



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



### Trust Settlement Detail

**User Roles: Trust Officer , Manager , Registrar Clerk, Accounts Officer**

#### Overview:

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

Trust Settlement > Details			
Trust App Ref No TSMR24090400001	Available Amount 0.00	Lead Ref No LEAD24090400003	Payment Option Domestic
Payment Mode Bank Transfer	Assigned Officer Trust Officer 4	Application Stage Receive Supporting Documents	Application Status / Action Status Application Created / Approved
<b>Application</b>   Process   History   Payment			
Trust Settlement Information			
<b>Application Information</b>		<b>Payment Information</b>	<b>Trust Account Information</b>
Application Ref No TSMR24090400001	Entered By Trust Officer 4	Payment Mode Bank Transfer	Trust Account No 634283
Lead Ref No LEAD24090400003	Entered Date 04 Sep 2024	Payment Option Domestic	Beneficiary Name -
Mode Of Application Email	Applied By -	Bank Name -	Guardian Name -
Reason For Withdrawal -	Applied Date 04 Sep 2024	Available Amount 0.00	Guardian Relationship Parent
	Assigned Officer TO4		

#### Application Tab:

##### User : Trust Officer

This section contains details such as Trust Settlement Information, Applicant and Bank Settlement.

#### Trust Settlement Information Section :

##### Application Information

- System will display the following fields : Application Ref No , Lead Ref No , Mode of Application , Reason for Withdrawal , Entered By , Entered Date , Applied By , Applied Date , Assigned Officer.

##### Payment Information

- System will display the following fields : Payment Mode , Payment Option , Bank Name , Available Amount.

##### Trust Account Information



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



- System will display the following fields : Trust Account No , Beneficiary Name , Guardian Name , Guardian Relationship.

The screenshot displays the 'Trust Settlement > Details' page. At the top, there's a navigation bar with a back arrow, the title 'Trust Settlement > Details', and a user profile 'Welcome Trust Officer 4'. Below this is a summary table with four columns: Trust App Ref No (TSMR24090400001), Available Amount (0.00), Lead Ref No (LEAD24090400003), and Payment Option (Domestic). Below the summary table are tabs for 'Application', 'Process', 'History', and 'Payment'. The 'Application' tab is active, showing 'Trust Settlement Information'. This section is divided into three columns: Application Information, Payment Information, and Trust Account Information. The Application Information column contains fields for Application Ref No (TSMR24090400001), Lead Ref No (LEAD24090400003), Mode Of Application (Email), and Reason For Withdrawal (-). The Payment Information column contains fields for Payment Mode (Bank Transfer), Payment Option (Domestic), Bank Name (-), and Available Amount (0.00). The Trust Account Information column contains fields for Trust Account No (634283), Beneficiary Name (-), Guardian Name (-), and Guardian Relationship (Parent).

Trust App Ref No	Available Amount	Lead Ref No	Payment Option
TSMR24090400001	0.00	LEAD24090400003	Domestic

Payment Mode	Assigned Officer	Application Stage	Application Status / Action Status
Bank Transfer	Trust Officer 4	Receive Supporting Documents	Application Created / Approved

### Trust Settlement Information

Application Information		Payment Information	Trust Account Information
Application Ref No	Entered By	Payment Mode	Trust Account No
TSMR24090400001	Trust Officer 4	Bank Transfer	634283
Lead Ref No	Entered Date	Payment Option	Beneficiary Name
LEAD24090400003	04 Sep 2024	Domestic	-
Mode Of Application	Applied By	Bank Name	Guardian Name
Email	-	-	-
Reason For Withdrawal	Applied Date	Available Amount	Guardian Relationship
-	04 Sep 2024	0.00	Parent
	Assigned Officer		
	TO4		

### Applicant Section :

This section contains details such as General Information , Communication & Address.

1. This tab will display the following information: Adding an General Information , Communication & Address:
2. Click on the "Edit" button and navigate to the Trust **Settlement Applicant Information Detail** pop-up screen .



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



The screenshot displays the 'Trust Settlement > Details' page. A modal window titled 'Trust Settlement > Applicant Information > Detail' is open, showing four tabs: Applicant Information, Address Details, KYC Details, and Social Platform Details. The Applicant Information tab is active, displaying the following data:

Applicant Information	Address Details	KYC Details	Social Platform Details
Applicant CRM No CUST24081300010	Line 1 -	FNPF No 333	Facebook ID -
First Name Timaima	Line 2 -	Driving License No -	LinkedIn ID -
Middle Name T	Line 3 -	Voter ID -	Whatsapp -
Last Name Vakuruivalu	Province -	National ID Fiji	Viber -
Date Of Birth 12 Aug 2024	Island -	TIN -	Skype ID -
Date Of Death -	Village -	Passport No -	
Gender Female	Po Box No -		
Nationality Fiji			
Email ID 43543543@123.com			
Contact No -			

3. Click the Edit button to enter Applicant Information , Address Details , KYC Details , Social Platform Details .

The screenshot displays the 'Trust Settlement > Details' page. A modal window titled 'Trust Settlement > Applicant Information > Detail' is open, showing four tabs: Applicant Information, Address Details, KYC Details, and Social Platform Details. The Applicant Information tab is active, displaying the following data:

Applicant Information	Address Details	KYC Details (Any one field is Mandatory)	Social Platform Details
First Name * Timaima	Line 1 -	FNPF No * 333	Facebook ID -
Middle Name T	Line 2 -	Driving License No -	LinkedIn ID -
Last Name * Vakuruivalu	Line 3 -	Voter ID -	Whatsapp -
Date Of Birth * 12 Aug 2024	Province --Select--	National ID Fiji	Viber -
Date Of Death -	Island --Select--	TIN -	Skype ID -
Gender * Female	Village --Select--	Passport No -	
Nationality * Fiji	PO Box No -	Birth Reg No -	
Email ID -			

4. System allows to change the following fields : Applicant Information , Address Details , Kyc Details , Social Platform Details.
5. Click on the "Update" button to update the entered Fields .
6. System will display the Updated details in the Applicant grid screen.



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



7. Click on the "**Clear**" button to remove the entered/selected details.
8. Click on the "**Close**" button to close the popup.

### Bank Settlement Section :

This section contains details such as Overseas Bank Details & Overseas Bank Address .

1. This tab will display the following information: **Adding an Overseas Bank Details & Overseas Bank Address :**
2. Click on the "**Edit**" button.



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



Trust Settlement > Details

Trust App Ref No: TSMR24090400001

Available Amount: 0.00

Lead Ref No: LEAD24090400003

Payment Option: Domestic

Payment Mode: Bank Transfer

Assigned Officer: Trust Officer 4

Application Stage: Receive Supporting Documents

Application Status / Action Status: Application Created / Approved

**Bank Settlement**

**Overseas Bank Details**

Account No \*  
AC

Bank Name \*  
SC

Bank Code \*  
S

Branch \*  
S

Is Overseas Bank  
☐ No

**Overseas Bank Address**

Line 1 \*  
dva

Line 2  
dva

Line 3  
dva

Province \*  
Kadavu

Island \*  
KADAVU

Village \*  
Naibaci

PO Box No  
P.O. Box 7

3. Enter /Select **Overseas Bank Details** - Account No , Bank Name , Bank Code , Branch , Is Overseas Bank (Yes / No) Checkbox.
4. Enter /Select **Overseas Bank Address** - Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No.
5. Click on the "Save" button to click the **Save** button .
6. Click on the "Clear" button to remove the entered/selected details.
7. System will display the saved following fields under : **Overseas Bank Details & Overseas Bank Address**.



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



The screenshot displays the 'Trust Settlement > Details' page. At the top, there is a summary section with the following information:

Field	Value
Trust App Ref No	TSMR24090400001
Available Amount	0.00
Lead Ref No	LEAD24090400003
Payment Option	Domestic
Payment Mode	Bank Transfer
Assigned Officer	Trust Officer 4
Application Stage	Receive Supporting Documents
Application Status / Action Status	Application Created / Approved

Below the summary, there is a 'Bank Settlement' section. It contains two main areas:

- Overseas Bank Details:**
  - Account No: AC
  - Bank Name: SC
  - Bank Code: S
  - Branch: S
  - Is Overseas Bank: No
- Overseas Bank Address:**
  - Line 1: dva
  - Line 2: dva
  - Line 3: dva
  - Province: Kadavu
  - Island: KADAVU
  - Village: Naibaci
  - Po Box No: P.O. Box 7

### Process Tab:

#### Receive Supporting Document

User : Trust Officer

#### Linked Document Section :

- Click on the Link Document Section and will display the linked documents.

#### Detail Section :

1. Click the Detail Tab and display the following fields under **"Assigned Officer"** name and **"Assigned Date"**.
2. Click and Select the **"Document Type"** from the Document Type Drop-down List.
3. Click Browse or Drag & drop option to upload the document for selected Document Type.
4. Click the **"Upload"** button near the delete button.



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



Trust Settlement > Details

Trust App Ref No: TSMR24090400001  
Available Amount: 0.00  
Lead Ref No: LEAD24090400003  
Payment Option: Domestic

Payment Mode: Bank Transfer  
Assigned Officer: Trust Officer 4  
Application Stage: Receive Supporting Documents  
Application Status / Action Status: Application Created / Approved

Application | **Process** | History | Payment

Receive Supporting Document

Detail | Linked Document

Assigned Officer: Trust Officer 4  
Assigned Date: 04 Sep 2024

Document Type: Id Proof

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

Id Proof.png | 0.04mb

Document Name	File Name	Size	Action
No records found Try adjusting your search or filter options to find what you're looking for			

Notes \*  
0 / 250

5. Click the **"Delete"** button to delete the selected document.
6. Once Uploaded Document will display in a grid with Document Name , File Name , Size.
7. Click the Download button symbol under the Action field to download the uploaded document.
8. Click the Delete button symbol under the Action field to delete the uploaded document.
9. Click the Eye button symbol under the Action field to view the uploaded document.

Trust Settlement > Details

Trust App Ref No: TSMR24090400001  
Available Amount: 0.00  
Lead Ref No: LEAD24090400003  
Payment Option: Domestic

Payment Mode: Bank Transfer  
Assigned Officer: Trust Officer 4  
Application Stage: Receive Supporting Documents  
Application Status / Action Status: Application Created / Approved

Application | **Process** | History | Payment

Receive Supporting Document

Detail | Linked Document

Assigned Officer: Trust Officer 4  
Assigned Date: 04 Sep 2024

Document Type: Id Proof

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

Id Proof.png | 0.04mb

Document Name	File Name	Size	Action
Id Proof	Id Proof.png	0.04mb	

Notes \*  
0 / 250

Cancel Document Received

10. Enter **Notes** and click the **Save** button.



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



11. Click the **“Document Received”** button to move to the next process **“Require file to Prepare SoA”**.

Document Name	Actions
Beneficiary Vesting Trust Continuation Letter	<a href="#">Download</a>
Beneficiary Identification Form	<a href="#">Download</a>
List of Requirements for Full Settlement	<a href="#">Download</a>
RC Full Settlement Memo	<a href="#">Download</a>

[Cancel](#) [Document Received](#)

### Require file to Prepare SoA

**User : Registry Clerk**

**Linked Document Section :**

1. Click on the Link Document Section and will display the linked documents.

**Detail Section :**

2. Login with the **“Registry Clerk”** to process the **“Require file to Prepare SoA”** step.
3. Click the Detail Tab and display the following fields under **“Assigned Officer”** name and **“Assigned Date”**.
4. Click and Select the **“Document Type”** from the Document Type Drop-down List.
5. Click Browse or Drag & drop option to upload the document for selected Document Type.
6. Click the **“Upload”** button near the delete button.





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



Trust Settlement > Details

Trust App Ref No: TSMR24090400001  
Available Amount: 0.00  
Lead Ref No: LEAD24090400003  
Payment Option: Domestic  
Payment Mode: Bank Transfer  
Assigned Officer: Registry Clerk  
Application Stage: Files Confirmation by Registry clerk  
Application Status / Action Status: Documents Received / Approved

Application | **Process** | History | Payment

Receive Supporting Document

Require File to Prepare SoA

Detail | Linked Document

Assigned Officer: Registry Clerk  
Assigned Date: 04 Sep 2024

Document Type: Trust Files

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

Other Document.PNG | 0.06mb

Document Name	File Name	Size	Action
No records found Try adjusting your search or filter options to find what you're looking for			

Notes \* 0 / 250

- Click the **Delete** button to delete the selected document.
- Once Uploaded Document will display in a grid with Document Name , File Name , Size.
- Click the Download button symbol under the Action field to download the uploaded document.
- Click the Delete button symbol under the Action field to delete the uploaded document.
- Click the Eye button symbol under the Action field to view the uploaded document.
- Enter **Notes** and click the **Save** button.
- Click the **Document Received** button to move to the next process **Prepare SoA** .

Trust Settlement > Details

Trust App Ref No: TSMR24090400001  
Available Amount: 0.00  
Lead Ref No: LEAD24090400003  
Payment Option: Domestic  
Payment Mode: Bank Transfer  
Assigned Officer: Registry Clerk  
Application Stage: Files Confirmation by Registry clerk  
Application Status / Action Status: Documents Received / Approved

Application | **Process** | History | Payment

Require File to Prepare SoA

Detail | Linked Document

Assigned Officer: Registry Clerk  
Assigned Date: 04 Sep 2024

Document Type: Trust Files

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

Document Name	File Name	Size	Action
Trust Files	Other Document.PNG	0.06mb	↓ 🗑️ 👁️

Notes \* 0 / 250

Cancel Document Received



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



### Prepare SoA

#### User : Accounts Officer

1. Login with the “**Accounts Officer**” to process the “**Prepare SoA**” step.
2. Click the Detail Tab and display the following fields under “**Assigned Officer**” name and “**Assigned Date**”.
3. Click Browse or Drag & drop option to upload the document for selected Document Type.
4. Click the “**Upload**” button near the delete button.

5. Click the “**Delete**” button to delete the selected document.
6. Once Uploaded Document will display in a grid with Document Name , File Name , Size.
7. Click the Download button symbol under the Action field to download the uploaded document.
8. Click the **Delete** button symbol under the Action field to delete the uploaded document.
9. Click the Eye button symbol under the Action field to view the uploaded document.
10. Enter **Notes** and click the **Save** button.
11. Click the “**Document Received**” button to move to the next process.



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



### Execute Memorandum of Discharge :

#### User : Registry Clerk

1. Login with the “**Registry Clerk**” to process the “**Execute Memorandum of Discharge**” step.
2. Click the Detail Tab and display the following fields under “**Assigned Officer**” name and “**Assigned Date**”.
3. Click Browse or Drag & drop option to upload the document for selected Document Type.
4. Click the “**Upload**” button near the delete button.



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



Trust Settlement > Details

Trust App Ref No: TSMR24090400001 | Available Amount: 0.00 | Lead Ref No: LEAD24090400003 | Payment Option: Domestic

Payment Mode: Bank Transfer | Assigned Officer: Registry Clerk | Application Stage: Execute Memorandum of Discharge | Application Status / Action Status: Statement of Accounts Prepared / Approved

Application | **Process** | History | Payment

Receive Supporting Document

Require File to Prepare SoA

Prepare SoA

Execute Memorandum of Discharge

Detail | Linked Document

Assigned Officer: Registry Clerk | Assigned Date: 04 Sep 2024

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

Uploaded Document: Driving License.PNG | 0.14mb

Notes: 0 / 250

Cancel | Document Received

5. Click the **Delete** button to delete the selected document.
6. Once Uploaded Document will display in a grid with Document Name , File Name , Size.
7. Click the Download button symbol under the Action field to download the uploaded document.
8. Click the **Delete** button symbol under the Action field to delete the uploaded document.
9. Click the Eye button symbol under the Action field to view the uploaded document.
10. Enter **Notes** and click the **Save** button.
11. Click the **Document Received** button to move to the next process **Prepare SoA** .

Trust Settlement > Details

Trust App Ref No: TSMR24090400001 | Available Amount: 0.00 | Lead Ref No: LEAD24090400003 | Payment Option: Domestic

Payment Mode: Bank Transfer | Assigned Officer: Registry Clerk | Application Stage: Execute Memorandum of Discharge | Application Status / Action Status: Statement of Accounts Prepared / Approved

Prepare SoA

Execute Memorandum of Discharge

Execute Memorandum of Discharge

Detail | Linked Document

Assigned Officer: Registry Clerk | Assigned Date: 04 Sep 2024

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

Uploaded Document

File Name	File Size
Driving License(2).PNG	0.14 MB

Format: PNG

Notes: 0 / 250

Cancel | Document Received



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



### Approval Of Statement :

User : Registry Clerk

1. Select / check the checkbox under Approval of Statement.
2. Click the **save** button to save the checked checklist.

Trust App Ref No	Available Amount	Lead Ref No	Payment Option
TSMR24090400001	0.00	LEAD24090400003	Domestic

Payment Mode	Assigned Officer	Application Stage	Application Status / Action Status
Bank Transfer	Registry Clerk	Approval of Settlement	Memorandum of Discharge Executed / Pending Submission

#### Approval Of Statement

- ☐ Request for mode of payment confirmed
- ☒ Beneficiary ID form duly completed with p/port size photo
- ☒ Statutory Declaration completed with ID for non availability of No. 4
- ☒ Beneficiary second ID i.e. FNPF/Driving Licence/Passport/Tertiary/Voter Registration ID
- ☒ Relation to other Estates/FNPF/Compensation File
- ☐ Beneficiary is a nominee of trust proceeds
- ☒ All fees due to FPTCL charged and journalized
- ☐ Accrued interest until 30/12/14
- ☐ Beneficiary ID form certified in accordance with Part B
- ☐ Tax Clearance

Designation	User Name	Verified Date	Action
General Manager	Registry Clerk		

3. Click the “Open” button under **Action** and click the open button from the verify document to redirect to the **Trust Settlement Application Detail Add Notes** pop-up Screen to change the Action status “**Pending Submission**” to “**Pending Verification**”.
4. Enter **Notes** and click on **Save** button.



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



Trust Settlement > Details

Trust App Ref No: TSMR24090400001  
Available Amount: 0.00  
Lead Ref No: LEAD24090400003  
Payment Option: Domestic  
Payment Mode: Bank Transfer  
Assigned Officer: Registry Clerk  
Application Stage: Approval of Settlement  
Application Status / Action Status: Memorandum of Discharge Executed / Pending Submission

Prepare SoA  
Execute Memorandum of Discharge  
Approval Of Statement

☐ Request for mode of payment confirmed  
☒ Beneficiary ID form duly completed with p/p  
☒ Statutory Declaration completed with ID for  
☒ Beneficiary second ID i.e. FNPF/Driving License  
☒ Relation to other Estates/FNPF/Compensation  
☐ Beneficiary is a nominee of trust proceeds  
☒ All fees due to FPTCL charged and journalized  
☐ Accrued interest until 30/12/14  
☐ Beneficiary ID form certified in accordance with  
☐ Tax Clearance

Trust Settlement Application > Detail > Add Notes

Action Status\*  
Pending Verification

Application Status  
Memorandum of Discharge Executed

Application Stage  
Approval of Settlement

Notes\*  
MOVING PV

9 / 250

Designation	User Name	Verified Date	Action
General Manager	Registry Clerk		

- Click the “Open” button under **Action** and click the open button from the verify document to redirect to the **Trust Settlement Application Detail Add Notes** pop-up Screen to change the Action status “**Pending Verification**” to “**Pending Approval**”.
- Enter **Notes** and click on **Save** button.

Trust Settlement > Details

Trust App Ref No: TSMR24090400001  
Available Amount: 0.00  
Lead Ref No: LEAD24090400003  
Payment Option: Domestic  
Payment Mode: Bank Transfer  
Assigned Officer: Registry Clerk  
Application Stage: Approval of Settlement  
Application Status / Action Status: Memorandum of Discharge Executed / Pending Approval

Prepare SoA  
Execute Memorandum of Discharge  
Approval Of Statement

☐ Request for mode of payment confirmed  
☐ Beneficiary ID form duly completed with p/p  
☐ Statutory Declaration completed with ID for  
☐ Beneficiary second ID i.e. FNPF/Driving License  
☐ Relation to other Estates/FNPF/Compensation  
☐ Beneficiary is a nominee of trust proceeds  
☐ All fees due to FPTCL charged and journalized  
☐ Accrued interest until 30/12/14  
☐ Beneficiary ID form certified in accordance with  
☐ Tax Clearance

Trust Settlement Application > Detail > Add Notes

Action Status\*  
Pending Approval

Application Status  
Memorandum of Discharge Executed

Application Stage  
Approval of Settlement

Notes\*  
MOVING TO PA

12 / 250

Designation	User Name	Verified Date	Action
General Manager	Registry Clerk		
General Manager	Registry Clerk		



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



- Click the “Open” button under **Action** and click the open button from the verify document to redirect to the **Trust Settlement Application Detail Add Notes** pop-up Screen to change the Action status “**Pending Approval**” to “**Approved**”.
- Enter **Notes** and click on **Save** button.

The screenshot displays the 'Trust Settlement Application > Detail > Add Notes' pop-up window. The form includes the following fields:

- Action Status:** Approved
- Application Status:** Memorandum of Discharge Executed
- Application Stage:** Approval of Settlement
- Notes:** MOVING TO APED

The background shows the main application details page with a sidebar menu and a table of users.

Designation	User Name	Verified Date	Action
General Manager	Registry Clerk		[Open]
General Manager	Registry Clerk		[Open]

- Click on the "**Clear**" button to remove the entered/selected details.
- Click on the "**Close**" button to close the popup.

## History Tab:

### Assigned Officer

The assigned officer's details are displayed when changing the process status.



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



Trust Settlement > Details

Trust App Ref No: TSMR24090400001 | Available Amount: 0.00 | Lead Ref No: LEAD24090400003 | Payment Option: Domestic

Payment Mode: Bank Transfer | Assigned Officer: Registry Clerk | Application Stage: Approval of Settlement | Application Status / Action Status: Memorandum of Discharge Executed / Approved

Application | Process | **History** | Payment

Notes (3)

Assigned Officer (7)

Assigned Officer	Assigned Date	Assigned By	Status
Trust Officer 4	04-09-2024 14:40	Trust Officer 4	Application Created
Registry Clerk	04-09-2024 15:13	Trust Officer 4	Documents Received
Accounts Officer1	04-09-2024 15:22	Registry Clerk	Files Confirmed
Registry Clerk	04-09-2024 15:29	Accounts Officer1	Statement of Accounts Prepared
Registry Clerk	04-09-2024 15:29	Registry Clerk	Memorandum of Discharge Executed
Registry Clerk	04-09-2024 15:29	Registry Clerk	Memorandum of Discharge Executed
Registry Clerk	04-09-2024 15:29	Registry Clerk	Memorandum of Discharge Executed

Showing 1 - 7 of 7 Entries | 25 | < 1 >

Status History | Communication History

### Notes

The Status will appear in notes when added in the Process tab.

Trust Settlement > Details

Trust App Ref No: TSMR24090400001 | Available Amount: 0.00 | Lead Ref No: LEAD24090400003 | Payment Option: Domestic

Payment Mode: Bank Transfer | Assigned Officer: Registry Clerk | Application Stage: Approval of Settlement | Application Status / Action Status: Memorandum of Discharge Executed / Approved

Application | Process | **History** | Payment

Notes (3)

MOVING PV  
RC | 04-09-2024 15:36 | Pending Verification

MOVING TO PA  
RC | 04-09-2024 15:37 | Pending Approval

MOVING TO APRD  
RC | 04-09-2024 15:37 | **Approved**

Assigned Officer (7)

Status History | Communication History

### Status History

Status History will be created against each status change and maintained in this tab.





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



Trust Settlement > Details

Trust App Ref No: TSMR24090400001

Available Amount: 0.00

Lead Ref No: LEAD24090400003

Payment Option: Domestic

Payment Mode: Bank Transfer

Assigned Officer: Registry Clerk

Application Stage: Approval of Settlement

Application Status / Action Status: Memorandum of Discharge Executed / Approved

Application | Process | **History** | Payment

Notes (3)

Assigned Officer (7)

**Status History** | Communication History

- Statement of Accounts Prepared  
Accounts Officer1 | 04 Sep 2024 | 03:29 PM
- Memorandum of Discharge Executed  
Registry Clerk | 04 Sep 2024 | 03:34 PM
- Memorandum of Discharge Executed  
Registry Clerk | 04 Sep 2024 | 03:36 PM
- Memorandum of Discharge Executed  
Registry Clerk | 04 Sep 2024 | 03:38 PM
- Documents Received  
Trust Officer 4 | 04 Sep 2024 | 03:13 PM

### Communication History

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



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



Trust Settlement > Details

Admin

My Diary

My Task

Files

Organization

CRM

Trust

Will

Estate

Legal

Finance

Trust App Ref No  
TSMR24090400001

Available Amount  
0.00

Lead Ref No  
LEAD24090400003

Payment Option  
Domestic

Payment Mode  
Bank Transfer

Assigned Officer  
Registry Clerk

Application Stage  
Approval of Settlement

Application Status / Action Status  
Memorandum of Discharge Executed / Approved

Application Process History Payment

Notes 3

Assigned Officer 7

Status History Communication History

Showing: 1 - 4 of 4 Entries | 25 | < 1 >

To	Date   Time	Status	Action

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