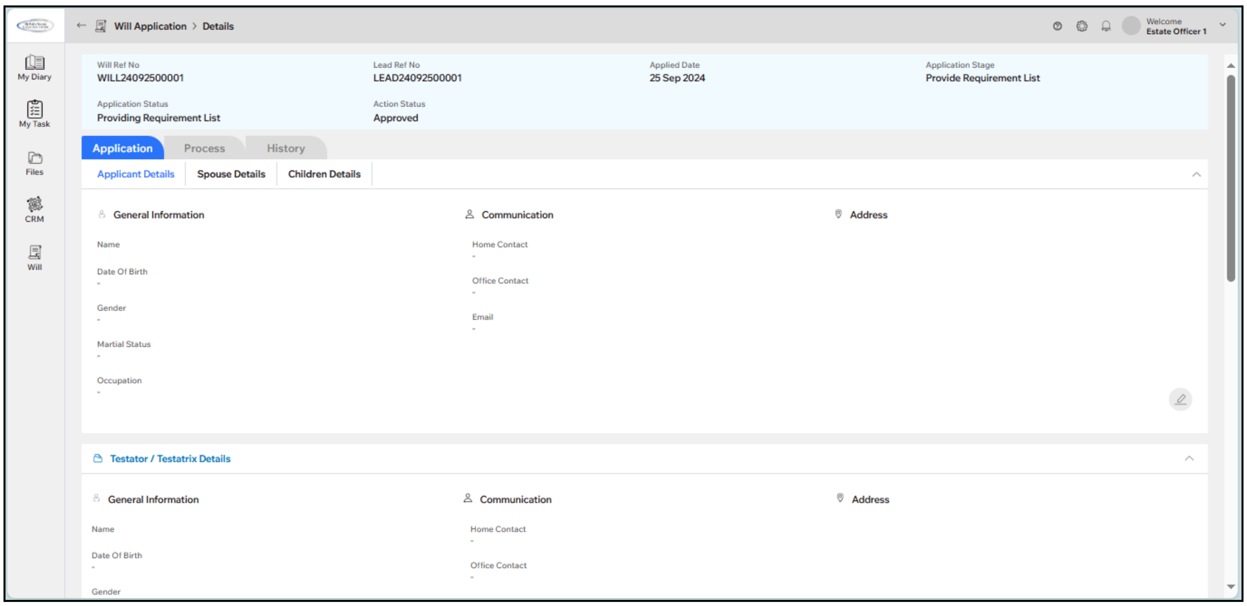
Will Application Detail

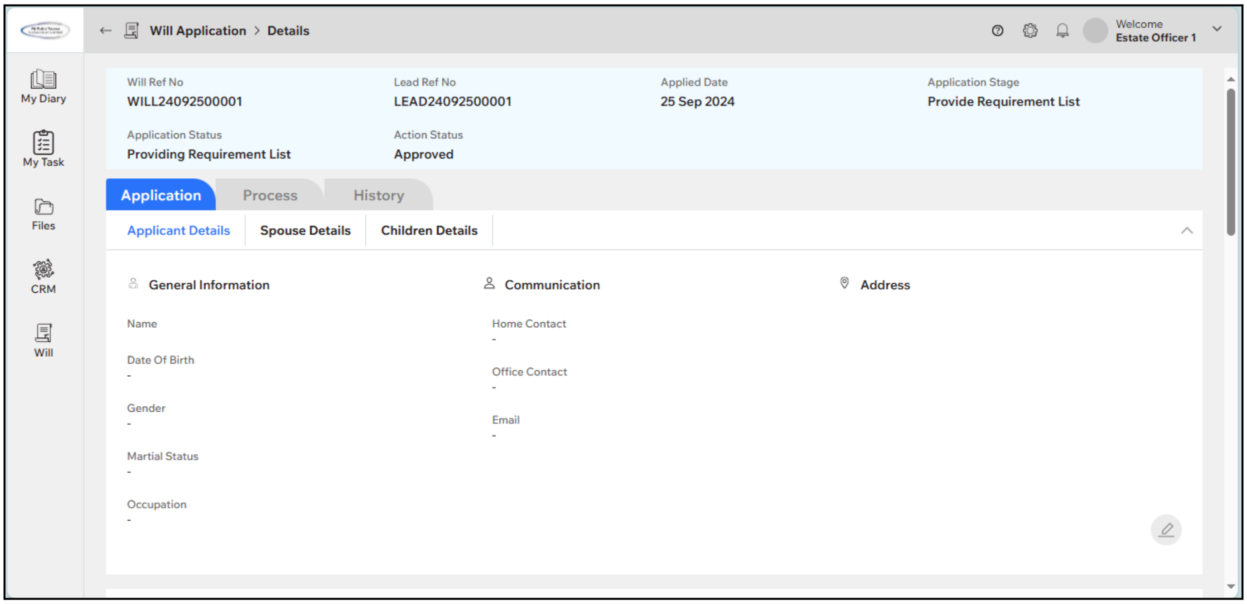
User Roles: Estate Officer, Manager, Register Officer, Accounts Officer

Overview:
This screen allows user to view, create, and process Will Applications. The system will display the Will Application's parent details in the header.



Application Tab:

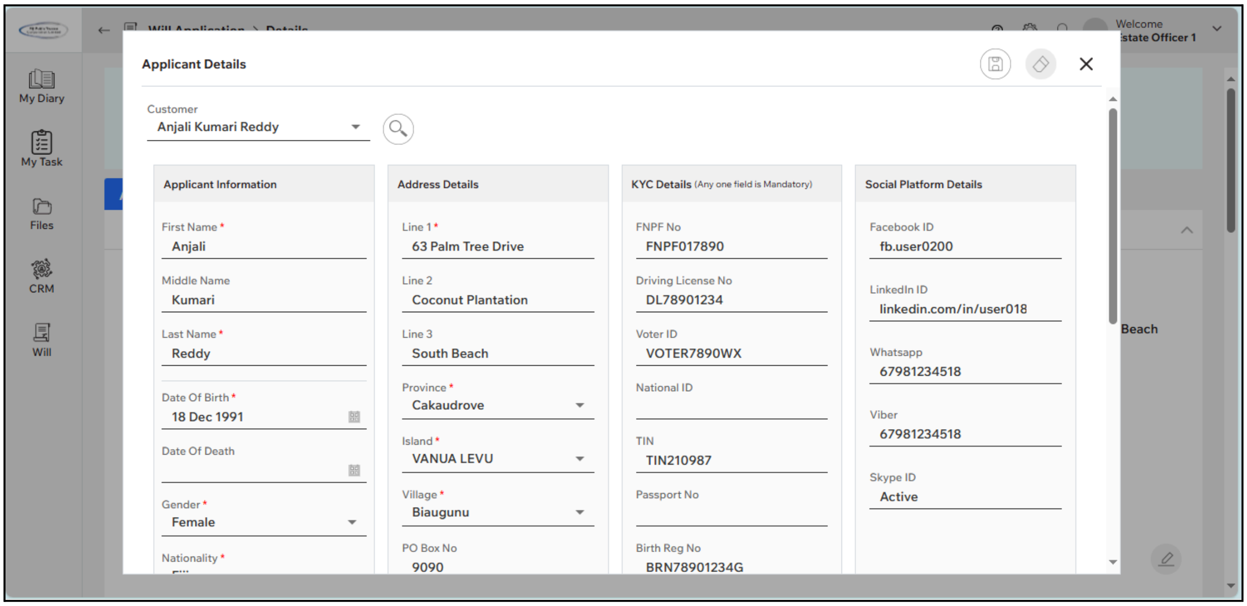
This section contains essential information, such as General Information , Communication , Address who initiated the application.



Applicant Details Section :

Adding a Applicant Details:

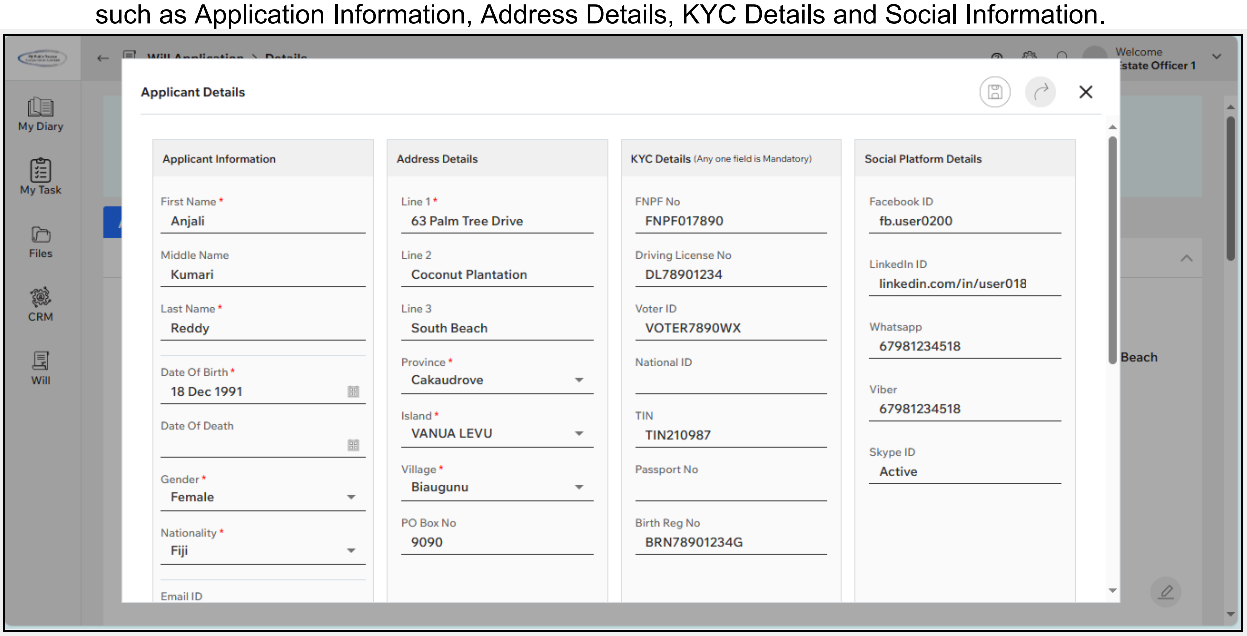
1. Click the **Edit** button to enter “**Applicant Details**”.
2. An **Applicant Details** popup will appear.
3. Choose the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new Applicant details such as Application Information, Address Details, KYC Details and Social Information.



4. Click the **Save** button to save the **Applicant details**.
5. Click the **Clear** button to erase the entered or selected details.
6. Click the **Close** button to exit the popup window.

Editing Applicant Details:

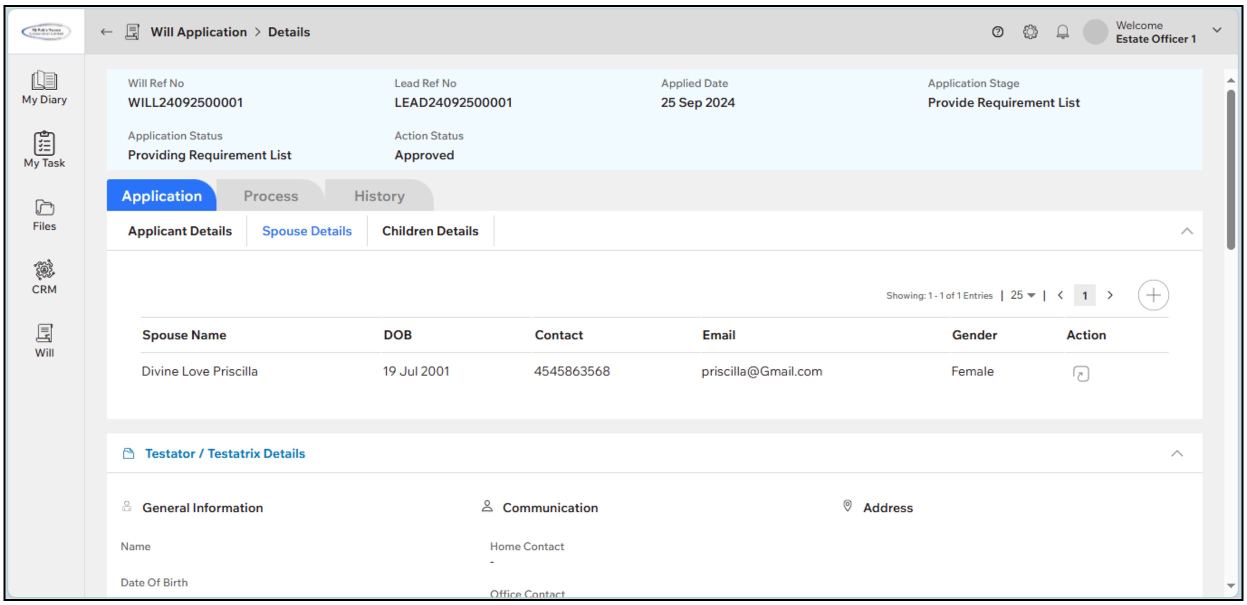
7. Click On **Edit** button to open **Edit Applicant Details** Popup.
8. Change the Customer by Choosing the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new Applicant details such as Application Information, Address Details, KYC Details and Social Information.



9. Click the **Update** button to save the changes.
10. Click the **Refresh** button to refresh all the entered previous values.
11. Click the **Close** button to exit the popup window.

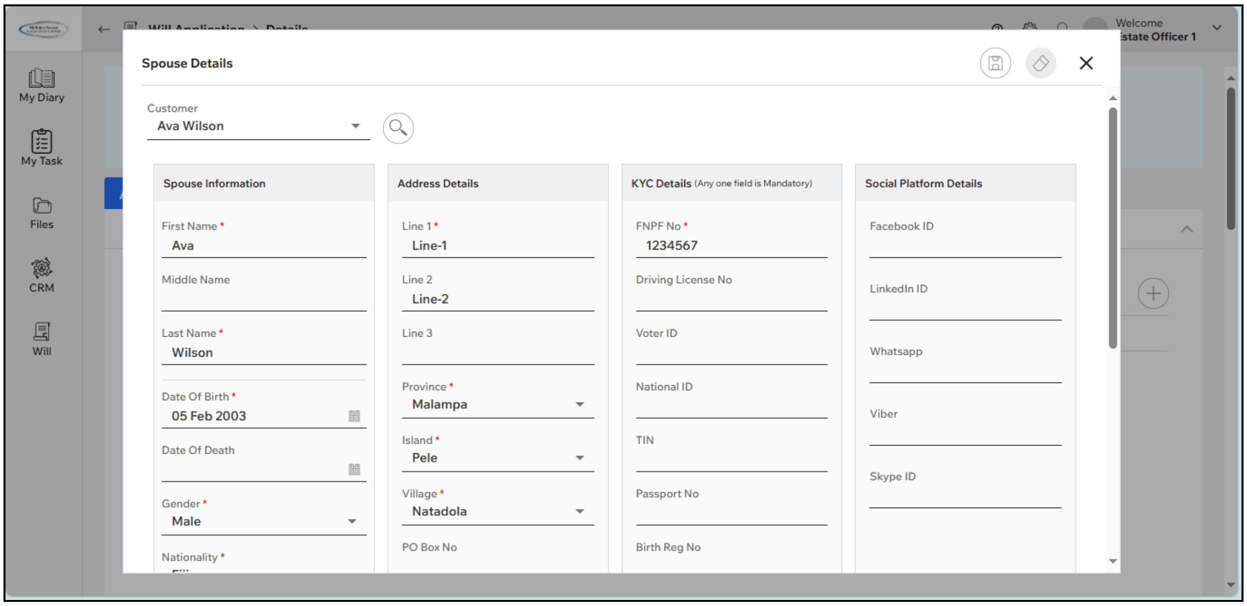
Spouse Details Section :

Select the Spouse Tab to proceed to the Spouse Details Tab.



Adding a Spouse Details:

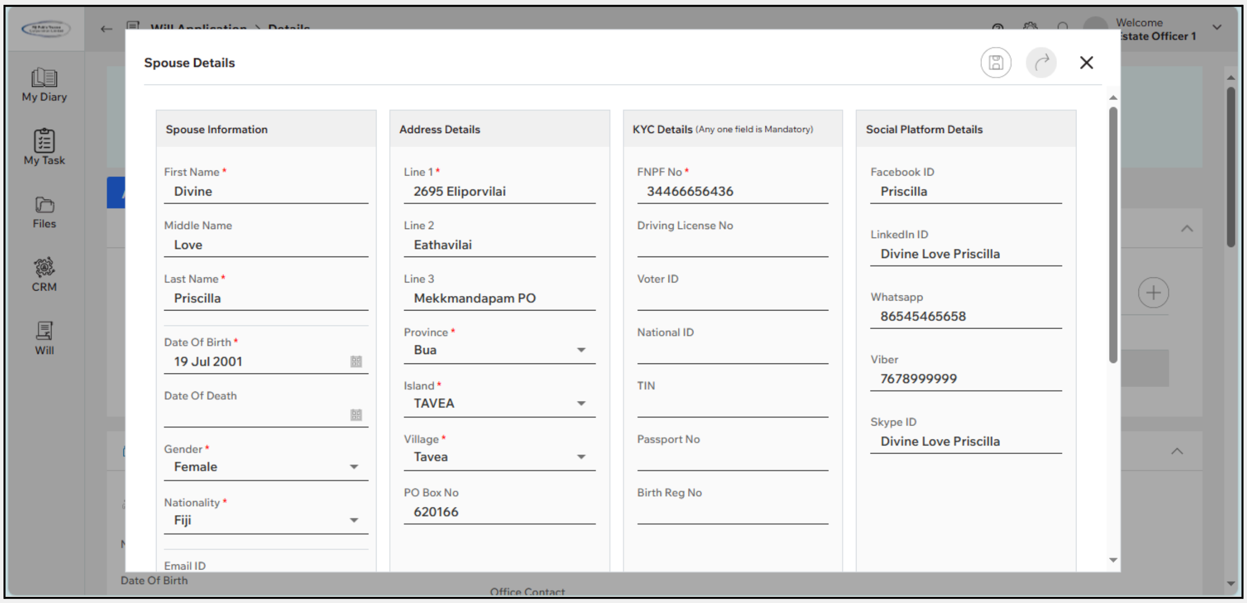
1. Click the **Add** button to enter Spouse details.
2. A **Spouse Details** popup will appear.
3. Choose the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new Spouse details.



4. Click the **Save** button to save the **Spouse details**.
5. Click the **Clear** button to erase the entered or selected details.
6. Click the **Close** button to exit the popup window.

Editing Spouse Details:

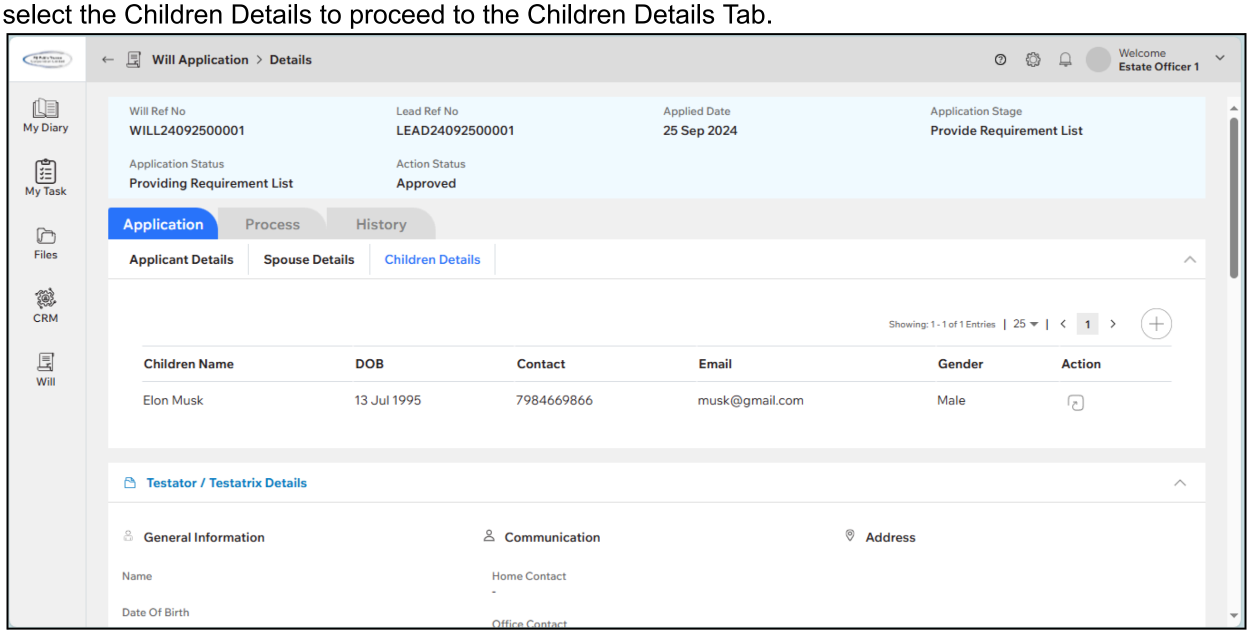
1. Click on the “Open” button and navigate to the “**Edit Spouse Details”** pop-up screen.
2. Click on the “Edit” button to edit the **Spouse Details**.
3. Change the Customer by Choosing the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new Applicant details such as Application Information, Address Details, KYC Details and Social Information.



4. Click the **Update** button to save the changes.
5. Click the **Refresh** button to refresh all the entered previous values.
6. Click the **Close** button to exit the popup window.

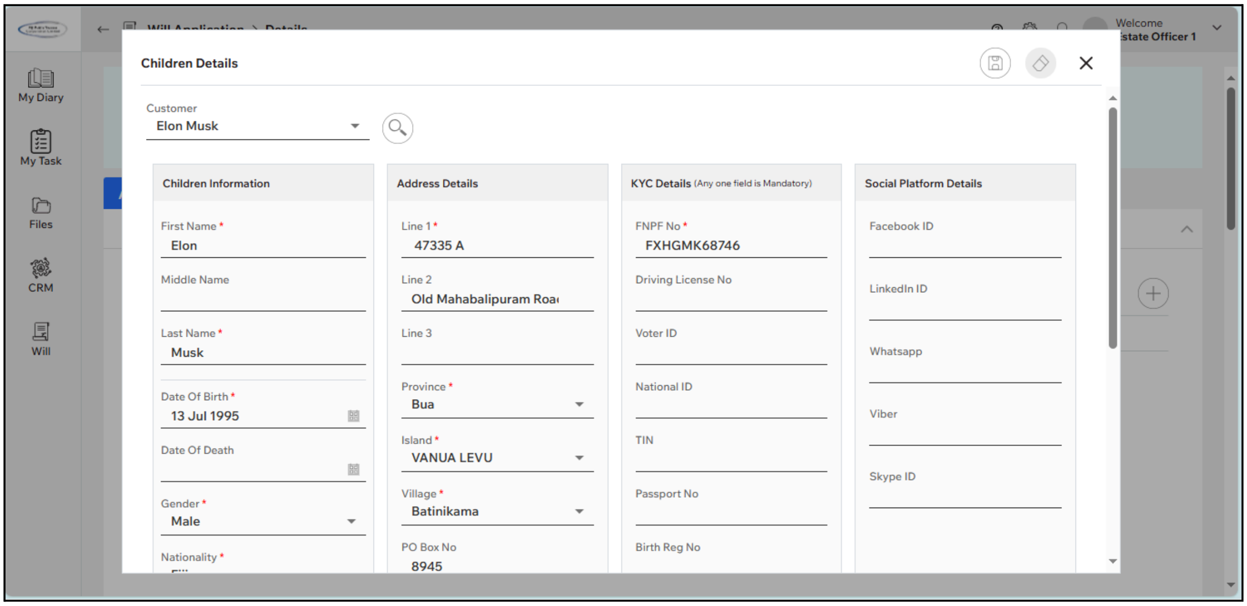
Children Details Section :

select the Children Details to proceed to the Children Details Tab.



Adding a Children Details:

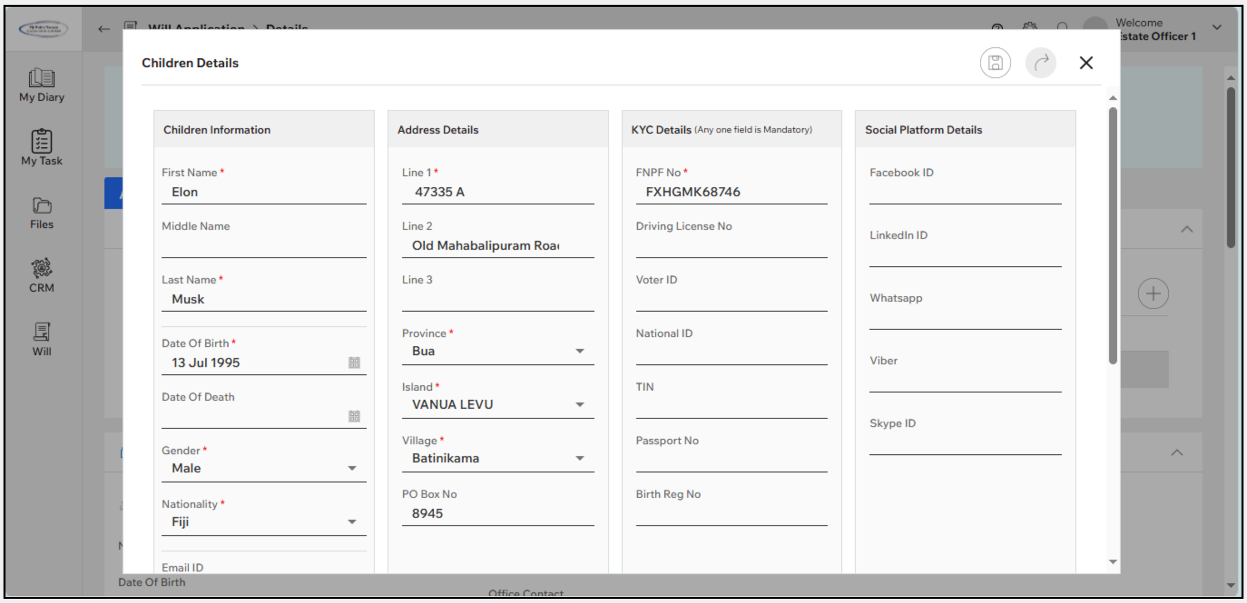
1. Click the **Add** button to enter Children details.
2. A **Children Details** popup will appear.
3. Choose the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new Children details.



4. Click the **Save** button to save the **Children details**.
5. Click the **Clear** button to erase the entered or selected details.
6. Click the **Close** button to exit the popup window.

Editing Children Details:

1. Click on the "Open" button and navigate to the "**Edit Children Details"** pop-up screen.
2. Click on the "Edit" button to edit the **Children Details**.
3. Change the Customer by Choosing the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new Applicant details such as Application Information, Address Details, KYC Details and Social Information.

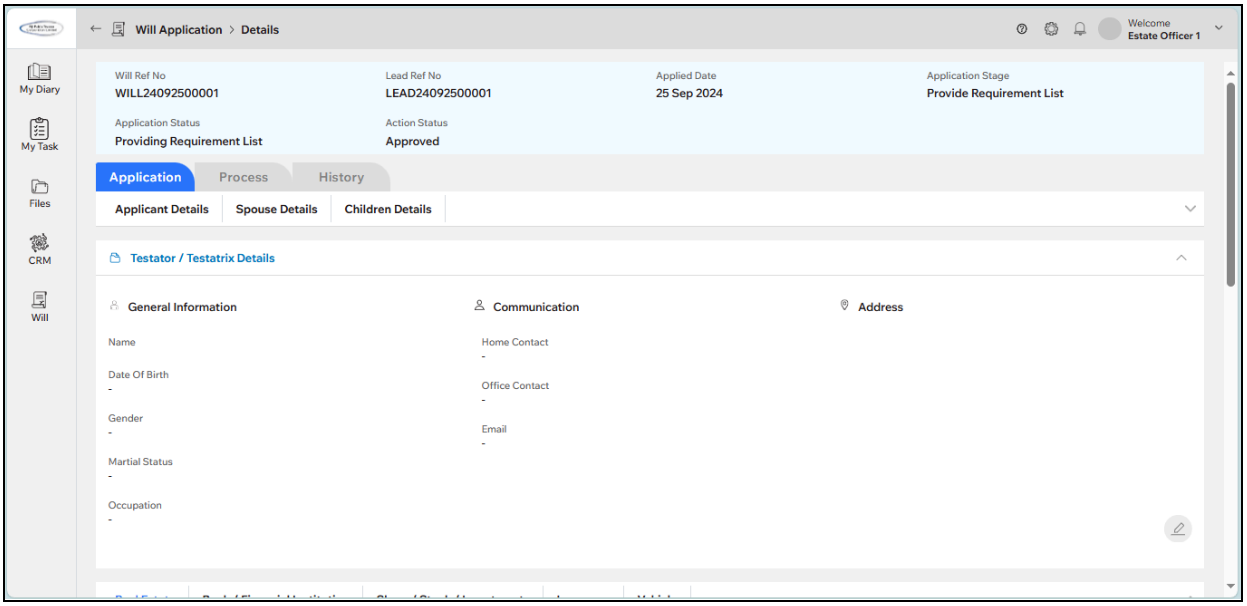


4. Click the **Update** button to save the changes.
5. Click the **Refresh** button to refresh all the entered previous values.
6. Click the **Close** button to exit the popup window.

Testator / Testatrix Section :

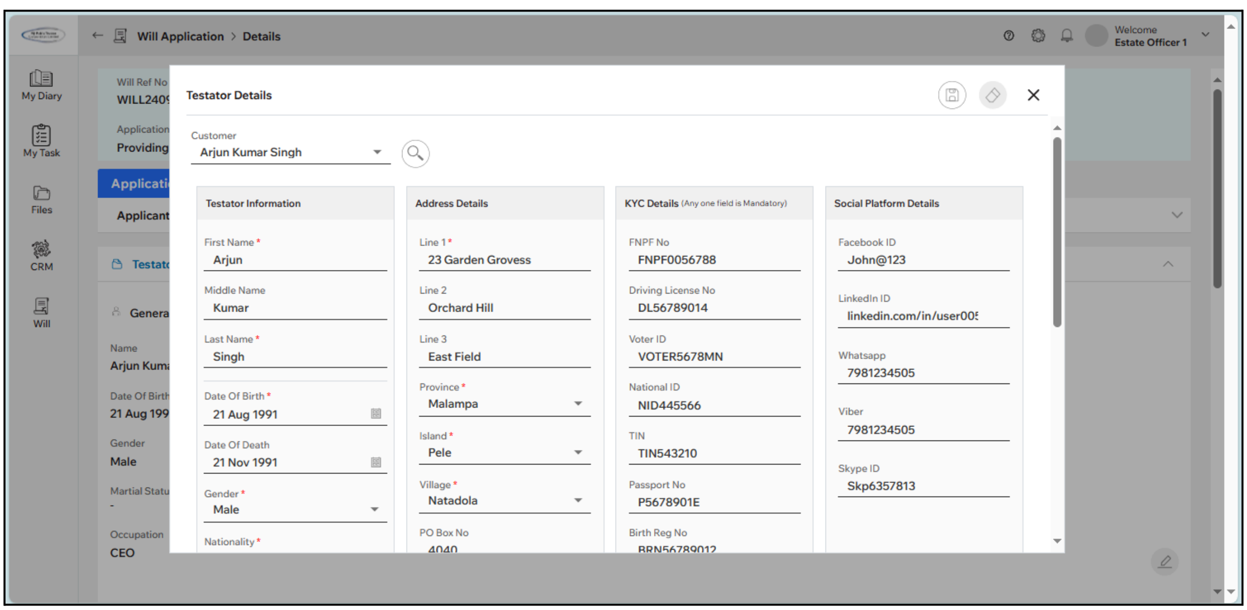
Select the **Testator Details** to proceed to the **Testator Details** Tab.

This section contains essential information, such as General Information , Communication , Address who initiated the application.



Adding a Testator Details:

1. Click the **Edit** button to enter “**Testator Details**”.
2. A **Testator Details** popup will appear.
3. Choose the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new **Testator Details**.

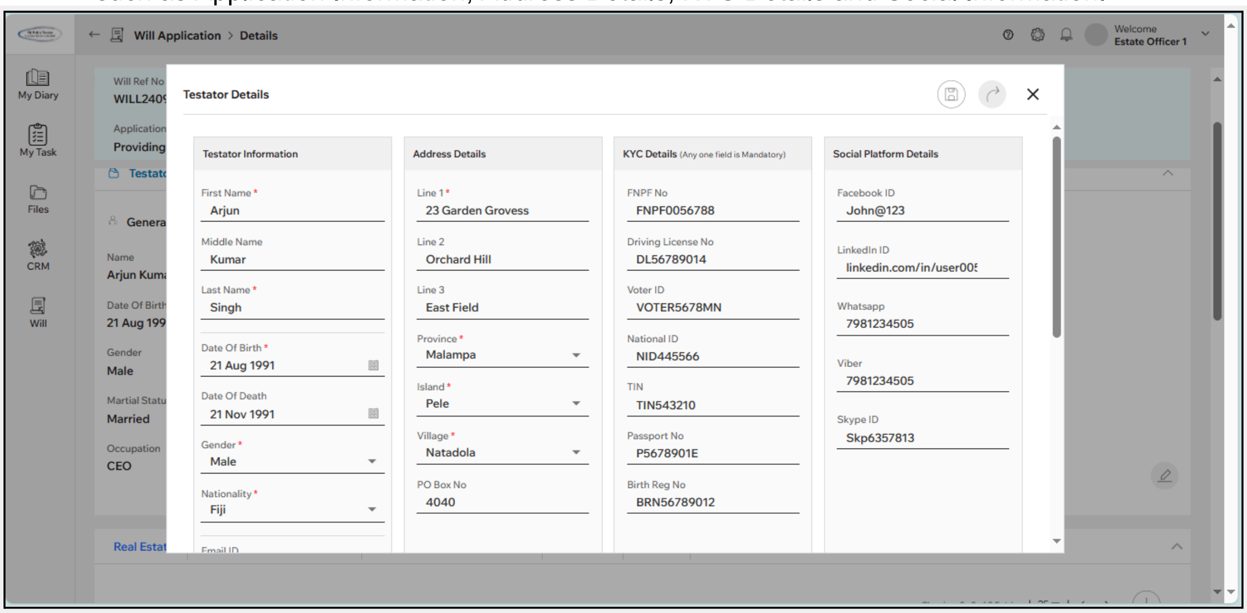


4. Click the **Save** button to save the **Testator Details**.
5. Click the **Clear** button to erase the entered or selected details.

6. Click the **Close** button to exit the popup window.

Editing Testator Details:

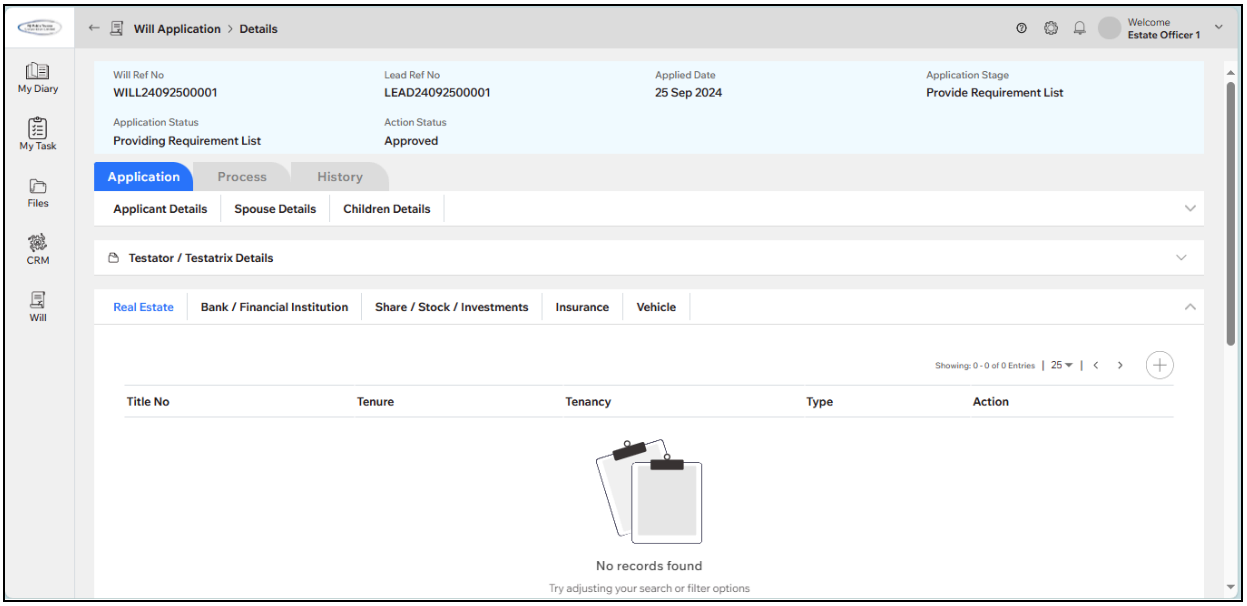
7. Click on the "**Edit**" button to edit the **Testator Details** and navigate to the "**Edit Testator Details"** pop-up screen.
8. Click on the "**Edit**" button in **Edit Testator Details pop-up** screen**.**
9. Change the Customer by Choosing the customer from the **Customer Drop-down List**, search for an existing customer by clicking the **Search** option, or manually enter new Applicant details such as Application Information, Address Details, KYC Details and Social Information.



10. Click the **Update** button to save the changes.
11. Click the **Refresh** button to refresh all the entered previous values.
12. Click the **Close** button to exit the popup window.

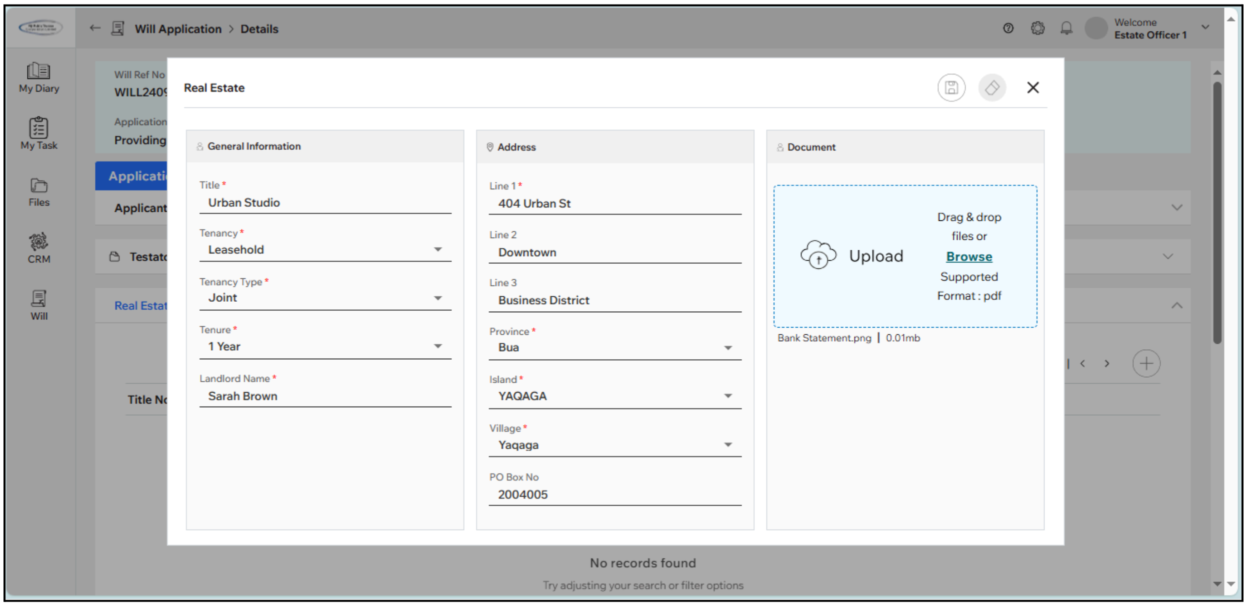
Real Estate Section :

Select the **Real Estate** to proceed to the **Real Estate** Tab.



Adding a Real Estate :

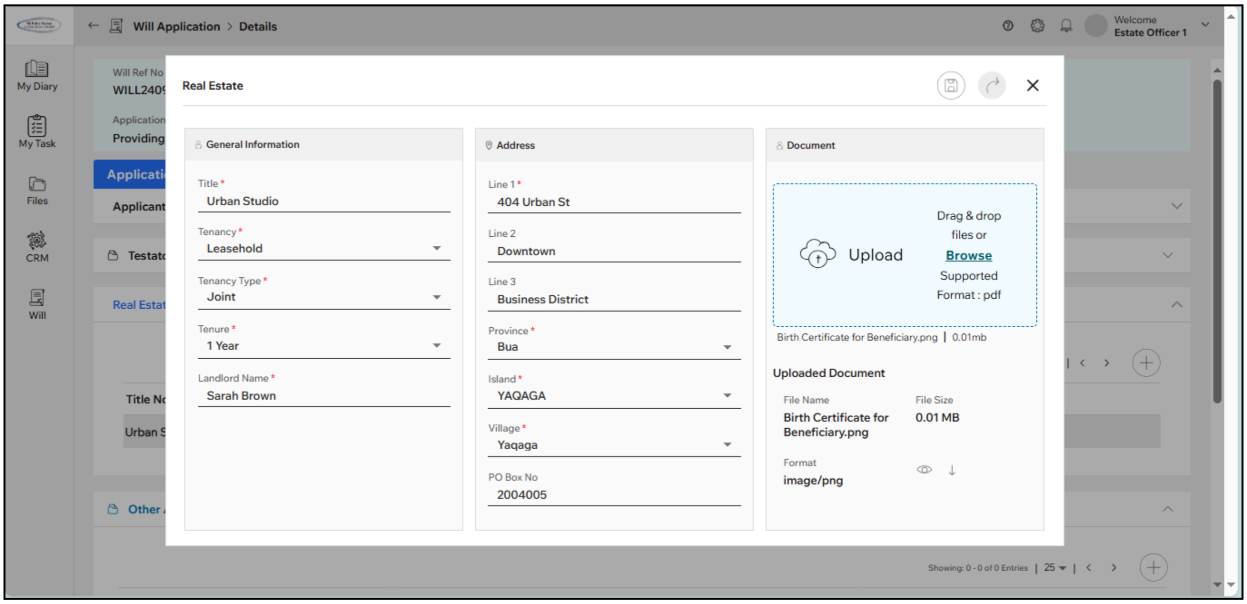
1. Click the **Add** button to enter **Real Estate**.
2. A **Real Estate** popup will appear.
3. This section contains essential information, such as General Information , Address & Additional Information.
4. Enter / Select Title , Tenancy , Tenancy Type , Tenure , Landlord Name Under **General Information.**
5. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address.**
6. Click on the **Browse** button and select the desired file from your local system under **Additional Information.**
7. The selected document will appear below the browse field.
8. Click the **Upload** icon to add the document to the document grid.



9. Click the **Save** button to save **Real Estate**.
10. Click the **Clear** button to remove the entered or selected details.
11. Click the **Close** button to close the popup window.

Editing Real Estate:

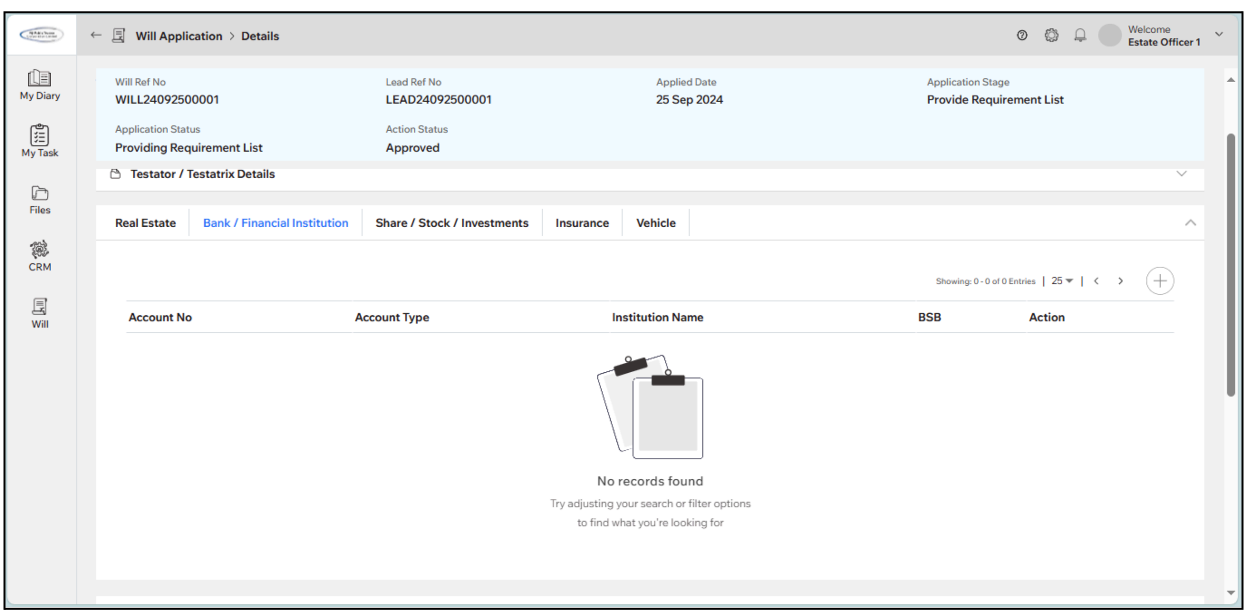
7. Click on the “Open” button and navigate to the “**Edit Real Estate”** pop-up screen.
8. Enter / Select Title , Tenancy , Tenancy Type , Tenure , Landlord Name Under **General Information.**Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address.**
9. Click on the **Browse** button and select the desired file from your local system under **Additional Information.**
10. The selected document will appear below the browse field.
11. Click the **Upload** icon to add the document to the document grid.
12. In the **Action** column, the following options will be available for each document: **Download**: To download the document. **View**: To view the document. **Delete**: To delete the document.



13. Click the **Update** button to save the changes.
14. Click the **Refresh** button to refresh all the entered previous values.
15. Click the **Close** button to exit the popup window.

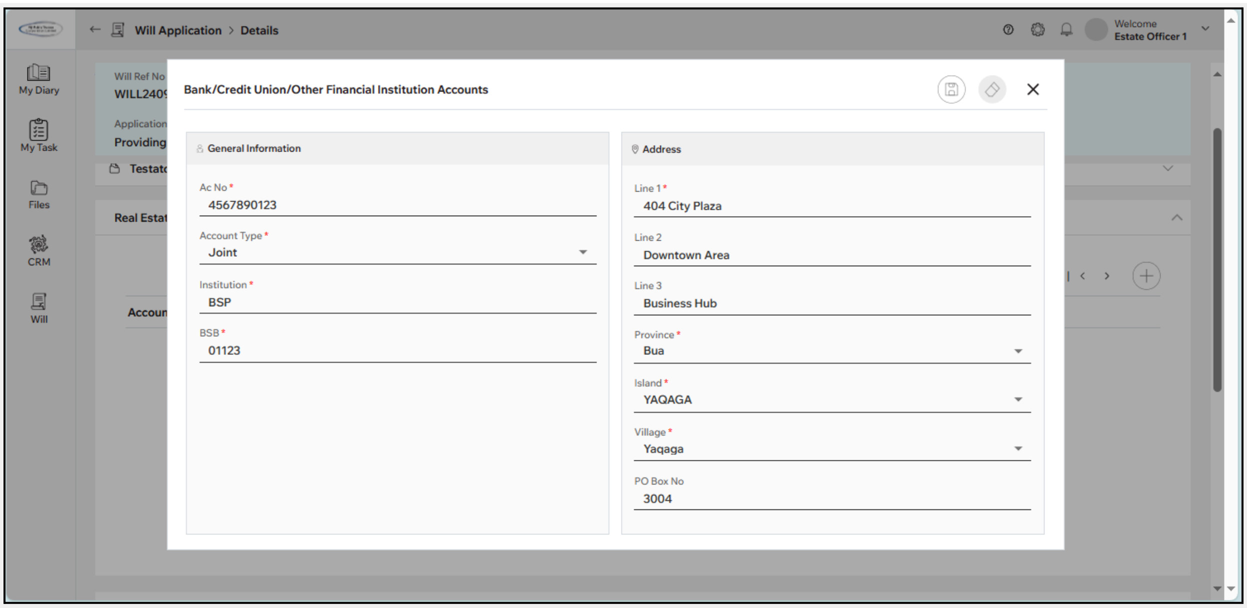
Bank / Financial Institution Section :

To proceed to the **Bank / Financial Institution** Tab, select the **Bank / Financial Institution.**



Adding a Bank / Financial Institution :

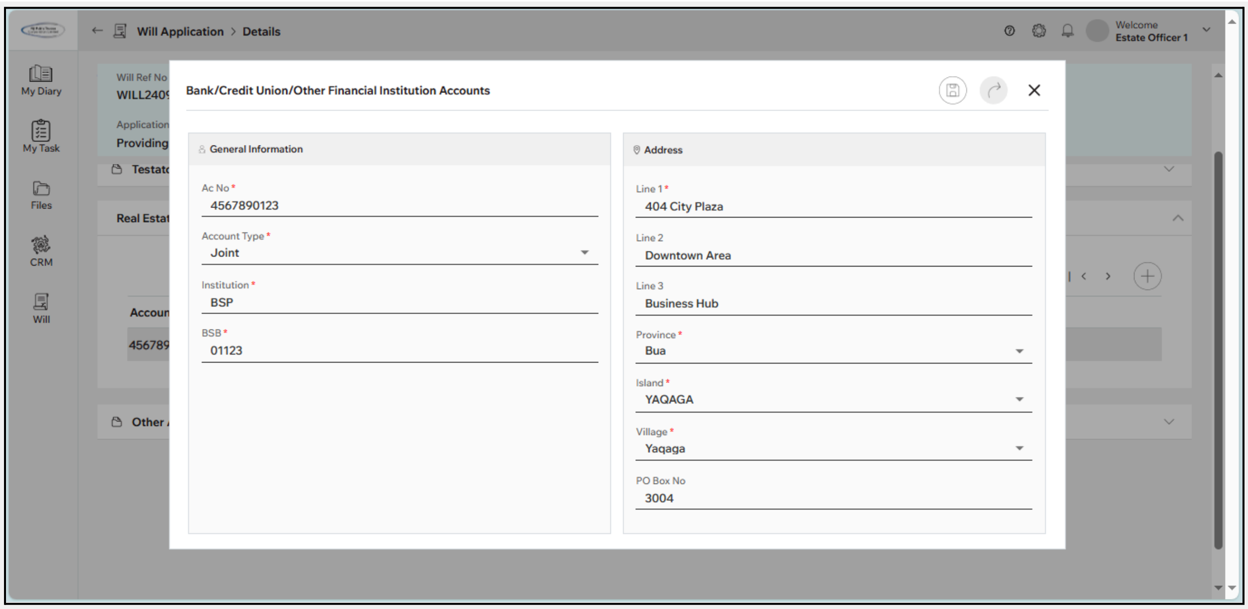
1. Click the **Add** button to enter a **Bank / Financial Institution**.
2. A **Bank/Credit Union/Other Financial Institution Accounts** popup will appear.
3. This section contains essential information, such as General Information , Address & Additional Information.
4. Enter / Select Institution , Ac No , BSB , Account Type Under **General Information.**
5. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address.**



6. Click the **Save** button to save **Bank / Financial Institution**.
7. Click the **Clear** button to remove the entered or selected details.
8. Click the **Close** button to close the popup window.

Editing Bank / Financial Institution:

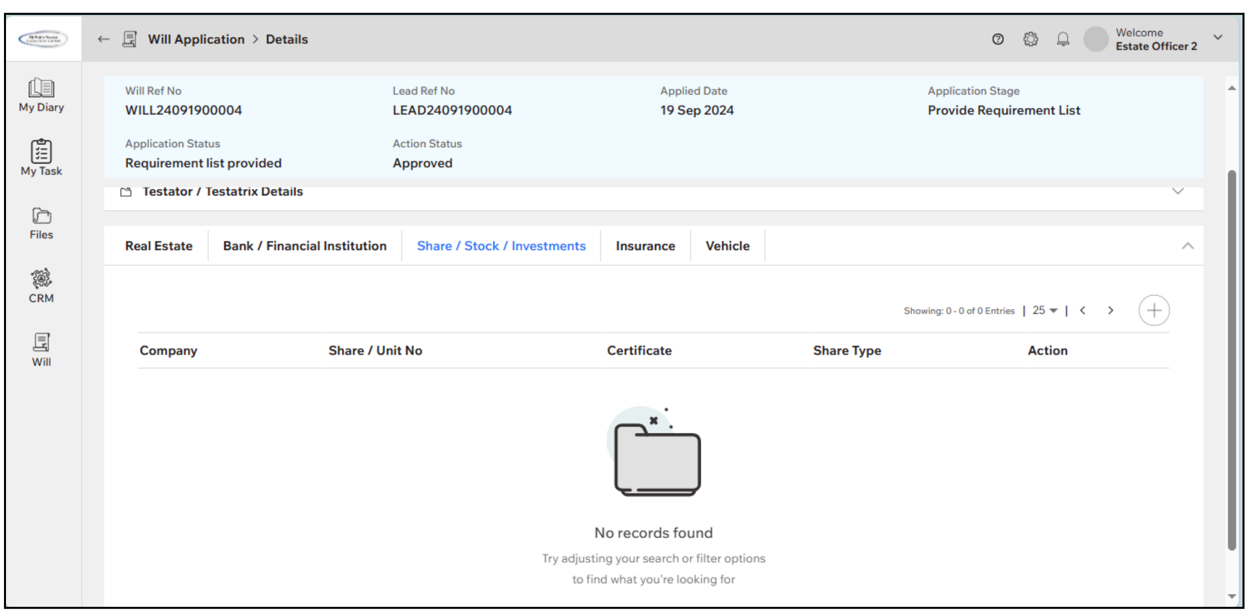
16. Click on the “Open” button and navigate to the “**Edit Bank/Credit Union/Other Financial Institution Accounts”** pop-up screen.
17. Enter / Select Institution , Ac No , BSB , Account Type Under **General Information.**
18. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address.**



19. Click the **Update** button to save the changes.
20. Click the **Refresh** button to refresh all the entered previous values.
21. Click the **Close** button to exit the popup window.

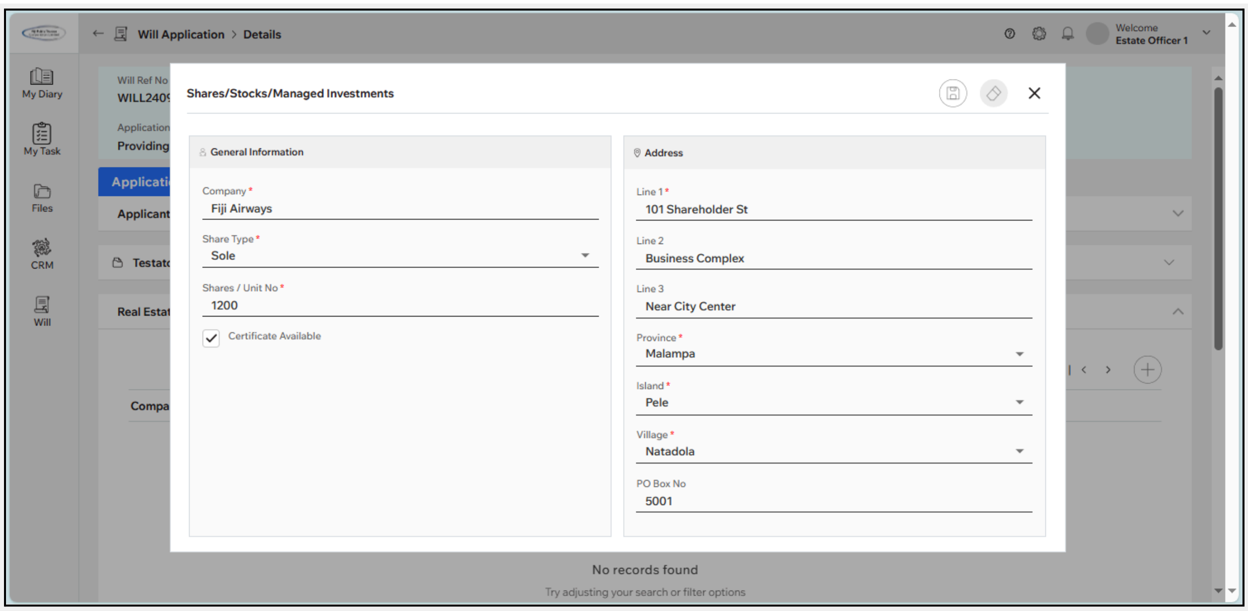
Share / Stock / Investments Section :

To proceed to the **Share / Stock / Investments** Tab, select the **Share / Stock / Investments**.



Adding a Share / Stock / Investments :

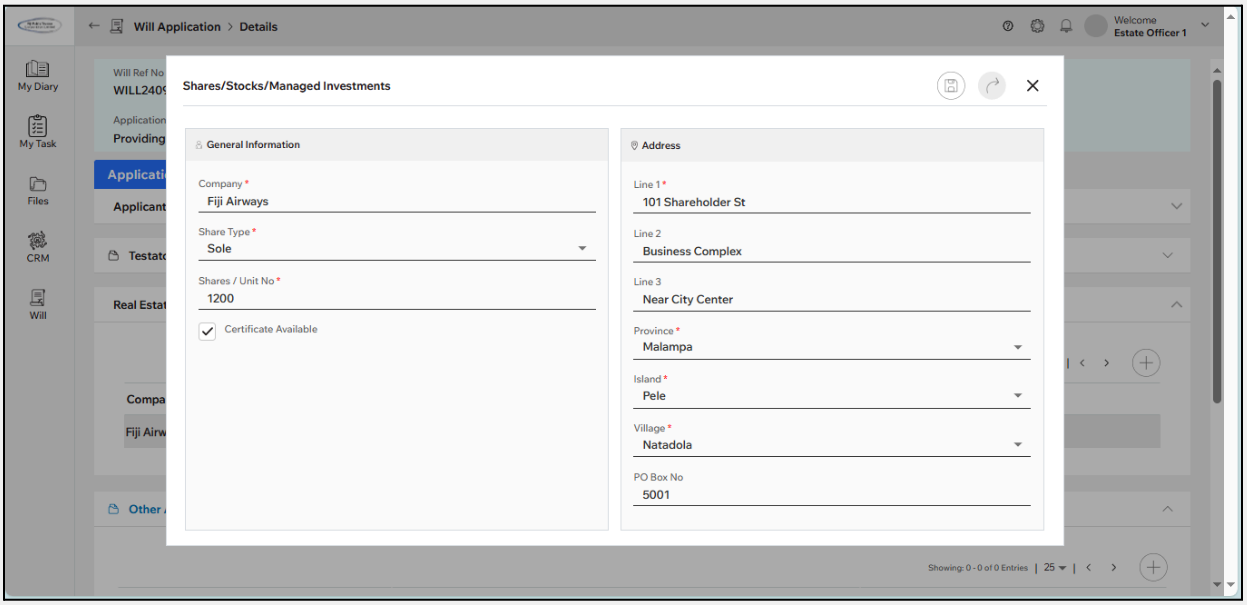
1. Click the **Add** button to enter **Share / Stock / Investments**.
2. A **Shares/Stocks/Managed Investments** popup will appear.
3. This section contains essential information, such as General Information , Address & Additional Information.
4. Enter / Select Company, Shares / Unit No, Certificate Available , Share Type Under **General Information.**
5. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address.**



6. Click the **Save** button to save **Shares/Stocks/Managed Investments**.
7. Click the **Clear** button to remove the entered or selected details.
8. Click the **Close** button to close the popup window.

Editing a Share / Stock / Investments :

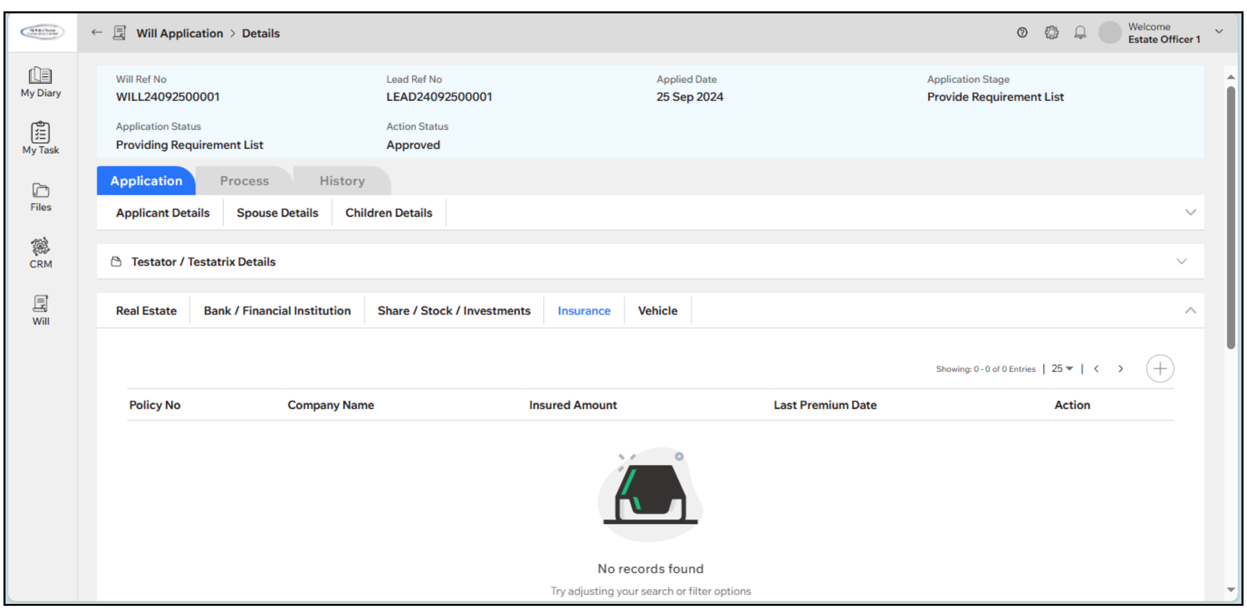
9. Click on the “Open” button and navigate to the “**Edit Shares/Stocks/Managed Investments”** pop-up screen.
10. Click on the “Edit” button to edit the **Shares/Stocks/Managed Investments.**
11. Enter / Select Company, Shares / Unit No, Certificate Available , Share Type Under **General Information.**
12. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address.**



13. Click the **Update** button to save the changes.
14. Click the **Refresh** button to refresh all the entered previous values.
15. Click the **Close** button to exit the popup window.

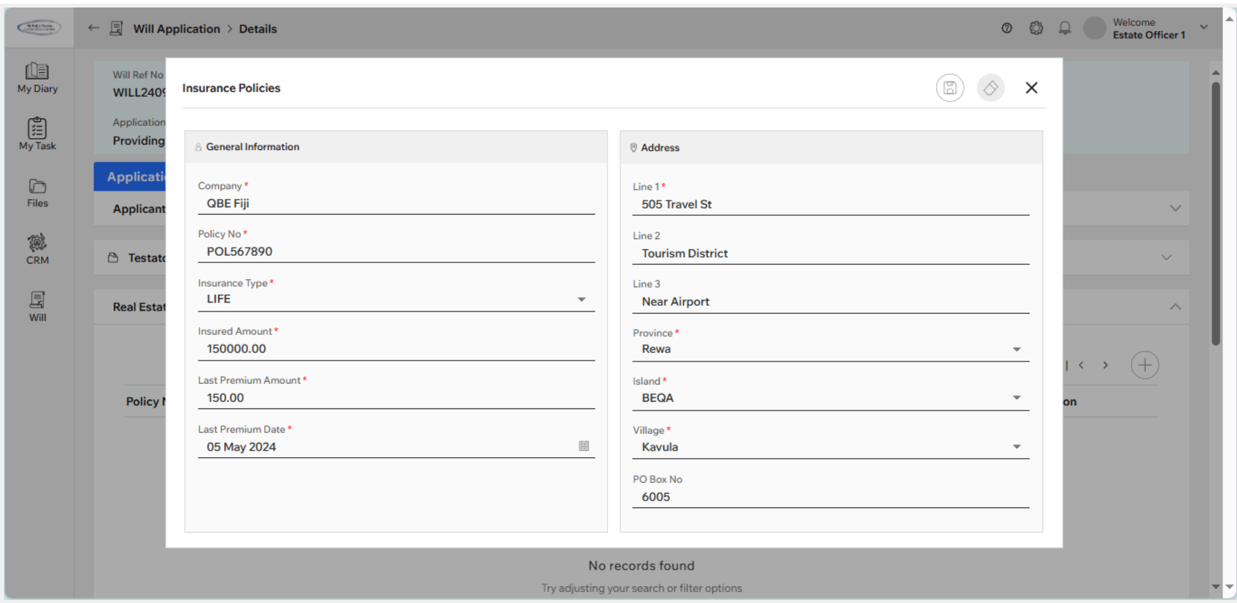
Insurance Section :

To proceed to the **Insurance** Tab, select the **Insurance**.



Adding a Insurance Policies :

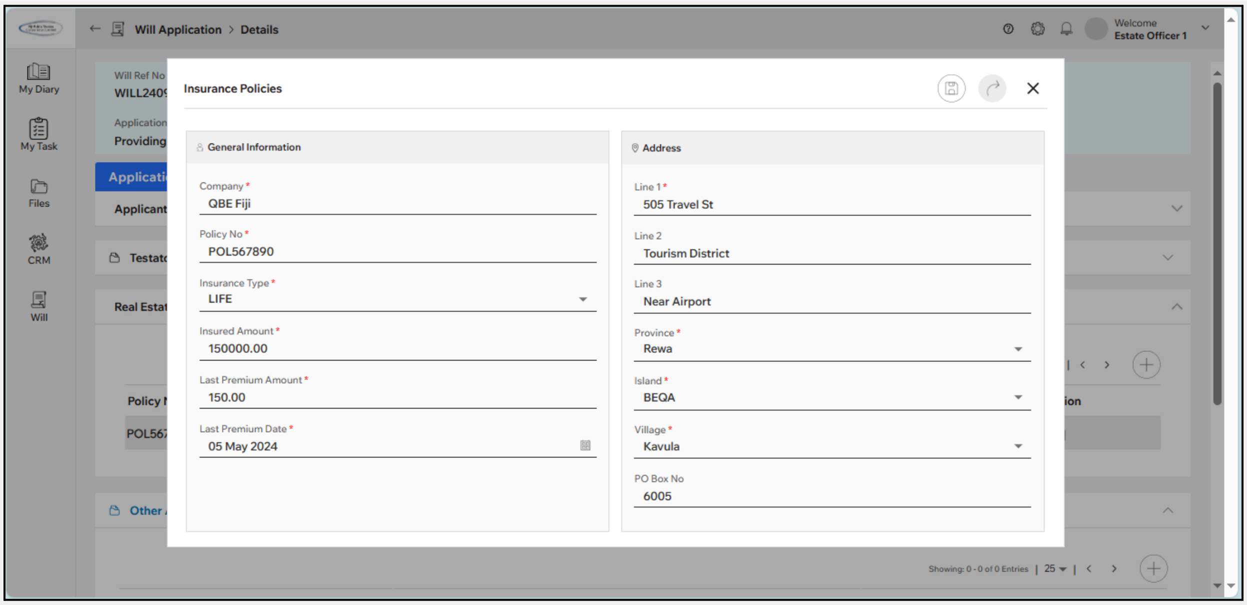
1. Click the **Add** button to enter **Insurance Policies**.
2. An **Insurance Policies** popup will appear.
3. This section contains essential information, such as General Information , Address & Additional Information.
4. Enter / Select Company, Policy No , Insurance Type , Insured Amount , Last Premium Paid , Last Premium Date, lastPremiumPaidDate Under **General Information.**
5. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address.**



6. Click the **Save** button to save **Insurance Policies**.
7. Click the **Clear** button to remove the entered or selected details.
8. Click the **Close** button to close the popup window.

Editing a Insurance Policies :

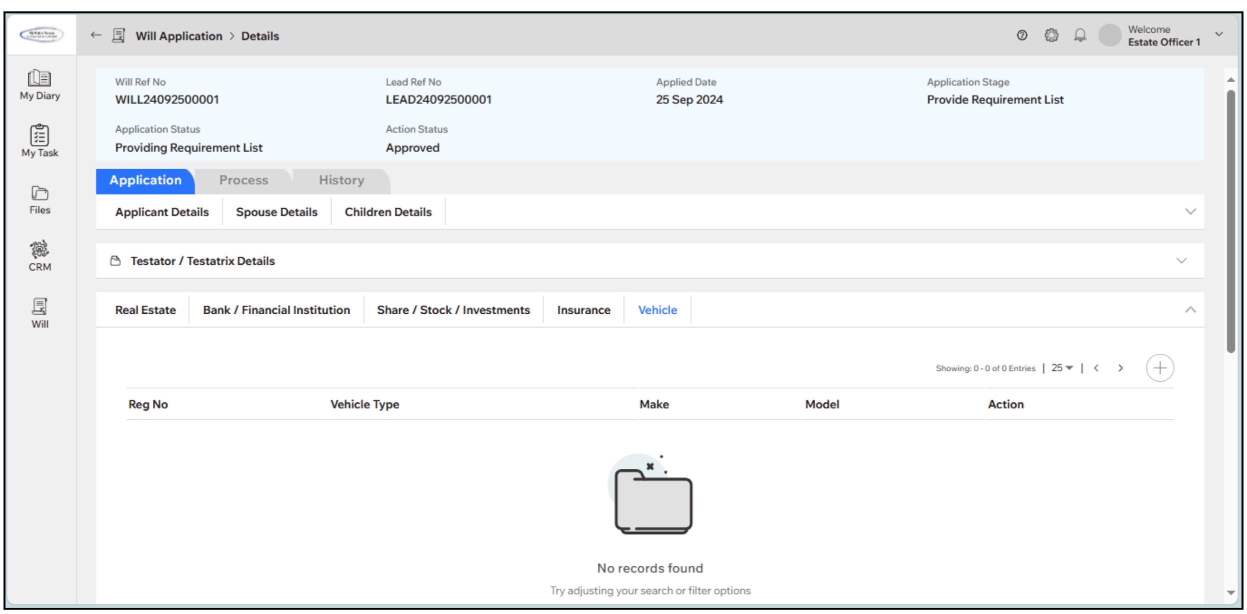
16. Click on the “Open” button and navigate to the “**Edit Insurance Policies”** pop-up screen.
17. Click on the “Edit” button to edit the **Insurance Policies.**
18. Enter / Select Company, Policy No , Insurance Type , Insured Amount , Last Premium Paid , Last Premium Date, lastPremiumPaidDate Under **General Information.**
19. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address.**



20. Click the **Update** button to save the changes.
21. Click the **Refresh** button to refresh all the entered previous values.
22. Click the **Close** button to exit the popup window.

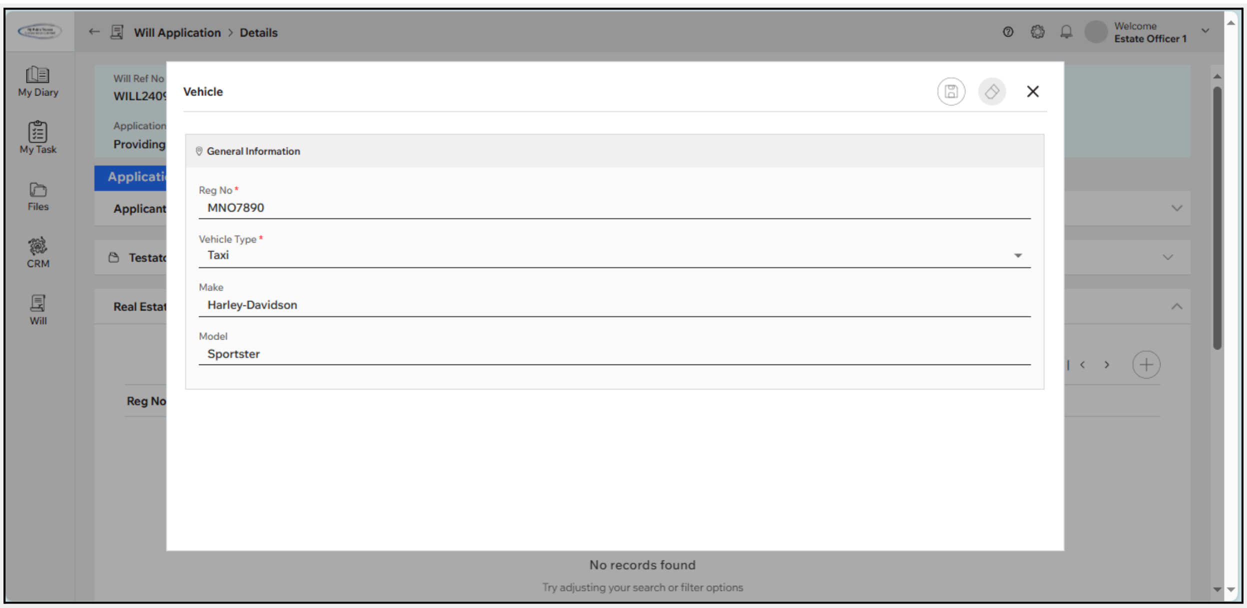
Vehicle Section :

To proceed to the **Vehicle** Tab, select the **Vehicle**.



Adding a Vehicle :

1. Click the **Add** button to enter **Vehicle**.
2. A **Vehicle** popup will appear.
3. This section contains essential information, such as General Information , Address & Additional Information.
4. Enter / Select Reg No , Vehicle Type , Make , Model Under **General Information.**



5. Click the **Save** button to save **Vehicle**.
6. Click the **Clear** button to remove the entered or selected details.
7. Click the **Close** button to close the popup window.

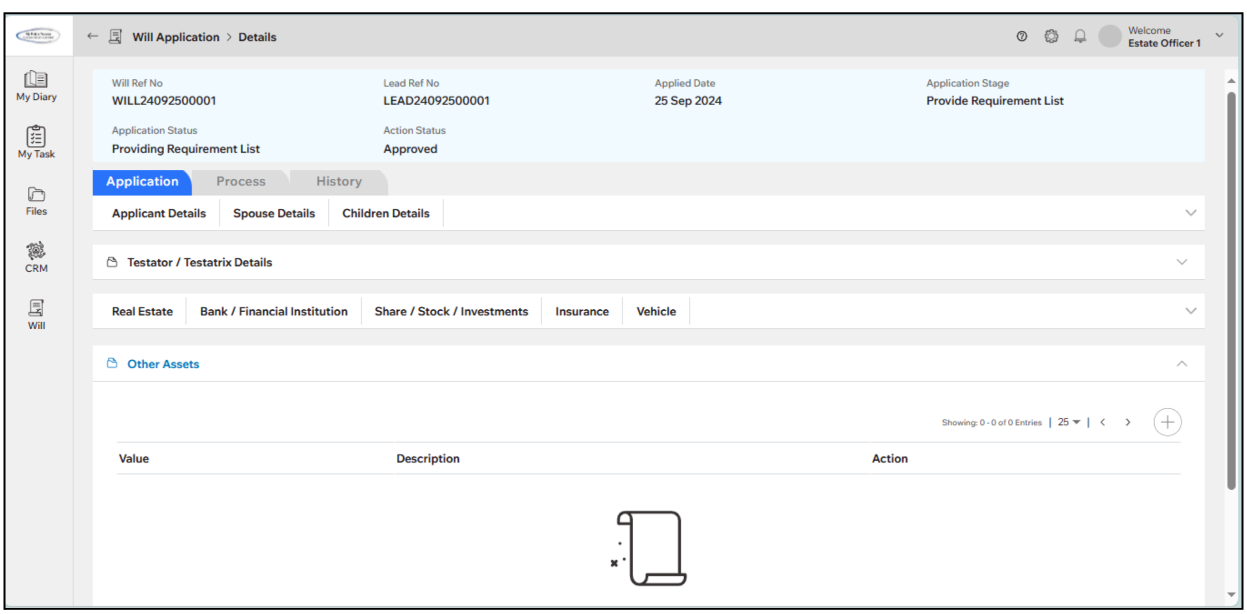
Editing a Vehicle :

8. Click on the “**Open**” button and navigate to the “**Edit Vehicle”** pop-up screen.
9. Click on the “Edit” button to edit the **Vehicle.**
10. Enter / Select Reg No , Vehicle Type , Make , Model Under **General Information.**

11. Click the **Update** button to save the changes.
12. Click the **Refresh** button to refresh all the entered previous values.
13. Click the **Close** button to exit the popup window.

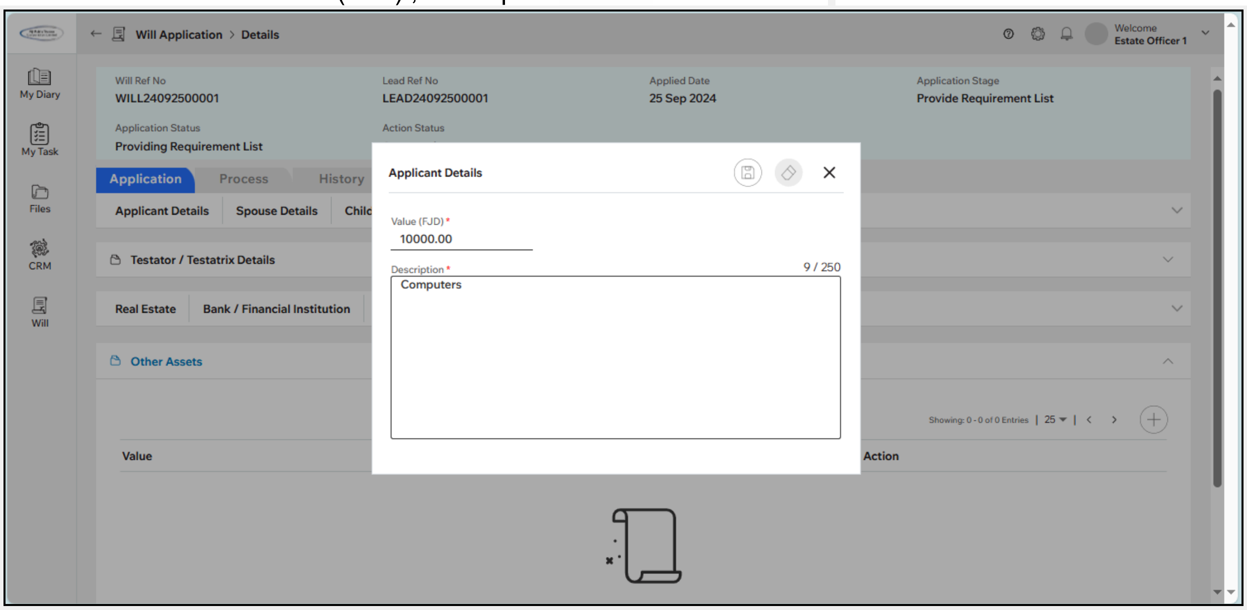
Other Assets Section :

To proceed to the **Vehicle** Tab, select the **Vehicle**.



Adding a Vehicle :

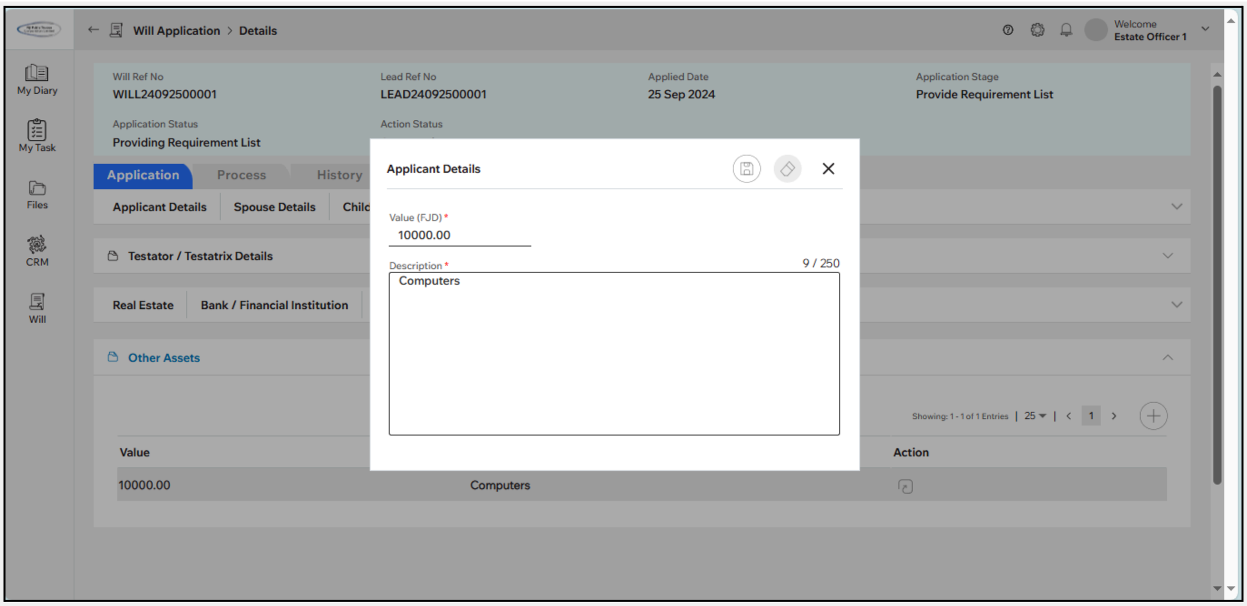
1. Click the **Add** button to enter **Other Assets Details**.
2. A **Other Assets** popup will appear.
3. Enter / Select Value (FJD) , Description Under **Other Assets.**



4. Click the **Save** button to save **Other Assets**.
5. Click the **Clear** button to remove the entered or selected details.
6. Click the **Close** button to close the popup window.

Editing a Vehicle :

7. Click on the "**Open**" button and navigate to the "**Other Assets"** pop-up screen.
8. Enter / Select Value (FJD) , Description Under **Other Assets.**



9. Click the **Update** button to save the changes.
10. Click the **Refresh** button to refresh all the entered previous values.
11. Click the **Close** button to exit the popup window.

Process Tab:

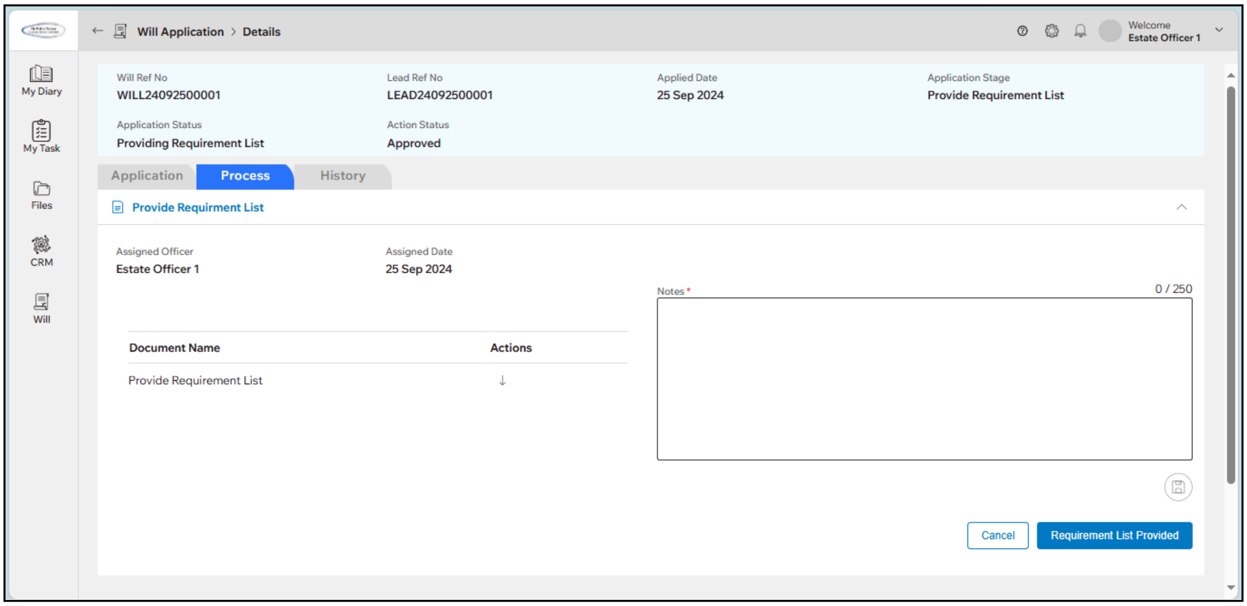
This section contains details such as the process to complete the creation of the application.

Provide Requirement List:

User: Estate Officer

Action Status : Approved

1. The tab shows key information, including the **Assigned Officer**, **Assigned Date**, and the **Turnaround Time (TAT)** for processing.
2. **Requirement List Document** will be displayed and In the **Action** column, the following options will be displayed: **Download**: To download the document.



Adding Notes:

3. Navigate to the **Notes** tab.
4. Enter the relevant information in the **Notes** field.
5. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

6. After uploading all mandatory documents, click on the **Requirement List Provided** button to complete this stage and move to the next step in the process.

Canceling the Stage:

7. If necessary, you can click the **Cancel** button to terminate the current stage.

Collect Initial Document:

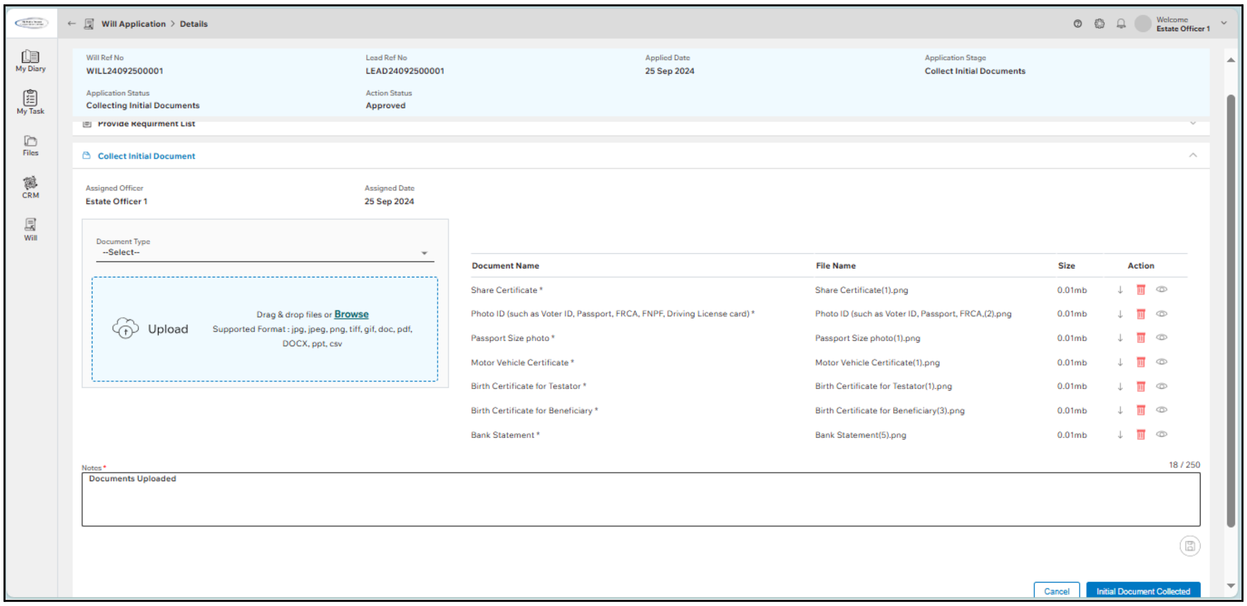
User: Estate Officer

Action Status : Approved

Submit and manage the required documents to complete this step.

1. Click the Detail Tab and display the following fields under **"Assigned Officer"** name and **"Assigned Date" , "Turnaround Time (TAT)"**.
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.
5. Click the "**Delete**" button to delete the selected document.

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



Adding Notes:

10. Navigate to the **Notes** tab.
11. Enter the relevant information in the **Notes** field.
12. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

13. After uploading all mandatory documents, click on the **Initial Document Collected** button to complete this stage and move to the next step in the process.

Canceling the Stage:

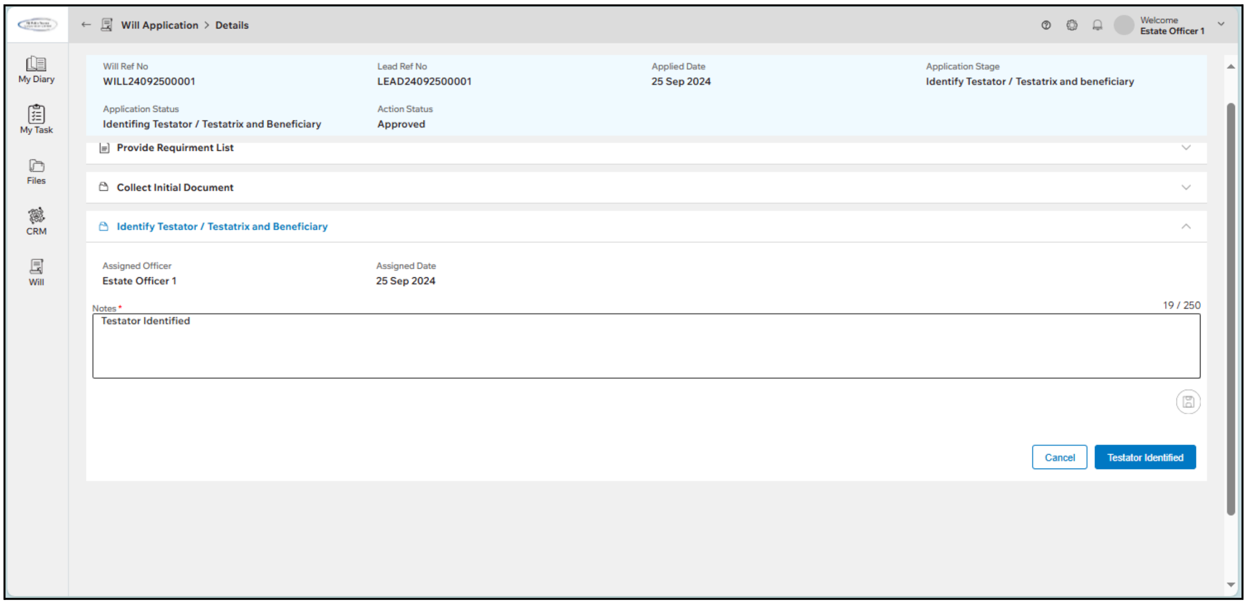
14. If necessary, you can click the **Cancel** button to terminate the current stage.

Identify Testator / Testatrix and beneficiary:

User: Estate Officer

Action Status : Approved

1. Click the Detail Tab and display the following fields under **"Assigned Officer"** name and **"Assigned Date"** , **"Turnaround Time (TAT)"**.



Adding Notes:

2. Navigate to the **Notes** tab.
3. Enter the relevant information in the **Notes** field.
4. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

5. After uploading all mandatory documents, click on the **Testator / Testatrix and Beneficiary Identified** button to complete this stage and move to the next step in the process.

Canceling the Stage:

6. If necessary, you can click the **Cancel** button to terminate the current stage.

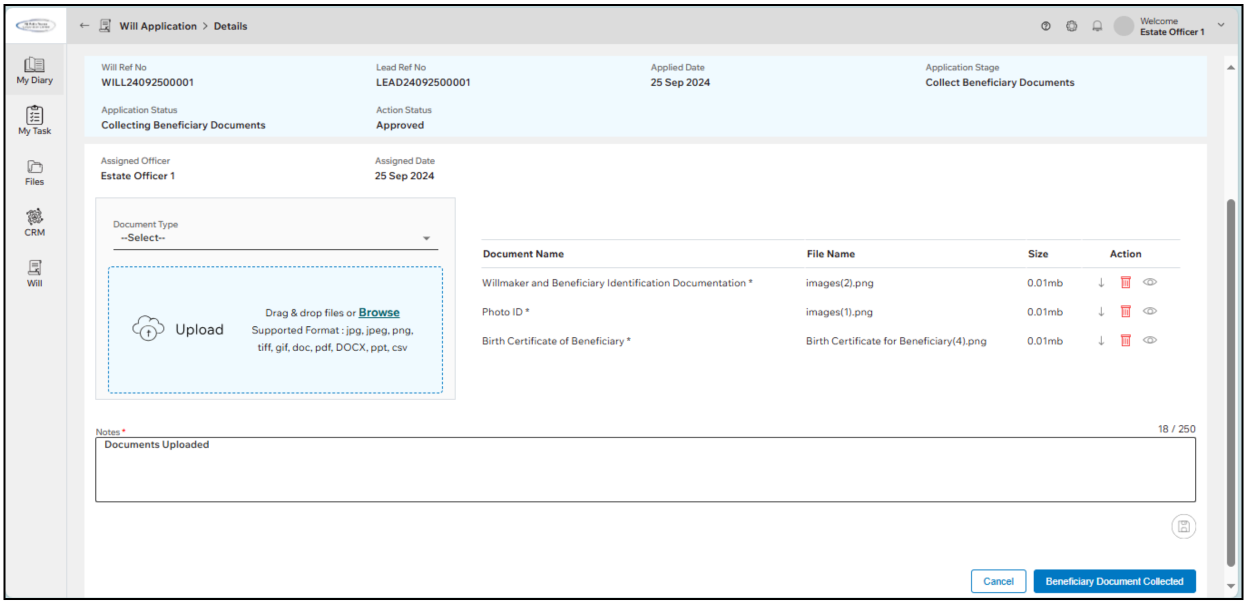
Collect Beneficiary Documents:

User: Estate Officer

Action Status : Approved

1. Click the Detail Tab and display the following fields under **"Assigned Officer"** name and "**Assigned Date" , "Turnaround Time (TAT)"**.
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.
5. Click the "**Delete**" button to delete the selected document.
6. Once Uploaded,the Document will display in a grid with Document Name , File Name , Size , Action.

7. Click the **Download** button symbol under the Action field to download the uploaded document.
8. Click the **Eye** button symbol under the Action field to view the uploaded document.
9. Click the **Delete** button symbol under the Action field to delete the uploaded document.



Adding Notes:

10. Navigate to the **Notes** tab.
11. Enter the relevant information in the **Notes** field.
12. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

13. After uploading all mandatory documents, click on the **Beneficiary Documents Collected** button to complete this stage and move to the next step in the process.

Canceling the Stage:

14. If necessary, you can click the **Cancel** button to terminate the current stage.

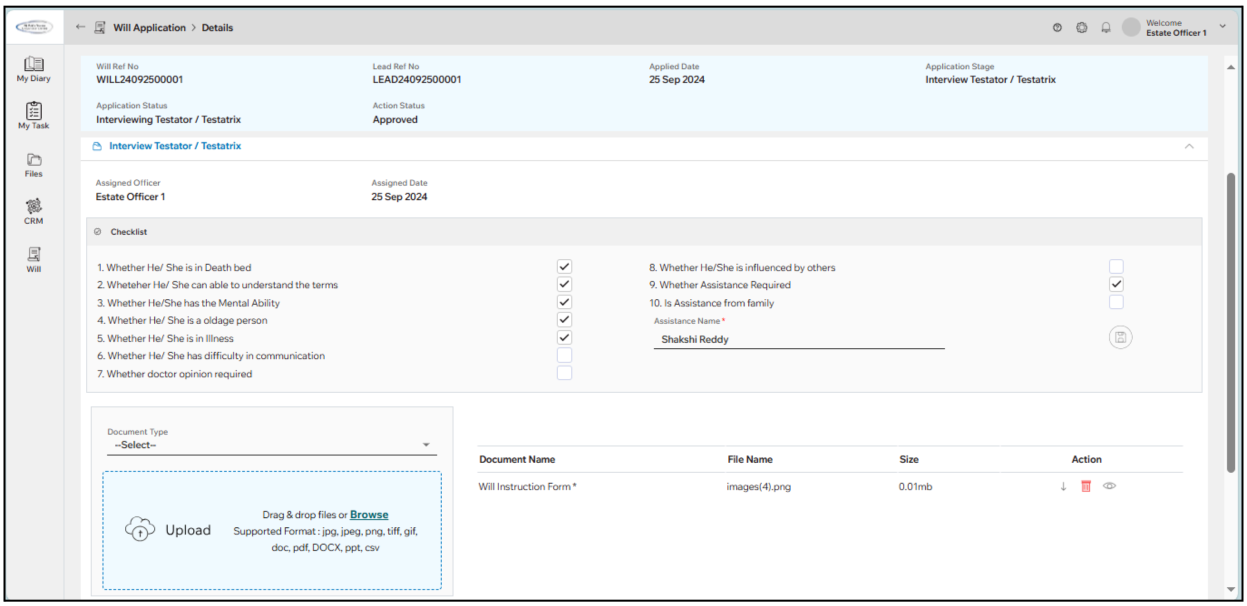
Interview Testator / Testatrix:

User: Estate Officer

Action Status : Approved

1. Click the Interview Testator / Testatrix section and display the following fields under **“Assigned Officer”** name and ”**Assigned Date” , “Turnaround Time (TAT)”**.
2. Select / check the checkbox under Interview Testator / Testatrix.
3. If '**Whether Assistance Required**' is checked, the '**Assistance Name**' needs to be entered.

4. Click the **save** button to save the checked checklist.
5. Click and Select the “**Document Type”** from the Document Type Drop-down List.
6. Click Browse or Drag & drop option to upload the document for selected Document Type.
7. Click the “**Upload**” button near the delete button.
8. Click the “**Delete**” button to delete the selected document.
9. Once Uploaded,the Document will display in a grid with Document Name , File Name , Size , Action.
10. Click the Download button symbol under the Action field to download the uploaded document.
11. Click the Delete button symbol under the Action field to delete the uploaded document.
12. Click the **Eye** button symbol under the Action field to view the uploaded document.



Adding Notes:

15. Navigate to the **Notes** tab.
16. Enter the relevant information in the **Notes** field.
17. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

18. After uploading all mandatory documents, click on the **Interview Completed** button to complete this stage and move to the next step in the process.

Canceling the Stage:

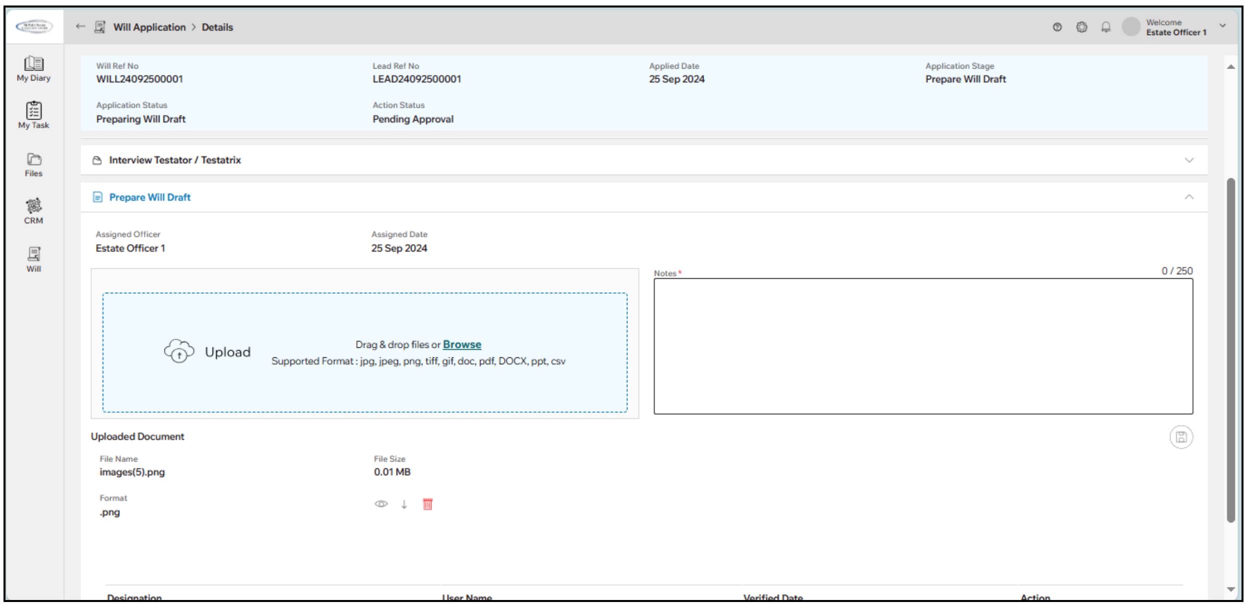
19. If necessary, you can click the **Cancel** button to terminate the current stage.

Prepare Will Draft:

User: Estate Officer

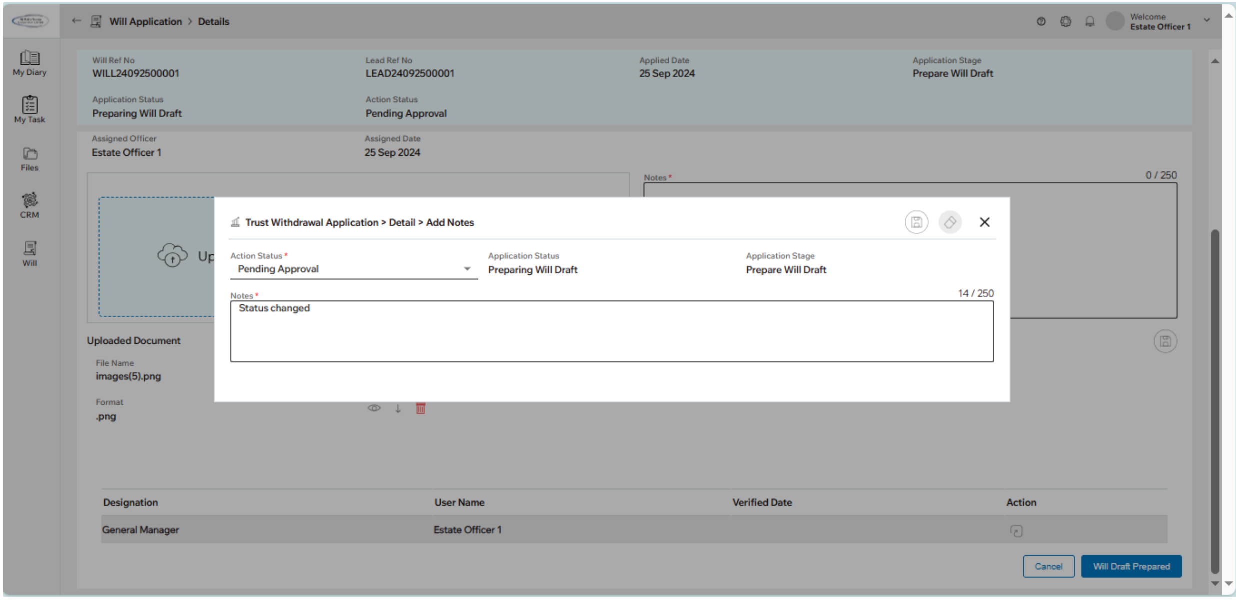
Action Status : Pending Approval

1. Click the Prepare Will Draft section and display the following fields under **“Assigned Officer”** name and ”**Assigned Date” , “Turnaround Time (TAT)”**.
2. Click Browse or Drag & drop option to upload the document for selected Document Type.
3. Click the “**Upload**” button near the delete button.
4. Click the “**Delete**” button to delete the selected document.
5. Once Uploaded,the Document will display in a grid with Document Name , File Name , Size , Action.
6. Click the Download button symbol under the Action field to download the uploaded document.
7. Click the Delete button symbol under the Action field to delete the uploaded document.
8. Click the **Eye** button symbol under the Action field to view the uploaded document.

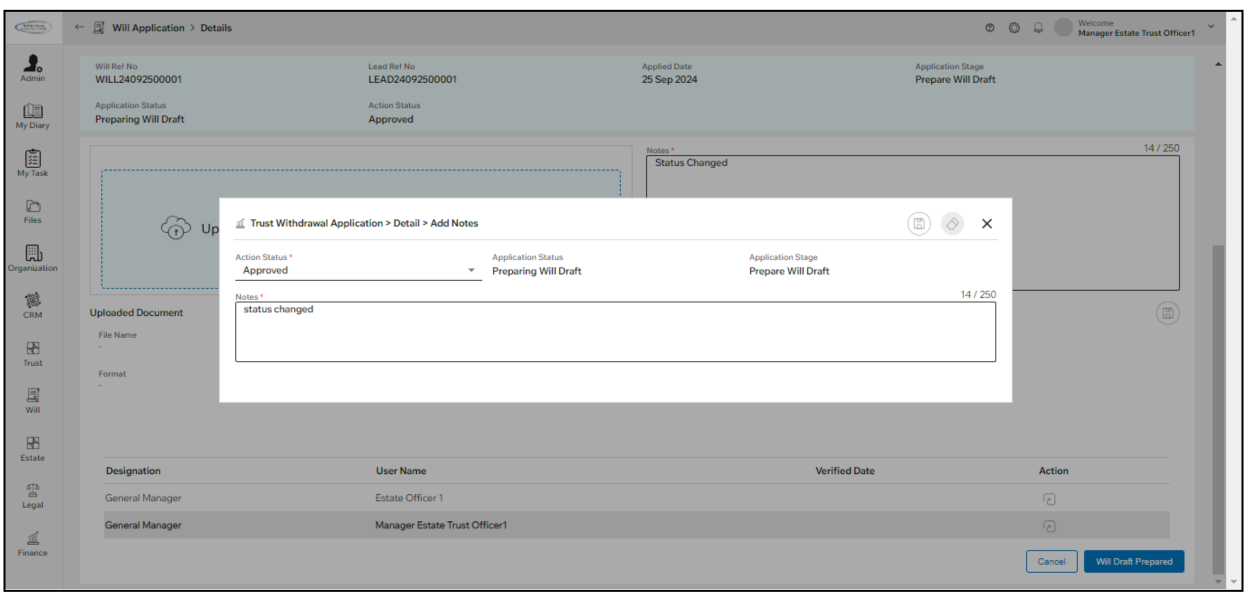


Adding Notes:

9. Navigate to the **Notes** tab.
10. Enter the relevant information in the **Notes** field.
11. Click the **Save** button below the notes field to store the entered notes.
12. Click the **Open** Button in the **Action** column to open the **Trust Withdrawal Application > Detail > Add Notes** popup.
13. In the popup, select the **Action Status** as and enter relevant notes.



14. Click the **Save** button below the notes field to store the entered notes.
15. Click the **Clear** button to remove the entered or selected details.
16. Click the **Close** button to close the popup window.



Status Flow:

User: Estate Officer

➢ Change the status to "**Pending Approval**".

User: Manager

➢ Change the status from **Pending Approval** to **Approved**.

Completing the Stage:

17. After uploading all mandatory documents, click on the **Will Draft Approved** button to complete this stage and move to the next step in the process.

Canceling the Stage:

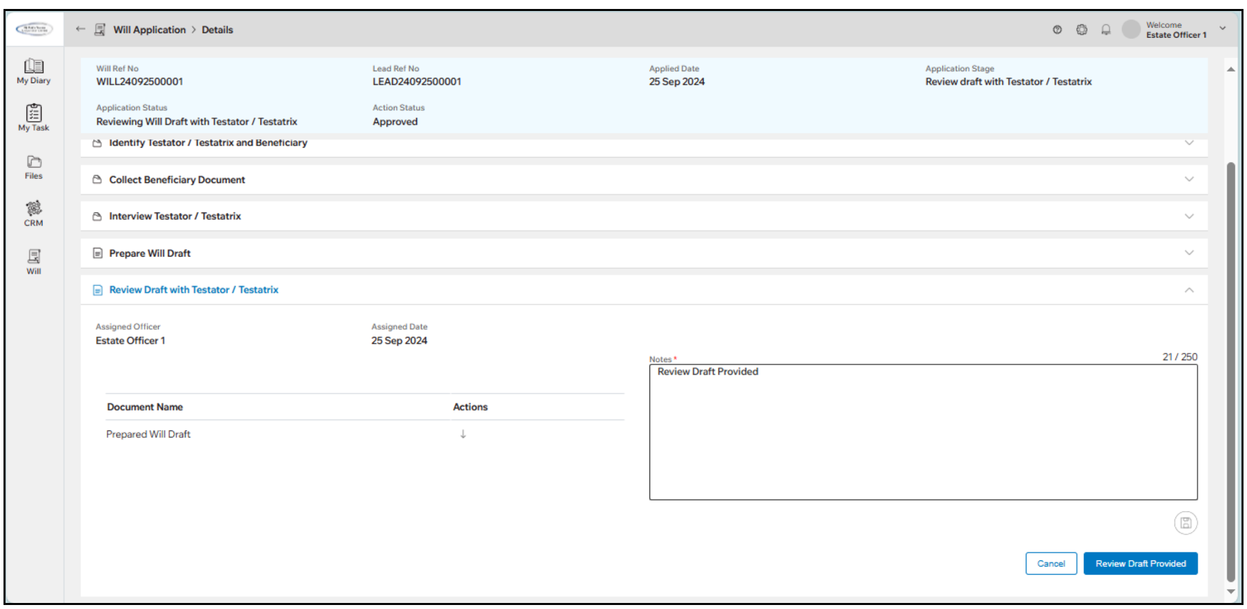
18. If necessary, you can click the **Cancel** button to terminate the current stage.

Review draft with Testator / Testatrix:

User: Estate Officer

Action Status : Approved

1. The tab shows key information, including the **Assigned Officer**, **Assigned Date**, and the **Turnaround Time (TAT)** for processing.
2. Check **Document Name** will be displayed and In the **Action** column, the following options will be displayed: **Download**: To download the document.



Adding Notes:

3. Navigate to the **Notes** tab.
4. Enter the relevant information in the **Notes** field.
5. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

6. After uploading all mandatory documents, click on the **Will Draft reviewed with Testator / Testatrix** button to complete this stage and move to the next step in the process.

Canceling the Stage:

7. If necessary, you can click the **Cancel** button to terminate the current stage.

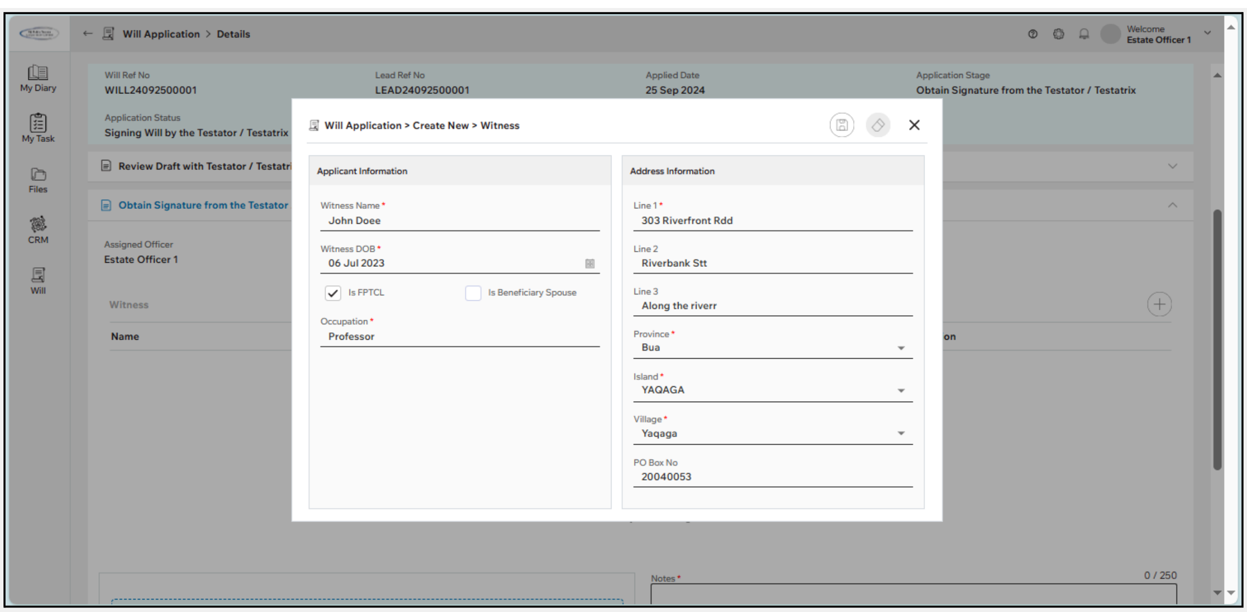
Obtain Signature from the Testator / Testatrix:

User: Estate Officer

Action Status : Approved

Adding a Witness Details:

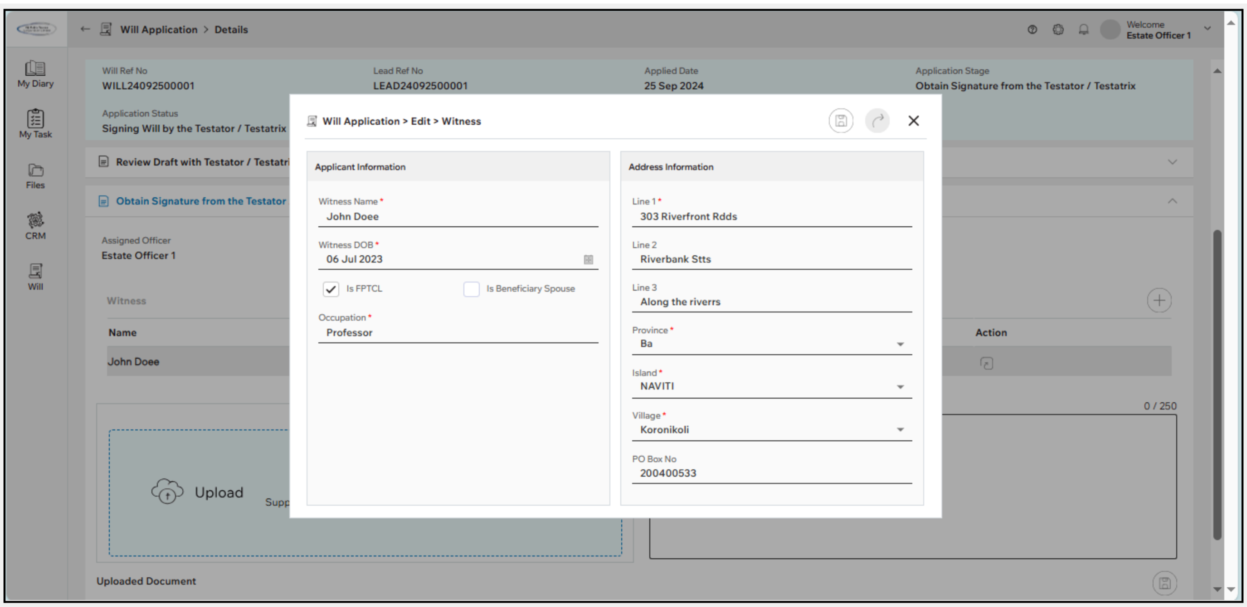
1. Click the **Obtain Signature from the Testator / Testatrix** section and display the following fields under **“Assigned Officer”** name and ”**Assigned Date” , “Turnaround Time (TAT)”**.
2. Click on the **Add** button and **Will Application > Create New > Witness** pop-up will appear.
3. Enter / Select Witness Name , Witness DOB , Occupation , Checkbox for (Is FPTCL , Is Beneficiary Spouse).
4. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address Information.**



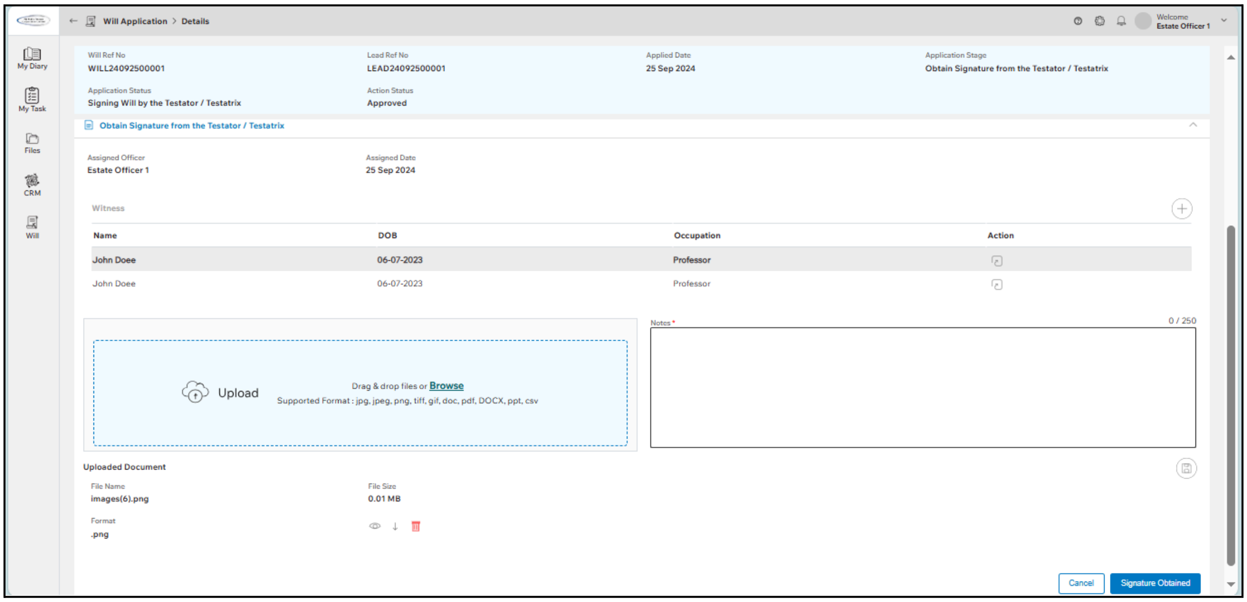
5. Click the **Save** button to save the **Witness details**.
6. Click the **Clear** button to erase the entered or selected details.
7. Click the **Close** button to exit the popup window.

Editing Witness Details:

8. Click on the "**Open**" button and navigate to the "**Will Application > Edit > Witness"** pop-up screen.
9. Click on the "**Edit**" button to edit the **Witness Details**.
10. Enter / Select Witness Name , Witness DOB , Occupation , Checkbox for (Is FPTCL , Is Beneficiary Spouse) under **Witness Information**.
11. Enter / Select Line 1 , Line 2 , Line 3 , Province , Island , Village , PO Box No Under **Address Information.**



12. Click the **Update** button to save the changes.
13. Click the **Refresh** button to refresh all the entered previous values.
14. Click the **Close** button to exit the popup window.
15. Click the Browse or Drag & drop option to upload the document.
16. Click the "**Upload**" button near the delete button.
17. Click the "**Delete**" button to delete the selected document.



18. Once Uploaded,the Document will display in a grid with Document Name , File Name , Size , Action.
19. Click the Download button symbol under the Action field to download the uploaded document.
20. Click the Delete button symbol under the Action field to delete the uploaded document.
21. Click the **Eye** button symbol under the Action field to view the uploaded document.

Adding Notes:

22. Navigate to the **Notes** tab.
23. Enter the relevant information in the **Notes** field.
24. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

25. After uploading all mandatory documents, click on the **Signature Obtained** button to complete this stage and move to the next step in the process.

Canceling the Stage:

26. If necessary, you can click the **Cancel** button to terminate the current stage.

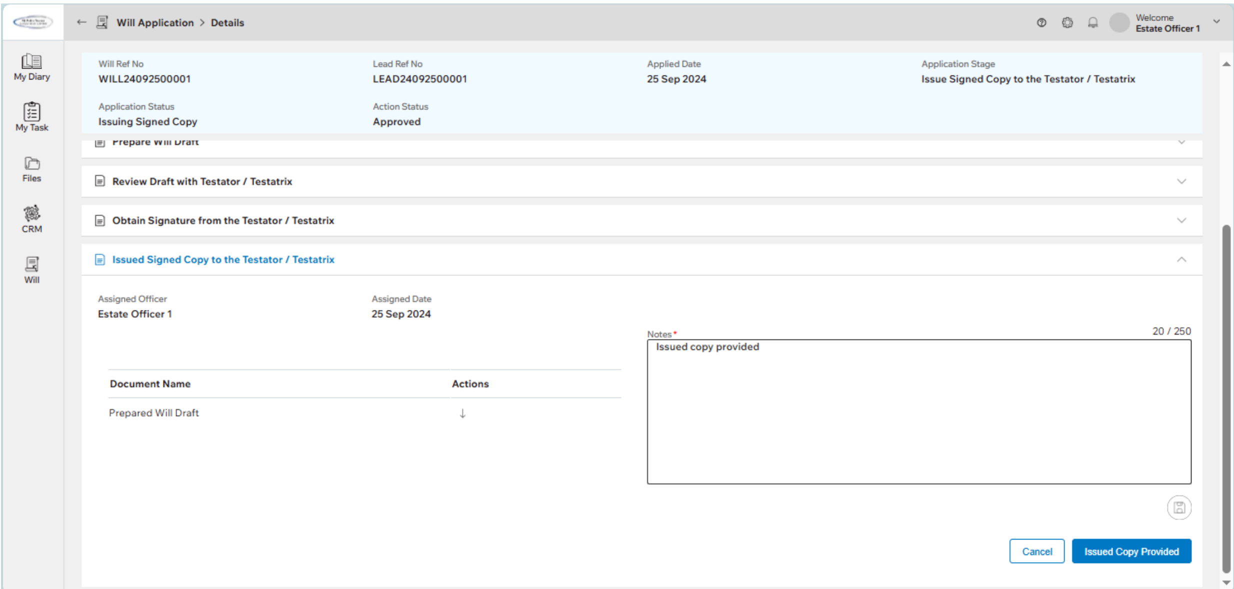
Issue Signed Copy to the Testator / Testatrix:

User: Estate Officer

Action Status : Approved

1. Click the **Issue Signed Copy to the Testator / Testatrix** section and display the following fields under **"Assigned Officer"** name and "**Assigned Date" , "Turnaround Time (TAT)".**

2. Check **Document Name** will be displayed and In the **Action** column, the following options will be displayed: **Download**: To download the document.



Adding Notes:

3. Navigate to the **Notes** tab.
4. Enter the relevant information in the **Notes** field.
5. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

6. After uploading all mandatory documents, click on the **Issued Copy Provided** button to complete this stage and move to the next step in the process.

Canceling the Stage:

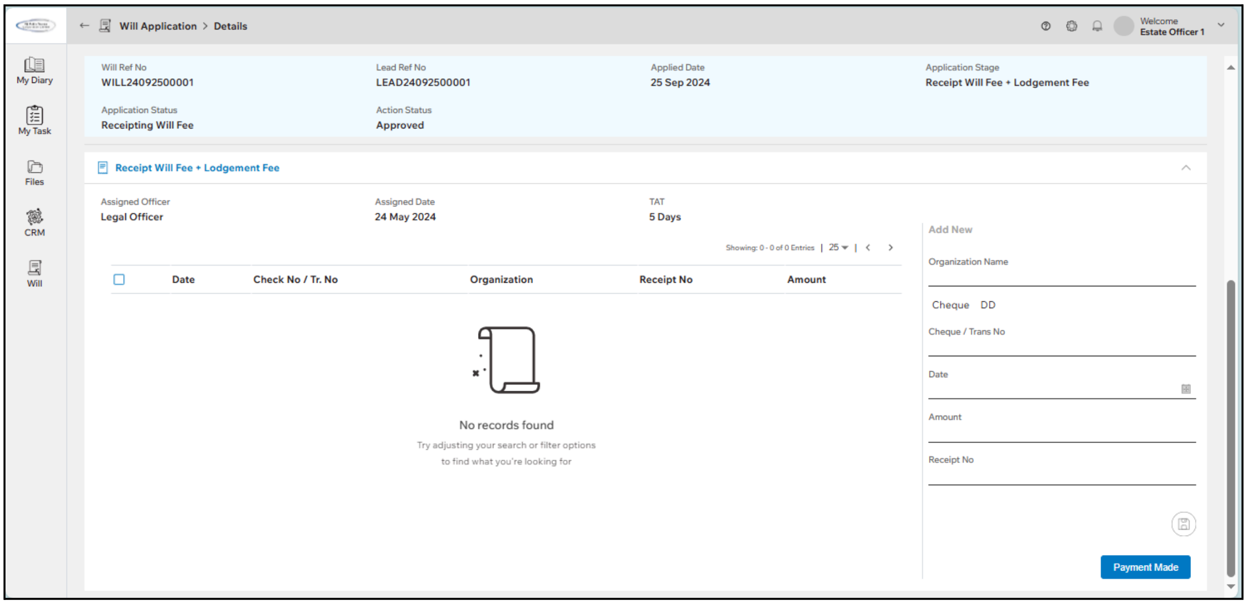
7. If necessary, you can click the **Cancel** button to terminate the current stage.

Receipt Will Fee + Lodgement Fee:

User: Account Officer

Action Status : Approved

1. Click the **Receipt Will Fee + Lodgement Fee** section and display the following fields under **“Assigned Officer”** name and ”**Assigned Date” & “Turnaround Time (TAT)”**. Enter / Select Organization Name , Check , DD , Check / Trans No , Date , Amount , Receipt No.



2. Click on the “**Payment Made**” button to display the entered details.

Completing the Stage:

3. After uploading all mandatory documents, click on the **Payment Made** button to complete this stage and move to the next step in the process.

Canceling the Stage:

4. If necessary, you can click the **Cancel** button to terminate the current stage.

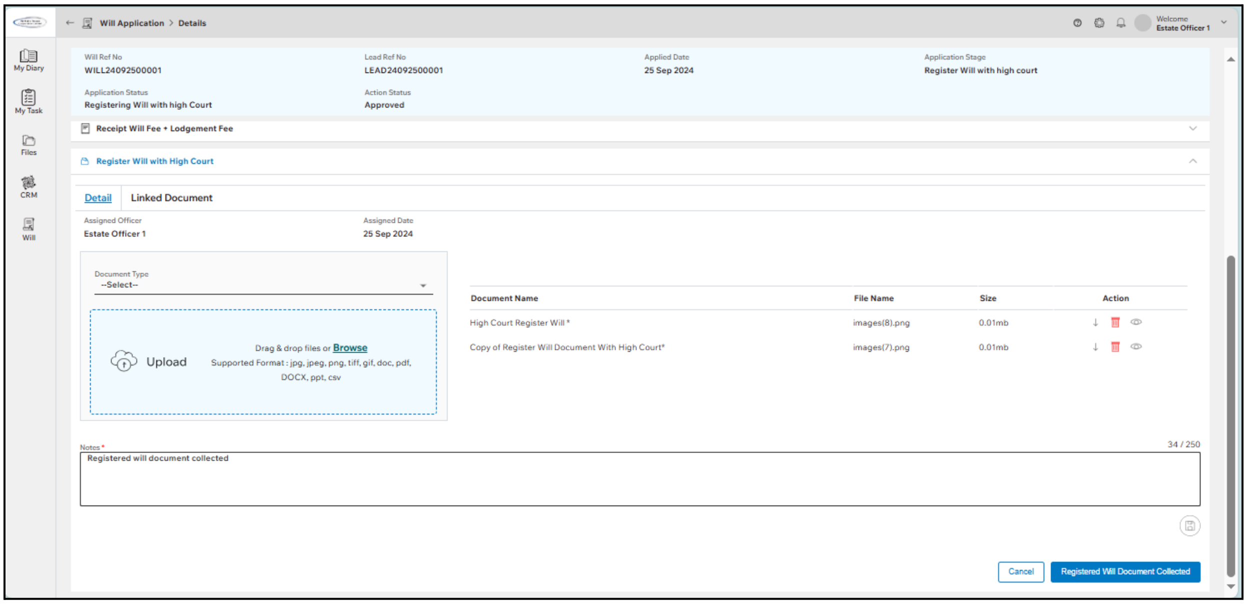
Register Will with high court:

User: Registry Officer

Action Status : Approved

Linked Documents:

1. In this tab, the documents needed from the client are displayed.
2. The Trust Officer can download and view these documents as necessary.



Details:

3. Click the **Register Will with high court** section and display the following fields under **"Assigned Officer"** name and "**Assigned Date" , "Turnaround Time (TAT)"**.
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.
7. Click the "**Delete**" button to delete the selected document.
8. Once Uploaded,the Document will display in a grid with Document Name , File Name , Size , Action.
9. Click the **Download** button symbol under the Action field to download the uploaded document.
10. Click the **Eye** button symbol under the Action field to view the uploaded document.
11. Click the **Delete** button symbol under the Action field to delete the uploaded document.

Adding Notes:

12. Navigate to the **Notes** tab.
13. Enter the relevant information in the **Notes** field.
14. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

15. After uploading all mandatory documents, click on the **Will Registered with high Court** button to complete this stage and move to the next step in the process.

Canceling the Stage:

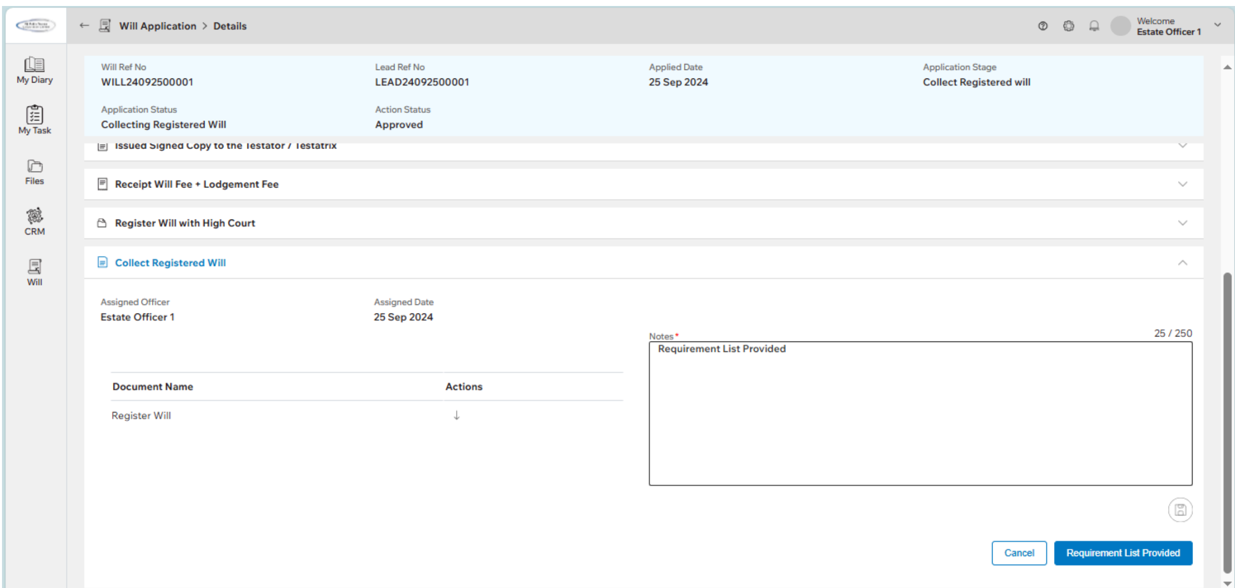
16. If necessary, you can click the **Cancel** button to terminate the current stage.

Collect Registered will:

User: Estate Officer

Action Status : Approved

1. Click the **Collect Registered will** section and display the following fields under **“Assigned Officer”** name and ”**Assigned Date” , “Turnaround Time (TAT)”.**
2. Check **Document Name** will be displayed and In the **Action** column, the following options will be displayed: **Download**: To download the document.



Adding Notes:

3. Navigate to the **Notes** tab.
4. Enter the relevant information in the **Notes** field.
5. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

After uploading all mandatory documents, click on the **Requirement List Provided** button to complete this stage and move to the next step in the process.

Canceling the Stage:

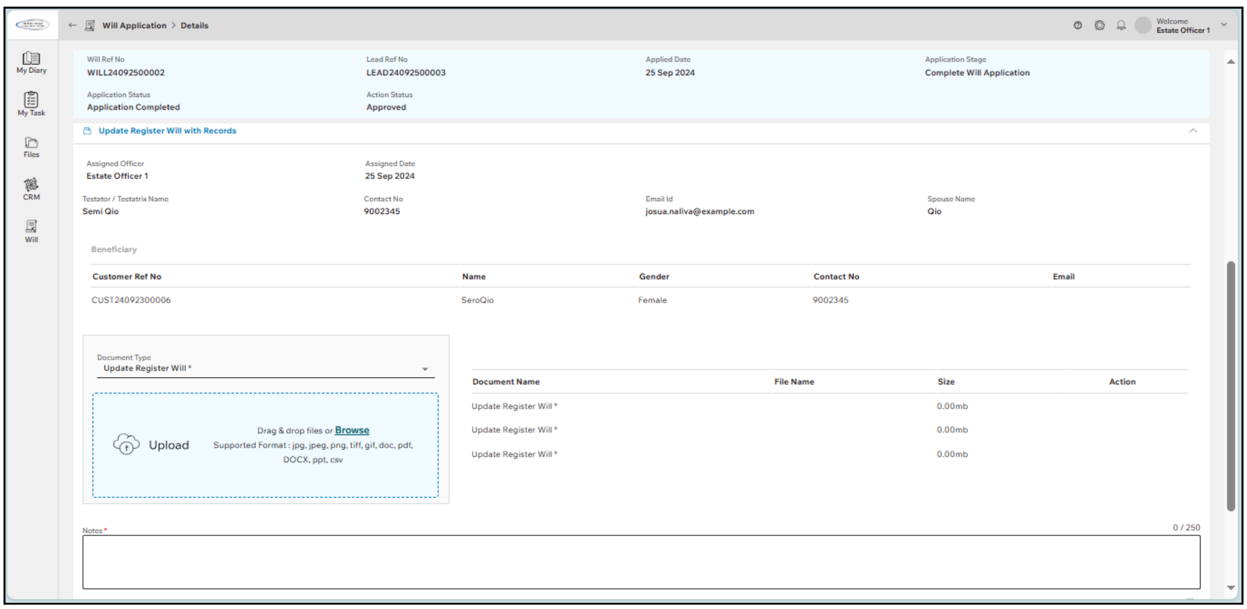
- If necessary, you can click the **Cancel** button to terminate the current stage.

Update Registered Will in the Records:

User: Registry Officer

Action Status : Approved

1. Login with the "**Registry Officer**" to process the "**Update Registered Will in the Records**" step.
2. Click the Detail Tab and display the following fields under **"Assigned Officer"** name and "**Assigned Date"** , **"Turnaround Time (TAT)"**.
3. Display the following fields : Testator / Testatrix Name , Contact No , Email , Spouse Name .
4. Display the following fields of **Beneficiary details**: Customer Ref No , Name , Gender , Contact No , Email.
5. Click Browse or Drag & drop option to upload the document for selected Document Type.



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

Adding Notes:

12. Navigate to the **Notes** tab.
13. Enter the relevant information in the **Notes** field.
14. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

After uploading all mandatory documents, click on the **Updated Register Document Collected** button to complete this stage and move to the next step in the process.

Canceling the Stage:

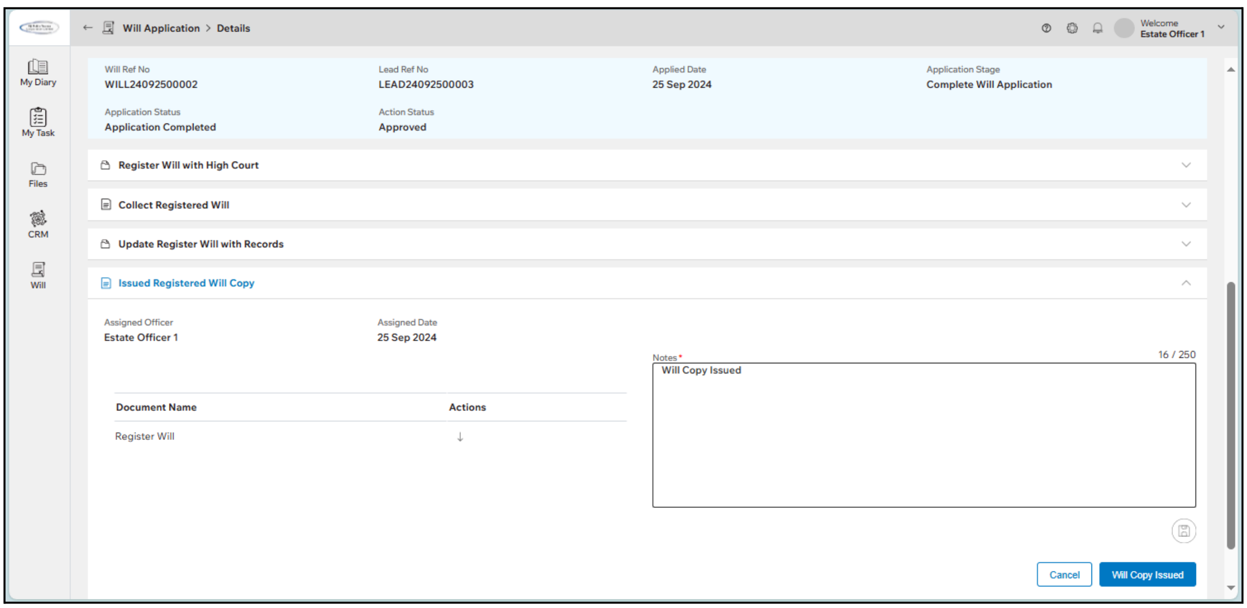
- If necessary, you can click the **Cancel** button to terminate the current stage.

Issue Registered Will Copy:

User: Estate Officer

Action Status : Approved

1. Click the **Issue Registered Will Copy** section and display the following fields under **"Assigned Officer"** name and "**Assigned Date" , "Turnaround Time (TAT)".**
2. Check **Document Name** will be displayed and In the **Action** column, the following options will be displayed: **Download**: To download the document.



Adding Notes:

3. Navigate to the **Notes** tab.
4. Enter the relevant information in the **Notes** field.
5. Click the **Save** button below the notes field to store the entered notes.

Completing the Stage:

6. After uploading all mandatory documents, click on the **Registered Will Copy Issued** button to complete this stage and move to the next step in the process.

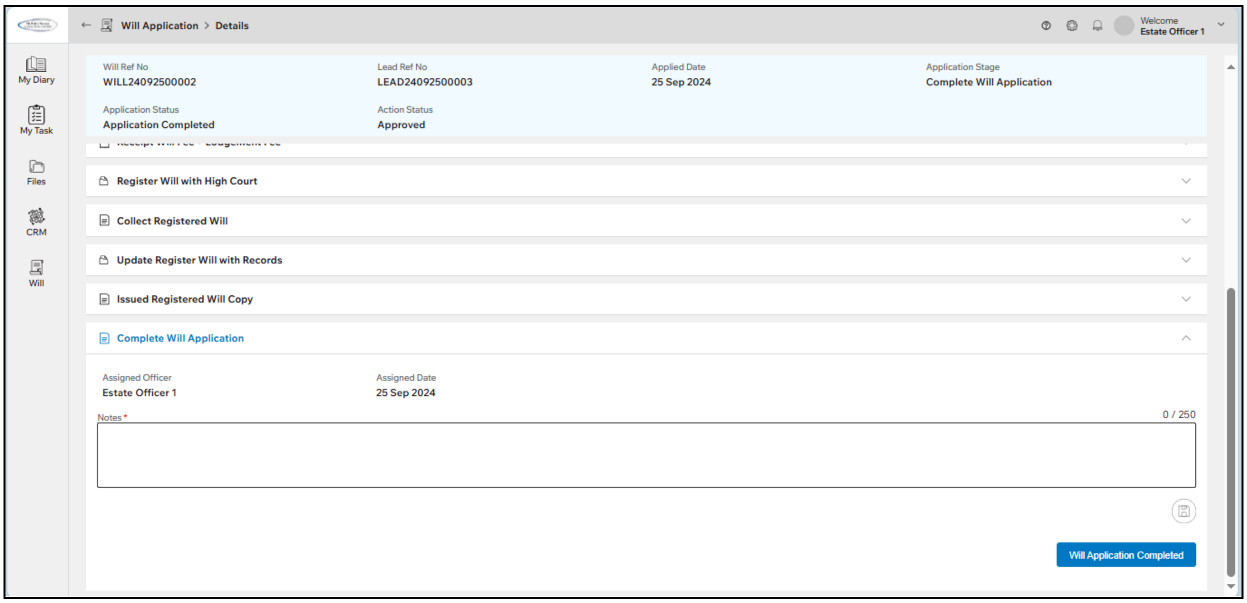
Canceling the Stage:

7. If necessary, you can click the **Cancel** button to terminate the current stage.

Complete Will Application:

User: Estate Officer

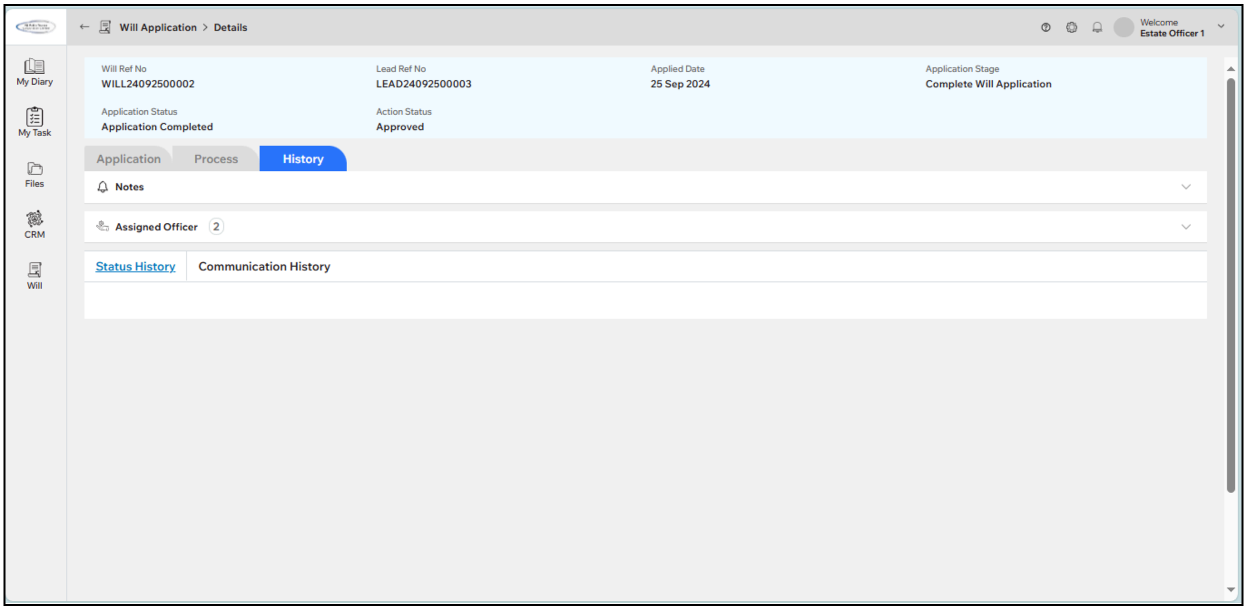
Action Status : Approved



1. Click the **Complete Will Application** section and display the following fields under **“Assigned Officer”** name and ”**Assigned Date”** , **“Turnaround Time (TAT)”.**
2. Enter the relevant notes in the **Notes** field.
3. Click the **Save** button below the notes field to store the entered notes.
4. Complete the stage by clicking on **Will Application Completed.**

History:

The History tab contains the following sub-tabs:



Notes:

- All notes entered at each stage of the process will be listed here.

Assigned Officer:

- Displays the following details: Assigned Officer, Assigned Date, Assigned By, Status values

Status History:

- Shows the status flow and details, including: Officer Name, Date, Time

Communication History:

- Provides details of communication, including: To (recipient), Date | Time, Status, Action.
- Includes all email history related to the respective officers.

END OF DOCUMENT