



Fiji Public Trustee Corporation Limited CRM Module- User Manual



Organization Application Details

Users: Organization Creation Officer, Organization Verification Officer, Organization Approving Officer.

This screen will allow the user to create and approve the new organization.

Organization App Ref No: OA240800026

Organization Name: Harmony Music Academy

Organization Ref No: ORG240800008

Organization Status: Active

Organization Type: Education

Effective Date: 07 Aug 2024

Status: Approved

Application | Upload Document | History

Organization Application Information

General Information

Organization Name: Harmony Music Academy

Organization Type: Education

Email ID: academy@harmonymusic.com

Contact No: 9980090123

Website: www.harmonymusic.com

Effective Date: 07 Aug 2024

Application Status: Approved

Organization Address

1919 Melody SttD Music Town MT 90124

Malampa Pele

Longana 1920

Contact Person

Application Tab

Organization Application Information Section:

1. Click On **Edit** button to open Edit Organization Application Popup.



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2. Enter/Select Organization Name, Organization Type, Email ID, Contact No, Website, Effective Date and Organization Status.

Organization Application > Details

Organization Application Ref No: OA24080022

Application Type: New Organization application

Application Status: Pending Approval

Organization Details

Organization Name: Global Education Centers

Organization Type: Education

Email ID: info@globaledu.com

Contact No: 7880056789

Website: SSSDVDSV

Effective Date: 06 Aug 2024

Address Details

Line 1: 505 Learning Stt

Line 2: Knowledge City

Line 3: KC 56789

Province: Malampa

Island: Pele

Village: Longana

56789

3. Enter/Select Line 1, Line 2, Line 3, Province, Island, Village, Location, Area and PO Box No.
4. Click the **Save** button to save the entered Organization Application details.
5. Click the **Clear** button to clear all the entered Organization Application details.
6. Click the **Back** button to go back to the previous screen.

Contact Person Section:

1. Click the **Add** button to add the Contact Person Details.



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2. Enter/Select Contact Person Name, Contact No, Email ID, Designation, Date Of Birth, Gender and Status.
3. Enter the Contact Person Identification Details such as National ID, Voter ID, Driving License No and PF No any one will be entered.
4. Click the **Save** button to save the entered Contact Person Details.
5. Click the **Clear** button to clear all entered Contact Person Details.
6. Click the **Back** button to go back to the previous screen.
7. The saved details will be displayed as a list in the left panel. On clicking the record, its details will be displayed on the right panel.

Bank Section:

1. Click Add button, initially Bank Code text field will be displayed with Get button.



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2. Enter Bank Code. If Bank Code already exists in the Bank Master screen then Bank details will get populated automatically and a text field to enter Account No will be displayed on clicking **Get** button.
3. Click the **Get** button.
4. If Bank code does not exist in the Bank Master Screen then fields to enter all the details will be displayed.
5. On Clicking the Get button, the following fields will be displayed: Swift Code, Bank Code, Bank Name, Branch Name, Account Number, Routing No, Status, Organization Bank Status, Line 1, Province, Island, Village, Location, Area and PO Box No.
6. Enter/Select Swift Code, Bank Name, Branch Name, Account Number, Routing No, Status, Organization Bank Status, Line 1, Line 2, Line 3, Province, Island, Village, Location, Area and PO Box No.
7. Click the **Save** button to save the Bank details.
8. Click the **Clear** button to clear all the entered Bank Details.



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9. The saved details will be displayed as a list in the left panel. On clicking the record, its details will be displayed on the right panel.

Upload Document Tab

1. Select the Document Type and Click the Document Upload tab to upload the required document.

The screenshot displays the 'Organization Application > Details' page. The top section shows organization details: Organization App Ref No (OA240800022), Organization Name (Global Education Centers), Organization Ref No (-), and Organization Status (Active). Below this, there are tabs for 'Application', 'Upload Document', and 'History'. The 'Upload Document' tab is active, showing a document upload interface. On the right, there is a 'Document Type' dropdown menu set to '--Select--'. Below it is a box with a cloud icon and a plus sign, labeled 'Upload'. To the right of this box, it says 'Drag & drop files or Browse'. Below this, it lists 'Supported Format : jpg, jpeg, png, tiff, gif, doc, pdf, DOCX, ppt, csv'. On the left side of the page, there is a sidebar with icons for 'My Task', 'Organization', 'CRM', 'Trust', 'Will', 'Estate', and 'Legal'.

2. Click the **Select** button to upload the required document.
3. Click the **Clear** button to clear the Uploaded document.
4. Click the **Download** button to download the uploaded document.
5. Click the **View** button to view the uploaded document.

History Tab

Notes Section:

User: Organization Creation Officer

1. To change the status,



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- A. In the Notes tab, select the status as “Pending Verification” and add notes and click the **Save** button.

- B. The status will be changed from “Pending Submission” to “Pending Verification”.
- C. After changing the Pending verification status, the request will be assigned automatically to the Organization Verification Officer and a mail notification will be sent.

User: Organization Verification Officer

2. To change the status,
- D. In the Notes tab, select the status as “Pending Approval” and add notes and click the **Save** button.



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The screenshot displays the 'Organization Application > Details' page in the CRM Module. The background shows fields for Organization App Ref No (OA240800022), Organization Name (Global Education Centers), Organization Ref No (-), and Organization Status (Active). A modal window titled 'Add Notes' is open, featuring a 'Status' dropdown menu set to 'Pending Approval' and a 'Notes' text area with a character count of 0 / 250. The left sidebar contains navigation icons for My Task, Organization, CRM, Trust, Will, Estate, and Legal. The bottom of the screen shows a table with columns for Assigned Officer, Assigned Date, Assigned By, and Status, with a pagination bar indicating 'Showing: 1 - 3 of 3 Entries'.

E. The status will be changed from “Pending Verification” to “Pending Approval”.

F. After changing the Pending Approval status, the request will be assigned automatically to the Organization Approving Officer and a mail notification will be sent.

User: Organization Approving Officer

3. To change the status,



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The screenshot displays the 'Organization Application > Details' page in the CRM Module. The main form shows details for Organization App Ref No OA240800022, Organization Name Global Education Centers, and Organization Status Active. A modal dialog titled 'Add Notes' is open, showing a dropdown menu for 'Status' with 'Approved' selected, and a text area for 'Notes' with a character count of 0 / 250. The background shows a sidebar with navigation icons for My Task, Organization, CRM, Trust, Will, Estate, and Legal. The bottom of the screen shows a table with columns for Assigned Officer, Assigned Date, Assigned By, and Status.

- G. In the Notes tab, select the status as “Approved” and add notes and click the **Save** button.
- H. The status will be changed from “Pending Approval” to “Approved” and Organization Application will be approved.
- I. The Approved Organization Application will be displayed in the Registered Organization screen. Organization Ref No will be generated and mail notification will be sent to the Organization.

Assigned Officer Section:

- 4. Officers auto-assigned based on each status change will be created and shown in this tab.



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The screenshot displays the 'Organization Application > Details' page. The top section shows application details: Organization App Ref No (OA240800022), Organization Name (Global Education Centers), Organization Ref No (-), and Organization Status (Active). Below this, the Organization Type is Education, Effective Date is 06 Aug 2024, and Status is Pending Approval. The page has three tabs: Application, Upload Document, and History. The History tab is active, showing a list of assigned officers. The table has columns for Assigned Officer, Assigned Date, Assigned By, and Status. The status of each officer is displayed in a colored box: Pending Approval (blue), Pending Verification (orange), and Pending Submission (red). Below the table, there are sections for Status History (5) and Communication History (1). The Status History section shows a pending approval status on 07 Aug 2024 at 05:58 PM.

Assigned Officer	Assigned Date	Assigned By	Status
Organization Approving Officer	07 Aug 2024	Organization Verification Officer	Pending Approval
Organization Verification Officer	07 Aug 2024	Organization Creation Officer	Pending Verification
Organization Creation Officer	06 Aug 2024	Organization Creation Officer	Pending Submission

- Officers can reassign to any other officer in the same group. To Reassign, select the Officer Name and click the **ReAssign** button.
- Assigned Officer, Assigned Date, Assigned By and Status will be displayed.

Status History Section:

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



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Organization Application > Details

Welcome Customer Creation Officer

Organization App Ref No OA240800022	Organization Name Global Education Centers	Organization Ref No -	Organization Status Active
Organization Type Education	Effective Date 06 Aug 2024	Status Pending Approval	

Application Upload Document History

Notes 2

Assigned Officer 3

Status History 5 Communication History 1

- Pending Approval
07 Aug 2024 | 05:58 PM
- Pending Verification
07 Aug 2024 | 01:23 PM
- Pending Submission
06 Aug 2024 | 05:36 PM
- Pending Submission
06 Aug 2024 | 12:08 PM
- Pending Submission
06 Aug 2024 | 11:59 AM

Communication History Section:

Organization Application > Details

Welcome Customer Creation Officer

Organization App Ref No OA240800022	Organization Name Global Education Centers	Organization Ref No -	Organization Status Active
Organization Type Education	Effective Date 06 Aug 2024	Status Pending Approval	

Application Upload Document History

Notes 2

Assigned Officer 3

Status History 5 Communication History 1

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

To	Date Time	Status	Action
it.admin.itgalax@gmail.com	07 Aug 2024 05:59 PM	Mail Delivered Successfully	

Email sent against each status change will be maintained in the Email History tab. On the right panel, a detailed view of the email sent will be displayed.

End Of the Document