



Fiji Public Trustee Corporation Limited Trust Module- User Manual



Trust Settlement

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 Settlement**.

The screenshot displays the 'Trust Settlement' interface. On the left is a sidebar menu with icons for Admin, My Diary, My Task, Files, Organization, CRM, Trust (highlighted), Will, Estate, Legal, and Finance. The main area features a table with columns: Trust Settlement Ref No (Lead No), Beneficiary Name (Guardian Name), Trust Account No, Entered Date (Entered By | Applied Branch), and Application Stage (Action Status | Assigned Officer). The table contains three rows of data. Above the table is a search bar and pagination controls showing 'Showing: 1 - 3 of 3 Entries' and a 'Select Lead No' dropdown.

Trust Settlement Ref No Lead No	Beneficiary Name Guardian Name	Trust Account No	Entered Date Entered By Applied Branch	Application Stage Action Status Assigned Officer
<input type="checkbox"/> TSMR24090300002 LEAD24090300010		2401300003	03 Sep 2024 Trust Officer 4 Port Vila	Approval of Settlement Pending Approval Registry Clerk
<input type="checkbox"/> TSMR24090300001 LEAD24090300002		4565	03 Sep 2024 Trust Officer 11 Port Vila	Approval of Settlement Pending Approval AT23 GP
<input type="checkbox"/> TSMR24090200014 LEAD24090200003		45636	02 Sep 2024 Trust Officer 11 Port Vila	Execute Memorandum of Discharge Approved Registry Clerk

Search Criteria:

1. Click **Search** button, **Trust Settlement 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 Settlement Search** criteria.



Fiji Public Trustee Corporation Limited Trust Module- User Manual



Trust Settlement Search

Trust Settlement Ref No	Trust Account No	Lead No
Guardian Name	Applied Branch	Applied Date
Entered By	Entered Date	Settlement From Amount 0
Settlement To Amount 0	Application Status	Application Stage
Action Status	Assigned Officer	

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 Settlement Ref No** and click the **Open** icon in the table header to navigate to the **Trust Settlement detail** screen.

Showing: 1-3 of 3 Entries | 25 | < 1 > Select Lead No

<input type="checkbox"/>	Trust Settlement Ref No	Beneficiary Name	Trust Account No	Entered Date	Application Stage	
<input checked="" type="checkbox"/>	Lead No TSMR24090300002 LEAD24090300010	Guardian Name	2401300003	03 Sep 2024 Entered By Applied Branch Trust Officer 4 Port Vila	Approval of Settlement Approval of Settlement Pending Approval Registry Clerk	<input type="checkbox"/>
<input checked="" type="checkbox"/>	TSMR24090300001 LEAD24090300002		4565	03 Sep 2024 Trust Officer 1 Port Vila	Approval of Settlement Pending Approval AT23 GF	<input type="checkbox"/>
<input checked="" type="checkbox"/>	TSMR24090200014 LEAD24090200003		45636	02 Sep 2024 Trust Officer 1 Port Vila	Execute Memorandum of Discharge Approved Registry Clerk	<input type="checkbox"/>



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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 Settlement and select the Lead No from the Drop-down list and Click Add Button.

The screenshot displays the 'Trust Settlement' application interface. On the left is a sidebar with navigation icons for Admin, My Diary, My Task, Files, Organization, CRM, Trust (highlighted), Will, Estate, Legal, and Finance. The main area shows a table with columns: Trust Settlement Ref No, Lead No, Beneficiary Name, Guardian Name, Trust Account No, Entered Date, Entered By | Applied Branch, and Application Stage. A dropdown menu is open for 'Select Lead No', showing options LEAD24090300010 and LEAD24090300012. The table contains three rows of data.

Trust Settlement Ref No	Lead No	Beneficiary Name	Guardian Name	Trust Account No	Entered Date	Entered By Applied Branch	Application Stage
TSMR24090300002	LEAD24090300010			2401300003	03 Sep 2024	Trust Officer 4 Port Vila	Approval of Settlement Action Status Assigned Officer
TSMR24090300001	LEAD24090300002			4565	03 Sep 2024	Trust Officer 1 Port Vila	Approval of Settlement Pending Approval Registry Clerk
TSMR24090200014	LEAD24090200003			45636	02 Sep 2024	Trust Officer 1 Port Vila	Approval of Settlement Pending Approval AT23 GF Execute Memorandum of Discharge Approved Registry Clerk

12. Trust Settlement Add New Popup will display, Select the Trust Account No , Payment Mode , Mode Of Application , Withdrawal Mode , Payment Option from DDL.
13. If the Payment Option “Overseas” is selected, you need to enter Bank Address details.
14. If the Payment Option “Domestic” is selected , Not required to enter Bank Address Details.



Fiji Public Trustee Corporation Limited Trust Module- User Manual



Trust Settlement

Showing 1 - 3 of 3 Entries | 25 | 1 | LEAD24090300012

Trust Settlement Ref No	Beneficiary Name	Trust Account No	Entered Date	Application Stage
Lead No	Guardian Name		Entered By Applied Branch	Action Status Assigned Officer
TSMR24090300002		2401300003	03 Sep 2024	Approval of Settlement
LEAD24090300002				
TSMR24090300002				
LEAD24090300002				
TSMR24090300002				
LEAD24090300002				

Trust Settlement > Add New

Trust Account No * --Select--

Payment Mode * --Select--

Mode Of Application * --Select--

Withdrawal Mode * --Select--

Payment Options * --Select--

Action Status

Application Status

Applied Date

Applied Branch

Reason

Application Created

03 Sep 2024

Port Suva

0 / 250

15. Click **Save** to save the details.
16. Click the **Clear** icon next to the search icon to clear all the entered values in the fields.
17. Click on the **"Close"** button to close the popup.

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