



Fiji Public Trustee Corporation Limited Trust Module- User Manual



Trust Application Detail

User Roles: Trust Officer, Team Lead, Manager, Legal Officer, Register, Accounts Officer

Overview:

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

Ref No	Type	Stage	Application Status
TRAP2408300003	Deceased Estate	Complete Trust Creation	Trust Creation Completed
Lead Ref No	Trust Officer Assigned	Total Amount	Action Status
LEAD2408300004	Trust Officer 1	566.00	Approved

Client Information	Applicant Information	Beneficiary Information	Trust Information
Name Date Of Birth Date Of Death BRN	Name Date Of Birth Contact No Email Id	Name Date Of Birth Contact No Email Id Nomination	File No Account No Total Amount Receipt No Account Status
Ana Tiko 11 Jul 1996 9003456 ana.tiko@example.com	Mere Trustee 01 Nov 1991 9234567 - No	3456567 0 566.00 - -	

Application	Client	Applicant	Beneficiary	Settlor	Trustee
Trust Ref No TRAP2408300003	Lead Ref No LEAD2408300004	Applied By Trust Officer 1			
Trust Type Deceased Estate	Assigned Department Trust Officers	Applied Date 30 Aug 2024			
Application Status Trust Creation Completed	Assigned Officer Legal Service Officer 1	Entered By Trust Officer 1			
Action Status Approved	Applied Branch Port Vila	Entered Date 30 Aug 2024			

Application Tab:

This section contains essential information, such as Trust Information, Lead Information, and the officer who initiated the application.



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Admin

My Diary

My Task

Files

Organization

CRM

Trust

Will

Estate

Trust Application > Details

Ref No
TRAP2408300003
Lead Ref No
LEAD2408300004

Type
Deceased Estate
Trust Officer Assigned
Trust Officer 1

Stage
Complete Trust Creation
Total Amount
566.00

Application Status
Trust Creation Completed
Action Status
Approved

Date Of Birth
11 Jul 1996
Contact No
9003456
Email Id
ana.tiko@example.com

Date Of Birth
01 Nov 1991
Contact No
9234567
Email Id
-
Nomination
No

Account No
0
Total Amount
566.00
Receipt No
-
Account Status
-

Application

Client

Applicant

Beneficiary

Settlor

Trustee

Trust Ref No
TRAP2408300003

Lead Ref No
LEAD2408300004

Applied By
Trust Officer 1

Trust Type
Deceased Estate

Assigned Department
Trust Officers

Applied Date
30 Aug 2024

Application Status
Trust Creation Completed

Assigned Officer
Legal Service Officer 1

Entered By
Trust Officer 1

Action Status
Approved

Applied Branch
Port Vila

Entered Date
30 Aug 2024

- To proceed to the Client Tab, select the client from the available list.

Client Section

Admin

My Diary

My Task

Files

Organization

CRM

Trust

Will

Estate

Trust Application > Details

Ref No
TRAP2408300003
Lead Ref No
LEAD2408300004

Type
Deceased Estate
Trust Officer Assigned
Trust Officer 1

Stage
Complete Trust Creation
Total Amount
566.00

Application Status
Trust Creation Completed
Action Status
Approved

Date Of Birth
11 Jul 1996
Contact No
9003456
Email Id
ana.tiko@example.com

Date Of Birth
01 Nov 1991
Contact No
9234567
Email Id
-
Nomination
No

Account No
0
Total Amount
566.00
Receipt No
-
Account Status
-

Application

Client

Applicant

Beneficiary

Settlor

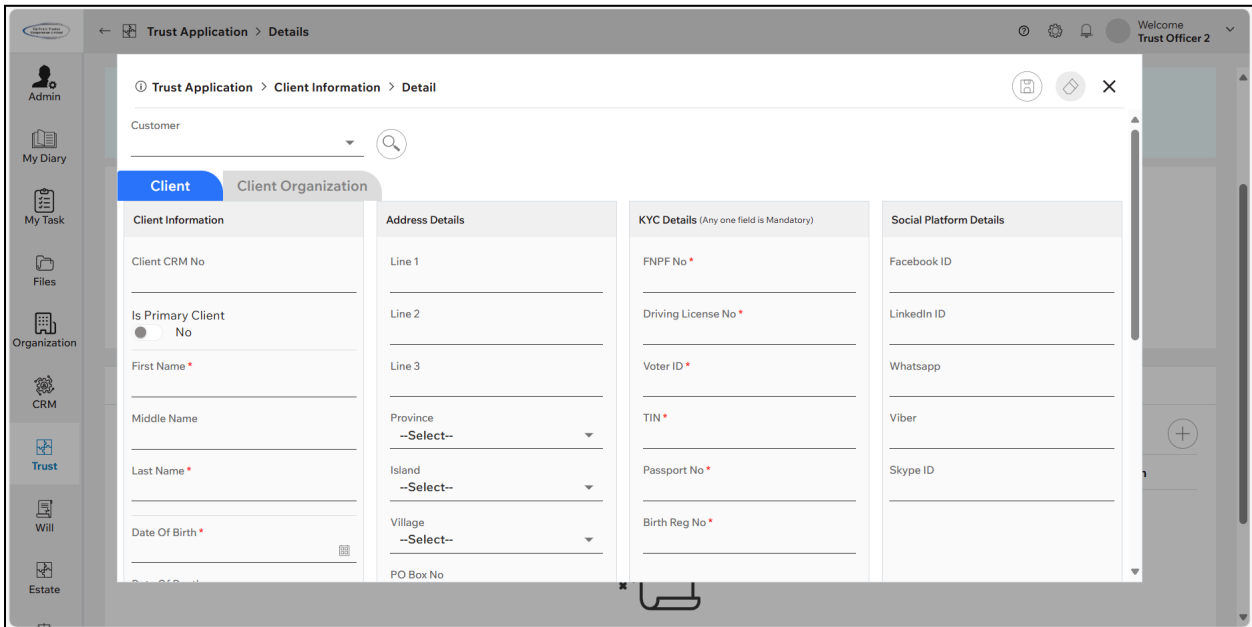
Trustee

Showing: 1 - 1 of 1 Entries | 25 | < 1 >

Client No	Gender	Date of Birth	Email ID	Contact No	Father Name	Mother Name	Is Primary Client	Action
CUST2408300006 Josua Naliva	Female	08 Feb 2002	josua.naliva@example.com	9002345			No	

Adding a Client:

1. Click the **Add** button to enter client details.



The screenshot shows a web application interface for 'Trust Application > Details'. The main content area is titled 'Trust Application > Client Information > Detail'. It features a 'Customer' dropdown menu with a search icon. Below this, there are four tabs: 'Client' (selected), 'Client Organization', and two others. The 'Client' tab is divided into four sections: 'Client Information', 'Address Details', 'KYC Details (Any one field is Mandatory)', and 'Social Platform Details'. The 'Client Information' section includes fields for 'Client CRM No', 'Is Primary Client' (a toggle switch set to 'No'), 'First Name *', 'Middle Name', 'Last Name *', and 'Date Of Birth *'. The 'Address Details' section includes 'Line 1', 'Line 2', 'Line 3', 'Province --Select--', 'Island --Select--', 'Village --Select--', and 'PO Box No'. The 'KYC Details' section includes 'FNPF No *', 'Driving License No *', 'Voter ID *', 'TIN *', 'Passport No *', and 'Birth Reg No *'. The 'Social Platform Details' section includes 'Facebook ID', 'LinkedIn ID', 'Whatsapp', 'Viber', and 'Skype ID'. A sidebar on the left contains navigation links for 'Admin', 'My Diary', 'My Task', 'Files', 'Organization', 'CRM', 'Trust', 'Will', and 'Estate'. The top right corner shows a user profile for 'Welcome Trust Officer 2'.

2. A **Client Information 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 client details.

Client Organization:

4. Navigate to the **Client Organization** tab to add organization-related information.



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Trust Application > Details

Trust Application > Client Information > Detail

Customer

Client Client Organization

Organization Name	Settled Amount	Nominee Name	Nominee DOB
	0		

5. Click the **Add** button and input the following details: Organization Name, Settlement Amount, Nominee Name, Nominee Date of Birth (DOB).
6. Click the **Save** button to save the Client and Client Organization details.
7. Click the **Clear** button to erase the entered or selected details.
8. Click the **Close** button to exit the popup window.



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Applicant Section

The screenshot shows the 'Trust Application > Details' page. The top section displays application metadata: Ref No (TRAP2407090006), Type (FNPF), Stage (Obtain Document From Client), and Application Status (Obtaining Client Documents). Below this, a table lists application details with columns: Application, Client, Applicant, Beneficiary, Settlor, and Trustee. The 'Applicant' tab is selected, showing a table with columns: Applicant No, Gender, Date of Birth, Email ID, Contact No, Is Primary Applicant, and Action. The table is currently empty, displaying a 'No records found' message.

- Select the applicant to navigate to the **Applicant Tab**.

Adding an Applicant:

1. Click the **Add** button to input applicant details.

The screenshot shows the 'Trust Application > Applicant Information > Detail' form. The form is divided into four main sections: Applicant Information, Address Details, KYC Details, and Social Platform Details. The 'Applicant Information' section includes fields for Applicant CRM No, Is Primary Applicant (radio buttons), First Name, Middle Name, Last Name, and Date Of Birth. The 'Address Details' section includes fields for Line 1, Line 2, Line 3, Province, Island, Village, and PO Box No. The 'KYC Details' section includes fields for FNPF No, Driving License No, Voter ID, TIN, Passport No, and Birth Reg No. The 'Social Platform Details' section includes fields for Facebook ID, LinkedIn ID, Whatsapp, Viber, and Skype ID.



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2. An **Applicant Information Details** popup will appear.
3. Choose the customer from the **Customer Drop-down List**, search for an existing customer, or enter new client details.
4. If the applicant is the primary client, select the **Yes** radio button.

Applicant Additional Information:

5. Navigate to the **Applicant Additional Information** tab to input further details.

The screenshot displays the 'Trust Application > Details' interface. On the left is a sidebar with navigation icons for Admin, My Diary, My Task, Files, Organization, CRM, Trust (highlighted), Will, and Estate. The main content area shows the 'Trust Application > Applicant Information > Detail' path. Below this, there's a 'Customer' dropdown menu with 'Timoci Baleinabuli' selected. Two tabs are visible: 'Applicant' and 'Applicant Additional Information' (which is active and highlighted in blue). Under the active tab, there are three input fields: 'Children Name' (with a clear 'x' button), 'Date Of Birth' (with a calendar icon), and 'Gender' (a dropdown menu showing '--Select--' and a red delete icon). A '+' button is located to the right of the Gender field. The top right corner of the window shows a 'Welcome Trust Officer 2' notification.

6. Click the **Add** button and provide information such as: Children's Names, Date of Birth, Gender.
7. Click the **Save** button to save both the Applicant and Applicant Additional Information.
8. Click the **Clear** button to erase entered or selected details.
9. Click the **Close** button to close the popup window.

Beneficiary Section

- Select the beneficiary to proceed to the **Beneficiary Tab**.



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The screenshot shows the 'Trust Application > Details' page. The breadcrumb trail is 'Trust Application > Applicant Information > Detail'. The 'Customer' dropdown is set to 'Timoci Baleinabuli'. The 'Applicant' tab is active, and the 'Applicant Additional Information' sub-tab is selected. The form contains fields for 'Children Name', 'Date Of Birth', and 'Gender'. The 'Children Name' field has a red 'x' icon, and the 'Gender' field has a red trash icon. A '+' icon is visible on the right side of the form.

Adding a Beneficiary:

1. Click the **Add** button to enter beneficiary details.

The screenshot shows the 'Beneficiary Information Details' popup form. The breadcrumb trail is 'Trust Application > Beneficiary Information > Detail'. The 'Customer' dropdown is set to 'Timoci Baleinabuli'. The form is divided into four sections: 'Beneficiary Information', 'Address Details', 'KYC Details (Any one field is Mandatory)', and 'Social Platform Details'. The 'Beneficiary Information' section includes fields for 'Beneficiary CRM No', 'Is Minor' (radio button), 'Relationship' (dropdown), 'First Name', 'Middle Name', 'Last Name', and 'Date Of Birth'. The 'Address Details' section includes fields for 'Line 1', 'Line 2', 'Line 3', 'Province', 'Island', 'Village', and 'PO Box No'. The 'KYC Details' section includes fields for 'FNPF No', 'Driving License No', 'Voter ID', 'TIN', 'Passport No', and 'Birth Reg No'. The 'Social Platform Details' section includes fields for 'Facebook ID', 'LinkedIn ID', 'Whatsapp', 'Viber', and 'Skype ID'.

2. A **Beneficiary Information Details** popup will appear.



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3. Choose the customer from the **Customer Drop-down List**, search for an existing customer, or enter new client details.
4. If the beneficiary is a minor, select **Yes** for the **Is Minor** option and add the guardian's details from the **Guardian Customer** drop-down list.
5. Click the **Save** button to save Beneficiary Information.
6. Click the **Clear** button to remove the entered or selected details.
7. Click the **Close** button to exit the popup window.

Settlor Section

- Select the Settlor to navigate to the **Settlor Tab**.

Trust Application > Details

Ref No: TRAP24070900006
Lead Ref No: LEAD24070900001

Type: FNPF
Trust Officer Assigned: Trust Officer 2

Stage: Obtain Document From Client
Total Amount: 0.00

Application Status: Obtaining Client Documents
Action Status: Approved

Date Of Birth: -
Date Of Death: -
BRN: -

Account No: 21321
Total Amount: 0.00
Receipt No: -
Account Status: Active

Application | Client | Applicant | Beneficiary | **Settlor** | Trustee

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

Settlor No	Settlor Name	Gender	Date Of Birth	Email ID	Contact No	Is FPTCL	Action
------------	--------------	--------	---------------	----------	------------	----------	--------

Adding a Settlor:

1. Click the **Add** button to input Settlor details.



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2. A **Settlor Information Details** popup will appear.
3. Choose the customer from the **Customer Drop-down List**, search for an existing customer, or enter new Settlor details.
4. If the Settlor is an FPTCL, select **Yes** in the **Is FPTCL** field.
5. Click the **Save** button to save Settlor Information.
6. Click the **Clear** button to erase the entered or selected details.
7. Click the **Close** button to exit the popup window.

Trustee Section

- Select the Trustee to navigate to the **Trustee Tab**.



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Ref No	Type	Stage	Application Status
TRAP24070900006	FNPF	Obtain Document From Client	Obtaining Client Documents
Lead Ref No	Trust Officer Assigned	Total Amount	Action Status
LEAD24070900001	Trust Officer 2	0.00	Approved

Date Of Birth	Date Of Birth	Date Of Birth	Account No
-	-	-	21321
Date Of Death	Contact No	Contact No	Total Amount
-	-	-	0.00
BRN	Email Id	Email Id	Receipt No
-	-	-	-
	Nomination	Nomination	Account Status
	No	No	Active

Application	Client	Applicant	Beneficiary	Settlor	Trustee	
Showing: 0 - 0 of 0 Entries 25 < > (+)						
Trustee No	Gender	Date Of Birth	Email ID	Contact No	Is FPTCL	Action
Trustee Name						

Adding a Trustee:

1. Click the **Add** button to input Trustee details.

Trust Application > Trustee Information > Detail

Customer

Trustee Information	Address Details	KYC Details (Any one field is Mandatory)	Social Platform Details
Trustee CRM No	Line 1	FNPF No *	Facebook ID
Is FPTCL	Line 2	Driving License No *	LinkedIn ID
<input type="checkbox"/> No	Line 3	Voter ID *	Whatsapp
First Name *	Province	TIN *	Viber
Middle Name	--Select--	Passport No *	Skype ID
Last Name *	Island	Birth Reg No *	
Date Of Birth *	--Select--		
Date Of Death	Village		
	--Select--		
	PO Box No		

2. A **Trustee Information Details** popup will appear.



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3. Choose the customer from the **Customer Drop-down List**, search for an existing customer, or enter new Trustee details.
4. If the Trustee is an FPTCL, select **Yes** in the **Is FPTCL** field.
5. Click the **Save** button to save Trustee Information.
6. Click the **Clear** button to remove the entered or selected details.
7. Click the **Close** button to close the popup window.

Process Tab:

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

Client Document

User: Trust Officer

Objective: Submit and manage the required documents to complete this step.

The screenshot displays the 'Trust Application > Details' page. The top section shows application metadata: Ref No (TRAP24082700002), Type (FNPF), Stage (Complete Trust Creation), and Application Status (Trust Creation Completed). Below this, the 'Process' tab is active, showing 'Client Document' details. A table lists linked documents with columns for Document Name, File Name, Size, and Action. The table contains four entries: Birth Certificate of the Beneficiary, Death Certificate of the deceased, Legal FNPF Instruction Memo (1), and Photo ID. A sidebar on the left contains navigation icons for Admin, My Diary, My Task, Files, Organization, CRM, Trust, Will, Estate, and Legal. The bottom of the page shows a 'Notes' section with 'stage 1' and a page indicator '7 / 250'.

Document Name	File Name	Size	Action
Birth Certificate of the Beneficiary confirming that the Beneficiary is the deceased's child *	Legal FNPF Instruction Memo (1).doc	0.00mb	↓ ⌕
Death Certificate of the deceased *	Legal FNPF Instruction Memo (1) (1).doc	0.00mb	↓ ⌕
Legal FNPF Instruction Memo *	Legal FNPF Instruction Memo (1) (2).doc	0.00mb	↓ ⌕
Photo ID *	Legal FNPF Instruction Memo (1) (3).doc	0.00mb	↓ ⌕

Linked Documents:

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

Details:

1. The tab shows key information, including the **Assigned Officer**, **Assigned Date**, and the **Turnaround Time (TAT)** for processing.



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2. Choose the type of document from the **Document Type** drop-down list.
3. Click on the **Browse** button and select the desired file from your local system.
4. The selected document will appear below the browse field.
5. Click the **Upload** icon to add the document to the document grid.
6. 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.
7. Enter the Notes in notes tab and Click **save** button below the Notes Field to save the entered notes.

Completing the Stage:

- After uploading all mandatory documents, click on the **Initial Document Received** 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 stag

Court Order

Linked Documents:

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

Detail:

The screenshot displays the 'Trust Application > Details' page. The top navigation bar includes a user profile icon, a search icon, a settings icon, a notification bell, and a 'Welcome Trust Officer 2' message. The left sidebar contains icons for Admin, My Diary, My Task, Files, Organization, CRM, Trust, Will, and Estate.

The main content area shows application details:

Ref No	Type	Stage	Application Status
TRAP24070900006	FNPF	Obtain Court Order	Obtaining Court Order

Lead Ref No	Trust Officer Assigned	Total Amount	Action Status
LEAD24070900001	Trust Team Lead Officer1	0.00	Verification 1

Below the details are tabs for 'Application', 'Process' (selected), and 'History'. Under the 'Process' tab, there is a 'Client Document' section with a dropdown arrow. Below that is a 'Court Order' section with a dropdown arrow. The 'Court Order' section is expanded, showing a 'Detail' tab and a 'Linked Document' table.

Assigned Officer	Assigned Date	TAT
Trust Team Lead Officer1	09 Sep 2024	0 Days

Designation	User Name	Verified Date	Action
Supervisor	Trust Team Lead Officer1	09 Sep 2024	



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1. Once client documents are collected, the **Court Order** step will be triggered for **FNPF** and **Death Benefit Trust** applications.
2. Initially, the court order task will be assigned to the **Trust Team Lead**

Adding Court Order Notes:

The screenshot displays the 'Trust Application > Details' interface. A 'Detail' tab is active, showing application information. A 'Linked Document' section is visible. A 'Trust Application > Detail > Add Notes' popup is open, featuring dropdowns for 'Action Status' (set to 'Approved') and 'Application Status' (set to 'Complete Trust Creation'), and a text area for 'Notes' (0 / 250). The background application details include Ref No TRAP24082700002, Type FNPF, Stage Complete Trust Creation, Application Status Trust Creation Completed, Lead Ref No LEAD24082700005, Trust Officer Assigned Trust Officer 2, and Total Amount 0.00. The Action Status is 'Approved'.

3. Click the **Add** button in the **Action** column to open the **Trust Application > Detail > Add Notes** popup.
4. In the popup, select the **Action Status** and enter relevant notes.
5. Click the **Save** button to store the notes.

Status Flow:

User: Trust Team Lead Officer

- Change the status from **Verification 1** to **Verification 2**.

User: Manager

- Change the status from **Verification 2** to **Approved**.

User: Legal Officer

- Upload the court order copy.
- Complete the stage by clicking on Court Order Obtained.



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Open File

User: Registry Clerk

Trust Application > Details

Ref No: TRAP24082700002
Type: FNPF
Stage: Complete Trust Creation
Application Status: Trust Creation Completed
Lead Ref No: LEAD24082700005
Trust Officer Assigned: Trust Officer 2
Total Amount: 0.00
Action Status: Approved

Application | **Process** | History

Client Document

Court Order

Open File

Assigned Officer: Trust Officer 2
Assigned Date: 27 Aug 2024
TAT: 0 Days
File Number: 33/256
File Type: Trust
File Name: shaji33256
Customer Name: Boopathi G
Status: Active
Is Physical: ☒

Notes: created

This tab displays important details about the file, including: Assigned Officer, Assigned Date, TAT (Turnaround Time), File Number, File Type, File Name, Customer Name, Is Physical (indicates if the file is maintained physically).

Adding a New File Details:

1. Click the **Add** button to enter the details of a newly created file.
2. Fill in the following fields: File Number, File Type, File Name.
3. Select the **Customer Name** from the drop-down list.
4. If the file is physically maintained, check the **Is Physical** checkbox.
5. Click the **Save** button to store the entered information.
6. Click the **Clear** button to reset all entered values.

Adding Notes:

7. Navigate to the **Notes** tab.
8. Enter the relevant notes in the **Notes** field.
9. Click the **Save** button below the notes field to store the entered notes.



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Completing the Stage:

- Click the **File Opened** button to complete this stage and move to the next step.

Canceling the Stage:

- Click the **Cancel** button to stop the process and cancel the current stage.

Register Trust

User: Register Officer

Trust Application > Details

Ref No: TRAP24082700002
Lead Ref No: LEAD24082700005
Type: FNPF
Trust Officer Assigned: Trust Officer 2
Stage: Complete Trust Creation
Total Amount: 0.00
Application Status: Trust Creation Completed
Action Status: Approved

Application | **Process** | History

Client Document
Court Order
Open File
Register Trust

Assigned Officer: Trust Officer 2
Assigned Date: 27 Aug 2024
TAT: 0 Days
File Name: shaji33256
File Type: Trust
Trust Ref No: TREG24082700001

Notes: trust register

Conduct Interview

1. This tab displays important details including: **Assigned Officer, Assigned Date, TAT (Turnaround Time), File Name, File Type**
2. The **Trust Ref No** will be auto-populated once the Register Officer clicks the **Save** button.

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:

- Click the **Trust Registered** button to complete this stage and proceed to the next step.



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Canceling the Stage:

- Click the **Cancel** button to terminate the process and cancel the current stage.\

Trust Account

This tab displays important details about the file, including: Assigned Officer, Assigned Date, TAT (Turnaround Time). This Step will display only if the Trustee is FPTCL.

The screenshot shows the 'Trust Application > Details' page. The 'Trust Account' tab is selected, displaying the following information:

Ref No	Type	Stage	Application Status
TRAP24091800002	Accident Compensation	Complete Trust Creation	Trust Creation Completed
Lead Ref No	Trust Officer Assigned	Total Amount	Action Status
LEAD24091800004	Trust Officer 4	0.00	Approved

Buttons: Open File, Register Trust

Assigned Officer: Trust Officer 4
Assigned Date: 18 Sep 2024
TAT: 0 Days

Beneficiary Name	Account No	Account Type	Bank	Branch	Status	Action
Adi Tabakauco	55776	Cash	Bank of Baroda	Dominion, Suva	Active	[Edit]
Adi Tabakauco	667767	Common	Bank of Hawaii ANZ	Ba	Active	[Edit]
Adi Tabakauco	888878	Non-Cash	Bank of Baroda	ANZ House	Active	[Edit]

Showing: 1 - 3 of 3 Entries | 25 | 1 >

Notes: Account created

1. Click On Add button To **Trust Account>Add New** Popup.
2. Enter the details such as Account No, Account Type, Customer Name, Bank Name, Branch Name and Status.
3. Click save button to save the details and Display in the Grid.
4. Click on Clear button to Clear the details.
5. Click on Close Icon to Close the Popup.
6. Enter the Notes in notes tab and Click **save** button below the Notes Field to save the entered notes.

Completing the Stage:

- Click the **Creating Trust Account** button to complete this stage and proceed to the next step.

Canceling the Stage:

- Click the **Cancel** button to terminate the process and cancel the current stage.



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Receipt Fund

This tab displays important details about the file, including: Assigned Officer, Assigned Date, TAT (Turnaround Time). This Step will display only if the Trustee is FPTCL.

The screenshot shows the 'Trust Application > Details' page. The top section displays application information: Ref No (TRAP24091800002), Lead Ref No (LEAD24091800004), Type (Accident Compensation), Trust Officer Assigned (Trust Officer 4), Stage (Complete Trust Creation), Total Amount (0.00), Application Status (Trust Creation Completed), and Action Status (Approved). Below this, the 'Receipt Fund' tab is active, showing Assigned Officer (Trust Officer 4), Assigned Date (18 Sep 2024), and TAT (0 Days). A table with columns Date, Check No / Tr. No, Organization, Receipt No, and Amount is shown, but it contains no records. A message states 'No records found' and suggests adjusting search or filter options. On the right, there is an 'Add New' form with fields for Organization Name, Cheque / DD, Cheque / Trans No, Date, Amount, and Receipt No. The bottom of the page has a 'Conduct Interview' button.

1. Enter Organization Name, Cheque / Trans no, Date, Amount and Receipt no.
2. Once all the details are filled Click on **Fund Receipt Collected** to complete this stage and proceed to the next step.
3. Click the **Cancel** button to terminate the process and cancel the current stage.

Conduct Interview

User: Trust Officer



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Trust Application > Details

Ref No: TRAP24082700002
Lead Ref No: LEAD24082700005
Type: FNPF
Trust Officer Assigned: Trust Officer 2
Stage: Complete Trust Creation
Total Amount: 0.00
Application Status: Trust Creation Completed
Action Status: Approved

Register Trust

Conduct Interview

Detail Linked Document

Assigned Officer: Trust Officer 2
Assigned Date: 27 Aug 2024
TAT: 0 Days

Document Type

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

Upload

Document Name	File Name	Size	Action
Beneficiary Gaurdian Information Sheet *	Legal FNPF Instruction Memo (1)(5).doc	0.00mb	Download View
Checklist For Execution *	Legal FNPF Instruction Memo (1)(6).doc	0.00mb	Download View

Notes *
c

1 / 250

Linked Documents:

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

Detail:

1. This tab displays important details including: **Assigned Officer, Assigned Date, TAT (Turnaround Time)**.
2. Choose the type of document from the **Document Type** drop-down list.
3. Click on the **Browse** button and select the desired file from your local system.
4. The selected document will appear below the browse field.
5. Click the **Upload** icon to add the document to the document grid.
6. 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.
7. Enter the Notes in notes tab and Click **save** button below the Notes Field to save the entered notes.

Completing the Stage:

- Click the **Conducted Interview** button to complete this stage and proceed to the next step.

Canceling the Stage:

- Click the **Cancel** button to terminate the process and cancel the current stage.



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Finalize Trust Deed

The screenshot displays the 'Trust Application > Details' page. At the top, a summary bar shows: Ref No TRAP24082700002, Type FNPF, Stage Complete Trust Creation, Application Status Trust Creation Completed, and Action Status Approved. Below this is a task list with 'Register Trust', 'Conduct Interview', and 'Finalize Trust Deed' (which is expanded). The 'Finalize Trust Deed' section includes a 'Detail' tab and a table of assigned officers. The table has columns for Designation, User Name, Verified Date, and Action. It lists a Supervisor (Trust Team Lead Officer) and a General Manager (Manager Estate Trust Officer), both verified on 27 Aug 2024. Below the table is a 'Notes' field with a character count of 0 / 250.

Designation	User Name	Verified Date	Action
Supervisor	Trust Team Lead Officer	27 Aug 2024	
General Manager	Manager Estate Trust Officer	27 Aug 2024	

Detail:

1. This tab displays important details including: Assigned Officer, Assigned Date, TAT (Turnaround Time).
2. Click the **Add** button in the **Action** column to open the **Trust Application > Detail > Add Notes** popup.
3. In the popup, select the **Action Status** and enter relevant notes.
4. Click the **Save** button to store the notes.

Adding Notes:

5. Navigate to the **Notes** tab.
6. Enter the relevant notes in the **Notes** field.
7. Click the **Save** button below the notes field to store the entered notes.

Status Flow:

User: Trust Team Lead Officer

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

User: Manager

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



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User: Legal Officer

- Complete the stage by clicking on **Finalized Trust Deed**.

Complete Trust Creation

User: Trust Officer

The screenshot displays the 'Trust Application > Details' page. The top section shows application details: Ref No TRAP24082700002, Type FNPF, Stage Complete Trust Creation, and Application Status Trust Creation Completed. Below this, there is a list of tasks: Register Trust, Conduct Interview, Finalize Trust Deed, and Complete Trust Creation. The 'Complete Trust Creation' task is highlighted. Below the tasks, it shows Assigned Officer Trust Officer 2, Assigned Date 27 Aug 2024, and TAT 0 Days. There is a Notes field with the text 'created' and a Summary section at the bottom.

1. This tab displays important details including: Assigned Officer, Assigned Date, TAT (Turnaround Time).
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 **Completed Trust Creation**.

Summary

User: Trust Officer



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The screenshot displays the 'Trust Application > Details' page. The top section shows application metadata: Ref No (TRAP24082700002), Type (FNPF), Stage (Complete Trust Creation), Application Status (Trust Creation Completed), Lead Ref No (LEAD24082700005), Trust Officer Assigned (Trust Officer 2), Total Amount (0.00), and Action Status (Approved). Below this is a task list with steps: Register Trust, Conduct Interview, Finalize Trust Deed, and Complete Trust Creation. The 'Summary' section provides key details: Assigned Officer (Trust Officer 2), Assigned Date (27 Aug 2024), TAT (0 Days), Trust Ac No, File No (33/256), Creation Date (27 Aug 2024), Beneficiary Name, and Closure Date (27 Aug 2024). A 'Generate Statement' button is located at the bottom right of the summary section. The left sidebar contains navigation links for Admin, My Diary, My Task, Files, Organization, CRM, Trust, Will, Estate, Legal, and Finance.

Ref No	Type	Stage	Application Status
TRAP24082700002	FNPF	Complete Trust Creation	Trust Creation Completed

Lead Ref No	Trust Officer Assigned	Total Amount	Action Status
LEAD24082700005	Trust Officer 2	0.00	Approved

Task List:

- Register Trust
- Conduct Interview
- Finalize Trust Deed
- Complete Trust Creation

Summary:

Assigned Officer	Assigned Date	TAT
Trust Officer 2	27 Aug 2024	0 Days

Trust Ac No	File No	Creation Date
-	33/256	27 Aug 2024

Beneficiary Name	Closure Date
-	27 Aug 2024

[Generate Statement](#)

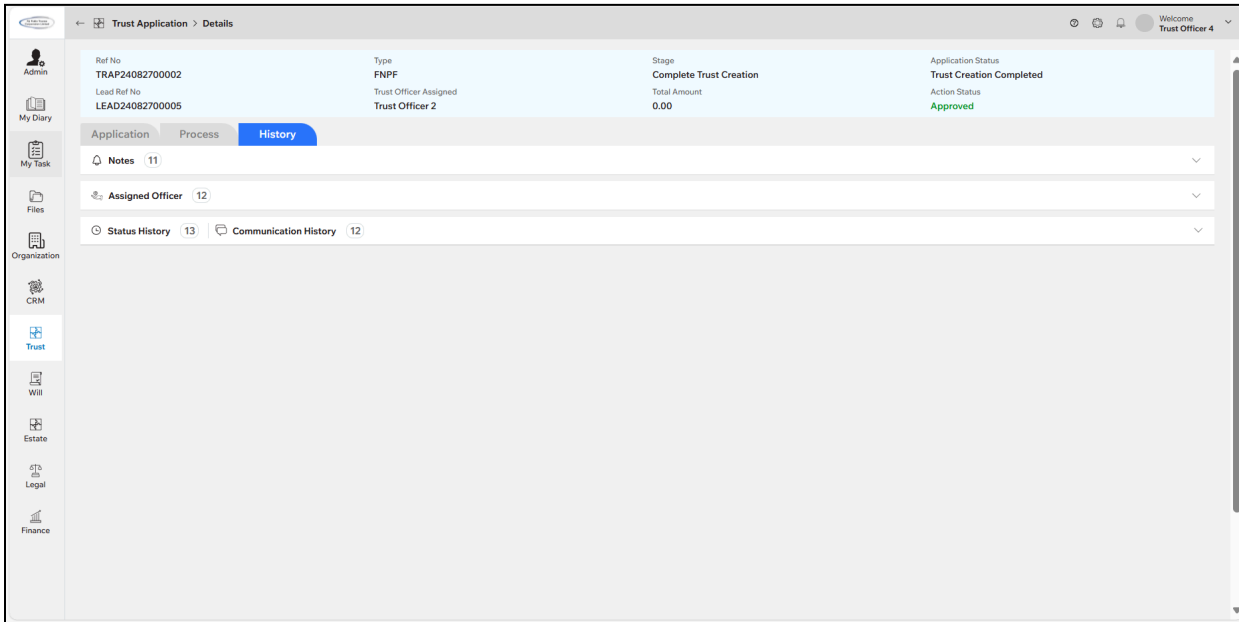
1. This tab displays the following details: Assigned Officer, Assigned Date, TAT (Turnaround Time), Trust Account Number, Beneficiary Name, File Number, Closure Date, Creation Date.
2. Click the **Generate Statement** button to download the Trust Application in PDF format.

History:

- The History tab contains the following sub-tabs:



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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.



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