

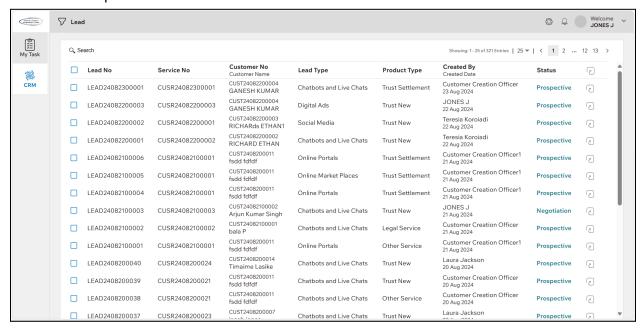
Fiji Public Trustee Corporation Limited CRM Module- User Manual



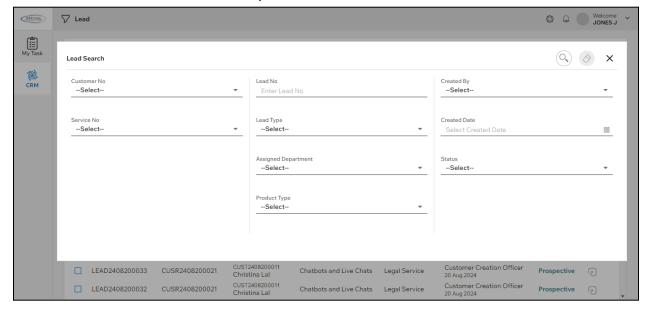
Lead

User: Customer Creation Officer

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



Click on the search button to open search criteria.

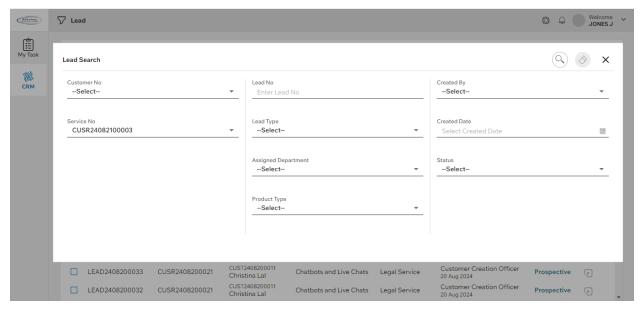


2. Enter the search criteria parameters among customer no, Service no, Lead no, Lead Type, Assigned Department, Product Type, Created by, Created Date and Status.



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- 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.