

## **UPDATES OF A PHYSICAL MEETING HELD ON 12<sup>TH</sup> FEBRUARY 2025**

A physical meeting was held on 12<sup>th</sup> February 2025 between Bk Autos Limited and Team Web to discuss on the pending issues on the Erp implementation and to plan on a way forward.

Items that were pending at the start of the meeting included:

- Bk website changes to ensure that leads get to submit their documents in a format compatible with Erp
- WhatsApp integration that had not been previously developed
- The insurance report that still needed some alignment
- Client loan amount balance that was not subtracting despite payment
- Penalty tab not able to show any figure
- Inability to have a view of the clients' statement
- Requisition function not having a submit option and no supplier tab provided
- Notifications
- Importation of clients' loan balances that was considered as a scope creep.
- Bilhah not able to approve leads due to mandatory fields of loan amount and loan type

During the meeting some items got resolved.

- The requisition function that now is fully functional
- The marketing calendar to be adopted as it is.
- The fleet management is also functional

During the meeting it was agreed that

### **LEADS & MARKETING**

- The Erp team to work on the WhatsApp integration to enable communication with the clients.
- The website to have a user account that will be linked to Erp to enable leads submit their documents and to update on expired documents once renewed
- The loan type and loan amount not to be made mandatory during lead approval by the director.

### **ACCOUNTING**

- The Erp team to work on the importation of client balances as at the end of February 2025 after an agreed additional amount of Kes 30,000 to the initial quoted price of 350,000.
- Required fields of clients accrued balances and penalties to be shared with their last payment date being 27<sup>th</sup> February 2025.
- The Erp team to work on the client loan balances, amount paid and penalties on the loan accounts to ensure correct balances for the clients.
- Clients to be notified to begin paying with their IDs on account to align with Erp.
- The Erp team to work on having a section that will enable capture all the units held by clients with their individual costs, units that have been repossessed, cleared and track units on transit

### **INSURANCE**

- The Erp team to also work on the insurance report and align it to the shared format as earlier discussed.
- The insurance report to be completed with a tab to attach a valuation report and sticker. The PAC cover also to include the necessary fields as earlier shared which include fields to add beneficiary details.

**The ERP team promised to have all these done by the 28<sup>th</sup> day of February 2025 to allow the BK team fully use ERP beginning 1<sup>st</sup> March 2025.**

