**Pending Issues.**

* Issue with editing and disabling a proposal it’s not there. This facilitates flexibility in correcting human errors and cleaning policies that would have expired.

**Not Possible in CIGIS Application. If any error corrections required we can do it on Database side.**

* Issue with editing and disabling a declaration it’s not there.

**Not Possible in CIGIS Application. If any error corrections required we can do it on Database side.**

* Also, of not the issue of Guarantee Type and How the Guarantee number must be produced from the system must be resolved. This has impact on the Guarantee Premium Advice.

**It is billable and provided efforts in efforts doc.**

* There is need for the system to send notifications to our lending Institutions once a Guarantee expiry date have reached that is to notify our clients of the renewal.

**It is billable and provided efforts in efforts doc.**

Approval.

1. On step 1 of the proposal screen can we have the following documents as Mandatory

a.       Credit Appraisal Note.

b.       Bank Application form.

             On the same screen we need to have others for us to upload Other Documents.

**We can do validation on Check boxes in STEP 1. But if any user check checkbox and did not upload document then system did not return any error and Document do not available in Alfresco to show it in Approval screen.**

1. On Approvals
2. We want the personnel who approves to be able to see and view the following uploaded documents

i)         Credit Appraisal Note.

ii)   Bank Application form.

iii) Audited financial statements for companies that have been operating for more than 2 years (if available)

iv) Projected cash flows for the duration of the loan

**We will provide list of available documents for respective Proposal No to Approver.**

b.       We must have a dashboard which have badges with number of either Pending approval, Recommended and Approval. On Approval the group shows all approved Guarantees by the persons account the same applies to pending show pending Guarantees to his account. This will make it easier to know which Guarantee needs approval.

**It is billable and provided efforts in efforts doc.**

c.       Approval limits, approval limits for now we have placed temporary values.

1. If the guarantee Value is less than $30 000. Then Approvals required will be of Mr Mafukidze who will recommend to Ms Chirume who will approve. After the approval of Ms Chirume, the following documents must now be possible to be produced from the system, Offer Letter, Guarantee Premium advice, Committee Memo and Final Guarantee.
2. If the guarantee value is above $30 000 but less than $100 000 this needs three Approvals of Mr Mafukidze, Mr Musiwacho and Ms Chirume. Once all the three approves then the following documents can be produced from the system Offer Letter, Guarantee Premium advice, Committee Memo and Guarantee.
3. If the guarantee value is above $100 000 this needs approval of all 5. That is Mr Mafukidze, Mr Musiwacho, Ms Chirume, Mr Nyarota, Mrs Svova and Mrs Mushosho. Once all five have approved the following documents can now be produced from the system Offer Letter, Guarantee Premium advice, Committee Memo and Guarantee.

**It is billable and provided efforts in efforts doc.**

Also add a facility to notify each account user of pending Proposal on their accounts. This will expedite approvals to be made on the system.

**Please send me complete details of Add Facility to Account User.**

Once a declaration is submitted to accounts, the system accounts invoicing it’s not functioning and on Declaration if you want to view, edit a declaration there is no functionality for that.

**If any issue with Finance Module Invoices, I will check it and update you.**

**Our Clients Portal.**

The idea behind this portal is for our clients to be able to submit applications through online and for us to send them response online, however clients must have only access to this portal information only. Respective Lending institutions we have signed MOU with must be able to perform online application submission and for us to give them our response.

On the dashboard there are two aspects

1. New Application

* These will be application to be made by our clients. Our clients must be able to upload documents on the checklist, Guarantee Bank Application, Bank Appraisal and a section for Others.
* They must be a field for our clients to send comments.
* Note that we must be able to convert these online submissions to be a Proposal. Since these documents which will be submitted online constitute part of the documents to be uploaded at Step one of the proposal step.

1. Response to Applications.

* This will be our response to the client per respective Application they would have made into the system. The documents we will attach to this respect will be the Offer Letter, Guarantee Premium Advice and the Final Guarantee and a section for us to attach other documents we want to convey to our clients.
* There must be a field for us to send comments.
* Our clients must receive notification once we responded to respective applications they made.

**Client Portal is new thing and different application from CIGIS. We need to deploy that in Public IP to access Clients. We will develop with HTML, Angular, CSS, .NET and SQL SERVER DB. Please send complete detailed requirement to develop it.**