



## Fiji Public Trustee Corporation Limited Legal & Other Service Module- User Manual



### Legal & Other Service Detail

**User Roles: Legal Officer , Accounts Officer**

**Overview:**

This screen allows users to view, create, and process Legal & Other Service Applications. The system will display the Legal & Other Service Application's parent details in the header.

Legal & Other Service

Welcome Lavenia Silatolu

Legal Ref No LEGL24100100006	Lead Ref No LEAD24100100003	Type Court Application	Applied Date 01 Oct 2024
Entered By Lavenia Silatolu	Application Stage Collection of Documentation	Application Status Application Created	Action Status Approved

Application Process History

Applicant Details

General Information Communication Address

Name  
-

Date Of Birth  
-

Gender  
-

Occupation  
-

Home Contact  
-

Office Contact  
-

Email  
-

Members Involved

#### Application Tab:

This section contains essential information, such as Applicant details and Members Involved sections.



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The screenshot displays the 'Legal & Other Service' module interface. The top header shows the user's name 'Lavenia Silatolu' and a welcome message. The main content area is divided into sections for application details and applicant information.

Legal Ref No	Lead Ref No	Type	Applied Date
LEGL24100100006	LEAD24100100003	Court Application	01 Oct 2024

Entered By	Application Stage	Application Status	Action Status
Lavenia Silatolu	Collection of Documentation	Application Created	Approved

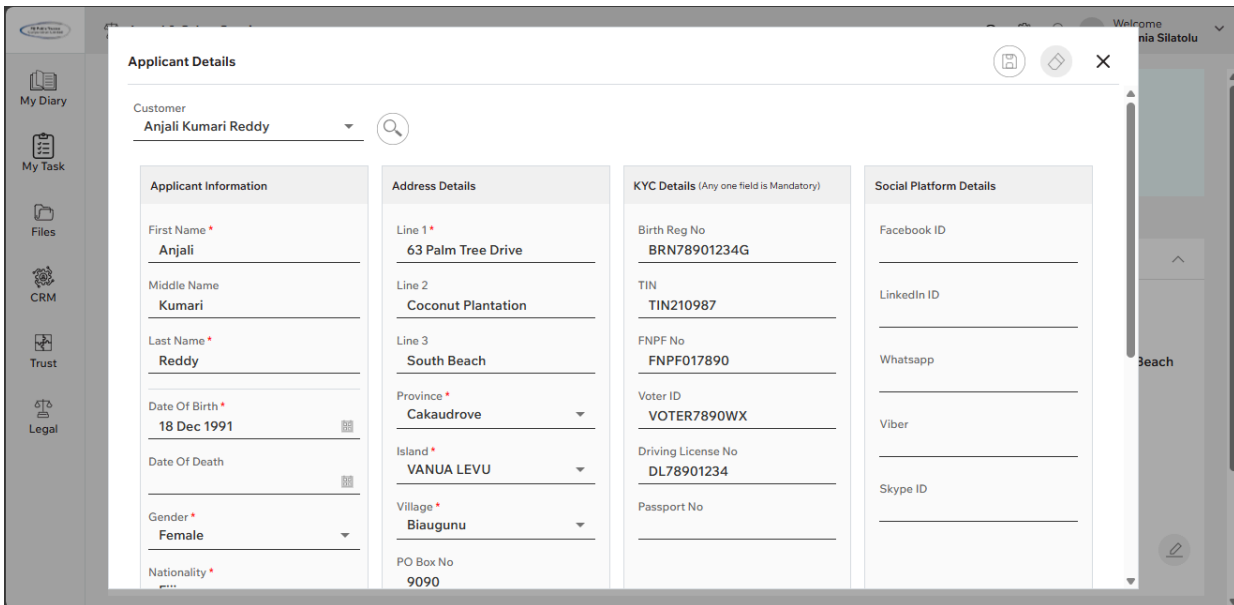
Below the application details, there are tabs for 'Application', 'Process', and 'History'. The 'Application' tab is active, showing 'Applicant Details'.

General Information	Communication	Address
Name	Home Contact	
Date Of Birth	Office Contact	
Gender	Email	
Occupation		

### Applicant Details Section :

#### Adding a Applicant Details:

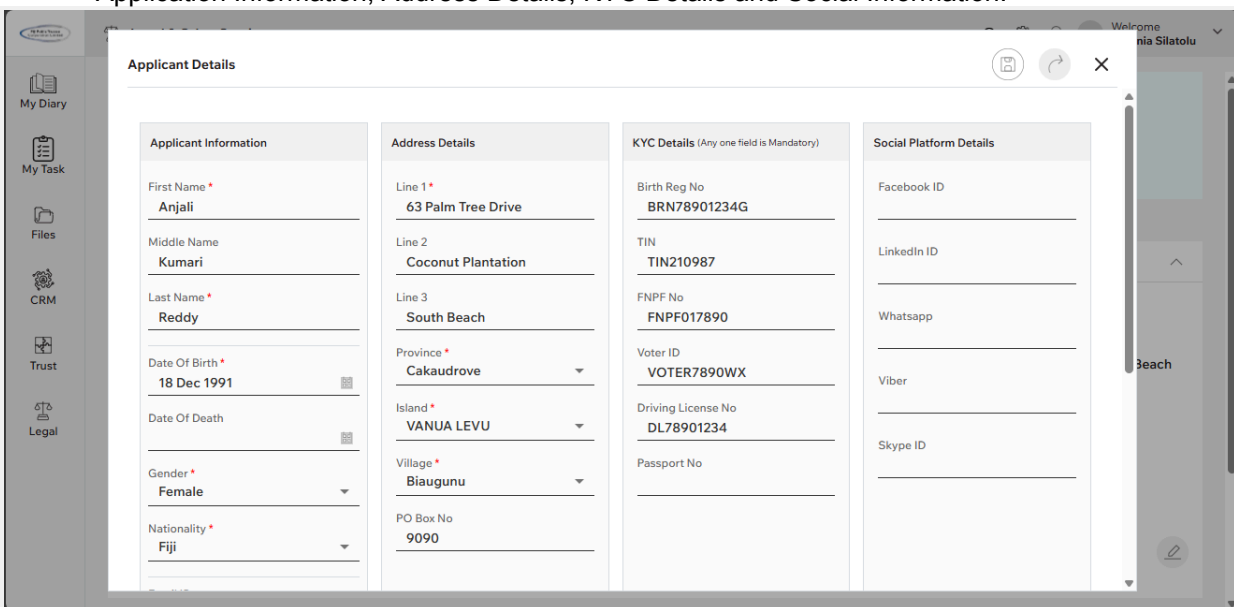
1. Click the **Edit** button to enter "**Applicant Details**".
2. An **Applicant Details** popup will appear.
3. Choose the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new Applicant details such as Application Information,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



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

## Editing Applicant Details:

7. Click On **Edit** button to open **Edit Applicant Details** Popup.
8. Enter/Select to Change the Customer details manually enter new Applicant details such as Application Information, Address Details, KYC Details and Social Information.



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



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

### Member Involved Section :

Select the **Member Involved** to proceed to the **Member Involved** Section.

The screenshot displays the 'Legal & Other Service' module interface. The top navigation bar includes the 'Legal & Other Service' title and a user profile for 'Lavenia Silatolu'. The left sidebar contains icons for 'My Diary', 'My Task', 'Files', 'CRM', 'Trust', and 'Legal'. The main content area shows a summary of a legal application with the following details:

Legal Ref No	Lead Ref No	Type	Applied Date
LEGL24100100006	LEAD24100100003	Court Application	01 Oct 2024
Entered By	Application Stage	Application Status	Action Status
Lavenia Silatolu	Collection of Documentation	Application Created	Approved

Below the summary, the 'Members Involved' section is active, showing a table with columns: Member No, Member Name, Gender, Date Of Birth, Contact No, Is FPTCL, Type, and Action. The table is currently empty, displaying a message: 'No records found. Try adjusting your search or filter options to find what you're looking for.'

### Adding Members Involved :

1. Click the **Add** button to enter Members Involved Details.
2. A **Members Involved 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 Member Information, Address Details, KYC Details and Social Information.
4. The Customer Type will be vary based on the selected legal service type.



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**Members Involved Details**

Customer: Arjun Kumar Singh

Member Information	Address Details	KYC Details (Any one field is Mandatory)	Social Platform Details
First Name * Arjun	Line 1 * 23 Garden Grovess	Birth Reg No BRN56789012	Facebook ID John@123
Middle Name Kumar	Line 2 Orchard Hill	TIN TIN543210	LinkedIn ID linkedin.com/in/user00?
Last Name * Singh	Line 3 East Field	FNPF No FNPF0056788	Whatsapp 7981234505
Is FPTCL <input checked="" type="radio"/> Yes	Province * Malampa	Voter ID VOTER5678MN	Viber 7981234505
Occupation *	Island * Pele	Driving License No DL56789014	Skype ID Skp6357813
Customer Type * Client	Village * Natadola	Passport No P5678901E	
Date Of Birth *	PO Box No 4040		

5. Click the **"Save"** button to save the Members Involved and display the saved details in the Members Involved grid.
6. Click the **Clear** button to remove the entered or selected details.
7. Click the **Close** button to close the popup window.

Legal Ref No: LEGL24100100006  
Entered By: Lavenia Silatolu

Lead Ref No: LEAD24100100003  
Application Stage: Collection of Documentation

Type: Court Application  
Application Status: Application Created

Applied Date: 01 Oct 2024  
Action Status: Approved

**Members Involved**

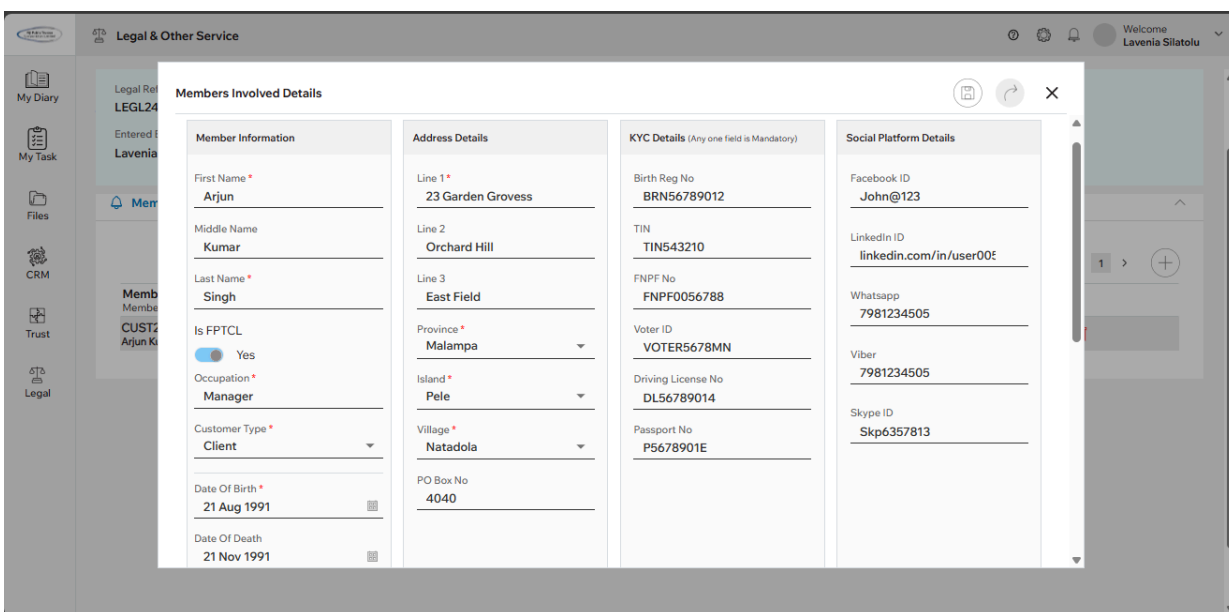
Showing: 1 - 2 of 2 Entries | 25 | 1 | +

Member No	Gender	Date Of Birth	Contact No	Is FPTCL	Type	Action
CUST240821000002 Arjun Kumar Singh	Male	21 Aug 1991	9876543210	Yes	Client	
CUST231216000007 Demo Test DT	Male	01 Dec 2023	9870654213	Yes	Second party	

8. Click the **Delete** button to remove the saved member involvement details from the grid.

### Editing Members Involved:

1. Click On **Open** button to open **Edit Members Involved Details** Popup and click on **Edit** button.
2. Enter / Select Member Information , Address Details, KYC Details, Social Platform Details.



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

### Process Tab:

This section contains the steps required to complete the application process.

### Collection Of Documents:

**User: Legal Officer**

**Action Status : Approved**

Submit and manage the required documents to complete this step.

1. Click on **Collection of Documents** to display the following fields: "**Assigned Officer name** , "**Assigned Date,**" and "**Turnaround Time (TAT).**"
2. Select the **Document Type** from the Document Type drop-down list.
3. Click **Browse** or use the drag-and-drop option to upload the document for the selected Document Type.
4. Click the "**Upload**" button next to the delete button.
5. Click the **Delete** button to remove the selected document.
6. Once uploaded, the document will be displayed in a grid with the following columns: **Document Name, File Name, Size, and Action.**



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

The screenshot displays the 'Legal & Other Service' application interface. The top header shows the user's name 'Lavenia Silatolu' and a 'Welcome' message. The main content area is divided into several sections:

- Legal Ref No:** LEGL24100100006
- Lead Ref No:** LEAD24100100003
- Type:** Court Application
- Applied Date:** 01 Oct 2024
- Entered By:** Lavenia Silatolu
- Application Stage:** Collection of Documentation
- Application Status:** Application Created
- Action Status:** Approved

The 'Collection Of Documents' stage is active, showing the 'Assigned Officer' as Lavenia Silatolu and the 'Assigned Date' as 01 Oct 2024. Below this, there is a 'Document Type' dropdown menu set to 'Rental Agreement \*'. A large dashed box contains an 'Upload' button and instructions: 'Drag & drop files or [Browse](#). Supported Format: .jpg, .jpeg, .png, .tiff, .gif, .doc, .pdf, .DOCX, .ppt, .csv'. To the right, a table lists the uploaded documents:

Document Name	File Name	Size	Action
Rental Agreement *	PRSRQ0000373.png	0.10mb	Download, View, Delete

At the bottom, there is a 'Notes' field with a character count of 0 / 250. A 'Documents Collected' button and a 'Cancel' button are located at the bottom right.

### 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 information.

### Completing the Stage:

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

### Canceling the Stage:

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

## Fees Collection:

User: Account Officer

Action Status : Approved

1. Click on the **Receipt Will Fee + Lodgement Fee** section to display the following fields: "Assigned Officer" name, "Assigned Date," and "Turnaround Time (TAT)". Enter or select the following details: **Organization Name, Check, DD, Check/Trans No, Date, Amount, and Receipt No.**



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The screenshot displays the 'Legal & Other Service' module interface. At the top, a header bar shows 'Legal & Other Service' and a user profile 'Welcome Lavenia Silatolu'. Below this, a summary section contains the following details:

- Legal Ref No: LEGL24100100006
- Lead Ref No: LEAD24100100003
- Type: Court Application
- Applied Date: 01 Oct 2024
- Entered By: Lavenia Silatolu
- Application Stage: Fees Collection
- Application Status: Document is collected
- Action Status: Approved

The main content area is divided into three tabs: 'Application', 'Process' (selected), and 'History'. Under the 'Process' tab, there is a 'Collection Of Documents' section. Below this, a 'Fees Collection' section is visible. It shows 'Assigned Officer: Accounts Officer1' and 'Assigned Date: 01 Oct 2024'. A table with columns 'Date', 'Check No / Tr. No', 'Organization', 'Receipt No', and 'Amount' is present, but it is empty with a message 'No records found'. To the right of the table is a 'Add New' form with fields for 'Organization Name', 'Cheque / DD' (with checkboxes), 'Cheque / Trans No', 'Date', 'Amount', and 'Receipt No'.

2. Click on the **"Fee Collected"** button to display the entered details in the Fees Collection grid.

### Completing the Stage:

3. After entering all mandatory fields, click on the **"Fee Collected"** button to complete this stage and move to the next step in the process.

### Canceling the Stage:

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

## Prepare Documentation:

**User: Legal Officer**

**Action Status : Approved**





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The screenshot displays the 'Legal & Other Service' module interface. At the top, there is a header bar with the title 'Legal & Other Service' and a user profile 'Welcome Lavenia Silatolu'. Below the header, a summary section shows key details: Legal Ref No. (LEGL24100100006), Lead Ref No. (LEAD24100100003), Type (Court Application), and Applied Date (01 Oct 2024). It also indicates the Entered By (Lavenia Silatolu), Application Stage (Prepare documentation), Application Status (Fees Collected), and Action Status (Approved).

The main section is titled 'Prepare Documentation'. It shows the Assigned Officer (Lavenia Silatolu) and Assigned Date (03 Oct 2024). Below this, there is a 'Document Type' dropdown menu set to 'Prepared Document \*'. A large dashed box contains an 'Upload' button and instructions: 'Drag & drop files or [Browse](#). Supported Format: .jpg, .jpeg, .png, .tiff, .gif, .doc, .pdf, .DOCX, .ppt, .csv'.

Below the upload area is a table listing documents:

Document Name	File Name	Size	Action
Prepared Document *	PRSRG0000369(1).png	0.08mb	<a href="#">Download</a> <a href="#">View</a> <a href="#">Delete</a>

At the bottom, there is a 'Notes' field with a character count '0 / 250' and a 'Document Prepared' button.

1. Click the “**Prepare Documentation**” section and “**Assigned Officer**” name and “**Assigned Date**”, “**Turnaround Time (TAT)**” will display.
2. Select the **Document Type** from the Document Type drop-down list.
3. Click **Browse** or use the drag-and-drop option to upload the document for the selected Document Type.
4. Click the **Upload** button next to the delete button.
5. Click the **Delete** button to remove the selected document.
6. Once uploaded, the document will be displayed in a grid with the following columns: **Document Name**, **File Name**, **Size**, and **Action**.
7. Click the **Download** button icon under the **Action** field to download the document.
8. Click the **Eye** button icon to view the document.
9. Click the **Delete** button icon to remove the 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 “**Document Prepared**” 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.



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### Scan Document:

User: Legal Officer

Action Status : Approved

1. Click the **Scan Document** section following fields: **Assigned Officer** name, **Assigned Date**, and **Turnaround Time (TAT)** will display.
2. Select the **Document Type** from the Document Type from drop-down list.
3. Click **Browse** or use the drag-and-drop option to upload the document for the selected Document Type.
4. Click the **Upload** button next to the delete button.
5. Click the **Delete** button to remove the selected document.
6. Once uploaded, the document will be displayed in a grid with the following columns: **Document Name**, **File Name**, **Size**, and **Action**.
7. Click the **Download** button icon under the **Action** field to download the document.
8. Click the **Eye** button icon to view the document.
9. Click the **Delete** button icon to remove the 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 **“Document Scanned”** button to complete this stage and move to the next step in the process.



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### Canceling the Stage:

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

### Verification of Fee Payment:

**User: Account Officer**

**Action Status : Approved**

1. Click the **Receipt Will Fee + Lodgement Fee** section to display the following fields: **Assigned Officer** name, **Assigned Date**, and **Turnaround Time (TAT)**. Enter or select the following details: **Organization Name**, **Check**, **DD**, **Check/Trans No**, **Date**, **Amount**, and **Receipt No**.
2. Click the **Payment Verified** button to display the entered details in the **Verification of Fee Payment** grid.

The screenshot displays the 'Legal & Other Service' module interface. The top header shows 'Legal & Other Service' and 'Welcome Accounts Officer1'. The main content area is divided into several sections:

- Legal Ref No:** LEGL24100100006
- Lead Ref No:** LEAD24100100003
- Type:** Court Application
- Applied Date:** 01 Oct 2024
- Entered By:** Lavenia Silatolu
- Application Stage:** Verification of Fee Payments
- Application Status:** Documents scanned
- Action Status:** Approved

Below this, the 'Verification of Fee Payment' section is active. It shows:

- Assigned Officer:** Accounts Officer1
- Assigned Date:** 03 Oct 2024

A table with the following columns is displayed: **Date**, **Check No / Tr. No**, **Organization**, **Receipt No**, and **Amount**. The table is currently empty, showing 'No records found' with a message: 'Try adjusting your search or filter options to find what you're looking for'.

On the right side, there is an 'Add New' section with input fields for:

- Organization Name
- Cheque DD
- Cheque / Trans No
- Date
- Amount
- Receipt No

The bottom of the interface shows a 'Notes' field and a '0 / 250' character count.

### 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 Entering all mandatory fields, click on the **"Payment Verified"** button to complete this stage and move to the next step in the process.



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### Canceling the Stage:

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

### Handover Document to the Client:

User: Legal Officer

Action Status : Approved

The screenshot displays the 'Legal & Other Service' module interface. The top navigation bar includes a 'Legal & Other Service' tab and a user profile 'Welcome Lavenia Silatolu'. The left sidebar contains icons for 'My Diary', 'My Task', 'Files', 'CRM', 'Trust', and 'Legal'. The main content area shows a table with application details:

Legal Ref No	Lead Ref No	Type	Applied Date
LEGL24100100006	LEAD24100100003	Court Application	01 Oct 2024

Below the table, the 'Application Stage' is 'Handover of the documents' and the 'Application Status' is 'Fee Payments Verified'. The 'Action Status' is 'Approved'. The 'Handover Document to the Client' section is expanded, showing the 'Assigned Officer' as 'Lavenia Silatolu' and the 'Assigned Date' as '03 Oct 2024'. A 'Notes' field is present with a character count of '0 / 250'. A 'Document Provided to the Client' button is located at the bottom right of the section.

1. Click the **Handover Document to the Client** section to display the following fields: **Assigned Officer** name, **Assigned Date**, and **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 the **Document Provided to the Client** button.



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### History:

The History tab contains the following sub-tabs:

### 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 THE DOCUMENT\*\*\*