



Fiji Public Trustee Corporation Limited Trust Module- User Manual



Trust Withdrawal

User : Trust Application Creation Officer

This screen helps to Create, Search and Open the Trust Application. To navigate to this screen click on the **Trust Application** from the menu and click **Trust Withdrawal**.

Trust Withdrawal Ref No Lead No	Beneficiary Name Guardian Name	Withdrawal Type Withdrawal Sub Type	Trust Application No	Entered Date Entered By Applied Branch	Application Stage Action Status Assigned Officer
TWDR24090300002 LEAD24090200002	Christiano Guardian	Education Education Expenses	24013000001	03 Sep 2024 Port Vila	Verify Documents Pending Approval
TWDR24090300001 LEAD24090300001		Education Education Expenses	43434	03 Sep 2024 Port Vila	Approval of Withdraw (below Threshold) Approved
TWDR24090200001 LEAD24090200002	Christiano Guardian	Maintenance Disability Allowance	9298	02 Sep 2024 Port Vila	Receiving Supporting Documents Cancelled
TWDR24081200003 LEAD24081200003		Education Education Expenses	24013000002	26 Aug 2024 Port Vila	Make payment Approved
TWDR24081200002 LEAD24081200002		Maintenance Disability Allowance	24013000001	12 Aug 2024 Port Vila	Obtain Court Order Approved

Search Criteria:

1. Click **Search** button, **Trust Withdrawal Search** pop up will be displayed, wherein the user can search based on the given parameters.
2. Enter/Select any of the fields among **Trust Withdrawal Search** criteria.



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Trust Withdrawal Search

Trust Withdrawal Ref No	Lead No All	Guardian Name
Withdrawal Type All	Withdrawal Sub Type All	Applied Branch
Applied Date	Entered By	Entered Date
Withdrawal From Amount 0	Withdrawal To Amount 0	Application Status All
Application Stage All	Action Status All	Assigned Officer All

3. Click the **Search** icon on top of the pop up to get corresponding results.
4. Click the **Clear** icon next to the search icon to clear all the entered values in the fields.
5. Click the **Open** icon under the action column directly or check the checkbox near the **Trust Withdrawal Ref No** and click the **Open** icon in the table header to navigate to the **Trust Withdrawal detail** screen.

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Showing: 1 - 5 of 5 Entries | 25 | < 1 > Select Lead No

<input type="checkbox"/> Trust Withdrawal Ref No Lead No	Beneficiary Name Guardian Name	Withdrawal Type Withdrawal Sub Type	Trust Application No	Entered Date Entered By Applied Branch	Application Stage Action Status Assigned Officer	
<input checked="" type="checkbox"/> TWDR24090300002 LEAD24090200002	Christiano Guardian	Education Education Expenses	24013000001	03 Sep 2024 Port Vila	Verify Documents Pending Approval	
<input type="checkbox"/> TWDR24090300001 LEAD24090300001	Christiano Guardian	Education Education Expenses	43434	03 Sep 2024 Port Vila	Approval of Withdraw (below Threshold) Approved	
<input type="checkbox"/> TWDR24090200001 LEAD24090200002		Maintenance Disability Allowance	9298	02 Sep 2024 Port Vila	Receiving Supporting Documents Cancelled	
<input type="checkbox"/> TWDR24081200003 LEAD24081200003		Education Education Expenses	24013000002	26 Aug 2024 Port Vila	Make payment Approved	
<input type="checkbox"/> TWDR24081200002 LEAD24081200002		Maintenance Disability Allowance	24013000001	12 Aug 2024 Port Vila	Obtain Court Order Approved	



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6. If want to open multiple details then click select all checkbox in the table header and click the **Open** icon in the table header.
7. Select the page number to directly go to that particular page.
8. Click the **Next (>)** button on the top right corner to navigate to the next page.
9. Click the **Previous (<)** button on the top right corner to navigate to the previous page.
10. Select the Records count on the top right corner to show the required number of records per page.

Create New Trust Application:

11. To create a new Trust Withdrawal select the Lead No from the Drop-down list and Click Add Button.

The screenshot displays the 'Trust Withdrawal' application interface. On the left is a sidebar with navigation icons for Admin, My Diary, My Task, Files, Organization, CRM, Trust, and Will. The main area shows a table with columns: Trust Withdrawal Ref No (Lead No), Beneficiary Name (Guardian Name), Withdrawal Type (Withdrawal Sub Type), Trust Application No, Entered Date (Entered By | Applied Branch), and Application Stage (Action Status | Assigned O). A dropdown menu is open for 'Select Lead No', showing options LEAD24090300001 and LEAD24090300009. The table contains five entries, with the first one selected.

Trust Withdrawal Ref No Lead No	Beneficiary Name Guardian Name	Withdrawal Type Withdrawal Sub Type	Trust Application No	Entered Date Entered By Applied Branch	Application Stage Action Status Assigned O
<input checked="" type="checkbox"/> TWDR24090300002 LEAD24090200002	Christiano Guardian	Education Education Expenses	24013000001	03 Sep 2024 Port Vila	Verify Documents Pending Approval
<input type="checkbox"/> TWDR24090300001 LEAD24090300001	Christiano Guardian	Education Education Expenses	43434	03 Sep 2024 Port Vila	Approval of Withdrawal (Withdrawal) Approved
<input type="checkbox"/> TWDR24090200001 LEAD24090200002		Maintenance Disability Allowance	9298	02 Sep 2024 Port Vila	Receiving Supporting Documents Cancelled
<input type="checkbox"/> TWDR24081200003 LEAD24081200003		Education Education Expenses	24013000002	26 Aug 2024 Port Vila	Make payment Approved
<input type="checkbox"/> TWDR24081200002 LEAD24081200002		Maintenance Disability Allowance	24013000001	12 Aug 2024 Port Vila	Obtain Court Order Approved

12. Trust Withdrawal Add New Popup will display, Select the Trust Withdrawal Type , Sub Type , Organization , Mode Of Application , Payment Mode , Withdrawal Mode from DDL.
13. If the Withdrawal By Organization checkbox is selected, enter the reason.



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Trust Withdrawal > Add New

Trust Account No --Select-- Type --Select-- Sub Type --Select--

Organization --Select-- Mode Of Application --Select-- Payment Mode --Select--

Withdrawal Mode --Select-- Withdrawal By Organization ☐ Action Status Approved

Application Status Application Created Applied Date 03 Sep 2024 Applied Branch Port Suva

Reason 0 / 250

14. Click **Save** to save the details.

15. Click the **Clear** icon next to the search icon to clear all the entered values in the fields.

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