



## Fiji Public Trustee Corporation Limited CRM Module- User Manual



### Account

**User : Trust Officer, Estate Officer, Met,TI,Accounts officer**

This screen helps to Search and View the Accounts. To navigate to this screen click on the **Files** from the menu and click **Account**.

Account No	Customer	File No	Account Type	Created Date	Status
86767	Rabin R	565656565	Non-Cash	03 Sep 2024	Active
456789012345	Josua Naliva	TRAP2408300002	Cash	30 Aug 2024	Active
323434343434343	ITGAdmin I	35545645	Cash	29 Aug 2024	Active
789012345678	Sereana Koroi	TRAP240829	Cash	29 Aug 2024	Active
345678901234	Sereana Koroi	TRAP24082800002	Cash	29 Aug 2024	Active
786767	Ganesh Kumar ppppppp	57-8	Common	28 Aug 2024	Active
89876	Sindhu ddf	57-8	Cash	28 Aug 2024	Active
67878	Roger Black	57-8	Cash	28 Aug 2024	Active
4343434	Ganesh Kumar ppppppp	57-8	Cash	28 Aug 2024	Active
5457777777	siddarth s	4657jh-89/8	Non-Cash	28 Aug 2024	Active
3433	James robert	4657jh-89/8	Cash	28 Aug 2024	Active
43434	Demo Test DT	4657jh-89/8	Cash	28 Aug 2024	Active
88787	Sindhu ddf	gh-878/887	Common	27 Aug 2024	Active
4565	meena p	gh-878/887	Cash	27 Aug 2024	Active
577	fsdd fdfff	gh-878/887	Non-Cash	27 Aug 2024	Active
23453	fsdd fdfff	gh-878/887	Cash	27 Aug 2024	Active
688	Timaina T Vakuruivalu	r56-77/7	Non-Cash	14 Aug 2024	Active
776678	Kirtan Lal	r56-77/7	Cash	14 Aug 2024	Active

### Search Criteria

1. Click **Search** button, **Account Search** pop up will be displayed, wherein the user can search based on the given parameters.

Accounts

Admin

My Diary

My Task

Files

Organization

CRM

Trust

Will

Estate

Legal

Finance

Task Search

Account No

Account Type

Customer

File No

Date

Status

All

All

All

All

(From)

(To)

All

Showing: 1 - 25 of 37 Entries

25

1

2

Created Date

Status

3433	James robert	4657j-89/B	Cash	28 Aug 2024	Active
43434	Demo Test DT	4657j-89/B	Cash	28 Aug 2024	Active
88787	Sindhu dldf	gh-878/887	Common	27 Aug 2024	Active
4565	meena p	gh-878/887	Cash	27 Aug 2024	Active
577	fsdd tldf	gh-878/887	Non-Cash	27 Aug 2024	Active
23453	fsdd tldf	gh-878/887	Cash	27 Aug 2024	Active
688	Timaima T Vakuruivalu	r56-777	Non-Cash	14 Aug 2024	Active
776678	Kirtan Lal	r56-777	Cash	14 Aug 2024	Active

2. Enter/Select any of the fields among Account No , Account Type , Customer , File No , Date (From) , Date (To) , Status.

Accounts

Admin

My Diary

My Task

Files

Organisation

CRM

Trust

Will

Estate

Legal

Finance

Accounts

Task Search

Account No

Account Type

Customer

File No

Date (From)

Date (To)

Status

All

Demo Test DT

All

Active

Showing 1-1 of 1 Entries

25

1

Status

Active

3. Click the **Search** icon on top of the pop up to get corresponding results.



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The screenshot shows the 'Accounts' module interface. On the left is a sidebar with navigation icons for Admin, My Diary, My Task, Files, Organization, CRM, Trust, Will, Estate, Legal, and Finance. The main area displays a table with columns: Account No, Customer, File No, Account Type, Created Date, and Status. A single record is visible.

Account No	Customer	File No	Account Type	Created Date	Status
43434	Demo Test DT	4657jh-89/8	Cash	28 Aug 2024	Active

4. Click the **Clear** icon next to the search icon to clear all the entered values in the fields.
5. Click the **Close** button to exit the search panel.
6. Select the page number to directly go to that particular page.

The screenshot shows the 'Accounts' module interface with a list of records. A dropdown menu is open next to the 'Showing 1-25 of 37 Entries' text, displaying options for 10, 25, 50, and 100 records per page. The table has columns: Account No, Customer, File No, Account Type, Created Date, and Status.

Account No	Customer	File No	Account Type	Created Date	Status
86767	Rabin R	5656565655	Non-Cash	03 Sep 2024	
456789012345	Josua Naliva	TRAP2408300002	Cash	30 Aug 2024	
323434343434343	ITGAdmin I	35545645	Cash	29 Aug 2024	Active
789012345678	Sereana Koroi	TRAP240829	Cash	29 Aug 2024	Active
345678901234	Sereana Koroi	TRAP24082800002	Cash	29 Aug 2024	Active
786767	Ganesh Kumar ppppppp	57-8	Common	28 Aug 2024	Active
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67878	Roger Black	57-8	Cash	28 Aug 2024	Active
4343434	Ganesh Kumar ppppppp	57-8	Cash	28 Aug 2024	Active
5457777777	siddarth s	4657jh-89/8	Non-Cash	28 Aug 2024	Active
3433	James robert	4657jh-89/8	Cash	28 Aug 2024	Active
43434	Demo Test DT	4657jh-89/8	Cash	28 Aug 2024	Active
88787	Sindhu dldf	gh-878/887	Common	27 Aug 2024	Active
4565	meena p	gh-878/887	Cash	27 Aug 2024	Active
577	fsdd fdldf	gh-878/887	Non-Cash	27 Aug 2024	Active
23453	fsdd fdldf	gh-878/887	Cash	27 Aug 2024	Active
688	Timaina T Vakuruivalu	r56-77/7	Non-Cash	14 Aug 2024	Active
776678	Kirtan Lal	r56-77/7	Cash	14 Aug 2024	Active

7. Click the **>** button on the top right corner to navigate to the next page.
8. Click the **<** 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.

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