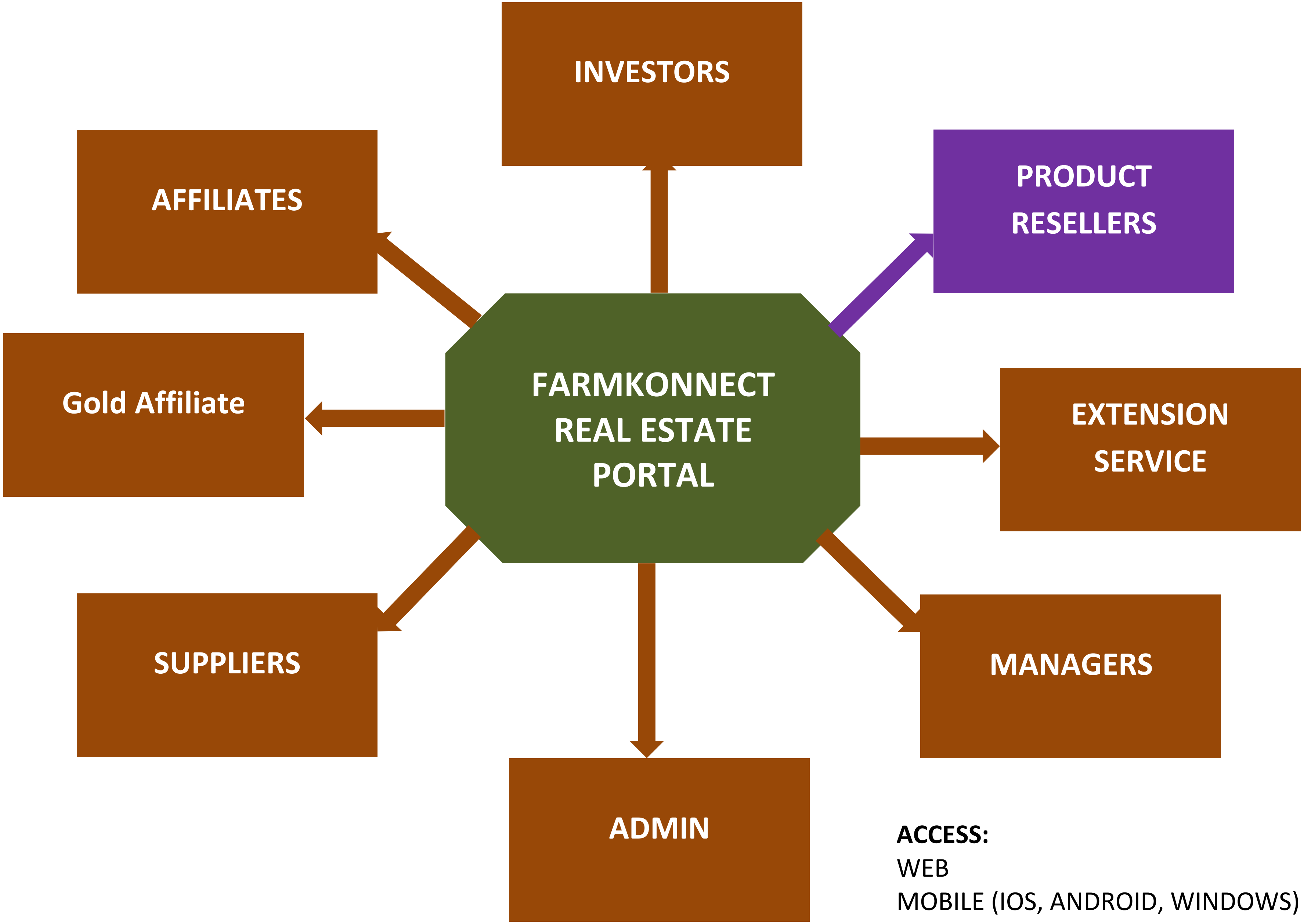
AGRICULTURAL REAL ESTATE PORTAL- ADMIN END

GUIDE TO THE DEVELOPMENT OF THE REAL ESTATE MANAGEMENT PORTAL

OCTOBER 2019



ACCESS:
WEB
MOBILE (IOS, ANDROID, WINDOWS)

Please give option for pop up notifications in app. All notifications must be by: email, dashboard/in-app notification with pop up notification.
There should be a setting place where agreement, messages, notifications, commissions, rewards and bonuses can be set.
All records must be back-dateable.

THE ADMIN PORTAL

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ADMINISTRATIVE END			
Description	**Features**	**More Details**	**Remarks**
This is the interphase from where the company manages and runs the investment portals. **ROLES** The roles in this end shall include *but not limited to*: a. Super Admin. b. Investment Manager. c. Marketing Head. d. Account Officer. e. Affiliate Managers. f. Affiliates. g. Basal Coordinators. h. Accountant. i. Cash Officer. j. Feedback Officer. k. Leads officer. l. Records. Records.	**Dashboard** – The landing page for each of these persons through which they can manage the clients.		All account must be able to recover their passwords through email systems, the only acceptable email, usually, consider @farmkonnectng.com emails as the most desirable. NB: All logins, activities by any admin, and super-admin roles must be logged under records and should not have the ability to delete, reset or erase. The log should be able to group records into folders of days, weeks, months and years for easy management. Records will be automatically created.

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Super Admin:	The SA has the special ability to set up roles, approve certain activities. It is the core of the system.		
Navigation Tools. • My Dashboard	The SA dashboard shall display the following information: • Number of account Users. • Roles and number of users of that roles. • Investments categories. • Investment packages. • Deleted Roles. • Managers. • Pending approvals.		The SA should be able to have an overview of all account users, All investments Overall amount invested. Overall wallet balance and other key account activities. Pending approvals shows the list of approvals that is pending that the Super Admin is expected to authorise in order for the work flow to continue.
• Pending Approvals.	Any process that requires the SA's approval will all be listed under this list with sufficient details. Some of such activities that may		The super admin must be an approving account for some activities.

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	require approval include but not limited to: Withdrawal Requests Commission processing Creating of investment category. Creation of Investment Packages. Editing Investment packages. Deleting or archiving accounts. Transfer of account ownership. Stopping/Hiding an investment package. Other roles that may be added from time to time.		
• Create investment Categories.	Only the SA can create Investment Categories. The Marketing head can only create investment packages and there must be approvals for all packages		Please note that investment categories are different from packages.

	before they are available to the investors. The SA is the approving authority.		
• Create a new role.	The Super admin should be able to create new roles This allows the SA to create a newly named role and assign functions to the role persons.	This implies that all functionalities that every account role holds must be able to come out as a list and the SA will select the abilities of the new roles. That means the SA can actually decide what functions a role may be able to do or not do.	
• Edit Roles.	The SA may also want to reduce or increase the functionalities of a role. He can therefore edit roles, by removing or adding some functions to the role.		

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• Archive Role.	Dysfunctional roles can be archived; we do not want anything to be deleted. They can only be archived, and the records must log centrally every activity across all account users for forensic purpose in the future.		
• View Account Users	This enables the SA to view the list of every account user, the date the account was created and the SA that actually created the account.		There will also be logged record of the account creation, date and the creator of the account.
• Assign Managers.	The Super admin should have the ability to assign managers to all (role)		

	account user. This will be the person to whom they report and the person will also be able to view their performance and activities as well as set targets for them.		
• Allocate Cash to Accountant.	All accountants will spend from a single wallet, to which the SA can add cash. Only the SA can create cash from nothing and put it in the accountants' wallet. The SA can only credit the accountant wallet; he cannot credit any other account.	The SA can allocate cash and the log of such allocation will also be made. Remember that all activity, no matter how minute, must be logged.	
• View Activity Logs.	The SA has the ability to view the details of all activities of admin account users.	The details to display will be a log of activities of the admin account users such as serial number, names of	There should also be the ability of the SA to inspect individual activity log, Such that instead of seeing the overall list, the SA can search for

		user, role, location, Exact time of login, type of platform used, and activities done.	individual and see only the log of the individual. That is the SA must be able to filter all activities using: Roles User Date Activity Type.
Approvals. Some certain activities may require final approvals.	Categories of final approvals include. 1. Enablement of wallet to wallet transfer. 2. Account verification final approval. 3. Withdrawal Request final approval. 4. Transfer of ownership final approval. 5. Military status confirmation. 6. Final approval for becoming affiliate.		

Lead Officer	This is the role for those that utilise diverse means to generate leads for the marketing department.		
	• Add new lead.	The lead officer will be able to add new leads to the pool, key field are: **Name, Phone, Email, Location and source of lead (Twitter, Linked in, FB, Referrals, Uber, Taxify, direct marketing, others (specify), classification of leads, interest level.** The lead officer should also be able to add new source if source is not listed.	This can also serve as the link for the basic affiliate, in that the leads they generate can simply be loaded on the list of leads. There should also be option that enables the Lead Officer to classify the lead: **Raw Lead, Lead, Prospect.** **Interest Level:** The lead Officer should also be able to able to rate the interest level of the lead by Five stars. **One Star** – I did not have much time with lead, or not shown much interest. **Two Starts** – Lead shows appreciable interest, but I am not certain if he will convert.

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			Three Stars.- I have great hopes that this lead may do business. **Four Stars -** This lead has a very high tendency of becoming a prospect soon. **Five Stars -** This Lead is hot, he is almost a prospect. Marketing action may affect the classification and interest level.
	• View Leads.	The **View Lead** option allows the user to see the list of all leads he has generated.	The list should show in a table, with the button to enable editing, archiving or updating the leads. The table should also indicate the stages of the leads based on classification or marketing action. Classification of leads:

	• Edit lead.	This tool enables the Lead	**Raw Lead** – those not really aware of the company or business at all. **Leads.** Those who are aware of the company and wish to know more. **Prospects** – Those that have knowledge of the company and its products and have shown interest in doing business. **Clients** – these are people that are already converted into investors. NB: ***Marketing Action*** *is when the status of the lead changes due to their activities or definite action of a marketer (A marketer changes the status manually when he/she have engaged the lead) or when a lead makes an investment, the system automatically changes it to a client. When he opens an account he automatically becomes a prospect.*

<table>
<tr><td></td><td></td><td>Officer to be able to edit information and classification of the lead.</td><td></td></tr>
<tr><td></td><td>• Archive Lead.</td><td>When a lead becomes difficult or redundant, the lead officer may simply archive the lead.</td><td>Archived leads will show under the heading, archived leads in the lead table. This action can also be done from the lead list.</td></tr>
<tr><td colspan="4">All the leads generated by the lead officer will be listed in the Lead Pool. The Lead officer does not have access to the lead pool, he can only see the list of his own leads. However marketers will have access to the lead pool. The lead pool is the list of all leads that have not been converted to a client or prospect. Once marked a client or prospect, they move to clients list and prospect list as appropriate and are moved from the Lead Pool.

Marketers are to be notified of new leads through a pop up notification on their mobile apps.

Please also note that the lead officer can see the list of all his own leads, and their status, regardless of the classification. Unlike the leads pool where clients are prospects are removed from the list.</td></tr>
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- Client Management
- View Client list.

- Options of categories of investments.
- View Leads.
- View Prospects.
- Assign Account Officer.
- View complaints and feedbacks.
- View Requests.
- Set Targets
  - Probation Targets
  - Marketers Target.
- View Marketers.
- Manage Marketers
- Manage Account officer
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