Functional Requirements

Main Function :

1. Login

   1.1. The system will request the login ID and password

   1.2. The system will verify whether the login id is exist

   1.3. The system will verify whether the password is match with the database

   1.4. The system will differentiate the role and redirect to the role accessible page.

2. Post Engagement

2.1. The system allows the Property Agent(PA), Banker, Finance Consultant (FC) to review and rating on

2.2. the loan processing experience

2.3. The system allows the superAdmin to search and view all the submission's post engagement

Property Agent (PA)

3. Case submission

3.1. The system allows the PA to submit the case

3.2. The system request to select "Employee" Or "Self-Employed"

3.3. The system will check if the PA select "Employee" OR

“Self-employed” then pop-up the required information checklist

3.4. If the PA select “Employee”, then the system will request for the required document accordingly. *Reference MAD072720210001

3.5. If the PA select “Self-Employed”, then the system will request the required document accordingly. *Reference MAD072720210001

3.6. The system allows the PA to select the project’s type (Project, Subsales or refinance)

3.7. The system will check the selection of the PA

3.8. If the project’s type is “Project”, then the system will request the required document accordingly. *Reference MAD072720210001

3.9. If the project’s type is “SubSales”, then the system will request the required document accordingly. *Reference MAD072720210001

3.10. The system should show the percentage of document uploaded in checklist

3.11. The system will verify the submission’s type “Project”, “Subsales” or “Refinance”.

3.12. The PA/superAdmin will manual assign the submission to finance consultant to handle the case.

3.13. The system will record the date and time when user submit the case.

3.14. The system will also record the date and time when assigned to the FC and Banker.

**There is additional employment type added for case submission reference refer to MAD072720210001.

Finance Consultant (FC)

4. Case submission

4.1. The system allows the FC to search, submit & view the case

4.2. The system will notify the FC the case due before 1 day

4.3. The system allows the FC to submit the case for “refinance”, the required information according to the reference MAD072720210001.

4.4. The system will request the user to enter the DSR % manually. After that, the system will pop out the eligible banks (Bank category created by superAdmin) to the case for FC to select. *Can be multiple selection

4.5. After the FC selected the bank, the system will show a list of available banker for FC to select.

4.6. The system will send notification to FC if the FC didn’t submit the case within 3 days and superAdmin. They have to provide reason (Create a reason field). The superAdmin will receive the reason.

4.7. The system will send notification to the selected Banker.

4.8. The system allows the FC to enter the insurance amount and insurance type.

4.9. The system allows the FC to select the status of case (Stuck, DSR Burst, Reject) and enter remark field.

4.10. The system will request the FC for final update (after case approve by banker)

4.11. The system will request the FC key in “Letter Offer Signing date”, “MLTA amount”.

4.12. The system will finalize the commission and send the submission details to superAdmin.

Banker

5. Case submission

5.1. The banker will receive the case assigned to him/her.

5.2. The system allows the banker to select the status of case (Missing document / KIV / Approved / Reject / Submitted) and remark field for banker.

5.3. If approved, then the system should allows the banker to select the lawyer (Low wong & Zahrita OR others need to provide reason)

6. Rewards

6.1. The system allows finance consultant OR property agent to claim the rewards.

6.2. The reward point will accumulate / calculate by according to the successful case of insurance commission.

6.3. The system allows the superAdmin to add, edit, search and delete the reward.

6.4. The system allows finance consultant & property agent to comment to the reward.

6.5. The system will calculate the balance after the user claimed the reward.

6.6. The system allows superAdmin, finance consultant and property agent to view the comment of the reward

7. Report

7.1. Total sales report can be categorized by “Subsales”, “Project”, “Refinancing” and filter by “year”, “month”, “day”, “quarter” and “week”.

7.2. Total commission report can be categorized and filter as mentioned in 7.1

7.3. Total cases succeed / failure can be categorized and filter as mentioned in 7.1

7.4. Total number of case (Lawyer) -- (only for superadmin)

superAdmin

8. Management

8.1. The system allows the superAdmin to manage all the role in system.

8.2. The system allows the superAdmin to view total sales of company by category and date and the report mentioned in 7.

8.3. The system allows the superAdmin CRUD all the submission.

8.4. The system allows the superAdmin add bank category and details.

8.5. The system allows the superAdmin register new property agent, finance consultant and banker account.

Remark :

All role can search and view their own cases.