



Introduction This quick help guide contains steps to manage customer details (Individual and Corporate Customers) in the Customer Relationship Management System (CRMS).

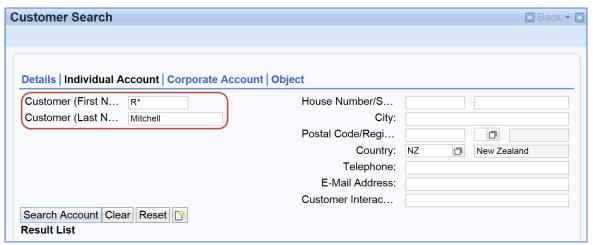
Role required You need to be logged on as an Advisor to perform this task.

Manage customer details (individual)

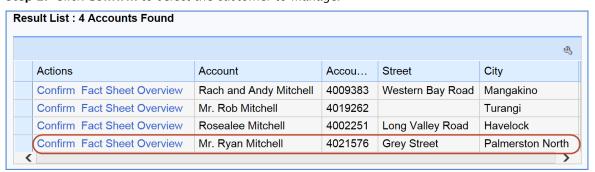
Locating an Individual Customer

Step 1: Locate and select the customer using the **Customer Search**.

See: HNO CRMS Customer Search Quick Help Guide.



Step 2: Click **Confirm** to select the customer to manage.



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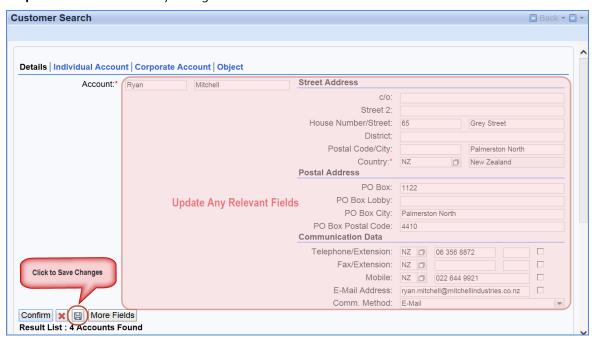


Manage customer details (individual), continued

Step 3: Click the Edit button. The page will redisplay with details in edit mode.



Step 4: Make the necessary changes and click the Save button.



Result: The Customer's details are updated.

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Manage customer details (corporate)

Locating a Corporate Customer

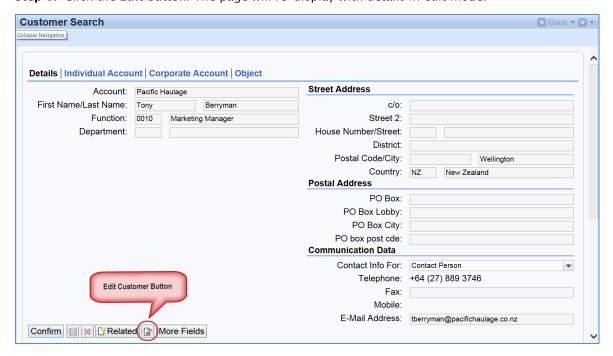
Step 1: Locate and select the customer using the Customer Search.



Step 2: Click **Confirm** to select the contact person to manage.



Step 3: Click the Edit button. The page will re-display with details in edit mode.



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Manage customer details (corporate), continued

Step 4: Click the Edit button. The page will re-display with details in edit mode.

