

Sections

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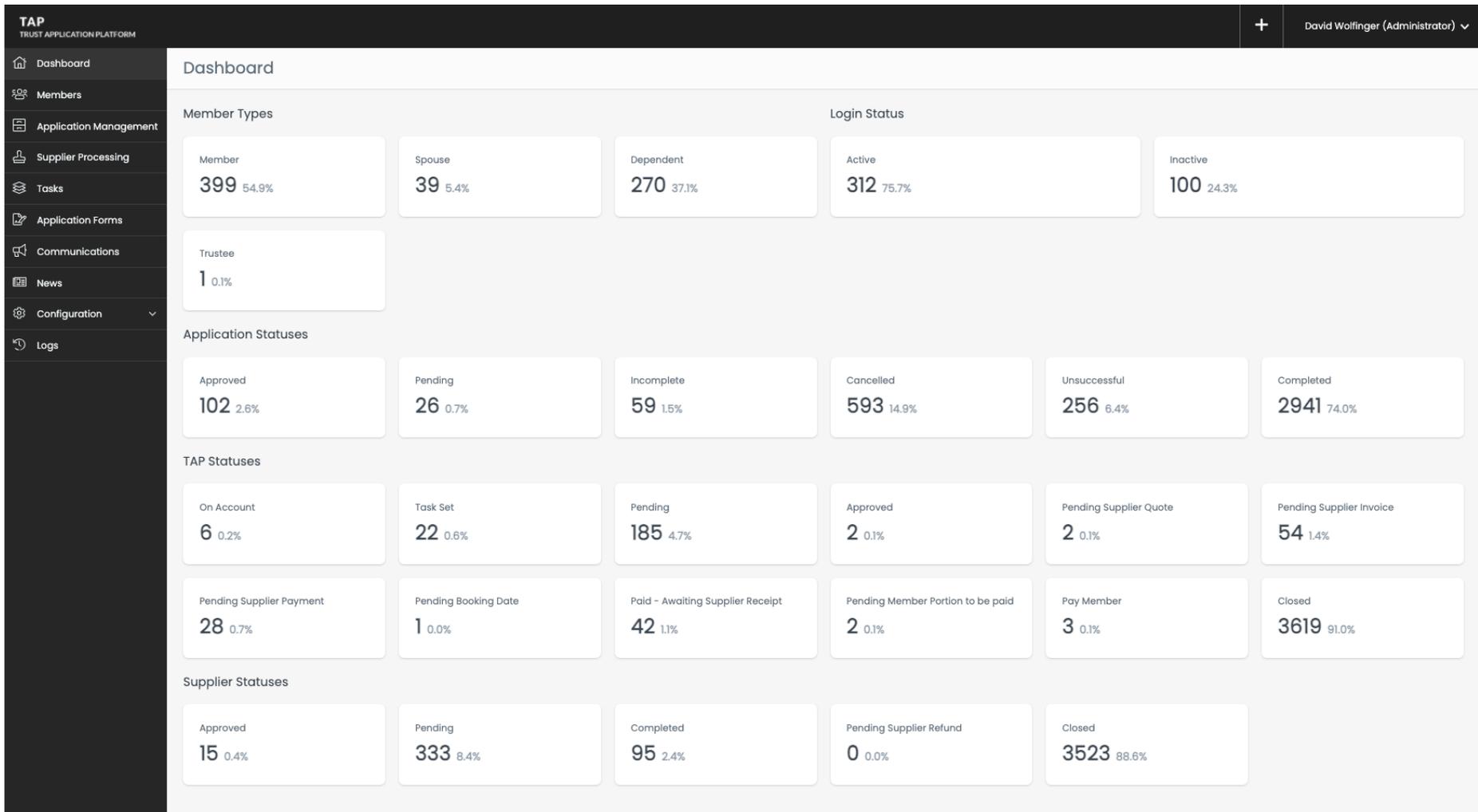
[CONFIGURATION](#)

AUTOMATED & MANUAL NOTIFICATIONS

CCS APP

DASHBOARD

The dashboard is a high level report on all activities within the system. All data is live. All boxes are hyperlinked to the relevant sections with the filter applied



Member Types

- Members - active members within the system

- Spouse - active spouses within the system
- Dependent - active dependents within the system
- Trustee - added member type to record specific information

Login Status

- Active - number of members that have logged into the system
- Inactive - number of members that do not have access or not logged into the system

Application Statuses

- Approved - number of applications that have approved status
- Pending - number of applications that have pending status
- Incomplete - number of applications that have incomplete status*
- Cancelled - number of applications that have cancelled status
- Unsuccessful - number of applications that have unsuccessful status
- Completed - number of applications that have completed status

*Notes on Incomplete Status

A Member can start a new application and choose to FINISH LATER. This essentially changes the status in the admin to be Incomplete. The member has 20 days from the last edited date to complete the Incomplete Application otherwise the status changed to Unsuccessful.

As an example, if the member started the application on the 1st of Jan and then added some more information on the 15th of Jan, then the 20 days would start again from the 15th of Jan as this would be the last edited date. If they did not change anything on the application then on the 21st the application would be automatically changed to Unsuccessful.

If you want to change the status of an Unsuccessful Application to be open again for editing, you need to change the Application status from Unsuccessful to Pending first and then to Incomplete. You cannot change it directly from Unsuccessful to Incomplete.

TAP Statuses

- Pending
- Approved
- On Account
- Task Set
- Pending Supplier Quote
- Pending Supplier Invoice
- Pending Supplier Payment
- Pending Booking Date
- Paid - Awaiting Supplier Receipt
- Pending Member Portion to be Paid
- Pay Member
- Closed

Supplier Statuses

- Approved
- Pending
- Completed
- Pending Supplier Refund
- Closed

MEMBERS

TAP TRUST APPLICATION PLATFORM
+
David Wolfinger (Administrator) ▾

- Dashboard
- Members
- Application Management
- Supplier Processing
- Tasks
- Application Forms
- Communications
- News
- Configuration ▾
- Logs

Members

+ New Member
Export
Import

NAME	DOB	AGE	MEMBER ID	LOCATION	TYPE	ASSOCIATES	APPROVED	PENDING	INCOMPLETE	COMPLETED	LAST LOGGED IN	ACTIONS
Aaron Thorne	02/02/1973	49	M0450	DAYTON	Member	1	0	0	0	0	22/2/2022 6:35pm	🔍👁️📄🗑️
Aiden Newland	28/12/1996	25	M0346	MEEKATHARRA	Member		2	0	0	7	11/1/2022 12:41pm	🔍👁️📄🗑️
Aimee Radcliffe	02/04/1998	23	M0002	WAGGRAKINE	Member		2	0	0	8	22/2/2022 3:05pm	🔍👁️📄🗑️
Aisha Slater	26/08/2000	21	M0490	MAYLANDS	Member		0	0	0	0	N/A	🔍👁️📄🗑️
Akeem Shay	26/02/1999	23	M0003	RANGEWAY	Member		0	0	0	1	10/12/2021 11:39am	🔍👁️📄🗑️
Alana Egerton-Green	28/09/1978	43	M0004	EDGEWATER	Member		0	0	1	4	14/10/2021 10:03am	🔍👁️📄🗑️
Alberta Newland	10/03/1993	29	M0347	MEDINA	Member		0	0	0	6	4/3/2022 8:14am	🔍👁️📄🗑️
Aleasha Kent	15/02/1985	37	M0348	RAVENSWOOD	Member	4	0	0	0	4	9/3/2022 4:09pm	🔍👁️📄🗑️
Aleshiah Christensen	14/04/1995	26	M0005	MARANGAROO	Member	2	0	0	0	4	14/12/2021 1:48pm	🔍👁️📄🗑️
Alex Barnard	01/08/1996	25	M0349	MORLEY	Member		0	0	0	10	1/12/2021 8:42pm	🔍👁️📄🗑️
Alicia King	03/10/1991	30	M0006	SOUTH LAKE	Member	1	0	0	0	3	17/11/2021 12:50pm	🔍👁️📄🗑️
Allison Gentle	09/06/1967	54	M0007	MEEKATHARRA	Member	3	1	0	7	28	23/2/2022 6:16pm	🔍👁️📄🗑️
Alleiah Newland	13/12/2001	20	M0350	KALGOORLIE	Member	3	1	0	2	11	17/2/2022 8:13pm	🔍👁️📄🗑️
Alysea Shay	05/04/1990	31	M0512	WELLINGTON	Member		1	0	3	5	6/2/2022 4:22pm	🔍👁️📄🗑️
Amanda Shar	23/10/1986	35	M0010	MEEKATHARRA	Member	2	2	0	2	12	2/1/2022 12:33pm	🔍👁️📄🗑️
Andrea Wingo	20/09/1984	37	M0012	ROEBOURNE	Member	6	0	0	1	10	22/2/2022 3:05pm	🔍👁️📄🗑️
Andrew Gentle Snr	06/01/1964	58	M0015	MEEKATHARRA	Member	2	1	0	0	15	13/12/2021 7:49pm	🔍👁️📄🗑️
Andrew Gentle Jnr	29/01/1985	37	M0014	MEEKATHARRA	Member	4	2	0	1	12	N/A	🔍👁️📄🗑️
Andrew Dorizzi	04/05/1981	40	M0404	Ellenbrook	Member		0	0	0	1	N/A	🔍👁️📄🗑️
Andrew Abrahamson	16/03/1964	58	M0351	Gosnells	Member		0	0	0	6	2/12/2021 10:16am	🔍👁️📄🗑️
Anna Kelly	30/12/1990	31	M0016	Wilson	Member	1	0	0	0	13	2/2/2022 7:16pm	🔍👁️📄🗑️
Annastasia Shay-Egan	18/09/2001	20	M0017	South Carnarvon	Member		0	0	2	12	7/3/2022 3:23pm	🔍👁️📄🗑️
Annette Invern	16/11/1967	55	M0505	CABLE BEACH	Member		0	0	0	1	20/1/2022 4:58pm	🔍👁️📄🗑️

< 1 2 3 4 >
Showing 1 to 100 of 399 results

The members view has the following characteristics and functionality:

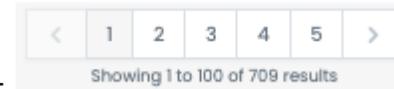
- Default view is all active members, spouses and dependents.
- Search works across - First Name and or Last Name
- Member Type filters by members, spouses, dependents and trustees. You don't need to click enter, once an option is chosen from the drop down it refreshes the list. To reset the list click the X
- To search by DOB, use the Date of Birth Filter at the top. Need to type in the exact format DD/MM/YYYY
- Status is automatically set to Active when you arrive at this page. You can toggle between Active and Inactive. To reset click the X
- Sorting can be done on the following columns by clicking the heading of the column:
 - DOB
 - Member ID
 - Last Logged In
- Action buttons are:
 - Send SMS
 - View Member
 - Edit Member
 - Delete Member

Note if some buttons are missing then you do not have the correct access privileges to see those buttons - contact your administrator

Export will allow you to export all member data. When the export button is clicked the CSV file is created behind the scenes and sent to the email address of the user that requested the export. Takes around 5 minutes to compile and send.

Screen Notes:

- The name is automatically created by first name last name alphabetical order on the first name
- Age is automatically calculated
- Associates indicates how many spouses or dependents a member is associated with. This is managed in the member profile
- Last logged in records the last date/time (WST) the member has logged into the App



- On the footer of the page is the Pagination, there are 100 records per page -

Send SMS Function

When the action icon Send SMS is clicked a pop up appears with the members mobile number automatically populated. This can be edited.

If the Send SMS icon is clicked for a spouse or dependent record, the associated members mobile appears in the To: section as messages cannot be sent to spouses or dependents.

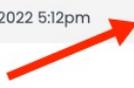
A manual message can be typed in or you can choose from a template (set up under [Configuration/Templates](#)). Once the template has been chosen the text can be edited.

Members

[+ New Member](#) [Export](#) [Import](#)

Search: Date of Birth: Status: Member Type:

NAME	DOB	AGE	MEMBER ID	LOCATION	TYPE	ASSOCIATES	APPROVED	PENDING	INCOMPLETE	COMPLETED	LAST LOGGED IN	ACTIONS
David Wolf	19/01/1968	54		Mosman Park	Member		0	0	1	1	19/7/2022 5:12pm	   



Send SMS ✕

To: David Wolf

Dear David

FAS does not have a birth certificate on record for your children and you have requested assistance to obtain one.

We have created application BCP234238 for you so the Trust can assist you in obtaining the children birth certificates at no cost to you.

Please see the below options on how to obtain birth certificate and advise us which suits your situation.

Option 1: The member to arrange a birth certificate at the Geraldton Court House or online.
Take a photo of the receipt tax invoice/receipt and upload to the application and FAS ATE VNPT

▼

If you choose a template the system will automatically populate the content area with the content that has been set up from the chosen template.

If content codes are used then the system automatically replaces these with the data related to the member.

Clicking send sends the message instantly and is recorded under the notes section of the Member, Spouse or Dependent record.

The screenshot shows a user interface for a member record titled "David Wolf". At the top, there are navigation tabs: "Details", "Applications (0)", "Associates (0)", "Tasks", and "Notes". The "Notes" tab is highlighted with a red box. Below the tabs is a text input field labeled "Enter Note Content". Underneath the input field is a red "Add Note" button. Below the button is a section titled "Notes" which contains a single note. The note is highlighted with a red box and contains the following text: "Manual SMS Sent (0400 444 038): Test Message sent from Member list." Below the note text, it says "David Wolfinger (Administrator) - 17/03/2022 9:07 am".

Sending a message from Application Management:

Application codes based on the [template](#) that has been set up will automatically populate with the data from the application.

Send SMS



To: David Wolf

0400 444 038

Dear David

An update on your application EH23-3810 for \$1,200.00 at {supplier}.

We confirm:

- * You have applied to use the full \$1,200 available at {supplier} .
- * This is the full limit for the Emergency Hardship assistance for the entire financial year (1.7.2022 to 30.6.2023).
- * Once these funds have been used EH22-2793 , FAS ATF YNPT we will be unable to assist with any further Emergency Hardship assistance up to the 30 June 2023.

Regards

Insert Template



Send

Cancel

Once the message is sent, the message content, date and time is recorded in Notes automatically.

David Wolf Application Submission Send to MYOB Send

Details Tasks **Notes** Activity

Enter Note Content

Add Note

Notes

Manual SMS Sent (0400 444 038):
Test Message

David Wolfinger (Administrator) - 29/07/2022 9:19 am

Note: If a template is used that has Content codes and the section you are sending the message from does not have related codes, then the system cannot pre-populate the data. For instance if you were to send a message from the member record and the template had an application ID used, this would not appear when sent and look like the below and this is how the message would be received by the recipient.

Send SMS ×

To: David Wolf

Dear David

Your application {submission-id} for the {amount} for {supplier} has been reviewed.

Dear David

Your application {submission-id} for the {amount} for {supplier} has been reviewed.

[View Member Record](#)

When the action icon View is clicked it brings up the member, spouse or dependent record.

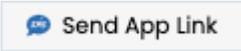
The screenshot displays the TAP Trust Application Platform interface. On the left is a dark sidebar with navigation options: Dashboard, Members, Application Management, Supplier Processing, Tasks, Application Forms, Communications, News, Configuration, and Logs. The main content area is titled "David Wolf" and includes tabs for Details, Applications (0), Associates (0), Tasks, and Notes. The "Details" tab is active, showing contact information and a "Custom Fields" section. The "Meta" section on the right shows the record was last updated on 02/03/2022 at 5:22 pm and created on 02/03/2021 at 7:24 am. Action buttons for "Send App Link", "Send Support Code", "Edit", and "Close" are visible at the top right of the profile view.

Contact Details	
Name	David Wolf
Other Name	David Wolf
Email	ryan+membertest@niftee.com.au
Mobile	0400 444 038
Date of Birth	19/01/1968
Address	7 Martin Court Mosman Park Western Australia 6012
Important Information	Important information here test

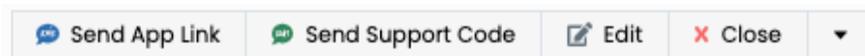
Custom Fields	
Yugunga-Nya Connection - Apical?	
Specify which Dorizzi family member	
If you are not connected to any of the above Apical ancestors, on what basis do you believe that you are connected to the Yugunga-Nya native title claim group:	
Please provide details of your connection to the Apical	
Mother's FULL Name:	
Mother's birth place:	
Mother's Date of Birth: DD/MM/YYYY	
FULL name of Mother's Mother:	
FULL name of Mother's Father:	
Father's FULL Name:	
Father's birth place:	
Father's Date of Birth: DD/MM/YYYY	
FULL name of Father's Mother:	
FULL Name of Father's Father:	
Full name and date of birth of your children	
Are you a native title holder on any native title group?	
Please provide any other information to show your connection to Yugunga-Nya Country	
Please provide any other information to show	

Meta	
Last Updated	02/03/2022 5:22 pm
Created At	02/03/2021 7:24 am

Tabs appear that break down the information into sections:

- Details - overview of the profile information from the record
- Applications - list of all applications associated with the member, spouse or dependent
- Associates - list of all associates of a member which can be either other members, spouses or dependents
- Tasks - tasks that have been created from the tasks module and associated with a member, spouse or dependent
- Notes - the following information is recorded in the notes section: (the system records the user, date and time of record. If it says “System” then its an automated note that has been added
 - Manually entered notes
 - SMS Communication either manually or automated
 - Sending of the link to the App view the button at the top of the screen 
- The Meta information on the right records the Last Updated date/time the member, spouse or dependents record was updated.
- The Created At is the date/time the record was created.

Top Bar Functionality



Send App Link - sends the App link to the members mobile phone number via SMS. The member can click this and it opens the App ready for them to log in. This is the message the member receives:

CC Login <https://ynpt.app>

Use this link to access the Member App. If you are having an issue with access please contact Custodian Community Support on [180 0 001 260](tel:1800001260)

Send Support Code is the 6 digit code that is needed to log into the App. This is sent to the members mobile phone number. The message looks like the below:

Support Code: 381259

The support code is also published in the admin (right hand side) which can be used as verification that the member has the phone where the code was sent.

Support Code: 381259

Meta

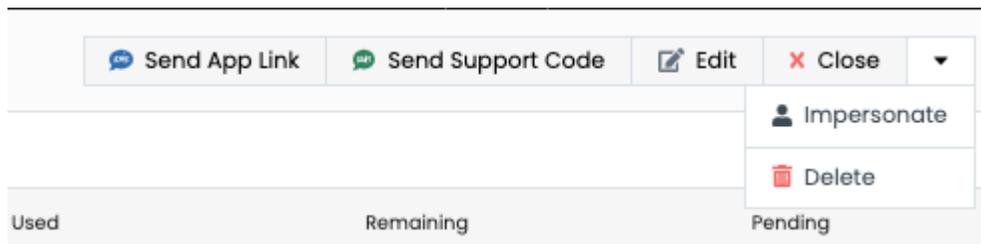
Last Updated	17/03/2022 4:14 pm
--------------	--------------------

Created At	02/03/2021 7:24 am
------------	--------------------

- Edit - Edits the member, spouse or dependent record
- Close - closes the record

The downward arrow provides two extra functions:

- Impersonate - this opens up a TAB with the members view on their App which is how they see the application. You can perform all functions like the member can but this feature has been developed only for support purposes.
- Delete - this deletes the member, spouse or dependent record - be careful. Only a high level administrator has access to this functionality.



Details

- Contact Details - This information is a summary from the full profile. There is further information recorded in the profile that is not seen here.

- Custom Fields - this information comes from the custom data fields that were added from CONFIGURATION/CUSTOM FIELDS. These are extra fields that were created to store more information about members, spouses and dependents. These fields are global for all members, spouses and dependents.
- Cards - This is where images can be uploaded to display on the App for the member to see when they are viewing their own profile.

Applications

TAP TRUST APPLICATION PLATFORM

David Wolfinger (Administrator)

David Wolf

Send App Link Send Support Code Edit Close

Details Applications (1) Associates (0) Tasks Notes

Application Form: Emergency Hardship Application Status: Select Status Limit: \$500.00 Used: \$100.00 Remaining: \$400.00 Pending: \$0.00

ID	FORM	SUPPLIER	AMOUNT	CREATED	STATUS	TAP STATUS	SUPPLIER STATUS	ACTIONS
EH22-2516	Emergency Hardship	Abrolhos Reef Lodge	\$100.00	17/03/2022	Approved	Pending	Pending	  

The application's view is specific to that member, spouse or dependent.

- All applications regardless of status are listed here.

- The limit, Used, Remaining and Pending amounts are only calculated when a specific Application form is chosen from the Application Form drop down.
- Application Status filters by the different statuses of all applications.
- The action buttons link off directly to the form to view or edit. See [Application Management](#)
- You can send SMS messages directly from this section using the Send SMS icon  The message will automatically be stored against the application form.

Financial Information

- Limit is the total amount allocated for the application from [Application Forms](#). This limit is the same for all members, spouses and dependents that have been given access to this application form.
- Used is the amount that has a Status of Approved.
- Remaining is the calculation of Limit minus the Used
- Pending is the total amount that has an Application Status of Pending.
- Calculations are live

Associates

NAME	DOB	MEMBER ID	TYPE	APPROVED	PENDING	INCOMPLETE	COMPLETED	ACTIONS
------	-----	-----------	------	----------	---------	------------	-----------	---------

The associates TAB lists all the associates that are managed by the Member.

- A member can manage other members, spouses and dependents.
- There is no limit to how many associates a member has.
- Associates are added when editing the member record.

When an associate is created, the member now has permission to:

- Edit the profile of the Member, Spouse or Dependent
- Access to view their past applications
- Lodge new applications on their behalf
- When a message is sent to a Spouse or Dependent, the mobile number of the member that is associated with these pops up. This number can be edited before the message is sent.
- The system does not allow messages to be sent directly to either a Spouse or Dependent.
- When an application is created on behalf of a Spouse or Dependent, all notifications go to the Members mobile number.
- All correspondence by the messaging system is recorded against the Spouse or Dependent regardless of the mobile number the message is sent to.

Tasks

Details Applications (1) Associates (0) **Tasks** Notes

Tasks + New Task

SUBJECT	ASSIGNEE	TYPE	PRIORITY	STATUS	DUE DATE	ACTIONS
Test Task	David Wolfinger (Administrator)	Call	Normal	Open	March 20th 2022	  

Tasks that have been created from the tasks module or directly from this TAB appear here.

- New tasks opens the pop up to add a new task.
- When a task is added from the Member Tasks TAB, it also appears in the Global [Tasks](#) section.

New Task ✕

Type ^{*} Priority ^{*} Status ^{*}

Project Due Date ^{*} Assigned To

Subject ^{*}

Description

New Member Record

TAP
TRUST APPLICATION PLATFORM

David Wollinger (Administrator)

New Member

Save Cancel

Details Custom Fields

Member ID Member Type * Associated with Member

First Name * Middle Name Last Name *

Other First Name Other Last Name Email Mobile

Date of Birth Gender *

Important Information

Residential Address

Address Suburb

Postcode State Country

Postal Address (if different to Residential Address)

Address Suburb

Postcode State Country

Bank Account

Account Name BSB Account Number Member Bank Account

Active Yes No

Other Name Preferred No

When adding a new member record, the member ID is automatically greyed out. This number ID is created automatically based on the next numeric number in the sequence when the new record is saved.

The code and sequence is hard coded:

- M is for Member
- S is for Spouse
- D is for Dependent

The format is as follows with 4 digits preceding the prefix code:

- M0001
- S0001
- D0001

All fields that have a **asterix *** are mandatory and the record cannot be saved unless these are filled out.

The right hand side has two main functions:

- Active - this controls if the Member has access to the CCS App system. They can still have an active record with this inactive.
- Other Name Preferred - this function toggles between their First Name, Last Name and Other First Name, Last Name. When this is marked as yes, the CCS App welcomes and addresses the Member using their Other names.

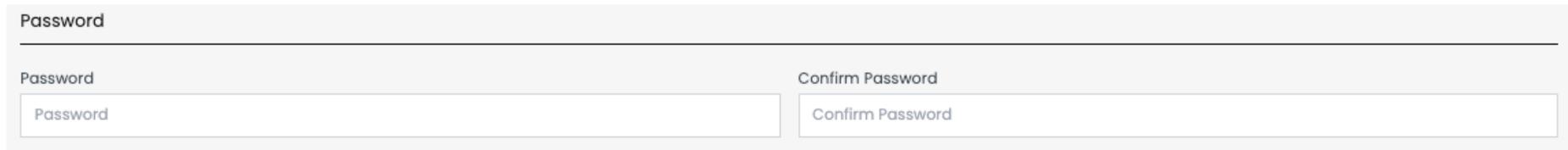
Bank Account

Bank Account			
Account Name	BSB	Account Number	Member Bank Account
<input type="text" value="Account Name"/>	<input type="text" value="BSB"/>	<input type="text" value="Account Number"/>	Yes <input type="checkbox"/>

The members' bank account details are recorded under the member profile.

If this record is edited either by Admin or the member themselves in the CCS App, a notification is sent to info@fasperth.com.au

Password



The screenshot shows a form with a header 'Password' and a horizontal line. Below the line are two input fields. The first field is labeled 'Password' and contains the text 'Password'. The second field is labeled 'Confirm Password' and contains the text 'Confirm Password'.

This functionality is not currently being used in the system. It has been reserved for future ideas and access.

Custom Fields

The custom fields functionality allows extra fields to be added to the Member, Spouse or Dependents records. It is a global function that is for all and cannot be for a specific person.

To access the Custom Fields, edit the member record. The fields are stored under a TAB under the member record.

Notes:

- The custom fields are not visible to the members
- If you add or edit any of the custom fields in the [Configuration](#), these do not affect the historical records against these fields.
- You cannot delete or edit a custom field that has data recorded against it.

- Dashboard
- Members
- Application Management
- Supplier Processing
- Tasks
- Application Forms
- Communications
- News
- Configuration ▾
- Logs

Edit Member – David Wolf

Save View Cancel ▾

Details Custom Fields

Yugunga-Nya Connection - Apical? *

Specify which Dorizzi family member

If you are not connected to any of the above Apical ancestors, on what basis do you believe that you are connected to the Yugunga-Nya native title claim group:

Please provide details of your connection to the Apical

Active
 Yes

Other Name Preferred
 No

APPLICATION MANAGEMENT

TAP
TRUST APPLICATION PLATFORM
+
David Wolfinger (Administrator) ▾

- Dashboard
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Application Management

+ New Application

Search

Member

Application Form

Application Status

TAP Status

Supplier Status

Date of Birth

ID	NAME	FORM	SUPPLIER	AMOUNT	CREATED	CREATED BY	APPLICATION	TAP	SUPPLIER	ACTIONS
EH22-2548	Brolin Quinn Shay	Emergency Hardship		\$500.00	21/03/2022	App	Pending	Pending	Pending	🔍 🗑️ 📄
MCAA22-2547	Mariam Hayes-Gentle	Medical Away From Home Allowance	Member	\$300.00	21/03/2022	Admin - KP	Pending	Pending	Pending	🔍 🗑️ 📄
BDF2546	Leonard 'Jeff' Barnard	Business Development Fund - Application for payments	10minute Oil Change	\$4,354.00	21/03/2022	Admin - ML	Approved	Pending Supplier Invoice	Pending	🔍 🗑️ 📄
HCCK2545	Leeasha Shay	Home COVID Care Kit	FAS ATF YNPT	-	21/03/2022	Admin - KP	Pending	Pending	Pending	🔍 🗑️ 📄
HCCK2544	Shaquell McKenzie	Home COVID Care Kit	FAS ATF YNPT	-	21/03/2022	Admin - KP	Pending	Pending	Pending	🔍 🗑️ 📄
MC22-2543	Timika King	Medical Expenses	Geraldton Midwest Government Dental Clinic	\$262.40	21/03/2022	Admin - WW	Pending	Pending	Pending	🔍 🗑️ 📄
EH22-2541	Shayla Headland	Emergency Hardship	Coles Grocery Only Gift Card - ONLINE	\$500.00	19/03/2022	App	Approved	Pending Supplier Payment	Pending	🔍 🗑️ 📄
MC22-2540	Lillanie Martin	Medical Expenses	Grab Travel	\$700.00	18/03/2022	App	Pending	Pending	Pending	🔍 🗑️ 📄
EH22-2538	Shirley Thorne	Emergency Hardship	Auto Masters - Midland	\$500.00	18/03/2022	App	Incomplete	Pending	Pending	🔍 🗑️ 📄
MCAA22-2537	Sheraleigh Wano	Medical Away From Home Allowance	Broome Dental Clinic	\$30.00	18/03/2022	Admin - WW	Pending	Pending	Pending	🔍 🗑️ 📄
MC22-2536	Sheraleigh Wano	Medical Expenses	Broome Dental Clinic	\$388.00	18/03/2022	Admin - WW	Pending	Pending	Pending	🔍 🗑️ 📄
BDF2533	Alison Gentle	Business Development Fund - Application for payments	To be advised	\$1,986.50	18/03/2022	Admin - WW	Pending	Pending	Pending	🔍 🗑️ 📄
BDF2530	Alison Gentle	Business Development Fund - Application for payments	Bunnings Belmont	\$1,139.99	18/03/2022	Admin - WW	Pending	Pending	Pending	🔍 🗑️ 📄
BDF2526	Leonard 'Jeff' Barnard	Business Development Fund - Application for payments	To be advised	\$300.00	17/03/2022	Admin - WW	Pending	Pending	Pending	🔍 🗑️ 📄
BDF2524	Alison Gentle	Business Development Fund - Application for payments	Department of Transport	\$300.00	17/03/2022	Admin - WW	Approved	Pending Supplier Invoice	Pending	🔍 🗑️ 📄
BDF2523	Alison Gentle	Business Development Fund - Application for payments	To be advised	\$3,848.35	17/03/2022	Admin - WW	Approved	Pending	Pending	🔍 🗑️ 📄
BDF2522	Alison Gentle	Business Development Fund - Application for payments	To be advised	\$540.00	17/03/2022	Admin - WW	Approved	Pending Supplier Payment	Pending	🔍 🗑️ 📄
BDF2521	Alison Gentle	Business Development Fund - Application for payments	To be advised	\$129.60	17/03/2022	Admin - WW	Approved	Pending Supplier Invoice	Pending	🔍 🗑️ 📄
BDF2520	Alison Gentle	Business Development Fund - Application for payments	To be advised	\$600.00	17/03/2022	Admin - WW	Approved	Pending Supplier Quote	Pending	🔍 🗑️ 📄
BDF2519	Alison Gentle	Business Development Fund - Application for payments	To be advised	\$300.00	17/03/2022	Admin - WW	Approved	Pending Supplier Quote	Pending	🔍 🗑️ 📄
BDF2518	Alison Gentle	Business Development Fund - Application for payments	To be advised	\$184.00	17/03/2022	Admin - WW	Approved	Pending Supplier Invoice	Pending	🔍 🗑️ 📄
EH22-2516	David Wolf	Emergency Hardship	Abrohos Reef Lodge	\$100.00	17/03/2022	Admin - DW	Approved	Pending	Pending	🔍 🗑️ 📄
BDF2515	Leonard 'Jeff' Barnard	Business Development Fund - Application for payments	Telstra	\$179.25	17/03/2022	Admin - ML	Approved	Pending Supplier Invoice	Pending	🔍 🗑️ 📄

< 1 2 3 4 5 >

Showing 1 to 25 of 235 results

Application management is the core of the system for all applications that are created either by the Admin or by a Member using TAP.

The filters across the top all work together. You can choose specific filters and then use the x the selection to reset that particular filter.

Application Management + New Application

Search: ID/Supplier... x Member: Name... x Application Form: Form... v Application Status: Approved x v TAP Status: TAP Status... v Supplier Status: Pending x v Date of Birth: DD/MM/YYYY

The columns can be sorted by:

- ID
- Amount
- Created
- Created By

The Created by column records the Admin personal name using their initials to record who created the form. For instance David Wolf would be DW.

Where it indicates App, the Member has created the form using CCS..

The Action buttons are:

- Send SMS
- View Application
- Edit Application
- Delete Application

Send SMS

When the action icon Send SMS is clicked a pop up appears with the members mobile number automatically populated. This can be edited.

If the Send SMS icon is clicked for a spouse or dependent record, the associated members mobile appears in the To: section as messages cannot be sent to spouses or dependents.

A manual message can be typed in or you can choose from a template (set up under [Configuration/Templates](#)). Once the template has been chosen the text can be edited.

Send SMS ✕

To: **Graham Riley**

Message

▼

Clicking SEND sends the message instantly and is recorded under the notes section of the Application.

Details Tasks Notes Activity

Enter Note Content

Add Note

Notes



Manual SMS Sent (0400 444 038):
Test Message
David Wollinger (Administrator) - 21/03/2022 2:34 pm

Status

Application Status	Approved
TAP Status	Pending
Supplier Status	Pending

Dates

Date Lodged	17/03/2022
Date Processed	N/A

Meta

Application Details

David Wolf Application Submission
[Send to MYOB](#) [Send Supplier Email](#) [Edit](#) [Cancel](#)

[Details](#) [Tasks](#) [Notes](#) [Activity](#)

Application Details		Member Details	
ID	EH22-2516	Name	David Wolf
Form	Emergency Hardship	Other Name	David Wolfman
Limit	\$500.00	Email	ryan+membertest@niftee.com.au
Remaining	\$400.00	Mobile	0400 444 038
Supplier	Abrolhos Reef Lodge	Address	
Amount	\$100.00		
Supplier Order Confirmation	/submissions/6c7a647d-6093-4ba2-a0d0-4b2514264cbb		

Form

Information completed by member

Type of assistance required	Bill Payment
Reason for Application	Test David

Supporting Documentation and Requirements

I understand that I am applying for assistance from a Charitable Trust, acknowledge that the application is requested by myself and confirm that I am under genuine financial hardship. ['Agreed']

Administration Information

Application received via	TAP
--------------------------	-----

Multiple Supporting Documents

Supplier Invoice / Receipt

Status

Application Status Approved

TAP Status Pending

Supplier Status Pending

Dates

Date Lodged 17/03/2022

Date Processed N/A

Meta

Sent to MYOB No

Supplier Email Sent Never

Last Updated 17/03/2022 4:14 pm

Created At 17/03/2022 4:13 pm

Created By David Wolfinger (Administrator)

When an application is viewed,  details of the application are shown. All of the application information is shown from the form settings and other related information.

The Application Details are:

- ID - a unique sequential ID starting with the Application code, eg EH22 which represents Emergency Hardship 2022
- Form - Name of the form

- Limit - Application Limit set up in [Application Forms](#)
- Remaining - the amount of funds remaining based on current and historical successful applications
- Supplier - the supplier chosen when the form was filled out either by Admin or the Member via the TAP App
- Amount - the amount being claimed
- Supplier Order Confirmation Link - this is the link that the Supplier receives to upload their invoice/receipt or any other related information. This also confirms that the Member has been supplied the requested goods/services/ [See Supplier Confirmation](#)

Member Details

Key information is shown for the member:

- Name
- Other Name
- Email
- Mobile
- Address

Note that the Name and Other Name is hyperlinked directly to the full Member, Spouse or Dependents profile.

Meta Information

The meta information shows an overview of all the information related to the Application.

Status

Application Status	Approved
TAP Status	Pending
Supplier Status	Pending

Dates

Date Lodged	17/03/2022
Date Processed	N/A

Meta

Sent to MYOB	No
Supplier Email Sent	Never
Last Updated	17/03/2022 4:14 pm
Created At	17/03/2022 4:13 pm
Created By	David Wolfinger (Administrator)

Form

When the application form has been completed, all form field headings are on the left and the data entered is on the right hand side.

Supporting documents are clickable to download the files associated with the application.

Once the supplier has uploaded their invoice or receipt it is automatically associated with the application and can be downloaded from this section. See [Supplier Confirmation](#)

Form

Information completed by member

Type of assistance required Bill Payment

Reason for Application Test David

Supporting Documentation and Requirements

I understand that I am applying for assistance from a Charitable Trust, acknowledge that the application is requested by myself and confirm that I am under genuine financial hardship. ["Agreed"]

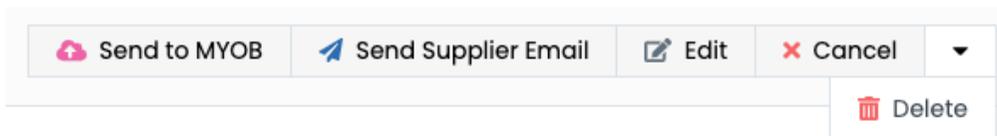
Administration Information

Application received via TAP

Multiple Supporting Documents [screenshot-at-feb-20-08-09-24-zelCa.png](#)

Supplier Invoice / Receipt

Header Functionality



The header functionality is as follows:

Send to MYOB - this sends the information about the application to MYOB and is a manual process. Once it is sent the date and time is recorded in the meta information.

- Send Supplier Email - this sends an email to the supplier with the order information. [See Template Here](#)
- Edit - allows you to edit the application
- Cancel - returns to the Application Management List
- Delete - deletes the application

Notes:

- MYOB is updated immediately once the button is clicked
- The information is recorded as a purchase order in MYOB
- The information can be sent multiple times yet creates a new purchase order each time
- The Member ID and Supplier information is sent
- If the Supplier does not exist in MYOB a new supplier is created. CCS is the point of truth for all suppliers
- No information comes back from MYOB into TAP apart confirmation the data has been transferred

New Application

New Application Submission Save Cancel

Details

ID	Member * <input type="text" value="Search ..."/>	Application Form * <input type="text" value="Application Form"/>	Application Date * <input type="text" value="21/03/2022"/>	
Supplier Type <input type="text" value="Select Supplier Type"/>	Supplier * <input type="text" value="Select Supplier"/>	Other Supplier <input type="text" value="Type in Other Supplier"/>		
Amount * <input type="text" value="\$ Amount"/>	Limit ⓘ N/A	Remaining ⓘ N/A	Pending ⓘ N/A	
Custom Supplier Message <input style="width: 100%; height: 40px;" type="text" value="Custom Supplier Message"/>				
<input type="text" value="Insert Template"/>				

Application Status * <input type="text" value="Pending"/>	
TAP Status * <input type="text" value="Pending"/>	
Supplier Status * <input type="text" value="Pending"/>	
Urgent <input type="checkbox" value="No"/>	

When adding a new application from the Admin, specific mandatory fields need to be filled in. These are represented by *

- ID - a unique sequential ID starting with the Application code will be created when the record is saved, eg EH22 which represents Emergency Hardship 2022, next sequential code could be EH22-1056
- Member - start typing the letters of the first or surname to filter the drop down list to choose a Member, Spouse or Dependent
- Application Form - The application form drop down option will be populated based on whether the Member, Spouse or Dependent has been assigned to the form in the Application Forms module under the TAB [Members](#). Once this is clicked the fields related to the form appear under the Form heading as per the below:

ID	Member *	Application Form *	Application Date *
	Calvin Ashwin (393) x v	Emergency Hardship x v	22/03/2022 x
Supplier Type	Supplier *	Other Supplier	
Bill Payment x v	To be advised x v	Type In Other Supplier	
Amount *	Limit ?	Remaining ?	Pending ?
\$ 10	\$500.00	\$40.20	N/A
Custom Supplier Message			
Custom Supplier Message			
Insert Template v			

Form

Information completed by member

Type of assistance required *

Please select v

Reason for Application *

Enter information here

Supporting Documentation and Requirements

 Upload

I understand that I am applying for assistance from a Charitable Trust, acknowledge that the application is requested by myself and confirm that I am under genuine financial hardship. *

I agree

- Application Date - The date automatically defaults to the current day.
- Supplier Type - All suppliers are categorised into groups. Selecting type filters the next option of selecting a Supplier into a shorter list. It is not mandatory to choose a Supplier Type, just easier if there are large lists of suppliers.
- Supplier - this is the list of suppliers in the database. It is mandatory to select a supplier.
- Other Supplier - this is used if you cannot find the supplier in the list and is a free text field. Note that a Member can also fill out Other Supplier when submitting an application via the CCS App. If they choose Other Supplier a new free text field appears where they can manually enter the name of a supplier. The process in admin is to then Add this new supplier to the Supplier List in [CONFIGURATION/SUPPLIERS](#) and then go back to the application and select this supplier from the list which will remove the record under Other Supplier. It is a field only used if a supplier is not in the master list so that the application can still be completed as Supplier is a mandatory field.
- Amount - this is a mandatory field yet you can enter 0 if there is no \$ value associated with the type of application.
- Limit, Remaining and Pending is updated live based on the Member, Spouse or Dependent chosen and the Application Form. The system allows you to override the Limit and still add an application if there is no remaining budget.
- Custom Supplier Message - this is the message that gets sent as part of the Supplier Notification. You can either type this information in manually or choose from a template.
- The default statuses on the right hand side is Pending. You can edit these according to the status of the application.
- Once the application is saved the extra TABS and Actions at the top appear to manage the application and other information.

David Wolf Application Submission

Send to MYOB Send Supplier Email Edit Cancel

Details Tasks Notes Activity

SUPPLIER PROCESSING

TAP TRUST APPLICATION PLATFORM + David Wolfinger (Administrator) v

Supplier Processing

Supplier Search: Search Suppliers... x Member Search: Search Members... x Application Form: Select Application Status... v Supplier Status: Select Supplier Status... v

SUPPLIER	ACCOUNT TYPE	FORM	NAME	AMOUNT	STATUS	ACTIONS
Coles Grocery Only Gift Card - ONLINE		Emergency Hardship	Shayla Headland	\$500.00	Pending	
Grab Travel		Medical Expenses	Lillanie Martin	\$700.00	Pending	
		Emergency Hardship	Shirley Thorne	\$500.00	Pending	
		Emergency Hardship	Shirley Thorne	\$500.00	Pending	
Broome Dental Clinic		Medical Away From Home Allowance	Sheraleigh Wano	\$30.00	Pending	
Broome Dental Clinic		Medical Expenses	Sheraleigh Wano	\$388.00	Pending	
To be advised		Business Development Fund - Application for payments	Alison Gentle	\$1,198.50	Pending	
Bunnings Belmont		Business Development Fund - Application for payments	Alison Gentle	\$1,139.99	Pending	
To be advised		Business Development Fund - Application for payments	Leonard 'Jeff' Barnard	\$300.00	Pending	
Department of Transport		Business Development Fund - Application for payments	Alison Gentle	\$300.00	Pending	
To be advised		Business Development Fund - Application for payments	Alison Gentle	\$3,426.76	Pending	
To be advised		Business Development Fund - Application for payments	Alison Gentle	\$540.00	Pending	
To be advised		Business Development Fund - Application for payments	Alison Gentle	\$129.60	Pending	
To be advised		Business Development Fund - Application for payments	Alison Gentle	\$600.00	Pending	
To be advised		Business Development Fund - Application for payments	Alison Gentle	\$300.00	Pending	
To be advised		Business Development Fund - Application for payments	Alison Gentle	\$184.00	Pending	
Abrolhos Reef Lodge		Emergency Hardship	David Wolf	\$100.00	Pending	
Telstra		Business Development Fund - Application for payments	Leonard 'Jeff' Barnard	\$179.25	Pending	
Department of Transport		Business Development Fund - Application for payments	Leonard 'Jeff' Barnard	\$916.55	Pending	
To be advised		Business Development Fund - Application for payments	Leonard 'Jeff' Barnard	\$184.00	Pending	
To be advised		Business Development Fund - Application for payments	Leonard 'Jeff' Barnard	\$300.00	Pending	
To be advised		Business Development Fund - Application for payments	Leonard 'Jeff' Barnard	\$600.00	Pending	
To be advised		Business Development Fund - Application for payments	Leonard 'Jeff' Barnard	\$64.80	Pending	

< 1 2 3 4 5 >
 Showing 1 to 25 of 271 results

The supplier processing is a running list of associated suppliers with all applications.

All of the action buttons link through to the specific application.

The filters allow the supplier list to be filtered by:

- Supplier
- Member
- Application Form
- Status

TASKS

TAP
TRUST APPLICATION PLATFORM

David Wolfinger (Administrator)

Tasks + New Task

Search: Assignee: Type: Priority: Status: Project:

#	SUBJECT	ASSIGNEE	TYPE	PRIORITY	STATUS	PROJECT	DUE DATE	ACTIONS
0338	Review Email sent from info@fasperth.com.au at 9.15am	Phil Williams	Email	High	Open		November 1st 2021	
0339	Review Email re: Patrick Shay and Plates - copy in description	Phil Williams	Email	Normal	Open		November 1st 2021	
0396	Please review Geoffrey Oliver application	Phil Williams	Follow Up	Normal	Open		November 22nd 2021	
0406	Review Wade Gentle 2nd MCAA application to see if he is eligible for more assistance	Phil Williams	Reminder	High	Open		November 25th 2021	
0407	PW to review Bradley Wingo (Alison's carer) for next appointment for the amount we can assist with	Phil Williams	Reminder	Normal	Open		November 26th 2021	
0414	Denika Oliver's birth certificate	Mili Liliic	Follow Up	Normal	In Progress		December 1st 2021	
0452	Order Bill Narrier Uniforms		Reminder	Normal	Open		December 16th 2021	
0347	Leonie Gentle Snr - Travel \$1,778.55 - Reimbursement/refund + MV - 2016 Toyota Landcruiser Prado Station Sedan -EXM353	Mili Liliic	Follow Up	Normal	In Progress		January 25th 2022	
0537	TAC - Matthew Abrahamson - COVID Vaccination Certificate	Mili Liliic	Follow Up	Normal	In Progress		February 2nd 2022	
0536	TAC - Hardy Derschow - COVID Vaccination Certificate	Mili Liliic	Follow Up	Normal	In Progress		February 2nd 2022	
0535	TAC - Elaine King - COVID Vaccination Certificate	Mili Liliic	Follow Up	Normal	In Progress		February 2nd 2022	
0533	TAC - Michelle Christensen - COVID Vaccination Certificate	Mili Liliic	Follow Up	Normal	In Progress		February 2nd 2022	
0538	TAC - Troy Little - COVID Vaccination Certificate	Mili Liliic	Follow Up	Normal	In Progress		February 2nd 2022	
0571	Hudson Shay - adding partner and child	Mili Liliic	Follow Up	Normal	In Progress		February 9th 2022	
0572	Hudson Shay - adding partner and child	Mili Liliic	Follow Up	Normal	Open		February 11th 2022	
0440	Yullela - Evelyn's shed	Mili Liliic	Follow Up	Normal	In Progress		February 16th 2022	
0608	Follow-up with Benadeek's support document to add as spouse for Edwin	Karlina Piggford	Follow Up	Normal	Open		February 28th 2022	
0393	F/up with DCP if not heard - Dependant - Stella Shay - Age: 14??	Warina Wesley	Follow Up	Normal	In Progress		March 3rd 2022	
0390	Dependant - Lasami Crowe (Lashani) - Age: 14??	Warina Wesley	Follow Up	Normal	In Progress		March 8th 2022	
0586	Kadence - Shane Rileys Son Phone Number 0499 930 547	Warina Wesley	Call	Normal	In Progress		March 15th 2022	
0649	If no response for Tijana Rickaby then follow up with Lizzy	Warina Wesley	Follow Up	Normal	Open		March 17th 2022	
0289	Andrew Gentle - Turning 18 on 14.01.2022	Claire MASIELLO	Follow Up	Normal	In Progress	Membership - Dependents turning 18	March 21st 2022	
0539	Robert Shay turns 18 on 29.3.2022 - contacted Cheryl Shay to complete PBC membership form	Claire MASIELLO	Follow Up	Normal	Open	Membership - Dependents turning 18	March 21st 2022	

Showing 1 to 25 of 85 results

The tasks module is a high level project management tool that is integrated right across the system with Members, Spouses, Dependents, Applications and Suppliers. It can also be used for independent tasks that are not related to any of the aforementioned.

New Task

When adding a new task from the Tasks module, the following information below is required.

On the right hand side there is the option to link the task to a record. Select the Record type first and then another option will allow you to select the specific record related to the Type.

New Task Save Cancel

Details

Type * Priority * Status * Project

Type Normal Open Project

Due Date * Assigned To *

Due Date Search ...

Subject *

Subject

Description

Description

Linked Record

Linked Record

Submission

Member

Supplier

Linked Record

Submission

Submission *

Search ...

- MCAA22-2483
- MC22-1693
- MCAA22-2474
- BDF2514
- MC22-2465
- EAP22-2250
- EAP22-2429
- EAS22-1980
- BDF2509

If a task is linked to a record then it will automatically appear in the relevant sections.

Member Details

David Wolf

Send App Link Send Support Code Edit Close

Details Applications (1) Associates (0) **Tasks** Notes

Application Submission

David Wolf Application Submission

Send to MYOB Send Supplier Email Edit Cancel

Details **Tasks** Notes Activity

Suppliers

AAMI Suppliers

Edit Close

Details **Tasks** Notes

Projects

Projects are managed from [Configuration/Types](#) - choose the group Projects. You can add and remove projects from here.

Projects will only appear in the Tasks drop down list if they are active.

Types

[+ New Option](#) [+ New Group](#) [↕ Re-Order](#)

Search

Group

GROUP	OPTION	COLOUR	ORDERING	ACTIVE	LOCKED	ACTIONS
Projects	TAC Meeting 14.12.2021 Perth			✗	✗	
Projects	Christmas Office Closure			✓	✗	
Projects	TAC - Reimbursement Review vs ATO Current Allowance Rates			✓	✗	
Projects	Consent Determination Part A - 02.11.2021			✓	✗	
Projects	Community Meeting Friday 17.12.2021 Meekatharra			✗	✗	
Projects	Membership - Dependents turning 18			✓	✗	
Projects	BackFlow Device Testing			✓	✗	
Projects	Community Meeting Wednesday 12.01.2022 Geraldton			✗	✗	
Projects	TAC Meeting 29.03.2022 Cue			✓	✗	
Projects	ATU Maintenance			✓	✗	
Projects	TAC Meeting 20.10.2021 Perth			✗	✗	
Projects	TAC Meeting 25.08.2021 Perth (ex Cue/Mt Magnet)			✗	✗	
Projects	Community Meeting Wednesday 15.12.2021 Perth			✗	✗	

APPLICATION FORMS

TAP
TRUST APPLICATION PLATFORM

David Wolfinger (Administrator)

Applications + New Application ↕ Re-Order

Search: Status:

NAME	ALLOCATION	USED	REMAINING	START	END	APPROVED	PENDING	INCOMPLETE	COMPLETED	STATUS	ACTIONS
Adding your spouse and/or dependent child to TAP	\$0	\$0	\$0	25/01/2022	30/06/2022	0	3	12	8	Active	
Business Development Fund - Application for payments	\$200,000	\$28,800	\$171,200	17/03/2022	30/06/2022	16	3	0	4	Active	
Business Development Fund - Grant Application	\$0	\$0	\$0	17/11/2021	30/06/2022	0	5	21	9	Active	
Education Assistance - Primary	\$150,000	\$56,565	\$93,435	30/06/2021	30/06/2022	3	0	66	358	Active	
Education Assistance - Secondary	\$300,000	\$59,353	\$240,647	30/06/2021	30/06/2022	2	0	18	203	Active	
Emergency Hardship	\$200,000	\$138,896	\$61,104	30/06/2021	30/06/2022	1	1	32	509	Active	
Funeral Assistance	\$50,000	\$5,000	\$45,000	17/11/2021	30/06/2022	0	0	7	2	Active	
Home COVID Care Kit	\$0	\$0	\$0	04/03/2022	30/06/2022	52	10	0	44	Active	
Medical Away From Home Allowance	\$280,000	\$63,587	\$216,413	30/06/2021	30/06/2022	4	2	47	258	Active	
Medical Expenses	\$196,000	\$50,553	\$145,447	30/06/2021	28/07/2022	9	3	28	217	Active	
Membership - Yugunga-Nya Native Title Aboriginal Corporation - Application Form	\$0	\$0	\$0	01/07/2021	30/06/2022	0	2	0	64	Active	
Property Maintenance Request	\$0	\$77,464	\$-77,464	01/07/2021	30/06/2022	24	5	2	86	Active	
Trust Feedback Form	\$0	\$0	\$0	20/12/2021	30/06/2022	5	0	3	2	Active	
Wellbeing Fund	\$100,000	\$6,454	\$93,546	17/11/2021	30/06/2022	1	1	46	35	Active	

Showing 1 to 14 of 14 results

The landing page provides an overview of every active application. All information here is live.

New Application Form

New Application Form

Save Cancel

Details SMS Form Suppliers Members FAQ's Completion Screen

Application Name * **Prefix ***

Limit (Per Member) **Allocated Budget *** **Open Date *** **Close Date ***

Account Code

Active

Instant Approval

Suppliers Visible

Amount Visible

Single Application

Background Colour

Birth Year From **Birth Year To**

Icon

Details

- Application Name - mandatory field. This is what the members will see when they see the application on their TAP App
- Prefix - this is the information that goes before the automated numerical sequence. For instance you may put a prefix of AB. The system would then create the first number of EB-0001. All numerical sequences start from 0001

- Limit - this is the maximum value that can be used against this application
- Allocated Budget - this is the global limit for this application based on all Members that have access. This does not have any functionality behind it, more so just a number that can be seen on the Application Form landing page to show the Allocated Budget, Total Used and Remaining
- Open Date - this is when the application starts from and is visible in CCS App
- Close Date - this is the end date of the application and removes the application visibility from CCS App
- Account Code - This is the code that is attached to the export to MYOB so that the applications that are sent to MYOB are associated with a particular category in MYOB

Meta

- Active - This determines if the application is active and visible in the Admin panel under Application Management
- Instant Approval - this triggers the automated SMS message and also the status is automatically set to Approved
- Suppliers Visible - this controls whether the supplier option is visible for Members. Some forms do not require the member to choose a supplier so we hide this
- Amount Visible - this controls whether the member needs to enter a value into the form. This is a hard coded field that we use for other functionality like remaining amounts, reporting etc. If this is not clicked then the value is not required
- Single Application - this allows the member to only apply once for the a particular application
- Background Colour - this determines the colour of the background tile colour of the Application on the member CCS App - [see here](#)
- Birth Year From/To - this controls at a global member status who can see the application form in the CCS App
- Icon - this is the icon that appears with the application on CCS App - [see here](#)

SMS

Edit Application Form

Details

SMS

Form

Suppliers

Members

FAQ's

Completion Screen

Instant Approval - SMS Notification Message

Dear {member-first}
Your application ID:{application-id} received on {application-date} for {amount} at {supplier} has been approved.
Regards, FAS [please do not reply to this SMS]

Codes

MEMBER FIRST

MEMBER LAST

SUPPLIER NAME

APPLICATION DATE

DATE

AMOUNT

SUPPLIER ADDRESS

SUPPLIER PHONE

APPLICATION ID

Pending Approval - SMS Notification Message

Dear {member-first}
We received your application ID:{application-id} on {application-date}. You will be notified of the outcome of your application within 5 working days.
Regards, FAS [please do not reply to this SMS]

Codes

MEMBER FIRST

MEMBER LAST

SUPPLIER NAME

APPLICATION DATE

DATE

AMOUNT

SUPPLIER ADDRESS

SUPPLIER PHONE

APPLICATION ID

Changed to Approved - SMS Notification Message

Dear {member-first}
Your application ID:{application-id} for {amount} was approved on {date}. It will take up to 10 working days from {date} to process payment.
You will receive a confirmation message once the payment has been made.
Regards, FAS [please DO NOT reply to this SMS]

Codes

MEMBER FIRST

MEMBER LAST

SUPPLIER NAME

APPLICATION DATE

DATE

AMOUNT

SUPPLIER ADDRESS

SUPPLIER PHONE

APPLICATION ID

Changed to Unsuccessful - SMS Notification Message

Dear {member-first}
Your {application-id} has been unsuccessful. Please refer to TAP for more information.
Regards, FAS [please DO NOT reply to this SMS]

The SMS TAB manages all of the automated SMS Messages based on triggers within the application forms based on status settings. The details area can have either generic text or you can use the Codes to pull data automatically from the database of information captured from the hard coded fields like Member First Name, Member Last Name, Supplier Name etc.

Instant Approval



- Instant Approval - this SMS is triggered if the Instant Approval Toggle is on -
- Pending Approval - If the instant approval toggle is not on then all other applications will default to Pending Approval and this SMS message will be sent
- Changed to Approved - this SMS is triggered if the status is changed from from any status to Approved
- Changed to Unsuccessful - this SMS is triggered if any status is changed to Unsuccessful. If a Incomplete Status is not completed within 20 days from the last edited date the status is automatically changed to Unsuccessful and this SMS sent
- Changed to Completed - this SMS is triggered if any status is changed to Completed
- Incomplete Reminder - this SMS is triggered if an application is marked as Finish Later

Application Forms

Edit Application Form

Details

SMS

Form

Suppliers

Members

FAQ's

Completion Screen

Form Fields

Information completed by member

School *

Name of school student is enrolled at



Grade

Items Required *

Enter all items in here

Estimated Cost of Items

Enter Total

Supporting Documentation and Requirements

 Upload Supporting Documents

Elements

Text

Long Text

Number

Select

Radio

Checkbox

File Upload

Date

Heading

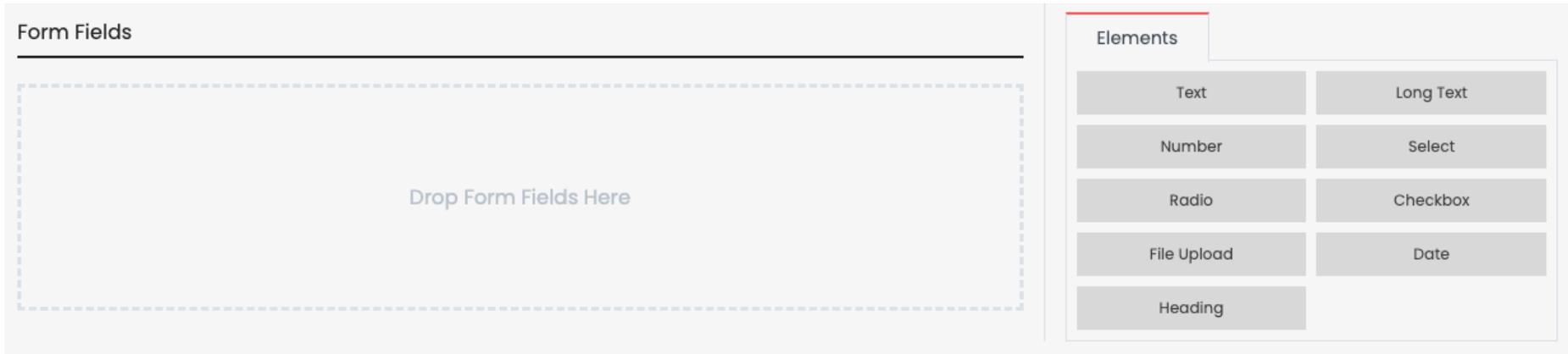
The forms module allows you to create new application form. There are hard coded fields that you can choose to create the form.

Click and drag one of the elements on the right hand side onto the left form field area and release. This puts that field type there and opens up the properties on the right hand side.

Once an Element is dragged to the left, clicking this will open the Properties and options for each field that can be edited.

Generic Functionality Across all the Elements

- Label - is the heading for the field which is seen on the form.
- Placeholder - is text that is placed in the field and replaced when the user starts to type. This is used as a guide to what sort of content can be put into the field.
- Input Mask - is a set of characters which determine how the data can be entered, eg. (XX) XXXX XXXX which will look like this for a phone number when entered (08) 9383 3432
- Help Block - this is a tool tip that provides more information when you hover over the field.
- Required - must be filled in to be able to complete the form.
- Admin Field - if this is turned on then this field is only available to admin to use and is not shown on the CCS App.
- Width - this determines the width of the field. The design of the App is set to 100% so if you want to have two fields on each line you would set each one to 50%.



Text Field

This is a text field in the form where anything can be entered, letters, numbers, syntax.

Details SMS **Form** Suppliers Members FAQ's Completion Screen

Form Fields

Label

Placeholder

Properties Elements

Label

Placeholder

Input Mask

Help Block

Required

Admin Field

Width

100% ▾



Long Text

This field allows for more than one line of inputted text. The field will automatically expand as more content is added.

Number

This field only allows numeric characters to be added.

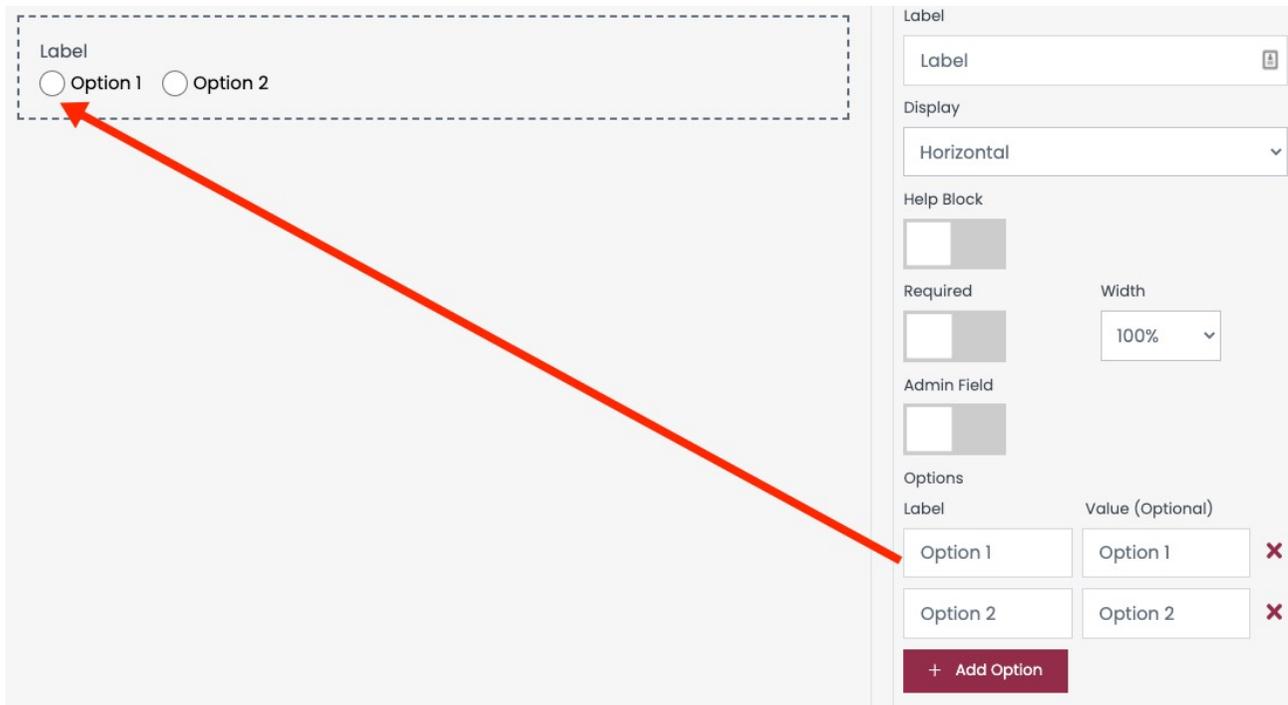
Select (Drop Down) Field

This field allows you to create a drop down field with options. Once the standard parameters are set you have the option to add Labels and Values as per the below. Use the label to populate the option.

Label	Value (Optional)	
<input type="text" value="Option 1"/>	<input type="text" value="Option 1"/>	✘
<input type="text" value="Option 2"/>	<input type="text" value="Option 2"/>	✘
<input type="button" value="+ Add Option"/>		

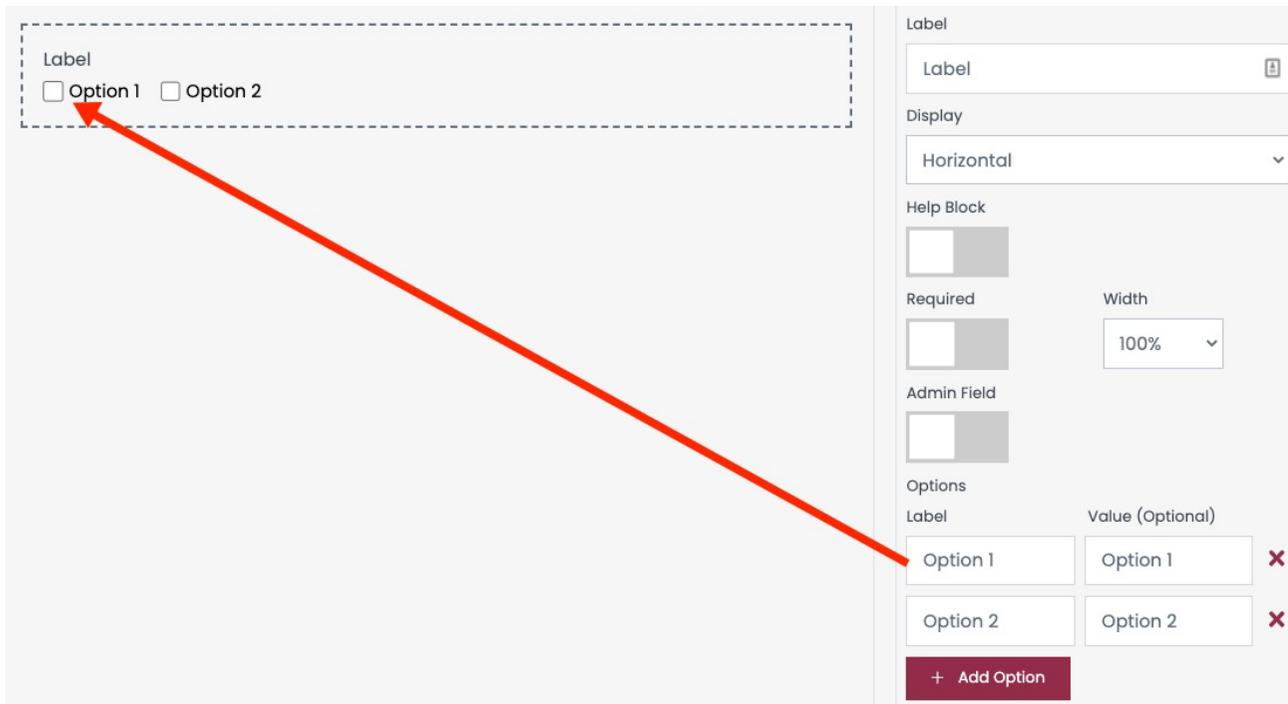
Radio

This field allows you to create options where the user can only select one option. You can add as many options as you want from the properties section.



Checkbox

This field allows you to create options where the user can select multiple options. You can add as many options as you want from the properties section.



File Upload

This field allows the user upload single or multiple files to an application form. We allow the following formats:

- PNG
- JPG
- PDF
- TIFF
- BMP

Date

This field allows the user to input a date from a pop up.

Heading

This field allows you to add a heading so that you can group fields under one or multiple headings. There is no input field when adding a heading.

Notes:

- The properties vary slightly for each field.
- You can change the order of fields by click, hold and drag up and down.
- It is recommended to save on a regular basis not to lose work while creating the forms.

Form Fields

Label

Placeholder 

Properties

Elements

Label

Label

Placeholder



Placeholder

Input Mask

Help Block

Required

Admin Field

Width

100%



Suppliers

New Application Form

Details

SMS

Form

Suppliers

Members

FAQ's

Completion Screen

Supplier Types

Select the Supplier Types available to the user on this Application Form. You can leave this blank and select individual Suppliers below.

Filter Supplier Types by Name...



- NAME
- Accommodation
- Ambulance Cover
- Bill Payment
- Book List / Stationery
- Business Development
- Camping equipment
- Car maintenance
- Chiropractor
- Cleaning Services
- Clothing
- Dental

Suppliers

You only need to select individual Suppliers if you haven't selected any Types above or you want to limit to specific Suppliers in the selected Types.

Filter Suppliers by Name...

<input type="checkbox"/>	NAME	TYPE
<input type="checkbox"/>	JB Hi-Fi Belmont Forum	Electronics, Technology-Laptop/iPad/Tablet
<input type="checkbox"/>	Red Dot Geraldton	Tailored Benefit Program
<input type="checkbox"/>	Eathornes Sportspower Ayr	Clothing
<input type="checkbox"/>	Capricorn Roadhouse	Car maintenance
<input type="checkbox"/>	Country Comfort Inn	Accommodation
<input type="checkbox"/>	Fridge and Washer City - Joondalup	White Goods
<input type="checkbox"/>	Aveley North Primary School	
<input type="checkbox"/>	Barry Evans Furniture and Floor Coverings	

Each form can have a set group of suppliers available as an option to Members when completing the application form. Select from the check box on the left hand side and save.

You can either select a Type which automatically selects all Suppliers associated with that type, or scroll down and choose specific suppliers.

Members

TAP TRUST APPLICATION PLATFORM

David Wolfinger (Administrator)

New Application Form

Save Cancel

Details SMS Form Suppliers **Members** FAQ's Completion Screen

Members (0 selected)

Select the Members who will have access to this Application Form. If none are selected it will be available to All Members.

Filter Members by Name... Member Type

NAME	TYPE	DOB	AGE
<input type="checkbox"/> Aaliyah Fraser	Dependent	06/07/2010	11
<input type="checkbox"/> Aaron Thorne	Member	02/02/1973	49
<input type="checkbox"/> Adalia Calyan	Dependent	01/04/2014	7
<input type="checkbox"/> Adeline Gilla	Spouse		
<input type="checkbox"/> Adrian Gentle	Dependent	02/02/2017	5
<input type="checkbox"/> Aiden Newland (jnr)	Dependent	26/12/2017	4
<input type="checkbox"/> Aiden Newland	Member	28/12/1996	25
<input type="checkbox"/> Aimee Radcliffe	Member	02/04/1998	23
<input type="checkbox"/> Aisha Slater	Member	26/08/2000	21
<input type="checkbox"/> Akeem Kelly	Dependent	16/01/2014	8
<input type="checkbox"/> Akeem Shay	Member	26/02/1999	23
<input type="checkbox"/> Aiana Egerton-Green	Member	28/09/1978	43
<input type="checkbox"/> Albert Curley	Dependent	04/10/2011	10
<input type="checkbox"/> Alberta Newland	Member	10/03/1993	29
<input type="checkbox"/> Aleasha Kent	Member	15/02/1985	37
<input type="checkbox"/> Aleshiah Christensen	Member	14/04/1995	26
<input type="checkbox"/> Alex Barnard	Member	01/08/1996	25
<input type="checkbox"/> Alicia King	Member	03/10/1991	30
<input type="checkbox"/> Alison Gentle	Member	09/06/1967	54
<input type="checkbox"/> Allannah Egan	Spouse	16/05/1991	30
<input type="checkbox"/> Alleiah Newland	Member	13/12/2001	20
<input type="checkbox"/> Alston Kyanga	Dependent	30/10/2013	8
<input type="checkbox"/> Alysea Shay	Member	05/04/1990	31
<input type="checkbox"/> Amanda Shar	Member	23/10/1986	35
<input type="checkbox"/> Amy Carver	Dependent	21/06/2012	9

Active Instant Approval

Suppliers Visible Amount Visible

Single Application

Background Colour

Birth Year From Birth Year To

Icon

javascript:void(0)

The members selection will allow you to choose what Members can see the Application form in the CCS App.

- You can search for specific members
- There is a filter for Members, Dependents or Spouses
- You can enter a Birth Year from and To to allow a age range to see the Application form

FAQ's

New FAQ

Question

Answer

Add FAQ

The FAQ's appear in the CCS App associated with a specific application. You can have unlimited FAQ's

Completion Screen

Details SMS Form Suppliers Members FAQ's **Completion Screen**

What Happens Next

Step 1

Step 2

Step 3

Step 4

Step 5

The completion screen is the view that the Member sees once they have lodged the application. This is used to inform the Member of the next steps of what might occur.

Re-Order

Applications

+ New Application

↕ Re-Order

The reorder functionality allows you to change the order of the applications in the drop down list when adding a new one in [Application Management](#).

COMMUNICATIONS

TAP
TRUST APPLICATION PLATFORM

David Wolfinger (Administrator) ▾

Communications + New Communication

Search

SUBJECT	SENT	SENT BY	SENT TO	ACTIONS
Home COVID Care Kit - All Other Members	23/03/2022 8:14 am	Claire MASIELLO	279	
March 2022 DBT payment confirmation	18/03/2022 2:10 pm	Claire MASIELLO	380	
Home COVID Care Kit - Leonora/Moora/Wiluna/Carnamah	16/03/2022 10:52 am	Claire MASIELLO	12	
Home COVID Care Kit - Meekatharra/Cue/Mt Magnet	16/03/2022 9:32 am	Claire MASIELLO	85	
NEW FORM now available: Adding your spouse and/or dependent child to TAP	09/03/2022 4:04 pm	Mili Liliic	378	
Have you experienced problems attaching documents in the TAP App?	03/03/2022 3:37 pm	Mili Liliic	377	
Distribution - Yugunga-Nya Direct Benefits Trust \$500 March 2022	22/02/2022 3:03 pm	Claire MASIELLO	372	
TAC Election - Result	14/01/2022 4:43 pm	Claire MASIELLO	367	
Geraldton Community Meeting Reminder	10/01/2022 4:08 pm	Claire MASIELLO	355	
WA Government Vaccine Mandate - Impact on Heritage Surveys	21/12/2021 3:37 pm	Claire MASIELLO	349	
Geraldton Community Meeting - Election Notice	20/12/2021 2:20 pm	Claire MASIELLO	348	
YNPL - Trainee Plant Operators Position SMS	17/12/2021 11:28 am	Karlina Piggford	349	
Meekatharra Community Meeting Reminder	15/12/2021 3:43 pm	Claire MASIELLO	349	
Yugunga-Nya Annual Report	16/12/2021 1:47 pm	Claire MASIELLO	349	
Reminder to GET 2022 BOOKLISTS IN	08/12/2021 9:49 am	Warina Wesley	340	

< 1 2 >

Showing 1 to 25 of 35 results

<https://tap-admin.app/news-items>

The communications module is used to send bulk messages to members based on specific filters.

New Communication

Save & Close Send Cancel

Details Recipients (0)

Subject * Type

Message

Recipient Filters

Application Form

Application Status

TAP Status

Supplier Status

Application Used

Member Type

Send to Member (if Spouse/Dependant) No

When creating a bulk SMS the following functionality is available:

Details

- Subject - This is the subject line of the SMS message. This is not sent to the recipients and only used to recognise the name of the bulk message
- Type - this should be set to SMS.
- Message - this is where the message can be typed in

Recipients

- The recipients are updated based on the filters chosen on the right hand side. As you choose one of the filters it automatically updates the number of recipients that are associated with a filter.

Recipient Filters

- The filters can all be used in conjunction with each other.
- If you choose more than one filter, it will add the extra recipients to the list.
- The toggle Send to Member (if Spouse/Dependent) is clicked then if there is a recipient in the system that is associated with a member then the member will receive the message.

You can Save & Close a message and continue working on it later or you can send directly from this screen.

NEWS

TAP
TRUST APPLICATION PLATFORM

David Wolfinger (Administrator) ▾

News Items + New News Item

Search

Search... ✕

TITLE	CREATED BY	MEMBERS	PUBLIC	ACTIONS
HOME COVID CARE KIT	Claire MASIELLO	✓	✓	
HOME COVID CARE KIT	Claire MASIELLO	✗	✗	
YN Direct Benefits Trust Distribution March 2022	Claire MASIELLO	✓	✓	
Your Trust Advisory Committee elected on 12 January 2022	Milii Lilic	✓	✓	
TAC Election Result	Claire MASIELLO	✓	✓	
Election Notice - Geraldton Meeting	Claire MASIELLO	✓	✓	
Christmas Office Notice 2021	Claire MASIELLO	✓	✓	
TAC Nomination List	Claire MASIELLO	✓	✓	
YN Direct Benefit Trust Distribution 2021	Claire MASIELLO	✓	✓	
HOLD on Farmer Jacks Food Voucher Notice	Warina Wesley	✓	✗	
Important YNPT update: new policies	Milii Lilic	✓	✓	
2022 Schooling Year	Warina Wesley	✓	✗	
Search for Lost Members	Warina Wesley	✓	✗	
Election Notice	Claire MASIELLO	✓	✓	
A day of celebration – Yugunga-Nya native title determination	Milii Lilic	✓	✓	

< 1 >

Showing 1 to 20 of 20 results

The news module is used to post news to the Members News section in the TAP App.

- Title is the Heading of the News Article in CCS NEWS

- Created by is who created the News item
- Members - indicates if they can see it in the CCS App or not
- Public - does not require a member to log in to see the News article
- Edit ? Delete Action buttons.

New News

New News Item

Save Cancel

Details

Title *

B *I* [🔗](#) **☰** **☰**

Members No

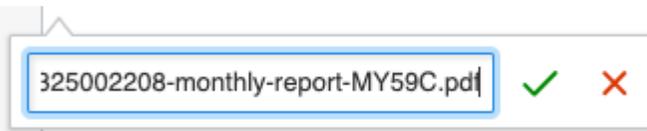
Public No

Upload File

Upload

When adding new news the following functionality is available:

- The title is the heading of the News article in the CCS App
- The body of the News is where you can paste the text, images, links etc.
- If you want to upload a PDF to be viewed, upload first, then click the button on the bottom called Copy Link. Then highlight the text you want to be clickable to the uploaded PDF and click the Attach File Icon 



- Paste the link in and click the tick.
 - Clicking Clear Link removes the link so you can start again to upload a new document.
 - There are two options on publishing the news, Members and Public. If these are both unticked no one can see the news. Members rely on a member to be logged in to see the news, Public does not.
-

CONFIGURATION

SUPPLIERS

Suppliers

Search ✕

+ New Supplier

Start typing for results to update. Minimum 3 letters.

Reset

New Supplier

ID	NAME	TYPE	ACCOUNT TYPE	PHONE	MOBILE	EMAIL	ACTIONS
SUP000511	(INACTIVE) Government Dental Clinic - Geraldton	Dental	Invoice	08 9956 8790			  
SUP000225	10minute Oil Change	Car maintenance	Invoice		0416 429 802	10moc7@gmail.com	  
SUP000412	2 Monkeys Mechancial and Paint Services	Car maintenance	Invoice		0404 266 768	admin@2mmps.com	  
SUP000149	4WD Super Centre - Canning Vale	Camping equipment	Invoice	08 9741 3800		erandall@4wdsupacentre.com.au	  
SUP000787	99 Bikes	Wellbeing	Credit Card	1800 990 523			  
SUP000140	AAAC Towing Pty Ltd	Vehicles, Car maintenance	Invoice	08 9352 5000		info@fasperth.com.au	  

The suppliers module drives the applications that require to be processed using a supplier. This section of the system manages the supplier contact details and rules surrounding payments.

Under actions if you click the VIEW icon  , you will be taken to the Supplier record.

10minute Oil Change Suppliers

Notes

Details Tasks Notes

Tasks

Edit Supplier Details Delete

Edit Close

Supplier Details		Contact Information	
Name	10minute Oil Change	Contact	
Types	Car maintenance	Phone	
Account Type	Invoice	Mobile	0416 429 802
Street Address	916 Albany Highway EAST VIC PARK Western Australia 6101	Email	10moc7@gmail.com
Postal Address		Sales URL	
ABN	97 607 779 359		
Bank Details			
Account Name			
BSB			
Account #			

The various tabs show Tasks that are related to a Supplier and Notes that are recorded against the supplier record.

If you have access privileges you will see the Delete Supplier button under the downward arrow on the top right.

Edit supplier button opens the record for editing.

Edit Supplier

 Save  View  Cancel

Details **Types**

Type of Supplier for fast searching on the App.

Account type options:
Account
Credit Card
Invoice

Supplier Name *

10minute Oil Change

ABN

97 607 779 359

Sale URL

Sale URL

Contact

First Name

First Name

Last Name

Last Name

Email

10moc7@gmail.com

Mobile *

0416 429 802

Phone

Phone

Street Address

Address *

916 Albany Highway

Postal Address

Address

Address

Suburb *

EAST VIC PARK

State *

Western Australia

Suburb

Suburb

State

State

Postcode *

6101

Country *

Australia

Postcode

Postcode

Country

Country

Bank Account

Account Name

Account Name

BSB

BSB

Account Number

Account Number

Account Type *

Invoice

Active

Yes

Status of Supplier

If the Supplier is Active it can be chosen by a member when submitting an application. If inactive is hidden from the application as an option. Full functionality of the Supplier record is still available even when Inactive.

Account type:

- Account - This option is chosen when an account based payment system has been set up with the supplier. Following approval of an application FAS admin send a Custom Supplier Email as the PO. Once the item/s have been provided to the member the Supplier uploads an invoice. The invoice is then paid by the due date or via statement at end of month.
- Credit Card - This option is currently not used against any Supplier.
- Invoice - Suppliers may allow payment of invoices for applications by credit card - however this is done over the phone by FAS admin and the Supplier is requested NOT to retain the credit card details for future use. The account type for all Suppliers that are not on Account is Invoice.

Supplier Types

Supplier types are used to filter suppliers on the Application form. A supplier can belong to more than one Type.

Edit Supplier

Details

Types 

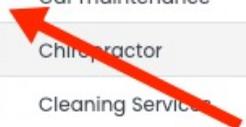
Supplier Types

Select the Types that are applicable to this Supplier.

Filter Supplier Types by Name...



- NAME

- Accommodation
- Ambulance Cover
- Bill Payment
- Birth Certificates
- Book List / Stationery
- Business Development
- Camping equipment
- Car maintenance 
- Chiropractor
- Cleaning Services
- Clothing
- Dental

This is what the Type filter looks like on the App.

Complete Application Form

Supplier Type 

All Types 

Supplier * 

Select 

Supplier Confirmation

When a supplier is chosen on an application form, and the application is approved, FAS admin send a Custom Supplier Email as the PO. The Supplier can then upload their invoice for payment via the link provided in the Custom Supplier Email.

Supplier Notification Rules

- Supplier Payment Status - On Account
- Supplier Payment Status - Credit Card
- Supplier Payment Status - On Invoice

Supplier Notification Template

Sharon & Helen

252 Fifth St, Wonthella
Wonthella 6530
Western Australia Australia

08 9934 6169

info@fasperth.com.au

Hello,

You have received a new purchase order from Fiduciary Administration Services (FAS) ATF Yugunga-Nya People's Trust (YNPT) for Tailored Benefit Program 50+

Application #: TBP50-0279

Member Name: Cheryl Shay

Member ID: M0054

Member DOB: 03/07/1967

Value Approved: \$147

Message

Please provide a \$147.00 food voucher at IGA
WONHELLA– STRICTLY NO ALCOHOL OR
CIGARETTES.

[Click Here Once Completed](#)

Fiduciary Administration Service (FAS Perth)

Hello,

You have arrived at this page due to clicking the work has been completed button. Please confirm the below, or contact us on the above details if there are any discrepancies.

Work has been completed for the following member:

David Wolf (Member ID: 0)

Application ID: EH22-2516

Value of work completed:

100.00

Upload Invoice

 Upload

Confirmation the work has been completed according to the purchase order.

Submit

TYPES

Types

[+ New Option](#) [+ New Group](#) [↕ Re-Order](#)

Search

Group

GROUP	OPTION	COLOUR	ORDERING	ACTIVE	LOCKED	ACTIONS
Application Status Types	Inactive			✓	✓	
Application Status Types	Active			✓	✓	
Application Statuses	Cancelled	#737373	4	✓	✓	
Application Statuses	Pending	#9c4e00	2	✓	✓	
Application Statuses	Incomplete	#9c4e00	3	✓	✓	
Application Statuses	Approved	#054f00	1	✓	✓	
Application Statuses	Completed	#737373	6	✓	✓	
Application Statuses	Unsuccessful	#737373	4	✓	✓	
Communication Types	SMS			✓	✓	
Consent Determination Tuesday 2 November 2021				✓	✗	
Custom Field Models	Member			✓	✗	
Fas Application Statuses	Pending Booking Date	#9c4e00	6	✓	✗	
Fas Application Statuses	Pay Member	#690000	9	✓	✓	
Fas Application Statuses	On Account			✓	✗	
Fas Application Statuses	Pending Birth Cert Copy			✓	✗	
Fas Application Statuses	Paid - Awaiting Supplier Receipt		7	✓	✓	

Types drive all of the options within the system for fields, drop downs, status etc. All of the types are grouped.

For instance if you choose the group Supplier Status's you can see the filtered group below:

Types

+ New Option + New Group ⇅ Re-Order

Search

Search... ✕

Group

Supplier Statuses ✕ ▾

GROUP	OPTION	COLOUR	ORDERING	ACTIVE	LOCKED	ACTIONS
Supplier Statuses	Closed	#737373	5	✓	✓	✎ 🗑
Supplier Statuses	Approved	#054f00	1	✓	✓	✎ 🗑
Supplier Statuses	Completed	#737373	3	✓	✓	✎ 🗑
Supplier Statuses	Pending	#9c4e00	2	✓	✓	✎ 🗑
Supplier Statuses	Pending Supplier Refund	#9c4e00	4	✓	✓	✎ 🗑

As an example, the above is reflected under Application Management:

Application Status *
Pending ✕ ▾

TAP Status *
Pending ✕ ▾

Supplier Status *
Pending ✕ ▲
Approved
Pending
Completed
Pending Supplier Refund
Closed

Each type has a number of different options.

Edit Option

Details Meta

Group * x v

Option *

Active Yes

Abbreviation Value Container

Description

Details show the main information of the Type. You can select a group, Choose hard coded options and other information related to advanced functionality which are required by programmers to achieve specific functionality.

The meta information allows for further functionality like colours etc. This area is also used by programmers for advanced functionality.

If a type is locked, this is done on purpose to maintain the integrity of the data. Once there is data behind a status it cannot be hard deleted.

The reorder function allows the administrator to set the order of the types under a group. As per the below, you can drag and drop the types into the order you require and then click Apply top right to save.

Order Types

✖ Cancel ✔ Apply

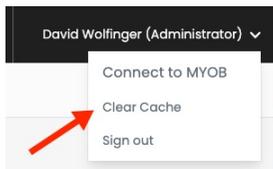
Group

Supplier Statuses ✕ ▾

Types ▲ ↺

Approved	(1)
Pending	(2)
Completed	(3)
Pending Supplier Refund	(4)
Closed	(5)

Ordering takes time to appear in the different areas due to caching. You can clear the cache using the function top right under the profile for the updated settings to appear immediately.



USERS

Users

[+ New User](#)

Search

Group

NAME ▼	GROUPS	EMAIL	MOBILE	ACTIONS
David Wolfinger (Administrator)	Super Administrator	accounts@mozzee.com		
Phil Williams	Proprietors	phil@fasperth.com.au		
Warina Wesley	Management	warina@fasperth.com.au		
Karlina Piggford	Management	karlina@fasperth.com.au	0433 143 769	
Claire MASIELLO	Management	claire@fasperth.com.au	0428 928 747	
Lize Louwrens	Read Only	elouwrens@criterionaudit.com.au		
Mili Liliic	Management	mili@fasperth.com.au		

Users control the access to the administration. Each user record has a number of different tabs to manage the groups, access (menu buttons) and permissions.

The active and inactive toggle turns on and off access.

Edit User

Save View Cancel

Details Groups Access Permissions

First Name * Last Name *

Phil Williams

Email * Mobile Phone

phil@fasperth.com.au Mobile Phone

Password

Password Confirm Password

Leave empty for no change Leave empty for no change

Active

Yes

Details - fields are required to add a user. Adding a new user does not send them a notification that they have been added. This needs to be done manually by an administrator with a higher level of access that allows them to add users.

We also do not allow forgot password for any of the users that access the Administration.

You can assign a user to a group which is a template that has been created based on a specific role and access granted.

Groups

+ New Group

Search

Search...



Type

Select Type...



NAME	DESCRIPTION	TYPE	ACTIVE	ACTIONS
Accountant	Financial Management	System	✓	
Administrator	Administrator System Access	System	✓	
Auditor	Auditor View Access	System	✓	
Employee	Employee Level Access	System	✓	
Management	Administrator Management	System	✓	
Member	Member Level Access	System	✓	
Member Management	Member Management - Don	System	✓	
Proprietors	Owners of the business	System	✓	
Read Only	Read Only	System	✓	
Super Administrator	Highest Level Access	System	✓	

GROUPS

A group is a combination of Access and Permissions that can be assigned to a new user to save adding individual settings.

Edit User

[Details](#)
[Groups](#)
[Access](#)
[Permissions](#)

Adding a user to specific groups allows them to inherit access rights & permissions from those groups. It also allows you to group similar users for use in setting up notifications.

Filter by name...

<input type="checkbox"/>	NAME	DESCRIPTION
<input type="checkbox"/>	Employee	Employee Level Access
<input type="checkbox"/>	Auditor	Auditor View Access
<input type="checkbox"/>	Administrator	Administrator System Access
<input type="checkbox"/>	Member	Member Level Access
<input type="checkbox"/>	Read Only	Read Only
<input type="checkbox"/>	Accountant	Financial Management
<input checked="" type="checkbox"/>	Proprietors	Owners of the business
<input type="checkbox"/>	Management	Administrator Management
<input type="checkbox"/>	Super Administrator	Highest Level Access
<input type="checkbox"/>	Member Management	Member Management - Don

Active

A user can belong to more than one group. The highest level of access privileges is applied to the user based on the permissions of each individual group.

Access determines what buttons you can see on the left hand side of the administration panel. If you edit these, even if a group is chosen, it overrides the access privileges of a group for that particular user. This feature allows you to easily create a specific set of access privileges and permissions for a user after using the starting point of a Group.

- Dashboard
- Members
- Application Management
- Supplier Processing
- Tasks
- Application Forms
- Communications
- News
- Configuration
- Logs

Details Groups Access Permissions

Access Controls give you the ability to grant access to different parts of the system. By default all pages and sections are restricted. The below Access Controls will be specific to this user. This user will also inherit access controls from any groups they have been assigned (inherited Access Controls will not be displayed below)

Filter by name...

ACCESS CONTROL

- Dashboard
- Members
- Application Management
- Supplier Processing
- Tasks
- Reporting
- Application Forms
- Communications
- News
- Configuration
- I__ Suppliers
- I__ Types
- I__ Users
- I__ Groups
- I__ Permissions
- I__ Sections
- I__ Logs
- I__ Templates
- I__ Custom Fields
- Logs

Permissions determine granular level access to functionality within the system. Once again this works in combination with the permissions set up for a group but any change here overrides the group permission settings.

Note that “Destro” means “Delete”

Details Groups Access **Permissions**

The below permissions will be specific to this user. This user will also inherit permissions from any groups they have been assigned (inherited permissions will not be displayed below)

Filter by name...

<input type="checkbox"/>	NAME	DESCRIPTION
<input checked="" type="checkbox"/>	Application Forms > Create	Allow User to view the create new application-form form
<input type="checkbox"/>	Application Forms > Destroy	Allow User to delete application-forms
<input checked="" type="checkbox"/>	Application Forms > Edit	Allow User to view the edit application-form form
<input checked="" type="checkbox"/>	Application Forms > Index	Allow User to view or retrieve all application-forms
<input checked="" type="checkbox"/>	Application Forms > Show	Allow User to view or retrieve a single application-form
<input checked="" type="checkbox"/>	Application Forms > Store	Allow User to save a new application-form
<input checked="" type="checkbox"/>	Application Forms > Update	Allow User to update an existing application-form
<input checked="" type="checkbox"/>	Attachments > Create	Allow User to view the create new attachment form
<input type="checkbox"/>	Attachments > Destroy	Allow User to delete attachments
<input checked="" type="checkbox"/>	Attachments > Edit	Allow User to view the edit attachment form
<input checked="" type="checkbox"/>	Attachments > Index	Allow User to view or retrieve all attachments

Active

PERMISSIONS

This section is part of the system management and should not be touched or edited.

SECTIONS

This access privilege allows the control of what buttons on the left hand menu can be seen by a group. For instance most access privileges should not be able to access the configuration.

There is a lot of functionality tied into this section so I would request support if any changes need to be made.

The image shows a web application interface with a dark sidebar on the left and a main content area on the right. The sidebar contains the following menu items: Dashboard, Members, Application Management, Supplier Processing, Tasks, Application Forms, Communications, News, Configuration (with a dropdown arrow), and Logs. The main content area is titled 'Sections' and features a search bar and a table with two columns: 'NAME' and 'ROUTE'. The table lists various sections and their corresponding routes. Red arrows point from the sidebar items to the corresponding rows in the table: Dashboard to the first row, Tasks to the fifth row, News to the seventh row, and Configuration to the eighth row.

NAME	ROUTE
Dashboard	/dashboard
Members	/members
Application Management	/submissions
Supplier Processing	/supplier-processing
Tasks	/tasks
Reporting	/reporting
Application Forms	/application-forms
Communications	/communications
News	/news-items
Configuration	
-- Suppliers	/configuration/suppliers
-- Types	/configuration/types
-- Users	/configuration/users
-- Groups	/configuration/groups
-- Permissions	/configuration/permissions

TEMPLATES

This section manages the templates for SMS messages & Supplier Custom Email messages.

- [Dashboard](#)
- [Members](#)
- [Application Management](#)
- [Supplier Processing](#)
- [Tasks](#)
- [Application Forms](#)
- [Communications](#)
- [News](#)
- [Configuration](#)
- [Logs](#)

Templates

+ New Template

Search

Type

NAME	TYPE	ACTIVE	ACTIONS
\$100 - application under 100 hundred response	SMS	✓	✎ 🗑
ADD - Confirmation added new Spouse / Dependent	SMS	✓	✎ 🗑
ADD - document for adding Spouse	SMS	✓	✎ 🗑
AF- application approved and can book	SMS	✓	✎ 🗑
Application/Assistance Query	SMS	✓	✎ 🗑
BAN - member due to aggressive/abusive phone calls	SMS	✓	✎ 🗑
Bank Account Request	SMS	✓	✎ 🗑
BC - Birth certificate payment Options	SMS	✓	✎ 🗑
BC/ADD - missing document child	SMS	✓	✎ 🗑
BC/ADD - missing document spouse	SMS	✓	✎ 🗑
COVID Assistance Response & RATS test	SMS	✓	✎ 🗑
David Test - Dont Use	SMS	✓	✎ 🗑
DBT - funds not received UPDATE	SMS	✗	✎ 🗑

When creating a new template the following information needs to be added.

The content codes will automatically put data related to the member or the application depending upon where the message is being sent from.

New Template

Details

Name *

Heading used to identify the template when selecting from the send SMS icons.

Type

SMS

SMS

Supplier Message

SMS and Supplier message option

Active

 No

Active can be used, Inactive cannot be seen in the template drop down.

SMS Template

Hello {first} {last}

We have this mobile phone number {mobile} for you.

SMS content area

First Name	Last Name	Member Mobile	Member Address	Submission ID	Submission Status	Submission Amount	Supplier Name
------------	-----------	---------------	----------------	---------------	-------------------	-------------------	---------------

Content Codes

AUTOMATED AND MANUAL NOTIFICATIONS

Bank Details - When the bank details of a member, spouse or dependent are changed either in the App or by Admin, a notification is sent out to info@fasperth.com.au This email address is hard coded and needs to be changed by the programmer.

The member can request a change of mobile which is sent to info@fasperth.com.au A member cannot edit their own mobile number in the system. Once requested, an administrator can change the number under the member record.

Automated SMS messages

Automated SMS messages are sent based on all applications that are submitted or when the option Finish Later is selected by the member.

If a status is changed by Admin, the relevant message will also be sent automatically.

CCS APP

Log In

The log in screen for the Member App can be accessed via ynpt.app

To log in the member enters their mobile phone number and clicks Send Code to Phone. This triggers a SMS with a 6 digit code for single use access. The code must be used within 5 minutes to access the system.

The other options are CALL which calls the 1800 001 260 phone number and EMAIL which opens a email program on the members phone and populates the To: field with the email address info@fasperth.com.au

A member cannot update their own mobile phone number but can request this to be actioned by an administrator by filling in the form on the login screen. Once this is filled in the details are emailed to info@fasperth.com.au



**Custodian
Community**

LOG IN - Step 1

Mobile Number

Send Code to Phone

LOG IN - Step 2

Enter Code

Log In

Help



Call



Email



New or Lost Mobile Number?

Dashboard

The dashboard shows the different statuses of the applications that a member has lodged. You can access these directly by clicking the magnifying glass.

Start New Application links to the Application Landing page.



**Custodian
Community**

Menu

Member: David Wolf

Pending	1	🔍
Approved	0	🔍
Incomplete	1	🔍
Completed	1	🔍

Start New Application

Menu Drop Down



**Custodian
Community**

Menu

LOG OUT

CLOSE



Go to my Dashboard

Start New Application

Application Status

My Profile

News

Start New Application

Start New Application displays all the applications that are available to that member.

FAQ's opens the screen with information pertaining to the application that has been [set up by Admin](#) when creating a new application.

GO takes the member to the next screen.



**Custodian
Community**

Menu

Member: David Wolf

New Application

Select application below to start



Adding your spouse
and/or dependent child
to TAP

Limit N/A

Remaining N/A

FAQ'S

GO



Advancement Fund (was
Emergency Hardship)

Limit \$1,200.00

Remaining \$1,200.00

FAQ'S

GO



Funeral Assistance

PBC

Membership - Yugunga-

Step 1

This is the first step when starting a new application. This step is essentially to confirm that the contact details are correct for the member before progressing through to the application.



**Custodian
Community**

Menu

LOGGED IN: David Wolf

Wednesday August 3 2022

STEP 1



Adding your spouse and/or dependent
child to TAP



Limit \$0.00

[FAQ's](#)

Remaining \$0.00

Please confirm your details below are correct

Name: David Wolf

Mobile: 0400 444 038

Email: ryan+membertest@niftee.com.au

Address:

7 Martin Court

Mosman Park

Step 2

This step contains all the fields that have been set up in the [Application Form](#) by admin.

The **red asterisk (*)** indicates if the field is mandatory.



**Custodian
Community**

Menu

LOGGED IN: David Wolf

Tuesday August 9 2022

STEP 2



Adding your spouse and/or dependent
child to TAP



Limit \$0.00

[FAQ's](#)

Remaining \$0.00

Complete Application Form

Are you adding a partner or a dependant
child *

Please select



First name of spouse or child *

First Name

Surname of spouse or child *

The member has the option to either complete the application all at once or Finish Later if they do not have all the documentation/information available at the time of starting the application. If the member decides to Finish Later, the application is moved to the Incomplete section on the dashboard. They can click this to go back and complete the application at any time.

Note: An incomplete application automatically closes after 21 days if it has not been completed by the member.

The Submit Form button will only be highlighted if the member has completed all the mandatory fields of the application.

Incomplete Application Form

Please complete all required fields

Finish Later

Submit Form

Completed Application Form - can be submitted

Finish Later

Submit Form

Step 3 - Final Screen

Once the application form is submitted the member is taken to a completion screen that summarises the application and also has information about “What happens next?” This information comes from the [Completion Screen section in the Application Form](#).

Adding your spouse and/or dependent child to TAP



Status: Pending

Application Submitted: Monday August 8 2022

Thank you for submitting the Adding your spouse and/or dependent child to TAP Application.

What happens next?

1. We will assess your application for approval and will advise you via SMS.
2. You do not need to call the office as you have successfully completed the application.
3. We will let you know via SMS message when your application is approved.
4. For more information visit our FAQs section.
5. For all other enquiries please email info@fasperth.com.au

[Back to Dashboard](#)

Application Status

The application status screen shows all historical and current application form statuses. The member can filter using the radio buttons.

The magnifying glass pops up for all applications, however only those applications with a status of Incomplete can be edited..



LOGGED IN: David Wolf

Tuesday August 9 2022

Application List and Status

Filter by:

- All
- Pending
- Approved
- Incomplete
- Completed
- Unsuccessful

All Applications 

08/08/2022

ADD234659

Adding your spouse and/or dependent child to TAP

Status: Pending



My Profile

The member can edit their profile at any time. The only fields that cannot be edited are the members First and Last Name and their mobile phone number as this is being used to log in and requires an administrator to update this. The member can notify CCS of a new mobile number from the [login screen](#).

If the member has spouses or dependents under their record a drop down will appear allowing the member to edit the profiles of the associates.



Custodian
Community

Menu

LOGGED IN: David Wolf

Tuesday August 9 2022

Member: David Wolf

Personal Details

Member ID: 0

DOB: 19/01/1968

First Name *

David

Last Name *

Wolf

Email

david@gmail.com

News

The news that members can see is driven by the [News section created by Admin](#). By clicking the news item, the screen refreshes to the News item.



**Custodian
Community**

Menu

LOGGED IN: David Wolf

Tuesday August 9 2022

News

Date: 08/08/2022

URGENT - YN PBC - Reminder to Apply for
Membership

Date: 13/07/2022

Advancement Fund

Date: 30/06/2022

Policy changes and ambulance update -
effective from 1 July 2022

