

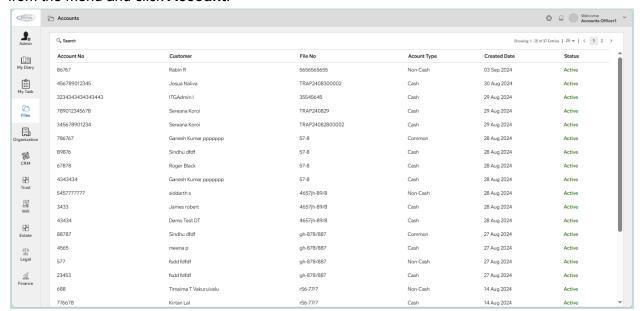
Fiji Public Trustee Corporation Limited CRM Module- User Manual



Account

User: Trust Officer, Estate Officer, Met, TI, Accounts officer

This screen helps to Search and View the Accounts. To navigate to this screen click on the **Files** from the menu and click **Account**.



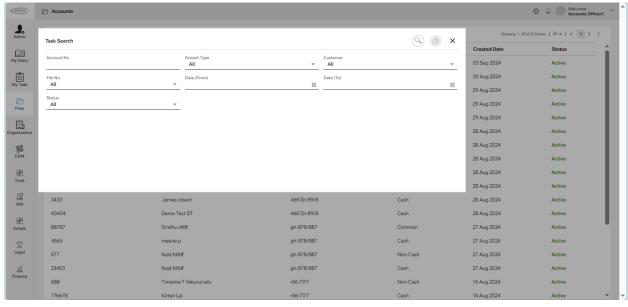
Search Criteria

1. Click **Search** button, **Account Search** pop up will be displayed, wherein the user can search based on the given parameters.

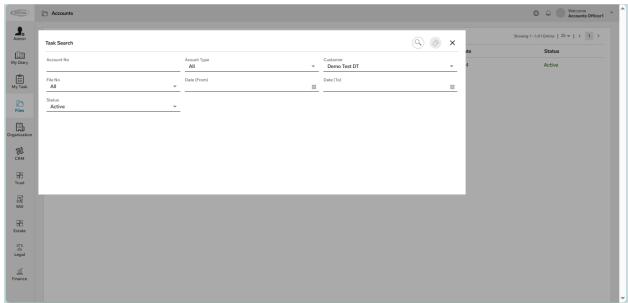


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2. Enter/Select any of the fields among Account No , Account Type , Customer , File No , Date (From) , Date (To) , Status.

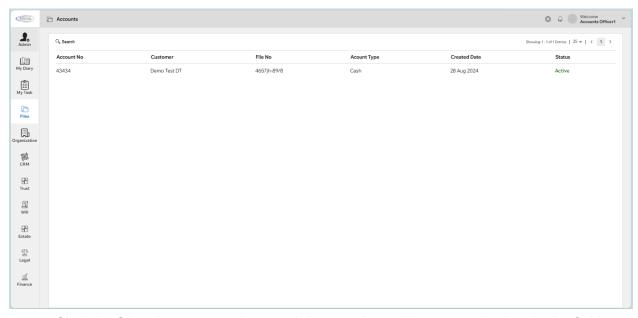


3. Click the **Search** icon on top of the pop up to get corresponding results.

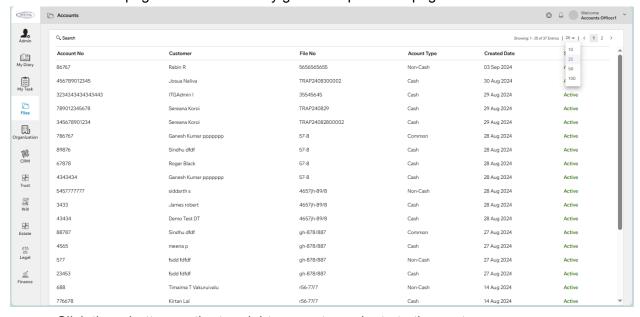


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- 4. Click the Clear icon next to the search icon to clear all the entered values in the fields.
- 5. Click the **Close** button to exit the search panel.
- 6. Select the page number to directly go to that particular page.



- 7. Click the > button on the top right corner to navigate to the next page.
- 8. Click the < button on the top right corner to navigate to the previous page.
- Select the Records count on the top right corner to show the required number of records per page.

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