



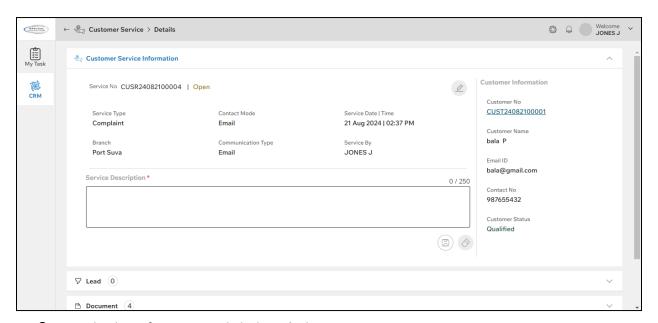
Customer Service Detail

User: Customer Creation Officer

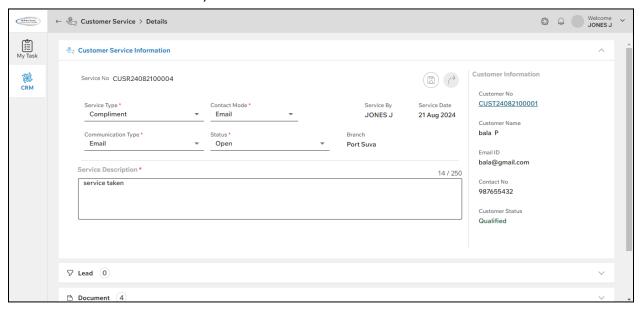
This screen helps you view detailed information about customer services. Customer information will be displayed in the right corner.

Customer Service Information:

1. Service info wil be displayed at the top.



2. To edit the information, click the Edit button.



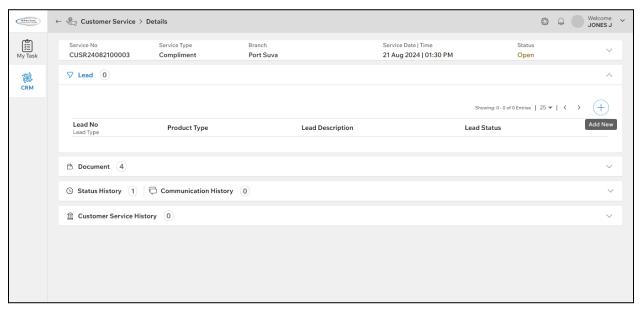




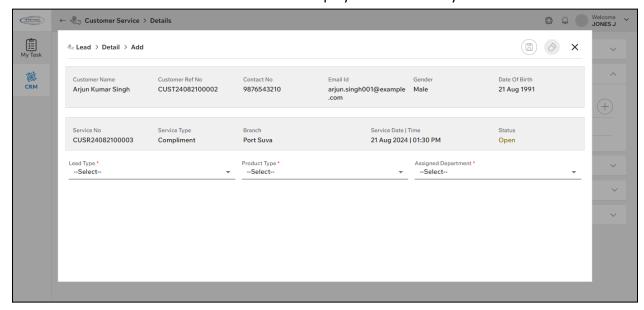
- 3. Make the changes needed and Click the **Update** button to save the changes.
- 4. Click the **Refresh** button to restore the previous values.

Lead:

1. Click the **Add** button below the Lead tab to display the Lead Detail Add popup.



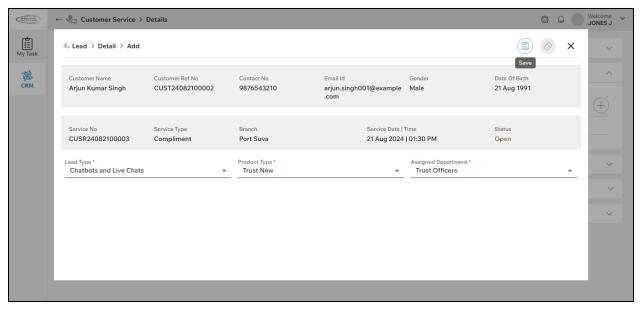
2. Customer info and service info will be displayed automatically.







3. Select the lead details such as lead type, product type, and assigned department, then click the **Save** button.



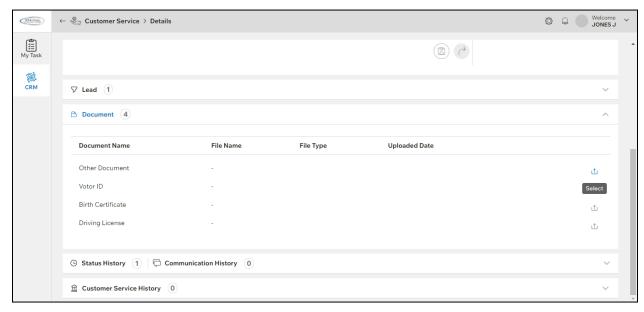
- 4. Click the Clear button next to save button to remove all entered details.
- 5. Click the **Close** button to exit the popup.
- 6. Upon saving the lead details, the screen will redirect to the lead information screen.

Upload Document:

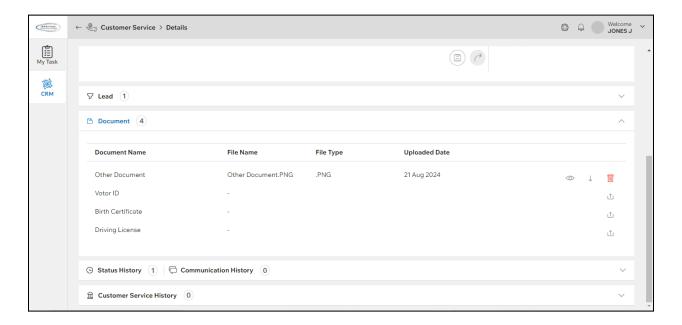
1. Click the **Select** button below the document tab.







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

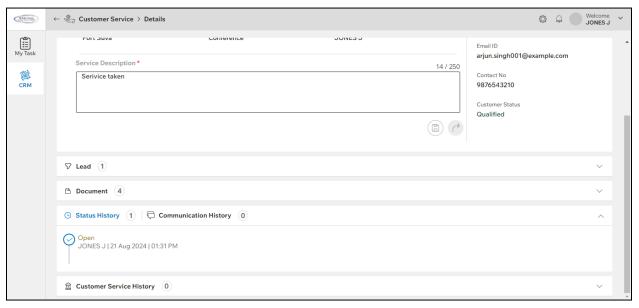


Status History:

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

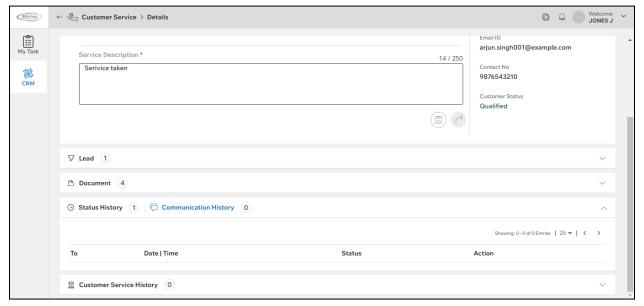






Communication History:

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

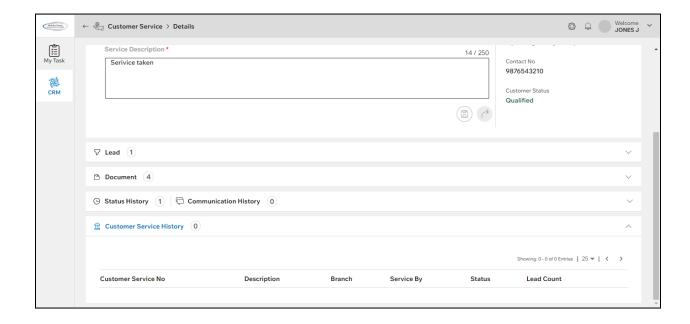


Customer Service History:

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







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