



Fiji Public Trustee Corporation Limited Admin Module- User Manual



User Request Detail

User : superadmin

This screen helps to view, add and modify the user request detail.

User Request > Details

Admin

My Task

Organization

CRM

Trust

Will

Estate

Legal

Sales

Name

Request Ref No

Employee Code

Contact No

Email ID

Status

santhakumar.itgalax@gmail.com

7658795365

User Details

Employment Details

Enter Employee Code

User Details

User Name *

santha.kumar

First Name *

Customer

Middle Name

Service

Last Name *

Officer 2

Gender *

Male

Date Of Birth *

14 Dec 1996

Contact Details

Email ID *

santhakumar.itgalax@gmail.com

Contact No *

7658795365

Family Details

Father Name

Gopal

Mother Name

Gowari

Marital Status

Married

Spouse Name

Swathi

Spouse Date of Birth

18 Nov 1999

User Details

1. Enter/select the user details such as User Name, First Name, Middle Name, Last name, Date of Birth, Gender.
2. Enter/select Family details such as Father Name, Mother Name, Marital Status, Spouse Name, Spouse Date of Birth.
3. Enter/Select the Contact Details such as Email ID, Contact No.

User Request > Details

Admin

My Task

Organization

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Name

Request Ref No

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santhakumar.itgalax@gmail.com

7658795365

User Details

Employment Details

Enter Employee Code

User Details

User Name *

santha.kumar

First Name *

Customer

Middle Name

Service

Last Name *

Officer 2

Gender *

Male

Date Of Birth *

14 Dec 1996

Contact Details

Email ID *

santhakumar.itgalax@gmail.com

Contact No *

7658795365

Family Details

Father Name

Gopal

Mother Name

Gowari

Marital Status

Married

Spouse Name

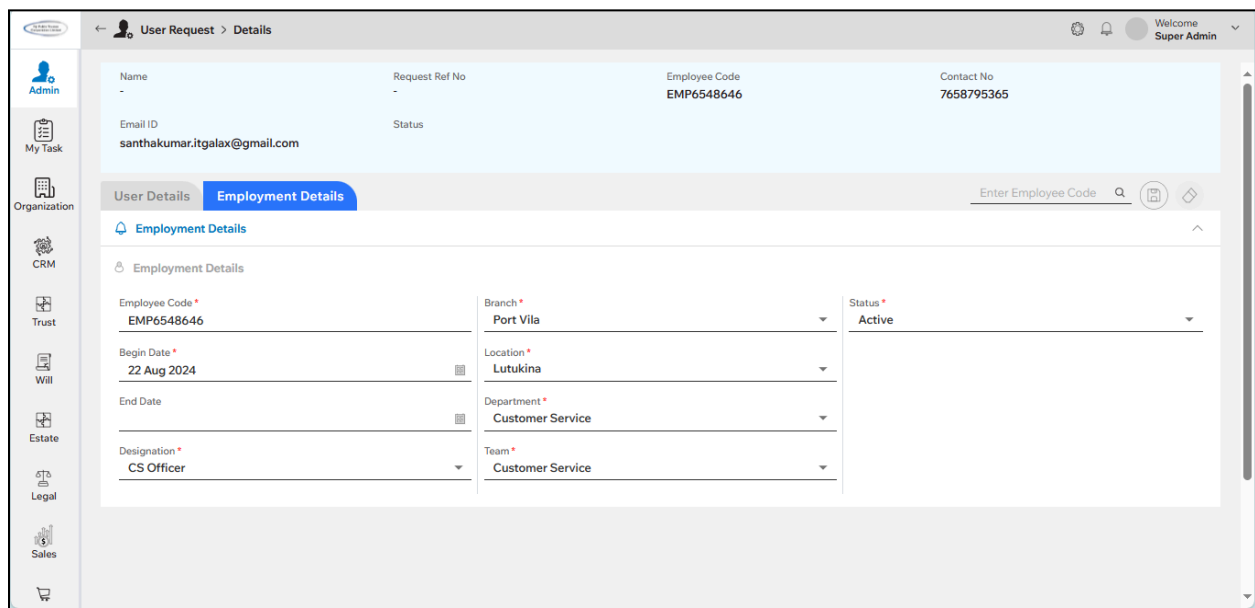
Swathi

Spouse Date of Birth

18 Nov 1999

Employment Details:

4. Click on **Employment Details Tab**, the fields to be filled for Employment Details will be displayed.
5. Enter/Select the Employment Details such as Employee Code, Begin Date, End Date, Designation, Branch, Location, Department, Team and Status. Begin date will be displayed as the current date by default. If required can change the Begin date.
6. Values in the following field Branch, Location, Department, Team will be displayed by default. If required can change these values.



← User Request > Details

Welcome Super Admin

Admin

My Task

Organization

CRM

Trust

Will

Estate

Legal

Sales

Name -

Request Ref No -

Employee Code EMP6548646

Contact No 7658795365

Email ID santhakumar.itgalax@gmail.com

Status

User Details Employment Details

Enter Employee Code

Employment Details

Employee Code * EMP6548646

Branch * Port Vila

Status * Active

Begin Date * 22 Aug 2024

Location * Lutukina

End Date

Department * Customer Service

Designation * CS Officer

Team * Customer Service

7. Click the **Save** button to save the User Request detail. The Status will displayed as 'Pending Submission' and Request Ref No will be autogenerated generated.



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User Request > Details

Admin | My Task | Organization | CRM | Trust | Will | Estate | Legal | Sales

Summary:

Name	Customer Service Officer 2	Request Ref No	2208240002	Employee Code	EMP6548646	Contact No	7658795365
Email ID	santhakumard.itgalax@gmail.com						
Status	Pending Submission						

User Details

User Details	Contact Details	Family Details
User Name santha.kumar	Email ID santhakumard.itgalax@gmail.com	Father Name Gopal
First Name Customer	Contact No 7658795365	Mother Name Gowari
Middle Name Service		Marital Status MARED
Last Name Officer 2		Spouse Name Swathi
Gender Male		Spouse Date of Birth 18 Nov 1999
Date Of Birth 14 Dec 1996		

8. Click the **Clear** button to clear all entered values.
9. A summary of user request details such as Name, Request Ref No, Employee Code, Contact No, Email ID and Status are displayed on the top.

User Request > Details

Admin | My Task | Organization | CRM | Trust | Will | Estate | Legal | Sales

Summary:

Name	Customer Service Officer 2	Request Ref No	2208240002	Employee Code	EMP6548646	Contact No	7658795365
Email ID	santhakumard.itgalax@gmail.com						
Status	Pending Submission						

User Details

User Details	Contact Details	Family Details
User Name santha.kumar	Email ID santhakumard.itgalax@gmail.com	Father Name Gopal
First Name Customer	Contact No 7658795365	Mother Name Gowari
Middle Name Service		Marital Status MARED
Last Name Officer 2		Spouse Name Swathi
Gender Male		Spouse Date of Birth 18 Nov 1999
Date Of Birth 14 Dec 1996		

10. Branch, Team, Group, History tabs will be displayed after saving the User Request Details.
11. If required change/modify the User Details, Emp Details under the user request detail and click the **Edit** button to update the modification details.



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The screenshot shows the 'User Request > Details' page. At the top, there's a header with 'User Request > Details' and a 'Welcome Super Admin' message. Below the header, there's a summary section with fields: Name (Customer Service Officer 2), Request Ref No (2208240002), Employee Code (EMP6548646), and Contact No (7658795365). Below this, there's a section for 'User Details' with tabs: User Details, Employment Details, Branch, Team, Group, and History. The 'User Details' tab is active, showing fields for User Name (santha.kumar), First Name (Customer), Middle Name (Service), Last Name (Officer 2), Gender (Male), and Date Of Birth (14 Dec 1996). To the right, there's a 'Contact Details' section with Email ID (santhakumard.itgalax@gmail.com) and Contact No (7658795365). Further right, there's a 'Family Details' section with fields for Father Name (suresh), Mother Name (Gowari), Marital Status (MARED), Spouse Name (Swathi), and Spouse Date of Birth (18 Nov 1999). A green notification bar at the bottom right says 'Data updated successfully.'.

12. Click on the **Refresh** button to restore all the previous saved values.

Branch

1. Click on the Branch tab, all the branch names will be displayed.

The screenshot shows the 'User Request > Details' page with the 'Branch' tab selected. The 'Branch' tab is highlighted in blue. Below the tabs, there's a table with columns: Branch, Begin Date, End Date, and Status. The table contains two rows: 'Port Vila' and 'Port Suva'. Both rows have a 'Status' of 'Active' with a checkmark icon. The 'Begin Date' and 'End Date' fields are empty.

Branch	Begin Date	End Date	Status
Port Vila			✓ Active
Port Suva			✓ Active

2. Select Begin Date, End Date and Status for the Branch needed.

3. Click on Save button to save the Branch Details.

4. Saved Branches will be displayed at the top of the grid.



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Team

1. Click on Team Tab, all the Team names will be displayed.

Team	Begin Date	End Date	Status
Trust Officers			
Trust Creation			Active
Trust Withdrawal			Active
Trust Settlement			Active
Will Department			
Will Creation			Active
Estate Officers			
Estate			Active
Legal Officers			
Legal and Other Service			Active
Finance & Administration			

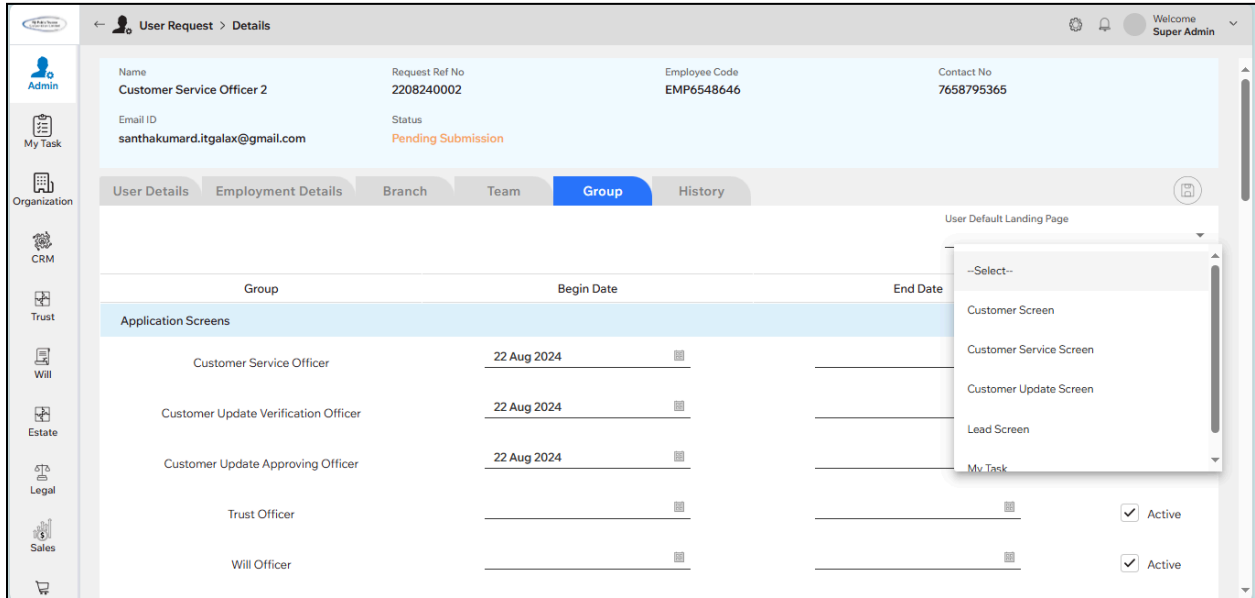
2. Select Begin Date, End Date and Status for the Team needed.
3. Click on Save button to save the Team.
4. Saved details will be displayed at the top of the grid.

Group

1. Click on the Group Tab, Application Screens and Admin Screens will get displayed under respective heading.

Group	Begin Date	End Date	Status
Application Screens			
Trust Officer			Active
Will Officer			Active
Estate Officer			Active
Legal Service Officer			Active
Other Service Officer			Active
Customer Service Officer			Active
Customer Update Verification Officer			Active
Customer Update Approving Officer			Active

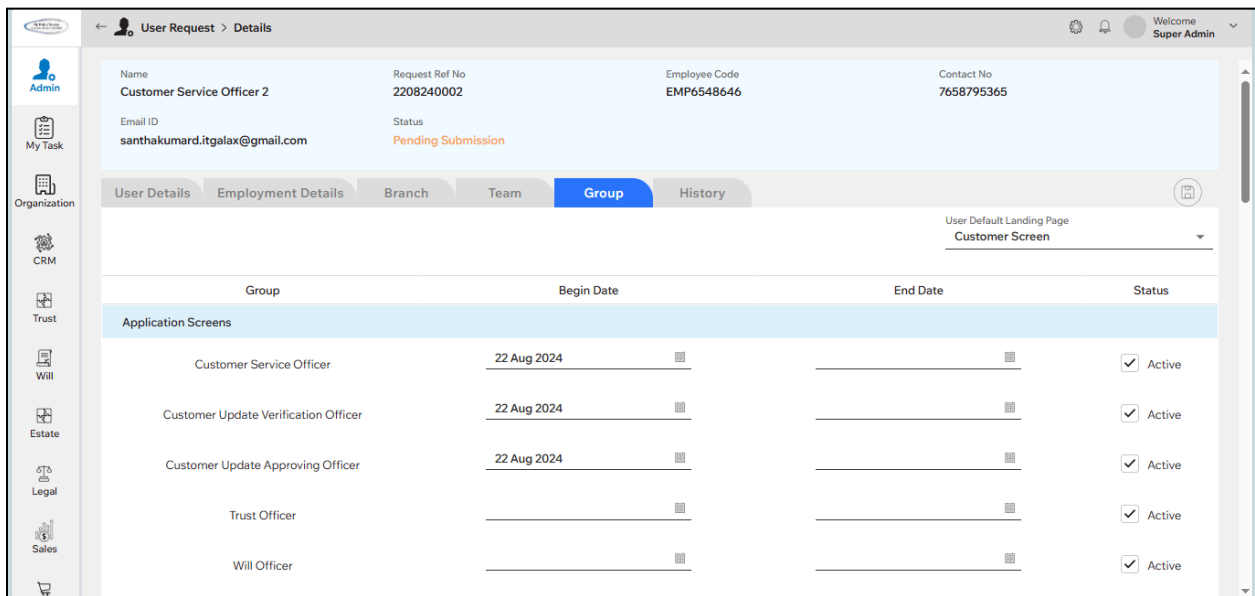
2. Select Begin Date, End Date and Status for the Groups needed.
3. Click on **Save** button.
4. Saved details will be displayed at the top.
5. After the group detail is saved, Added Group relevant screen names will display in the default landing page drop-down list.



The screenshot shows the 'User Request > Details' page. The 'Group' tab is selected. A dropdown menu for 'User Default Landing Page' is open, showing a list of application screens. The user's status is 'Pending Submission'.

Group	Begin Date	End Date	Status
Application Screens			
Customer Service Officer	22 Aug 2024		
Customer Update Verification Officer	22 Aug 2024		
Customer Update Approving Officer	22 Aug 2024		
Trust Officer			<input checked="" type="checkbox"/> Active
Will Officer			<input checked="" type="checkbox"/> Active

6. Select the Screen Name in the default landing page drop-down and click the **Save** button. Users can login only when the Default landing page is set.



The screenshot shows the 'User Request > Details' page with the 'Group' tab selected. The 'User Default Landing Page' dropdown is now set to 'Customer Screen'. The user's status is 'Pending Submission'.

Group	Begin Date	End Date	Status
Application Screens			
Customer Service Officer	22 Aug 2024		<input checked="" type="checkbox"/> Active
Customer Update Verification Officer	22 Aug 2024		<input checked="" type="checkbox"/> Active
Customer Update Approving Officer	22 Aug 2024		<input checked="" type="checkbox"/> Active
Trust Officer			<input checked="" type="checkbox"/> Active
Will Officer			<input checked="" type="checkbox"/> Active



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History :

Notes

1. To change the status,
 - a. In the Notes tab, Click the **Add** button, Enter Notes and select the Status as “Approved” and click the **Save** button.

The screenshot shows the 'User Request > Details' page. The top header includes a navigation bar with 'Admin', 'My Task', 'Organization', 'CRM', 'Trust', 'Will', 'Estate', 'Legal', and 'Sales'. The main content area displays user details for 'Customer Service Officer 2' with Request Ref No 2208240002, Employee Code EMP6548646, and Contact No 7658795365. The status is 'Pending Submission'. Below this, there are tabs for 'User Details', 'Employment Details', 'Branch', 'Team', 'Group', and 'History'. The 'History' tab is active, showing a 'Notes' section with 0 notes and an 'Assigned Officer' section with 1 officer. The 'Status History' and 'Communication History' sections are also visible.

The screenshot shows the 'User Request > Details' page with the 'Add Notes' modal open. The modal has a title bar 'User Request > Detail > Add Notes' and a close button. It contains a 'Status' dropdown menu set to 'Approved' and a 'Notes' text area with the text 'Approved'. The character count '8 / 250' is displayed next to the text area. The background shows the same user details as the previous screenshot, but the 'History' tab is not active.



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Assigned Officer

Assigned Officer History based on each status change will be maintained in this tab.

1. Officers can reassign to any other officer in the same group. To Reassign, select the Officer name and click the **Re Assign** button.
2. Officers can self-assign to themselves by clicking the **Self Assign** button.

The screenshot shows the 'User Request > Details' page. The top section displays user information: Name (Customer Service Officer 2), Request Ref No (2208240002), Employee Code (EMP6548646), Contact No (7658795365), Email ID (santhakumard.itgalax@gmail.com), and Status (Approved). Below this, there are tabs for User Details, Employment Details, Branch, Team, Group, and History (selected). The History tab shows a 'Notes' section with one note and an 'Assigned Officer' section with one officer. The 'Status History' and 'Communication History' sections are also visible, showing a timeline of status changes: 'Approved' by Super Admin on 22 Aug 2024 at 04:24 PM, and 'Pending Submission' by Super Admin on 22 Aug 2024 at 03:38 PM.

Status History

Status History for each status change in Notes will be displayed in this tab.

The screenshot shows the 'User Request > Details' page with the 'Status History' tab selected. The top section displays user information: Name (Customer Service Officer 2), Request Ref No (2208240002), Employee Code (EMP6548646), Contact No (7658795365), Email ID (santhakumard.itgalax@gmail.com), and Status (Approved). Below this, there are tabs for User Details, Employment Details, Branch, Team, Group, and History (selected). The History tab shows a 'Notes' section with one note and an 'Assigned Officer' section with one officer. The 'Status History' and 'Communication History' sections are also visible, showing a timeline of status changes: 'Approved' by Super Admin on 22 Aug 2024 at 04:24 PM, and 'Pending Submission' by Super Admin on 22 Aug 2024 at 03:38 PM.



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Communication History:

1. In this tab, the email log will be displayed with the recipient, date & time, status, and action.

The screenshot displays the 'User Request > Details' page. The top section shows user information: Name (Customer Service Officer 2), Request Ref No (2208240002), Employee Code (EMP6548646), and Contact No (7658795365). Below this, the 'Email ID' is santhakumard.itgalax@gmail.com and the 'Status' is Approved. The 'History' tab is selected, showing a table with columns: To, Date | Time, Status, and Action. The table is currently empty, with a message 'Showing: 0 - 0 of 0 Entries | 25 | < >'. The left sidebar contains navigation icons for Admin, My Task, Organization, CRM, Trust, Will, Estate, Legal, and Sales.

Note: Click the **Back** button to go back to the previous screen.

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