



Fiji Public Willer Corporation Limited Will Module- User Manual



Will Application

User Roles: Estate Officer, Manager, Register Officer, Accounts Officer

Overview:

This screen allows User to create, search, and open the Will application. To access this screen, Click on **"Will"** from the menu, then select **"Will Application."**

Will Application							
Showing: 1 - 18 of 18 Entries 25 < 1 > Select Lead No							
Will App Ref No	File No	Applicant Name Applicant CRM No	Applied Branch Applied Date	Application Stage Application Status	Action Status	Assigned Officer	
<input type="checkbox"/> WILL24092400001		David Collin Griffith CUST24080500002	Port Suva 24 Sep 2024	Provide Requirement List Providing Requirement List	Approved	Estate Officer 2	
<input type="checkbox"/> WILL24092300005		Anjali Kumari Reddy CUST24091800002	Port Suva 23 Sep 2024	Update Registered Will in the Records Updating Registered Will in the Records	Approved	Estate Officer 1	
<input type="checkbox"/> WILL24092300004		Semi Qio CUST24092300002	Port Suva 23 Sep 2024	Prepare Will Draft Preparing Will Draft	Pending Approval	Estate Officer 2	
<input type="checkbox"/> WILL24092300003		Peter Andrew Williams CUST24092300004	Port Suva 23 Sep 2024	Issue Registered Will Copy Issuing Registered Will Copy	Approved	Estate Officer 2	
<input type="checkbox"/> WILL24092300002		Semi Qio CUST24092300002	Port Suva 23 Sep 2024	Complete Will Application Application Completed	Approved	Estate Officer 1	
<input type="checkbox"/> WILL24092300001		Boopathi Ganesan CUST24042300001	Port Suva 23 Sep 2024	Prepare Will Draft Preparing Will Draft	Approved	Manager Estate Trust Officer	
<input type="checkbox"/> WILL24092100002		Boopathi Ganesan CUST24041000001	Port Suva 21 Sep 2024	Provide Requirement List Application Cancelled	Approved	Estate Officer 2	
<input type="checkbox"/> WILL24092100002		NA	Port Suva 20 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 2	
<input type="checkbox"/> WILL24092100001		567567 5 CUST23122700002	Port Suva 21 Sep 2024	Provide Requirement List Application Cancelled	Approved	Estate Officer 1	
<input type="checkbox"/> WILL2409200002		a a CUST24081200004	Port Suva 20 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 2	
<input type="checkbox"/> WILL24092000001		Dumbledore Voldermort CUST24082900006	Port Suva 20 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 1	
<input type="checkbox"/> WILL24091900004		Anjali Kumari Reddy CUST24091800002	Port Suva 19 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 2	



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Search Criteria:

1. Click **"Search"** button, Will Application Search pop up will be displayed, wherein the user can search based on the given parameters.
2. Enter/Select any of the fields among Will Search criteria.

Will App Ref No	File No	Applicant Name	Applied Branch	Application Stage	Action Status	Assigned Officer
WILL2409200001	Dumbledore Voldermort CUST24082900006	Port Suva	Complete Will Application	Approved	Estate Officer 1	
WILL24091900004	Anjali Kumari Reddy CUST24091800002	Port Suva	Complete Will Application	Approved	Estate Officer 2	

3. Click the **"Search"** icon on top of the pop up to get corresponding results.
4. Click the **"Clear"** icon next to the search icon to clear all the entered/Selected values in the fields.
5. Click the **Close(X)** icon to close the Search Popup.

My Diary

My Task

Files

CRM

Will

Will Application

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<input type="checkbox"/>	Will App Ref No	File No	Applicant Name Applicant CRM No	Applied Branch Applied Date	Application Stage Application Status	Action Status	Assigned Officer	<div></div>
<input type="checkbox"/>	WILL24092400001		David Collin Griffith CUST24080500002	Port Suva 24 Sep 2024	Provide Requirement List Providing Requirement List	Approved	Estate Officer 2	<div></div>
<input checked="" type="checkbox"/>	WILL24092300005		Anjali Kumari Reddy CUST24091800002	Port Suva 23 Sep 2024	Update Registered Will in the Records Updating Registered Will in the Records	Approved	Estate Officer 1	<div></div>
<input type="checkbox"/>	WILL24092300004		Semi Qio CUST24092300002	Port Suva 23 Sep 2024	Prepare Will Draft Preparing Will Draft	Pending Approval	Estate Officer 2	<div>Open</div>
<input checked="" type="checkbox"/>	WILL24092300003		Peter Andrew Williams CUST24092300004	Port Suva 23 Sep 2024	Issue Registered Will Copy Issuing Registered Will Copy	Approved	Estate Officer 2	<div></div>
<input type="checkbox"/>	WILL24092300002		Semi Qio CUST24092300002	Port Suva 23 Sep 2024	Complete Will Application Application Completed	Approved	Estate Officer 1	<div></div>
<input type="checkbox"/>	WILL24092300001		Boopathi Ganesan CUST24042300001	Port Suva 23 Sep 2024	Prepare Will Draft Preparing Will Draft	Approved	Manager Estate Trust Officer	<div></div>
<input type="checkbox"/>	WILL24092100002		Boopathi Ganesan CUST24041000001	Port Suva 21 Sep 2024	Provide Requirement List Application Cancelled	Approved	Estate Officer 2	<div></div>
<input type="checkbox"/>	WILL24092100002		NA	Port Suva 20 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 2	<div></div>
<input type="checkbox"/>	WILL24092100001		567567 5 CUST23122700002	Port Suva 21 Sep 2024	Provide Requirement List Application Cancelled	Approved	Estate Officer 1	<div></div>
<input type="checkbox"/>	WILL2409200002		a a CUST24081200004	Port Suva 20 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 2	<div></div>
<input type="checkbox"/>	WILL24092000001		Dumbledore Voldermort CUST24082900006	Port Suva 20 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 1	<div></div>
<input type="checkbox"/>	WILL24091900004		Anjali Kumari Reddy CUST24091800002	Port Suva 19 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 2	<div></div>



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- Click the **“Open”** icon under the action column directly or check the checkbox near the Will Application number and click the **“Open”** icon in the table header to navigate to the Will Application detail screen.
- If user want to open multiple details then click select all checkboxes in the table header and click the **“Open”** icon in the table header.
- Select the page number to directly go to that particular page.
- Click the **“Next”** button on the top right corner to navigate to the next page.
- Click the **“Previous”** button on the top right corner to navigate to the previous page.
- Select the Records count on the top right corner to show the required number of records per page.

Create New Will Application:

- To create a New Will application select the **Lead No** from the Drop-down list and Click **Add** Button.

The screenshot displays the 'Will Application' module interface. On the left is a sidebar with navigation icons for My Diary, My Task, Files, CRM, and Will. The main area features a table with columns: Will App Ref No, File No, Applicant Name, Applied Branch, Application Stage, Application Status, and Action Status. A dropdown menu is open for the 'Lead No' column, showing a list of lead numbers with 'LEAD24092500001' selected and marked with a checkmark. The table contains 18 entries, with the first few rows showing applications for David Collin Griffith, Anjali Kumari Reddy, and Semi Qio.

Will App Ref No	File No	Applicant Name	Applied Branch	Application Stage	Application Status	Action Status
<input type="checkbox"/> WILL24092400001		David Collin Griffith CUST24080500002	Port Suva 24 Sep 2024	Provide Requirement List Providing Requirement List	Approved	Est
<input type="checkbox"/> WILL24092300005		Anjali Kumari Reddy CUST24091800002	Port Suva 23 Sep 2024	Update Registered Will in the Records Updating Registered Will in the Records	Approved	Est
<input type="checkbox"/> WILL24092300004		Semi Qio CUST24092300002	Port Suva 23 Sep 2024	Prepare Will Draft Preparing Will Draft	Pending Approval	Est
<input type="checkbox"/> WILL24092300003		Peter Andrew Williams CUST24092300004	Port Suva 23 Sep 2024	Issue Registered Will Copy Issuing Registered Will Copy	Approved	Est
<input type="checkbox"/> WILL24092300002		Semi Qio CUST24092300002	Port Suva 23 Sep 2024	Complete Will Application Application Completed	Approved	Est
<input type="checkbox"/> WILL24092300001		Boopathi Ganesan CUST24042300001	Port Suva 23 Sep 2024	Prepare Will Draft Preparing Will Draft	Approved	Manager Estate Trust Officer
<input type="checkbox"/> WILL24092100002		Boopathi Ganesan CUST24041000001	Port Suva 21 Sep 2024	Provide Requirement List Application Cancelled	Approved	Estate Officer 2
<input type="checkbox"/> WILL24092100002		NA	Port Suva 20 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 2
<input type="checkbox"/> WILL24092100001		567567 5 CUST23122700002	Port Suva 21 Sep 2024	Provide Requirement List Application Cancelled	Approved	Estate Officer 1
<input type="checkbox"/> WILL2409200002		a a CUST24081200004	Port Suva 20 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 2
<input type="checkbox"/> WILL2409200001		Dumbledore Voldermort CUST24082900006	Port Suva 20 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 1
<input type="checkbox"/> WILL24091900004		Anjali Kumari Reddy CUST24091800002	Port Suva 19 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 2

- “Will Application Add New”** Popup will display with the following details Lead Ref No , Application Stage , Application Status , Action Status , Applied By , Applied Date , Applied Branch.



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Will Application

Showing: 1 - 18 of 18 Entries | 25 | < 1 > LEAD24092500001

Will App Ref No	File No	Applicant Name Applicant CRM No	Applied Branch Applied Date	Application Stage Application Status	Action Status	Assigned Officer
WILL24092500001		David Collin Griffith	Port Suva	Provide Requirement List		Estate Officer 1

Will Application > Add New

Lead Ref No	Application Stage	Application Status
LEAD24092500001	Provide Requirement List	Providing Requirement List
Action Status	Applied By	Applied Date
Approved	Estate Officer 1	25 Sep 2024
Applied Branch		
Port Suva		

WILL24092100002	NA	Port Suva	20 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 2
WILL24092100001	567567 5 CUST23122700002	Port Suva	21 Sep 2024	Provide Requirement List Application Cancelled	Approved	Estate Officer 1
WILL2409200002	a a CUST24081200004	Port Suva	20 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 2
WILL24092000001	Dumbledore Voldermort CUST24082900006	Port Suva	20 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 1
WILL24091900004	Anjali Kumari Reddy CUST24091800002	Port Suva	19 Sep 2024	Complete Will Application Completing Application	Approved	Estate Officer 2

14. Click the **“Save”** button to navigate to the Will Application Details Screen.
15. Click the **“Close”** button to close the Will Application Add New pop-up.

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