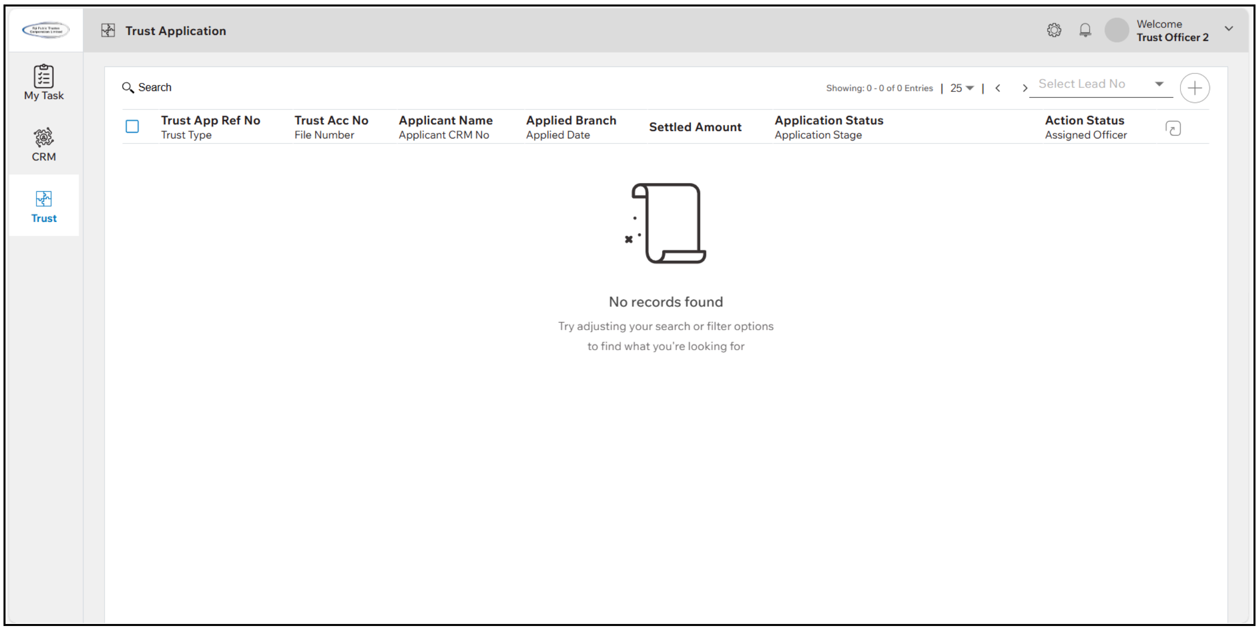
Trust Application

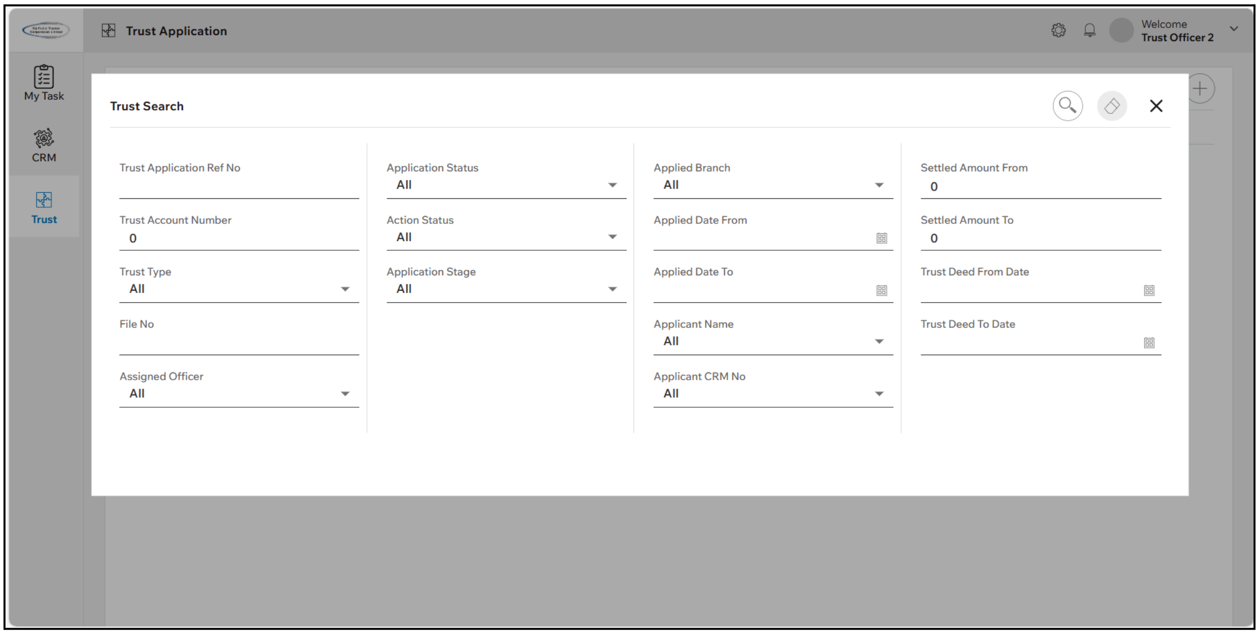
User : Trust Application Creation Officer

This screen helps to Create, Search and Open the Trust Application. To navigate to this screen click on the **CRM** from the menu and click **Trust Application**.

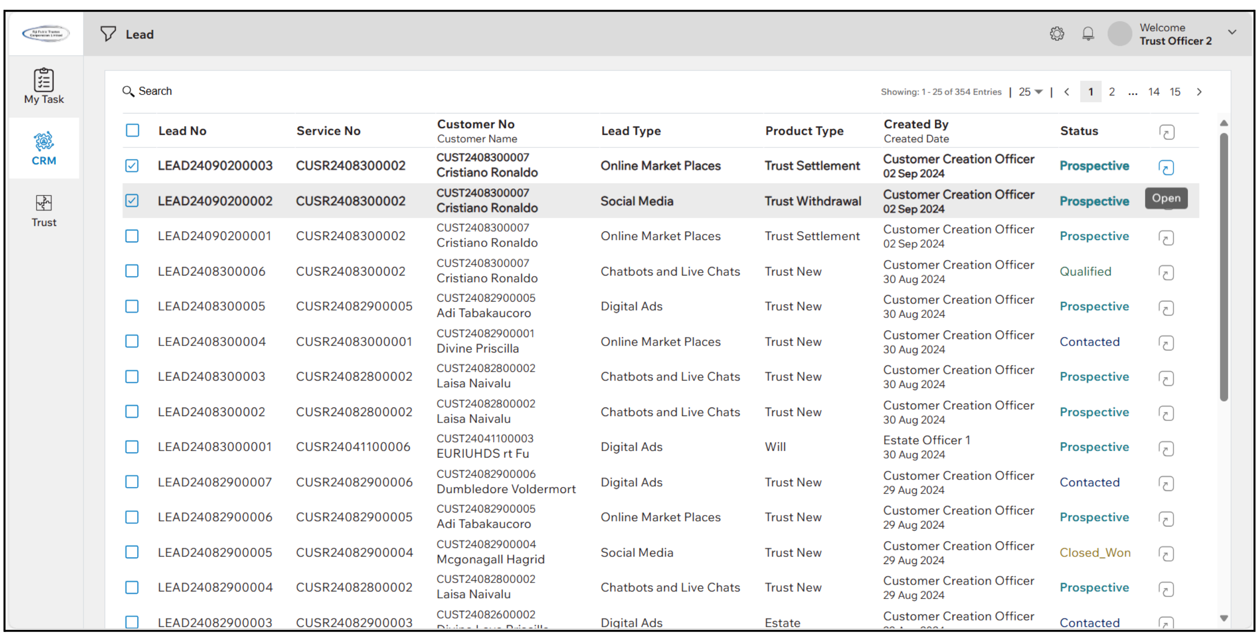


Search Criteria:

1. Click **Search** button, Trust Application Search pop up will be displayed, wherein the user can search based on the given parameters.
2. Enter/Select any of the fields among Trust Search criteria.



3. Click the **Search** icon on top of the pop up to get corresponding results.
4. Click the **Clear** icon next to the search icon to clear all the entered values in the fields.
5. Click the **Open** icon under the action column directly or check the checkbox near the Trust Application number and click the **Open** icon in the table header to navigate to the Trust Application detail screen.

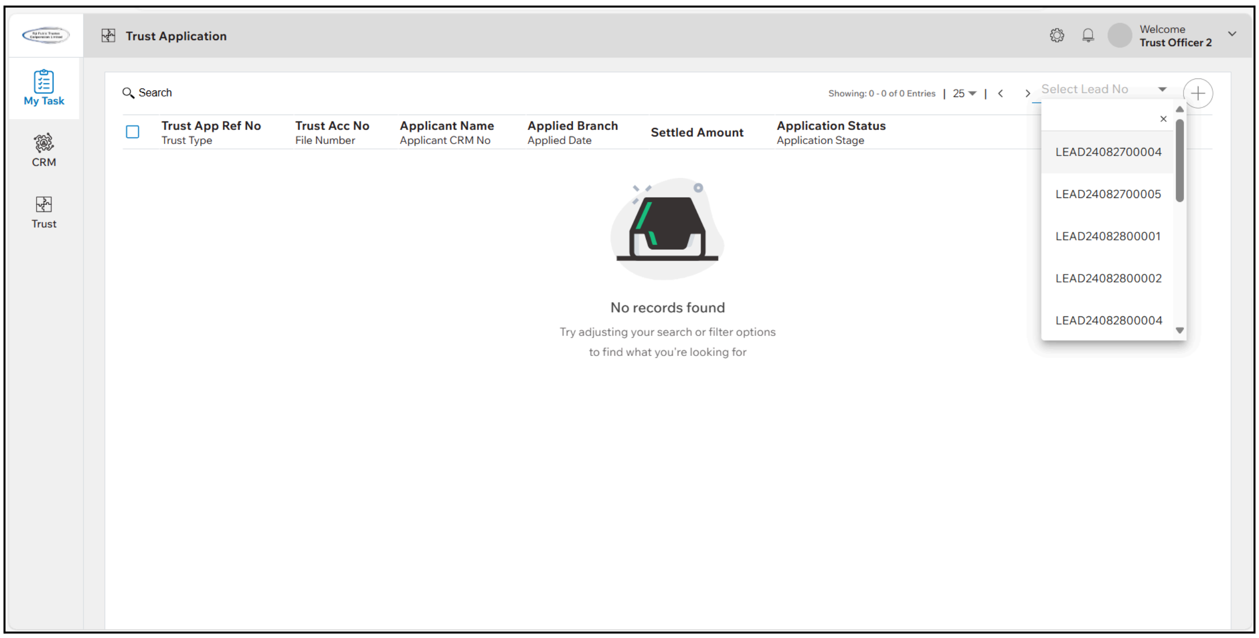


Lead No	Service No	Customer No Customer Name	Lead Type	Product Type	Created By Created Date	Status
LEAD24090200003	CUSR2408300002	CUST2408300007 Cristiano Ronaldo	Online Market Places	Trust Settlement	Customer Creation Officer 02 Sep 2024	Prospective
LEAD24090200002	CUSR2408300002	CUST2408300007 Cristiano Ronaldo	Social Media	Trust Withdrawal	Customer Creation Officer 02 Sep 2024	Prospective
LEAD24090200001	CUSR2408300002	CUST2408300007 Cristiano Ronaldo	Online Market Places	Trust Settlement	Customer Creation Officer 02 Sep 2024	Prospective
LEAD2408300006	CUSR2408300002	CUST2408300007 Cristiano Ronaldo	Chatbots and Live Chats	Trust New	Customer Creation Officer 30 Aug 2024	Qualified
LEAD2408300005	CUSR24082900005	CUST24082900005 Adi Tabakaucoro	Digital Ads	Trust New	Customer Creation Officer 30 Aug 2024	Prospective
LEAD2408300004	CUSR24083000001	CUST24082900001 Divine Priscilla	Online Market Places	Trust New	Customer Creation Officer 30 Aug 2024	Contacted
LEAD2408300003	CUSR24082800002	CUST24082800002 Laisa Naivalu	Chatbots and Live Chats	Trust New	Customer Creation Officer 30 Aug 2024	Prospective
LEAD2408300002	CUSR24082800002	CUST24082800002 Laisa Naivalu	Chatbots and Live Chats	Trust New	Customer Creation Officer 30 Aug 2024	Prospective
LEAD24083000001	CUSR24041100006	CUST24041100003 EURIUHDS rt Fu	Digital Ads	Will	Estate Officer 1 30 Aug 2024	Prospective
LEAD24082900007	CUSR24082900006	CUST24082900006 Dumbledore Voldermort	Digital Ads	Trust New	Customer Creation Officer 29 Aug 2024	Contacted
LEAD24082900006	CUSR24082900005	CUST24082900005 Adi Tabakaucoro	Online Market Places	Trust New	Customer Creation Officer 29 Aug 2024	Prospective
LEAD24082900005	CUSR24082900004	CUST24082900004 Mcgonagall Hagrid	Social Media	Trust New	Customer Creation Officer 29 Aug 2024	Closed_Won
LEAD24082900004	CUSR24082800002	CUST24082800002 Laisa Naivalu	Chatbots and Live Chats	Trust New	Customer Creation Officer 29 Aug 2024	Prospective
LEAD24082900003	CUSR24082900003	CUST24082600002	Digital Ads	Estate	Customer Creation Officer	Contacted

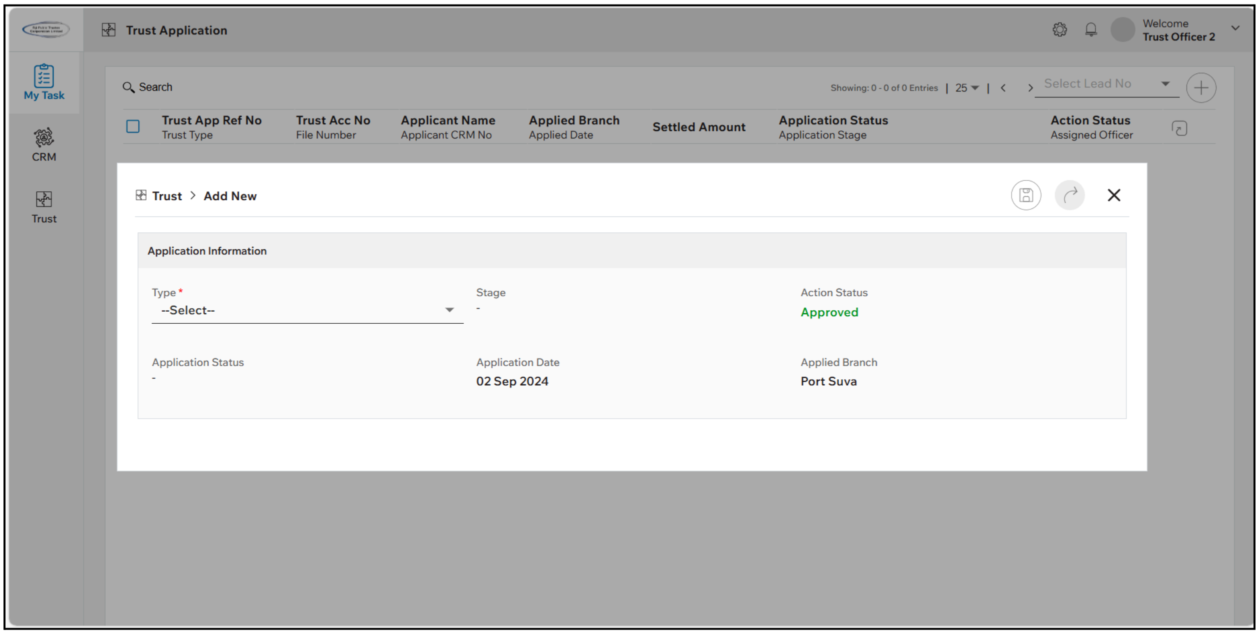
6. If want to open multiple details then click select all checkbox in the table header and click the **Open** icon in the table header.
7. Select the page number to directly go to that particular page.
8. Click the **Next** button on the top right corner to navigate to the next page.
9. Click the **Previous** button on the top right corner to navigate to the previous page.
10. Select the Records count on the top right corner to show the required number of records per page.

Create New Trust Application:

11. To create a new Trust application select the Lead No from the Drop-down list and Click Add Button.



12. Trust Add New Popup will display, Select the Trust Type from DDL.



13. Click **Save** to save the details.
14. Click the **Clear** icon next to search icon to clear all the entered values in the fields.

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