



Fiji Public Trustee Corporation Limited CRM Module- User Manual



Lead detail

User : Customer Creation Officer

This screen helps to Create lead for the customer below the customer service . To navigate to this screen click on the **CRM** from the menu and click **lead Detail**.

1. Upon saving the lead details from customer service screen, Initially the lead information that we have saved in the customer service screen will display.

Lead Information			
Lead No LEAD24082100003	Lead Type Chatbots and Live Chats	Customer Service Information	
Product Type Trust New	Lead Date Time 21-08-2024 14:54	Service No CUSR24082100003	Customer No CUST24082100002
Assigned Department Trust Officers	Status Prospective	Service Type Compliment	Customer Name Arjun Kumar Singh
		Service Date Time 21-08-2024 13:30	Email ID arjun.singh001@example.com
		Service Status Open	Contact No 9876543210
			Customer Status Qualified
Description			

2. On the right panel customer service and customer information with their status of application will display.



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The screenshot shows the 'Lead > Details' page in the CRM module. The page is divided into several sections:

- Lead Information:**
 - Lead No: LEAD24082100003
 - Lead Type: Chatbots and Live Chats
 - Product Type: Trust New
 - Lead Date | Time: 21-08-2024 14:54
 - Assigned Department: Trust Officers
 - Status: Prospective
- Customer Service Information:**
 - Service No: [CUSR24082100003](#)
 - Service Type: Compliment
 - Service Date | Time: 21-08-2024 13:30
 - Service Status: Open
- Customer Information:**
 - Customer No: [CUST24082100002](#)
 - Customer Name: Arjun Kumar Singh
 - Email ID: arjun.singh001@example.com
 - Contact No: 9876543210
 - Customer Status: Qualified
- Description:** A text area for additional details.

Navigation icons on the left include 'My Task', 'CRM', and 'Trust'. The top right shows a user profile for 'virat kh'.

3. To edit lead information, Click on the **Edit** button.

This screenshot is identical to the previous one, but with an 'Edit' button highlighted in a dark grey box at the bottom center of the 'Lead Information' section, indicating the next step in the process.

4. Click the **Update** button to save the changes.

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



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6. click the **Edit** button, enter the service description.

The screenshot shows the 'Lead > Details' page in the CRM module. The left sidebar contains 'My Task', 'CRM', and 'Trust' icons. The main content area is divided into three columns. The first column has an 'Edit' button. The second column displays 'Service Data | Time' as '21-08-2024 13:30' and 'Service Status' as 'Open'. The third column shows 'Email ID' as 'arjun.singh001@example.com', 'Contact No' as '9876543210', and 'Customer Status' as 'Qualified'. Below these columns is a 'Description' section with a text area containing 'Changes done for lead information' and a character count of '33 / 250'. At the bottom, there are tabs for 'Notes' (0) and 'Document' (4).

7. Click the **Save** button to save the details.

8. Click the **Clear** button to undo the selection.

Notes:

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

This screenshot shows the same 'Lead > Details' page, but with the 'Notes' tab selected. The 'Description' field now contains 'Changes Done for lead information'. Below the 'Notes' tab, there is an 'Add' button (a circle with a plus sign) to create a new note. The 'Document' tab shows 4 documents. At the bottom, there are additional tabs for 'Assigned Officer' (1), 'Status History' (1), 'Communication History' (1), and 'Lead History' (0).



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2. Click on **Add** button, Lead detail add notes popup will display..

3. Select **Status** and enter Notes .

4. Click the **Save** button to save the entered details.
5. Click the **Clear** button next to save button to remove all entered or selected details.
6. Click the **Close** icon to close the panel.



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7. The saved notes will be displayed in the notes grid.

The screenshot shows the 'Lead > Details' page in the CRM module. The page has a sidebar with 'My Task', 'CRM', and 'Trust' icons. The main content area displays the lead's phone number (98/6543210) and customer status (Qualified). Below this is a 'Description' field with the text 'Changes Done for lead information'. A 'Notes' section shows one note: 'Contacted', dated '21 Aug 2024 05:06 PM' by 'virat kh'. At the bottom, there are tabs for 'Assigned Officer' (1), 'Status History' (2), and 'Communication History' (1).

Upload Document:

1. Click the **Select** button below the document tab.

The screenshot shows the 'Lead > Details' page with the 'Document' tab selected. It displays a table of uploaded documents. The table has columns for 'Document Name', 'File Name', 'File Type', and 'Uploaded Date'. There are four documents listed: 'Other Document', 'Votor ID', 'Birth Certificate', and 'Driving License'. Each document has a 'Select' button and a 'Delete' button. Below the table, there are tabs for 'Assigned Officer' (1), 'Status History' (2), 'Communication History' (1), and 'Lead History' (0).

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

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



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Assigned Officer :

1. Assigned officer history based on each status change will be maintained in this tab.

Changes done for lead information

Notes 1

Document 4

Assigned Officer 1 | Status History 2 | Communication History 1

Showing: 1- 1 of 1 Entries | 25 | < 1 >

Assigned Officer	Assigned Date	Assigned By	Status
virat kh	21 Aug 2024	JONES J	Prospective

Lead History 0

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

Lead No	Lead Type	Product Type	Lead Date	Status
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2. Officers can be reassigned to any other officer in the same group. To Reassign, select the Officer Name and click the Re Assign button.

Changes done for lead information

Notes 1

Document 4

Assigned Officer 1 | Status History 2 | Communication History 1

Showing: 1- 1 of 1 Entries | 25 | < 1 >

Assigned Officer	Assigned Date	Assigned By
virat kh	21 Aug 2024	JONES J

Lead History 0

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

Lead No	Lead Type	Product Type	Lead Date
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- Ajendra Naidu
- shaji A
- shaji123 A
- Trust Officer 1
- Trust Officer 2



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Status History:

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

The screenshot shows the 'Lead > Details' page in the CRM module. The left sidebar contains 'My Task', 'CRM', and 'Trust' icons. The main content area displays the 'Status History' tab, which shows a timeline of events: 'Contacted virat kh | 21 Aug 2024 | 05:06 PM' and 'Prospective JONES J | 21 Aug 2024 | 02:57 PM'. The 'Assigned Officer' is 'virat kh'. The 'Description' field contains 'Changes Done for lead information'. The 'Notes' and 'Document' sections are also visible.

Communication History:

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

The screenshot shows the 'Lead > Details' page in the CRM module, with the 'Communication History' tab selected. The left sidebar contains 'My Task', 'CRM', and 'Trust' icons. The main content area displays the 'Communication History' tab, which shows a table of email logs. The table has columns for 'To', 'Date | Time', 'Status', and 'Action'. The first entry shows 'grijdgh@gmail.com' as the recipient, '21 Aug 2024 | 02:57 PM' as the date and time, 'Mail Delivery Failed' as the status, and a red envelope icon as the action. The 'Assigned Officer' is 'virat kh'. The 'Description' field contains 'Changes Done for lead information'. The 'Notes' and 'Document' sections are also visible.

To	Date Time	Status	Action
grijdgh@gmail.com	21 Aug 2024 02:57 PM	Mail Delivery Failed	



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Lead History:

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

The screenshot displays the 'Lead Details' page in the CRM module. The left sidebar contains navigation icons for 'My Task', 'CRM', and 'Trust'. The main content area shows the 'Lead Details' view for a lead with status 'Qualified'. The 'Lead History' tab is selected, showing a table with columns: Lead No, Lead Type, Product Type, Lead Date, and Status. The table currently displays 0 entries. Other tabs visible include Description, Notes (1), Document (4), Assigned Officer (1), Status History (2), and Communication History (1).

Lead No	Lead Type	Product Type	Lead Date	Status
Showing: 0 - 0 of 0 Entries 25 ▼ < >				

****END OF DOCUMENT****