



Fiji Public Trustee Corporation Limited CRM Module- User Manual



Lead

User : Customer Creation Officer

This screen helps to view the lead added to the Customer below customer service.

Lead No	Service No	Customer No Customer Name	Lead Type	Product Type	Created By Created Date	Status
<input type="checkbox"/> LEAD24082300001	CUSR24082300001	CUST24082200004 GANESH KUMAR	Chatbots and Live Chats	Trust Settlement	Customer Creation Officer 23 Aug 2024	Prospective
<input type="checkbox"/> LEAD24082200003	CUSR24082200003	CUST24082200004 GANESH KUMAR	Digital Ads	Trust New	JONES J 22 Aug 2024	Prospective
<input type="checkbox"/> LEAD24082200002	CUSR24082200001	CUST24082200003 RICHARDS ETHAN1	Social Media	Trust New	Teresia Koroiadi 22 Aug 2024	Prospective
<input type="checkbox"/> LEAD24082200001	CUSR24082200002	CUST24082200002 RICHARD ETHAN	Chatbots and Live Chats	Trust New	Teresia Koroiadi 22 Aug 2024	Prospective
<input type="checkbox"/> LEAD24082100006	CUSR24082100001	CUST2408200011 fsdd fdfff	Online Portals	Trust Settlement	Customer Creation Officer1 21 Aug 2024	Prospective
<input type="checkbox"/> LEAD24082100005	CUSR24082100001	CUST2408200011 fsdd fdfff	Online Market Places	Trust Settlement	Customer Creation Officer1 21 Aug 2024	Prospective
<input type="checkbox"/> LEAD24082100004	CUSR24082100001	CUST2408200011 fsdd fdfff	Online Portals	Trust Settlement	Customer Creation Officer1 21 Aug 2024	Prospective
<input type="checkbox"/> LEAD24082100003	CUSR24082100003	CUST24082100002 Arjun Kumar Singh	Chatbots and Live Chats	Trust New	JONES J 21 Aug 2024	Negotiation
<input type="checkbox"/> LEAD24082100002	CUSR24082100002	CUST24082100001 bala P	Chatbots and Live Chats	Legal Service	Customer Creation Officer 21 Aug 2024	Prospective
<input type="checkbox"/> LEAD24082100001	CUSR24082100001	CUST2408200011 fsdd fdfff	Online Portals	Other Service	Customer Creation Officer1 21 Aug 2024	Prospective
<input type="checkbox"/> LEAD2408200040	CUSR2408200024	CUST2408200014 Timaima Lasike	Chatbots and Live Chats	Trust New	Laura Jackson 20 Aug 2024	Prospective
<input type="checkbox"/> LEAD2408200039	CUSR2408200021	CUST2408200011 fsdd fdfff	Chatbots and Live Chats	Trust New	Customer Creation Officer 20 Aug 2024	Prospective
<input type="checkbox"/> LEAD2408200038	CUSR2408200021	CUST2408200011 fsdd fdfff	Chatbots and Live Chats	Other Service	Customer Creation Officer 20 Aug 2024	Prospective
<input type="checkbox"/> LEAD2408200037	CUSR2408200023	CUST2408200007 Laura Jackson	Chatbots and Live Chats	Trust New	Laura Jackson 20 Aug 2024	Prospective

1. Click on the **search** button to open search criteria.

Lead Search

Customer No --Select--	Lead No Enter Lead No	Created By --Select--
Service No --Select--	Lead Type --Select--	Created Date Select Created Date
	Assigned Department --Select--	Status --Select--
	Product Type --Select--	

<input type="checkbox"/> LEAD2408200033	CUSR2408200021	CUST2408200011 Christina Lal	Chatbots and Live Chats	Legal Service	Customer Creation Officer 20 Aug 2024	Prospective
<input type="checkbox"/> LEAD2408200032	CUSR2408200021	CUST2408200011 Christina Lal	Chatbots and Live Chats	Legal Service	Customer Creation Officer 20 Aug 2024	Prospective

2. Enter the search criteria parameters among customer no, Service no, Lead no, Lead Type, Assigned Department, Product Type, Created by, Created Date and Status.



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Lead

My Task

CRM

Lead Search

Customer No
--Select--

Service No
CUR2408210003

Lead No
Enter Lead No

Lead Type
--Select--

Assigned Department
--Select--

Product Type
--Select--

Created By
--Select--

Created Date
Select Created Date

Status
--Select--

<input type="checkbox"/>	LEAD2408200033	CUSR2408200021	CUST2408200011 Christina Lal	Chatbots and Live Chats	Legal Service	Customer Creation Officer 20 Aug 2024	Prospective	
<input type="checkbox"/>	LEAD2408200032	CUSR2408200021	CUST2408200011 Christina Lal	Chatbots and Live Chats	Legal Service	Customer Creation Officer 20 Aug 2024	Prospective	

3. Click the **search** button to execute the search and display results.
4. Click the **clear** button next to the save button to clear all entered values in search criteria.
5. Click the **Close** button to exit the search panel.