






User	Roles	Sign off	
<b>Super Admin</b>	Create properties	✓	
	Create units	✓	
	Separation of units per project agent permissions per project		
	User Management View invoices	x	
<b>Agents</b>	Create Leads	x	
	Create customers	✓	
	Upload customer details ie phone no, ID, Next of Kin, Bank details	✓	
	Reserve units	✓	
	Create Prospects	x	
	Make Payments <10%	✓	
	Make Payments >10%	✓	
	Make Payments <25%	✓	
	Make Payments >25%	✓	
	Make Payments 10%	✓	
	Make Payments 25%	✓	
	Payment Highlight on sold units (under view) Trail of payments from view sold	x	
	Add Payments Legal should view customers module	x	
	OL View allow agents to edit	x	
	SA View agent cant see other customers	x	
	Access to clients to specific agents	x	
	Access to clients information	x	
Process Flow	-		
<b>Legal</b>	Upload OF couln't upload	x	
	Upload SA	✓	
	Upload RF	x	
	Confirm payments from finance	✓	
	Separation of project documentation	x	
	project documentation was able before		
	Project documents (agents contracts, approvals, etc)- as earlier system allowed	x	
	Sectional & Occupational titles titles	x	
	Visibility of sold units	✓	
	Download the uploaded documents	x	
	Documentation timelines (For SA and OL), eg 30 days/90 days flagging will be possible	x	
User identification on upload stamped user on document upload			
View customer details	x		
Separation of client documents pulling more than the specific client data	x		
<b>Finance</b>	Confirm payments	✓	
	Issues Invoices	✓	
	Issue Receipts This is automatic	x	
	Payment Summary and statements	✓	
	Export above to excel and reporting confirm	x	
	Invoice statement invoices and all payments against it	✓	
Export above to excel and reporting	x		

	Access to client statements	×	
	Unit Payments for RU	×	
	Separation of payments and revenue i.e Stima Heights and Ruaka heights (for processing fees and unit payments)	×	
General	Challenge with user log in details		
	404 Forbidden error while logging in		
	Area in sqft instead of m2 (naming) <a href="#">change m2 to sqft</a>		
	Project Name- Ruaka Heights Apartments, Stima Heights Apartments		
	Process flow		
	General dashboard reporting and viewing		
	User management		