



Fiji Public Trustee Corporation Limited CRM Module- User Manual



Customer Update

User : Customer Creation Officer

This screen helps you view and search for customer update details. To navigate to this screen, click on the CRM from the menu and select Customer Update.

Customer Update No	Customer No	Customer Name	Gender	Date Of Birth	Created By	Created Date	Status
<input type="checkbox"/> CUD24082200003	CUST24082200004	GANESH KUMAR	Male	06 Feb 2001	JONES J	22 Aug 2024	Approved
<input type="checkbox"/> CUD24082200002	CUST24082200003	RICHARDS ETHAN1	Male	14 Aug 2024	Teresia Koroia	22 Aug 2024	Pending Verification
<input type="checkbox"/> CUD24082200001	CUST24082100002	Arjun Kumar Singh	Male	21 Aug 1991	JONES J	22 Aug 2024	Approved
<input type="checkbox"/> CUD24082100001	CUST24082000007	jacab jones	Male	20 Aug 1991	Customer Creation Officer	21 Aug 2024	Cancelled
<input type="checkbox"/> CUD24082000007	CUST24082000011	fsdd fdfff	Female	19 Jun 2001	Customer Creation Officer	20 Aug 2024	Approved
<input type="checkbox"/> CUD24082000006	CUST24082000013	rani R	Female	12 Mar 1959	Teresia Koroia	20 Aug 2024	Pending Verification
<input type="checkbox"/> CUD24082000005	CUST24082000004	James robert	Male	20 Aug 1995	Customer Creation Officer	20 Aug 2024	Pending Verification
<input type="checkbox"/> CUD24082000004	CUST24082000012	muthu kumar	Male	09 Jul 1987	Teresia Koroia	20 Aug 2024	Approved
<input type="checkbox"/> CUD24082000003	CUST24082000006	john mathew	Male	09 Jul 1987	Customer Service Officer	20 Aug 2024	Pending Approval
<input type="checkbox"/> CUD24082000002	CUST24082000005	santhosh kumar	Male	20 Aug 1978	CUSTOMER CREATION OFFICER	20 Aug 2024	Pending Submission
<input type="checkbox"/> CUD24082000001	CUST24082000001	Senga Srinivasan	Male	14 Nov 1991	Super Admin	20 Aug 2024	Pending Submission
<input type="checkbox"/> CUD24081900002	CUST24081900003	RWHG RSH	Female	05 Jan 1981	CUSTOMER CREATION OFFICER	19 Aug 2024	Pending Submission
<input type="checkbox"/> CUD24081900001	CUST24081900001	Bobby Deol	Male	16 Jul 1987	David Miller	19 Aug 2024	Pending Verification
<input type="checkbox"/> CUD24071500001	CUST24071200001		Female	01 Jan 2001	Customer Creation Officer		Pending Verification

1. Click on Search to open the search criteria panel.
2. Enter the search criteria, such as Basic Information: Customer No, Customer Status, First Name, Middle Name, Last Name, Gender, Date of Birth. Contact Information: Email ID, Contact No. and KYC Detail: FNPf No, Driving License No, Voter ID, National ID, TIN No, Passport No.2



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Customer Update No	First Name	Email ID	FNPF No
Enter Customer Update No	Arjun	Enter Email ID	
Customer No	Middle Name	Contact No	Driving License No
		Enter Contact No	
Customer Update Status	Last Name		Voter ID
--Select--			
	Gender		National ID
	Select Gender		
	Date of Birth		TIN No

Customer Update No	Customer No	Gender	Date Of Birth	Created By	Status
<input type="checkbox"/> CUDA24081900001	CUST24081900001 Bobby Deol	Male	16 Jul 1987	David Miller 19 Aug 2024	Pending Verification
<input type="checkbox"/> CUDA24071500001	CUST24071200001 Molly Michael	Female	01 Jan 2001	Customer Creation Officer 15 Jul 2024	Pending Verification

- Click the **Search** button to display the search results in the customer grid.

Customer Update No	Customer No	Gender	Date Of Birth	Created By	Status
<input type="checkbox"/> CUDA24082200001	CUST24082100002 Arjun Kumar Singh	Male	21 Aug 1991	JONES J 22 Aug 2024	Pending Submission

- Click the **Clear** button to remove all entered or selected details and navigate to the customer update search screen.
- Click the **Close** icon to close the search panel.



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6. To navigate to the customer update details, click on the check box and click the open of the search grid.

<input type="checkbox"/>	Customer Update No	Customer No Customer Name	Gender	Date Of Birth	Created By Created Date	Status	
<input checked="" type="checkbox"/>	CUDA24082200001	CUST24082100002 Arjun Kumar Singh	Male	21 Aug 1991	JONES J 22 Aug 2024	Pending Submission	<input type="button" value="Open"/>
<input type="checkbox"/>	CUDA24082100001	CUST2408200007 jacab jones	Male	20 Aug 1991	Customer Creation Officer 21 Aug 2024	Cancelled	
<input type="checkbox"/>	CUDA2408200007	CUST2408200011 fsdd fdfdf	Female	19 Jun 2001	Customer Creation Officer 20 Aug 2024	Approved	
<input type="checkbox"/>	CUDA2408200006	CUST2408200013 rani R	Female	12 Mar 1959	Teresia Koroiaadi 20 Aug 2024	Pending Verification	
<input type="checkbox"/>	CUDA2408200005	CUST2408200004 James robert	Male	20 Aug 1995	Customer Creation Officer 20 Aug 2024	Pending Verification	
<input type="checkbox"/>	CUDA2408200004	CUST2408200012 muthu kumar	Male	09 Jul 1987	Teresia Koroiaadi 20 Aug 2024	Approved	
<input type="checkbox"/>	CUDA2408200003	CUST2408200006 john mathew	Male	09 Jul 1987	Customer Service Officer 20 Aug 2024	Pending Approval	
<input type="checkbox"/>	CUDA2408200002	CUST2408200005 santhosh kumar	Male	20 Aug 1978	CUSTOMER CREATION OFFICER 20 Aug 2024	Pending Submission	
<input type="checkbox"/>	CUDA24082000001	CUST2408200001 Senga Srinivasan	Male	14 Nov 1991	Super Admin 20 Aug 2024	Pending Submission	
<input type="checkbox"/>	CUDA24081900002	CUST24081900003 RWHG RSH	Female	05 Jan 1981	CUSTOMER CREATION OFFICER 19 Aug 2024	Pending Submission	
<input type="checkbox"/>	CUDA24081900001	CUST24081900001 Bobby Deol	Male	16 Jul 1987	David Miller 19 Aug 2024	Pending Verification	
<input type="checkbox"/>	CUDA24071500001	CUST24071200001 Molly Michael	Female	01 Jan 2001	Customer Creation Officer 15 Jul 2024	Pending Verification	
<input type="checkbox"/>	CUDA24052900002	CUST24052900002			Customer Creation Officer		

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