

WECOZA 3.0						
Persons	Clients	Classes	Products	Agent Portal	Project Management	Reporting
Learners	CRM	Employed	Create custom courses	Capture Att & prog	Training schedule	
History must belong to the learner	All client details (company)	Multiple subjects/ courses	Change courses	Payment submission automated acc to capturing	Client List	
Compulsory fields : Race, gender, ID	Client history	Site/groups	SetUp Reporting/ Progression	Communication	Monthly Reports	
Assessment results report	Client comms (Google Integration)	Class Time (belongs to class not agent)	Set Learner Flagging (hours/ progression)	Annual Agent Agreement	Dashboard	
Exam Results	Quotes	Multiple Agents	Course notes & rules	Not captured report	Deliveries / Collections	
Movable between classes/clients	Reminders/Follow Ups	Move Learners	Assessments	Agent Notifications	Progressions	
Multiple level/ learning areas	Leads/Cold Calls	Class notes/ special needs	Examinations	Agent Paperwork	Invoicing Hours	
SOR's/POE's	Auto recycle if no contact	Special projects : Agriseta, Foodbev, Exams	Link Material?	Location Verification	QA'S & Motivations	
	Stats/Reporting	Learner in class status		Time Verification	Agent Recruitments	
Agents	When last visited face to face meetings	Class History		Log Portfolio Collection	Admin Automation	
All compulsory details	Client special notes/ Instructions	QA Reports		Learner status update	Internal comms automation	
Agentpack + signed Agreement	How to fight duplicates (Flag similar?)				Remove repition of Data Capture	
Evaluation + Assessment Results	Forced Courtesy Calls	Community				
History : orders, notes	Integration with Teleforge	Learnerpacks (Automation)				
Flagging	Mautic Integration	Multiple subjects/ courses				
Comms : google chat integration?		Site/groups				
Hours/ Invoicing Integration(Payments)	Current Clients	Class Time (belongs to class not agent)				
Active orders	Potential Clients	Multiple Agents				
Availiibity / Demographics		Move Learners				
		Class notes/ special needs				
		Special projects : Agriseta, Foodbev, Exams				
Contact Person(Client)		Learner in class status				
Compulsory details		Class History				
Company History		QA Reports				
Moveable between Companies						
Communication history (Google Integration)		Learnerships				
		Multiple subjects/ courses				
Users		Site/groups				
Permissions/Access		Class Time (belongs to class not agent)				
Dashboard		Multiple Agents				
Roles		Move Learners				
		Class notes/ special needs				
		Special projects : Agriseta, Foodbev, Exams				
		Learner in class status				
		Class History				
		QA Reports				
		Learnerpacks (Automation)				
		Module Progression				
		Other Paperwork(Automation)				

Operations Daily to do	
Joiner (start new class) or join	
Agent Absent - inform office - inform client - Update PMS	
Create numeracy class on wecoza	
Create communication class on wecoza	
Arrangement details for portfolio collecion	
Update learner details	
Updating training schedule	
Email to ask for sales order and approve of sales order	
Checking material when being packed	
Updating progressions in Delphi	
Ask for OTP to create class on Delphi	
Informing office of need to replace agent - recruit of agent - source of new agents	
Removing or adding learners on the progression and attendance reports	
Assisting with online capturing queries	
BackUp Agent	
PMS Lines - Updating info and making lines green	
Arranging of material	
Marking of assessment and compile of assessment report	
Filling in the projects stop & start form	
Communicating with agents on a daily bases	
Doing seta extractions	
Resolving of agent queries	
Checking SOR Certificates and scanning in	
Updating PMS	
Requesting welcome certificates and client file	
Checking and rinting of Learnerpacks	
Creating classes on Delphi	Duplicate
Checking of POE when arriving in office	
Asking for sales order for Agent Material and approve of sales order	
Sending mocks with material	
Sourcing details for mock to be scanned to us	
Printing of Seta Documents	
Ensure agent replacement order is done & agent is informed	
loading of PMS	
Arraging of safety equipment like boots/ hard hat	
Informing office on email if a client has cancelled class for a day or week	
Following up when SOR is not recieved	
Updating of Assessment report when incorrect	
Enrollment forms	
Capturing, verifing and emailing of monthly report	
Bankdetails give to Rina with stipend project	
Changing class times on Delphi and training schedules	
Updating and creating of training schedules	
Ensuring learnerpacks gets delivered to site	
Updating of monthly reports when incorrect & resending	
Chaning hours when invoicing hours does not corospondes	
Uploading learners ons SETA	

Sending of SBA's	
Notification to rememer to get new SBA - expire 1 December 2024	
Arranging of motivation or awareness with the agent	
Followup for ABET Level 4 Exam results	
Emailing mock results to agent	
Emailing EXAM results to client	
Changing learner status on Delphi	
QA Reports email to reps	
QA Report Notes added n Wecoza	
Loading agents on SAGE	
Asking for sales order for agent materials	
Booking out of agent material	

WECOZA 3.0 Starting Point - "PMS"									
Events	Comments		Client/Class	Task	Date of Event	Reminder date	Action	Notifications	Comments
New Class	Create New class Load learners Agent Order Training Schedule Material Delivery Agent Paperwork		Kishugu	New Class	2024-07-15	2024-07-10	Outstanding Actions Create New class Load learners Agent Order Training Schedule Material Delivery Agent Paperwork	logistics@eee.co.za;marinda@eee.co.za	Any event must automatically be started by a rep confirming a deal. Display on Supervisor Dashboard, Actioned items must automatically be ticked if done on the system. No manual Completion of tasks/actions. Project Supervisor must have options to view another supervisor's dashboard incase of off sick/Leave. Reminder dates to be automatic according to Rules.
Restart Class	Restart stopped class Confirm Learners Agent Order Training Schedule Material Delivery Agent Paperwork		Pesico Upington	Book Supply	2024-07-01	2024-06-28	Outstanding Actions Arrange Delivery Invoice/Delivery Note Delivery Confirmation	logistics@eee.co.za;magda@eee.co.za	
Stop Class	Stop Active Class Stop Agent Order Material Collection SOR Progressions								
Assessment Sessions	Create Session/Class Agent Order Assessment Delivery Assessment Collection Assessment Report								
Awareness Session	Create Session Agent Order Commitment Letters Session Report								
New Joiner Class	Create New class Load learners Agent Order Training Schedule Material Delivery Agent Paperwork								
Restart Joiner Class	Restart stopped class Confirm Learners Agent Order Training Schedule Material Delivery Agent Paperwork								
Stop Joiner Class	Stop Active Class Stop Agent Order Material Collection SOR Progressions								
Change in Class times	Change Class Times Training Schedule Update Agent Order Agent Paperwork								
Client Cancelled	Note the Cancelation Agent Communication Training Schedule Lost Hours Monthly Attendance Register Agent Invoice								
Agent Absent	Note the Agent Absent Client Communication Training Schedule Lost Hours Monthly Attendance Register Agent Invoice								
Agent Replacement	Note the Replacement Client Communication Agent Order (Stop & New) Agent paperwork								
QA Visit	Note the visit QA Report QA Report Actions Agent Notes Next QA Visit/Training Schedule								
Deliveries	Arrange Delivery Invoice/Delivery Note Delivery Confirmation								
Collections	Arrange Colelction Waybill Collection Received								
Mocks/Progress Confirmation	Confirm Dates Script Delivery Agent Communication Agent order Final Script Script Results								
Exams	Exam Registration due date Training Schedule Registration Confirmation SBA due date if applicable Result Release dates Certificate Delivery								

SORS/Progressions	Batch POE Assess/Moderate Submit SACAI Receive SOR Client Communication Deliver SOR Deliver Material Learner Progression & New Level New Level Start Date Agent Paperwork Rep Communication								
SETA Uploads	Learnership Module complete /All modules complete Batch POE Assess/Moderate Load Achievement on SETA Prepare SETA visit SOR SOR Delivery								
Agent Training	CV + Qualifications Quantum Assessmnet Commitment letter Agent Pack Agent Material Attendance Certificate								
Agent Recrutement	New Agent Backup Agent Area Required Date Required								
Communty Project	Venue Recrutiment Assessments Learner Packs Stipends New Class Collection								
Agent Avaialibility	Active Agents Available days Demographics								
Monthly Reports	Learners behind Schedule Learners too Fast Project Excessive Hours								

Classes														+ ADD CLASS	
Status	Client/Class	Site	Start Date	End Date	Attendance	Progression	Type	Subject(s)	Learner(s)	Phase	Outstanding Actions	Completed Actions	Communication		Marketer
Active	CHEP	Cape Town			View	On Schedule	Standard	FLC Comm	Assign	Learner Recruitment	Assessments Scheduling Assign Agent Book Supply QA Visit POE / SOR Report		Message Client Message Agent	EDIT	Marco
Active	Kishugu	Johannesburg	01 Sep, 2025	31 Oct, 2025	View	Ahead	Standard	AET 2 Comm	View / Edit	Scheduling	Book Supply QA Visit POE / SOR Report	Learner Recruitment Assessments Schedule	Message Client Message Agent	EDIT	Marinda
Restarted	Pepsico	Upington	06 Aug, 2025	30 Nov, 2025	View	Behind	Package	AET 2 Comm	View / Edit	Book Supply	QA Visit POE / SOR Report	Learner Recruitment Assessments Schedule Assign Agent	Message Client Message Agent	EDIT	Magda
								AET 3 Comm	View / Edit	Book Supply					
								AET 1 Num	View / Edit	Book Supply					
Stopped	CHEP	Durban	03 Jun, 2025	01 Sep, 2025	View		Standard	AET 2 Comm	View / Edit	POE / SOR				EDIT	Marco
Stopped	Coca- Cola	Germiston	03 Jul, 2025	30 Aug, 2025	View		Standard	AET 3 Num	View / Edit	POE / SOR				EDIT	Magda

My WECOZA		TASKS						
Dashboard		Client/Class	Event Type	Event Date	Due Date	Tasks		
Classes		Kishugu	New Class	2024-07-15	2024-07-10	Create New class	<input checked="" type="checkbox"/>	Informed
						Load learners	<input checked="" type="checkbox"/>	Inform
						Agent Order	<input checked="" type="checkbox"/>	Inform
Clients						Training Schedule	<input type="checkbox"/>	Open Task
						Material Delivery	<input type="checkbox"/>	Open Task
						Agent Paperwork	<input type="checkbox"/>	Open Task
Agents		Pesico Upington	Book Supply	2024-07-16	2024-07-13	Arrange Delivery	<input checked="" type="checkbox"/>	Informed
						Invoice/Delivery Note	<input checked="" type="checkbox"/>	Inform
						Delivery Confirmation	<input type="checkbox"/>	Open Task
Assessments & Exams		Aard Mining	POE Collection	2024-07-20	2024-07-18	Arrange Colelction	<input checked="" type="checkbox"/>	Informed
						Collection Received	<input checked="" type="checkbox"/>	Informed
						Batch POE	<input checked="" type="checkbox"/>	Informed
						Assess/Moderate	<input checked="" type="checkbox"/>	Inform
						Submit SACAI	<input checked="" type="checkbox"/>	Inform
						Receive SOR	<input type="checkbox"/>	Open Task
Reports						Client Communication	<input type="checkbox"/>	Open Task
						Deliver SOR	<input type="checkbox"/>	Open Task
						New Book Supply	<input type="checkbox"/>	Open Task
						Learner Progression	<input type="checkbox"/>	Open Task
						Agent Paperwork	<input type="checkbox"/>	Open Task
		UPCOMING TASKS						
		Client/Class	Event Type	Event Date	Due Date	Tasks		
		Arcelor Mittal	Stop Class	2024-08-03	2024-07-30	Add to current task		
		Bimbo	Assessments	2024-08-05	2024-08-01	Add to current task		
Manual Events								
Agent Absent								
Client Cancelled								
Agent Replacement								
Agent Recruitment								
Change in Class Times								
Collections								
Agent Training								
Auto Events								

New Class	Rep/CRM							
Restart Class	Rep/CRM							
Stop Class	Training Schedule							
Assessment Sessions	Rep/CRM							
Awareness Session	Rep/CRM							
New Joiner Class	Rep/CRM							
Restart Joiner Class	Rep/CRM							
Stop Joiner Class	Training Schedule							
QA Visit	Training Schedule							
Deliveries	New Class Restart Class Assessments SORS/Progressions							
Collections	Training Schedule							
Mocks/Progress Confirmation	Training Schedule							
Exams	Training Schedule							
SORS/Progressions	Collections							
SETA Uploads	Training Schedule							
Communtiy Project	Rep/CRM							