

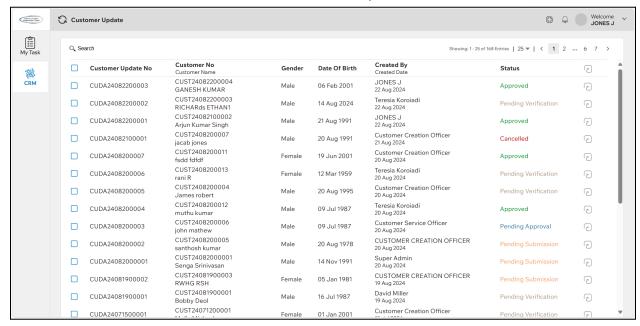
### Fiji Public Trustee Corporation Limited CRM Module- User Manual



### **Customer Update**

#### **User: Customer Creation Officer**

This screen helps you view and search for customer update details. To navigate to this screen, click on the CRM from the menu and select Customer Update.

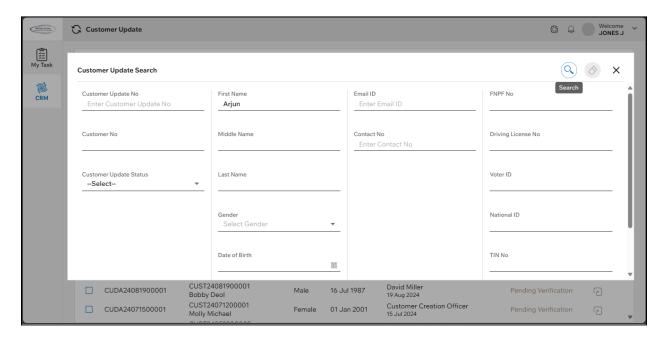


- 1. Click on Search to open the search criteria panel.
- 2. Enter the search criteria, such as Basic Information: Customer No, Customer Status, First Name, Middle Name, Last Name, Gender, Date of Birth. Contact Information:Email ID, Contact No. and KYC Detail: FNPF No, Driving License No, Voter ID, National ID, TIN No, Passport No.2

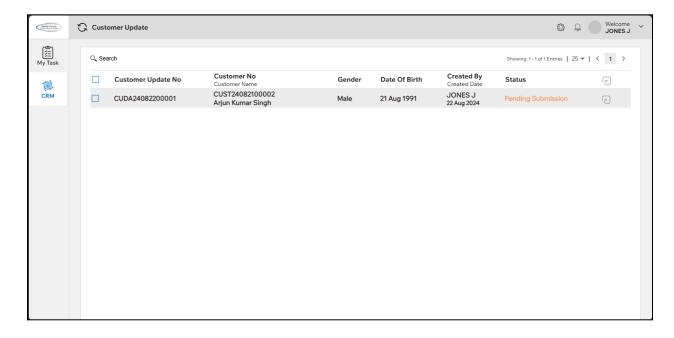


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3. Click the **Search** button to display the search results in the customer grid.



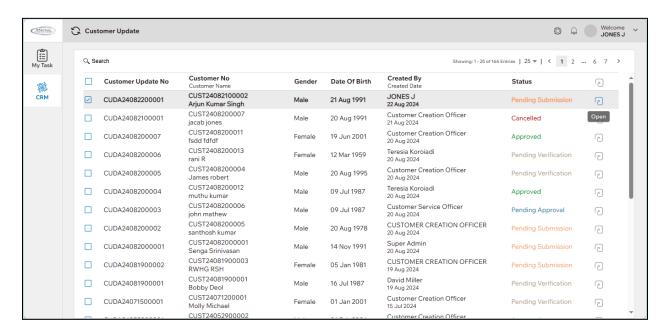
- 4. Click the **Clear** button to remove all entered or selected details and navigate to the customer update search screen.
- 5. Click the **Close** icon to close the search panel.



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6. To navigate to the customer update details, click on the check box and click the open of the search grid.



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