



Fiji Public Trustee Corporation Limited CRM Module- User Manual



Customer Detail

User : Customer Creation Officer

This screen helps to view and modify the details of customers and allows them to add lead and services for the customer.

Edit Customer Information:

1. Initially the details given while saving the customer will be displayed. If you want , you can edit this information.

The screenshot displays the 'Customer Details' page. The header shows a back arrow, 'Customer > Details', and a user profile 'Welcome JONES J'. The left sidebar has 'My Task' and 'CRM' icons. The main content area is titled 'Customer Information' and contains a profile card for 'Arjun Kumar Singh Prospective'. Below the card, there are two sections: 'Employer Information' and 'Additional Information'. The 'Additional Information' section is expanded, showing a list of services rendered: Trust, Will, Estate, Legal Service, Customer Service, and Lead, each with a value of 0. Edit icons are visible next to the 'Additional Information' section and the 'Legal Service' item.

| Customer Information | |
|----------------------|----------------------------|
| Customer No | CUST24082100002 |
| Contact No | 9876543210 |
| Father Name | Rajesh Singh |
| Date of Birth | 21 Aug 1991 |
| Alternate Contact No | 9876543211 |
| Mother Name | Sunita Singh |
| Gender | Male |
| Email ID | arjun.singh001@example.com |
| Guardian Name | - |
| Nationality | Fiji |

| Employer Information | |
|----------------------|--|
| Employer Name | Fiji Airways |
| Net Salary(FJD) | 850000.00 |
| Occupation | Pilot |
| School Name | Delhi Public School |
| Student ID | STU001234 |
| Employer Address | 23 Aviators Lane Airport Road West Terminal Natadola Pele Malampa - 5050. |
| Date Of Death | 21-11-1991 |

| Service Rendered | |
|------------------|---|
| Trust | 0 |
| Will | 0 |
| Estate | 0 |
| Legal Service | 0 |
| Customer Service | 0 |
| Lead | 0 |

2. To edit, click on the **Edit** icon in each panel (Customer Information, Employer Information and Additional Information).



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Customer > Details

Customer Information

Customer No: CUST24082100002

Contact No: 9876543210

Father Name: Rajesh Singh

Date of Birth: 21 Aug 1991

Alternate Contact No: 9876543211

Mother Name: Sunita Singh

Gender: Male

Email ID: arjun.singh001@example.com

Guardian Name: -

Nationality: Fiji

Service Rendered

Trust: 0

Will: 0

Estate: 0

Legal Service: 0

Customer Service: 0

Lead: 0

Employer Information

Employer Name: Fiji Airways

Net Salary(FJD): 850000.00

Employer Address: 23 Aviators Lane Airport Road West Terminal

Occupation: Pilot

School Name: Delhi Public School

Student ID: STU001234

Date Of Death: 21-11-1991

Edit

3. Make changes and click the **Update** button to save the changes made.

Customer > Details

Customer Information

Customer No: CUST24082100002

Contact Number: 9876543210

Father Name: Rajesh Singh

Date of Birth: 21 Aug 1991

Alternate Contact Number: 9876543211

Mother Name: Sunita Singh

First Name: Arjun

Gender: Male

Email ID: arjun.singh001@example

Guardian Name: Singh Baguvan

Middle Name: Kumar

Nationality: Fiji

Last Name: Singh

Service Rendered

Trust: 0

Will: 0

Estate: 0

Legal Service: 0

Customer Service: 1

Lead: 1

Employer Information

Employer Name: Fiji Airways

Net Salary(FJD): 850000.00

Employer Address: 23 Aviators Lane Airport Road West Terminal

Occupation: Pilot

School Name: Delhi Public School

Date Of Death: -

Update



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4. Click the **Refresh** button to reload the last saved values.
5. On the right panel there will be a count displaying the number of services rendered if it exists.

The screenshot shows the 'Customer > Details' page. On the left is a sidebar with 'My Task' and 'CRM' icons. The main content area is titled 'Customer Information' and contains a profile card for 'Arjun Kumar Singh Prospective'. To the right of the card is a table of customer details. Further right is a 'Service Rendered' section with a list of services and their counts.

| Customer No | Contact No | Father Name |
|-----------------|------------|--------------|
| CUST24082100002 | 9876543210 | Rajesh Singh |

| Date of Birth | Alternate Contact No | Mother Name |
|---------------|----------------------|--------------|
| 21 Aug 1991 | 9876543211 | Sunita Singh |

| Gender | Email ID | Guardian Name |
|--------|----------------------------|---------------|
| Male | arjun.singh001@example.com | Singh |

| Nationality |
|-------------|
| Fiji |

| Service Rendered | Count |
|------------------|-------|
| Trust | 0 |
| Will | 0 |
| Estate | 0 |
| Legal Service | 0 |
| Customer Service | 0 |
| Lead | 0 |

Edit Employer Information:

6. Click the **Edit** button to change employer information.

This screenshot shows the same 'Customer > Details' page, but the 'Employer Information' section is expanded. It displays fields for Employer Name, Net Salary, Occupation, School Name, Student ID, Employer Address, and Date Of Death. An 'Edit' button is located at the bottom right of this section. The 'Service Rendered' section on the right is also visible, showing counts for various services.

| Employer Name | Net Salary(FJD) | Employer Address |
|---------------|-----------------|--|
| Fiji Airways | 850000.00 | 23 Aviators Lane Airport Road West Terminal Natadola Pele Malampa - 5050. |

| Occupation | School Name | Date Of Death |
|------------|---------------------|---------------|
| Pilot | Delhi Public School | 21-11-1991 |

| Student ID |
|------------|
| STU001234 |

| Service Rendered | Count |
|------------------|-------|
| Customer Service | 0 |
| Lead | 0 |



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7. If Needed make changes to the necessary details and Click the **Update** button to save the changes.

Customer > Details

My Task

CRM

Employer Information

| | | | |
|---------------|---------------------|------------------|------------|
| Employer Name | Net Salary(FJD) | Line 1 * | Province * |
| Fiji Airways | 850000.00 | 23 Aviators Lane | Malampa |
| Occupation | Student Id * | Line 2 | Island * |
| Pilot | STU0012345 | Airport Road | Pele |
| | School Name * | Line 3 | Village * |
| | Delhi Public School | West Terminal | Natadola |
| Date Of Death | | PO Box No | |
| 21 Nov 1991 | | 5050 | |

Update

Additional Information

Customer Service 0

Customer Update 0

8. Click the **Refresh** button to restore the previous values.

Edit Additional Information:

9. Click the **Edit** button to open the Customer Details Additional Information popup.

Customer > Details

My Task

CRM

Name: Arjun Kumar Singh

Customer No: CUST24082100002

Phone: 9876543210

Date of Birth: 21 Aug 1991

Email: arjun.singh001@exa...

Status: Prospective

Additional Information

| | | | |
|---------------------|----------------|-------------------------|---|
| Residential Address | KYC Details | Social Platform Details | Customer Type |
| | FNPF No - | f - | <input checked="" type="checkbox"/> Person <input type="checkbox"/> Settlor |
| | Voter ID - | in - | <input type="checkbox"/> Trustee <input type="checkbox"/> Applicant |
| Permanent Address | TIN - | WhatsApp - | <input type="checkbox"/> Beneficiary <input type="checkbox"/> Client |
| | Driv Lic No - | Telegram - | <input type="checkbox"/> Gaurdian <input type="checkbox"/> Customer |
| | National ID - | S - | |
| | Passport No - | | |
| | Birth Reg No - | | |

Edit

Customer Service 0

Customer Update 0



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10. Enter details for Residential Address, Permanent Address, KYC Details, and Social Platform Details.

Customer > Details > Additional Information

| Residential Address | Permanent Address <small>Same As Residential Address</small> | KYC Details <small>(Any one field is Mandatory)</small> | Social Platform Details |
|-----------------------------|--|---|--|
| Line 1 * 23 Garden Grove | Line 1 * 23 Garden Grove | FNPF No FNPF0056789 | Facebook ID John@123 |
| Line 2 Orchard Hill | Line 2 Orchard Hill | Driving License No DL56789012 | LinkedIn ID linkedin.com/in/user005 |
| Line 3 East Field | Line 3 East Field | Voter ID VOTER5678MN | Whatsapp No 7981234505 |
| Province * Malampa | Province Malampa | National ID NID445566 | Viber 7981234505 |
| Island * Pele | Island Pele | TIN TIN543210 | Skype ID Skp6357813 |
| Village * Natadola | Village Natadola | Passport No P5678901E | |
| PO Box No 4040 | PO Box No 4040 | Birth Reg No BRN56789012 | |

11. Click the **Save** button to save the entered details.

12. Click the **Refresh** button next to save button to restore the previous values.

13. Click the **Close** button to exit the popup.

Customer > Details

Name: Arjun Kumar Singh | Customer No: CUST24082100002 | Phone: 9876543210 | DOB: 21 Aug 1991 | Email: arjun.singh001@exa... | Status: Prospective

Additional Information

| Residential Address | KYC Details | Social Platform Details | Customer Type |
|--|---|---|---|
| 23 Garden Grove Orchard Hill East Field Natadola Pele Malampa 4040 | FNPF No: FNPF005... Voter ID: VOTER5... TIN: TIN543210 Driv Lic No: DL56789... National ID: NID4455... Passport No: P5678901E Birth Reg No: BRN567... | John@123 linkedin.com/in/user005 7981234505 7981234505 Skp6357813 | <input checked="" type="checkbox"/> Person <input type="checkbox"/> Settlor <input type="checkbox"/> Trustee <input type="checkbox"/> Applicant <input type="checkbox"/> Beneficiary <input type="checkbox"/> Client <input type="checkbox"/> Gaurdian <input type="checkbox"/> Customer |



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Add Customer Service:

14. Click the **Add** button inside the customer service tab to open the Add Customer Service popup.

The screenshot shows the 'Customer > Details' page. The 'Customer Service' tab is selected, displaying a table with columns: Service No, Service Type, Serviced Date, Short Description, Serviced By, Status, and No of Leads. The table is currently empty, showing 'Showing: 0 - 0 of 0 Entries'. There is an 'Add New' button in the top right corner of the table area. Other tabs visible include 'Additional Information', 'Customer Update', 'Trust', 'Estate', 'Legal Service', and 'Bank Information'.

15. Select the customer service details such as service type, Contact Mode, Branch, Communication Type, Status.

The screenshot shows the 'Add Customer Service' popup form. The form contains the following fields:

| 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 Type * | Contact Mode * | Branch * |
|----------------|----------------|-----------|
| Complaint | Email | Port Suva |

| Communication Type * | Status * |
|----------------------|----------|
| Conference | Open |

At the bottom of the form, there is a 'Bank Information' tab with a count of 0.

16. Click the **Save** button to save the details, redirect to the Customer Service detail screen.
17. Click the **Clear** button to remove all entered values.



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Customer Update:

18. Click the **Add** button below the customer update tab to open the customer update>detail> New popup.

The screenshot shows the 'Customer > Details' page. The 'Customer Update' tab is selected, showing a table with columns: Customer Update No, Created By, Created Date, and Status. An 'Add New' button is visible in the top right corner of the table. The left sidebar shows 'My Task' and 'CRM' icons. The top right corner shows 'Welcome JONES J'.

19. Update / Add the necessary information in Common Information, Contact Person Information and Employer Information.

20. Click the **Save** button to save the changes and navigate to Customer Update details screen with status as “**Pending Submission**”.

The screenshot shows the 'Customer Update > Detail > New' popup form. The form is divided into three main sections: Common Information, Contact Person Information, and Employer Information. The 'Common Information' section includes fields for First Name (Arjun), Middle Name (Kumar), Last Name (Singh), Email ID (arjun.singh001@example.cr), Contact Number (9876543210), and Alternate Contact Number (9876543211). The 'Contact Person Information' section includes fields for Father Name (Rajesh Singh), Mother Name (Sunita Singh), Guardian Name (Singh Baguvan), School Name (Delhi Public School), and Student ID (STU0012345). The 'Employer Information' section includes fields for Employer Name (Fiji Airways), Net Salary (FJD) (850000.00), Occupation (Pilot), and three lines of address: Line 1 (23 Aviatc, Province: Malampa), Line 2 (Airport R, Island: Pele), and Line 3 (West Ter, Village: Natadola). A 'Save' button is located in the top right corner of the form.




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The screenshot shows the 'Customer Update > Details' page. The top navigation bar includes a back arrow, the title 'Customer Update > Details', and a user profile 'Welcome JONES J'. The left sidebar has 'My Task' and 'CRM' icons. The main content area is divided into two sections: 'Customer Information' and 'Employer Information'. The 'Customer Information' section displays a profile card for 'Arjun Kumar Singh' with a 'Pending Submission' status. To the right of the card are fields for 'Customer Update No' (CUDA24082200001), 'Date of Birth' (21 Aug 1991), 'Gender' (Male), 'Nationality' (Fiji), 'Contact No' (9876543210), 'Alternate Contact No' (9876543211), 'Email ID' (arjun.singh001@example.com), 'Father Name' (Rajesh Singh), 'Mother Name' (Sunita Singh), and 'Guardian Name' (Singh Baguvan). The 'Employer Information' section displays fields for 'Employer Name' (Fiji Airways), 'Net Salary(FJD)' (850000.00), 'Occupation' (Pilot), 'School Name' (Delhi Public School), and 'Employer Address' (23 Aviators Lane Airport Road West Terminal Natadola Pele Malampa - 5050).

| Customer No | Created By | Created Date | Customer Status |
|-----------------|------------|--------------|-----------------|
| CUST24082100002 | JONES J | 22 Aug 2024 | Qualified |

| Customer Information | |
|--|---|
|  Arjun Kumar Singh Pending Submission | <p>Customer Update No CUDA24082200001</p> <p>Date of Birth 21 Aug 1991</p> <p>Gender Male</p> <p>Nationality Fiji</p> |
| | <p>Contact No 9876543210</p> <p>Alternate Contact No 9876543211</p> <p>Email ID arjun.singh001@example.com</p> <p>Father Name Rajesh Singh</p> <p>Mother Name Sunita Singh</p> <p>Guardian Name Singh Baguvan</p> |

| Employer Information | |
|---|---|
| <p>Employer Name Fiji Airways</p> <p>Occupation Pilot</p> | <p>Net Salary(FJD) 850000.00</p> <p>School Name Delhi Public School</p> <p>Employer Address 23 Aviators Lane Airport Road West Terminal Natadola Pele Malampa - 5050.</p> |

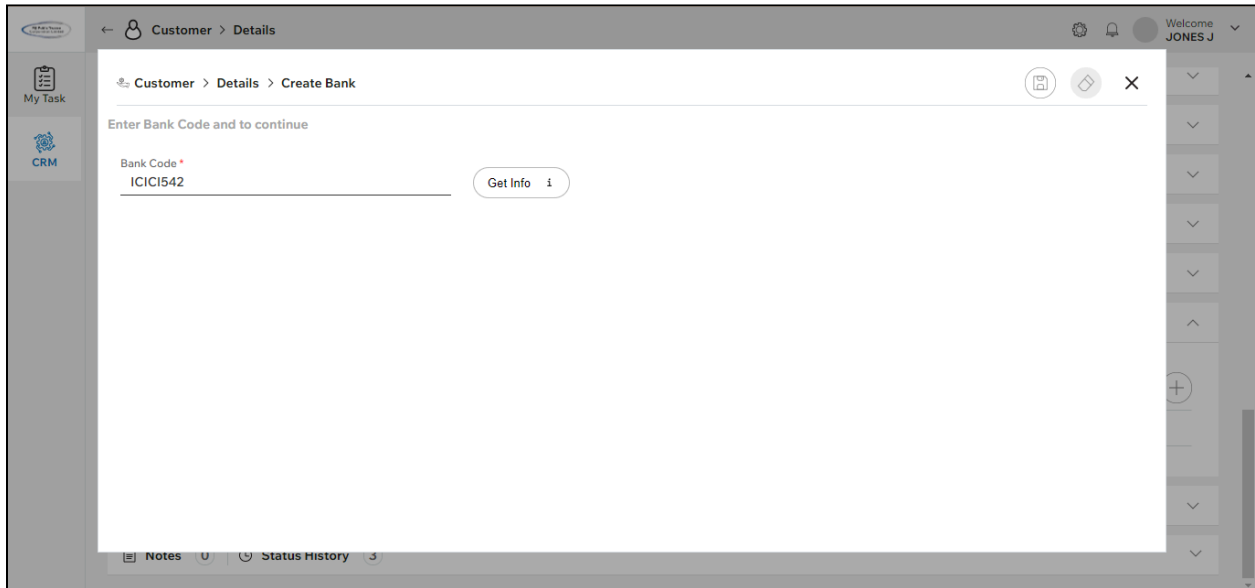
Add Bank Information:

21. Click the **Add** button below the bank information tab to display the Add New Bank Details popup.

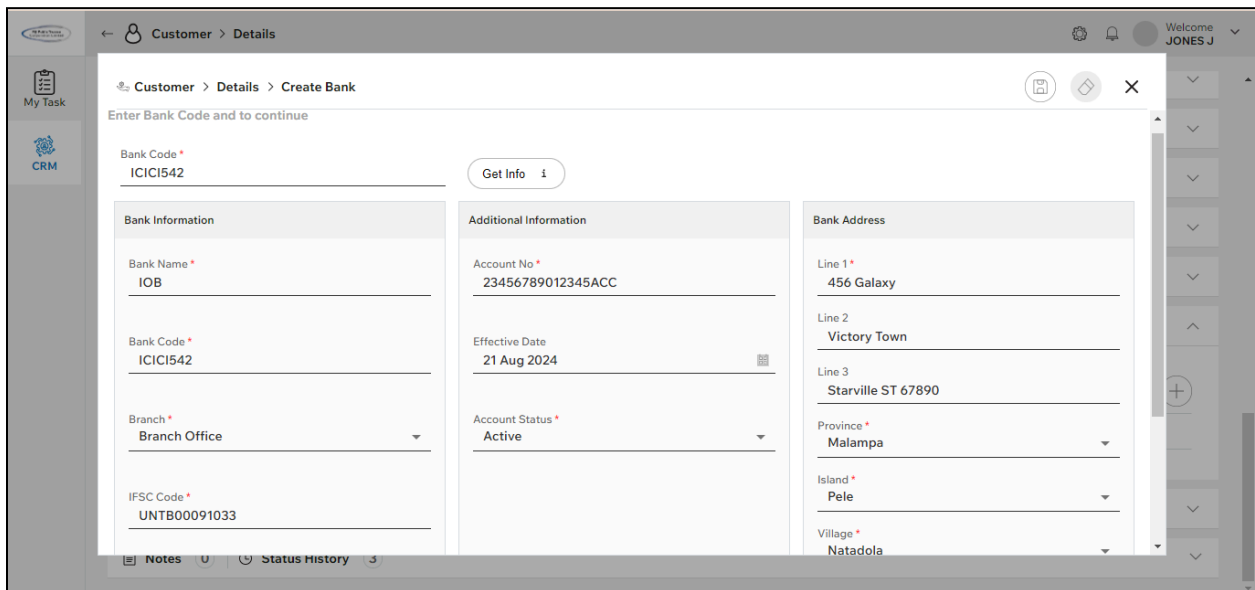
The screenshot shows the 'Customer > Details' page with the 'Bank Information' tab selected. The left sidebar is the same as the previous screenshot. The main content area shows a list of tabs: 'Customer Service' (1), 'Customer Update' (0), 'Trust' (0), 'Estate' (0), 'Legal Service' (0), 'Bank Information' (0), 'Document' (4), and 'Notes' (0). The 'Bank Information' tab is active, displaying a table with columns: 'Bank Name', 'Bank Code', 'Account Number', 'IFSC Code', 'Effective Date', and 'Status'. There is an 'Add New' button at the bottom right of the table. The table currently shows 0 entries.

| Bank Name | Bank Code | Account Number | IFSC Code | Effective Date | Status |
|-----------|-----------|----------------|-----------|----------------|--------|
|-----------|-----------|----------------|-----------|----------------|--------|

22. Enter the bank code and click the **Get Info** button. If Bank code already exists in the Database, details will be auto populated and display.



23. If details are not exists to the database then Enter the required bank information such as Bank Information, Additional Information & Bank Address.



24. Click the **Save** button to save the bank details, which will then display in the grid.

25. Click the **clear** button next to the save button to clear all entered values in search criteria.

26. Click the **close** button to exit the search panel.



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Upload Document:

27. Click the Select button below the document tab.

The screenshot shows the CRM interface for a customer's details. The 'Document' tab is selected, showing a table with 4 documents. The table has columns: Document Name, File Name, File Type, and Uploaded Date. The first document is 'Other Document' with file name 'Other Document.PNG' and type 'PNG'. The other three documents (Voter ID, Birth Certificate, Driving License) have a file name of '-' and no file type listed. The 'Uploaded Date' column is empty for all documents. There are icons for download and delete for each document.

| Document Name | File Name | File Type | Uploaded Date |
|-------------------|--------------------|-----------|---------------|
| Other Document | Other Document.PNG | PNG | |
| Voter ID | - | | |
| Birth Certificate | - | | |
| Driving License | - | | |

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

The screenshot shows the CRM interface for a customer's details. The 'Document' tab is selected, showing a table with 4 documents. The table has columns: Document Name, File Name, File Type, and Uploaded Date. The first document is 'Other Document' with file name 'Other Document.PNG' and type '.PNG'. The other three documents (Voter ID, Birth Certificate, Driving License) have a file name of '-' and no file type listed. The 'Uploaded Date' column is empty for all documents. There are icons for download and delete for each document.

| Document Name | File Name | File Type | Uploaded Date |
|-------------------|--------------------|-----------|---------------|
| Other Document | Other Document.PNG | .PNG | 21 Aug 2024 |
| Voter ID | - | | |
| Birth Certificate | - | | |
| Driving License | - | | |

Notes:

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



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Customer > Details

Welcome JONES J

Name: Arjun Kumar Singh, Customer No: CUST24082100002, Phone: 9876543210, Date of Birth: 21 Aug 1991, Email: arjun.singh001@exa..., Status: Qualified

Additional Information

Customer Service 1

Customer Update 1

Trust 1

Estate 1

Legal Service 1

Bank Information 1

Document 4

Notes 0, Status History 3

Create

30. Select **Status** and enter Notes .

Customer > Detail > Add Notes

Status *
Customer

Notes *
Customer

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Save, Clear, Close(X)

31. Click the **Save** button to save the entered details.

32. Click the **Clear** button next to save button to remove all entered or selected details.

33. Click the **Close(X)** icon to close the panel.



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Status History:

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

The screenshot displays the 'Customer > Details' page in the CRM module. The left sidebar contains 'My Task' and 'CRM' icons. The main content area shows a list of tabs: Trust (1), Estate (1), Legal Service (1), Bank Information (1), Document (4), Notes (0), and Status History (3). The 'Status History' tab is selected, showing a timeline of status changes for customer JONES J on August 21, 2024. The timeline includes three entries: 'Qualified' at 02:57 PM, 'Engaged' at 01:31 PM, and 'Prospective' at 12:38 PM. Each entry is preceded by a circular icon with a checkmark or a plus sign.

| Status | Officer Name | Date & Time |
|-------------|--------------|------------------------|
| Qualified | JONES J | 21 Aug 2024 02:57 PM |
| Engaged | JONES J | 21 Aug 2024 01:31 PM |
| Prospective | JONES J | 21 Aug 2024 12:38 PM |

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