**Issues Encountered when Capturing Customer Transactions**

1. In one case I’ve seen the 1payment refuse to launch attachment option, the section and icon for attaching is showing up but when I click it doesn’t show up the popup to select the attachment
2. I’ve noticed first payments are no longer showing up under Finance module >> Units Payments section
3. For unit B908 I paid 100k the transaction was on Offer letter section under leads, I paid another 900k which now makes it 25%, that is now supposed to move to Sale agreement but it remained at offer letter kindly fix it so that if someone pays 10% and makes another payment making it 25% then it moves.
4. On the above point 3, I realized the 900k didn’t go to finance for approval and reflected immediately, remember all payments should not hit and deduct from the invoice until confirmed by finance.
5. On the same point 3, the 100k and 900k doesn’t show on unit payments but I can see that on client statement. Just wondering if we really need this section or you can hide it so that it doesn’t compete client statements and actually I feel payment summary report shows all transaction listings, that’s my thinking if you feel we need it then fix then issues or advise otherwise.
6. On the above point 5, I made an initial payment of 55k for unit B904, the unit move from available as expected but didn’t show on agent as sold units. It also didn’t show on offer letter side of agent as well as Tracy’s side. The invoice was created but since I couldn’t see the record on offer letter, I tried to receive payment from finance unit payments, it keept rolling without showing success though on refresh on another page that reflected on invoice but didn’t show on unit payments or payment summary report and also on customer statement. {Disable receive payment option from Finance section}
7. I made 100/= as the initial payment for B204, the unit shows under sold units but I cant find it on offer letter to make other additional payments.
8. After reserving, the make payment option isnt active on both agent side and Tracy.
9. Currently with the production data captured, I see same unit showing up on legal offer letter and also on sale agreement. This shouldn’t be the case, a booking can only be in one place based on how much they’ve paid.
10. An agent with only one lead thats at sale agreement. From the dashboard both offer letter and sale agreement are showing 1 which shouldnt be the case please correct.
11. Dispatch at Legal is still not working, please have it dispatch, the agent uploads back the signed copy for offer letter. Sale agreement should be dispatched, signed by customer, uploaded back by agent, then legal uploads to the customer the final copy signed on Liaison end.
12. Im also noticing the due date is same for all invoices despite having put the years. Starting date of an invoice should be the date one selected when receiving first invoice.
13. Subsequent payments section in finance doesn’t have view to see attachments and reference number/code
14. I also realize everytime I go to raise a payment the default amount is 85k, please remove it and have it as blank.
15. I've made a reservation for a unit but when I click on the reserved from agent side I cant find anything. When I login as Tracy and go to reserved the unit is there. Add agent name on the reserved section.
16. Also the recurring cycle seems to default to quarterly, I guess you meant this to be selected during 1st payment so that it picks from there onwards and then it would determine when the next payment should be expected
17. Check whats causing options selection not work after first click. i.e if you click may payment and click again it wont pop till you refresh.
18. Adding subsequent payments from agent side is not working, keeps rolling.
19. When agent clicks view on sold units, they see attachments that are not related to the sold unit, please correct this to show show related documents to the unit. Also the same was happening when viewing an application under offer letter thought now its not showing, just confirm it showing right.
20. On client statement under reports, do we need the date column? If you also feel it must not be there you can remove or advise.
21. Search is working on units for sale but not working on admin units and sold units.
22. On the invoice report, how does one know which client is overdue so that they follow up? i.e if a client payment schedule is monthly/quarterly/semi annually how they know if no payment has been made at the time of the schedule and by how much?
23. I realize that under sold units, values for unit payment deposit and unit payment balance remain constant at 25% and 75% irrespective of what you pay. This should be calculating actual percentages as payments come through. {remove this columns to avoid questions}
24. We also said general summary under reports simply remove it as its duplicate of dashboard
25. We forgot to have the option to browse existing customer when doing reservations as well as prospects. The setup assumes every customer reserving is a new.
26. I realize when you click on a customer statement, the unit area is measured in me as opposed to sqft.
27. Confirm if receipts are going to customer upon finance confirming payment
28. Confirm if recurring payments invoice alerts are going out on monthly/quarterly/semi annually.
29. Remember the dashboard was to show numbers in such a way someone can filter by project. Also the tiles should be active such that its clickable, you click on pending invoices it takes you to invoices if you have permissions to view.
30. When adding a unit, Have Initial Sale Amount and Actual Sale Amount [Unit amount]. They use this to compare how much discount is given per unit.