



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



### Organization Change In Detail

**Users: Organization Creation Officer, Organization Verification Officer.**

The screenshot displays the 'Organization Change > Details' page. The top section shows organization details: Org App Ref No (OA240900009), Organization Name (Global Tech Solution), Organization Ref No (ORG240900002), and Organization Status (Active). Below this, the 'Application' tab is selected, showing 'Organization Application Information'. The 'Contact Person' section lists Ava Taylor, Sales Manager, with email ID ava.taylor@email.com and status Active. The 'Bank' section lists Canara Bank with Bank Code 69874, IFSC Code IFSC9876516, and status Active. The left sidebar contains navigation icons for Admin, My Diary, My Task, Files, Organization, CRM, Trust, Will, and Estate. The top right shows a welcome message for the Organization Creation Officer.

Org App Ref No	Organization Name	Organization Ref No	Organization Status
OA240900009	Global Tech Solution	ORG240900002	Active

Name	Designation	Email ID	Status	Action
Ava Taylor	Sales Manager	ava.taylor@email.com	Active	[Edit]

Bank Name	Bank Code	IFSC Code	Status	Action
Canara	69874	IFSC9876516	Active	[Edit]

### Application Tab

#### Organization Application Information Section:

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



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Organization Change > Details

Org App Ref No: OA24090009

Application Type: Change In Details Organization Application

Application Status: Pending Submission

**Organization Details**

Organization Name: Global Tech Solution

Organization Type: Education

Email ID: info@globaltech.com

Contact No: 9849651984

Website: www.globaltech.com

Effective Date: 17 Sep 2024

**Address Details**

Line 1: 123 Innovation Road

Line 2: Suite 500

Line 3: Tower A

Province: Kadavu

Island: KADAVU

Village: Naibaci

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.



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Organization Change > Details

Org App Ref: OA2409001

Organization: Education

Contact Person Details

Contact Person Name: Ava Taylor

Contact No: 4567564589

Email ID: ava.taylor@email.com

Designation: Sales Manager

Date Of Birth: 04 Feb 1975

Gender: Male

Status: Active

Contact Person Identification Details

Voter ID: VTR567890

Driving License: DL1234567890

PF No: PF00567

Canara 69874 IFSC9876516 Active

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.



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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.



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Organization Change > Details

Welcome  
Organization Creation Officer

Org App Ref: OA2409001

Organization Education

info@global

Website: www.global

Application Status: Pending Su

Contact

Bank

Bank Name: Canara

Bank Code: 69874

IFSC Code: IFSC9876516

Swift Code: SWC987466

Additional Information

Account No: 9846165119994949

Account Status: Active

Bank Address

Line 1: 1CROSS

Line 2:

Line 3:

Province: Cakaudrove

Island: TAVEUNI

Village: Welagi

PO Box No: 975648

Canara 69874 IFSC9876516 Active

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.



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The screenshot shows a web application interface. At the top, there's a header with 'Organization Change > Details' and a user profile 'Welcome Organization Creation Officer'. A sidebar on the left contains icons for Admin, My Diary, My Task, Files, Organization, CRM, Trust, Will, and Estate. The main content area displays a 'Create Bank' dialog box. The dialog box has a title bar 'Customer > Details > Create Bank' and a close button. Inside, it says 'Enter Bank Code and to continue' and has a 'Bank Code' input field with a red asterisk. Below the input field is a 'Get Info' button. The background is slightly dimmed, showing a table with bank details.

Bank Name	Bank Code	IFSC	Status
Canara	69874	IFSC9876516	Active

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.



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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.



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The screenshot displays the 'Organization Change > Details' page. At the top, there's a header with navigation icons and a user profile 'Welcome Organization Creation Officer'. Below this, a light blue box contains organization details: Org App Ref No (OA240900009), Organization Name (Global Tech Solution), Organization Ref No (ORG240900002), and Organization Status (Active). Another row shows Organization Type (Education), Effective Date (17 Sep 2024), and Status (Pending Submission). Below this, there are tabs for 'Application', 'Upload Document' (selected), and 'History'. The 'Upload Document' section features a table with columns: Document Name, File Name, Size, and Action. One document is listed: 'Digital Signature Certificate of Director' with file name '1.png' and size '0.11 MB'. To the right of the table is a 'Document Type' dropdown set to '--Select--' and a large dashed box for file upload with an 'Upload' button and a list of supported formats: jpg, jpeg, png, tiff, gif, doc, pdf, DOCX, ppt, csv.

Document Name	File Name	Size	Action
Digital Signature Certificate of Director	1.png	0.11 MB	↓ 🗑️ 👁️

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".





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- 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.



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- 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.

The screenshot displays the 'Organization Change > Details' page. The top section shows organization details: Org App Ref No (OA240900009), Organization Name (Global Tech Solution), Organization Ref No (ORG240900002), Organization Status (Active), Organization Type (Education), and Effective Date (17 Sep 2024). The status is 'Pending Submission'. Below this, there are tabs for 'Application', 'Upload Document', and 'History'. The 'History' tab is active, showing a table of assigned officers. The table has columns: Assigned Officer, Assigned Date, Assigned By, and Status. The data row shows 'Organization Creation Officer' assigned on '19 Sep 2024' by 'Organization Creation Officer' with a status of 'Pending Submission'. Below the table, there are sections for 'Status History' (1 entry) and 'Communication History' (0 entries). The 'Status History' section shows a 'Pending Submission' status change on '19 Sep 2024 | 12:27 PM'.

Assigned Officer	Assigned Date	Assigned By	Status
Organization Creation Officer	19 Sep 2024	Organization Creation Officer	Pending Submission

- 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.



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Organization Change > Details

Welcome Organization Creation Officer

Org App Ref No OA240900009	Organization Name Global Tech Solution	Organization Ref No ORG240900002	Organization Status Active
Organization Type Education	Effective Date 17 Sep 2024	Status Pending Submission	

Application Upload Document History

Notes 0

Assigned Officer 1

Status History 1 Communication History 0

Pending Submission  
19 Sep 2024 | 12:27 PM

### 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.

Organization Change > Details

Welcome Organization Creation Officer

Org App Ref No OA240900009	Organization Name Global Tech Solution	Organization Ref No ORG240900002	Organization Status Active
Organization Type Education	Effective Date 17 Sep 2024	Status Pending Submission	


Application Upload Document History

Notes 0

Assigned Officer 1

Status History 1 Communication History 0

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

To	Date   Time	Status	Action
 No records found Try adjusting your search or filter options			

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**Fiji Public Trustee Corporation Limited**  
**Organization Module- User Manual**

