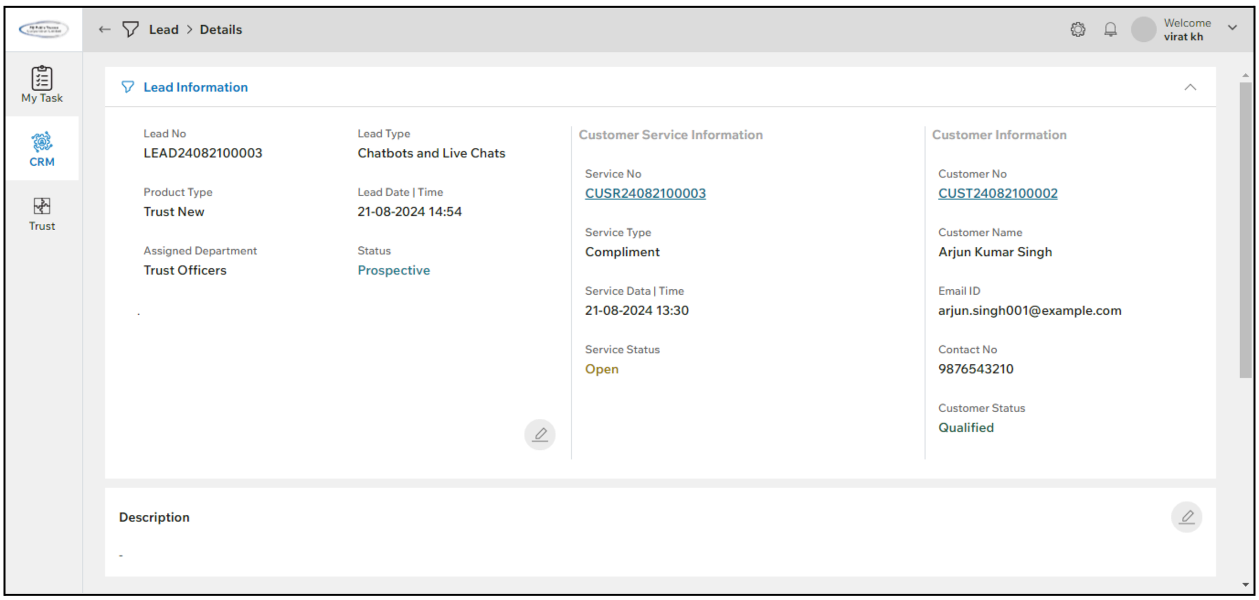
Lead detail

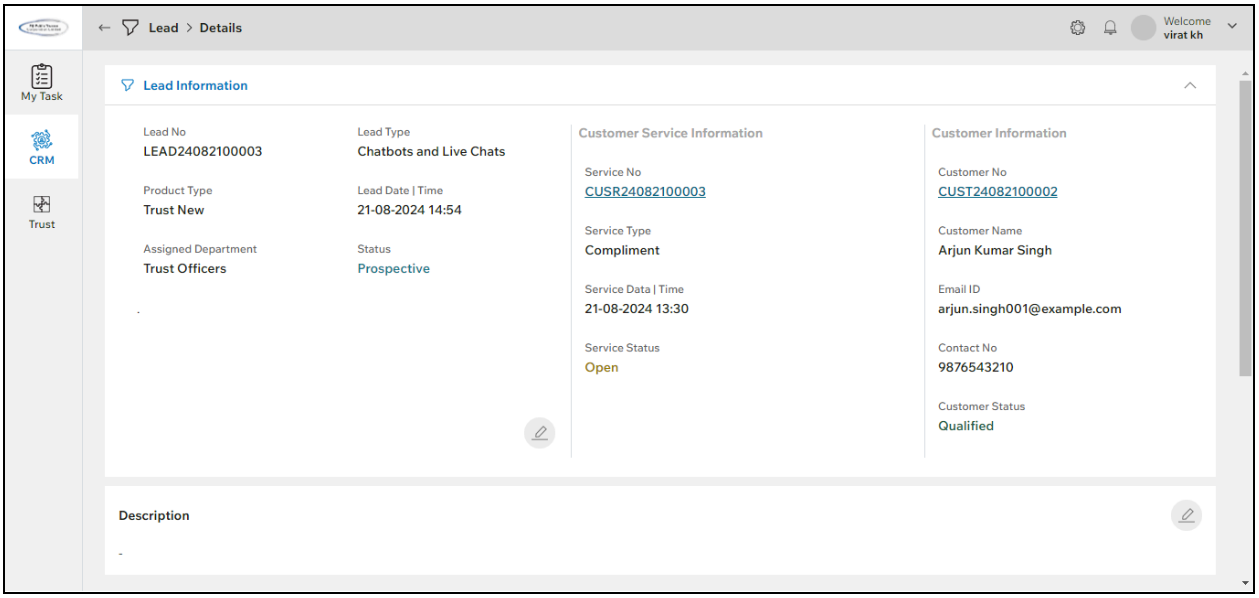
User : Customer Creation Officer

This screen helps to Create lead for the customer below the customer service . To navigate to this screen click on the **CRM** from the menu and click **lead Detail**.

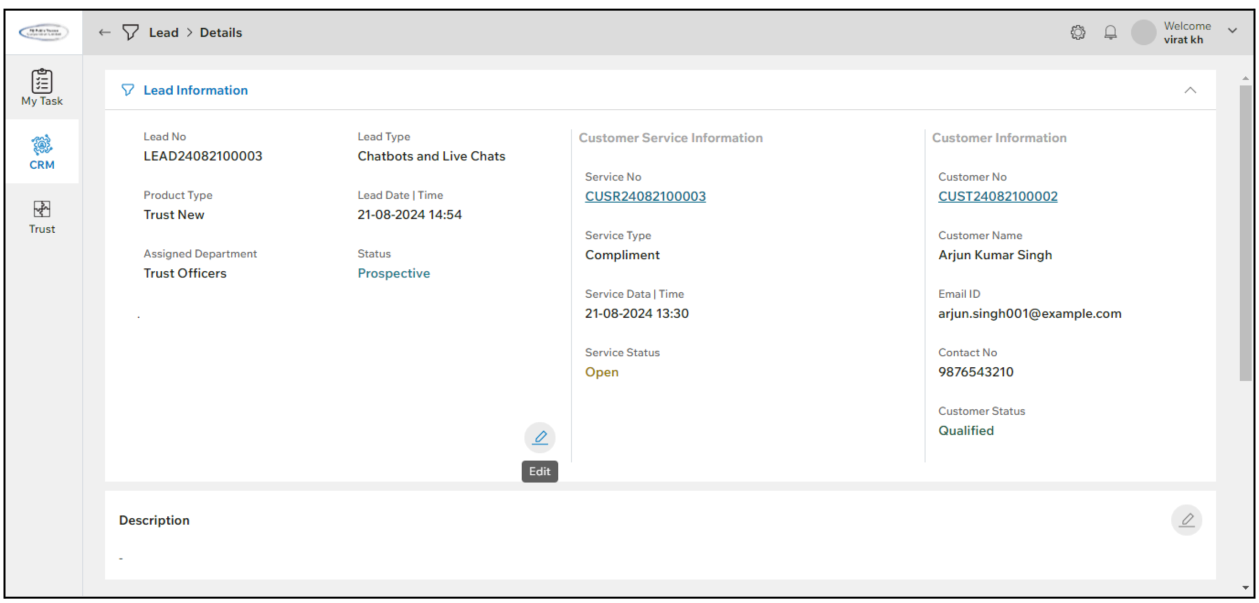
1. Upon saving the lead details from customer service screen, Initially the lead information that we have saved in the customer service screen will display.



2. On the right panel customer service and customer information with their status of application will display.

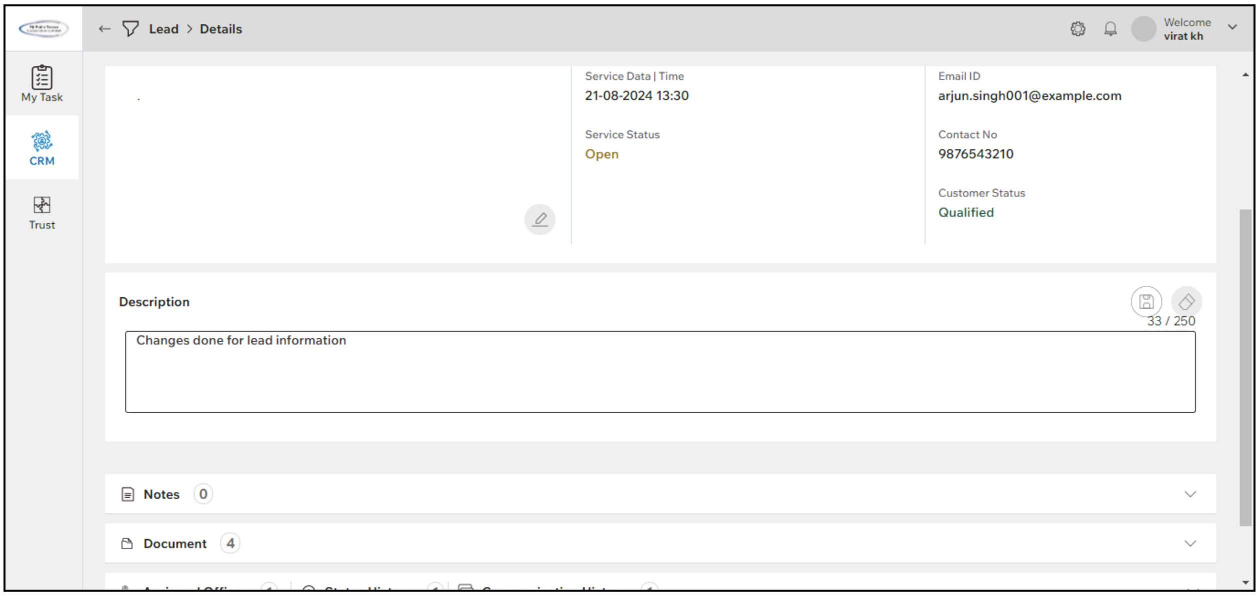


3. To edit lead information, Click on the **Edit** button.



4. Click the **Update** button to save the changes.
5. Click the **Refresh** button to restore the previous values

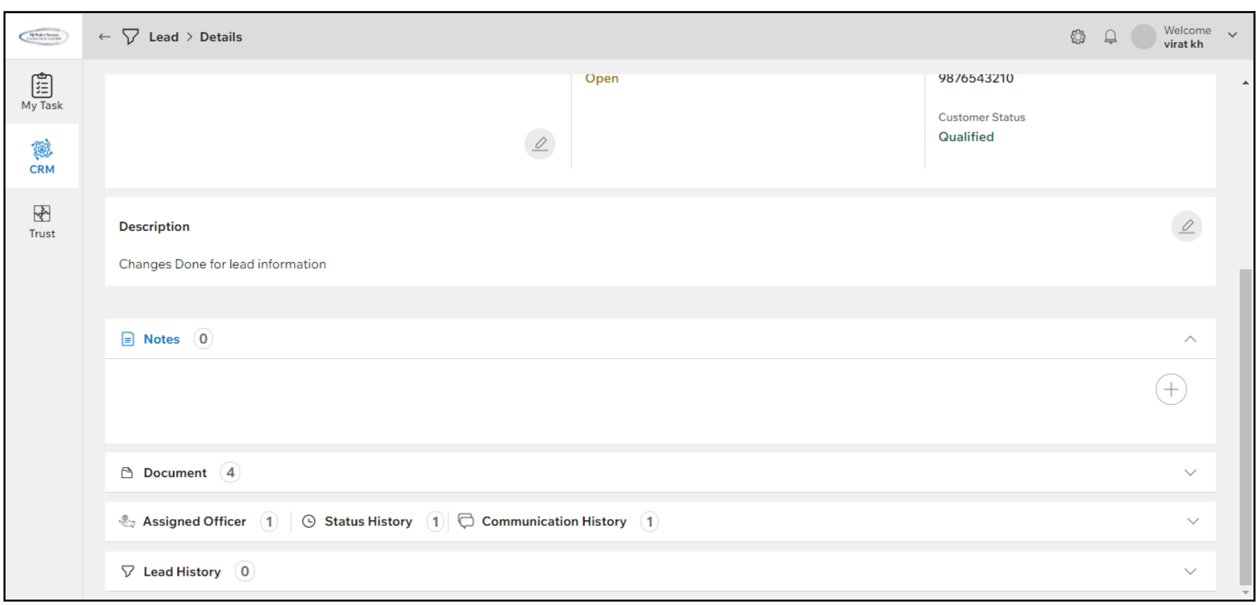
6. click the **Edit** button, enter the service description.



7. Click the **Save** button to save the details.
8. Click the **Clear** button to undo the selection.

Notes:

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

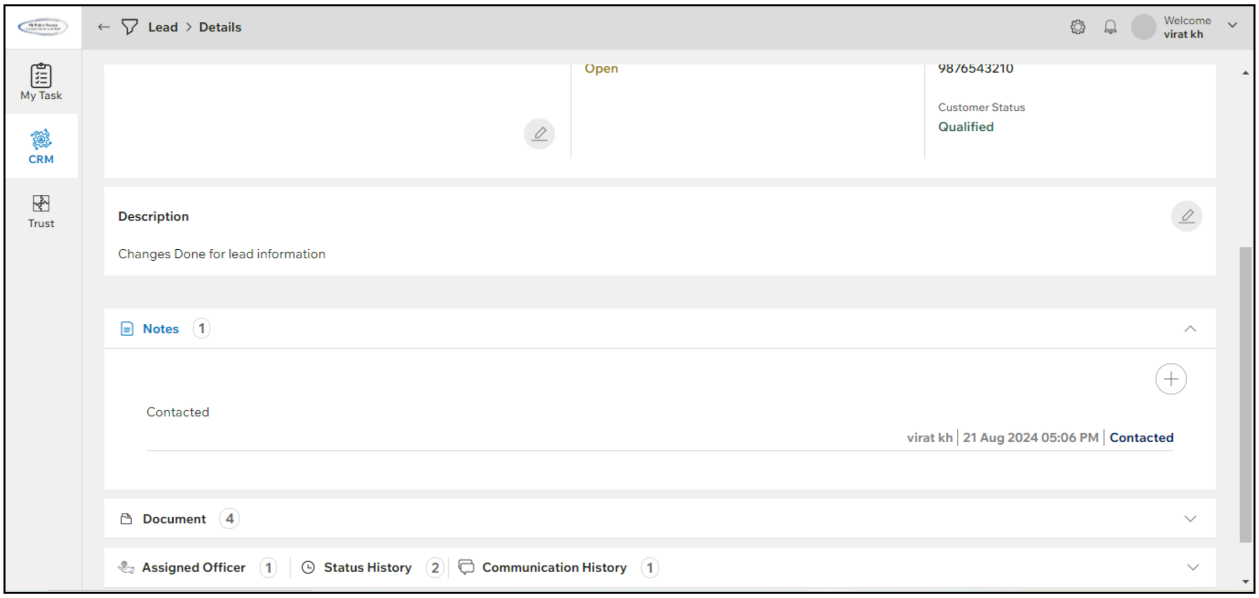


2. Click on **Add** button, Lead detail add notes popup will display..

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

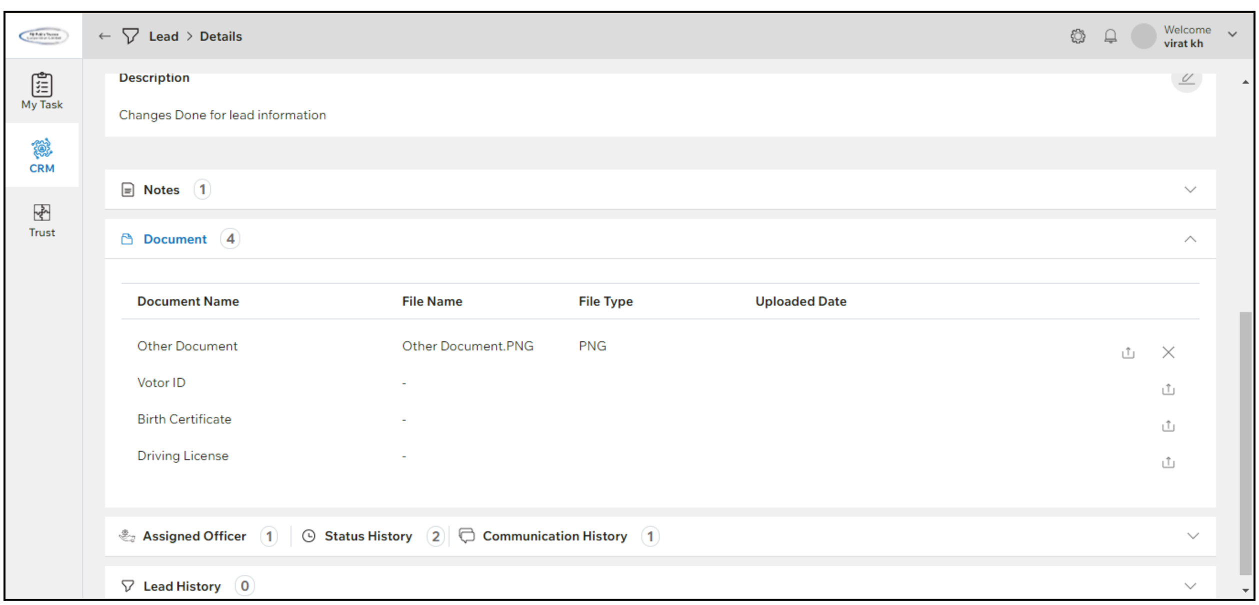
4. Click the **Save** button to save the entered details.
5. Click the **Clear** button next to save button to remove all entered or selected details.
6. Click the **Close** icon to close the panel.

7. The saved notes will be displayed in the notes grid.



Upload Document:

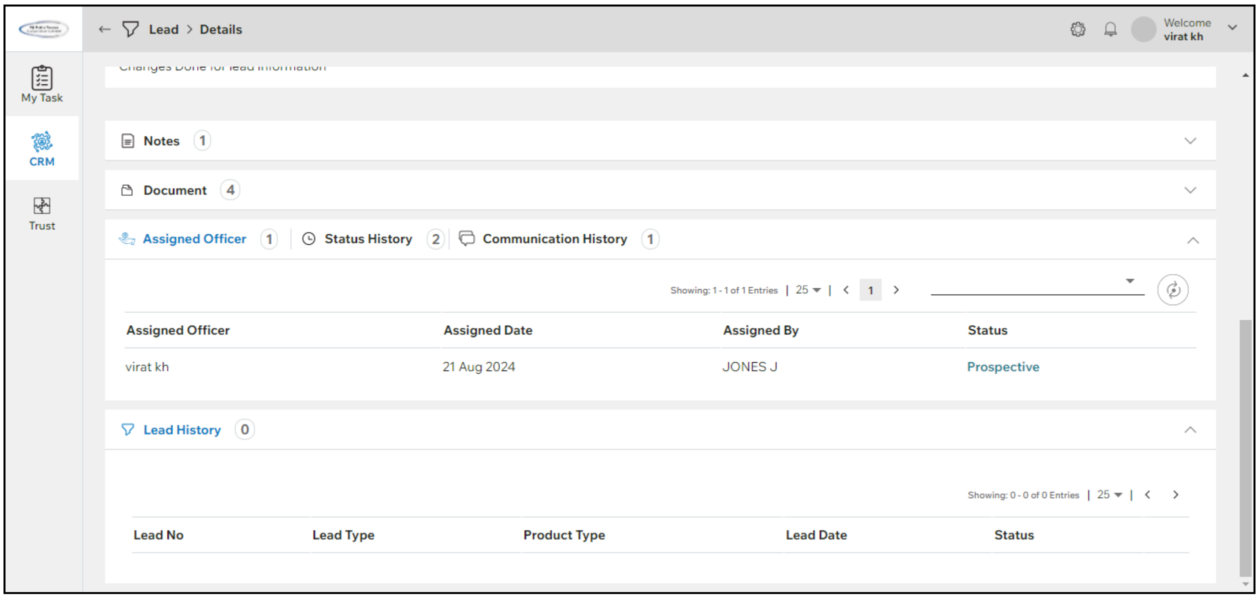
1. Click the **Select** button below the document tab.



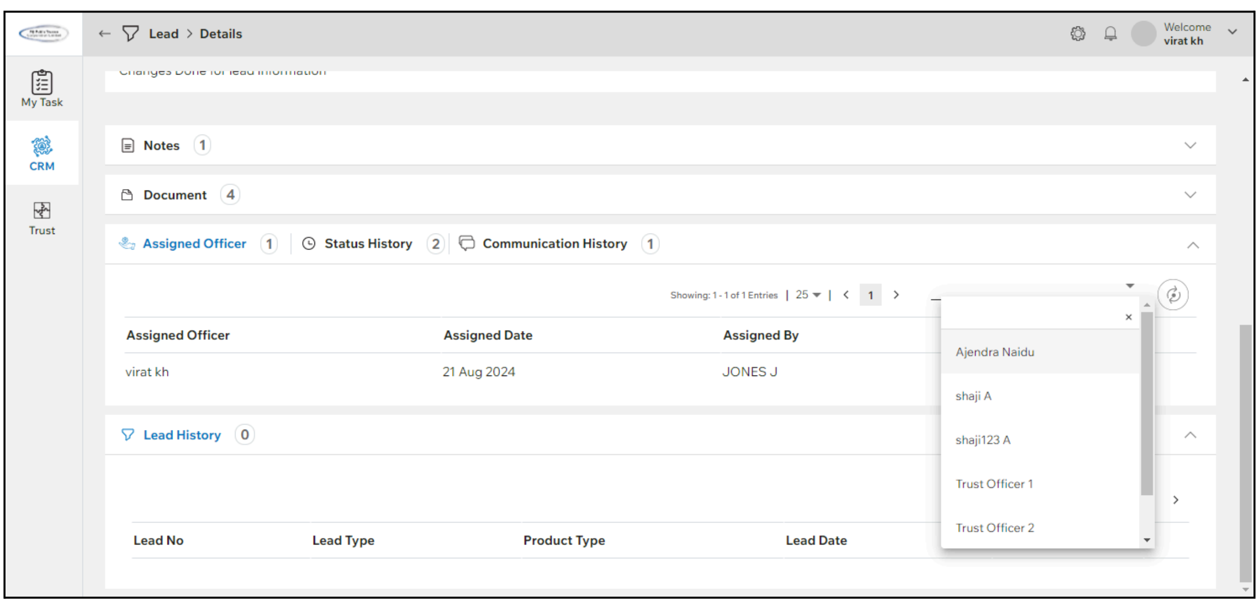
2. Select the file from your system library and upload the document.

Assigned Officer :

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

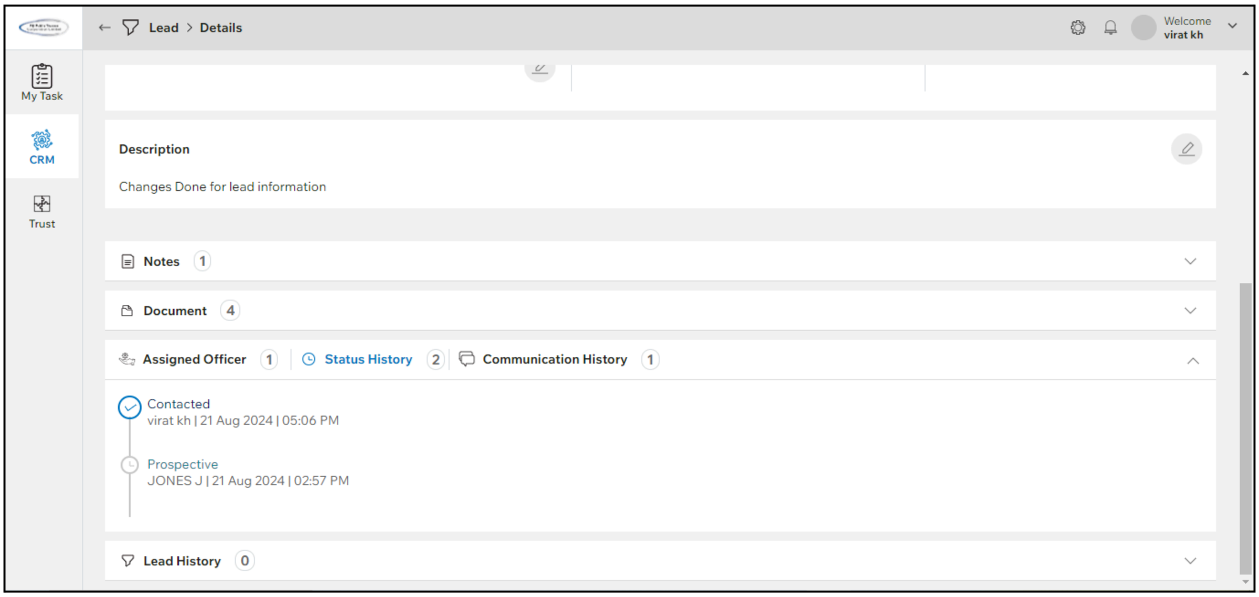


2. Officers can be reassigned to any other officer in the same group. To Reassign, select the Officer Name and click the Re Assign button.



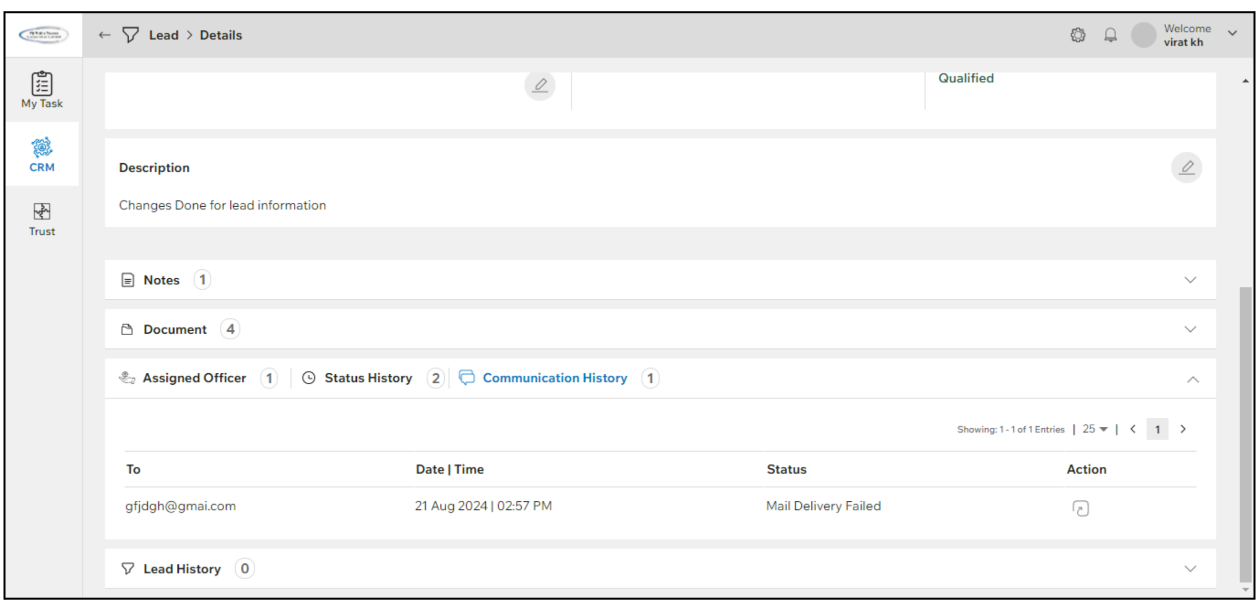
Status History:

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



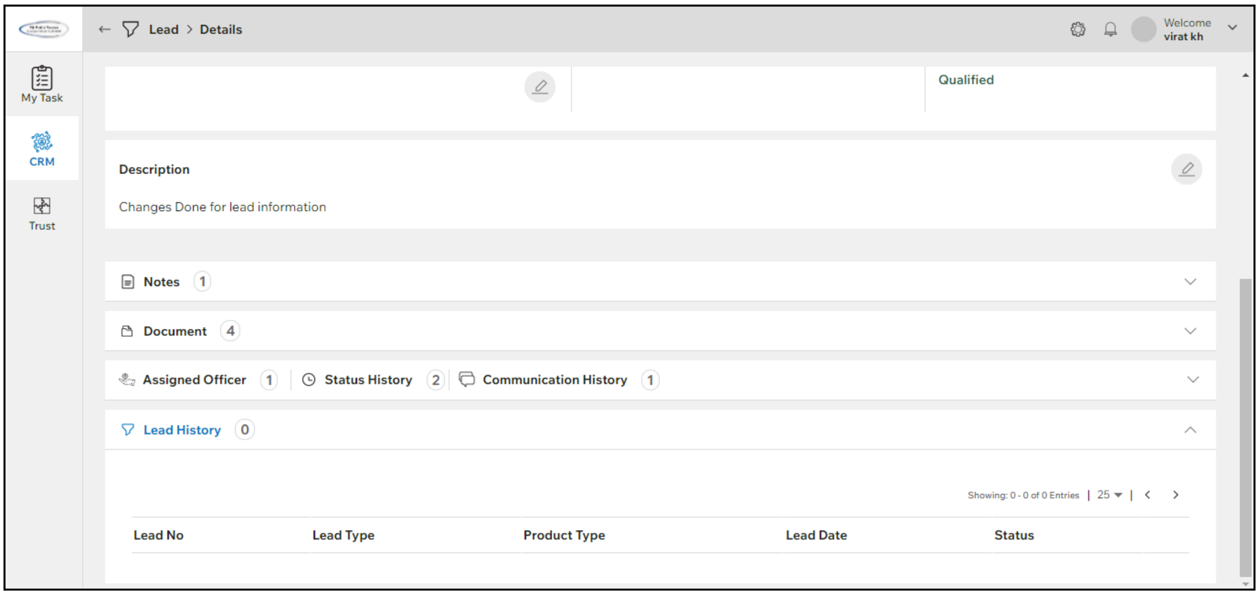
Communication History:

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



Lead History:

1. This tab contains details of all services availed by the customer.



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