



Fiji Public Trustee Corporation Limited Will Module- User Manual



Will Application Detail

User Roles: Estate Officer, Manager, Register Officer, Accounts Officer

Overview:

This screen allows user to view, create, and process Will Applications. The system will display the Will Application's parent details in the header.

The screenshot displays the 'Will Application > Details' page. The header section contains the following information:

Will Ref No	Lead Ref No	Applied Date	Application Stage
WILL24092500001	LEAD24092500001	25 Sep 2024	Provide Requirement List

Below the header, there are two tabs: 'Application' (selected) and 'History'. Under the 'Application' tab, there are three sub-tabs: 'Applicant Details', 'Spouse Details', and 'Children Details'. The 'Applicant Details' sub-tab is active, showing a form with the following sections:

- General Information:** Name, Date Of Birth, Gender, Marital Status, Occupation.
- Communication:** Home Contact, Office Contact, Email.
- Address:** (Empty field)

Below the Applicant Details section, there is a section for 'Testator / Testatrix Details' with the same form structure: General Information, Communication, and Address.

Application Tab:

This section contains essential information, such as General Information , Communication , Address who initiated the application.



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Will Application > Details

Will Ref No: WILL24092500001
Lead Ref No: LEAD24092500001
Applied Date: 25 Sep 2024
Application Stage: Provide Requirement List
Application Status: Providing Requirement List
Action Status: Approved

Application | Process | History

Applicant Details | Spouse Details | Children Details

General Information

Name	-
Date Of Birth	-
Gender	-
Marital Status	-
Occupation	-

Communication

Home Contact	-
Office Contact	-
Email	-

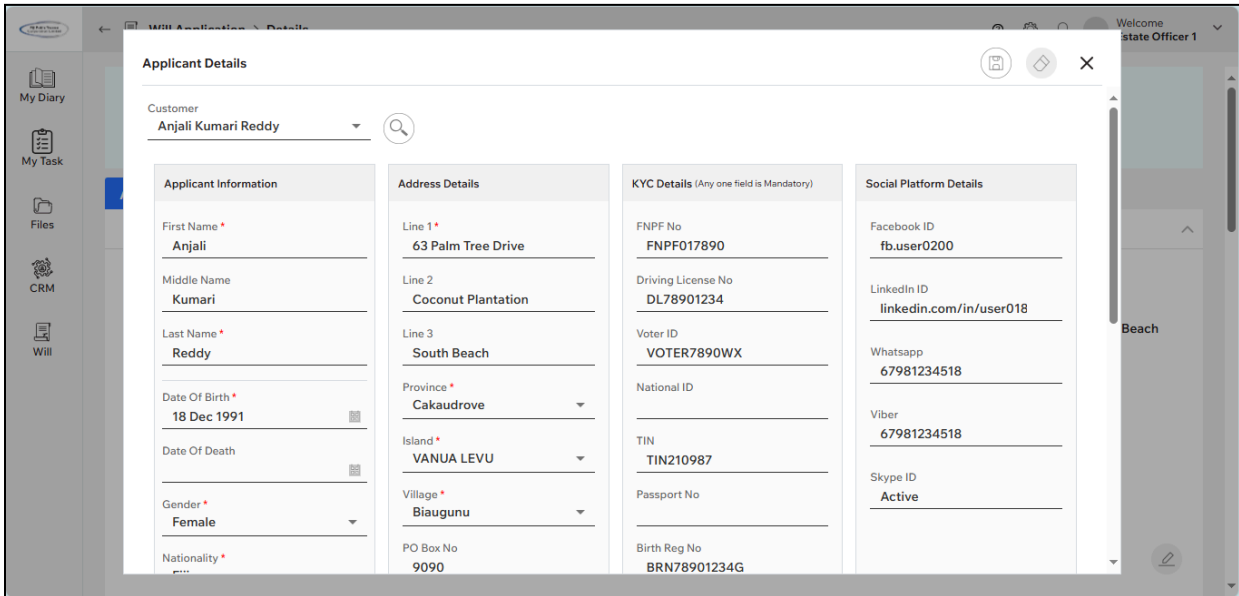
Address

-

Applicant Details Section :

Adding a Applicant Details:

1. Click the **Edit** button to enter “**Applicant Details**”.
2. An **Applicant Details** popup will appear.
3. Choose the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new Applicant details such as Application Information, Address Details, KYC Details and Social Information.

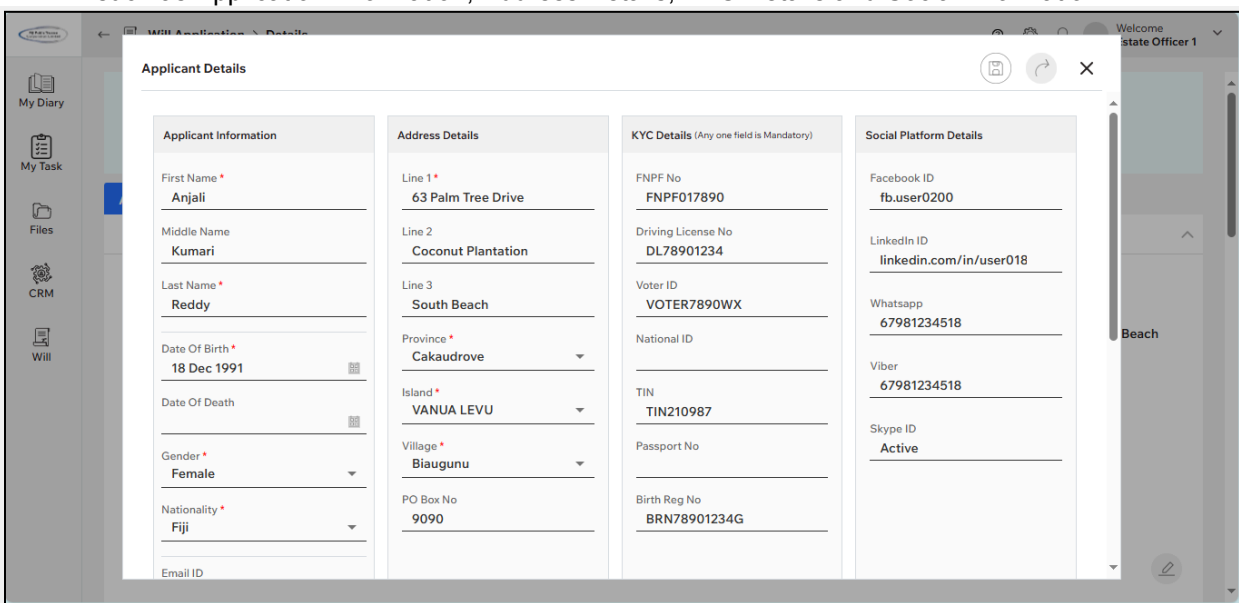


Applicant Information	Address Details	KYC Details (Any one field is Mandatory)	Social Platform Details
First Name * Anjali	Line 1 * 63 Palm Tree Drive	FNPF No FNPF017890	Facebook ID fb.user0200
Middle Name Kumari	Line 2 Coconut Plantation	Driving License No DL78901234	LinkedIn ID linkedin.com/in/user018
Last Name * Reddy	Line 3 South Beach	Voter ID VOTER7890WX	Whatsapp 67981234518
Date Of Birth * 18 Dec 1991	Province * Cakaudrove	National ID	Viber 67981234518
Date Of Death	Island * VANUA LEVU	TIN TIN210987	Skype ID Active
Gender * Female	Village * Biaugunu	Passport No	
Nationality * Fiji	PO Box No 9090	Birth Reg No BRN78901234G	

- Click the **Save** button to save the **Applicant details**.
- Click the **Clear** button to erase the entered or selected details.
- Click the **Close** button to exit the popup window.

Editing Applicant Details:

- Click On **Edit** button to open **Edit Applicant Details** Popup.
- Change the Customer by Choosing the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new Applicant details such as Application Information, Address Details, KYC Details and Social Information.



Applicant Information	Address Details	KYC Details (Any one field is Mandatory)	Social Platform Details
First Name * Anjali	Line 1 * 63 Palm Tree Drive	FNPF No FNPF017890	Facebook ID fb.user0200
Middle Name Kumari	Line 2 Coconut Plantation	Driving License No DL78901234	LinkedIn ID linkedin.com/in/user018
Last Name * Reddy	Line 3 South Beach	Voter ID VOTER7890WX	Whatsapp 67981234518
Date Of Birth * 18 Dec 1991	Province * Cakaudrove	National ID	Viber 67981234518
Date Of Death	Island * VANUA LEVU	TIN TIN210987	Skype ID Active
Gender * Female	Village * Biaugunu	Passport No	
Nationality * Fiji	PO Box No 9090	Birth Reg No BRN78901234G	
Email ID			



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9. Click the **Update** button to save the changes.
10. Click the **Refresh** button to refresh all the entered previous values.
11. Click the **Close** button to exit the popup window.

Spouse Details Section :

Select the Spouse Tab to proceed to the Spouse Details Tab.

The screenshot displays the 'Will Application > Details' page. The top section shows application metadata: Will Ref No (WILL24092500001), Lead Ref No (LEAD24092500001), Applied Date (25 Sep 2024), and Application Stage (Provide Requirement List). Below this, the 'Application' tab is selected, showing 'Applicant Details', 'Spouse Details', and 'Children Details'. The 'Spouse Details' section contains a table with one entry for 'Divine Love Priscilla'. Below the table is a section for 'Testator / Testatrix Details' with tabs for 'General Information', 'Communication', and 'Address'.

Spouse Name	DOB	Contact	Email	Gender	Action
Divine Love Priscilla	19 Jul 2001	4545863568	priscilla@gmail.com	Female	

Adding a Spouse Details:

1. Click the **Add** button to enter Spouse details.
2. A **Spouse Details** popup will appear.
3. Choose the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new Spouse details.



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4. Click the **Save** button to save the **Spouse details**.
5. Click the **Clear** button to erase the entered or selected details.
6. Click the **Close** button to exit the popup window.

Editing Spouse Details:

1. Click on the “Open” button and navigate to the “**Edit Spouse Details**” pop-up screen.
2. Click on the “Edit” button to edit the **Spouse Details**.
3. Change the Customer by Choosing the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new Applicant details such as Application Information, Address Details, KYC Details and Social Information.



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The screenshot shows a 'Spouse Details' form with four main sections: Spouse Information, Address Details, KYC Details, and Social Platform Details. The form is filled with data for a spouse named Divine Love Priscilla.

Spouse Information	Address Details	KYC Details (Any one field is Mandatory)	Social Platform Details
First Name * Divine	Line 1 * 2695 Eliporvilai	FNPF No * 34466656436	Facebook ID Priscilla
Middle Name Love	Line 2 Eathavilai	Driving License No	LinkedIn ID Divine Love Priscilla
Last Name * Priscilla	Line 3 Mekmandapam PO	Voter ID	Whatsapp 86545465658
Date Of Birth * 19 Jul 2001	Province * Bua	National ID	Viber 7678999999
Date Of Death	Island * TAVEA	TIN	Skype ID Divine Love Priscilla
Gender * Female	Village * Tavea	Passport No	
Nationality * Fiji	PO Box No 620166	Birth Reg No	
Email ID			

4. Click the **Update** button to save the changes.
5. Click the **Refresh** button to refresh all the entered previous values.
6. Click the **Close** button to exit the popup window.

Children Details Section :

select the Children Details to proceed to the Children Details Tab.

The screenshot shows the 'Children Details' section of the 'Will Application > Details' page. It includes a summary of the application and a table of children details.

Application Summary:

Will Ref No	Lead Ref No	Applied Date	Application Stage
WILL24092500001	LEAD24092500001	25 Sep 2024	Provide Requirement List

Application Status: Providing Requirement List
Action Status: Approved

Children Details Table:

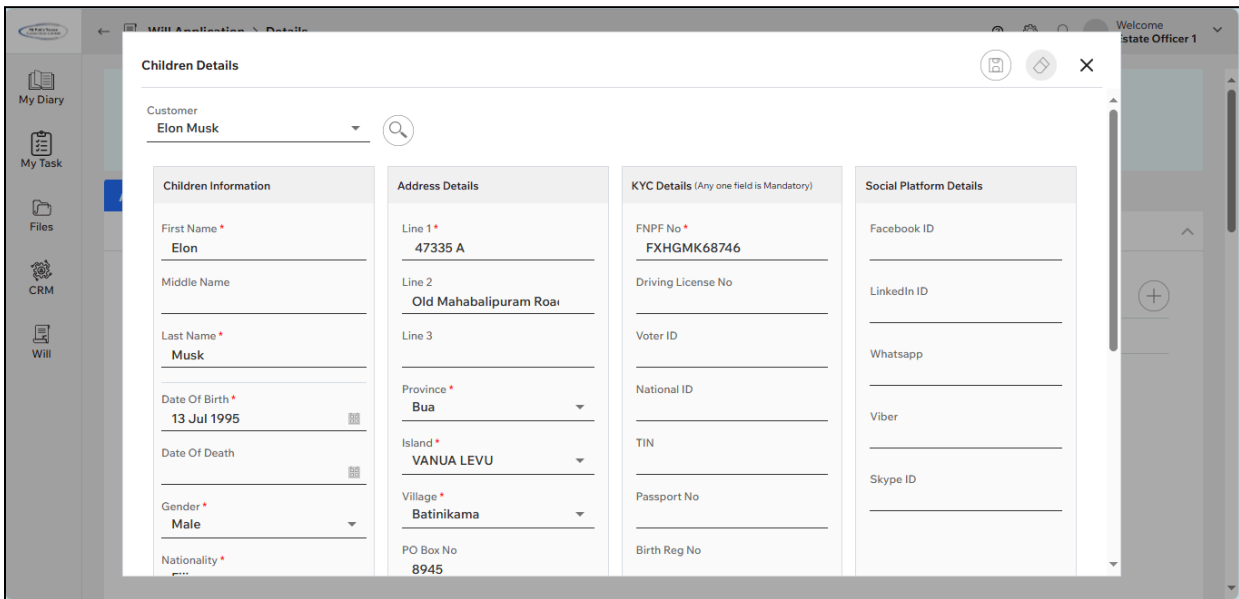
Children Name	DOB	Contact	Email	Gender	Action
Elon Musk	13 Jul 1995	7984669866	musk@gmail.com	Male	[Edit]

Testator / Testatrix Details:

General Information	Communication	Address
Name	Home Contact	
Date Of Birth		

Adding a Children Details:

1. Click the **Add** button to enter Children details.
2. A **Children Details** popup will appear.
3. Choose the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new Children details.



4. Click the **Save** button to save the **Children details**.
5. Click the **Clear** button to erase the entered or selected details.
6. Click the **Close** button to exit the popup window.

Editing Children Details:

1. Click on the "Open" button and navigate to the "**Edit Children Details**" pop-up screen.
2. Click on the "Edit" button to edit the **Children Details**.
3. Change the Customer by Choosing the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new Applicant details such as Application Information, Address Details, KYC Details and Social Information.



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4. Click the **Update** button to save the changes.
5. Click the **Refresh** button to refresh all the entered previous values.
6. Click the **Close** button to exit the popup window.

Testator / Testatrix Section :

Select the **Testator Details** to proceed to the **Testator Details** Tab.

This section contains essential information, such as General Information , Communication , Address who initiated the application.



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Will Application > Details

Will Ref No: WILL24092500001 | Lead Ref No: LEAD24092500001 | Applied Date: 25 Sep 2024 | Application Stage: Provide Requirement List

Application Status: Providing Requirement List | Action Status: Approved

Application | Process | History

Applicant Details | Spouse Details | Children Details

Testator / Testatrix Details

General Information | Communication | Address

Name: | Home Contact: |
Date Of Birth: | Office Contact: |
Gender: | Email: |
Marital Status: |
Occupation: |

Adding a Testator Details:

1. Click the **Edit** button to enter “**Testator Details**”.
2. A **Testator Details** popup will appear.
3. Choose the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new **Testator Details**.

Testator Details

Customer: Arjun Kumar Singh

Testator Information

First Name: Arjun
Middle Name: Kumar
Last Name: Singh
Date Of Birth: 21 Aug 1991
Date Of Death: 21 Nov 1991
Gender: Male
Nationality: |
Occupation: CEO

Address Details

Line 1: 23 Garden Grovess
Line 2: Orchard Hill
Line 3: East Field
Province: Malampa
Island: Pele
Village: Natadola
PO Box No: 4040

KYC Details (Any one field is Mandatory)

FNPF No: FNP0056788
Driving License No: DL56789014
Voter ID: VOTER5678MN
National ID: NID445566
TIN: TIN543210
Passport No: P5678901E
Birth Reg No: BRN56789012

Social Platform Details

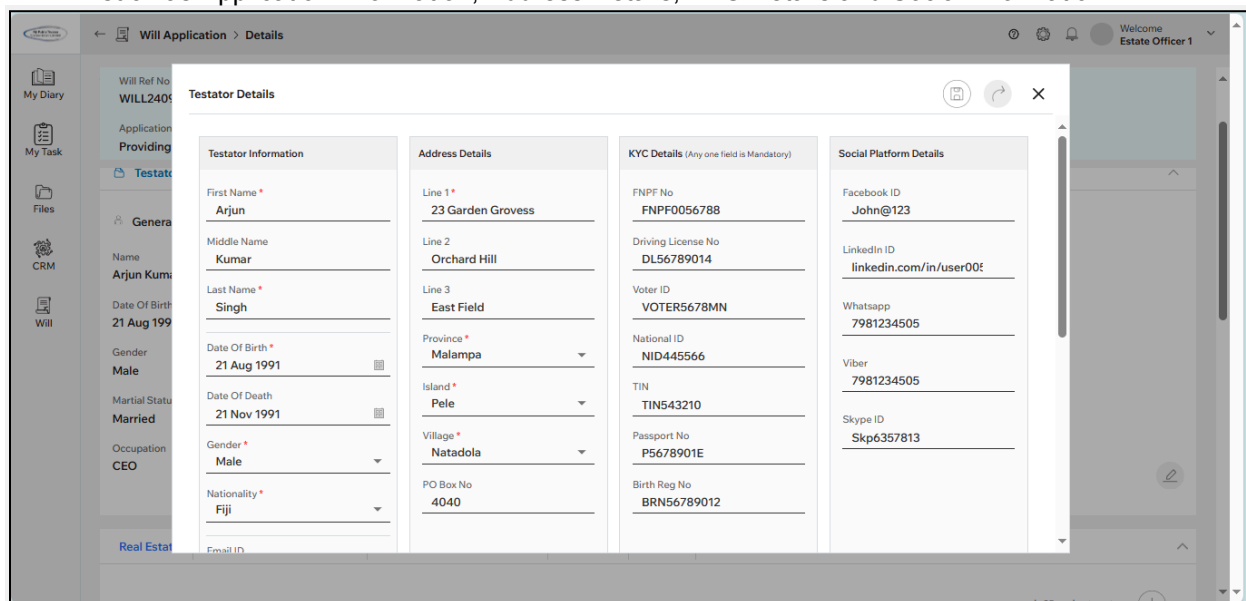
Facebook ID: John@123
LinkedIn ID: linkedin.com/in/user00t
Whatsapp: 7981234505
Viber: 7981234505
Skype ID: Skp6357813

4. Click the **Save** button to save the **Testator Details**.
5. Click the **Clear** button to erase the entered or selected details.

6. Click the **Close** button to exit the popup window.

Editing Testator Details:

7. Click on the **"Edit"** button to edit the **Testator Details** and navigate to the **"Edit Testator Details"** pop-up screen.
8. Click on the **"Edit"** button in **Edit Testator Details pop-up** screen.
9. Change the Customer by Choosing the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new Applicant details such as Application Information, Address Details, KYC Details and Social Information.



10. Click the **Update** button to save the changes.
11. Click the **Refresh** button to refresh all the entered previous values.
12. Click the **Close** button to exit the popup window.

Real Estate Section :



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Select the **Real Estate** to proceed to the **Real Estate** Tab.

Will Application > Details

Will Ref No: WILL24092500001 | Lead Ref No: LEAD24092500001 | Applied Date: 25 Sep 2024 | Application Stage: Provide Requirement List | Action Status: Approved

Application | Process | History

Applicant Details | Spouse Details | Children Details

Testator / Testatrix Details

Real Estate | Bank / Financial Institution | Share / Stock / Investments | Insurance | Vehicle

Showing: 0 - 0 of 0 Entries | 25 | < | > | +

Title No	Tenure	Tenancy	Type	Action
No records found Try adjusting your search or filter options				

Adding a Real Estate :

1. Click the **Add** button to enter **Real Estate**.
2. A **Real Estate** popup will appear.
3. This section contains essential information, such as General Information , Address & Additional Information.
4. Enter / Select Title , Tenancy , Tenancy Type , Tenure , Landlord Name Under **General Information**.
5. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address**.
6. Click on the **Browse** button and select the desired file from your local system under **Additional Information**.
7. The selected document will appear below the browse field.
8. Click the **Upload** icon to add the document to the document grid.



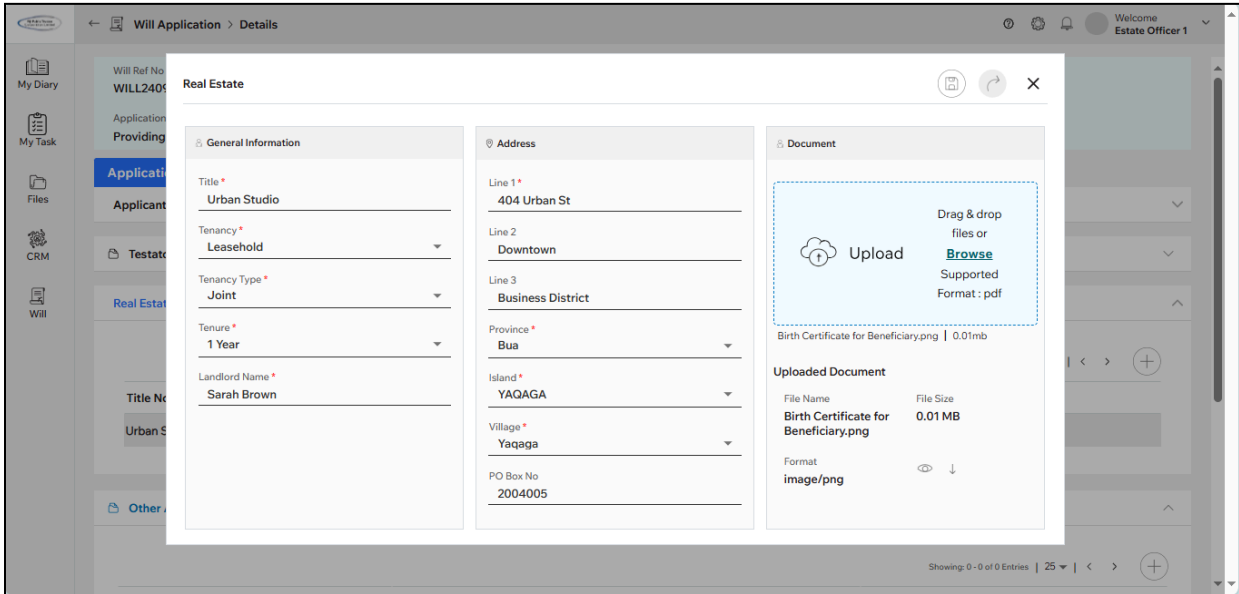
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9. Click the **Save** button to save **Real Estate**.
10. Click the **Clear** button to remove the entered or selected details.
11. Click the **Close** button to close the popup window.


Editing Real Estate:

7. Click on the "Open" button and navigate to the "**Edit Real Estate**" pop-up screen.
8. Enter / Select Title , Tenancy , Tenancy Type , Tenure , Landlord Name Under **General Information**. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address**.
9. Click on the **Browse** button and select the desired file from your local system under **Additional Information**.
10. The selected document will appear below the browse field.
11. Click the **Upload** icon to add the document to the document grid.
12. In the **Action** column, the following options will be available for each document: **Download**: To download the document. **View**: To view the document. **Delete**: To delete the document.



General Information	
Title *	Urban Studio
Tenancy *	Leasehold
Tenancy Type *	Joint
Tenure *	1 Year
Landlord Name *	Sarah Brown

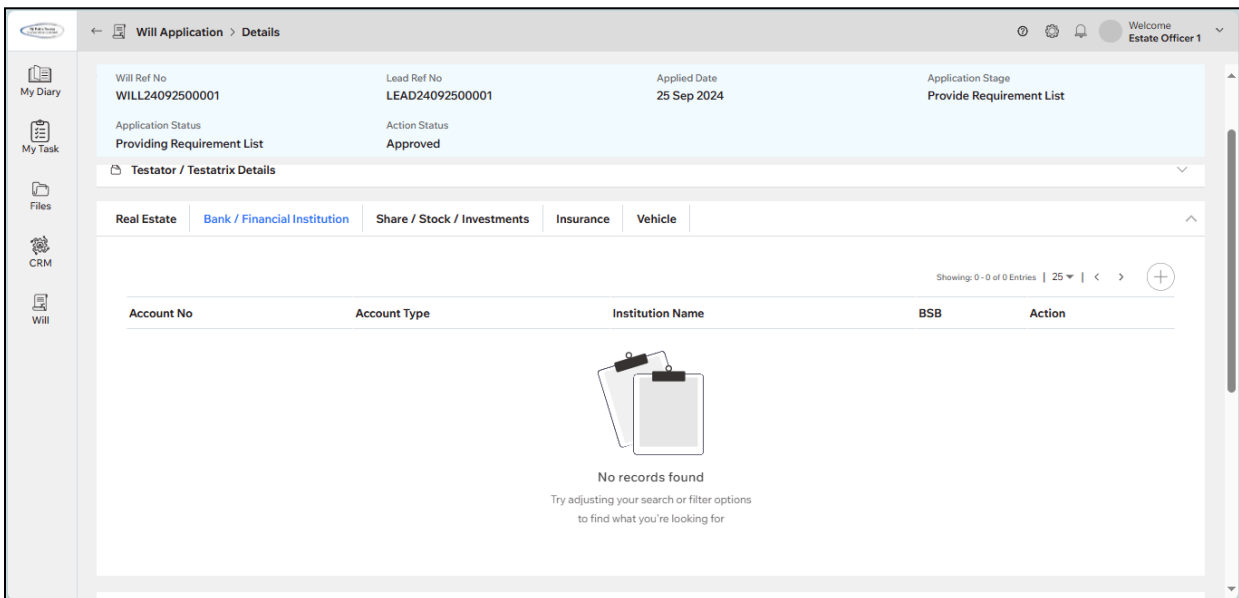
Address	
Line 1 *	404 Urban St
Line 2	Downtown
Line 3	Business District
Province *	Bua
Island *	YAQAGA
Village *	Yaqaga
PO Box No	2004005


Document	
<div>  Upload <div> Drag & drop files or Browse Supported Format : pdf </div> </div>	
Birth Certificate for Beneficiary.png 0.01mb	
Uploaded Document	
File Name	File Size
Birth Certificate for Beneficiary.png	0.01 MB
Format	image/png

13. Click the **Update** button to save the changes.
14. Click the **Refresh** button to refresh all the entered previous values.
15. Click the **Close** button to exit the popup window.

Bank / Financial Institution Section :

To proceed to the **Bank / Financial Institution** Tab, select the **Bank / Financial Institution**.



Account No	Account Type	Institution Name	BSB	Action
<div>  <p>No records found</p> <p>Try adjusting your search or filter options to find what you're looking for</p> </div>				



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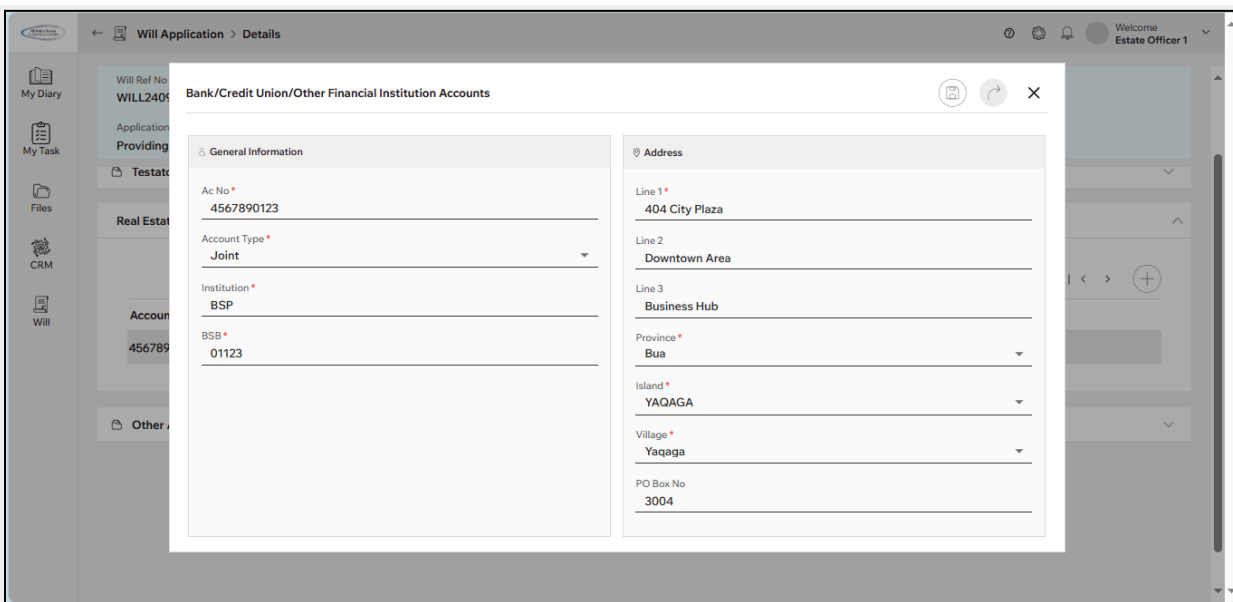
Adding a Bank / Financial Institution :

1. Click the **Add** button to enter a **Bank / Financial Institution**.
2. A **Bank/Credit Union/Other Financial Institution Accounts** popup will appear.
3. This section contains essential information, such as General Information , Address & Additional Information.
4. Enter / Select Institution , Ac No , BSB , Account Type Under **General Information**.
5. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address**.

6. Click the **Save** button to save **Bank / Financial Institution**.
7. Click the **Clear** button to remove the entered or selected details.
8. Click the **Close** button to close the popup window.

Editing Bank / Financial Institution:

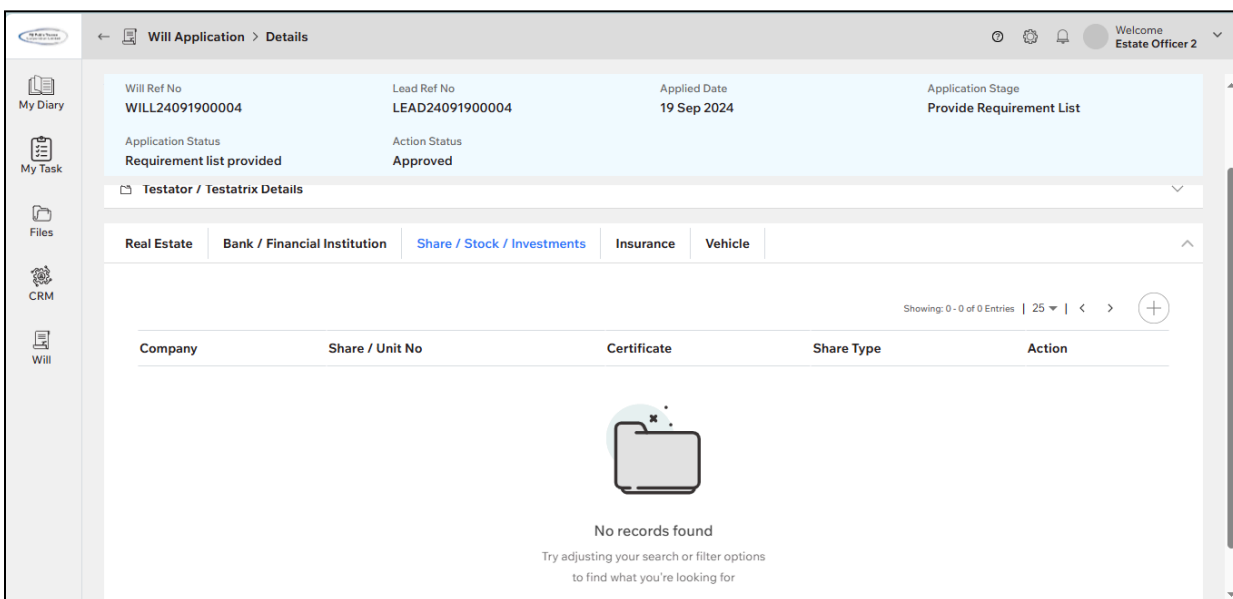
16. Click on the “Open” button and navigate to the “**Edit Bank/Credit Union/Other Financial Institution Accounts**” pop-up screen.
17. Enter / Select Institution , Ac No , BSB , Account Type Under **General Information**.
18. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address**.



19. Click the **Update** button to save the changes.
20. Click the **Refresh** button to refresh all the entered previous values.
21. Click the **Close** button to exit the popup window.

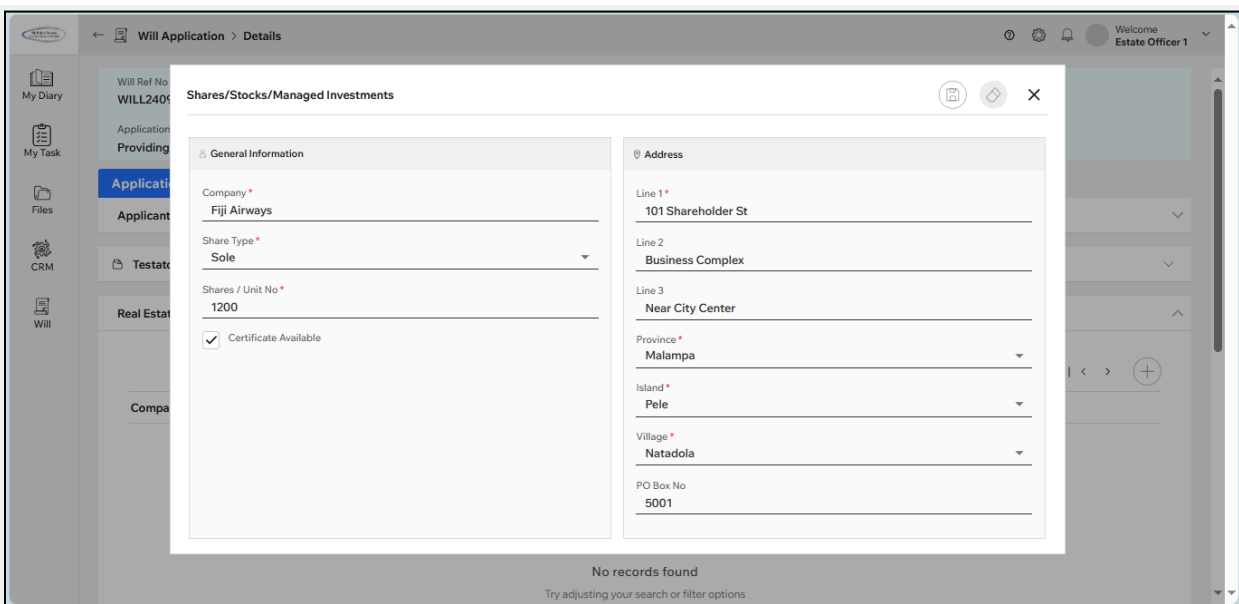
Share / Stock / Investments Section :

To proceed to the **Share / Stock / Investments** Tab, select the **Share / Stock / Investments**.



Adding a Share / Stock / Investments :

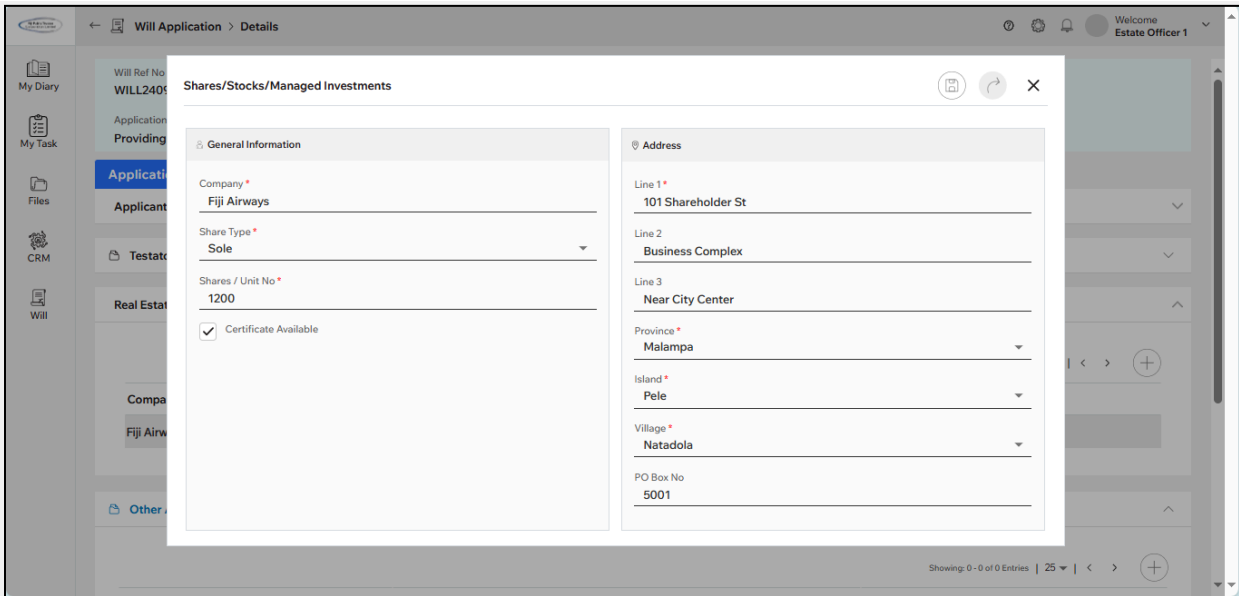
1. Click the **Add** button to enter **Share / Stock / Investments**.
2. A **Shares/Stocks/Managed Investments** popup will appear.
3. This section contains essential information, such as General Information , Address & Additional Information.
4. Enter / Select Company, Shares / Unit No, Certificate Available , Share Type Under **General Information**.
5. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address**.



6. Click the **Save** button to save **Shares/Stocks/Managed Investments**.
7. Click the **Clear** button to remove the entered or selected details.
8. Click the **Close** button to close the popup window.

Editing a Share / Stock / Investments :

9. Click on the "Open" button and navigate to the "**Edit Shares/Stocks/Managed Investments**" pop-up screen.
10. Click on the "Edit" button to edit the **Shares/Stocks/Managed Investments**.
11. Enter / Select Company, Shares / Unit No, Certificate Available , Share Type Under **General Information**.
12. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address**.



Shares/Stocks/Managed Investments

General Information

Company *
Fiji Airways

Share Type *
Sole

Shares / Unit No *
1200

☒ Certificate Available

Address

Line 1 *
101 Shareholder St

Line 2
Business Complex

Line 3
Near City Center

Province *
Malampa

Island *
Pele

Village *
Natadola

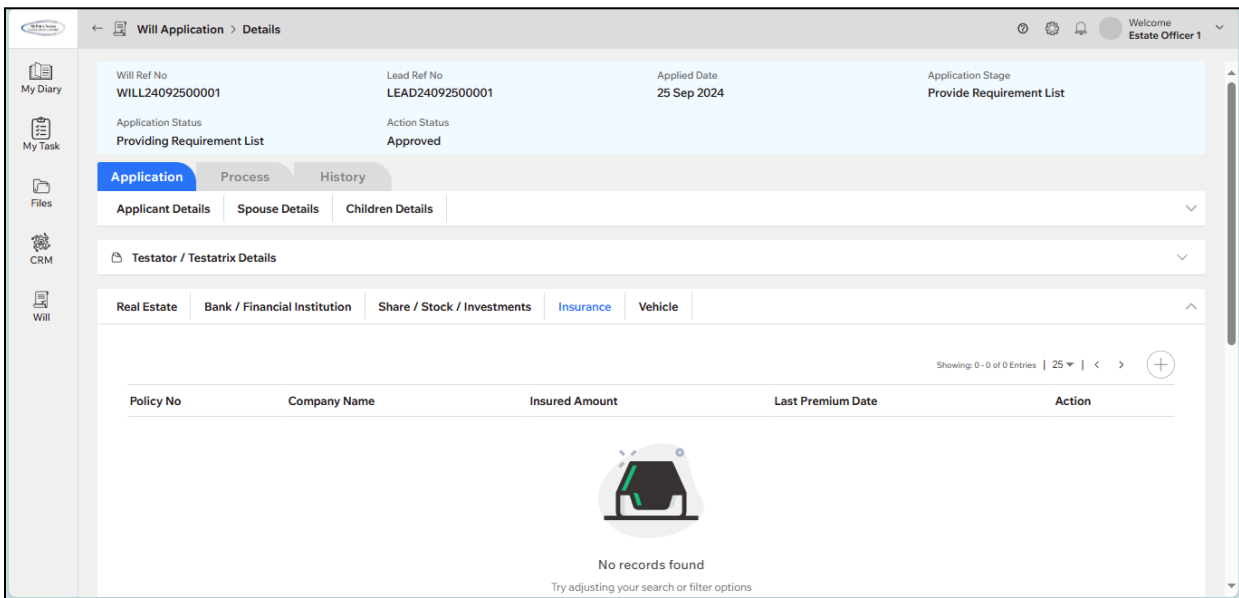
PO Box No
5001

Showing: 0 - 0 of 0 Entries | 25 | < > +

13. Click the **Update** button to save the changes.
14. Click the **Refresh** button to refresh all the entered previous values.
15. Click the **Close** button to exit the popup window.

Insurance Section :

To proceed to the **Insurance** Tab, select the **Insurance**.



Will Application > Details

Will Ref No: WILL24092500001 | Lead Ref No: LEAD24092500001 | Applied Date: 25 Sep 2024 | Application Stage: Provide Requirement List

Application Status: Providing Requirement List | Action Status: Approved


Application | Process | History

Applicant Details | Spouse Details | Children Details

Testator / Testatrix Details

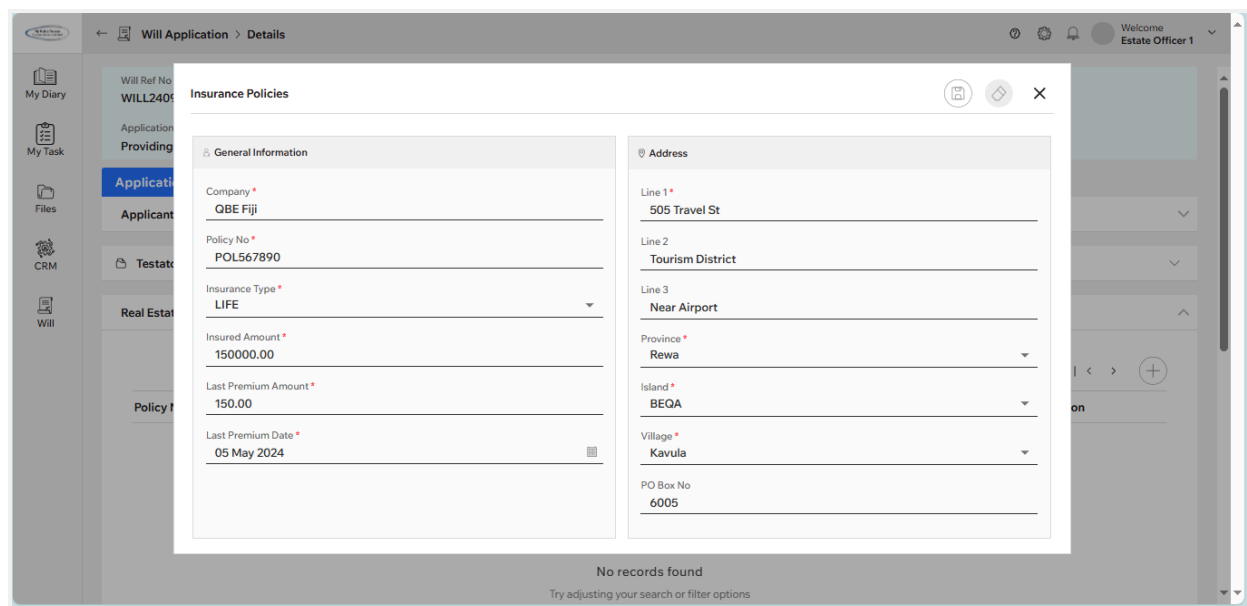
Real Estate | Bank / Financial Institution | Share / Stock / Investments | **Insurance** | Vehicle

Showing: 0 - 0 of 0 Entries | 25 | < > +

Policy No	Company Name	Insured Amount	Last Premium Date	Action
 <p>No records found</p> <p>Try adjusting your search or filter options</p>				

Adding a Insurance Policies :

1. Click the **Add** button to enter **Insurance Policies**.
2. An **Insurance Policies** popup will appear.
3. This section contains essential information, such as General Information , Address & Additional Information.
4. Enter / Select Company, Policy No , Insurance Type , Insured Amount , Last Premium Paid , Last Premium Date, lastPremiumPaidDate Under **General Information**.
5. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address**.



6. Click the **Save** button to save **Insurance Policies**.
7. Click the **Clear** button to remove the entered or selected details.
8. Click the **Close** button to close the popup window.

Editing a Insurance Policies :

16. Click on the “Open” button and navigate to the “**Edit Insurance Policies**” pop-up screen.
17. Click on the “Edit” button to edit the **Insurance Policies**.
18. Enter / Select Company, Policy No , Insurance Type , Insured Amount , Last Premium Paid , Last Premium Date, lastPremiumPaidDate Under **General Information**.
19. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address**.



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Insurance Policies

General Information

Company *
QBE Fiji

Policy No *
POL567890

Insurance Type *
LIFE

Insured Amount *
150000.00

Last Premium Amount *
150.00

Last Premium Date *
05 May 2024

Address

Line 1 *
505 Travel St

Line 2
Tourism District

Line 3
Near Airport

Province *
Rewa

Island *
BEQA

Village *
Kavula

PO Box No
6005

Showing: 0 - 0 of 0 Entries | 25 | < > +

20. Click the **Update** button to save the changes.
21. Click the **Refresh** button to refresh all the entered previous values.
22. Click the **Close** button to exit the popup window.

Vehicle Section :

To proceed to the **Vehicle** Tab, select the **Vehicle**.

Will Application > Details

Will Ref No: WILL24092500001 | Lead Ref No: LEAD24092500001 | Applied Date: 25 Sep 2024 | Application Stage: Provide Requirement List

Application Status: Providing Requirement List | Action Status: Approved


Application | Process | History

Applicant Details | Spouse Details | Children Details

Testator / Testatrix Details

Real Estate | Bank / Financial Institution | Share / Stock / Investments | Insurance | **Vehicle**

Showing: 0 - 0 of 0 Entries | 25 | < > +

Reg No	Vehicle Type	Make	Model	Action
 <p>No records found Try adjusting your search or filter options</p>				



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Adding a Vehicle :

1. Click the **Add** button to enter **Vehicle**.
2. A **Vehicle** popup will appear.
3. This section contains essential information, such as General Information , Address & Additional Information.
4. Enter / Select Reg No , Vehicle Type , Make , Model Under **General Information**.

The screenshot shows a web application interface for 'Will Application > Details'. A 'Vehicle' popup window is open, displaying a form with the following fields:

- Reg No ***: MNO7890
- Vehicle Type ***: Taxi (selected from a dropdown)
- Make**: Harley-Davidson
- Model**: Sportster

At the bottom of the popup, it states 'No records found' and 'Try adjusting your search or filter options'. The background interface includes a sidebar with icons for 'My Diary', 'My Task', 'Files', 'CRM', and 'Will', and a header area with 'Welcome Estate Officer 1'.

5. Click the **Save** button to save **Vehicle**.
6. Click the **Clear** button to remove the entered or selected details.
7. Click the **Close** button to close the popup window.

Editing a Vehicle :

8. Click on the **Open** button and navigate to the **Edit Vehicle** pop-up screen.
9. Click on the **Edit** button to edit the **Vehicle**.
10. Enter / Select Reg No , Vehicle Type , Make , Model Under **General Information**.



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The screenshot shows the 'Will Application > Details' page. A 'Vehicle' popup form is open, displaying the following information:

General Information	
Reg No *	MNO7890
Vehicle Type *	Taxi
Make	Harley-Davidson
Model	Sportster

The background application details are partially visible, showing 'Will Ref No: WILL24092500001' and 'Lead Ref No: LEAD24092500001'.

11. Click the **Update** button to save the changes.
12. Click the **Refresh** button to refresh all the entered previous values.
13. Click the **Close** button to exit the popup window.

Other Assets Section :

To proceed to the **Vehicle** Tab, select the **Vehicle**.

The screenshot shows the 'Will Application > Details' page with the 'Other Assets' section expanded. The page displays application details and a list of assets.

Will Ref No	Lead Ref No	Applied Date	Application Stage
WILL24092500001	LEAD24092500001	25 Sep 2024	Provide Requirement List

Application Status	Action Status
Providing Requirement List	Approved

Application Details | Spouse Details | Children Details

Testator / Testatrix Details

Real Estate | Bank / Financial Institution | Share / Stock / Investments | Insurance | Vehicle

Other Assets

Value	Description	Action
-------	-------------	--------

Showing: 0 - 0 of 0 Entries | 25 | < > +



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Adding a Vehicle :

1. Click the **Add** button to enter **Other Assets Details**.
2. A **Other Assets** popup will appear.
3. Enter / Select Value (FJD) , Description Under **Other Assets**.

The screenshot shows the 'Will Application > Details' screen. The background is dimmed, showing fields for Will Ref No (WILL24092500001), Lead Ref No (LEAD24092500001), Applied Date (25 Sep 2024), Application Status (Providing Requirement List), and Application Stage (Provide Requirement List). A sidebar on the left contains icons for My Diary, My Task, Files, CRM, and Will. A central panel has tabs for Application, Process, and History. The 'Application' tab is active, showing sub-tabs for Applicant Details, Spouse Details, and Child Details. The 'Applicant Details' sub-tab is selected, displaying a form with 'Value (FJD)' set to 10000.00 and 'Description' set to 'Computers'. A popup window titled 'Applicant Details' is overlaid on the screen, containing the same form fields. The popup has a close button (X) in the top right corner. At the bottom of the screen, there is a 'Value' field and an 'Action' button.

4. Click the **Save** button to save **Other Assets**.
5. Click the **Clear** button to remove the entered or selected details.
6. Click the **Close** button to close the popup window.

Editing a Vehicle :

7. Click on the **Open** button and navigate to the **Other Assets** pop-up screen.
8. Enter / Select Value (FJD) , Description Under **Other Assets**.



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The screenshot shows the 'Will Application > Details' page. The main content area displays application information: Will Ref No (WILL24092500001), Lead Ref No (LEAD24092500001), Applied Date (25 Sep 2024), and Application Stage (Provide Requirement List). A sidebar on the left contains navigation links: My Diary, My Task, Files, CRM, and Will. A table at the bottom lists assets with columns for Value and Description. A popup window titled 'Applicant Details' is open, showing a form with fields for Value (FJD) and Description. The Value field contains '10000.00' and the Description field contains 'Computers'. The popup window has a close button (X) and a refresh button (circular arrow).

9. Click the **Update** button to save the changes.
10. Click the **Refresh** button to refresh all the entered previous values.
11. Click the **Close** button to exit the popup window.

Process Tab:

This section contains details such as the process to complete the creation of the application.

Provide Requirement List:

User: Estate Officer

Action Status : Approved

1. The tab shows key information, including the **Assigned Officer**, **Assigned Date**, and the **Turnaround Time (TAT)** for processing.
2. **Requirement List Document** will be displayed and In the **Action** column, the following options will be displayed: **Download**: To download the document.



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Will Application > Details

Will Ref No: WILL24092500001 | Lead Ref No: LEAD24092500001 | Applied Date: 25 Sep 2024 | Application Stage: Provide Requirement List

Application Status: Providing Requirement List | Action Status: Approved

Application | **Process** | History

Provide Requirement List

Assigned Officer: Estate Officer 1 | Assigned Date: 25 Sep 2024

Document Name	Actions
Provide Requirement List	↓

Notes * 0 / 250

Cancel | Requirement List Provided

Adding Notes:

3. Navigate to the **Notes** tab.
4. Enter the relevant information in the **Notes** field.
5. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

6. After uploading all mandatory documents, click on the **Requirement List Provided** button to complete this stage and move to the next step in the process.

Canceling the Stage:

7. If necessary, you can click the **Cancel** button to terminate the current stage.

Collect Initial Document:

User: Estate Officer

Action Status : Approved

Submit and manage the required documents to complete this step.

1. Click the Detail Tab and display the following fields under “**Assigned Officer**” name and “**Assigned Date**”, “**Turnaround Time (TAT)**”.
2. Click and Select the “**Document Type**” from the Document Type Drop-down List.
3. Click Browse or Drag & drop option to upload the document for selected Document Type.
4. Click the “**Upload**” button near the delete button.
5. Click the “**Delete**” button to delete the selected document.



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6. Once Uploaded the Document will display in a grid with Document Name , File Name , Size , Action.
7. Click the **Download** button symbol under the Action field to download the uploaded document.
8. Click the **Eye** button symbol under the Action field to view the uploaded document.
9. Click the **Delete** button symbol under the Action field to delete the uploaded document.

Adding Notes:

10. Navigate to the **Notes** tab.
11. Enter the relevant information in the **Notes** field.
12. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

13. After uploading all mandatory documents, click on the **Initial Document Collected** button to complete this stage and move to the next step in the process.

Canceling the Stage:

14. If necessary, you can click the **Cancel** button to terminate the current stage.

Identify Testator / Testatrix and beneficiary:

User: Estate Officer

Action Status : Approved

1. Click the Detail Tab and display the following fields under “**Assigned Officer**” name and “**Assigned Date**” , “**Turnaround Time (TAT)**”.



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Adding Notes:

2. Navigate to the **Notes** tab.
3. Enter the relevant information in the **Notes** field.
4. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

5. After uploading all mandatory documents, click on the **Testator / Testatrix and Beneficiary Identified** button to complete this stage and move to the next step in the process.

Canceling the Stage:

6. If necessary, you can click the **Cancel** button to terminate the current stage.

Collect Beneficiary Documents:

User: Estate Officer

Action Status : Approved

1. Click the Detail Tab and display the following fields under “**Assigned Officer**” name and “**Assigned Date**”, “**Turnaround Time (TAT)**”.
2. Click and Select the “**Document Type**” from the Document Type Drop-down List.
3. Click Browse or Drag & drop option to upload the document for selected Document Type.
4. Click the “**Upload**” button near the delete button.
5. Click the “**Delete**” button to delete the selected document.
6. Once Uploaded, the Document will display in a grid with Document Name , File Name , Size , Action.



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7. Click the **Download** button symbol under the Action field to download the uploaded document.
8. Click the **Eye** button symbol under the Action field to view the uploaded document.
9. Click the **Delete** button symbol under the Action field to delete the uploaded document.

Document Name	File Name	Size	Action
Willmaker and Beneficiary Identification Documentation *	images(2).png	0.01mb	Download, View, Delete
Photo ID *	images(1).png	0.01mb	Download, View, Delete
Birth Certificate of Beneficiary *	Birth Certificate for Beneficiary(4).png	0.01mb	Download, View, Delete

Adding Notes:

10. Navigate to the **Notes** tab.
11. Enter the relevant information in the **Notes** field.
12. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

13. After uploading all mandatory documents, click on the **Beneficiary Documents Collected** button to complete this stage and move to the next step in the process.

Canceling the Stage:

14. If necessary, you can click the **Cancel** button to terminate the current stage.

Interview Testator / Testatrix:

User: Estate Officer

Action Status : Approved

1. Click the Interview Testator / Testatrix section and display the following fields under “**Assigned Officer**” name and “**Assigned Date**”, “**Turnaround Time (TAT)**”.
2. Select / check the checkbox under Interview Testator / Testatrix.
3. If ‘**Whether Assistance Required**’ is checked, the ‘**Assistance Name**’ needs to be entered.



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4. Click the **save** button to save the checked checklist.
5. Click and Select the **“Document Type”** from the Document Type Drop-down List.
6. Click Browse or Drag & drop option to upload the document for selected Document Type.
7. Click the **“Upload”** button near the delete button.
8. Click the **“Delete”** button to delete the selected document.
9. Once Uploaded,the Document will display in a grid with Document Name , File Name , Size , Action.
10. Click the Download button symbol under the Action field to download the uploaded document.
11. Click the Delete button symbol under the Action field to delete the uploaded document.
12. Click the **Eye** button symbol under the Action field to view the uploaded document.

Will Application > Details

Will Ref No: WILL24092500001 | Lead Ref No: LEAD24092500001 | Applied Date: 25 Sep 2024 | Application Stage: Interview Testator / Testatrix

Application Status: Interviewing Testator / Testatrix | Action Status: Approved

Interview Testator / Testatrix

Assigned Officer: Estate Officer 1 | Assigned Date: 25 Sep 2024

Checklist:

1. Whether He/ She is in Death bed	<input checked="" type="checkbox"/>	8. Whether He/She is influenced by others	<input type="checkbox"/>
2. Whether He/ She can able to understand the terms	<input checked="" type="checkbox"/>	9. Whether Assistance Required	<input checked="" type="checkbox"/>
3. Whether He/She has the Mental Ability	<input checked="" type="checkbox"/>	10. Is Assistance from family	<input type="checkbox"/>
4. Whether He/ She is a oldage person	<input checked="" type="checkbox"/>	Assistance Name *	
5. Whether He/ She is in illness	<input checked="" type="checkbox"/>	Shakshi Reddy	
6. Whether He/ She has difficulty in communication	<input type="checkbox"/>		
7. Whether doctor opinion required	<input type="checkbox"/>		

Document Type: Interview Testator / Testatrix

Document Name: Will Instruction Form * | File Name: images(4).png | Size: 0.01mb | Action: Download, Delete, View

Adding Notes:

15. Navigate to the **Notes** tab.
16. Enter the relevant information in the **Notes** field.
17. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

18. After uploading all mandatory documents, click on the **Interview Completed** button to complete this stage and move to the next step in the process.

Canceling the Stage:

19. If necessary, you can click the **Cancel** button to terminate the current stage.

Prepare Will Draft:

User: Estate Officer



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Action Status : Pending Approval

1. Click the Prepare Will Draft section and display the following fields under “**Assigned Officer**” name and “**Assigned Date**”, “**Turnaround Time (TAT)**”.
2. Click Browse or Drag & drop option to upload the document for selected Document Type.
3. Click the “**Upload**” button near the delete button.
4. Click the “**Delete**” button to delete the selected document.
5. Once Uploaded,the Document will display in a grid with Document Name , File Name , Size , Action.
6. Click the Download button symbol under the Action field to download the uploaded document.
7. Click the Delete button symbol under the Action field to delete the uploaded document.
8. Click the **Eye** button symbol under the Action field to view the uploaded document.

Will Application > Details

Will Ref No: WILL24092500001
Lead Ref No: LEAD24092500001
Applied Date: 25 Sep 2024
Application Stage: Prepare Will Draft
Application Status: Preparing Will Draft
Action Status: Pending Approval

Interview Testator / Testatrix

Prepare Will Draft

Assigned Officer: Estate Officer 1
Assigned Date: 25 Sep 2024

Upload

Drag & drop files or [Browse](#)
Supported Format : jpg, jpeg, png, tiff, gif, doc, pdf, DOCX, ppt, csv

Uploaded Document

File Name	File Size
images(5).png	0.01 MB
Format	.png

Notes: 0 / 250

Document Name, File Name, Size, Action

Adding Notes:

9. Navigate to the **Notes** tab.
10. Enter the relevant information in the **Notes** field.
11. Click the **Save** button below the notes field to store the entered notes.
12. Click the **Open** Button in the **Action** column to open the **Trust Withdrawal Application > Detail > Add Notes** popup.
13. In the popup, select the **Action Status** as and enter relevant notes.



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Will Application > Details

Will Ref No: WILL24092500001 | Lead Ref No: LEAD24092500001 | Applied Date: 25 Sep 2024 | Application Stage: Prepare Will Draft

Application Status: Preparing Will Draft | Action Status: Pending Approval

Assigned Officer: Estate Officer 1 | Assigned Date: 25 Sep 2024

Notes: 0 / 250

Trust Withdrawal Application > Detail > Add Notes

Action Status: Pending Approval | Application Status: Preparing Will Draft | Application Stage: Prepare Will Draft

Notes: 14 / 250

Notes: Status changed

Uploaded Document

File Name: images(5).png | Format: .png

Designation	User Name	Verified Date	Action
General Manager	Estate Officer 1		

Buttons: Cancel, Will Draft Prepared

14. Click the **Save** button below the notes field to store the entered notes.
15. Click the **Clear** button to remove the entered or selected details.
16. Click the **Close** button to close the popup window.

Will Application > Details

Will Ref No: WILL24092500001 | Lead Ref No: LEAD24092500001 | Applied Date: 25 Sep 2024 | Application Stage: Prepare Will Draft

Application Status: Preparing Will Draft | Action Status: Approved

Notes: 14 / 250

Trust Withdrawal Application > Detail > Add Notes

Action Status: Approved | Application Status: Preparing Will Draft | Application Stage: Prepare Will Draft

Notes: Status Changed

Uploaded Document

File Name: - | Format: -

Designation	User Name	Verified Date	Action
General Manager	Estate Officer 1		
General Manager	Manager Estate Trust Officer1		

Buttons: Cancel, Will Draft Prepared

Status Flow:

User: Estate Officer

- Change the status to **“Pending Approval”**.



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User: Manager

- Change the status from **Pending Approval** to **Approved**.

Completing the Stage:

17. After uploading all mandatory documents, click on the **Will Draft Approved** button to complete this stage and move to the next step in the process.

Canceling the Stage:

18. If necessary, you can click the **Cancel** button to terminate the current stage.

Review draft with Testator / Testatrix:

User: Estate Officer

Action Status : Approved

1. The tab shows key information, including the **Assigned Officer**, **Assigned Date**, and the **Turnaround Time (TAT)** for processing.
2. Check **Document Name** will be displayed and In the **Action** column, the following options will be displayed: **Download**: To download the document.

Will Application > Details

Will Ref No: WILL24092500001 | Lead Ref No: LEAD24092500001 | Applied Date: 25 Sep 2024 | Application Stage: Review draft with Testator / Testatrix

Application Status: Reviewing Will Draft with Testator / Testatrix | Action Status: Approved

Identity Testator / Testatrix and Beneficiary

Collect Beneficiary Document

Interview Testator / Testatrix

Prepare Will Draft

Review Draft with Testator / Testatrix

Assigned Officer: Estate Officer 1 | Assigned Date: 25 Sep 2024

Document Name	Actions
Prepared Will Draft	↓

Notes: Review Draft Provided

21 / 250

Cancel | Review Draft Provided

Adding Notes:

3. Navigate to the **Notes** tab.
4. Enter the relevant information in the **Notes** field.
5. Click the **Save** button below the notes field to store the entered notes.



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Completing the Stage:

6. After uploading all mandatory documents, click on the **Will Draft reviewed with Testator / Testatrix** button to complete this stage and move to the next step in the process.

Canceling the Stage:

7. If necessary, you can click the **Cancel** button to terminate the current stage.

Obtain Signature from the Testator / Testatrix:

User: Estate Officer

Action Status : Approved

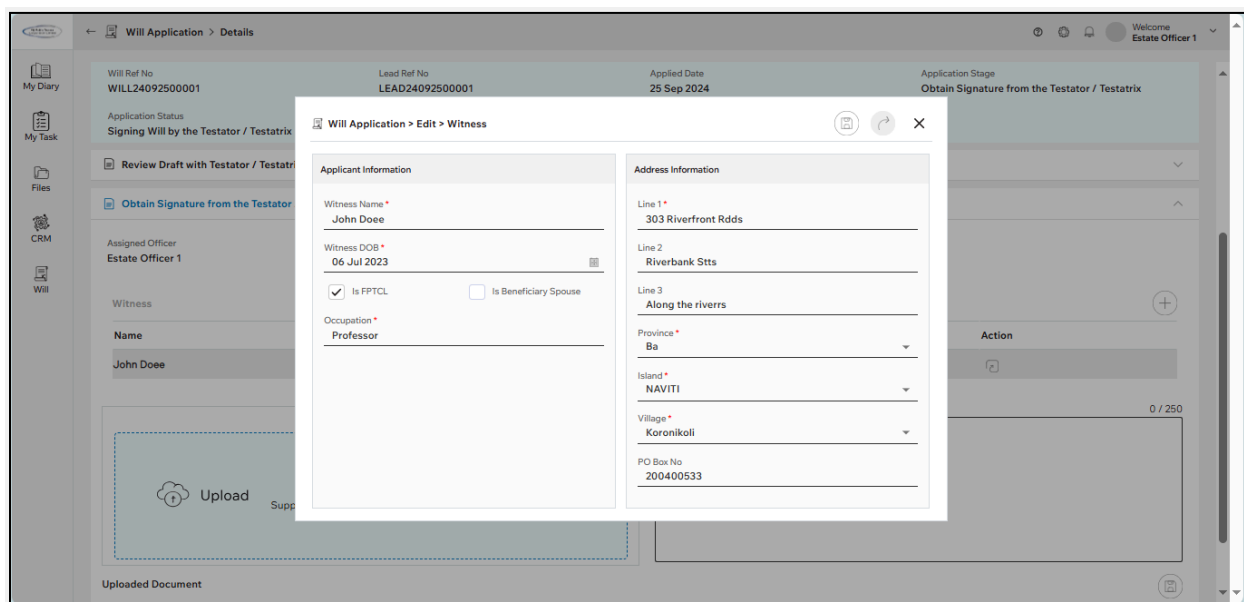
Adding a Witness Details:

1. Click the **Obtain Signature from the Testator / Testatrix** section and display the following fields under “**Assigned Officer**” name and “**Assigned Date**”, “**Turnaround Time (TAT)**”.
2. Click on the **Add** button and **Will Application > Create New > Witness** pop-up will appear.
3. Enter / Select Witness Name , Witness DOB , Occupation , Checkbox for (Is FPTCL , Is Beneficiary Spouse).
4. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address Information**.

5. Click the **Save** button to save the **Witness details**.
6. Click the **Clear** button to erase the entered or selected details.
7. Click the **Close** button to exit the popup window.

Editing Witness Details:

8. Click on the **“Open”** button and navigate to the **“Will Application > Edit > Witness”** pop-up screen.
9. Click on the **“Edit”** button to edit the **Witness Details**.
10. Enter / Select Witness Name , Witness DOB , Occupation , Checkbox for (Is FPTCL , Is Beneficiary Spouse) under **Witness Information**.
11. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address Information**.



12. Click the **Update** button to save the changes.
13. Click the **Refresh** button to refresh all the entered previous values.
14. Click the **Close** button to exit the popup window.
15. Click the Browse or Drag & drop option to upload the document.
16. Click the **“Upload”** button near the delete button.
17. Click the **“Delete”** button to delete the selected document.



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Will Application > Details

Will Ref No: WIL24092500001, Lead Ref No: LEAD24092500001, Applied Date: 25 Sep 2024, Application Stage: Obtain Signature from the Testator / Testatrix

Application Status: Signing Will by the Testator / Testatrix, Action Status: Approved

Obtain Signature from the Testator / Testatrix

Assigned Officer: Estate Officer 1, Assigned Date: 25 Sep 2024

Witness:

Name	DOB	Occupation	Action
John Doe	06-07-2023	Professor	[Download] [Delete] [Eye]
John Doe	06-07-2023	Professor	[Download] [Delete] [Eye]

Upload: Drag & drop files or [Browse](#). Supported Format: .jpg, .jpeg, .png, .tiff, .gif, .doc, .pdf, .DOCK, .ppt, .cav

Uploaded Document:

File Name	File Size
Images(6).png	0.01 MB

Format: .png

Notes: 0 / 250

Buttons: Cancel, Signature Obtained

18. Once Uploaded, the Document will display in a grid with Document Name, File Name, Size, Action.
19. Click the Download button symbol under the Action field to download the uploaded document.
20. Click the Delete button symbol under the Action field to delete the uploaded document.
21. Click the **Eye** button symbol under the Action field to view the uploaded document.

Adding Notes:

22. Navigate to the **Notes** tab.
23. Enter the relevant information in the **Notes** field.
24. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

25. After uploading all mandatory documents, click on the **Signature Obtained** button to complete this stage and move to the next step in the process.

Canceling the Stage:

26. If necessary, you can click the **Cancel** button to terminate the current stage.

Issue Signed Copy to the Testator / Testatrix:

User: Estate Officer

Action Status : Approved

1. Click the **Issue Signed Copy to the Testator / Testatrix** section and display the following fields under "Assigned Officer" name and "Assigned Date", "Turnaround Time (TAT)".



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2. Check **Document Name** will be displayed and In the **Action** column, the following options will be displayed: **Download**: To download the document.

Adding Notes:

3. Navigate to the **Notes** tab.
4. Enter the relevant information in the **Notes** field.
5. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

6. After uploading all mandatory documents, click on the **Issued Copy Provided** button to complete this stage and move to the next step in the process.

Canceling the Stage:

7. If necessary, you can click the **Cancel** button to terminate the current stage.

Receipt Will Fee + Lodgement Fee:

User: Account Officer

Action Status : Approved

1. Click the **Receipt Will Fee + Lodgement Fee** section and display the following fields under **"Assigned Officer"** name and **"Assigned Date"** & **"Turnaround Time (TAT)"**. Enter / Select Organization Name , Check , DD , Check / Trans No , Date , Amount , Receipt No.



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Will Application > Details

Will Ref No: WILL24092500001 | Lead Ref No: LEAD24092500001 | Applied Date: 25 Sep 2024 | Application Stage: Receipt Will Fee + Lodgement Fee

Application Status: Receipting Will Fee | Action Status: Approved

Receipt Will Fee + Lodgement Fee

Assigned Officer: Legal Officer | Assigned Date: 24 May 2024 | TAT: 5 Days

Date	Check No / Tr. No	Organization	Receipt No	Amount
No records found Try adjusting your search or filter options to find what you're looking for				

Showing: 0-0 of 0 Entries | 25 | < | >

Add New

Organization Name

Cheque / DD

Cheque / Trans No

Date

Amount

Receipt No

Payment Made

- Click on the **"Payment Made"** button to display the entered details.

Completing the Stage:

- After uploading all mandatory documents, click on the **Payment Made** button to complete this stage and move to the next step in the process.

Canceling the Stage:

- If necessary, you can click the **Cancel** button to terminate the current stage.

Register Will with high court:

User: Registry Officer

Action Status : Approved

Linked Documents:

- In this tab, the documents needed from the client are displayed.
- The Trust Officer can download and view these documents as necessary.



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Will Application > Details

Will Ref No: WILL24092500001 | Lead Ref No: LEAD24092500001 | Applied Date: 25 Sep 2024 | Application Stage: Register Will with high court

Application Status: Registering Will with high Court | Action Status: Approved

Receipt Will Fee + Lodgement Fee

Register Will with High Court

Detail | Linked Document

Assigned Officer: Estate Officer 1 | Assigned Date: 25 Sep 2024

Document Type: --Select--

Upload | Drag & drop files or [Browse](#) | Supported Format: jpg, jpeg, png, tiff, gif, doc, pdf, DOCX, ppt, csv

Document Name	File Name	Size	Action
High Court Register Will *	images(8).png	0.01mb	Download Eye Delete
Copy of Register Will Document With High Court*	images(7).png	0.01mb	Download Eye Delete

Notes: Registered will document collected

34 / 250

Cancel | Registered Will Document Collected

Details:

- Click the **Register Will with high court** section and display the following fields under **"Assigned Officer"** name and **"Assigned Date"**, **"Turnaround Time (TAT)"**.
- Click and Select the **"Document Type"** from the Document Type Drop-down List.
- Click Browse or Drag & drop option to upload the document for selected Document Type.
- Click the **"Upload"** button near the delete button.
- Click the **"Delete"** button to delete the selected document.
- Once Uploaded, the Document will display in a grid with Document Name, File Name, Size, Action.
- Click the **Download** button symbol under the Action field to download the uploaded document.
- Click the **Eye** button symbol under the Action field to view the uploaded document.
- Click the **Delete** button symbol under the Action field to delete the uploaded document.

Adding Notes:

- Navigate to the **Notes** tab.
- Enter the relevant information in the **Notes** field.
- Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

- After uploading all mandatory documents, click on the **Will Registered with high Court** button to complete this stage and move to the next step in the process.

Canceling the Stage:

- If necessary, you can click the **Cancel** button to terminate the current stage.



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Collect Registered will:

User: Estate Officer

Action Status : Approved

1. Click the **Collect Registered will** section and display the following fields under “**Assigned Officer**” name and “**Assigned Date**”, “**Turnaround Time (TAT)**”.
2. Check **Document Name** will be displayed and In the **Action** column, the following options will be displayed: **Download**: To download the document.

Adding Notes:

3. Navigate to the **Notes** tab.
4. Enter the relevant information in the **Notes** field.
5. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

After uploading all mandatory documents, click on the **Requirement List Provided** button to complete this stage and move to the next step in the process.

Canceling the Stage:

- If necessary, you can click the **Cancel** button to terminate the current stage.

Update Registered Will in the Records:

User: Registry Officer



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Action Status : Approved

1. Login with the “**Registry Officer**” to process the “**Update Registered Will in the Records**” step.
2. Click the Detail Tab and display the following fields under “**Assigned Officer**” name and “**Assigned Date**” , “**Turnaround Time (TAT)**”.
3. Display the following fields : Testator / Testatrix Name , Contact No , Email , Spouse Name .
4. Display the following fields of **Beneficiary details**: Customer Ref No , Name , Gender , Contact No , Email.
5. Click Browse or Drag & drop option to upload the document for selected Document Type.

Will Application > Details

Will Ref No: WILL24092500002 | Lead Ref No: LEAD24092500003 | Applied Date: 25 Sep 2024 | Application Stage: Complete Will Application

Application Status: Application Completed | Action Status: Approved

Update Register Will with Records

Assigned Officer: Estate Officer 1 | Assigned Date: 25 Sep 2024

Testator / Testatrix Name: Semi Qio | Contact No: 9002345 | Email Id: josua.naliva@example.com | Spouse Name: Qio

Beneficiary

Customer Ref No	Name	Gender	Contact No	Email
CUST24092300006	Semi Qio	Female	9002345	

Document Type: Update Register Will *

Upload | Drag & drop files or [Browse](#) | Supported Format: .jpg, .jpeg, .png, .tiff, .gif, .doc, .pdf, .DOCX, .ppt, .csv

Document Name	File Name	Size	Action
Update Register Will *		0.00mb	
Update Register Will *		0.00mb	
Update Register Will *		0.00mb	

Notes: 0 / 250

6. Click the “**Upload**” button near the delete button.
7. Click the “**Delete**” button to delete the selected document.
8. Once Uploaded Document will display in a grid with Document Name , File Name , Size.
9. Click the **Download** button symbol under the Action field to download the uploaded document.
10. Click the **Delete** button symbol under the Action field to delete the uploaded document.
11. Click the **Eye** button symbol under the Action field to view the uploaded document.

Adding Notes:

12. Navigate to the **Notes** tab.
13. Enter the relevant information in the **Notes** field.
14. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

After uploading all mandatory documents, click on the **Updated Register Document Collected** button to complete this stage and move to the next step in the process.



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Canceling the Stage:

- If necessary, you can click the **Cancel** button to terminate the current stage.

Issue Registered Will Copy:

User: Estate Officer

Action Status : Approved

1. Click the **Issue Registered Will Copy** section and display the following fields under “**Assigned Officer**” name and “**Assigned Date**”, “**Turnaround Time (TAT)**”.
2. Check **Document Name** will be displayed and In the **Action** column, the following options will be displayed: **Download**: To download the document.

The screenshot displays the 'Will Application > Details' page. The top section shows application metadata: Will Ref No (WILL24092500002), Lead Ref No (LEAD24092500003), Applied Date (25 Sep 2024), Application Status (Application Completed), and Action Status (Approved). Below this, a list of actions is shown: 'Register Will with High Court', 'Collect Registered Will', 'Update Register Will with Records', and 'Issued Registered Will Copy' (which is selected). The 'Issued Registered Will Copy' section displays the Assigned Officer (Estate Officer 1) and Assigned Date (25 Sep 2024). A table with two columns, 'Document Name' and 'Actions', is shown with one row: 'Register Will' and a downward arrow. To the right of the table is a 'Notes' field with the text 'Will Copy Issued' and a character count of '16 / 250'. At the bottom right, there are 'Cancel' and 'Will Copy Issued' buttons.

Adding Notes:

3. Navigate to the **Notes** tab.
4. Enter the relevant information in the **Notes** field.
5. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

6. After uploading all mandatory documents, click on the **Registered Will Copy Issued** button to complete this stage and move to the next step in the process.

Canceling the Stage:

7. If necessary, you can click the **Cancel** button to terminate the current stage.



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Complete Will Application:

User: Estate Officer

Action Status : Approved

Will Application > Details

Will Ref No: WILL24092500002
Lead Ref No: LEAD24092500003
Applied Date: 25 Sep 2024
Application Stage: Complete Will Application

Application Status: Application Completed
Action Status: Approved

Register Will with High Court
Collect Registered Will
Update Register Will with Records
Issued Registered Will Copy
Complete Will Application

Assigned Officer: Estate Officer 1
Assigned Date: 25 Sep 2024

Notes: 0 / 250

Will Application Completed

1. Click the **Complete Will Application** section and display the following fields under “**Assigned Officer**” name and “**Assigned Date**”, “**Turnaround Time (TAT)**”.
2. Enter the relevant notes in the **Notes** field.
3. Click the **Save** button below the notes field to store the entered notes.
4. Complete the stage by clicking on **Will Application Completed**.



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History:

The History tab contains the following sub-tabs:

The screenshot displays the 'Will Application > Details' page. The top section contains application metadata: Will Ref No (WILL24092500002), Lead Ref No (LEAD24092500003), Applied Date (25 Sep 2024), and Application Stage (Complete Will Application). Below this, the Application Status is 'Application Completed' and the Action Status is 'Approved'. The 'History' tab is selected, showing sub-tabs for 'Status History' and 'Communication History'. The left sidebar includes navigation options: My Diary, My Task, Files, CRM, and Will. The top right corner shows a user profile for 'Welcome Estate Officer 1'.

Notes:

- All notes entered at each stage of the process will be listed here.

Assigned Officer:

- Displays the following details: Assigned Officer, Assigned Date, Assigned By, Status values

Status History:

- Shows the status flow and details, including: Officer Name, Date, Time

Communication History:

- Provides details of communication, including: To (recipient), Date | Time, Status, Action.
- Includes all email history related to the respective officers.

****END OF DOCUMENT****