

# CaseTrust

USER MANUAL

SUBMITTED BY



Automate • Engage • Transform

## Document History

Version	Date	Author	Comments / Changes
0.1	17-Feb-2023	Aprajita Kumari	Initial version of the User Manual
0.2	22-Feb-2023	Moumita Basu	Review Comment Fixed Version

## Reviewed By (TeBS)

Name	Designation	Signature & Date

## Reviewed By (CASE)

Name	Designation	Signature & Date

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## 1 Introduction

CaseTrust is the Consumer's Association of Singapore's (CASE) department for accreditation of business or companies who have made a commitment towards fair trading and transparency to consumers.

This document shall describe the business context and user requirements of the CaseTrust team. The features indicated here are intended to provide the functionalities, capabilities and work flow of the new system to capture Application, Assessment and Accreditation process.

## 2 CaseTrust System Overview

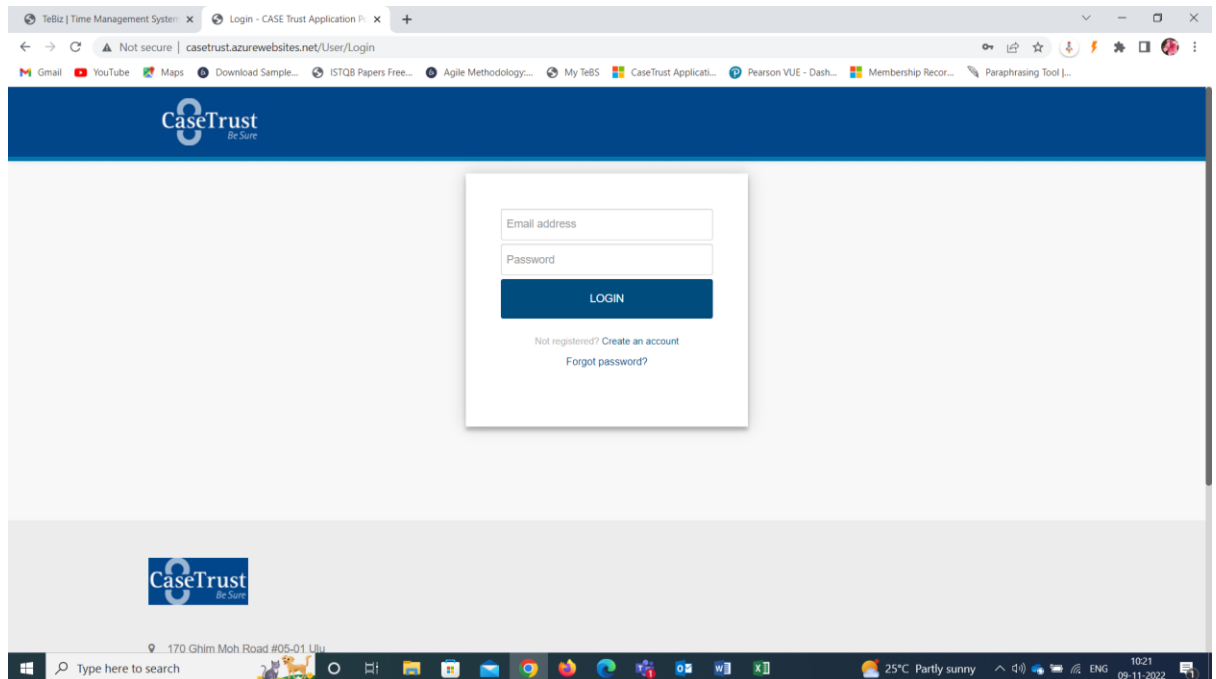
### 2.1 Scope

The CaseTrust system shall receive online submissions from businesses who wish to be CaseTrust accredited, to demonstrate their commitment towards their consumer for fair trading practices. It will go through a process of submitting application documents along with approvals or rejections performed in the system by key users of the CaseTrust team. The system shall also accommodate assessment activities through Accreditation process, based on certain guidelines as set forth in the guidelines of CaseTrust Singapore.

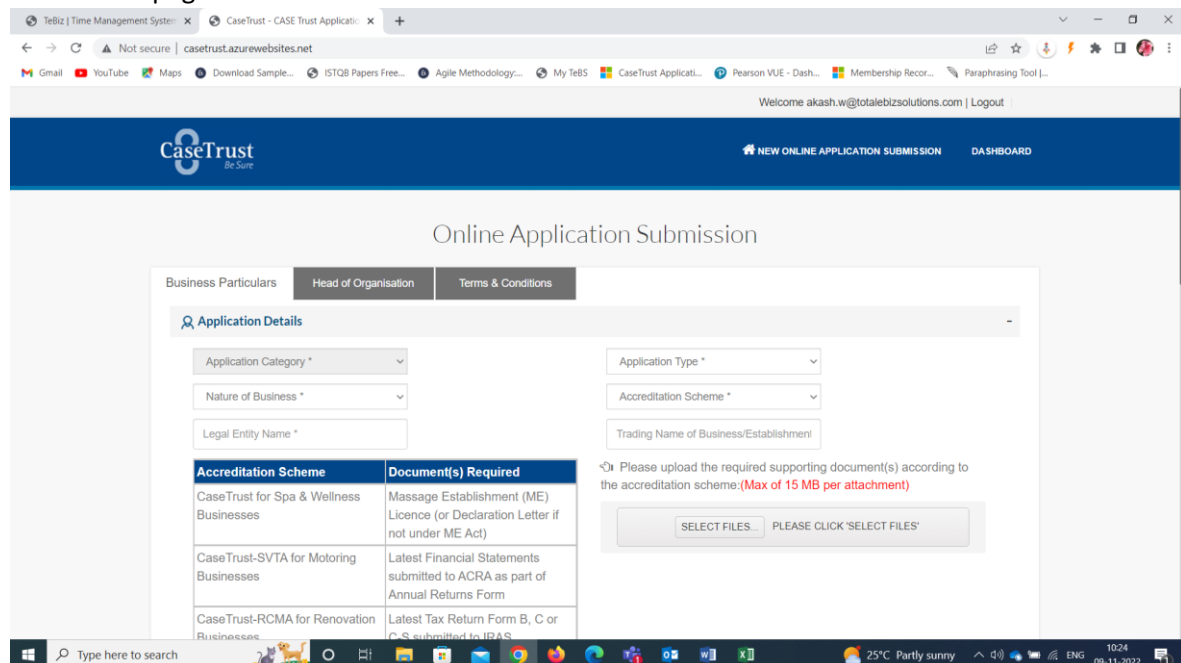
Scope of this project is to create a new system in CRM Dynamics 365 system to manage the CaseTrust Accreditation process, a portal for business to submit application and supporting documents submissions and Events Registrations and a portal for Assessment organizations to manage and submit the assessment process.

## 3 Submission of CaseTrust Application from Business Application Portal

User will navigate to the portal URL and login to their account by entering valid mail id and Password.

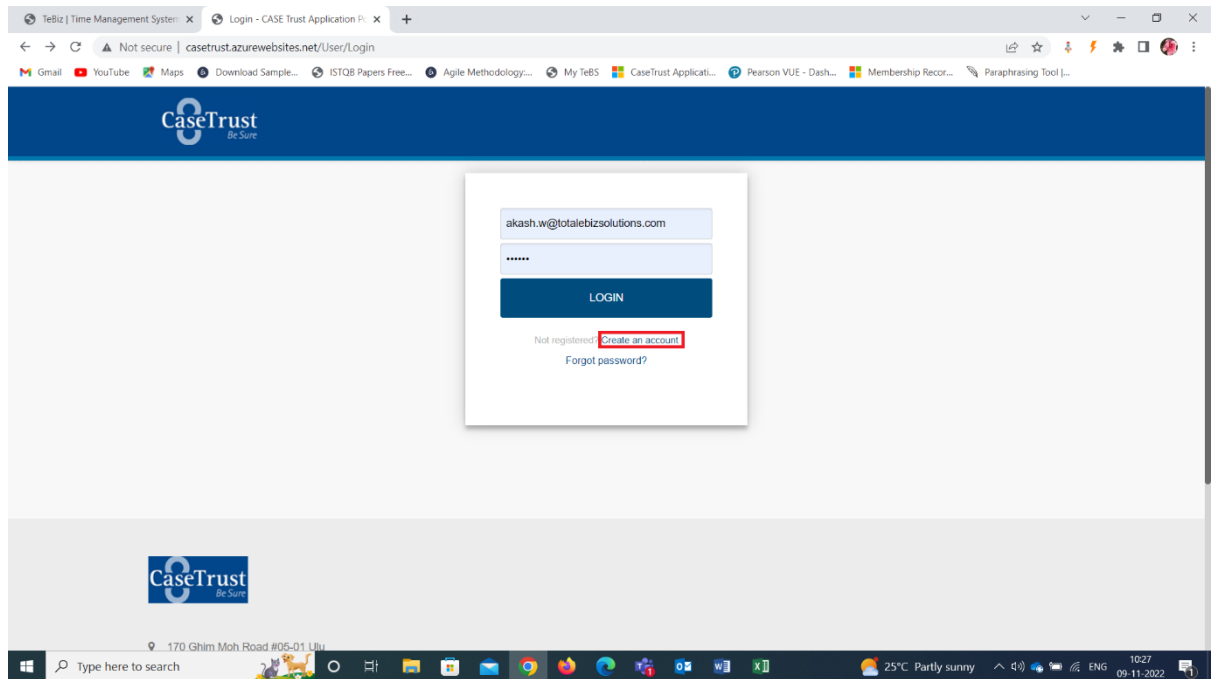


- After clicking on login button system will direct user to Online Application Submission page.

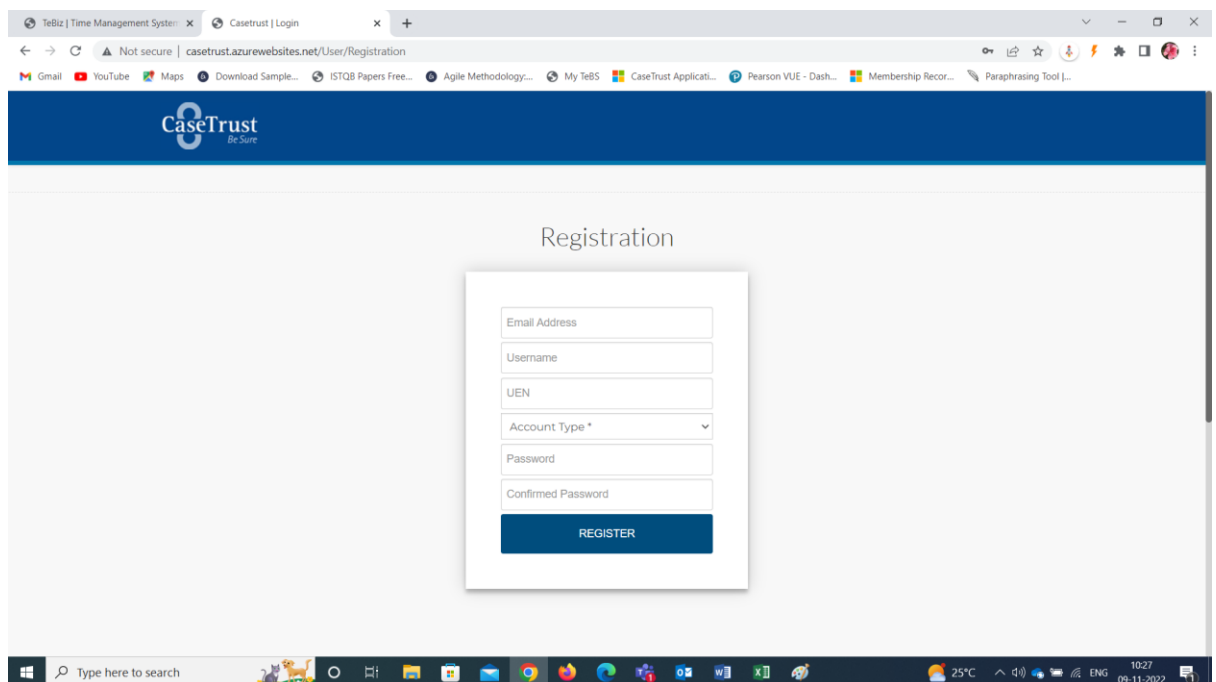


Accreditation Scheme	Document(s) Required
Case Trust for Spa & Wellness Businesses	Massage Establishment (ME) Licence (or Declaration Letter if not under ME Act)
CaseTrust-SVTA for Motoring Businesses	Latest Financial Statements submitted to ACRA as part of Annual Returns Form
CaseTrust-RCMA for Renovation Businesses	Latest Tax Return Form B, C or C-S submitted to IRAS

On Login page a new user can click on “Create Account” and System will direct him/her to Registration page.

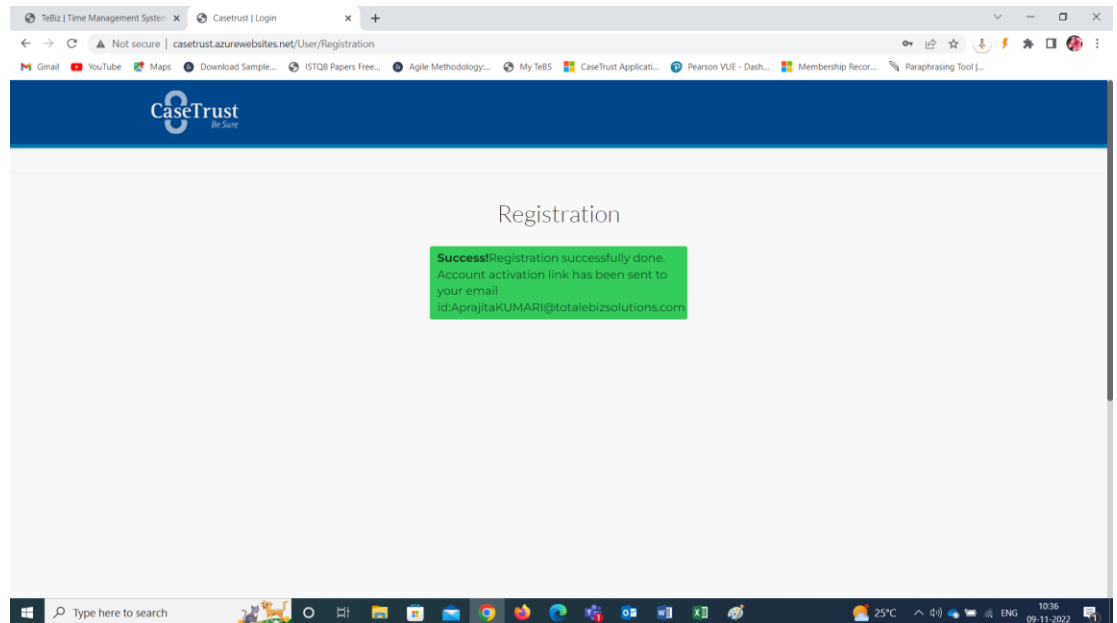


The screenshot shows the CaseTrust login interface. At the top, there's a blue header with the CaseTrust logo and the tagline "Be Sure". Below the header, there's a white login box. Inside the box, there's a text input field for the email address containing "akash.w@totalebizsolutions.com", a password input field with masked characters "\*\*\*\*\*", and a blue "LOGIN" button. Below the login fields, there's a link "Not registered? [Create an account](#)" and a link "Forgot password?". The background of the page is light gray with a faint CaseTrust logo.



The screenshot shows the CaseTrust registration interface. At the top, there's a blue header with the CaseTrust logo and the tagline "Be Sure". Below the header, there's a white registration box. Inside the box, there's a title "Registration" at the top. Below the title, there are several input fields: "Email Address", "Username", "UEN", "Account Type\*" (a dropdown menu), "Password", and "Confirmed Password". At the bottom of the box is a blue "REGISTER" button. The background of the page is light gray with a faint CaseTrust logo.

- User will fill all the Mandatory fields and click on Register, system will display below message and a mail with a verification link will be sent to the user mail id with which he/she created the account:



Reply Reply All Forward IM  
Wed 09-11-2022 11:40  
CRM Administrator <crmadmin@case.org.sg>  
**Your account is successfully created!**  
To: Aprajita Kumari  
If there are problems with how this message is displayed, click here to view it in a web browser.

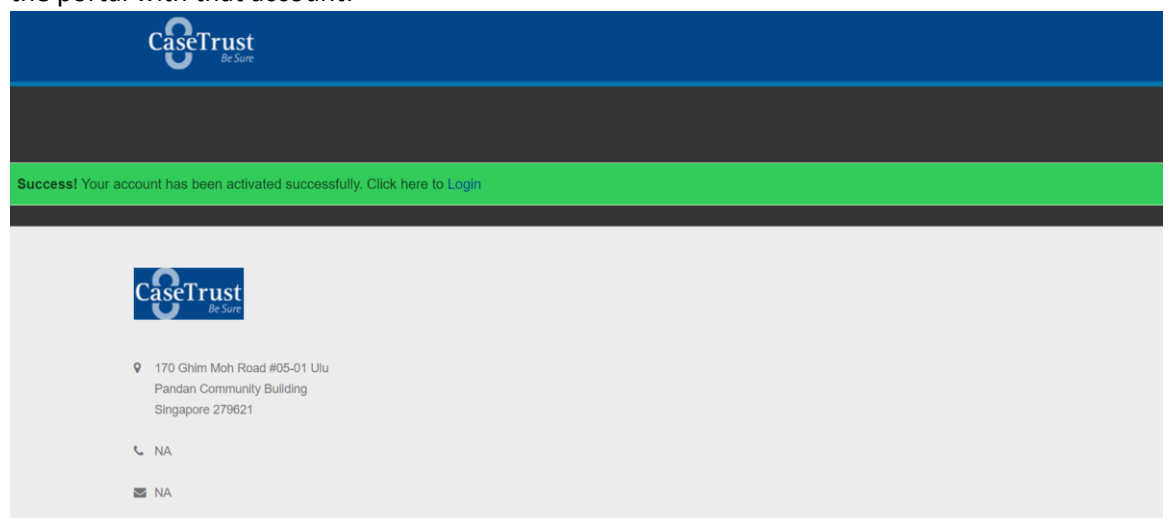
**CAUTION:** This email originated from outside of the organization. Do not click on links or open attachments unless you recognize the sender and know the content is safe.

Hi Aprajita,

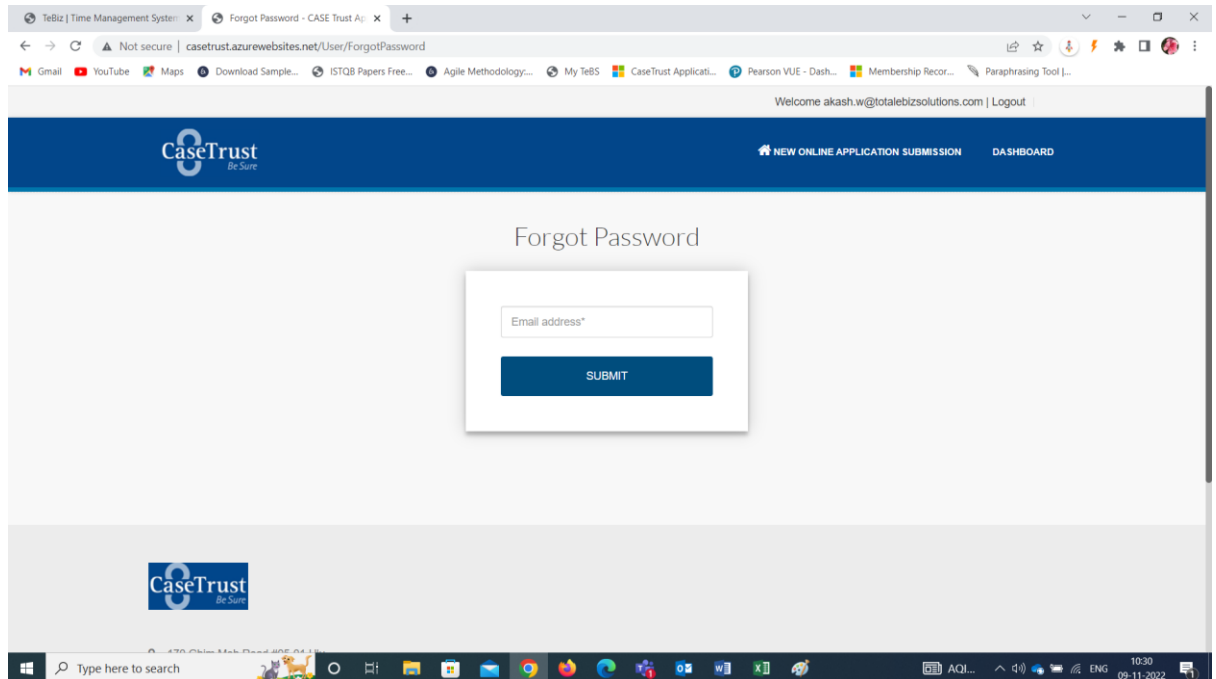
We are excited to tell you that your account is successfully created. Please click [here](#) to verify your account.

Regards,  
System Admin.

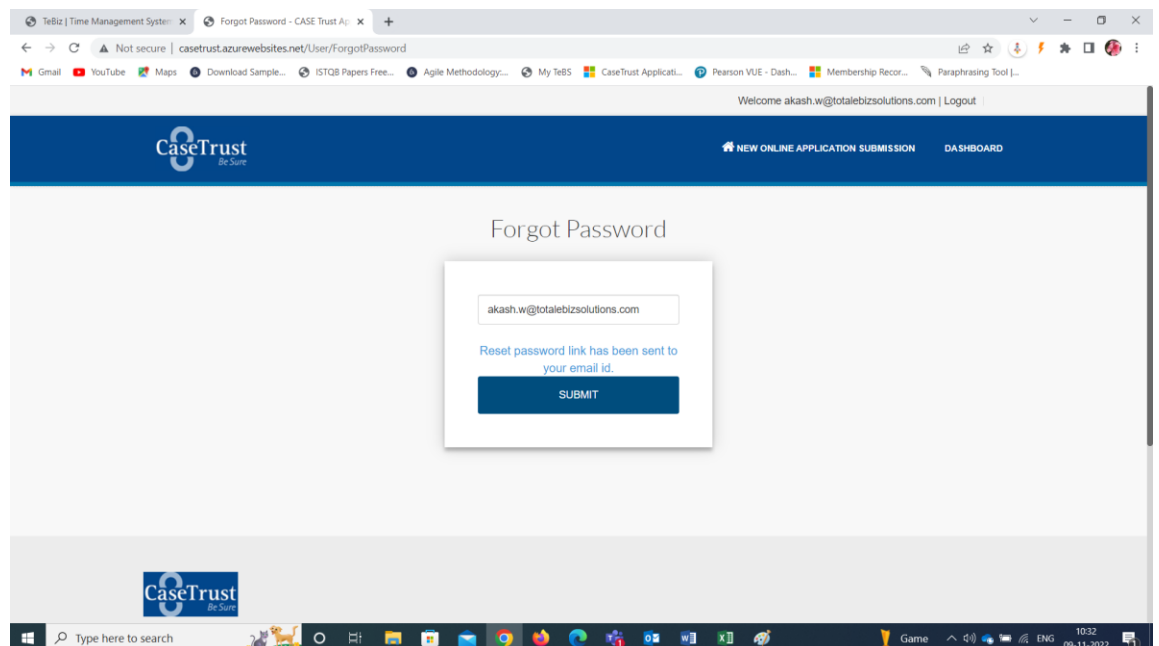
- After clicking on it system will display below page and user will be able to login from the portal with that account:



If User will forget the password, he/she can click on “Forgot Password” and the system will direct user to forgot password page.



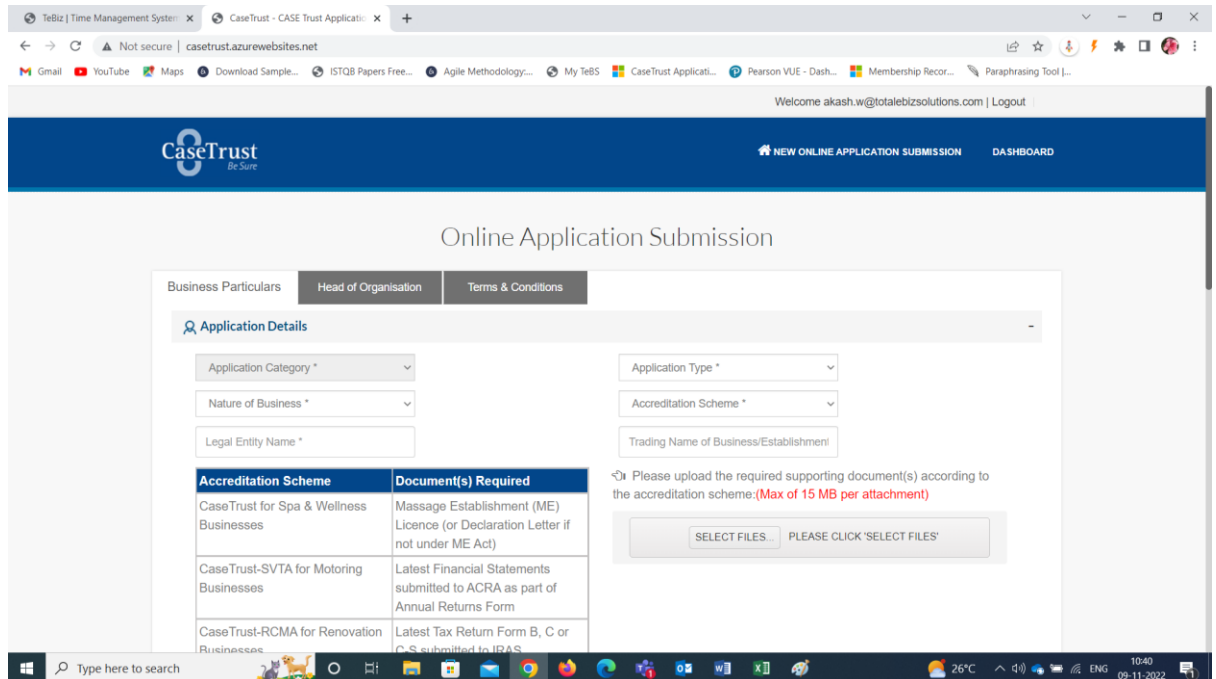
- User have to enter registered email address and click on submit button. System will send Reset password link to user’s mail id with below message displayed on the screen.



- User will go to the mail id and reset password by using that link.



Once user logged in successfully system will display “Online Application Submission” page where user have to fill all the mandatory fields which are marked as “\*”.



TeBiz | Time Management System | CaseTrust - CASE Trust Application |

Not secure | casetrust.azurewebsites.net

Welcome akash.w@totalbizsolutions.com | Logout

CaseTrust Be Sure

NEW ONLINE APPLICATION SUBMISSION DASHBOARD

## Online Application Submission

Business Particulars Head of Organisation Terms & Conditions

Application Details

Application Category \* Application Type \*

Nature of Business \* Accreditation Scheme \*

Legal Entity Name \* Trading Name of Business/Establishment

Accreditation Scheme	Document(s) Required
CaseTrust for Spa & Wellness Businesses	Massage Establishment (ME) Licence (or Declaration Letter if not under ME Act)
CaseTrust-SVTA for Motoring Businesses	Latest Financial Statements submitted to ACRA as part of Annual Returns Form
CaseTrust-RCMA for Renovation Businesses	Latest Tax Return Form B, C or C-S submitted to IRAS

Please upload the required supporting document(s) according to the accreditation scheme: (Max of 15 MB per attachment)

SELECT FILES... PLEASE CLICK 'SELECT FILES'

Type here to search

26°C 10:40 09-11-2022

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CaseTrust - CASE Trust Application

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Gmail YouTube Maps Download Sample... ISTQB Papers Free... Agile Methodology... My TeBS CaseTrust Applicati... Pearson VUE - Dash... Membership Recor... Paraphrasing Tool

Business Particulars
Head of Organisation
Outlet
Terms & Conditions

### Application Details

CaseTrust Basic
Required
New

Bridal
CaseTrust for Spa & Wellness Busine

Bridal Ltd.
Bridal Ltd.

SmallSales Turnover <\$1M, Non - Gt

Accreditation Scheme	Document(s) Required
CaseTrust for Spa & Wellness Businesses	Massage Establishment (ME) Licence (or Declaration Letter if not under ME Act)
CaseTrust-SVTA for Motoring Businesses	Latest Financial Statements submitted to ACRA as part of Annual Returns Form
CaseTrust-RCMA for Renovation Businesses	Latest Tax Return Form B, C or C-S submitted to IRAS
CaseTrust for Renovation Businesses	
CaseTrust for Storefront (Basic & Gold)	
CaseTrust-HACOS for Hair & Cosmetology Businesses	

Please upload the required supporting document(s) according to the accreditation scheme:(Max of 15 MB per attachment)

SELECT FILES... PLEASE CLICK 'SELECT FILES'

(www.entrance-exam.net)

Type here to search

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CaseTrust - CASE Trust Application

Not secure | casetrust.azurewebsites.net

Gmail YouTube Maps Download Sample... ISTQB Papers Free... Agile Methodology... My TeBS CaseTrust Applicati... Pearson VUE - Dash... Membership Recor... Paraphrasing Tool

Directors

Director Name \*
Directors/Owners NRIC \*

Particulars of Business

Address Registered with ACRA

Additional Information

Consultants

Previous Next

CaseTrust
Be Sure

170 Ghim Moh Road #05-01 Ulu

Type here to search

Game

TeBiz | Time Management System | CaseTrust - CASE Trust Application | casestrust.azurewebsites.net

Samuel S8383838

**Particulars of Business**

Please enter outlet address, if you are applying for CaseTrust for Spa & Wellness Business Scheme.

Please enter showroom address, if you are applying for CaseTrust for any other Scheme.

Block/House Number \* Required Unit Number

Street Name \* Required Building Name

Postal Code \* Required Contact Number \*

E-mail Address \* FAX Number

UEN No \* Website URL

Salutation \* Given name \* Surname \*

Designation of Contact Person \* Contact Person's Contact No \*

Alternative Contact Number Email of Contact Person \*

1 2

abc xyz

562156 76327637

sam@gmail.com 87

33322233L www.bridals.com

Ms. Moana J

CO 78368732

32673672 moana@gmail.com

Business Profile(Max of 15 MB per attachment)

SELECT FILES PLEASE CLICK 'SELECT FILES'

(WWW.ENTRANCE-EXAM.NET)...

**Address Registered with ACRA**

Same As Showroom/Outlet address ☒ NO

- Click on radio button “NO” to “Yes” if you want same as showroom/outlet. If user want different address to register with ACRA the he/she have to enter it manually.

Business Profile(Max of 15 MB per attachment)

SELECT FILES... PLEASE CLICK 'SELECT FILES'

(WWW.ENTRANCE-EXAM.NET)...

Address Registered with ACRA

Same As Showroom/Outlet address

Block/House Number \* Required Unit Number

Street Name \* Required Building Name

Postal Code \* Required

Additional Information

Consultants

Previous Next

Business Profile(Max of 15 MB per attachment)

SELECT FILES... PLEASE CLICK 'SELECT FILES'

(WWW.ENTRANCE-EXAM.NET)...

Address Registered with ACRA

Same As Showroom/Outlet address

1 Required 2

abc Required xyz

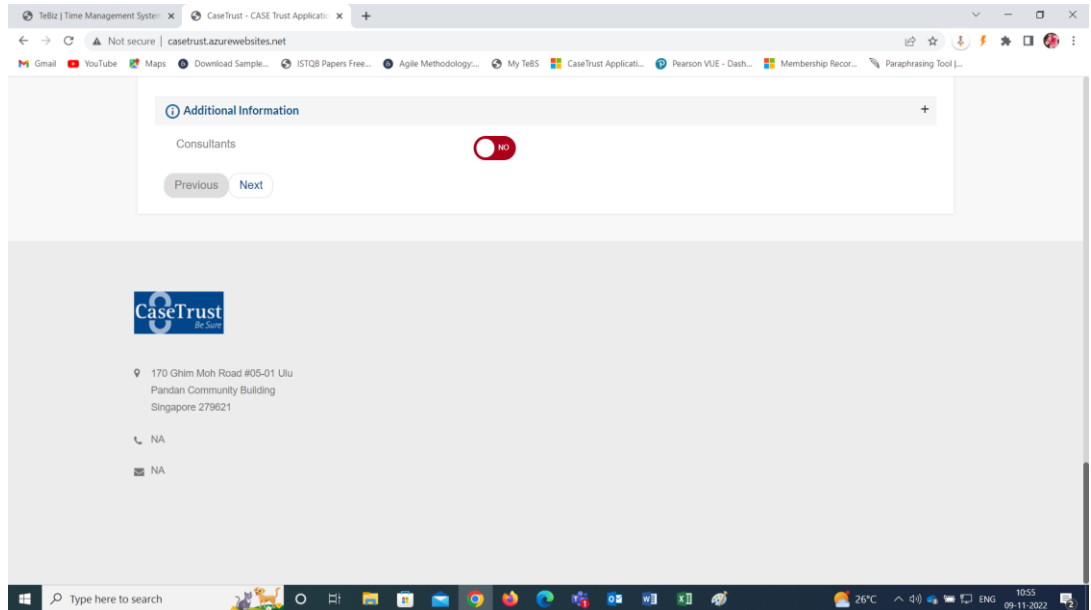
562156 Required

Additional Information

Consultants

Previous Next

- Click on "+" button



Additional Information

Consultants ☒ NO

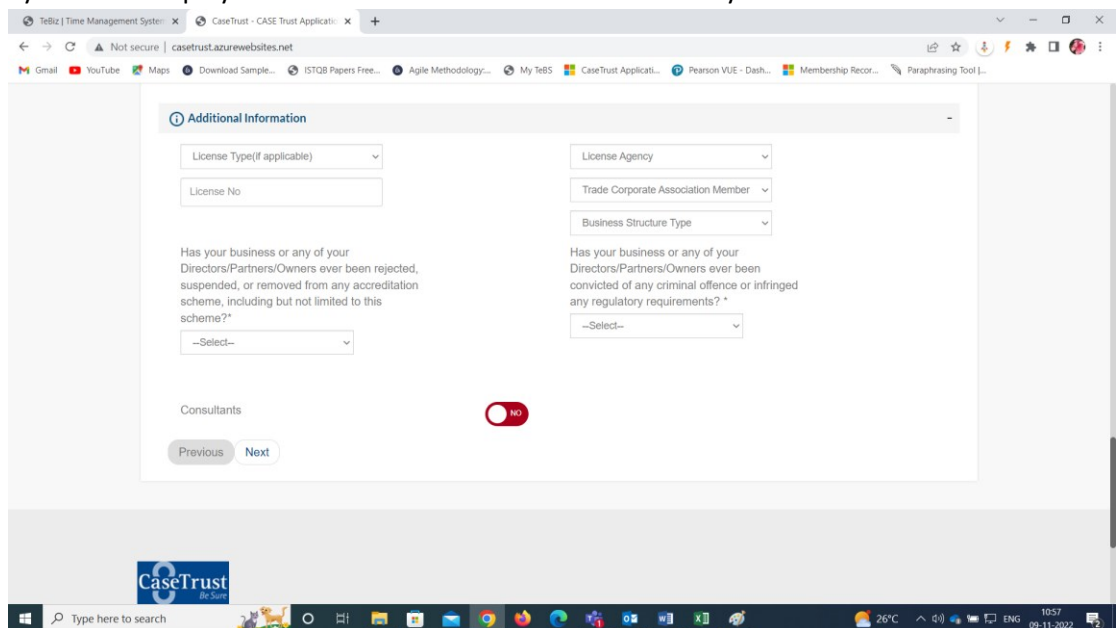
Previous Next

**CaseTrust**  
Be Sure

170 Ghim Moh Road #05-01 Ulu  
Pandian Community Building  
Singapore 279621

NA  
NA

- System will display Additional information field to be filled by user.



Additional Information

License Type(if applicable)

License No

License Agency

Trade Corporate Association Member

Business Structure Type

Has your business or any of your Directors/Partners/Owners ever been rejected, suspended, or removed from any accreditation scheme, including but not limited to this scheme?\*

--Select--

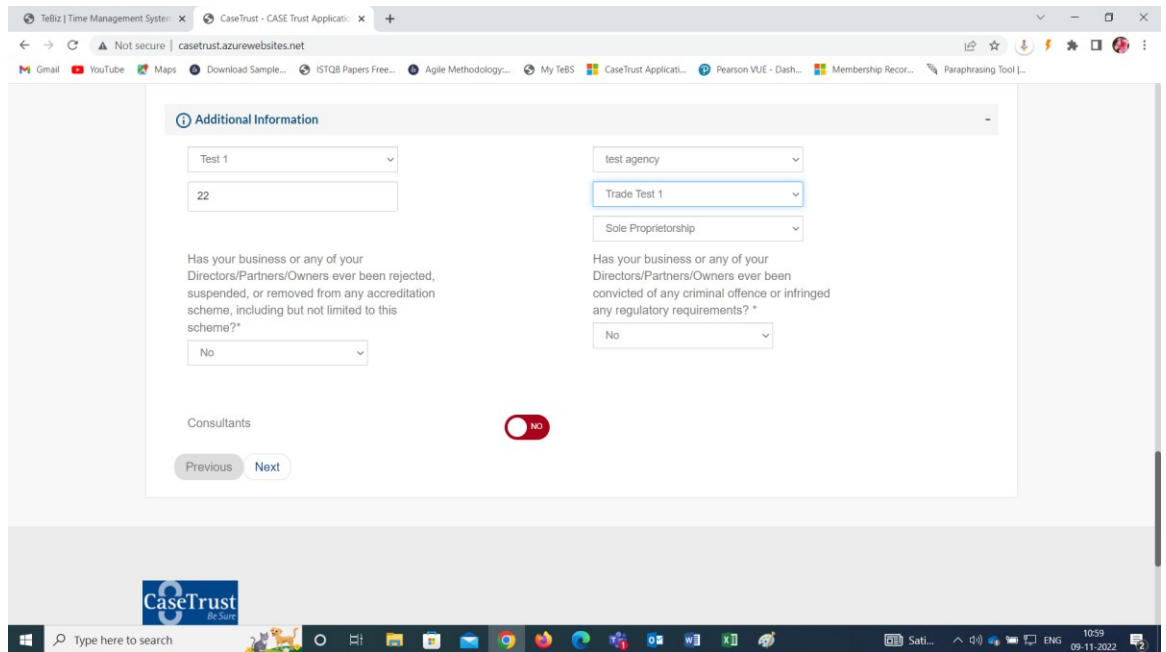
Has your business or any of your Directors/Partners/Owners ever been convicted of any criminal offence or infringing any regulatory requirements? \*

--Select--

Consultants ☒ NO

Previous Next

**CaseTrust**  
Be Sure



**Additional Information**

Test 1

test agency

Sole Proprietorship

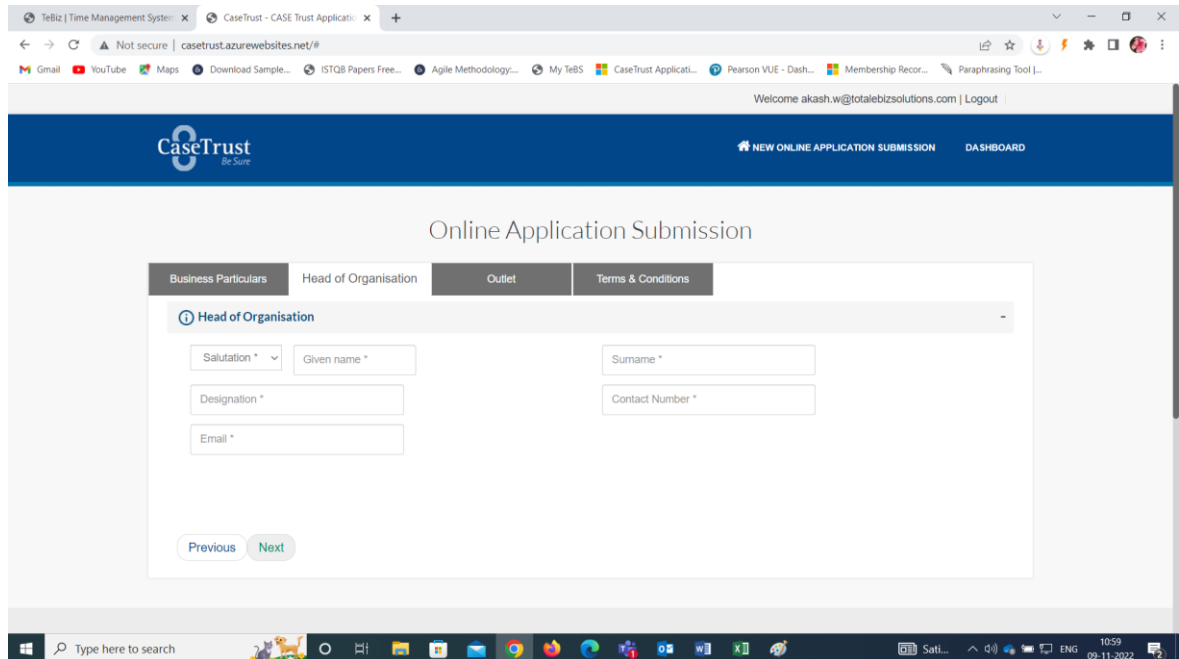
Has your business or any of your Directors/Partners/Owners ever been rejected, suspended, or removed from any accreditation scheme, including but not limited to this scheme?

Has your business or any of your Directors/Partners/Owners ever been convicted of any criminal offence or infringed any regulatory requirements?

Consultants ☐

[Previous](#) [Next](#)

- Click on “Next” button. System will direct you to next tab to fill the “Head of Organisation” details.



Welcome akash.w@totalbizsolutions.com | Logout

**CaseTrust** Be Sure

[NEW ONLINE APPLICATION SUBMISSION](#) [DASHBOARD](#)

**Online Application Submission**

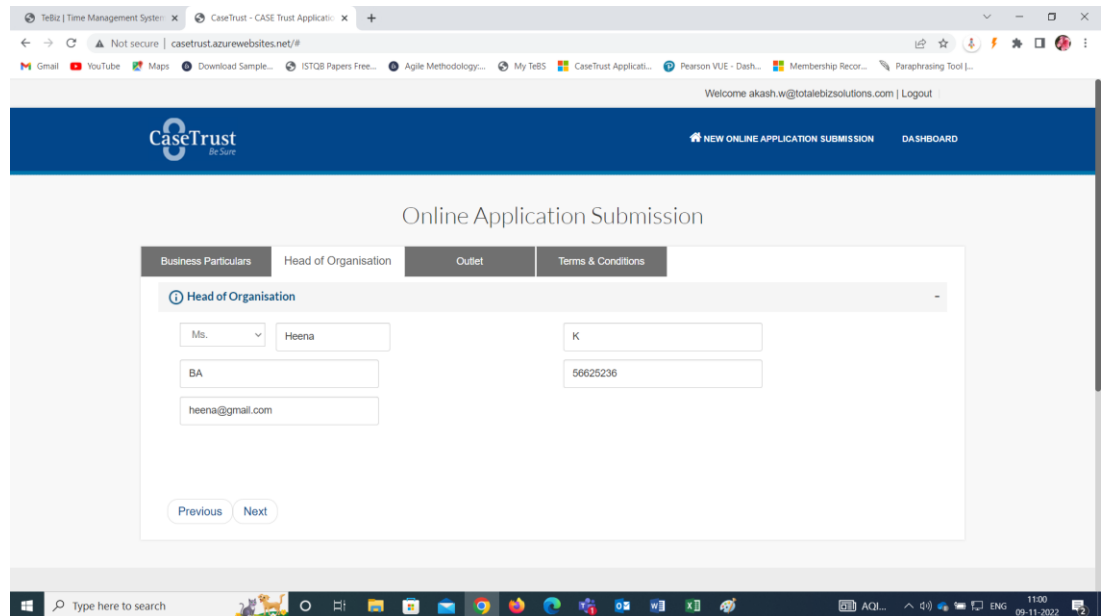
**Head of Organisation**

Salutation \*

Surname \*

Contact Number \*

[Previous](#) [Next](#)

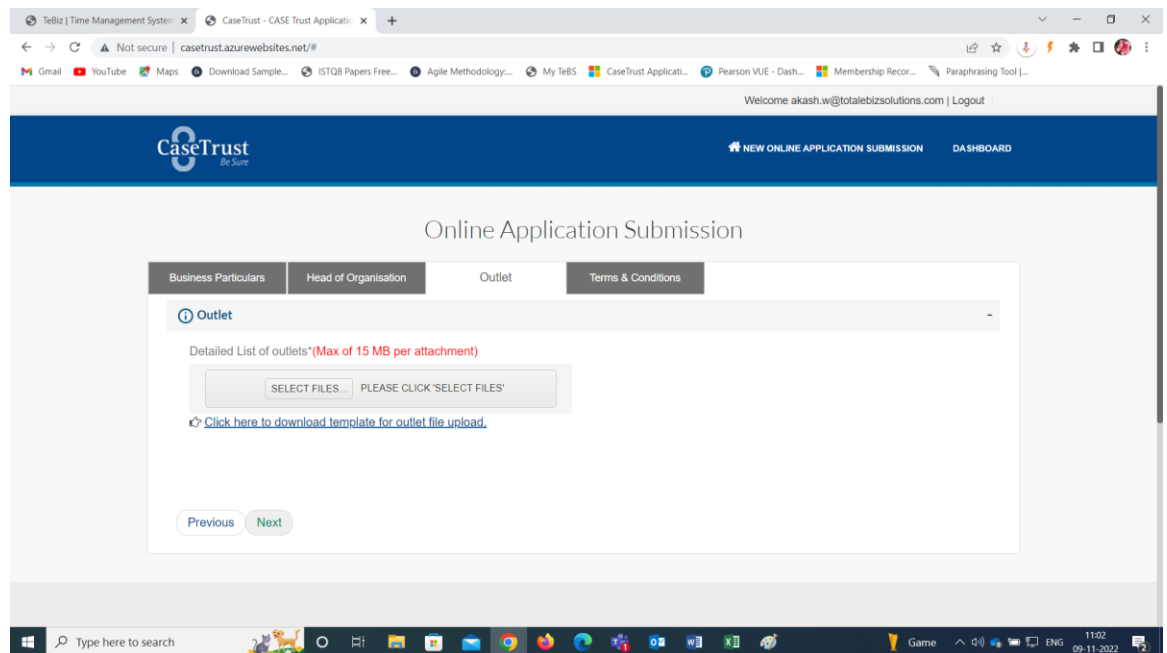


The screenshot shows the 'Head of Organisation' tab in the 'Online Application Submission' process. The form includes the following fields:

- Ms.** (dropdown menu)
- Heena** (text input)
- K** (text input)
- BA** (text input)
- 56625236** (text input)
- heena@gmail.com** (text input)

At the bottom of the form, there are 'Previous' and 'Next' buttons.

- Click on next button after filling all the mandatory fields in Head Of Organisation page. System will direct user to next tab “Outlet” where user have to upload “Detailed list of Outlets”

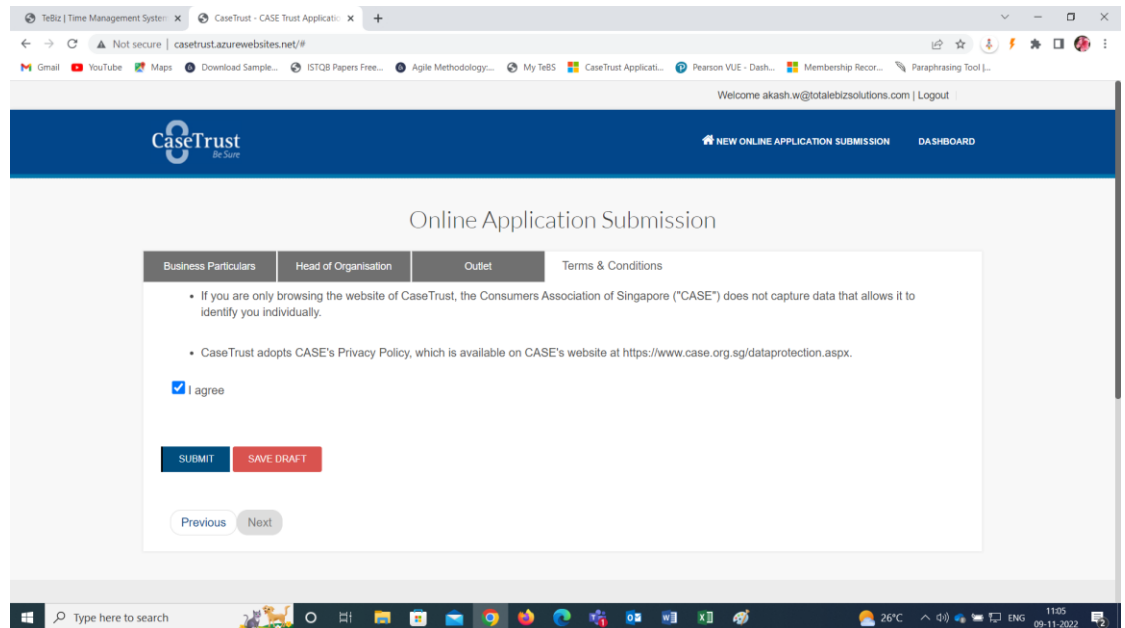


The screenshot shows the 'Outlet' tab in the 'Online Application Submission' process. The form includes the following elements:

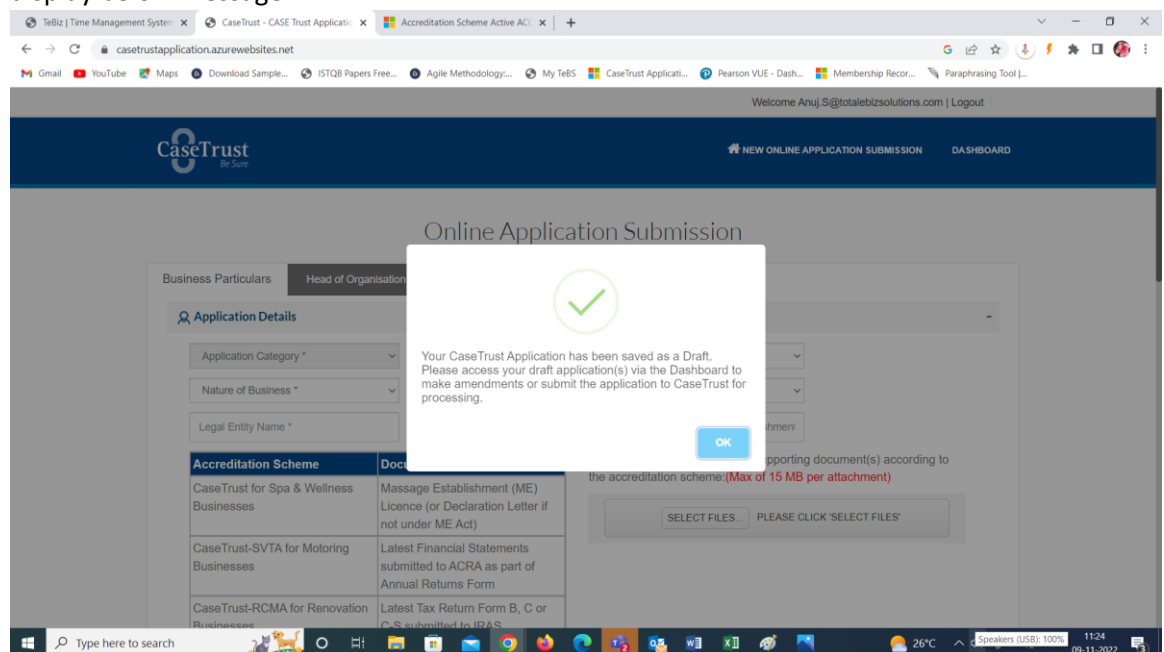
- Outlet** (tab header)
- Detailed List of outlets\*(Max of 15 MB per attachment)** (text input)
- SELECT FILES** (button)
- PLEASE CLICK 'SELECT FILES'** (text input)
- [Click here to download template for outlet file upload.](#) (link)

At the bottom of the form, there are 'Previous' and 'Next' buttons.

- Again click on next and system will direct user to next tab which is “Terms and Conditions” tab. User will click on check box to agree with terms and conditions of CaseTrust.

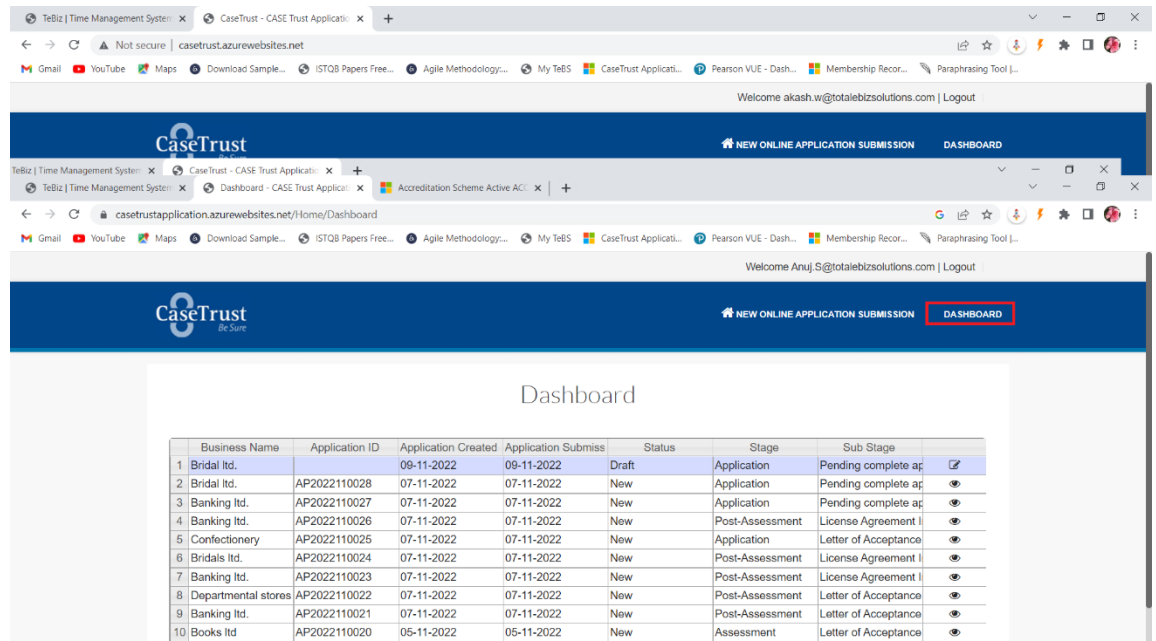


- Click on Draft and the application record will be saved in draft and system will display below message:



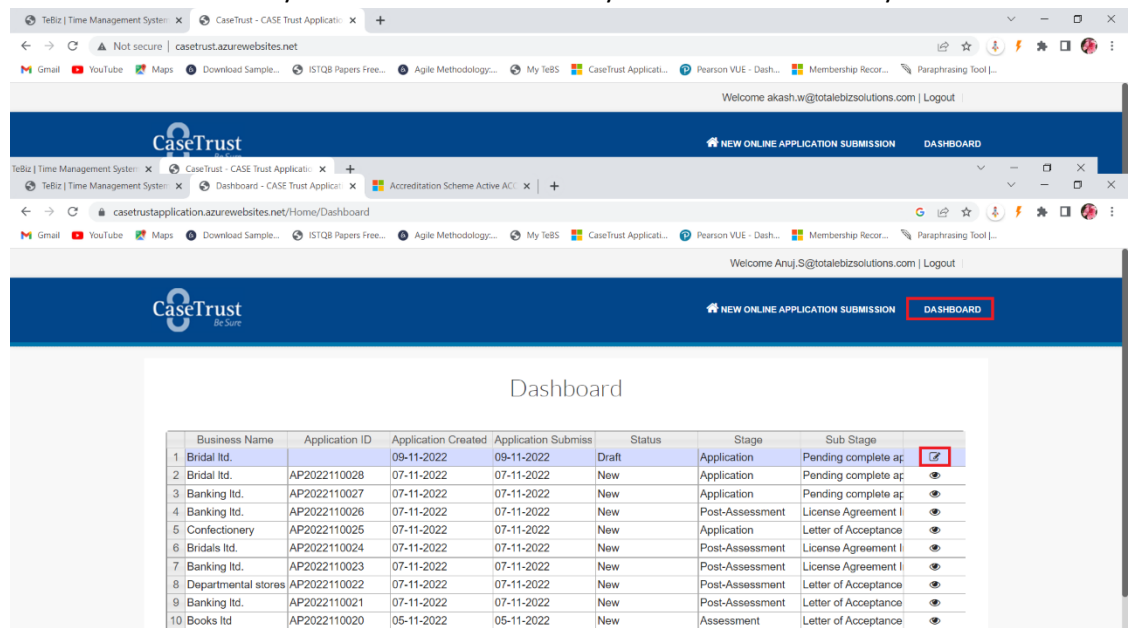
- Now click on Dashboard and system will direct user to dashboard page where user can find all the records submitted as well as saved as draft.





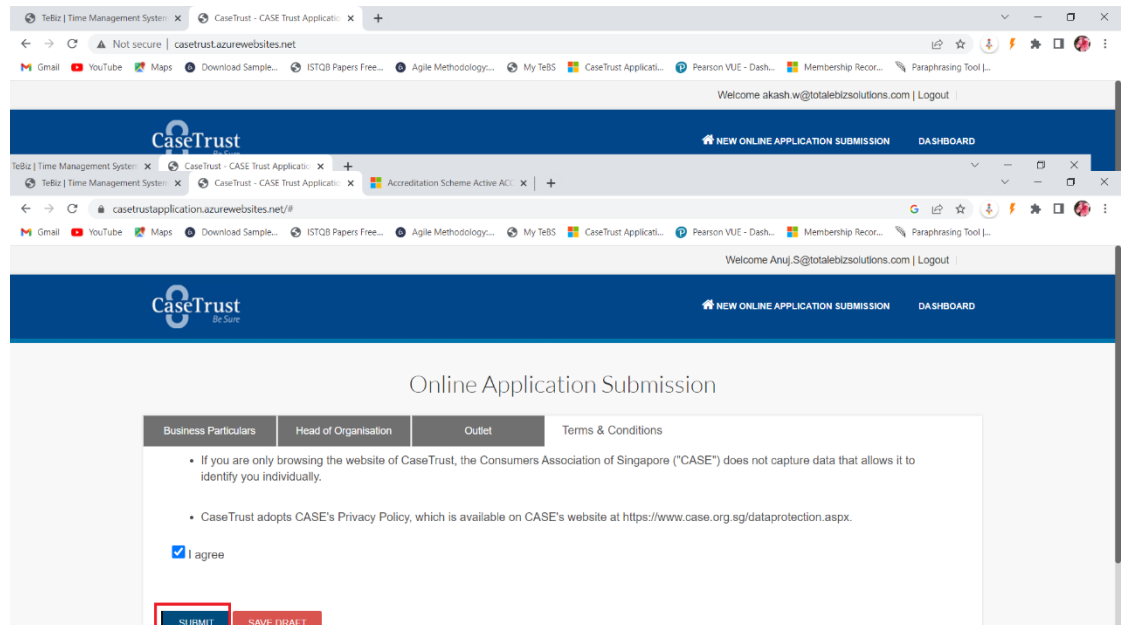
	Business Name	Application ID	Application Created	Application Submiss	Status	Stage	Sub Stage	
1	Bridal Ltd.		09-11-2022	09-11-2022	Draft	Application	Pending complete ap	
2	Bridal Ltd.	AP2022110028	07-11-2022	07-11-2022	New	Application	Pending complete ap	
3	Banking Ltd.	AP2022110027	07-11-2022	07-11-2022	New	Application	Pending complete ap	
4	Banking Ltd.	AP2022110026	07-11-2022	07-11-2022	New	Post-Assessment	License Agreement I	
5	Confectionery	AP2022110025	07-11-2022	07-11-2022	New	Application	Letter of Acceptance	
6	Bridals Ltd.	AP2022110024	07-11-2022	07-11-2022	New	Post-Assessment	License Agreement I	
7	Banking Ltd.	AP2022110023	07-11-2022	07-11-2022	New	Post-Assessment	License Agreement I	
8	Departmental stores	AP2022110022	07-11-2022	07-11-2022	New	Post-Assessment	Letter of Acceptance	
9	Banking Ltd.	AP2022110021	07-11-2022	07-11-2022	New	Post-Assessment	Letter of Acceptance	
10	Books Ltd	AP2022110020	05-11-2022	05-11-2022	New	Assessment	Letter of Acceptance	

- The one which are saved in draft are editable and depicted with pencil icon where as those which are already submitted are in read only mode and shown as eye icon.



	Business Name	Application ID	Application Created	Application Submiss	Status	Stage	Sub Stage	
1	Bridal Ltd.		09-11-2022	09-11-2022	Draft	Application	Pending complete ap	
2	Bridal Ltd.	AP2022110028	07-11-2022	07-11-2022	New	Application	Pending complete ap	
3	Banking Ltd.	AP2022110027	07-11-2022	07-11-2022	New	Application	Pending complete ap	
4	Banking Ltd.	AP2022110026	07-11-2022	07-11-2022	New	Post-Assessment	License Agreement I	
5	Confectionery	AP2022110025	07-11-2022	07-11-2022	New	Application	Letter of Acceptance	
6	Bridals Ltd.	AP2022110024	07-11-2022	07-11-2022	New	Post-Assessment	License Agreement I	
7	Banking Ltd.	AP2022110023	07-11-2022	07-11-2022	New	Post-Assessment	License Agreement I	
8	Departmental stores	AP2022110022	07-11-2022	07-11-2022	New	Post-Assessment	Letter of Acceptance	
9	Banking Ltd.	AP2022110021	07-11-2022	07-11-2022	New	Post-Assessment	Letter of Acceptance	
10	Books Ltd	AP2022110020	05-11-2022	05-11-2022	New	Assessment	Letter of Acceptance	

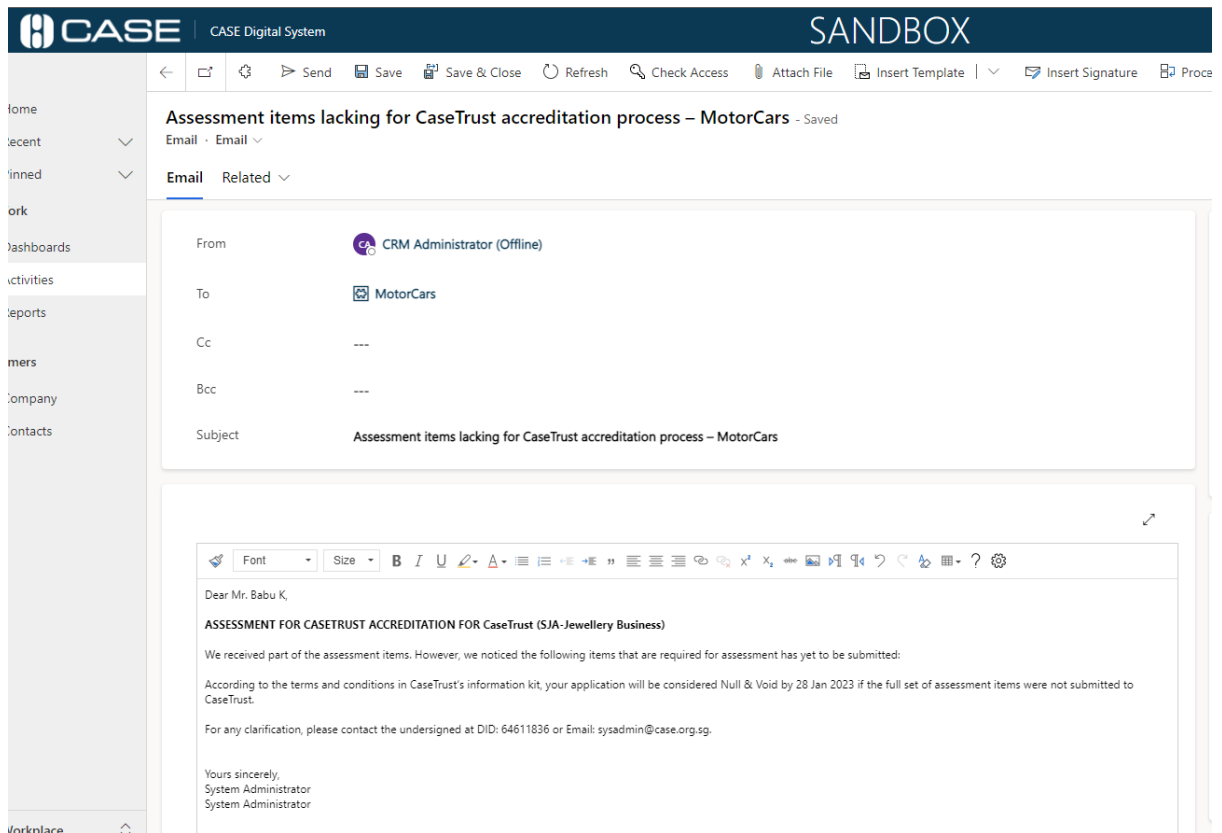
- By clicking on pencil icon system will redirect user to the application page and the user can submit the record from there.
- Click on Submit from the Online Application Submission Page



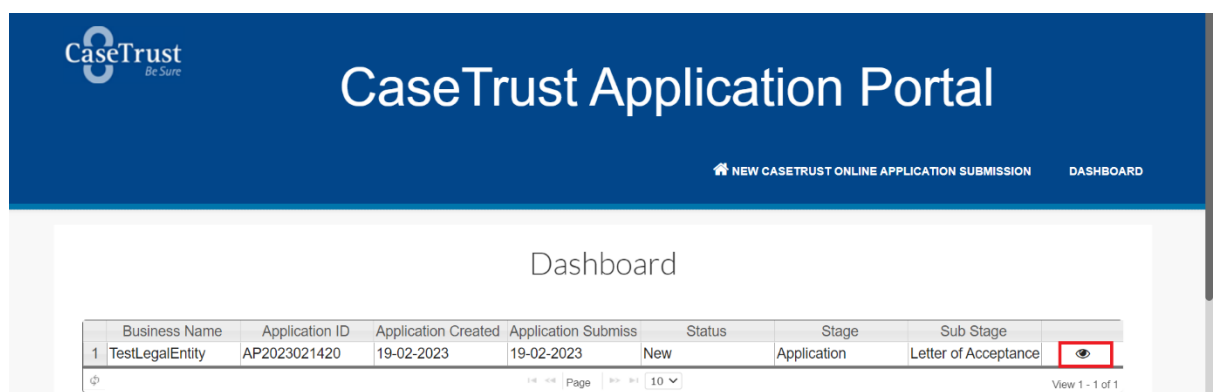
System will display below message and the application report will be submitted and display in CRM Application Module.

## 4 Submission of Assessment Documents from Business Application Portal

- After successful submission of CaseTrust application, CaseTrust will vet the application and contact the business if required.
- Once all the necessary details received by CaseTrust from Business then CaseTrust HOD approves the Letter of Acceptance (LOA).
- After this the application is moved to Assessment Stage. Once the application is moved to Assessment stage then one email is being triggered from CRM to informing business that, they need to upload new set of documents through Business Application portal. These documents are required for Assessment.



- After receiving the above email business needs to log in to application portal again and open the Dashboard page.
- From Dashboard business user needs to identify the respective application (for which LOA is approved and business received the email regarding document upload for Assessment).
- User needs to click on the respective records 'Eye' icon.



- The record will be opened and after opening and business will be able to see the 'Assessment Documents' tab, within the application record.



## CaseTrust Application Portal

[NEW CASETRUST ONLINE APPLICATION SUBMISSION](#)
[DASHBOARD](#)

### Online Application Submission

Application Id - AP2023021420

Assessment Id - PE2023020285

Business Particulars

Contact Particulars

Outlet

Terms & Conditions

Assessment Documents

- Upon clicking on the 'Assessment Document' tab user will be able to see a page to upload multiple documents together. At one shot user can upload 10 different documents. All the file types will be accepted by system to upload including zip file.
- When user wants to upload multiple documents needs to click on the 'Documents' button.
- The 'X' button indicates the deletion of the attached file (before upload).
- Upon clicking on 'Upload' button the file will be uploaded to portal and will be saved in CRM.

### Online Application Submission

Application Id - AP2023021420

Assessment Id - PE2023020285

Business Particulars

Contact Particulars

Outlet

Terms & Conditions

Assessment Documents

 Uploaded Documents

 Assessment Documents



Documents

Assessment Document(Max of 15 MB per attachment)

Choose File

No file chosen

Remarks:

Document Description

Choose File

No file chosen

Remarks:

Document Description



UPLOAD

Previous

Next

- Once the upload is successful user will be able to see the below success message.

