



## Fiji Public Trustee Corporation Limited CRM Module- User Manual



### 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**.

Customer Ref No	Customer Name	Gender	Date Of Birth	Contact Number	Status
CUST2408200013	rani R	Female	12 Mar 1959	375765756856	Qualified
CUST2408200012	muthu kumar	Male	09 Jul 1987	98765465654	Qualified
CUST2408200011	fsdd fdfdf	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

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

Customer Search

Customer Ref No

Customer Status  
--Select--

First Name

Middle Name

Last Name

Gender  
--Select--

Date of Birth

Email ID

Contact Number

FNPF No

Driving License No

Voter ID

National ID

TIN No

Passport ID

CUST2408200003	Santha Kumar	Male	14 Nov 1991	9874562589	Qualified
CUST2408200002	Finlay Hemsworth	Male	14 Aug 2024	243243223	Qualified



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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.

Customer Ref No	Customer Name	Gender	Date Of Birth	Contact Number	Status
CUST2408200003	Santha Kumar	Male	14 Nov 1991	9874562589	Qualified
CUST2408200002	Finlay Hemsworth	Male	14 Aug 2024	243243223	Qualified

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

Customer Ref No	Customer Name	Gender	Date Of Birth	Contact Number	Status
CUST2408200006	john mathew	Male	09 Jul 1987	987654165165	Customer



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

Customer

Showing: 1 - 25 of 280 Entries | 25 | < 1 2 ... 11 12 > (+)

<input type="checkbox"/>	Customer Ref No	Customer Name	Gender	Date Of Birth	Contact Number	Status	
<input type="checkbox"/>	CUST24082100001	bala P	Male	21 Feb 2006	987655432	Qualified	
<input type="checkbox"/>	CUST2408200014	Timaine Lasike	Male	20 Aug 1982	547567568	Qualified	
<input type="checkbox"/>	CUST2408200013	rani R	Female	12 Mar 1959	375765756856	Qualified	
<input type="checkbox"/>	CUST2408200012	muthu kumar	Male	09 Jul 1987	98765465654	Qualified	
<input type="checkbox"/>	CUST2408200011	Christina Lal	Female	19 Jun 2001	3535354545345	Qualified	
<input type="checkbox"/>	CUST2408200010	mike john	Male	10 Aug 2000	8465466546	Qualified	
<input type="checkbox"/>	CUST2408200009	Christopher C	Male	03 Jun 1986	654651515465	Qualified	
<input type="checkbox"/>	CUST2408200008	yazhini T	Female	08 Jun 1982	9864651658	Qualified	
<input type="checkbox"/>	CUST2408200007	jacab jones	Male	20 Aug 1991	3546511545	Qualified	
<input type="checkbox"/>	CUST2408200006	john mathew	Male	09 Jul 1987	987654165165	Customer	
<input type="checkbox"/>	CUST2408200005	santhosh kumar	Male	20 Aug 1978	64515465465	Customer	
<input type="checkbox"/>	CUST2408200004	James robert	Male	20 Aug 1995	6548484648	Qualified	

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

Customer

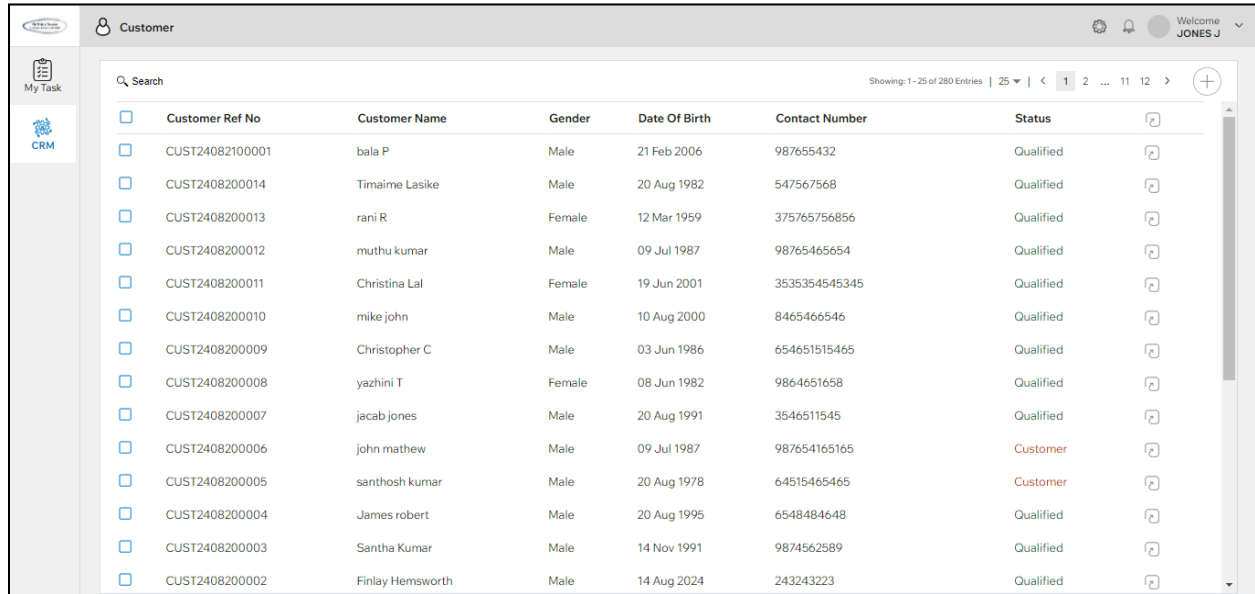
Showing: 1 - 25 of 280 Entries | 25 | < 1 2 ... 11 12 > (+)

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

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.



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



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




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Customer							Welcome JONES J
My Task	Search						Showing: 1 - 25 of 280 Entries   25   < 1 2 ... 11 12 > +
CRM	<input type="checkbox"/>	Customer Ref No	Customer Name	Gender	Date Of Birth	Contact Number	Status
	<input type="checkbox"/>	CUST24082100001	bala P	Male	21 Feb 2006	987655432	Qualified
	<input type="checkbox"/>	CUST2408200014	Timaine Lasike	Male	20 Aug 1982	547567568	Qualified
	<input type="checkbox"/>	CUST2408200013	rani R	Female	12 Mar 1959	375765756856	Qualified
	<input type="checkbox"/>	CUST2408200012	muthu kumar	Male	09 Jul 1987	98765465654	Qualified
	<input type="checkbox"/>	CUST2408200011	Christina Lal	Female	19 Jun 2001	3535354545345	Qualified
	<input type="checkbox"/>	CUST2408200010	mike john	Male	10 Aug 2000	8465466546	Qualified
	<input type="checkbox"/>	CUST2408200009	Christopher C	Male	03 Jun 1986	654651515465	Qualified
	<input type="checkbox"/>	CUST2408200008	yazhini T	Female	08 Jun 1982	9864651658	Qualified
	<input type="checkbox"/>	CUST2408200007	jacab jones	Male	20 Aug 1991	3546511545	Qualified
	<input type="checkbox"/>	CUST2408200006	john mathew	Male	09 Jul 1987	987654165165	Customer
	<input type="checkbox"/>	CUST2408200005	santhosh kumar	Male	20 Aug 1978	64515465465	Customer
	<input type="checkbox"/>	CUST2408200004	James robert	Male	20 Aug 1995	6548484648	Qualified
	<input type="checkbox"/>	CUST2408200003	Santha Kumar	Male	14 Nov 1991	9874562589	Qualified
	<input type="checkbox"/>	CUST2408200002	Finlay Hemsworth	Male	14 Aug 2024	243243223	Qualified

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

Customer							Welcome JONES J
My Task	Search						Showing: 1 - 25 of 280 Entries   25   < 1 2 ... 11 12 > +
CRM	Customer > Add New						
	<div><div></div><div><div>Common Information</div><div><div>First Name *</div><div>Middle Name</div><div>Last Name *</div><div>Email ID</div><div>Contact Number *</div><div>Alternate Contact Number</div></div></div><div><div>Contact Person Information</div><div><div>Father Name *</div><div>Mother Name *</div><div>Guardian Name *</div><div>Student id</div><div>School Name</div></div></div><div><div>Employer Information</div><div><div>Employer Name</div><div>Net Salary(FJD) 0</div><div>Occupation</div><div>Line 1</div><div>Line 2</div><div>Line 3</div></div></div></div>						
	<input type="checkbox"/>	CUST2408200003	Santha Kumar	Male	14 Nov 1991	9874562589	Qualified
	<input type="checkbox"/>	CUST2408200002	Finlay Hemsworth	Male	14 Aug 2024	243243223	Qualified



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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.

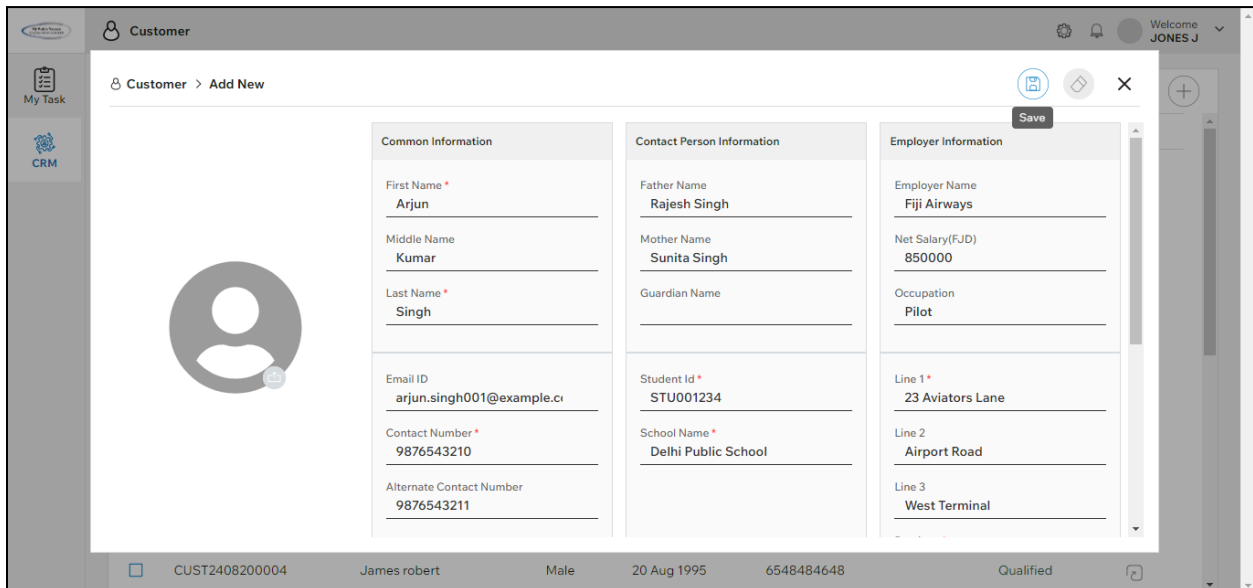
The screenshot shows the 'Add New' form for a customer. The form is divided into three main sections: Common Information, Contact Person Information, and Employer Information. The Common Information section includes fields for First Name (Arjun), Middle Name (Kumar), Last Name (Singh), Email ID (arjun.singh001@example.ci), Contact Number (9876543210), and Alternate Contact Number (9876543211). The Contact Person Information section includes fields for Father Name (Rajesh Singh), Mother Name (Sunita Singh), Guardian Name, Student Id (STU001234), and School Name (Delhi Public School). The Employer Information section includes fields for Employer Name (Fiji Airways), Net Salary(FJD) (850000), Occupation (Pilot), and three address lines (Line 1: 23 Aviators Lane, Line 2: Airport Road, Line 3: West Terminal). The form also includes a profile picture placeholder and a status bar at the bottom with the following details: CUST2408200004, James robert, Male, 20 Aug 1995, 6548484648, Qualified.

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.

The screenshot shows the 'Add New' form for a customer, focusing on the Death Information and Contact Person Information sections. The Death Information section includes a field for Date Of Death (21 Nov 1991). The Contact Person Information section includes fields for Father Name, Mother Name, Guardian Name, Student Id, and School Name. The form also includes a profile picture placeholder and a status bar at the bottom with the following details: CUST2408200004, James robert, Male, 20 Aug 1995, 6548484648, Qualified.

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.



Common Information		Contact Person Information		Employer Information	
First Name *	Arjun	Father Name	Rajesh Singh	Employer Name	Fiji Airways
Middle Name	Kumar	Mother Name	Sunita Singh	Net Salary(FJD)	850000
Last Name *	Singh	Guardian Name		Occupation	Pilot
Email ID	arjun.singh001@example.ci	Student Id *	STU001234	Line 1 *	23 Aviators Lane
Contact Number *	9876543210	School Name *	Delhi Public School	Line 2	Airport Road
Alternate Contact Number	9876543211			Line 3	West Terminal

Summary: CUST2408200004 | James robert | Male | 20 Aug 1995 | 6548484648 | Qualified

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\*\***