ADONAI ESTATE LIMITED

CLIENT SERVICE SYSTEM

Every staff who will have access to the system must have a unique log in ID and Password for easy tracking of transactions on the software.

Ability to extract data in the following manner:

- Periodic Basis (e.g., monthly, quarterly or any defined period by the user)
- Branch Basis (Head Office, Sogakope, Royco House, Hohoe, Market Branch)
- Site Basis (Airport Golf City Site 1, Airport Golf City Site 2, Shai Hills, UHAS-Ho, UHAS-Hohoe, Grace City, Zoe City, etc.)
- Duration subscription basis (i.e., Cash clients, One-year payment plan clients, etc.)
- Clients who have completed payment using the above criteria
- Clients whose plots have been demarcated using the above criteria
- Clients whose documents have been prepared and are awaiting pick up using the above criteria
- Clients whose documents have been prepared and have picked them up using the above criteria
- Clients who have requested for refund using the above criteria

- Referred clients (by staff) to help compute Commissions

Details of a new Customer to be captured into the system:

✚ BIO DATA – CLIENT SERVICE DEPT.

- Full Name of the Client (as to appear on the Indenture)
- Age
- Telephone Number(s)
- Email Address & Postal Address

✚ NEXT OF KIN DATA – CLIENT SERVICE DEPT.

- Details of Next of Kin (Name, Contact Number & Address)

✚ PLOT DATA – CLIENT SERVICE DEPT.

- Number of Plots purchased
- Site Purchased (e.g., Grace City, Golf City, etc.) – drop down for selection of the site, not to be manually typed
- Location of Plot (e.g., Sogakope, Kpenoe, etc.)
- Number of Plots
- Plot Number (uniquely generated by the system – system will be programmed)

- Type of Enrolment (VIP/Cash Client / Instalment Client)

- Type of Client (Walk in Client or Referral – Space for typing the name of the referrer)
- Documentation Type (Company preparation/Self preparation)

The system should be programmed in such a way that the Bio data, Next of Kin data and Details of Plot purchased will reflect on the Accounts Dept. portal but they cannot edit the information.

The system will then generate a unique plot number which can be plotted on the hard copy in the office. If no such information is inputted at the Client Service dept., the system will not allow finance to enter any details

Once a client is entered into the system, the system should not allow any room for deletion of the client from the system.

Ability for a client to apply online (the system will be linked to the website) This application should be directed to the Client Service dept.

FINANCIALS – ACCOUNTS DEPT.

- Initial amount paid (Amount Paid, Payment Date, Mode of Payment {Cash, Mobile Money, Bank - GCB, Access, Zenith, ADB} Receipt Issued Unique Number, Name of Receipt Issuer-name of staff who issued the receipt, etc.)
- Discount options (The system will be designed in a way to automatically issue discount based on the inputted discount criteria. E.g., 10plots purchase warrants 10% discount)

- Subsequent Payments – for installment packages, the system should be programmed to indicate the total number of months the client is required to make payment and allow for each installment payment to be updated (Amount Paid, Payment Date, Mode of Payment {Cash, Mobile Money, Bank - GCB, Access, Zenith, ADB} Receipt Issued Unique Number, Name of Receipt Issuer-name of staff who issued the receipt, etc.)

- Payment for Pillaring details {Cash, Mobile Money, Bank - GCB, Access, Zenith, ADB} Receipt Issued Unique Number, Name of Receipt Issuer-name of staff who issued the receipt, Type pf Pillar –short/Tall, etc.)

- Payment for Signing fee {Cash, Mobile Money, Bank - GCB, Access, Zenith, ADB} Receipt Issued Unique Number, Name of Receipt Issuer-name of staff who issued the receipt, etc.)

- Payment for Clearing of Plot & Internal Roads {Cash, Mobile Money, Bank - GCB, Access, Zenith, ADB} Receipt Issued Unique Number, Name of Receipt Issuer-name of staff who issued the receipt, etc.)

- Release of funds for document preparation for clients who have completed payment and have opted for the company to prepare it for them (Record the date of release of the funds via drop down calendar)
- Provision for online payment and receipt printing

➕ **SITE WORKS - SITE SUPERVISOR** (The site supervisor's portal can only reflect clients who have been cleared by the accounts department as having completed payment). At this stage, the Site Supervisor can see all the details entered by the Client Service Dept. & the Accounts Dept. but cannot edit them

- Demarcation – Date of Demarcation
- Pillaring – Date of Pillaring
- Clearing of Site (if client has already paid for clearing of plot & internal roads)

There should be aging analysis from when the client makes the first payment.

➕ **REFUND – PROCUREMENT DEPT. –** This department will have access to the Client Service dept. details but cannot edit.

- Enter date of request of refund – the system should have a drop down calendar
- Enter the refund receipt date - the system should have a drop down calendar

- The Refund details must appear at the Accounts dept. portal – they cannot edit it. It is supposed to help them process it for payment.

There should be aging analysis from the date after the refund is supposed to be made to the client should there be any delay.

➕ **PAYROLL OFFICER** – This department computes commission for clients for referring potential clients who have successfully become clients.

- Ability to pull monthly payment for clients to help compute monthly commissions
- Ability to get access to information about clients who have requested for refund so that he will stop calculating their commission

➕ **SURVEY DEPARTMENT** – This department prepares land documents for clients who have opted for the company to prepare their documents for them and have completed payment.

- His portal should reflect clients who have completed payment – those who opted for the company to prepare their documents
- The date of completion of payment should reflect.
- Date of release of money for the document to be prepared must be indicated by the Accounts department and indicated by the survey department as date of receipt via drop down calendar).

There should be aging analysis from a day after the information reflect on this portal as the clien having completed payment.

- **SYSTEM ADMINISTRATORS**
  - CEO
  - Administrator
  - Monitoring and Evaluation officer

A server will be needed for back up of data.

Ability of the Client to access basic information such as bio data and payment patterns and dates of payment, amounts paid and ability to print receipts.