

Client Questionnaire for Loan & Membership Application Website

Dear Client,

To ensure the website aligns perfectly with your business processes, I've prepared some questions based on the initial plan. This will help me develop a solution tailored to your needs.

1. Public Website

- What specific details do you want to showcase about your company (e.g., mission, services, interest rates, FAQs, testimonials)? Are the ones we made enough?
 - Do you want potential members to **apply online** or just download membership forms?
 - If applying online:
 - What documents should applicants upload?
 - Who is responsible for reviewing and approving membership applications?
 - Should applicants receive confirmation emails after submission?
 - Do you require any **security features** (like CAPTCHA) to prevent spam applications?
-

**** If Applying Online:**

2. Member Portal (After Login)

- **Overview Dashboard:**
 - What key information should members see (e.g., account status, loan balance, recent activities)?
- **Loan Applications:**
 - You offer the following loans: (Short-term, Emergency, Long-term), is this right?
 - What documents are required for each loan type?
 - For the approval process for loans:
 - Who approves the loans?
 - Does it require single or multiple approvals?
 - Should members be able to **track the status** of their loan applications?
- **Notifications:**
 - How do you prefer to notify members? (Email, SMS, Calls)
 - Should automated reminders be sent for due payments or pending documents?
- **Profile Page:**
 - What details should members see (e.g., membership number, loan history)?
- **Document Management:**
 - Should members be able to upload additional documents after registration?
 - Do documents have an expiry date, or should members manually remove outdated ones?

3. Admin & Staff Panel

- **Roles & Permissions:**
 - What different staff roles do you have (e.g., Admin, Loan Officer, Membership Manager)?
 - What actions should each role be allowed or restricted from doing? (e.g., approve loans, view documents, manage members)
- **Approval Process:**
 - For both membership and loan applications:
 - Who can approve applications?
 - Does the approval require multiple levels (e.g., verified by Officer A, then final approval by Manager B)?
- **Document Management:**
 - Should admins be able to download, verify, and delete submitted documents?
- **Notifications Center:**
 - What kind of system alerts do you want admins to receive (e.g., pending approvals, overdue loans, flagged activities)?

4. Additional Questions

- Do you need **reports** or analytics (e.g., total loans issued, active members, default rates)?
- Any specific **design preferences** or examples of websites you like?

Once you provide your responses, I'll have a clearer picture to move forward. Feel free to add any details I might have missed.

Best regards,
Mhlengi Lukhele,
Luminous Digital