Functional requirement and system use

The web site should have 5 different user interface depending on their job title. This are:

1. Branch manager
2. Property valuation manager
3. Valuer
4. CSR
5. Credit Department

1. Branch manager

The branch manager should be able to send estimation request for engineering department and loan request for credit department. The branch manager should compile all the necessary files to send the request and for the departments to proceed with the request. The manager should have user domain given by property valuation manager.

The branch manager has to fill series of questionnaire boxes and attach files to send the request.

This questionnaire boxes should include:

- Applicant name
- Mortgager name
- Place of estimation (City and sub city)

Drop down menu should include:

- Under customer type (SLA, Business, Zemen staff)
- Under type of property (Residential building, condominium, apartment, commercial building, industrial building, farm, Vehicle or Machinery)
- Under purpose of valuation (collateral, project financing, mortgage & foreclosure)

Files to be attached for the request will depend on the type of customer and type of property chosen in the drop down menu above: Each of the files need to be attached separately in each box. Therefore, depending on the above condition different file attaching template should appear as following:

A) If the customer is SLA and type of property is residential building, condominium or apartment files need to be attached are:

1. Employment letter from the company
2. Acknowledgment letter
3. Estimation fee
4. LHC
5. Sales agreement (optional)
6. Other (with remark)

B) If the customer is SLA and type of property is vehicle, files need to be attached are:

1. Employment letter
2. Acknowledgment letter
3. Estimation fee
4. Title deed (libre), Declaration, proforma
5. Sales agreement (optional)
6. Other (with remark)

C) If the customer is Business (collateral) and type of property is Residential building, condominium, apartment, commercial building, industrial building, farm; files need to be attached are:

1. Acknowledgment letter
2. Estimation fee
3. LHC
4. Other (with remark)

D) If the customer is Business (collateral) and type of property is vehicle, files need to be attached are:

1. Acknowledgment letter
2. Estimation fee
3. Title deed (libre), Declaration, proforma
4. Other (with remark)

E) If the customer is Business (collateral) and type of property is machineries, files need to be attached are:

1. Acknowledgment letter
2. Estimation fee
3. Declaration
4. Invoice
5. Other (with remark)

F) If the customer is Zemen staff and type of property is residential building, condominium or apartment files need to be attached are:

1. Staff ID
2. Acknowledgment letter
3. LHC
4. Sales agreement (optional)
5. Other (with remark)

G) If the customer is Zemen staff and type of property is vehicle, files need to be attached are:

1. Staff ID
2. Acknowledgment letter
3. Title deed (libre), Declaration, proforma
4. Sales agreement (optional)
5. Other (with remark)

Remark: * If the files are not attached (except the optional), the branch manager should not be able to send the request to engineering department / property valuation manager.

* If the branch manager sends hard copy (like blue print, BOQ etc.), he should be able to send a remark at the bottom. The remark should contain the delivery time, and the documents submitted. The engineering CSR need to confirm the submitted documents to the property valuation manager.

2. Property valuation manager

- The property valuation manager should get notification for all the request send to the department.
- He should be able to reject and decline their request with a remark.
- If he accepts the request he should proceed by assigning valuer and schedule the inspection at a specific time and date. The program should automatically notify the schedule to the assigned valuer and the branch manager.
- The manager should be able to generate a report by filtering through the estimation requests. The filtering criteria type of customers, purpose of valuation, type of property or name of valuer.
- The manager should be able to assign a dedication in the time of his absence on his behalf.
- The manager should be able to give access (add to the system) for new branches, new valuers and the assigned credit officers.

3. Valuer

- When a case is assigned to the valuer, he/she should get a notification. And all the data inserted by the branch manager should be accessible.
- After the site visit the valuer should change the status of the case into inspected or not inspected. If the schedule was canceled, the valuer should state the reason. The status of the case should be accessible to all the stakeholders of the case.

4. CSR (Engineering)

- The CSR should get notification for all the request send to the department.
- She should be able to confirm the submission of hardcopy files that are sent by the branch. This update should be seen by the property valuation manager before he assigns a valuer to the case.
- After a final engineering report is completed the CSR should change the status of the case into "completed". And she should add the estimated amount in the status detail.
- Also she should be able to scan and upload the final report.

5. Credit department

- Should be able accept the branch request. Engineering department should see it.

- Should be able to see the status of the estimation request.