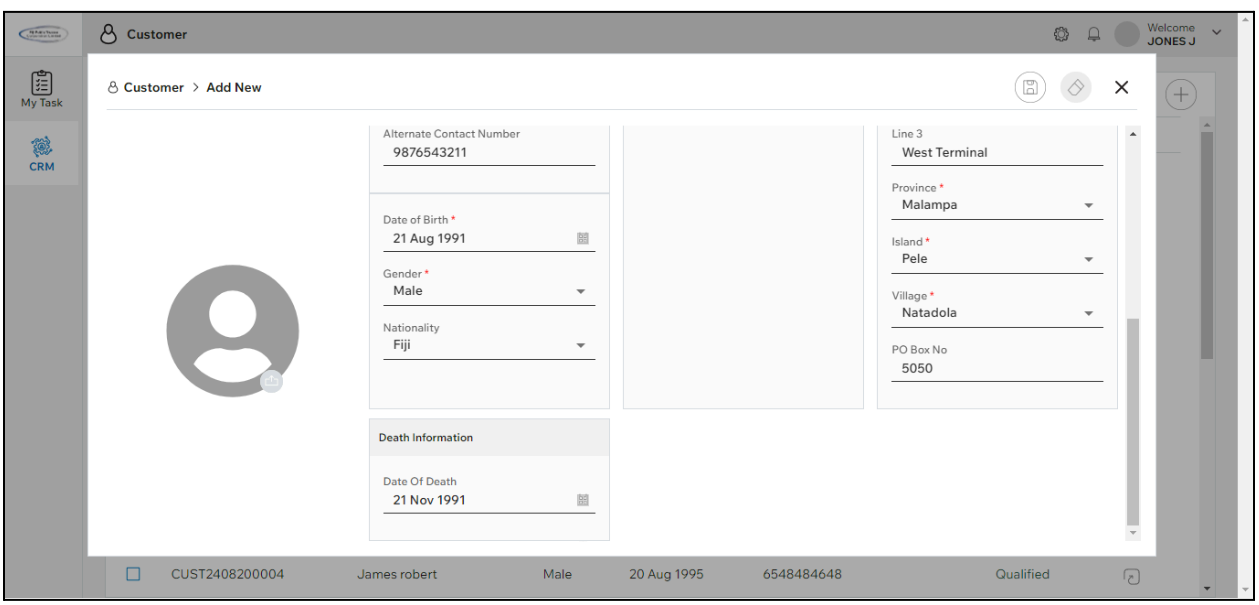
11. Click the **Add** icon, an Add New pop up will be displayed to add the customer details.



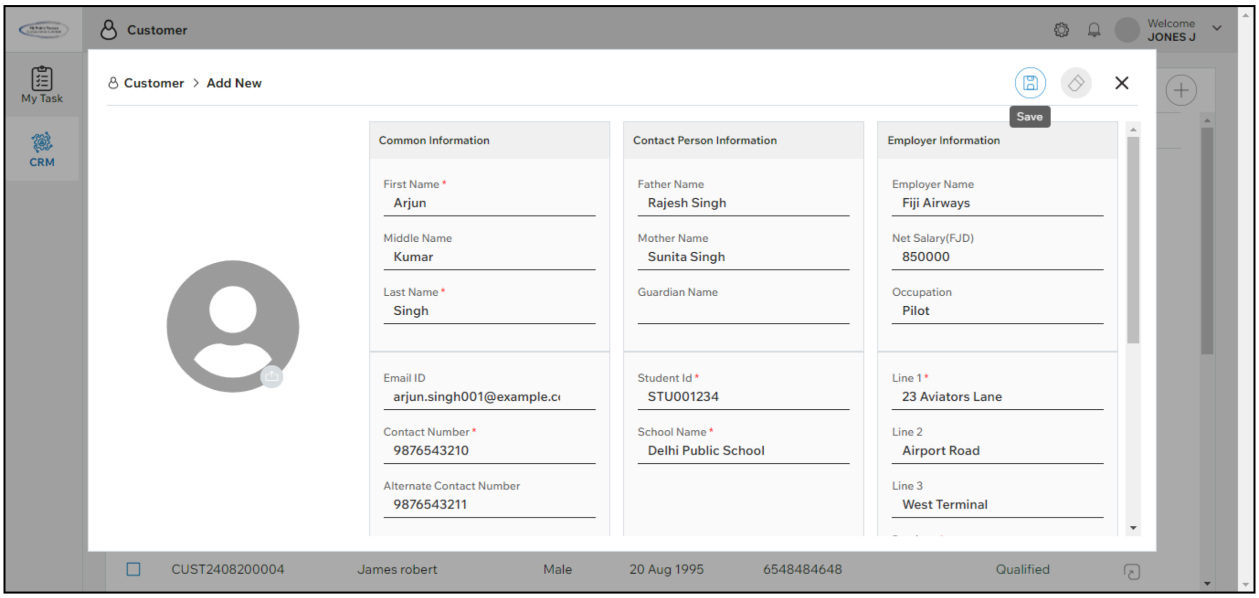
12. Enter/Select Common Information such as First Name, Middle Name, Last Name, Email id, Contact Number, Alternate Contact Number, Date of Birth, Gender, Nationality.



13. Select the Date of Death under Death Information.
14. Enter Contact Person Information such as Father Name, Mother Name, Guardian Name, Student Id, School Name.



15. Enter/Select Employer Information such as Employer Name, Net Salary, Occupation, Line 1, Line 2, Line 3, Province, Island, Village, PO Box No.
16. Click the **Upload** icon in the picture field to set a profile picture.
17. Click the **Save** icon on the top right corner in the pop up to save the customer details and to redirect to the customer detail screen.



18. Click the **Clear** icon to clear all the entered values in the fields.
19. Once the customer detail is saved the customer stage will be “Prospective”.

****END OF DOCUMENT*****