



Fiji Public Willee Corporation Limited Legal & Other Service Module- User Manual



Legal & Other Service

User Roles: Legal Officer , Accounts Officer

Overview:

This screen allows User to create, search, and open the Legal & Other Service Application. To access this screen, Click on "**Legal**" from the menu, then select "**Legal and Other Service**".

The screenshot displays the 'Legal & Other Service' application interface. On the left is a sidebar menu with icons for 'My Diary', 'My Task', 'Files', 'CRM', 'Trust', and 'Legal'. The main area features a search bar and a table of legal applications. The table has columns for 'Legal App Ref No', 'Applicant Name', 'Applied Branch', 'Application Stage', 'Service Type', and 'Assigned Officer'. The table shows 24 entries, with the first page displaying 8 rows. Each row includes a checkbox for selection. The 'Application Stage' column contains detailed descriptions of the application process, such as 'Handover of the documents', 'Collection of Documentation', and 'Deed Poll'. The 'Service Type' column indicates the status of the application, with 'Approved' shown in green. The 'Assigned Officer' column lists the responsible personnel, including 'Legal Service Officer 2', 'NA', 'Legal Service Officer 1', 'Lavenia Silatolu', and 'Accounts Officer'.

<input type="checkbox"/> Legal App Ref No	Applicant Name Applicant CRM No	Applied Branch Applied Date	Application Stage Application Status	Service Type Action Status	Assigned Officer
<input type="checkbox"/> LEGL24100100005	Sera Gio CUST24092300003	Port Suva 01 Oct 2024	Handover of the documents Fee Payments Verified	Power of Attorney Approved	Legal Service Officer 2
<input type="checkbox"/> LEGL24100100004	Sapina x CUST24090500002	Port Suva 01 Oct 2024	Collection of Documentation Application Created	Preparation of Living Transfer Approved	NA
<input type="checkbox"/> LEGL24100100003	Dumbledore Voldermort CUST24082900006	Port Suva 01 Oct 2024	Collection of Documentation Cancelled	Court Application Approved	Legal Service Officer 1
<input type="checkbox"/> LEGL24100100002	Marcus Staines CUST24090200001	Port Suva 01 Oct 2024	Handover of the documents Documents Provided to the Client	Deed Poll Approved	Lavenia Silatolu
<input type="checkbox"/> LEGL24100100001	Semi Gio CUST24092300002	Port Suva 01 Oct 2024	Handover of the documents Documents Provided to the Client	Letters of Administration Approved	Legal Service Officer 2
<input type="checkbox"/> LEGL2409300005	Peni Gio CUST24092300001	Port Suva 30 Sep 2024	Handover of the documents Documents Provided to the Client	Probate Approved	Legal Service Officer 1
<input type="checkbox"/> LEGL2409300004	Peni Gio CUST24092300001	Port Suva 30 Sep 2024	Fees Collection Document is collected	Preparation of Transfer Documents Approved	Accounts Officer
<input type="checkbox"/> LEGL2409300003	Peni Gio CUST24092300001	Port Suva 30 Sep 2024	Handover of the documents Documents Provided to the Client	Preparation of Living Transfer Approved	Lavenia Silatolu

Search Criteria:

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



Fiji Public Willee Corporation Limited Legal & Other Service Module- User Manual



Legal Ref No	Applicant Name	Applied Branch	Service Type	Applied Date(From)	Applied Date(To)	Application Status	Application Stage	Action Status
LEGL2409300004	CUST24092300001	Port Suva	Document is collected	30 Sep 2024		Approved		Accounts Officer
LEGL2409300003	Peni Qio CUST24092300001	Port Suva	Handover of the documents Documents Provided to the Client	30 Sep 2024		Approved	Preparation of Living Transfer	Lavenia Silatolu

- a. Click the **"Search"** icon on top of the pop up to get corresponding results.
 - b. Click the **"Clear"** icon next to the search icon to clear all the entered/Selected values in the fields.
3. Click the **Close(X)** icon to close the Search Popup.

Legal App Ref No	Applicant Name	Applied Branch	Application Stage	Service Type	Assigned Officer
LEGL24100100005	Sera Qio CUST24092300003	Port Suva	Handover of the documents Fee Payments Verified	Power of Attorney Approved	Legal Service Officer 2
LEGL24100100004	Sapina x CUST24090500002	Port Suva	Collection of Documentation Application Created	Preparation of Living Transfer Approved	NA
LEGL24100100003	Dumbledore Voldermort CUST24082900006	Port Suva	Collection of Documentation Cancelled	Court Application Approved	Legal Service Officer 1
LEGL24100100002	Marcus Stoines CUST24090200001	Port Suva	Handover of the documents Documents Provided to the Client	Deed Poll Approved	Lavenia Silatolu
LEGL24100100001	Semi Qio CUST24092300002	Port Suva	Handover of the documents Documents Provided to the Client	Letters of Administration Approved	Legal Service Officer 2
LEGL2409300005	Peni Qio CUST24092300001	Port Suva	Handover of the documents Documents Provided to the Client	Probate Approved	Legal Service Officer 1
LEGL2409300004	Peni Qio CUST24092300001	Port Suva	Fees Collection Document is collected	Preparation of Transfer Documents Approved	Accounts Officer
LEGL2409300003	Peni Qio CUST24092300001	Port Suva	Handover of the documents Documents Provided to the Client	Preparation of Living Transfer Approved	Lavenia Silatolu
LEGL2409300002	Peter Andrew Williams CUST24092300004	Port Suva	Handover of the documents Fee Payments Verified	Court Application Approved	Legal Service Officer 1
LEGL2409300001	Peni Qio CUST24092300001	Port Suva	Handover of the documents Documents Provided to the Client	Preparation of Deed Approved	Lavenia Silatolu
LEGL24092700002	Caleb David Villarreal CUST24081200005	Port Suva	Handover of the documents Documents Provided to the Client	Court Application Approved	Lavenia Silatolu
LEGL24092700001	Emily Grace Johnson CUST2410200001	Port Suva	Handover of the documents Documents Provided to the Client	Court Application Approved	Lavenia Silatolu
LEGL24092600001		Port Suva	Collection of Documentation Application Created	Court Application Approved	NA
LEGL24092500001	345 34 CUST23121900003	Port Suva	Handover of the documents Documents Provided to the Client	Court Application Approved	Lavenia Silatolu

4. Click the **"Open"** icon under the action column directly or check the checkbox near the Will Application number and click the **"Open"** icon in the table header to navigate to the Will Application detail screen.



Fiji Public Willee Corporation Limited Legal & Other Service Module- User Manual



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

Create New Will Application:

10. To create a New Legal Application select the **Lead No** from the Drop-down list and Click **Add** Button.

The screenshot displays the 'Legal & Other Service' module interface. On the left is a sidebar with navigation icons for My Diary, My Task, Files, CRM, Trust, and Legal. The main area features a table with columns: Legal App Ref No, Applicant Name, Applied Branch, Application Stage, Service Type, and Action Status. A search bar is at the top left, and pagination controls (Showing 1 - 24 of 24 Entries, 25, 1) are at the top right. A dropdown menu is open on the right, showing a list of lead numbers (LEAD24100100003, LEAD24092700008, etc.) with a checkmark next to LEAD24100100003. The table contains 24 rows of application data.

Legal App Ref No	Applicant Name Applicant CRM No	Applied Branch Applied Date	Application Stage Application Status	Service Type Action Status	
<input type="checkbox"/> LEGL24100100005	Sera Qio CUST24092300003	Port Suva 01 Oct 2024	Handover of the documents Fee Payments Verified	Power of Attorney Approved	As LEAD24092700010
<input checked="" type="checkbox"/> LEGL24100100004	Sapina x CUST24090500002	Port Suva 01 Oct 2024	Collection of Documentation Application Created	Preparation of Living Transfer Approved	NA LEAD24092700013
<input type="checkbox"/> LEGL24100100003	Dumbledore Voldermort CUST24082900006	Port Suva 01 Oct 2024	Collection of Documentation Cancelled	Court Application Approved	Le LEAD24092700016
<input type="checkbox"/> LEGL24100100002	Marcus Staines CUST24090200001	Port Suva 01 Oct 2024	Handover of the documents Documents Provided to the Client	Deed Poll Approved	La LEAD24100100002
<input type="checkbox"/> LEGL24100100001	Semi Qio CUST24092300002	Port Suva 01 Oct 2024	Handover of the documents Documents Provided to the Client	Letters of Administration Approved	Le LEAD24100100003
<input type="checkbox"/> LEGL24093000005	Peri Qio CUST24092300001	Port Suva 30 Sep 2024	Handover of the documents Documents Provided to the Client	Probate Approved	Legal Service Officer 1
<input type="checkbox"/> LEGL24093000004	Peri Qio CUST24092300001	Port Suva 30 Sep 2024	Fees Collection Document is collected	Preparation of Transfer Documents Approved	Accounts Officer
<input type="checkbox"/> LEGL24093000003	Peri Qio CUST24092300001	Port Suva 30 Sep 2024	Handover of the documents Documents Provided to the Client	Preparation of Living Transfer Approved	Lavenia Silatolu
<input type="checkbox"/> LEGL24093000002	Peter Andrew Williams CUST24092300004	Port Suva 30 Sep 2024	Handover of the documents Fee Payments Verified	Court Application Approved	Legal Service Officer 1
<input type="checkbox"/> LEGL24093000001	Peri Qio CUST24092300001	Port Suva 30 Sep 2024	Handover of the documents Documents Provided to the Client	Preparation of Deed Approved	Lavenia Silatolu
<input type="checkbox"/> LEGL24092700002	Caleb David Villarreal CUST24081200005	Port Suva 27 Sep 2024	Handover of the documents Documents Provided to the Client	Court Application Approved	Lavenia Silatolu
<input type="checkbox"/> LEGL24092700001	Emily Grace Johnson CUST2410200001	Port Suva 27 Sep 2024	Handover of the documents Documents Provided to the Client	Court Application Approved	Lavenia Silatolu
<input type="checkbox"/> LEGL24092600001		Port Suva 26 Sep 2024	Collection of Documentation Application Created	Court Application Approved	NA
<input type="checkbox"/> LEGL24092500001	345 34 CUST23121900003	Port Suva 25 Sep 2024	Handover of the documents Documents Provided to the Client	Court Application Approved	Lavenia Silatolu

11. The **“Legal Service Add New”** popup will be displayed. Then, select the Type from the drop-down list and enter the following details: Stage, Action Status, Application Status, Applied By, Applied Date, and Applied Branch.



Fiji Public Willee Corporation Limited Legal & Other Service Module- User Manual



The screenshot displays the 'Legal & Other Service' module interface. A table lists legal applications with columns for Legal App Ref No, Applicant Name, Applied Branch, Application Stage, Service Type, and Assigned Officer. A pop-up form titled 'Legal Service > Add New' is overlaid on the table, showing fields for Type, Stage, Action Status, Application Status, Applied Date, and Applied Branch.

Legal App Ref No	Applicant Name Applicant CRM No	Applied Branch Applied Date	Application Stage Application Status	Service Type Action Status	Assigned Officer
LEGL24100100005	Sera Qio CUST24092300003	Port Suva 01 Oct 2024	Handover of the documents Fee Payments Verified	Power of Attorney Approved	Legal Service Officer 2
LEGL24093000001	Peni Qio CUST24092300001	Port Suva 30 Sep 2024	Handover of the documents Documents Provided to the Client	Preparation of Deed Approved	Lavenia Silatolu
LEGL24092700002	Caleb David Villarreal CUST24081200005	Port Suva 27 Sep 2024	Handover of the documents Documents Provided to the Client	Court Application Approved	Lavenia Silatolu
LEGL24092700001	Emily Grace Johnson CUST2410200001	Port Suva 27 Sep 2024	Handover of the documents Documents Provided to the Client	Court Application Approved	Lavenia Silatolu
LEGL24092600001		Port Suva 26 Sep 2024	Collection of Documentation Application Created	Court Application Approved	NA
LEGL24092500001	345 34 CUST23121900003	Port Suva 25 Sep 2024	Handover of the documents Documents Provided to the Client	Court Application Approved	Lavenia Silatolu

12. Click the **"Save"** button to navigate to the Legal & Other Service Details Screen.
13. Click the **"Clear"** icon next to the search icon to clear all the Selected values in the fields.
14. Click the **"Close"** button to close the Legal Service Add New pop-up.

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