



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



### Customer Update Detail

#### User : Customer Creation Officer

This screen allows the Customer Update Officer to view and modify the details of customers that have already been added in the customer screen.

1. To edit the additional information, click the Edit button in the Customer , Employer, Additional Information panel.

The screenshot displays the 'Customer Update > Details' interface. At the top, it shows the 'Student ID' as STU0012345 and the 'Date Of Death' as 21-11-1991. Below this, there are several panels for additional information:

- Residential Address:** 23 Garden Grove Orchard Hill East Field, Natadola Pele Malampa - 4040.
- Permanent Address:** 23 Garden Grove Orchard Hill East Field, Natadola Pele Malampa - 4040.
- KYC Details:** Includes fields for FNPf No (FNPF00...), Voter ID (VOTER5...), TIN (TIN543210), Driv Lic No (DL56789...), National ID (NID4455...), Passport No (P567890...), and Birth Reg No (BRN567...). Each field has a small document icon next to it.
- Social Platform Details:** Includes fields for Facebook (John@123), LinkedIn (linkedin.com/in/user005), WhatsApp (7981234505), Telegram (7981234505), and Skype (Skp6357813).
- Customer Type:** Includes checkboxes for Person (checked), Settlor, Trustee, Applicant, Beneficiary, Client, Gaurdian, and Customer.

An 'Edit' button is located below the KYC Details panel. At the bottom, there is a 'Bank Information' tab with a notification icon (1).

2. After making the necessary changes, click the **Save** button to update the details.
3. Click the **Refresh** button to restore the previous values.
4. Click the **Open** button below the bank information tab to navigate the customer update details view bank popup.



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



Customer Update > Details

Passport No P567890...  
Birth Reg No BRN567...

Skp6357813

**Bank Information** 1

Bank Name	Bank Code	Account Number	IFSC Code	Effective Date	Status
ICICI	icici324651	23456789012345ACC	STAR000567866	21 Aug 2024	Active

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

Assigned Officer 1

Document 4

Communication History 1

Notes 0 Status History 1

5. Click the **Edit** button to edit the bank information tab.

Customer Update > Details > View Bank

**Bank Information**

Bank Name  
ICICI

Bank Code  
icici324651

Branch  
Branch Office

Swift Code  
GTBKINBB32

IFSC Code  
STAR000567866

Head Office Bank 0981,Continental Trust Bank

**Additional Information**

Account No  
23456789012345ACC

Effective Date  
21 Aug 2024

Account Status  
Active

**Bank Address**

Line 1 456 Galaxy  
cvb

Line 2 Victory Town  
cvb

Line 3 Starville ST 67890  
cvb

Province Malampa  
Penama

Island Pele  
Emau

Village Natadola  
-

PO Box No 32564  
-

**Edit**

Notes 0 Status History 1

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



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



Customer Update > Details

Customer Update > Details > Edit Bank

Bank Information

Bank Name \*  
ICICI

Bank Code  
icici324651

Branch \*  
Branch Office

IFSC Code \*  
STAR000567866

Swift Code \*  
GTBKinBB32

Additional Information

Account No \*  
23456789012345ACC

Effective Date  
21 Aug 2024

Account Status \*  
Active

Bank Address

Line 1 \*  
456 Galaxy  
cvb

Line 2  
Victory Town  
cvb

Line 3  
Starville ST 67890  
cvb

Province \*  
Malampa  
Penama

Island \*  
Pele  
Emau

Village \*  
Natadola

PO Box No  
32564

Update

Notes 0 Status History 1

7. Click the **Refresh** button to restore the previous values.
8. Click the **Close** icon to close the panel.
9. The saved bank information will be displayed in the bank information grid.

Customer Update > Details

Passport No P567890... Skp6357813

Birth Reg No BRN567...

Bank Information 1

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

Bank Name	Bank Code	Account Number	IFSC Code	Effective Date	Status
ICICI	icici324651	23456789012345ACC	STAR000567866	21 Aug 2024	Active

Assigned Officer 1

Document 4

Communication History 1

Notes 0 Status History 1



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



### Assigned Officer :

1. Assigned officer history based on each status change will be maintained in this tab.

The screenshot shows the 'Customer Update > Details' page. The 'Assigned Officer' section is expanded, displaying a table of assigned officers. The table has columns: Assigned Officer, Assigned Date, Assigned By, and Status. The current entry shows JONES J assigned on 22 Aug 2024 by JONES J, with a status of Pending Submission. The interface includes a sidebar with 'My Task' and 'CRM' icons, and a top navigation bar with 'Customer Update > Details' and a user profile 'Welcome JONES J'.

Assigned Officer	Assigned Date	Assigned By	Status
JONES J	22 Aug 2024	JONES J	Pending Submission

2. Officers can be reassigned to any other officer in the same group. To Reassign, select the Officer Name and click the Re Assign button.

This screenshot is similar to the previous one, but it highlights the 'Reassign' button located next to the 'Assigned Officer' table. The button is labeled 'Reassign' and is positioned to the right of the table's status column. The table entry remains JONES J assigned on 22 Aug 2024 by JONES J, with a status of Pending Submission. The interface elements are consistent with the previous screenshot.

Assigned Officer	Assigned Date	Assigned By	Status
JONES J	22 Aug 2024	JONES J	Pending Submission



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



### Upload Document:

1. Click the Select button below the document tab.
2. Select the file from your system library and upload the document.

The screenshot shows the 'Customer Update > Details' page. The 'Document' tab is selected, displaying a table of uploaded documents. The table has columns: Document Name, File Name, File Type, and Uploaded Date. There are four documents listed: 'Other Document', 'Votor ID', 'Birth Certificate', and 'Driving License'. The 'Birth Certificate' and 'Driving License' documents have a '-' in the File Name column. To the right of each document name, there are icons for viewing, downloading, and deleting the document.

Document Name	File Name	File Type	Uploaded Date
Other Document	Other Document.PNG	.PNG	
Votor ID	Votor ID.png	png	
Birth Certificate	-		
Driving License	-		

### Communication History:

1. In this tab, the email log will be displayed with the recipient, date & time, status, and action.

The screenshot shows the 'Customer Update > Details' page with the 'Communication History' tab selected. It displays a table of email logs. The table has columns: To, Date, Status, and Action. There is one entry showing an email to 'jones.itgalax@gmail.com' on '22 Aug 2024 | 08:42 AM' with a status of 'Mail Delivery Failed'. Above the table, there is a pagination bar showing 'Showing: 1 - 1 of 1 Entries' and a search icon.

To	Date	Status	Action
jones.itgalax@gmail.com	22 Aug 2024   08:42 AM	Mail Delivery Failed	



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



### Notes:

1. Click the **Add** button below the notes tab.

Customer Update > Details

23 Garden Grovess Orchard Hill East  
Field Natadola Pele Malampa - 4040

TIN: TIN543210  
Driv Lic No: DL56789...  
National ID: NID4455...  
Passport No: P567890...  
Birth Reg No: BRN567...

7981234505  
7981234505  
Skp6357813

Beneficiary  
Client  
Gaurdian  
Customer

Bank Information 1  
Assigned Officer 1  
Document 4  
Communication History 1  
Notes 0  
Status History 1

+

2. Click on Add button , to navigate to the Customer Update add notes pop-up screen.

Customer Update > Detail > Add Notes

Status  
Pending Submission

Notes 0 / 250



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



3. Select **Status** and enter **Notes** .

The screenshot shows a modal window titled 'Customer Update > Detail > Add Notes'. It features a 'Status' dropdown menu currently set to 'Pending Verification'. Below the status is a 'Notes' text area, also containing 'Pending Verification'. The text area has a character count '20 / 250'. The modal includes standard window controls (minimize, maximize, close) in the top right corner. The background shows the CRM interface with a sidebar containing 'My Task' and 'CRM' icons, and a top navigation bar with 'Customer Update > Details' and a user profile 'Welcome JONES J'.

4. Click the **Save** button to change the status.
5. Click the **Clear** button next to save button to remove all entered or selected details.
6. Click the **Close** icon to close the panel.
7. The saved notes will be displayed in the notes grid.

The screenshot displays the 'Customer Update > Details' page. At the top, there's a header with 'Customer Update > Details' and a user profile 'Welcome JONES J'. Below the header, the customer's details are shown: '23 GARDEN STREET, GROUND FLOOR, LAST Field Natadola Pele Malampa - 4040'. To the right of the address, there are fields for 'Driv Lic No' (DL56789...), 'National ID' (NID4455...), 'Passport No' (P567890...), and 'Birth Reg No' (BRN567...). Further right, there are contact details: '7981234505' and 'Skp6357813'. Below these, there are checkboxes for 'Gaurdian' and 'Customer'. The main section of the page is a grid of tabs: 'Bank Information' (1), 'Assigned Officer' (2), 'Document' (4), 'Communication History' (2), 'Notes' (1), and 'Status History' (2). The 'Notes' tab is selected, showing a message 'Moving to Pending Verification' and a timestamp 'JONES J | 22 Aug 2024 01:10 PM | Pending Verification'.



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



### Approval Process:

This screen also includes a process of approval. The steps involved are:

1. Customer Update Officer:
  - Update status to Pending Verification.

Customer Update > Detail > Add Notes

Status \*

Pending Verification

Notes \*

Moving to Pending Verification

30 / 250

Save

2. Customer Update Verification Officer:
  - Update status to Pending Approval.

Customer Update > Details

Assigned Officer

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

Assigned Officer	Assigned Date	Assigned By	Status
Customer Update Approved Officer	22 Aug 2024	Robert Lewis	Pending Approval
Robert Lewis	22 Aug 2024	JONES J	Pending Verification
JONES J	22 Aug 2024	JONES J	Pending Submission

Document 4

Communication History 3

Notes 2 | Status History 3

Moving to pending Approval

Robert Lewis | 22 Aug 2024 01:19 PM | Pending Approval

Moving to Pending Verification

JONES J | 22 Aug 2024 01:10 PM | Pending Verification





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



### 3. Customer Update Approval Officer:

- Update status to Approved.

The screenshot shows the 'Customer Update' details page. The top navigation bar includes a back arrow, 'Customer Update > Details', and a user profile 'Welcome Customer Update Approved Officer 1'. The left sidebar has 'My Task' and 'CRM' icons. The main content area displays a table with the following data:

Bank Name	Bank Code	Account Number	IFSC Code	Effective Date	Status
ICICI	icici324651	23456789012345ACC	STAR000567866	21 Aug 2024	Active

Below the table, there are expandable sections for 'Assigned Officer' (4), 'Document' (4), 'Communication History' (4), and 'Notes' (3) / 'Status History' (4). The 'Status History' section is expanded, showing a timeline of status changes:

- Moving to Approved: Customer Update Approved Officer 1 | 22 Aug 2024 01:32 PM | **Approved**
- Moving to pending Approval: Robert Lewis | 22 Aug 2024 01:19 PM | **Pending Approval**
- Moving to Pending Verification: JONES J | 22 Aug 2024 01:10 PM | **Pending Verification**

### Status History:

1. In this tab, the status value, officer name, and date & time will be displayed.

The screenshot shows the 'Status History' tab selected. The top navigation bar and left sidebar are the same as in the previous screenshot. The main content area displays a timeline of status changes:

- Approved**: Customer Update Approved Officer 1 | 22 Aug 2024 | 01:32 PM
- Pending Approval**: Robert Lewis | 22 Aug 2024 | 01:19 PM
- Pending Verification**: JONES J | 22 Aug 2024 | 01:10 PM
- Pending Submission**: JONES J | 22 Aug 2024 | 08:42 AM

**\*\*END OF DOCUMENT\*\***



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**CRM Module- User Manual**

