



Fiji Public Trustee Corporation Limited CRM Module- User Manual



File

User : Trust Officer, Estate Officer, Met,TI,Accounts officer

This screen helps to Search and View the Accounts. To navigate to this screen click on the **Files** from the menu and click **File**.

File No	File Name	File Type	Created Date	Ref No	Status
565656565	dfdfgdgdf	Trust	03 Sep 2024	TRAP24090300003	Active
TRAP0091	LaisaFile01	Trust	03 Sep 2024	TRAP24090300002	Active
3456567	rthgj	Trust	30 Aug 2024	TRAP24083000003	Active
TRAP24083000001	TRAP24083000001	Trust	30 Aug 2024	TRAP24083000001	Active
TRAP24083000002	TRAP24083000002	Trust	30 Aug 2024	TRAP24083000002	Active
TRAP24082900	TRAP24082900	Trust	29 Aug 2024	TRAP24082900003	Active
35545645	Trust	Trust	29 Aug 2024	TRAP24082900002	Active
TRAP240829	TRAP240829	Trust	29 Aug 2024	TRAP24082900001	Active
TRAP24082800002	TRAP24082800002	Trust	29 Aug 2024	TRAP24082800002	Active
57-8	huy767	Common	28 Aug 2024	TRAP24081400001	Active
4657jh-89/8	gg67-87	Trust	28 Aug 2024	TRAP24082700003	Active
20240877	TR202412	Trust	28 Aug 2024	TRAP24082800001	Active
33/256	shajj33256	Trust	27 Aug 2024	TRAP24082700002	Active
gh-878/887	ggv	Trust	26 Aug 2024	TRAP24082600002	Active
432543	455	Estate	22 Aug 2024	TRAP24082200002	Active
r56-7777	fgt		14 Aug 2024	TRAP24081400002	Active
sdwde23	fg54		14 Aug 2024	TRAP24081300004	Active
873/928323	H-8378	Trust	13 Aug 2024	TRAP24081300011	Active

Search Criteria

1. Click **Search** button, **File Search** pop up will be displayed, wherein the user can search based on the given parameters.



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Files

File Search

File No: All, File Name: , File Type: All, Customer: All, Ref No: , Date (From): , Date (To): , Status: All

File No	File Name	File Type	Date (From)	Date (To)	Status
4657jh-89/8	gg67-87	Trust	28 Aug 2024		Active
20240877	TR202412	Trust	28 Aug 2024		Active
33/256	shaj33256	Trust	27 Aug 2024		Active
gh-878/887	ggv	Trust	26 Aug 2024		Active
432543	455	Estate	22 Aug 2024		Active
r56-77/7	fgt		14 Aug 2024		Active
sdwde23	fg54		14 Aug 2024		Active
873/928323	H-8378	Trust	13 Aug 2024		Active

2. Enter/Select any of the fields among File No , File Name , File Type , Customer , Ref No , Date (From) , Date (To) , Status.

Files

File Search

File No: All, File Name: , File Type: Trust, Customer: All, Ref No: , Date (From): , Date (To): , Status: Active

File No	File Name	File Type	Date (From)	Date (To)	Status
4657jh-89/8	gg67-87	Trust	28 Aug 2024		Active
20240877	TR202412	Trust	28 Aug 2024		Active
33/256	shaj33256	Trust	27 Aug 2024		Active
gh-878/887	ggv	Trust	26 Aug 2024		Active
432543	455	Estate	22 Aug 2024		Active
r56-77/7	fgt		14 Aug 2024		Active
sdwde23	fg54		14 Aug 2024		Active
873/928323	H-8378	Trust	13 Aug 2024		Active

3. Click the **Search** icon on top of the pop up to get corresponding results.



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TRAP0091	LaisaFile01	Trust	03 Sep 2024	TRAP24090300002	Active
3456567	rthgj	Trust	30 Aug 2024	TRAP24083000003	Active
TRAP24083000001	TRAP24083000001	Trust	30 Aug 2024	TRAP24083000001	Active
TRAP24083000002	TRAP24083000002	Trust	30 Aug 2024	TRAP24083000002	Active
TRAP24082900	TRAP24082900	Trust	29 Aug 2024	TRAP24082900003	Active
35545645	Trust	Trust	29 Aug 2024	TRAP24082900002	Active
TRAP240829	TRAP240829	Trust	29 Aug 2024	TRAP24082900001	Active
TRAP24082800002	TRAP24082800002	Trust	29 Aug 2024	TRAP24082800002	Active
57-8	huy767	Common	28 Aug 2024	TRAP24081400001	Active
4657jh-89/8	gg67-87	Trust	28 Aug 2024	TRAP24082700003	Active
20240877	TR202412	Trust	28 Aug 2024	TRAP24082800001	Active
33/256	shajj33256	Trust	27 Aug 2024	TRAP24082700002	Active
gh-878/887	ggv	Trust	26 Aug 2024	TRAP24082600002	Active
432543	455	Estate	22 Aug 2024	TRAP24082200002	Active
r56-77/7	fgt		14 Aug 2024	TRAP24081400002	Active
sdwde23	fg54		14 Aug 2024	TRAP24081300004	Active
873/928323	H-8378	Trust	13 Aug 2024	TRAP24081300011	Active

4. Click the **Clear** icon next to the search icon to clear all the entered values in the fields.

Customer > Add New

Common Information

First Name *
Arjun

Middle Name
Kumar

Last Name *
Singh

Email ID
arjun.singh001@example.ci

Contact Number *
9876543210

Alternate Contact Number
9876543211

Contact Person Information

Father Name
Rajesh Singh

Mother Name
Sunita Singh

Guardian Name

Student Id *
STU001234

School Name *
Delhi Public School

Employer Information

Employer Name
Fiji Airways

Net Salary(FJD)
850000

Occupation
Pilot

Line 1 *
23 Aviators Lane

Line 2
Airport Road

Line 3
West Terminal

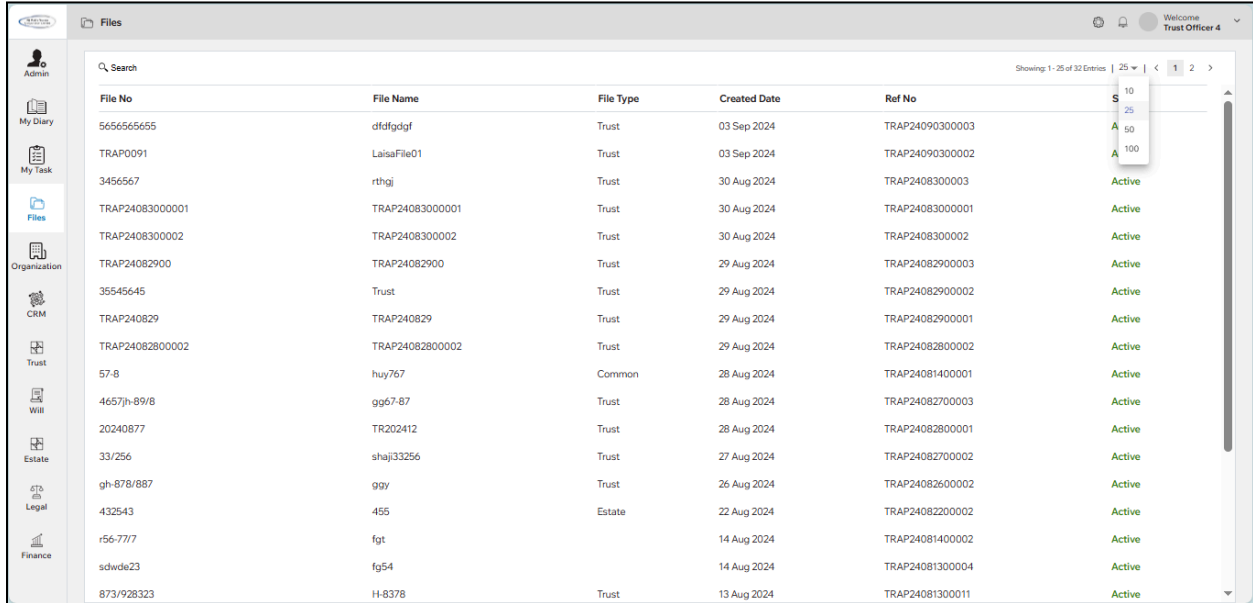
Save

CUST2408200004 James robert Male 20 Aug 1995 6548484648 Qualified

5. Click the Clear icon next to the search icon to clear all the entered values in the fields.
6. Click the Close button to exit the search panel.
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.



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TRAP24083000001	TRAP24083000001	Trust	30 Aug 2024	TRAP24083000001	Active
TRAP24083000002	TRAP24083000002	Trust	30 Aug 2024	TRAP24083000002	Active
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TRAP240829	TRAP240829	Trust	29 Aug 2024	TRAP24082900001	Active
TRAP24082800002	TRAP24082800002	Trust	29 Aug 2024	TRAP24082800002	Active
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33/256	shajj33256	Trust	27 Aug 2024	TRAP24082700002	Active
gh-878/887	ggv	Trust	26 Aug 2024	TRAP24082600002	Active
432543	455	Estate	22 Aug 2024	TRAP24082200002	Active
r56-777	fgt		14 Aug 2024	TRAP24081400002	Active
schde23	fg54		14 Aug 2024	TRAP24081300004	Active
873/928323	H-8378	Trust	13 Aug 2024	TRAP24081300011	Active

10. Select the Records count on the top right corner to show the required number of records per page.

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