



Fiji Public Trustee Corporation Limited CRM Module- User Manual



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 will be displayed at the top.

Customer Service > Details

Customer Service Information

Service No CUSR24082100004 | Open

Service Type: Complaint, Contact Mode: Email, Service Date | Time: 21 Aug 2024 | 02:37 PM, Branch: Port Suva, Communication Type: Email, Service By: JONES J

Service Description * 0 / 250

Customer Information

Customer No: CUST24082100001, Customer Name: bala P, Email ID: bala@gmail.com, Contact No: 987655432, Customer Status: Qualified

Lead 0, Document 4

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

Customer Service > Details

Customer Service Information

Service No CUSR24082100004

Service Type * Complaint, Contact Mode * Email, Service By: JONES J, Service Date: 21 Aug 2024, Branch: Port Suva, Communication Type * Email, Status * Open

Service Description * 14 / 250

Customer Information

Customer No: CUST24082100001, Customer Name: bala P, Email ID: bala@gmail.com, Contact No: 987655432, Customer Status: Qualified

Lead 0, Document 4



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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.

The screenshot shows the 'Customer Service > Details' page. The 'Lead' tab is selected, showing a table with columns: Lead No, Product Type, Lead Description, and Lead Status. The table is currently empty, with a message 'Showing: 0 - 0 of 0 Entries | 25' and an 'Add New' button. Other tabs like Document, Status History, Communication History, and Customer Service History are visible below the Lead tab.

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

The screenshot shows the 'Lead > Detail > Add' popup form. It contains two sections: Customer Info and Service Info. The Customer Info section includes fields for Customer Name (Arjun Kumar Singh), Customer Ref No (CUST24082100002), Contact No (9876543210), Email Id (arjun.singh001@example.com), Gender (Male), and Date Of Birth (21 Aug 1991). The Service Info section includes fields for Service No (CUSR24082100003), Service Type (Compliment), Branch (Port Suva), Service Date | Time (21 Aug 2024 | 01:30 PM), and Status (Open). Below these sections are dropdown menus for Lead Type, Product Type, and Assigned Department, all set to '--Select--'.



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

The screenshot shows a web application interface for 'Customer Service > Details'. A modal window titled 'Lead > Detail > Add' is open, containing a 'Save' button. The form is divided into three sections:

Customer Name	Customer Ref No	Contact No	Email Id	Gender	Date Of Birth
Arjun Kumar Singh	CUST24082100002	9876543210	arjun.singh001@example.com	Male	21 Aug 1991

Service No	Service Type	Branch	Service Date Time	Status
CUSR24082100003	Compliment	Port Suva	21 Aug 2024 01:30 PM	Open

Lead Type *	Product Type *	Assigned Department *
Chatbots and Live Chats	Trust New	Trust Officers

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.



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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.



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Customer Service > Details

Service Description * 14 / 250

Service taken

Email ID
arjun.singh001@example.com

Contact No
9876543210

Customer Status
Qualified

Lead 1

Document 4

Status History 1 | Communication History 0

Open
JONES J | 21 Aug 2024 | 01:31 PM

Customer Service History 0

Communication History:

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

Customer Service > Details

Service Description * 14 / 250

Service taken

Email ID
arjun.singh001@example.com

Contact No
9876543210

Customer Status
Qualified

Lead 1

Document 4

Status History 1 | Communication History 0

Showing: 0 - 0 of 0 Entries | 25 | < >

To	Date Time	Status	Action
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Customer Service History 0

Customer Service History:

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



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My Task

CRM

Customer Service > Details

Welcome JONES J

Service Description * 14 / 250

Service taken

Contact No
9876543210

Customer Status
Qualified

Lead 1

Document 4

Status History 1 | Communication History 0

Customer Service History 0

Showing: 0 - 0 of 0 Entries | 25 | < >

Customer Service No	Description	Branch	Service By	Status	Lead Count
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