

Customer



Creating new customers is a key function of the customer page in a loan management system (LMS). But it actually offers a wider range of benefits for both borrowers and lenders. the customer page allows you to easily create new customer profiles within the LMS.

The information in the customer page feeds into various other functionalities of the LMS. For instance, customer details are used during:

- **Asset Valuation:** When appraising an asset for a loan, the customer's financial situation and creditworthiness might be considered.
- **Loan Prospect:** The LMS might use customer data to identify potential borrowers who fit specific loan criteria.

Functionalities

- Add New Customer
- List All Customer
- Edit Exist Customer

Add New Customer

- Customer Types- Individual and Corporate

- According to the customer type , the fields changed.

- Sections according to the add new customer.

1. Agent of Customer Information
2. Customer Relatives Information
3. Vehicles Information
4. Real Estate Information

- User able to add and remove sections by using + and x Buttons.

List All Customer

- User able to filter customer using,

1. Customer Name
2. ID Card/ Corporate No
3. Phone No
4. Customer ID

- In Actions user able to Edit and Add to Blacklist the customer.

Customer / ລູກຄ້າ

Dashboard / Customer List / ລາຍການຂອງລູກຄ້າ

Customer List / ລາຍການຂອງລູກຄ້າ

Customer Name / ຊື່ລູກຄ້າ

Family Book No / ເລກສໍານະໂນຄົວ

Phone No / ເບີໂທລະສັບ

Customer ID

Find / ຄົ້ນຫາ

Customer ID	Customer Type / ປະເພດລູກຄ້າ	Family Book No / ເລກສໍານະໂນຄົວ	Acquisition Route / ສະຖານທີ່ໄດ້ມາ	Customer Name / Company Name / ຊື່ລູກຄ້າ / ຊື່ບໍລິສັດ	Main Phone No / ເບີໂທຫຼັກ	Secondary Phone No / ເບີໂທສໍາຮອງ	Staff / ພະນັກງານ	Date Created / ວັນທີສ້າງ	Blacklisted	Action / ຈັດການ
45438	Individual	154		Ms Khounsamone DOUANGNUE / ນາງ ຫວ່າງໄຈ ພິມມະສອນ	2054687961	2056879681	3942 - ກະຕ່າຍ	16 Feb 2024 08:11:59 AM	Yes	<div><div></div><div></div></div>
45437	Individual	253		MRS SENGALOUN DOUANGNUE / ນາງ ສວ່າງໄຈ ພິມມະສອນ	02094434571	2056879681	3942 - ກະຕ່າຍ	16 Feb 2024 07:30:39 AM	No	<div><div></div><div></div></div>
45436	Individual	9645782341	Newspaper Advertising	Poojani herath / samadi perera	02093456789	02094578625	111114 - Odeesha	12 Feb 2024 01:07:06 PM	No	<div><div></div><div></div></div>
45435	Individual	1234567	FACEBOOK	Harshi Test / ຮາຊີ ການພິດສອນ	02094567899	02094123455	111112 -	8 Feb 2024 05:41:53 PM	No	<div><div></div><div></div></div>
45434	Individual	92-23456	Others	Lanka Cus Senanayaka Cus / Lanka Cus Lao Senn Cus Lao	02029942967	02024556784	23478945 - lanka	8 Feb 2024 11:30:53 AM	No	<div><div></div><div></div></div>

Merge Customer

- In the Merge Customer section is use for merge same customers under one mobile number.
- The Added Requests able to Approve , Reject and Show the details by using Action column in the Merge Customer list.

Revision #3
Created 23 July 2024 08:00:52 by Odeesha Gamage
Updated 25 July 2024 10:51:09 by Odeesha Gamage