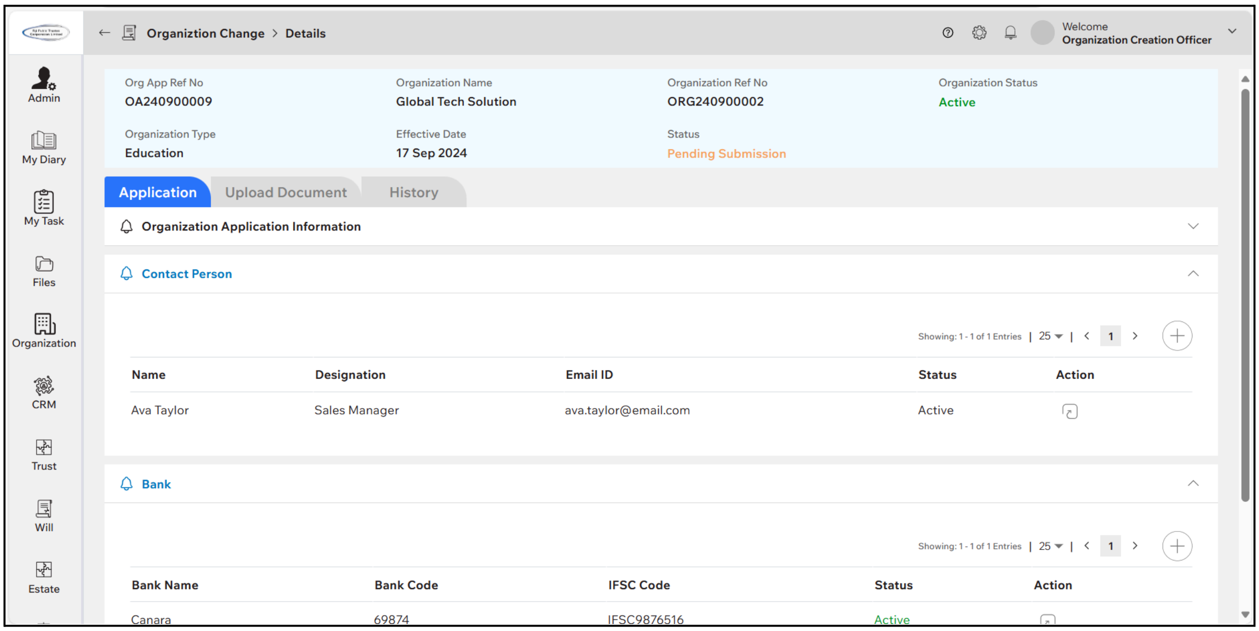
Fiji Public Trustee Corporation Limited
Organization Module- User Manual

Organization Change In Detail

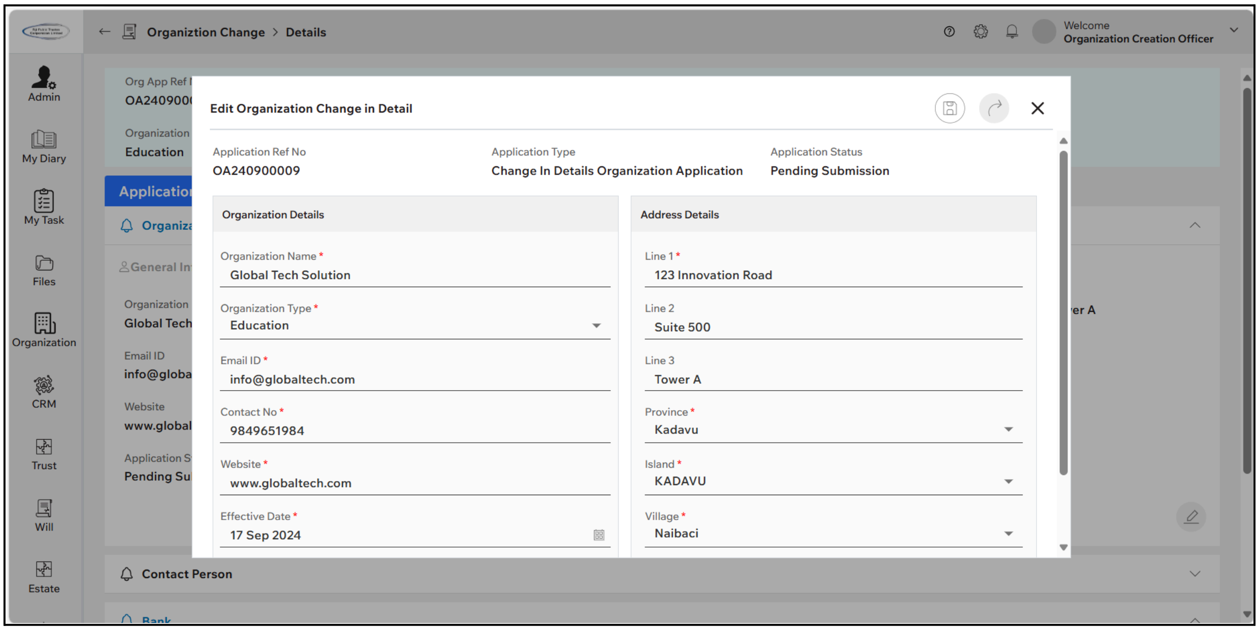
Users: Organization Creation Officer, Organization Verification Officer.



Application Tab

Organization Application Information Section:

1. Click On **Edit** button to open Edit **Organization Change in Detail** Popup.



2. Enter/Select Organization Name, Organization Type, Email ID, Contact No, Website, Effective Date and Organization Status.

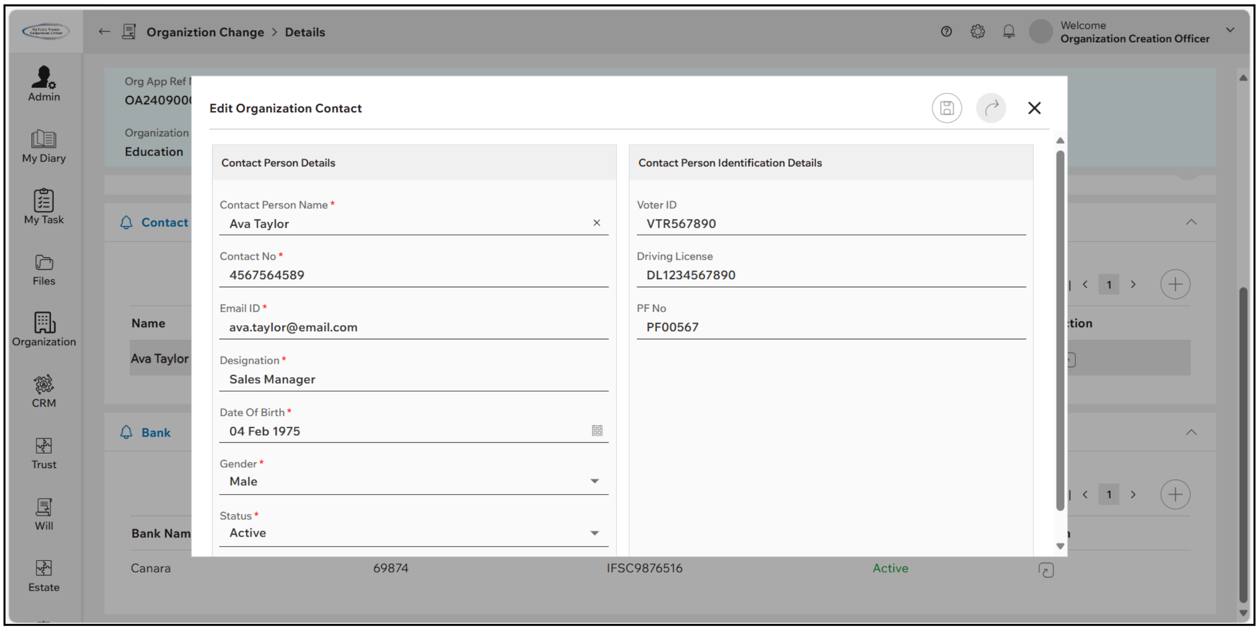
3. Enter/Select Line 1, Line 2, Line 3, Province, Island, Village, Location, Area and PO Box No.

4. Click the **Update** button to save the changes.

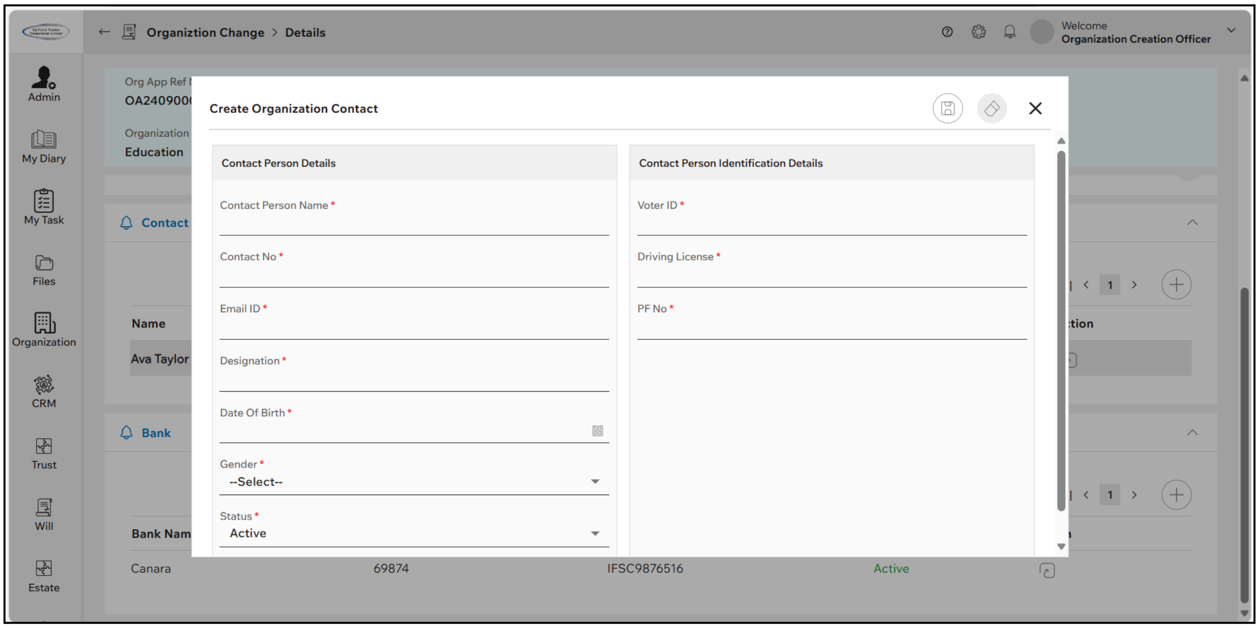
5. Click the **Refresh** button to refresh all the entered previous values.

Contact Person Section:

1. Click on “**Action**” to navigate to the “**View Organization Contact**” pop-up screen.



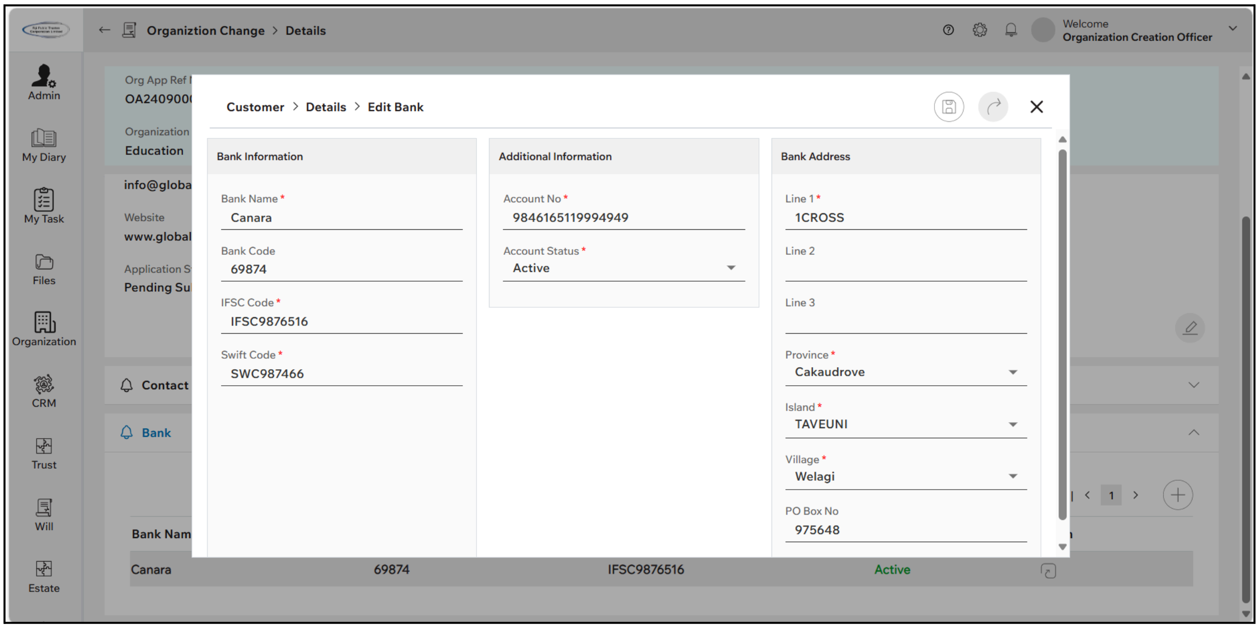
2. Click On **Edit** button to open **Edit Organization Contact** Popup.
3. Enter/Select Contact Person Name, Contact No, Email ID, Designation, Date Of Birth, Gender and Status.
4. Enter the Contact Person Identification Details such as National ID, Voter ID, Driving License No and PF No any one will be entered.
5. Click the **Refresh** button to refresh all the entered previous values.
6. Click the **Update** button to save the changes.
7. Click the **Add** button to add the Contact Person Details.



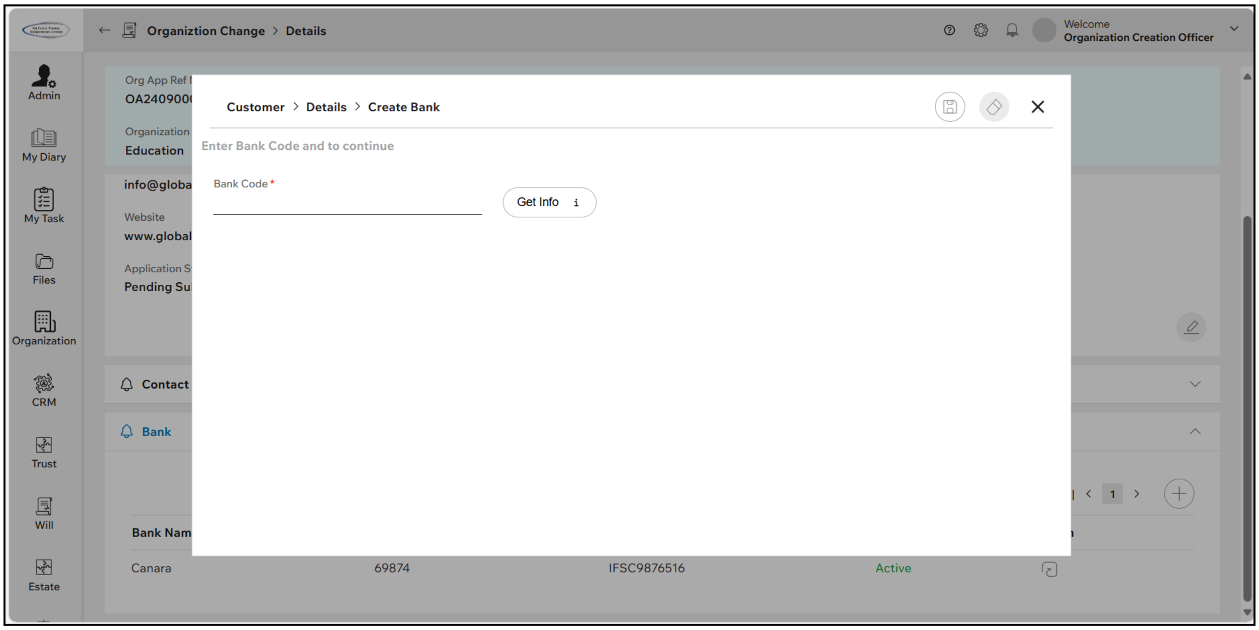
8. Enter/Select Contact Person Name, Contact No, Email ID, Designation, Date Of Birth, Gender and Status.
9. Enter the Contact Person Identification Details such as National ID, Voter ID, Driving License No and PF No any one will be entered.
10. Click the **Save** button to save the entered Contact Person Details.
11. Click the **Clear** button to clear all entered Contact Person Details.
12. Click the **Back** button to go back to the previous screen.
13. The saved details will be displayed as a list in the left panel. On clicking the record, its details will be displayed on the right panel.

Bank Section:

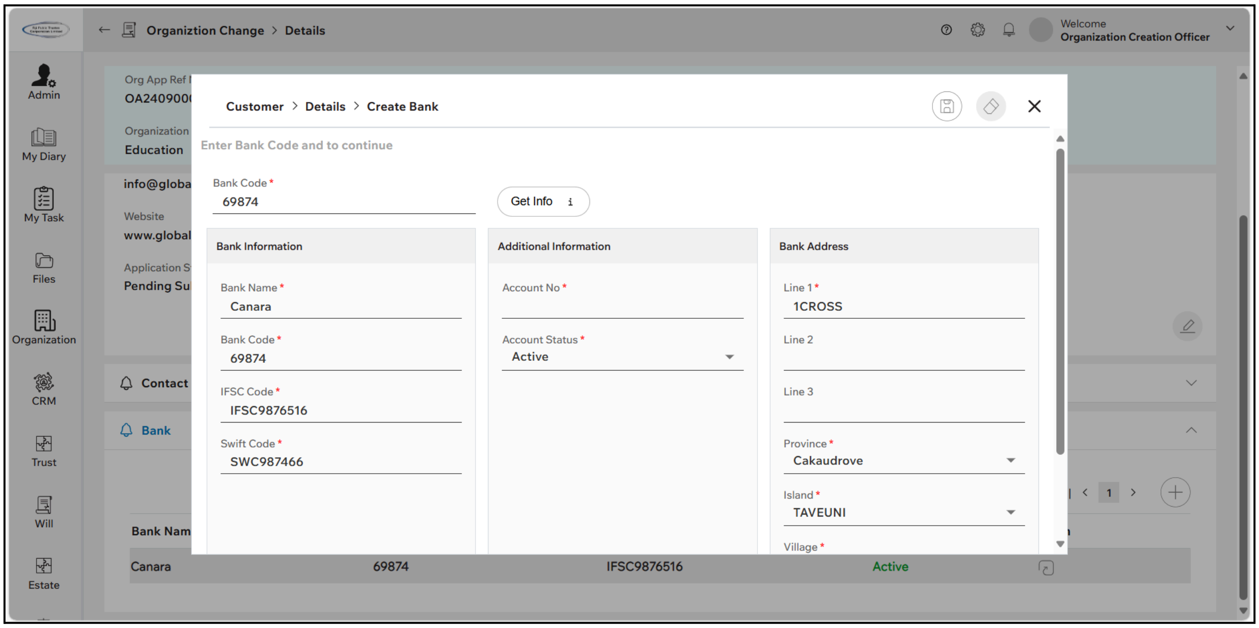
1. Click on "**Action**" to navigate to the "**Customer Details View Bank**" pop-up screen.
2. Click On **Edit** button to open **Customer Details View Bank** Popup.



3. Enter/Select Swift Code, Bank Name, Branch Name, Account Number, Routing No, Status, Organization Bank Status, Line 1, Line 2, Line 3, Province, Island, Village, Location, Area and PO Box No.
4. Click the **Refresh** button to refresh all the entered previous values.
5. Click the **Update** button to save the changes.
6. Click **Add** button, initially Bank Code text field will be displayed with Get button.



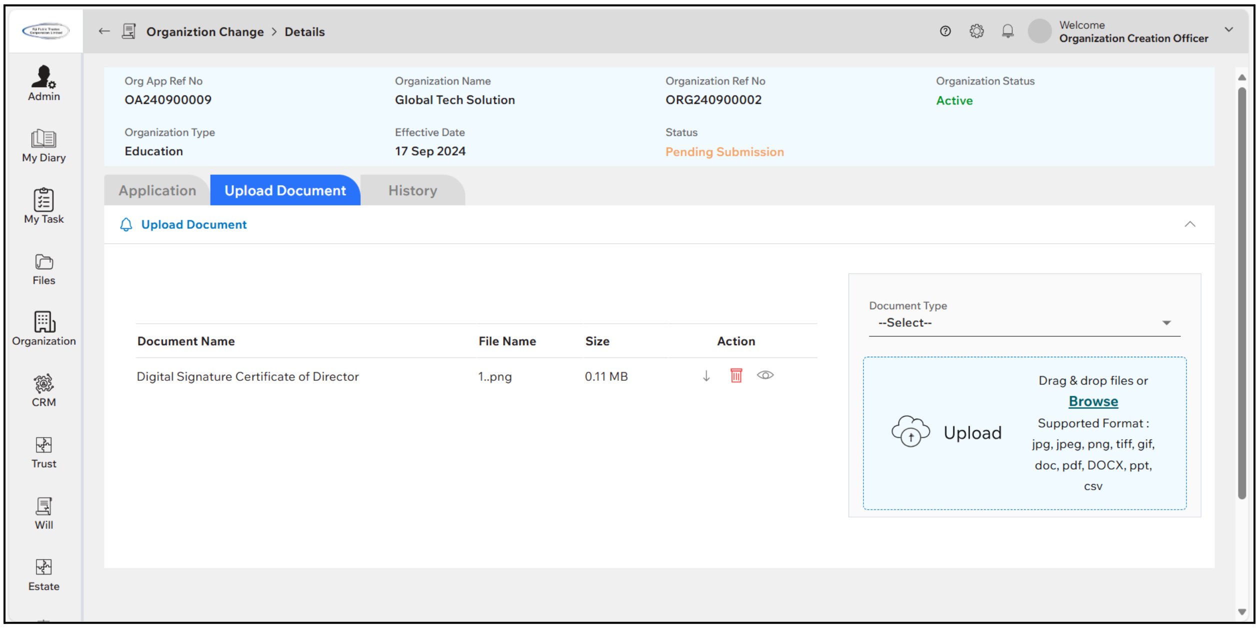
7. Enter Bank Code. If Bank Code already exists in the Bank Master screen then Bank details will get populated automatically and a text field to enter Account No will be displayed on clicking **Get** button.
8. Click the **Get** button.
9. If Bank code does not exist in the Bank Master Screen then fields to enter all the details will be displayed.



10. On Clicking the Get button, the following fields will be displayed: Swift Code, Bank Code, Bank Name, Branch Name, Account Number, Routing No, Status, Organization Bank Status, Line 1, Province, Island, Village, Location, Area and PO Box No.
11. Enter/Select Swift Code, Bank Name, Branch Name, Account Number, Routing No, Status, Organization Bank Status, Line 1, Line 2, Line 3, Province, Island, Village, Location, Area and PO Box No.
12. Click the **Save** button to save the Bank details.
13. Click the **Clear** button to clear all the entered Bank Details.
14. The saved details will be displayed as a list in the left panel. On clicking the record, its details will be displayed on the right panel.

Upload Document Tab

1. View the uploaded document in the New organization application.
2. Select the Document Type and Click the Document Upload tab to upload the required document.



3. Click the **Select** button to upload the required document.
4. Click the **Clear** button to clear the Uploaded document.
5. Click the **Download** button to download the uploaded document.
6. Click the **View** button to view the uploaded document.

History Tab

Notes Section:

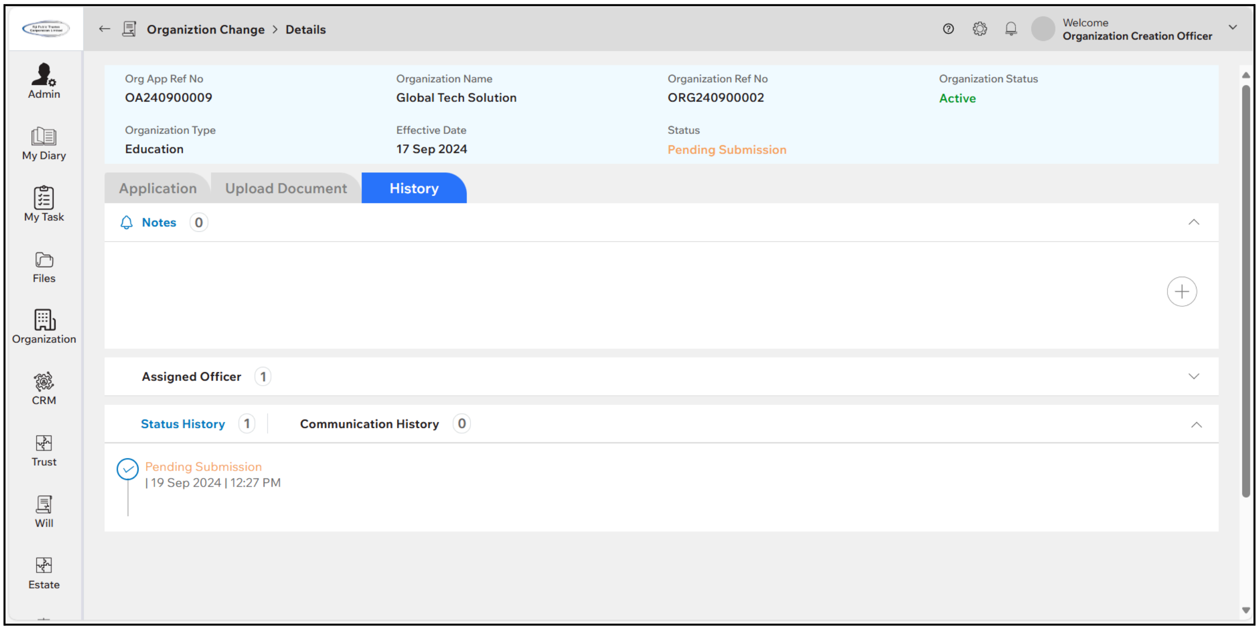
User: Organization Creation Officer

1. To change the status,

   A. In the Notes tab, select the status as "Pending Verification" and add notes and click the **Save** button.

   B. The status will be changed from "Pending Submission" to "Pending Verification".

C. After changing the Pending verification status, the request will be assigned automatically to the Organization Verification Officer and a mail notification will be sent.



User: Organization Verification Officer

1. To change the status,

A. In the Notes tab, select the status as “Pending Approval” and add notes and click the **Save** button.

B. The status will be changed from “Pending Verification” to “Pending Approval”.

C. After changing the Pending Approval status, the request will be assigned automatically to the Organization Approving Officer and a mail notification will be sent.

User: Organization Approving Officer

1. To change the status,

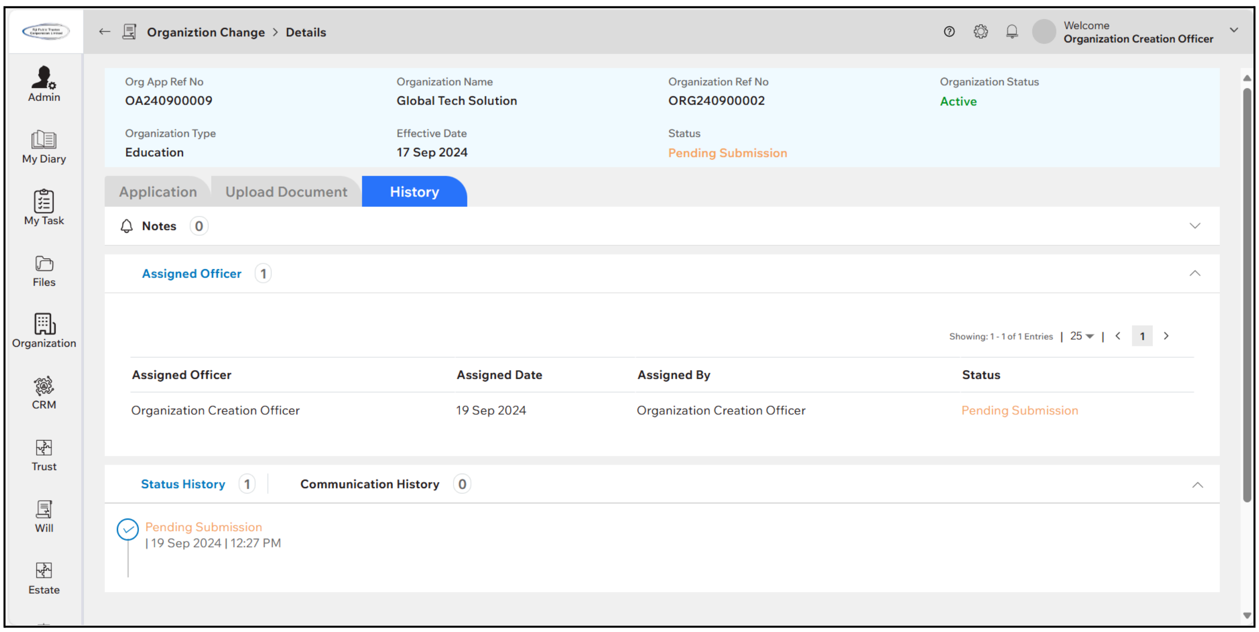
A. In the Notes tab, select the status as “Approved” and add notes and click the **Save** button.

B. The status will be changed from "Pending Approval" to "Approved" and Organization Application will be approved.

C. The Approved Organization Application will be displayed in the Registered Organization screen. Organization Ref No will be generated and mail notification will be sent to the Organization.

Assigned Officer Section:

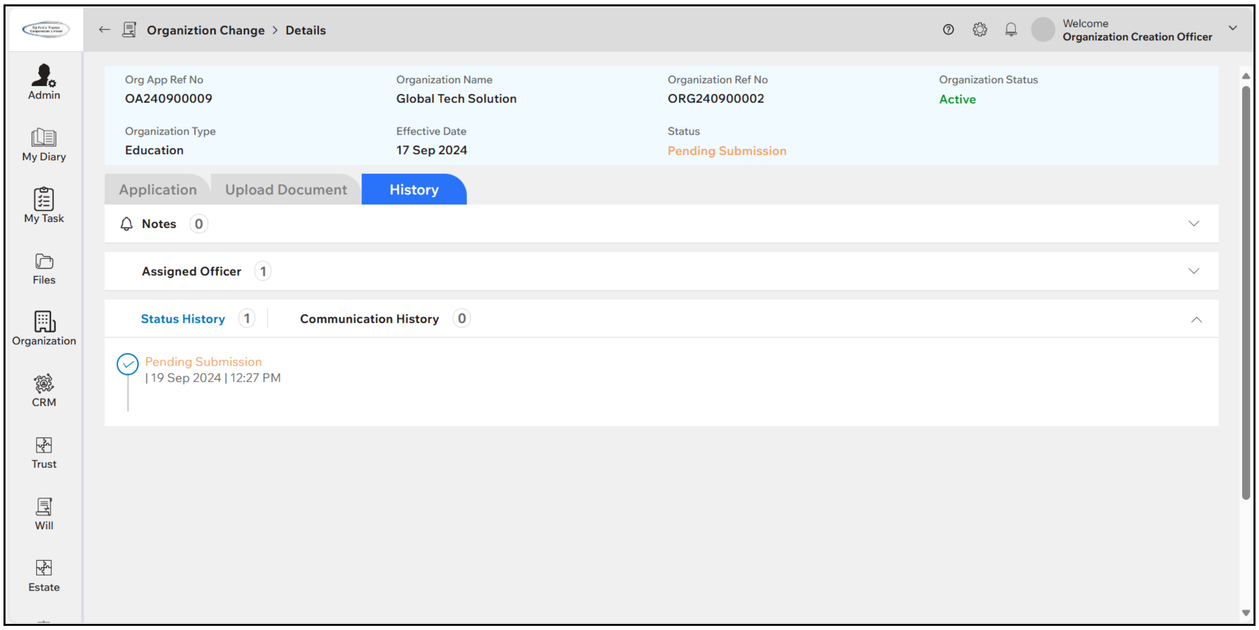
1. Officers auto-assigned based on each status change will be created and shown in this tab.
2. Officers can reassign to any other officer in the same group. To Reassign, select the Officer Name and click the **ReAssign** button.



3. Assigned Officer, Assigned Date, Assigned By and Status will be displayed.

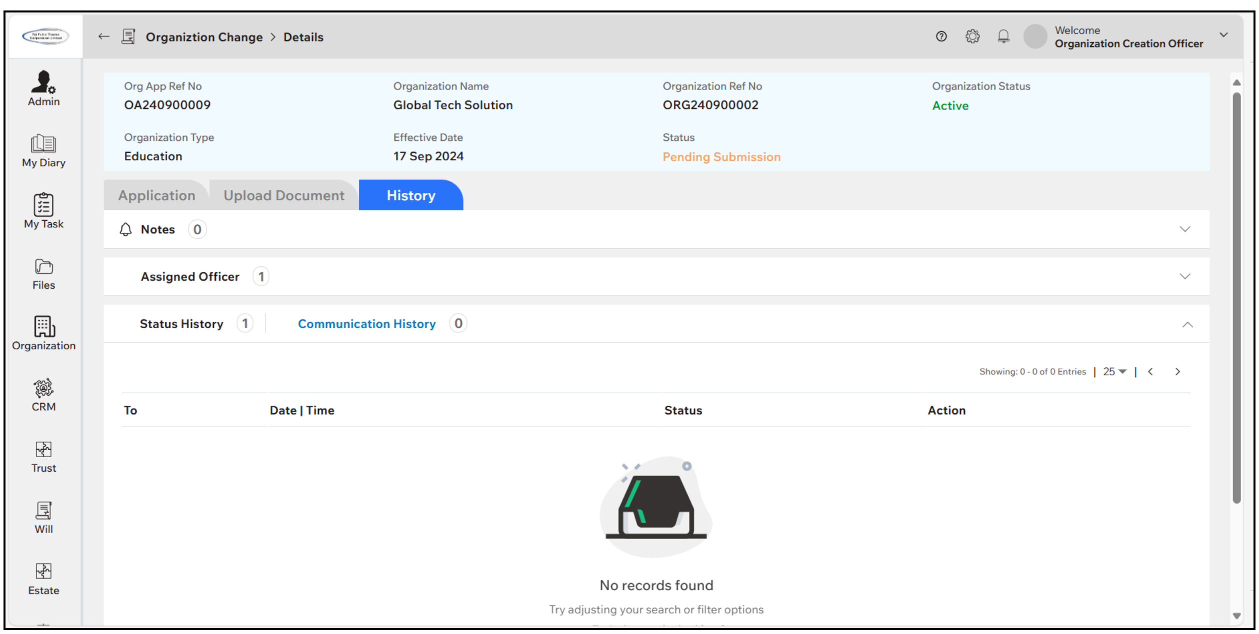
Status History Section:

Status History will be created against each status change and maintained in this tab.



Communication History Section:

Email sent against each status change will be maintained in the Email History tab. On the right panel, a detailed view of the email sent will be displayed.



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