



Trust Settlement

User: Trust Application Creation Officer

This screen helps to Create, Search and Open the Trust Application. To navigate to this screen click on the **Trust Application** from the menu and click **Trust Settlement**.

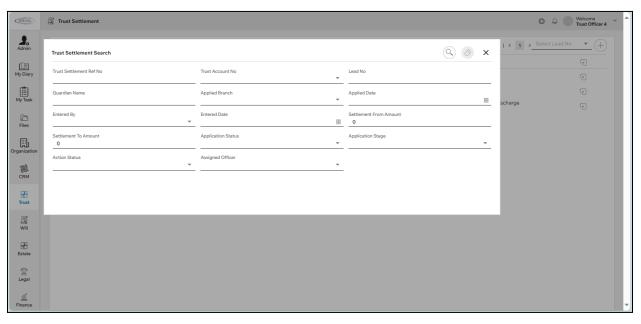


Search Criteria:

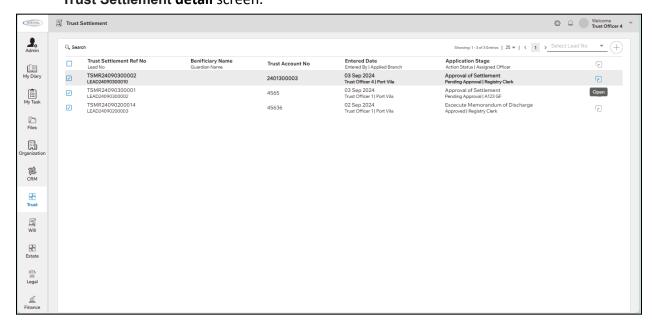
- 1. Click **Search** button, **Trust Settlement Search** pop up will be displayed, wherein the user can search based on the given parameters.
- 2. Enter/Select any of the fields among Trust Settlement Search criteria.







- 3. Click the **Search** icon on top of the pop up to get corresponding results.
- 4. Click the Clear icon next to the search icon to clear all the entered values in the fields.
- 5. Click the **Open** icon under the action column directly or check the checkbox near the **Trust Settlement Ref No** and click the **Open** icon in the table header to navigate to the **Trust Settlement detail** screen.



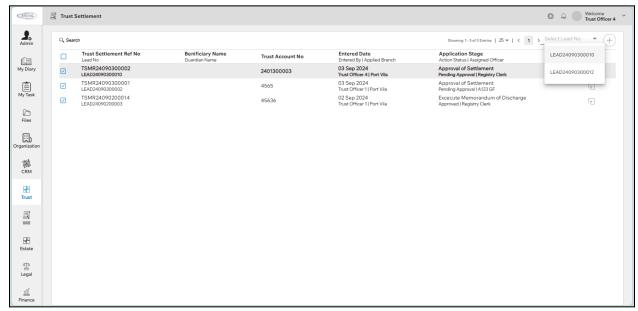




- 6. If want to open multiple details then click select all checkbox in the table header and click the **Open** icon in the table header.
- 7. Select the page number to directly go to that particular page.
- 8. Click the **Next (>)** button on the top right corner to navigate to the next page.
- 9. Click the **Previous (<)** button on the top right corner to navigate to the previous page.
- 10. Select the Records count on the top right corner to show the required number of records per page.

Create New Trust Application:

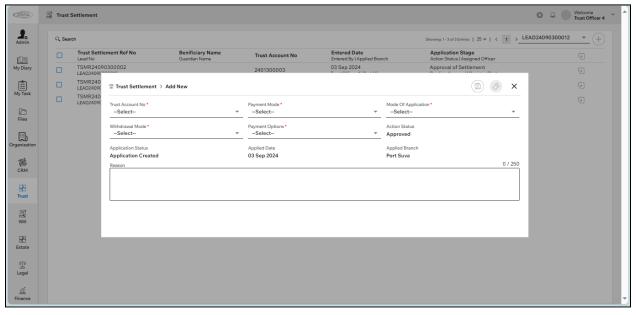
11. To create a new Trust Settlement and select the Lead No from the Drop-down list and Click Add Button.



- 12. Trust Settlement Add New Popup will display, Select the Trust Account No , Payment Mode , Mode Of Application , Withdrawal Mode , Payment Option from DDL.
- 13. If the Payment Option "Overseas" is selected, you need to enter Bank Address details.
- 14. If the Payment Option "Domestic" is selected, Not required to enter Bank Address Details.







- 15. Click **Save** to save the details.
- 16. Click the Clear icon next to the search icon to clear all the entered values in the fields.
- 17. Click on the "Close" button to close the popup.

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