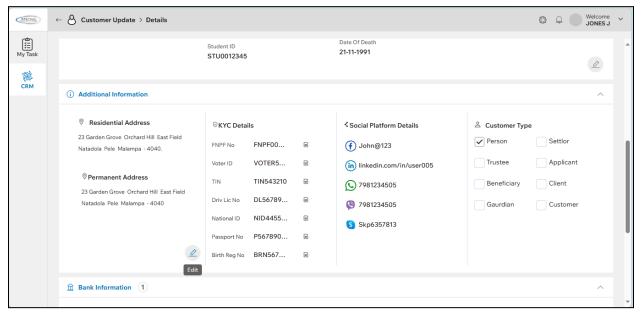## Customer Update Detail

User : Customer Creation Officer

This screen allows the Customer Update Officer to view and modify the details of customers that have already been added in the customer screen.

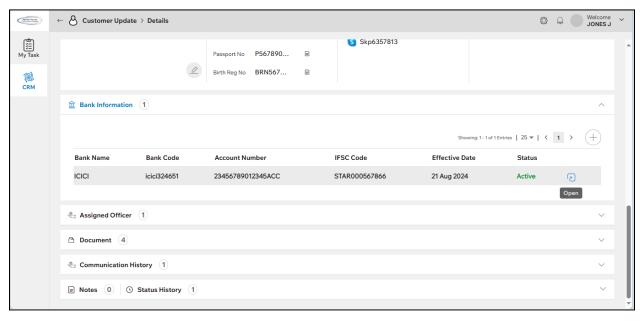1. To edit the additional information, click the Edit button in the Customer , Employer, Additional Information panel.
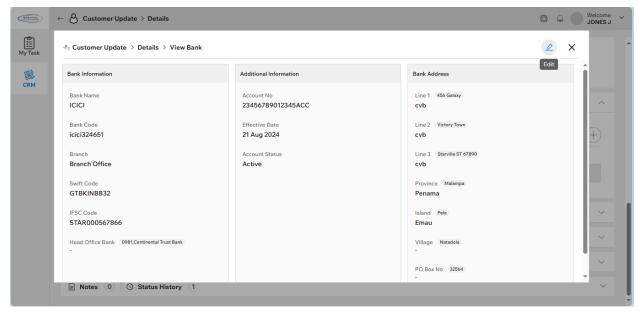

2. After making the necessary changes, click the **Save** button to update the details.
3. Click the **Refresh** button to restore the previous values.
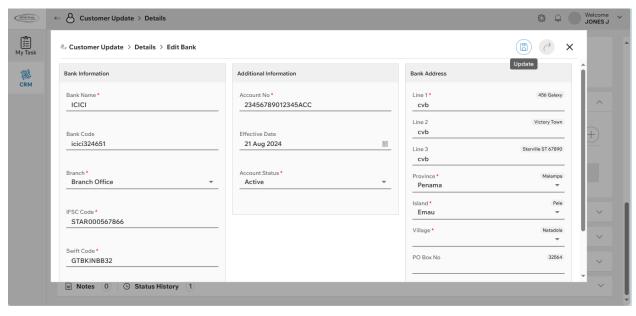4. Click the **Open** button below the bank information tab to navigate the customer update details view bank popup.

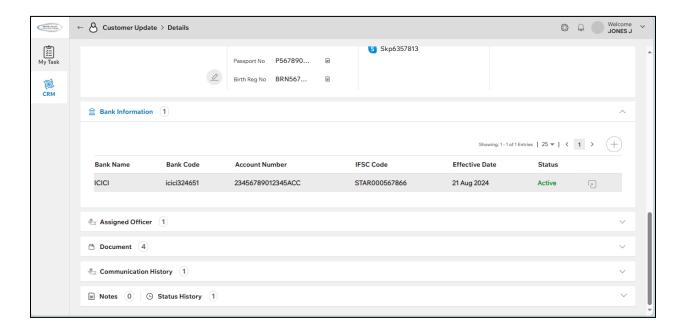5. Click the **Edit** button to edit the bank information tab.

6. Click the **Update** button to save the changes.

7. Click the **Refresh** button to restore the previous values.
8. Click the **Close** icon to close the panel.
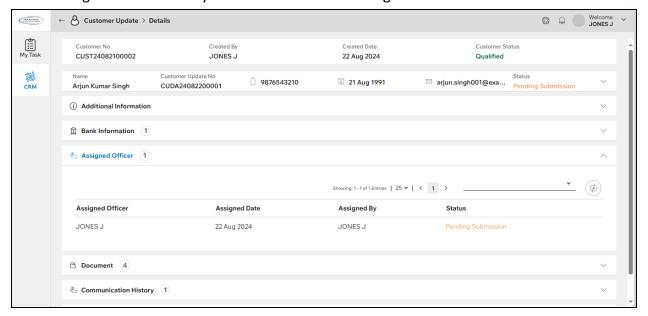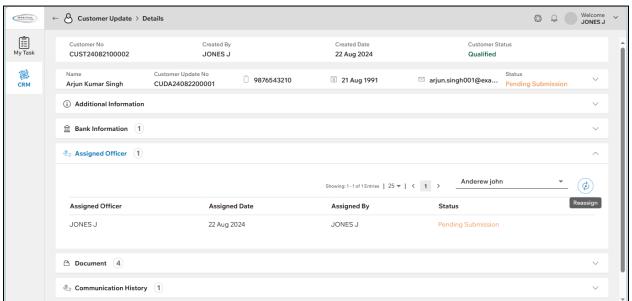9. The saved bank information will be displayed in the bank information grid.

Assigned Officer :

1. Assigned officer history based on each status change will be maintained in this tab.

2. Officers can be reassigned to any other officer in the same group. To Reassign, select the Officer Name and click the Re Assign button.
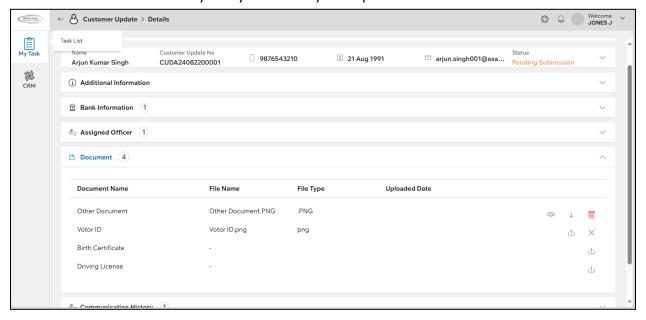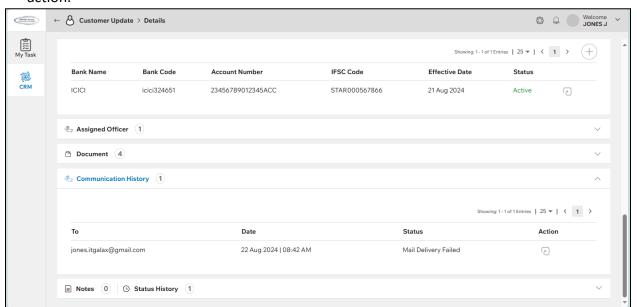
Upload Document:

1. Click the Select button below the document tab.
2. Select the file from your system library and upload the document.

Communication History:

1. In this tab, the email log will be displayed with the recipient, date & time, status, and action.
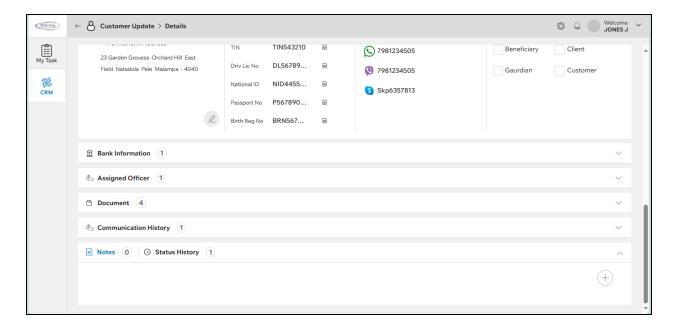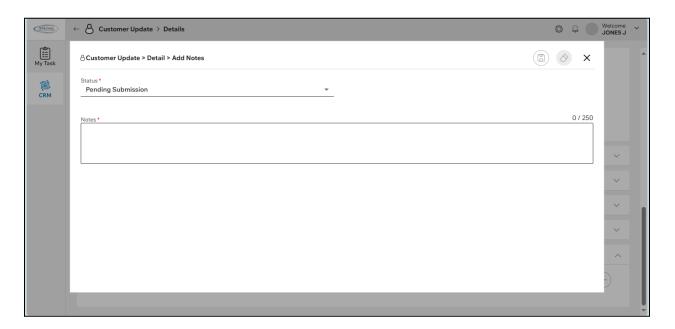
Notes:

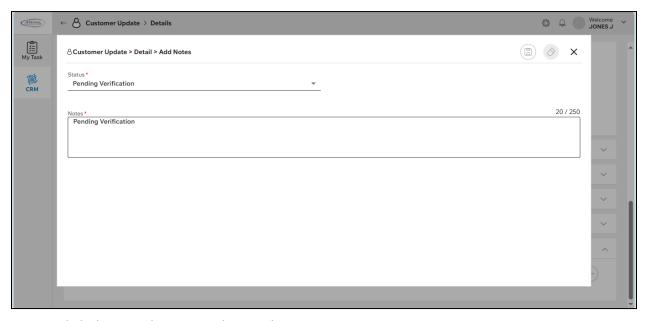1. Click the **Add** button below the notes tab.

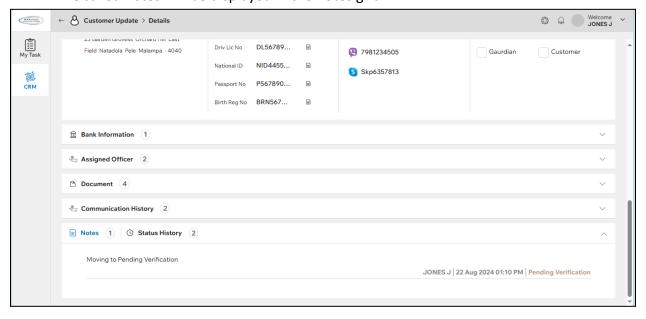2. Click on Add button , to navigate to the Customer Update add notes pop-up screen.

3. Select **Status** and enter **Notes** .

4. Click the **Save** button to change the status.
5. Click the **Clear** button next to save button to remove all entered or selected details.
6. Click the **Close** icon to close the panel.
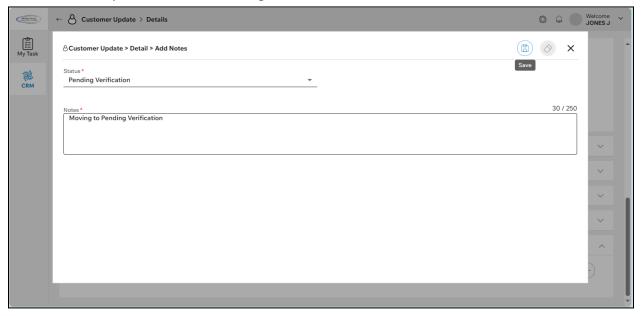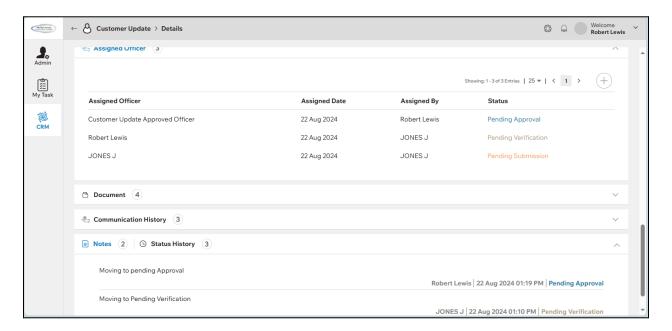7. The saved notes will be displayed in the notes grid.

Approval Process:

This screen also includes a process of approval. The steps involved are:

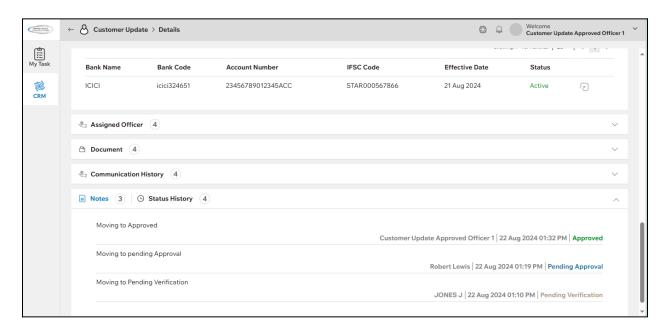1. Customer Update Officer:
    - Update status to Pending Verification.

2. Customer Update Verification Officer:
    - Update status to Pending Approval.
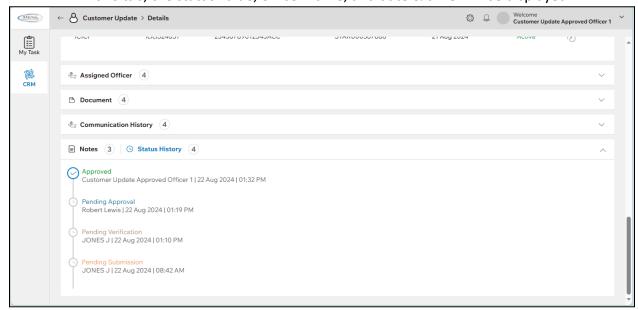
3. Customer Update Approval Officer:
   ○ Update status to Approved.

Status History:

1. In this tab, the status value, officer name, and date & time will be displayed.

END OF DOCUMENT*