



## Fiji Public Trustee Corporation Limited CRM Module- User Manual



### Customer Service

#### User : Customer Creation Officer

This screen helps you view the customer service list added to the customer. To navigate to this screen click on the **CRM** from the menu and click **Customer Service**.

| <input type="checkbox"/>            | Service No      | Customer Name<br>Customer No         | Service Type | Branch<br>Service Date   By                           | Duration<br>(days) | Status | No of Leads |  |
|-------------------------------------|-----------------|--------------------------------------|--------------|---|--------------------|--------|-------------|--|
| <input type="checkbox"/>            | CUSR24082100003 | Arjun Kumar Singh<br>CUST24082100002 | Compliment   | Port Suva<br>21 Aug 2024   JONES J                    | 0                  | Open   | 0           |  |
| <input type="checkbox"/>            | CUSR24082100002 | bala P<br>CUST24082100001            | Compliment   | Port Suva<br>21 Aug 2024   Customer Creation Officer  | 0                  | Open   | 1           |  |
| <input type="checkbox"/>            | CUSR24082100001 | Christina Lal<br>CUST2408200011      | Enquiry      | Port Suva<br>21 Aug 2024   Customer Creation Officer1 | 0                  | Open   | 1           |  |
| <input type="checkbox"/>            | CUSR2408200024  | Timaine Lasike<br>CUST2408200014     | Complaint    | Port Suva<br>20 Aug 2024   Laura Jackson              | 1                  | Open   | 1           |  |
| <input type="checkbox"/>            | CUSR2408200023  | jacab jones<br>CUST2408200007        | Complaint    | Port Suva<br>20 Aug 2024   Laura Jackson              | 1                  | Open   | 1           |  |
| <input type="checkbox"/>            | CUSR2408200022  | rani R<br>CUST2408200013             | Complaint    | Port Suva<br>20 Aug 2024   Teresia Koroiadi           | 1                  | Open   | 1           |  |
| <input type="checkbox"/>            | CUSR2408200021  | Christina Lal<br>CUST2408200011      | Complaint    | Port Suva<br>20 Aug 2024   Customer Creation Officer  | 1                  | Open   | 7           |  |
| <input type="checkbox"/>            | CUSR2408200020  | muthu kumar<br>CUST2408200012        | Enquiry      | Port Suva<br>20 Aug 2024   Teresia Koroiadi           | 1                  | Open   | 2           |  |
| <input type="checkbox"/>            | CUSR2408200019  | muthu kumar<br>CUST2408200012        | Complaint    | Port Vila<br>20 Aug 2024   Teresia Koroiadi           | 1                  | Open   | 0           |  |
| <input type="checkbox"/>            | CUSR2408200018  | mike john<br>CUST2408200010          | Suggestion   | Port Suva<br>20 Aug 2024   Teresia Koroiadi           | 1                  | Open   | 1           |  |
| <input checked="" type="checkbox"/> | CUSR2408200017  | SP2 s s1<br>CUST23111500002          | Suggestion   | Port Suva<br>20 Aug 2024   Trust Officer 2            | 1                  | Open   | 0           |  |
| <input type="checkbox"/>            | CUSR2408200016  | Christopher C<br>CUST2408200009      | Complaint    | Port Suva<br>20 Aug 2024   Teresia Koroiadi           | 1                  | Open   | 2           |  |

1. Click on **Search** to open the search criteria panel.

**Customer Service Search**

Customer No  
--Select--

Service No  
Enter Service No

Service Type  
--Select--

Communication Type  
--Select--

Status  
--Select--

Branch  
--Select--

Service By  
--Select--

Service Date  
Select Service Date

|                                     |                |                                 |            |   |   |      |   |  |
|-------------------------------------|----------------|---------------------------------|------------|---|---|------|---|--|
| <input checked="" type="checkbox"/> | CUSR2408200017 | SP2 s s1<br>CUST23111500002     | Suggestion | Port Suva<br>20 Aug 2024   Trust Officer 2  | 1 | Open | 0 |  |
| <input type="checkbox"/>            | CUSR2408200016 | Christopher C<br>CUST2408200009 | Complaint  | Port Suva<br>20 Aug 2024   Teresia Koroiadi | 1 | Open | 2 |  |



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2. Enter the search criteria such as Customer No, Service No, Service Type, Communication Type, Status, Branch, Service By, and Service Date.

The screenshot shows the 'Customer Service Search' window. It contains several dropdown menus for search criteria: Customer No (CUST2311200001), Service Type (Complaint), Branch (Port Suva), Service No (CUSR24082100003), Communication Type (--Select--), Service By (--Select--), Status (Open), and Service Date (Select Service Date). Below the search criteria, there is a table with search results.

| Service No   | Customer Name                    | Service Type | Branch                                      | Duration (days) | Status | No of Leads |
|--|----------------------------------|--------------|---|-----------------|--------|-------------|
| <input checked="" type="checkbox"/> CUSR2408200017 | SP2 s s1<br>CUST23111500002      | Suggestion   | Port Suva<br>20 Aug 2024   Trust Officer 2  | 1               | Open   | 0           |
| <input type="checkbox"/> CUSR2408200016            | Christopher C.<br>CUST2408200009 | Complaint    | Port Suva<br>20 Aug 2024   Teresia Koroiaji | 1               | Open   | 2           |

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

The screenshot shows the 'Customer Service Search' window with the search results displayed in a grid. The grid has columns for Service No, Customer Name, Service Type, Branch, Duration, Status, and No of Leads. The search criteria are still visible at the top.

| Service No                               | Customer Name                        | Service Type | Branch                             | Duration (days) | Status | No of Leads |
|--|--------------------------------------|--------------|------------------------------------|-----------------|--------|-------------|
| <input type="checkbox"/> CUSR24082100003 | Arjun Kumar Singh<br>CUST24082100002 | Compliment   | Port Suva<br>21 Aug 2024   JONES J | 0               | Open   | 0           |

4. Click the **Clear** button to remove all entered or selected details.
5. Click the **Close** icon to close the search panel.



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- From the customer service grid, select the customer checkbox and click **Open** to view the details of the selected customer service. To open a single customer detail, click **Open** to go to the customer detail screen.

| <input checked="" type="checkbox"/> | Service No      | Customer Name<br>Customer No         | Service Type | Branch<br>Service Date   By                           | Duration<br>(days) | Status | No of Leads |               |
|-------------------------------------|-----------------|--------------------------------------|--------------|---|--------------------|--------|-------------|---------------|
| <input checked="" type="checkbox"/> | CUSR24082100003 | Arjun Kumar Singh<br>CUST24082100002 | Compliment   | Port Suva<br>21 Aug 2024   JONES J                    | 0                  | Open   | 0           | Open Selected |
| <input checked="" type="checkbox"/> | CUSR24082100002 | bala P<br>CUST24082100001            | Compliment   | Port Suva<br>21 Aug 2024   Customer Creation Officer  | 0                  | Open   | 1           |               |
| <input checked="" type="checkbox"/> | CUSR24082100001 | Christina Lal<br>CUST2408200011      | Enquiry      | Port Suva<br>21 Aug 2024   Customer Creation Officer1 | 0                  | Open   | 1           |               |
| <input checked="" type="checkbox"/> | CUSR2408200024  | Timaima Lasike<br>CUST2408200014     | Complaint    | Port Suva<br>20 Aug 2024   Laura Jackson              | 1                  | Open   | 1           |               |
| <input checked="" type="checkbox"/> | CUSR2408200023  | jacab jones<br>CUST2408200007        | Complaint    | Port Suva<br>20 Aug 2024   Laura Jackson              | 1                  | Open   | 1           |               |
| <input checked="" type="checkbox"/> | CUSR2408200022  | rani R<br>CUST2408200013             | Complaint    | Port Suva<br>20 Aug 2024   Teresia Koroiaadi          | 1                  | Open   | 1           |               |
| <input checked="" type="checkbox"/> | CUSR2408200021  | Christina Lal<br>CUST2408200011      | Complaint    | Port Suva<br>20 Aug 2024   Customer Creation Officer  | 1                  | Open   | 7           |               |
| <input checked="" type="checkbox"/> | CUSR2408200020  | muthu kumar<br>CUST2408200012        | Enquiry      | Port Suva<br>20 Aug 2024   Teresia Koroiaadi          | 1                  | Open   | 2           |               |
| <input checked="" type="checkbox"/> | CUSR2408200019  | muthu kumar<br>CUST2408200012        | Complaint    | Port Vila<br>20 Aug 2024   Teresia Koroiaadi          | 1                  | Open   | 0           |               |
| <input checked="" type="checkbox"/> | CUSR2408200018  | mike john<br>CUST2408200010          | Suggestion   | Port Suva<br>20 Aug 2024   Teresia Koroiaadi          | 1                  | Open   | 1           |               |
| <input checked="" type="checkbox"/> | CUSR2408200017  | SP2 s s1<br>CUST23111500002          | Suggestion   | Port Suva<br>20 Aug 2024   Trust Officer 2            | 1                  | Open   | 0           |               |
| <input checked="" type="checkbox"/> | CUSR2408200016  | Christopher C<br>CUST2408200009      | Complaint    | Port Suva<br>20 Aug 2024   Teresia Koroiaadi          | 1                  | Open   | 2           |               |

### To add customer service details:

- To Add new customer service to the customer click on the **Add(+)** button.



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| Customer No    | Customer Name | Contact No     | Email Id | Gender | Date Of Birth | Service Type | Contact Mode | Branch | Communication Type | Status |
|----------------|---------------|----------------|----------|--------|---------------|--------------|--------------|--------|--------------------|--------|
| CUSR2408200016 | Christopher C | CUST2408200009 |          |        |               |              |              |        |                    | Open   |

2. Select a customer number from the Customer No drop-down list, or click the **Search** icon to open the customer list. Choose a customer number from the customer list.

| Customer No    | Customer Name | Contact No     | Email Id | Gender | Date Of Birth | Service Type | Contact Mode | Branch | Communication Type | Status |
|----------------|---------------|----------------|----------|--------|---------------|--------------|--------------|--------|--------------------|--------|
| CUSR2408200016 | Christopher C | CUST2408200009 |          |        |               |              |              |        |                    | Open   |

3. Select the Service Type, Contact mode , Branch , Communication Type, and Status.



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Customer Service > Detail > Add

Customer No \*  
CUST24082100001

|                         |                         |                            |                |                              |
|-------------------------|-------------------------|----------------------------|----------------|------------------------------|
| Customer Name<br>bala P | Contact No<br>987655432 | Email Id<br>bala@gmail.com | Gender<br>Male | Date Of Birth<br>21 Feb 2006 |
|-------------------------|-------------------------|----------------------------|----------------|------------------------------|

|                             |                         |                       |
|-----------------------------|-------------------------|-----------------------|
| Service Type *<br>Complaint | Contact Mode *<br>Email | Branch *<br>Port Suva |
|-----------------------------|-------------------------|-----------------------|

|                               |                  |
|-------------------------------|------------------|
| Communication Type *<br>Email | Status *<br>Open |
|-------------------------------|------------------|

☐ CUSR2408200016 Christopher C CUST2408200009 Complaint Port Suva 20 Aug 2024 | Teresia Koroladi 1 Open 2

4. Click the **Save** button to save the details and redirect to the customer service information screen.
5. Click the **Clear** button next to save button to remove all entered or selected details.
6. Click the **Close(X)** icon to close the panel.

**\*\*END OF DOCUMENT\*\***