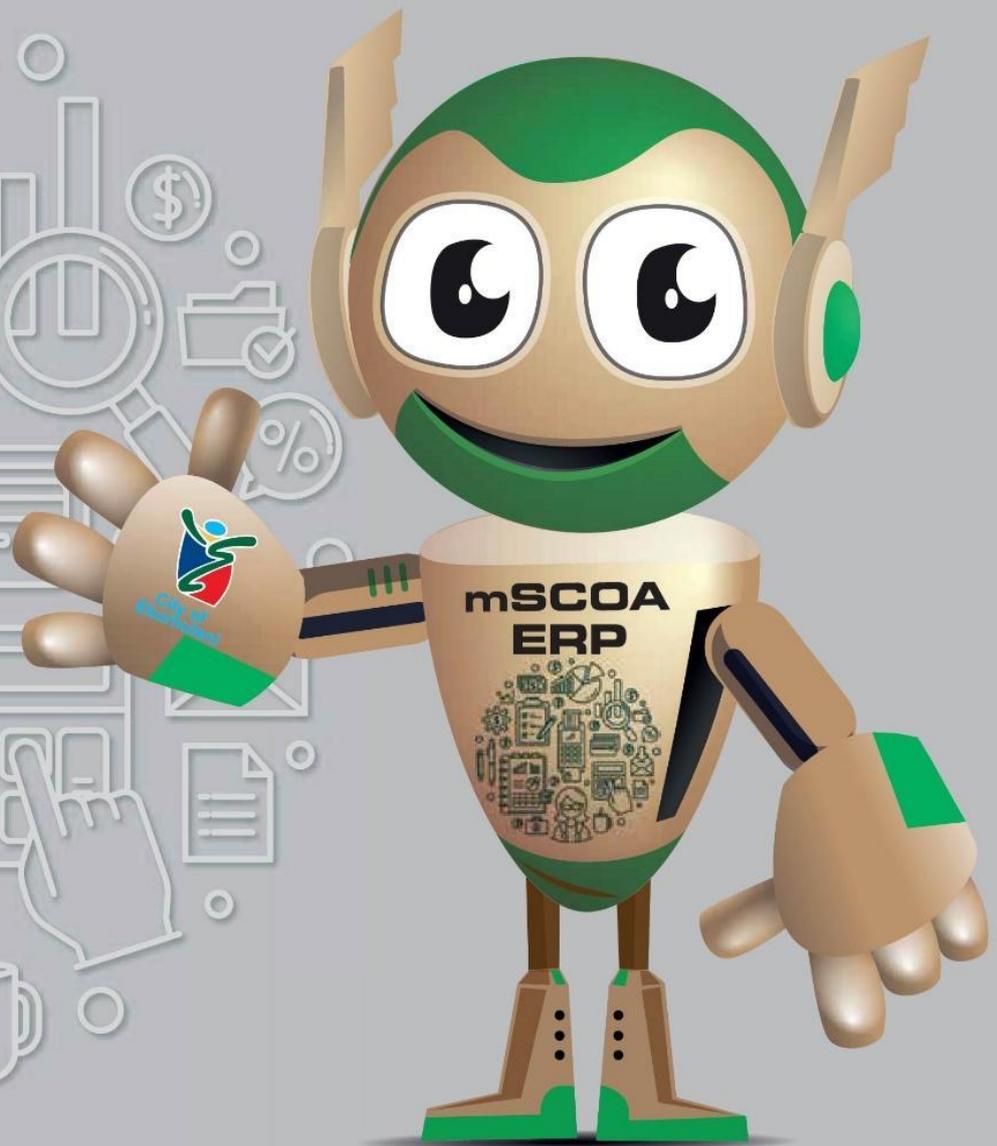


# ERP Functional USER MANUAL

# Training Manual

## Property Lease Management Revenue Officer



OUR JOURNEY  
TO A SMART DIGITAL CITY



# TABLE OF CONTENTS

1	OVERVIEW .....	2
•	1.1 INTRODUCTION .....	2
•	1.2 mSCOA ERP .....	4
2	GENERAL SYSTEM INFORMATION.....	5
3	LEARNING REQUIREMENTS.....	6
4	LEARNING EXPECTATIONS.....	6
5	LEARNING JOURNEY .....	7
6	KEY AREAS OF LEARNING.....	8
7	LEARNING OUTCOMES.....	8
8	KEY ICONS WITHIN THE LEARNING MATERIAL .....	9
9	LOGIN TO PLM.....	10
10	CAPTURING A RISK ASSESSMENT OUTCOME .....	12
11	VALIDATE DEPOSIT PAYMENT .....	23
12	VALIDATE DEBIT ORDER.....	27
13	REVIEW LEASE TERMINATION AND VALIDATE ACCOUNT .....	33
14	HELPFUL HINTS .....	39
15	ASSESSMENTS OF SPECIFIC LEARNING OUTCOMES.....	40
16	NEXT STEPS .....	40

# 1 OVERVIEW

## 1.1 INTRODUCTION

City of Ekurhuleni (COE) has a mandate to promote the Smart City concept for transformation, growth, development and ensure that all Ekurhuleni's citizens derive sustainable benefit from technology development. The Information and Communication Technology (ICT) department has a responsibility to ensure that ICT goals are aligned to and support the City's mission and strategic objectives of becoming a Smart, Creative and Developmental City, and that optimum business value is realized from ICT related investment services and assets. Information and Communication Technology (ICT) is one of the key strategic enabling departments within the City. It uses and leverages on the implementation of technology to enable the City to deliver services effectively and efficiently.



Figure 1: City Model

The municipal reference model has been set as a standard capability reference for all the departments. It illustrates the core, enabling/ support functions and its relevant systems, and the different stakeholders involved.

Governance and Monitoring is an overarching capability providing an oversight to all capabilities in the municipality.

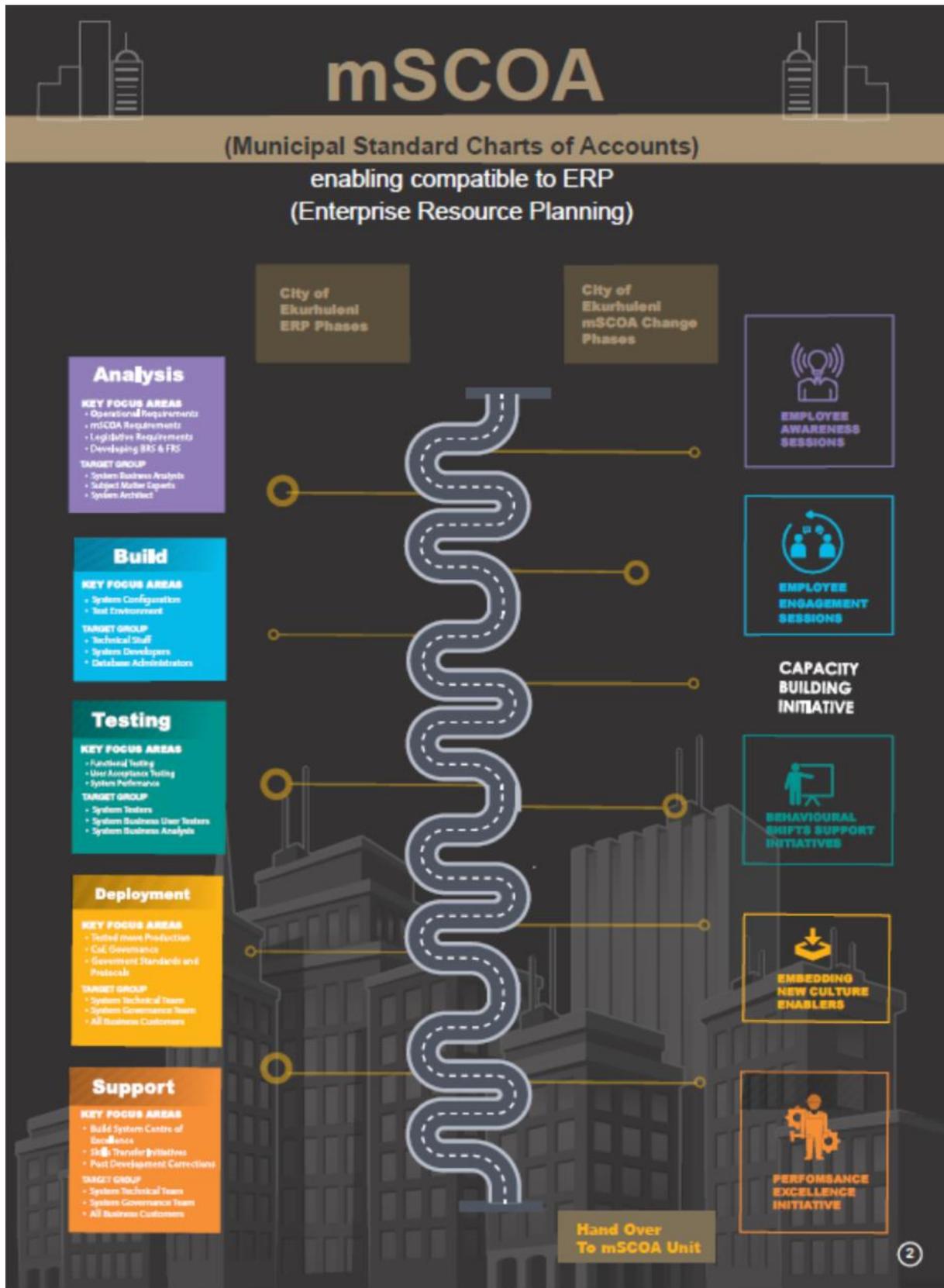
Strategy capability is responsible for all planning and budget related capability for the CoE municipality. Evaluating existing business unit strategy based on the company's strategy and eliminate unwanted/unnecessary resources/elements and re-consider necessary resources to meet the overall company's strategy.

Core capability is all the municipality business processes mandated by the municipal act, to provide all constitutionally mandated services as prescribed by the Section 4 B and Schedule 5 Part B of the constitution.

Enabling/Supporting capability is all the transversal function within the municipality, that provide support to core process with a view to deliver the municipal mandated services.

Enabling Technology is all the systems/ applications used by the municipality to support internal business process, each capability layer will comprise associated applications.

• 1.2 mSCOA ERP



## 2 GENERAL SYSTEM INFORMATION

Property Letting is one of the revenue generating streams within EHC, which is an entity owned by the city, its mandate is to manage the leasing of city owned flats, which are for social housing to people earning between R3500 and R15 000. EHC does not have any system to support their leasing function. Most of the processes are still managed manually using spreadsheets which has negative effect on operations and the reporting thereof. There is a need to implement a fully integrated system, that will support the Property Lease Management capability end to end for EHC.

### 3 LEARNING REQUIREMENTS

It is expected that learners have the following pre-requisites:

- Computer literacy
- A good understanding of the Property Lease Management (PLM) system.
- Learners with special learning needs are required to inform their manager and the trainer.

This User Guide is intended for the following audience:

- Revenue Officer

### 4 LEARNING EXPECTATIONS

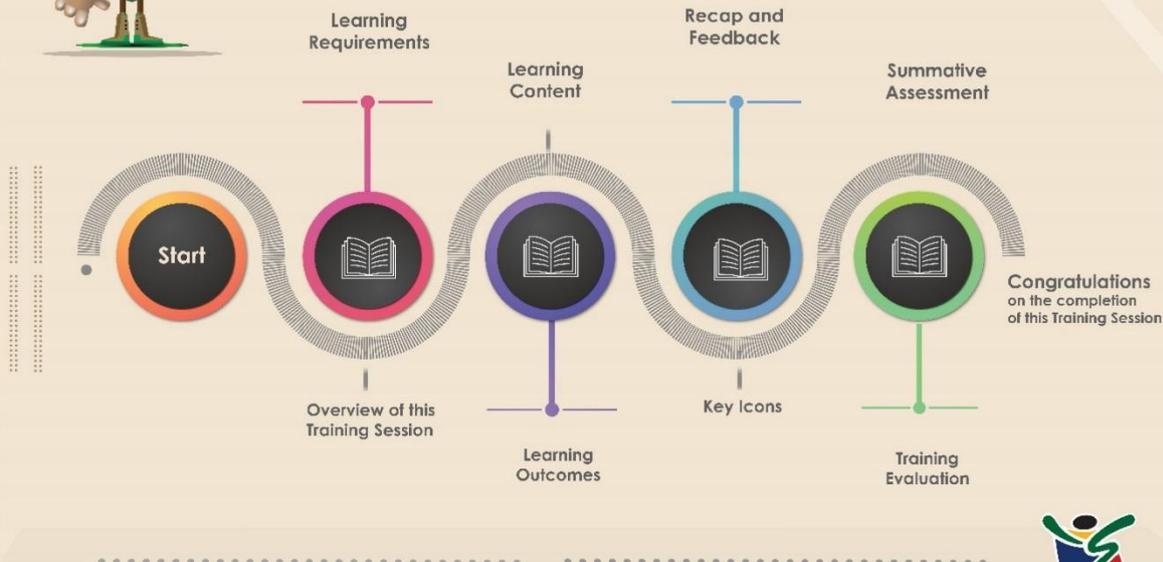
**Understand System Concepts:**

- System Login
- Capture Risk Assessment Outcome
- Validate Deposit Proof of Payment and Debit order Authority

# 5 LEARNING JOURNEY



## Welcome mSCOA ERP Learner!



a partnership that works  
[www.ekurhuleni.gov.za](http://www.ekurhuleni.gov.za)



## 6 KEY AREAS OF LEARNING

1	LOGIN TO PLM
2	CAPTURING A RISK ASSESSMENT OUTCOME
3	VALIDATE DEPOSIT PAYMENT
4	VALIDATE DEBIT ORDER
5	REVIEW LEASE TERMINATION AND VALIDATE ACCOUNT

## 7 LEARNING OUTCOMES

At the end of this module, you will be able to:

- Navigate the Property Lease Management system (PLM).
- Learn how to access information in the system and actioning applications.

## 8 KEY ICONS WITHIN THE LEARNING MATERIAL

	Note
	Activity
	Information
	Learning Outcomes

## 9 LOGIN TO PLM



After completing this sub-section, you will be able to successfully login to Property Lease Management as the Revenue Officer.



The process begins when you as the Revenue Officer opens the Google chrome web browser and inputs the following link in the browser search pane: <https://propertylease.ekurhuleni.gov.za> , where you will be navigated to the City of Ekurhuleni Property Lease Management landing page.



User must be able to sign in, to work on the Property Lease Management system.

### Navigate



On this screen:

- Click **Profile** dropdown arrow on the left navigation panel.
- Click on the **Sign In** item.
- You will be navigated to the **Sign In** page.

### Screen



CoE PLM Landing Page - Profile

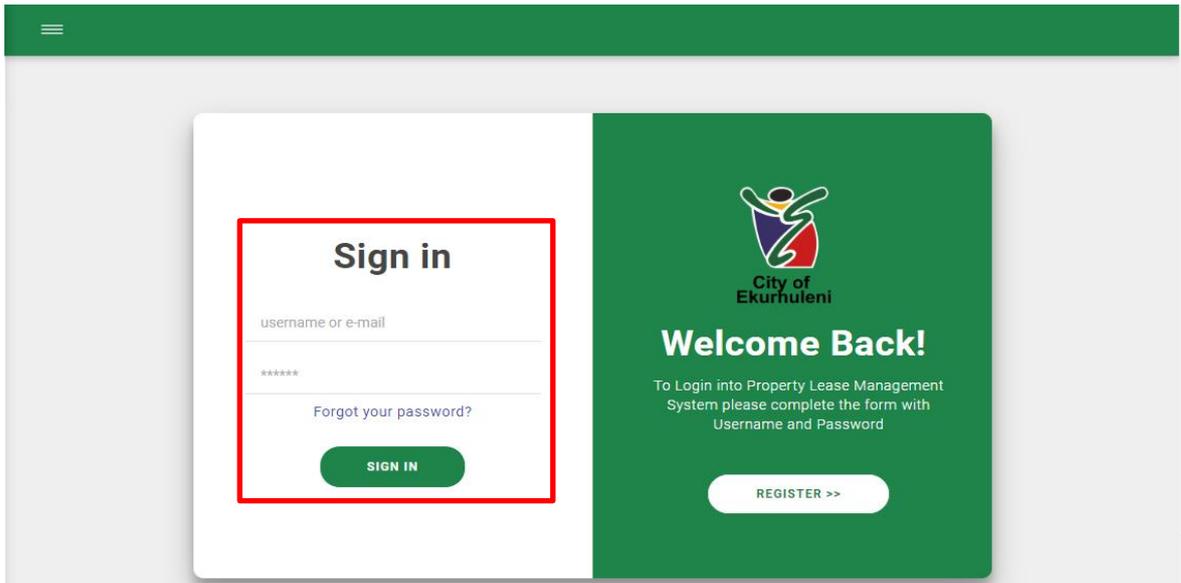
### Navigate



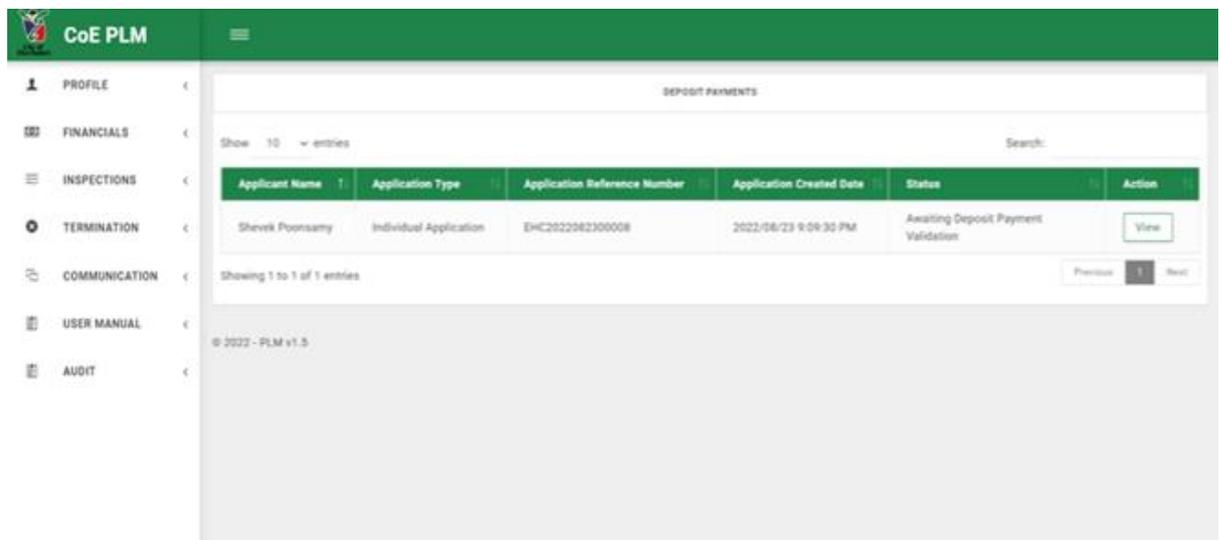
On this screen:

- Enter your active directory **Username and Password**
- Click on the **Sign In** button
- You will be navigated to the **Deposit Payments** page.

### Screen



Sign In Page



Deposit Payments Page

You have now successfully completed this sub-section

## 10 CAPTURING A RISK ASSESSMENT OUTCOME



After completing this sub-section, you will be able to view the application and capture the risk assessment outcome.

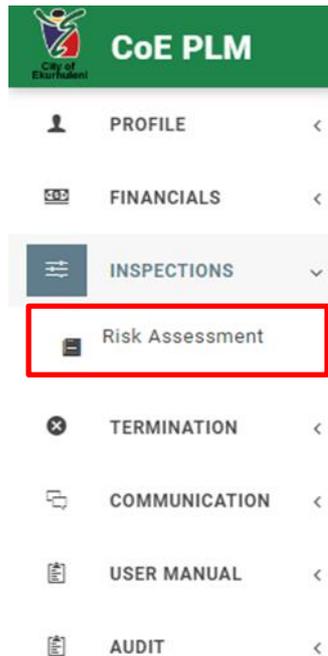
### Navigate



On this screen:

- Click **Inspections** dropdown arrow on the navigation panel.
- Click **Risk Assessment**
- You will be navigated to the **Risk Assessments and Submitted Lease Applications** page.

### Screen



### Navigation Panel

### Navigate



On this screen:

- Under **Risk Assessment Application** sub-heading, it will display all customer applications that are in **Awaiting Risk Assessment Outcome** status.

- Click the **Assess** button on the application of choice.
- You will be navigated to the **Application Details**.

### Screen

**RISK ASSESSMENT APPLICATIONS**

Show 10 entries Search:

Applicant Name	Application Type	Application Reference No.	Application Created Date	Status	Action
Betty Masekwameng	Individual Application	EHC2022072000001	2022/07/20 9:02:57 AM	Awaiting Risk Assessment Outcome	Assess
Thandi Zondo	Individual Application	EHC2022072100001	2022/07/21 11:54:05 AM	Awaiting Risk Assessment Outcome	Assess

Showing 1 to 2 of 2 entries Previous 1 Next

**SUBMITTED LEASE APPLICATIONS**

Show 10 entries Search:

First Name	Lease Type	Lease Reference No.	Lease Created Date	Status	Action
Ziphelele Buje	Individual Application	EHC2022071100003	2022/07/11 12:42:35 PM	Awaiting Risk Assessment Outcome	Assess

Showing 1 to 1 of 1 entries Previous 1 Next

### Risk Assessments and Submitted Lease Applications Page

### Navigate



On this screen:

- You will have an overview of the **Application Details** page presented, with **Risk Assessment Response** and **Risk Assessment Documents**.
- Click on the **View** button
- You will be navigated to the **Application** page.

### Screen

APPLICATION DETAILS

Applicant Name	Application Type	Application Reference No.	Application Created Date	Status	Action
Thandi Zondo	Individual Application	EHC2022072100001	2022/07/21 11:54:05 AM	Awaiting Risk Assessment Outcome	<a href="#">View</a>

Risk Assessment Response

First Name:       Official Number\*

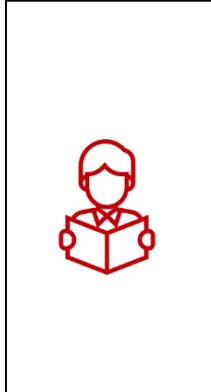
Last Name:       Date Stamp:

Outcome\*  ▼

Comment

**Application Details/ Risk Assessment Response Page**

**Navigate**



On this screen:

- You will have an overview of the following sections:
  - Application Information
  - Unit Space Type
  - Matched Unit Details
- Click **Next** to proceed to the **Applicant** tab.

**Screen**

### Application Tab

### Navigate



On this screen:

- You will have an overview of the following sections:
  - Applicant Information
  - Applicant Current Address
  - Applicant's Income Details
- Click **Next** to proceed to the **History** tab.

### Screen

The screenshot displays a web application interface with a green header and a grey navigation bar. The navigation bar contains four tabs: '1 Application', '2 Applicant' (highlighted with a red box), '3 History', and '4 Documents'. The main content area is titled 'Applicant Information' and contains the following fields:

Name of Applicant	Mrs A Masindi	ID No. of Applicant	9312222968083
Nationality	South African		
Cell No	0725553034	Work No	0119993634
Home Number	0725553034	Email Address	Floyd.Phatane@Ekurhuleni.gov.za

Below this is the 'Applicant Current Address' section:

Physical Address	118 centropoint 3 market street	Suburb	118 centropoint 3 market street	Postal Code	1459
------------------	---------------------------------	--------	---------------------------------	-------------	------

The 'Applicant's Income Details' section contains:

Source of Income	Salary		
Gross Income	30000,00	Net Income	25000,00

At the bottom of the form, there are three buttons: 'Close', 'Previous', and 'Next' (highlighted with a red box). The footer of the page reads '© 2022 - PLM'.

### Applicant Tab

### Navigate



On this screen:

- You will be able to view all **Property Application History** details, such as:
  - Actioned By
  - Action Description
  - Time Stamp
- Click **Next** to proceed to the **Documents** tab.

### Screen

Property Application History

Show 10 entries

Actioned By	Action Description	Time Stamp
Dimakatso Legoabe	Email Sent From System To Back Office. Email Content: Please note a new case has been allocated to your Risk Assessment queue. Reference Number: EHC2022072100001. Please Login and action.	2022/07/21 12:10:39 PM
Miss Thandi Zondo	Property Lease Management application captured by the applicant By Thandi Zondo for Ekurhuleni Housing	2022/07/21 11:54:06 AM
Miss Thandi Zondo	Email Sent From System To Back Office. Email Content: You have successfully captured your application. It is currently in Awaiting Re-Upload of Documents status. Reference Number: EHC2022072100001. Please Login and action.	2022/07/21 11:54:06 AM
Miss Thandi Zondo	Application Status Changed From "In Awaiting Re-Upload of Documents" To "Awaiting Risk Assessment Outcome".	2022/07/21 12:10:38 PM
Miss Thandi Zondo	Applicant Uploaded Application Documents	2022/07/21 12:10:39 PM
Miss Thandi Zondo	Email Sent From System To Back Office. Email Content: You have successfully uploaded documents for EHC2022072100001. The application has been moved to Awaiting Risk Assessment Outcome status. Please await risk assessment.	2022/07/21 12:10:39 PM
Miss Thandi Zondo	Applicant Uploaded Application Documents	2022/07/21 12:10:39 PM

Showing 1 to 7 of 7 entries

Close Previous **Next**

### History Tab

### Navigate



On this screen:

- You will be able to view all attached documents that have been uploaded by the applicant.
- To view a document, click on the **Download** button.
- Further down the page, click on the **Close** button.
- You will be re-directed to the **Application Details** page, whereby you can provide a **Risk Assessment Response**.

### Screen

1 Application 2 Applicant 3 History 4 Documents

PROPERTY APPLICATION DOCUMENT/S

Show 10 entries Search:

Document Type	Link	Description
Additional Document	Download	Additional Documentation Uploaded On 2022-07-21 12:10:59
Affidavit Document	Download	Affidavit Uploaded On 2022-07-21 12:10:41
Bank Statement	Download	Three (3) months Uploaded On 2022-07-21 12:10:40
Confirmation of Employment	Download	Proof of employment Uploaded On 2022-07-21 12:10:40
Identity Document	Download	Copy of ID Uploaded On 2022-07-21 12:10:37
Payslip/Proof of Pension Grant	Download	Proof of income Uploaded On 2022-07-21 12:10:39
Proof of Residential Address	Download	Copy of Proof of Address Uploaded On 2022-07-21 12:10:41

Showing 1 to 7 of 7 entries Previous 1 Next

### Documents Tab

Risk Assessment Supporting Document Supporting Document

Additional Document Additional Documentation

EXIT INSPECTION DOCUMENT/S

Document Type	Link	Description
Completed Exit Insection Document		Exit Inspection
Additional Document		Additional Documentation

Close Previous

© 2022 - PLM

### Documents Tab



- The Comments field is mandatory to complete when the Rejected Outcome was selected.
- The Applicant will be notified of the Risk Assessment outcome that their application was unsuccessful based on reasons submitted on the comment section.

### Navigate



On this screen:

Under the **Risk Assessment Response**, you will need to:

- Capture the **Official Number**
- Select an **Outcome**, such as **Approve**.
- Input a **Comment** (If applicable)

### Screen

APPLICATION DETAILS

Applicant Name	Application Type	Application Reference No.	Application Created Date	Status	Action
Thandi Zondo	Individual Application	EHC2022072100001	2022/07/21 11:54:05 AM	Awaiting Risk Assessment Outcome	<button>View</button>

Risk Assessment Response

First Name: Legoabe  
Last Name: Dimakatso  
Date Stamp: 2022/08/08 11:57:16 AM

Official Number\*

Outcome\* -- Select Option -  
Comment

### Risk Assessment Response



The process to upload Additional Documentation, will be the same as Uploading the Risk Assessment Document.

### Navigate

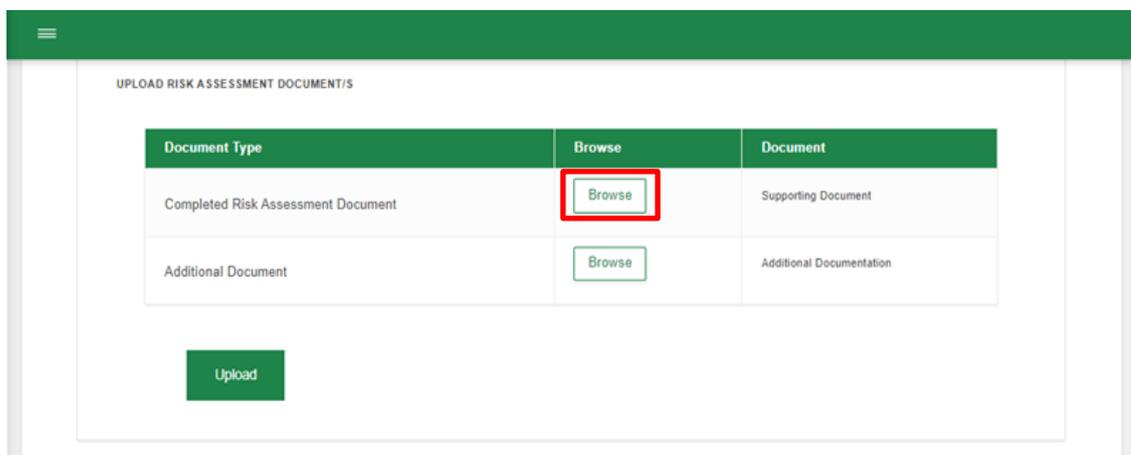


On this screen:

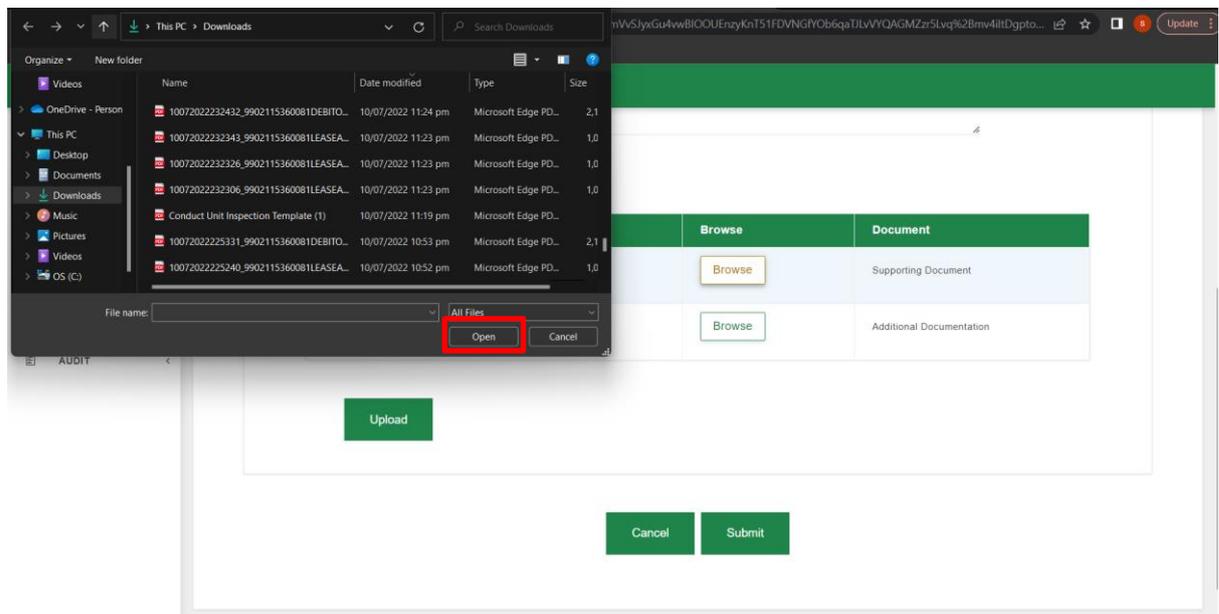
- Under the **Upload Risk Assessment Documents** sub-section, click **Browse**
- Select the necessary document from your computer files.
- Click on the **Open** button
- The document will be attached. (The document name will reflect in the document coloumn)
- Click **Upload** to proceed with the upload.

- A popup notification will display: **Document(s) Uploaded.**
- Click **Ok** to remove popup box.
- The document name will change from black text to blue.
- Click on the **Submit** button
- A confirmation popup box will display, **Are you sure you want to submit this risk assessment?**, Click **Yes, I am sure!** to acknowledge.
- You will be re-directed to the **Risk Assessment Applications** page.

### Screen



**Upload Risk Assessment Document/s**



**Selecting Document from Computer Files**

UPLOAD RISK ASSESSMENT DOCUMENT/S

Document Type	Browse	Document
Completed Risk Assessment Document	<input type="button" value="Browse"/>	Risk Assessment Doc.pdf Supporting Document
Additional Document	<input type="button" value="Browse"/>	Additional Documentation

**Documents Attached**

CoE PLM

Progress

Document(s) Uploaded

**Progress Popup – Documents Uploaded**

UPLOAD RISK ASSESSMENT DOCUMENT/S

Document Type	Browse	Document
Completed Risk Assessment Document	<input type="button" value="Browse"/>	Risk Assessment Doc.pdf x Supporting Document
Additional Document	<input type="button" value="Browse"/>	Additional Documentation

**Uploaded Document**

Are you sure you want to submit this risk assessment?

**Confirmation Popup**

RISK ASSESSMENT APPLICATIONS					
Show 10 entries			Search:		
Applicant Name	Application Type	Application Reference No.	Application Created Date	Status	Action
Betty Masekwameng	Individual Application	EHC2022072000001	2022/07/20 9:02:57 AM	Awaiting Risk Assessment Outcome	<a href="#">Assess</a>
Showing 1 to 1 of 1 entries					Previous 1 Next

SUBMITTED LEASE APPLICATIONS					
Show 10 entries			Search:		
First Name	Lease Type	Lease Reference No.	Lease Created Date	Status	Action
Ziphelele Buje	Individual Application	EHC2022071100003	2022/07/11 12:42:35 PM	Awaiting Risk Assessment Outcome	<a href="#">Assess</a>
Showing 1 to 1 of 1 entries					Previous 1 Next

### Risk Assessments/ Submitted Lease Applications Page



- The Customer will be notified via email that their application has been approved for risk assessment. The application has been placed in the waiting list for available unit offers. They will be notified once matched.
- The application will be moved to the applicant.

**You have now successfully completed this sub-section**

# 11 VALIDATE DEPOSIT PAYMENT



After completing this sub-section, you will be able to validate the deposit proof of payment.



Once the applicant has uploaded the proof of deposit payment, you are required to validate the proof of payment.



The application status will be Awaiting Deposit Payment Validation.

## Navigate



On this screen:

- Once logged in, you will be on the **Deposit Payments** page.

OR

- Select **Deposit Payments** under the **Financials** item on the navigation panel.
- You will be navigated to the **Deposit Payments** page.
- Click the **View** button on the application that needs to be validated.
- You will be navigated to the **Attached Documents** page.

## Screen

The screenshot displays the CoE PLM system interface. On the left, a navigation menu is visible with 'FINANCIALS' expanded and 'Deposit Payments' highlighted with a red box. The main content area is titled 'DEPOSIT PAYMENTS' and features a table with the following data:

Applicant Name	Application Type	Application Reference Number	Application Created Date	Status	Action
Shevek Poonsamy	Individual Application	EHC2022082300008	2022/08/23 9:09:30 PM	Awaiting Deposit Payment Validation	View

The 'View' button in the 'Action' column is highlighted with a red box. Below the table, it indicates 'Showing 1 to 1 of 1 entries' and includes 'Previous', '1', and 'Next' navigation buttons. The footer of the page shows '© 2022 - PLM v1.5'.

**Deposit Payments Page**

## Navigate



On this screen:

- Under **Evaluating Applications** sub-section, click on the **View** button.
- This gives you access to view information on the application, such as:
  - Application Details
  - Applicant Details
  - History
  - Documents

## Screen

Reference Number	Applicant Type	Status	Captured Date	Customer Name	Action
EHC2022072100001	Individual Application	Awaiting Deposit Payment Validation	2022/07/21 11:54:05 AM	Thandi Zondo	<a href="#">View</a>

## Evaluating Application



- Rejecting the deposit proof of payment , will retain the Application Status to Awaiting Deposit Payment Validation.
- The customer will get a notification to reload or fix the document.

## Navigate



On this screen:

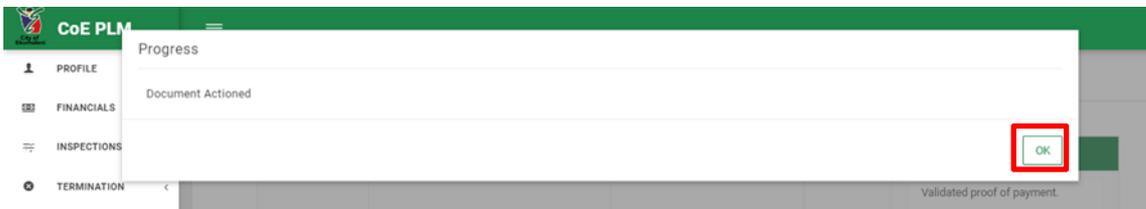
- Under **Attached Documents** sub-section, clicking on the **Download Documents** name, allows you to view the proof of deposit payment.
- Input a **Comment** in the text box.
- Select **Status** as Approved (approving of the proof of payment).
- A popup notification will display: **Document Actioned**.
- Click **Ok** to remove popup box.
- Select **Approval Status** As Approved to proceed with the application process.
- Click **Submit**

- A confirmation popup box will display, **Are you sure you want to submit this application for validation?**, Click **Yes, I am sure!** to acknowledge.
- You will be re-directed to the **Deposit Payments** page.

**Screen**

Document	Download Document	Description	Status	Comment
Proof Of Payment	<a href="#">Deposit Proof of Payment.pdf</a> Uploaded On 2022-08-08 20:40:13	For Rental Deposit, R7 929,70 Amount Required	Uploaded	<input type="text"/> Select status ▾

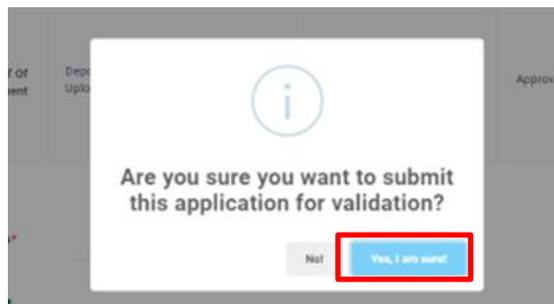
**Attached Documents**



**Progress Popup – Document Actioned**



**Final Approval**



**Confirmation Popup**

**Deposit Payments Page**



- The Customer will be notified via email that their deposit payment has been validated and approved.
- The application will move to the Community Development Officer’s work queue.

**You have now successfully completed this sub-section**

## 12 VALIDATE DEBIT ORDER



After completing this sub-section, you will be able to validate the debit order.



Once the customer has given debit order authority, you are required to validate and upload the signed debit order form.



The application status will be Debit Authority Form Generated.

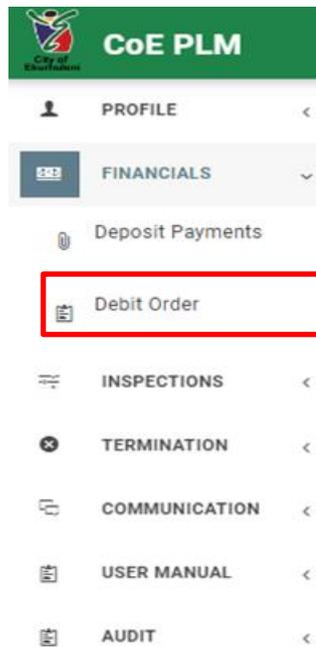
### Navigate



On this screen:

- Click **Financials** dropdown arrow on the navigation panel.
- Click **Debit Order**
- You will be navigated to the **Submitted Applications** page.

### Screen



Navigation Panel

### Navigate



On this screen:

- Click the **Debit Order Validation** button on the application of choice.
- You will be navigated to the **Generate Debit Order Authority** page.

### Screen

CoE PLM

PROFILE < FINANCIALS < INSPECTIONS < TERMINATION < COMMUNICATION < USER MANUAL < AUDIT <

SUBMITTED APPLICATIONS

Show 10 entries Search:

Applicant Name ↑	Application Type ↑	Application Reference Number ↑	Application Created Date ↑	Status ↑	Action ↑
SHEVEK POONSAMY	Individual Application	EHC2022082800004	2022/08/28 7:03:53 PM	Debit Authority Form Generated	Debit Order Validation
SHEVEK POONSAMY	Individual Application	EHC2022082800005	2022/08/28 7:10:26 PM	Debit Authority Form Generated	Debit Order Validation
SHEVEK POONSAMY	Individual Application	EHC2022082800008	2022/08/28 7:37:24 PM	Debit Authority Form Generated	Debit Order Validation

Showing 1 to 3 of 3 entries

Previous 1 Next

© 2022 - PLM v1.5

### Submitted Applications Page

### Navigate



On this screen:

- Under **Evaluating Application** sub-section, clicking on the **View** button gives you access to view information on the application, such as:
  - Application Details
  - Applicant Details
  - History
  - Documents
- Click on the **View** button in the **Document** column.
- The **Debit Order** form will be downloaded to your computer files for your viewing.
- After viewing the document, select the **Approve** option next to **Signature**.

### Screen

**CoE PLM**

PROFILE < FINANCIALS < INSPECTIONS < TERMINATION < COMMUNICATION < USER MANUAL < AUDIT <

EVALUATING APPLICATION

Show 10 entries Search:

Reference Number	Applicant Type	Status	Captured Date	Customer Name	Action
EHC2022082800004	Individual Application	Debit Authority Form Generated	2022/08/28 7:03:53 PM	Mr SHEVEK POONSAMY	<a href="#">View</a>

Showing 1 to 1 of 1 entries Previous 1 Next

GENERATED DEBIT ORDER AUTHORITY

Document Type	Document	Action
Debit Order	<a href="#">View</a>	Signature - Select Option -

### Generated Debit Order Authority

EHC2022082800004.DEBITORDER (1).pdf 1 / 1 100%

**DEBIT CHECK REGISTRATION CONFIRMATION**

Ekurhuleni Housing Company (SOC)  
 T: +27 (0) 11 825 0158/0151 • F: +27 (0) 86 425 5030 • E: info@ehco.org.za  
 Hanover Building, Cnr Hendrick Potgieter & 7th Ave, Edenvale  
 W: www.ehco.org.za

Name of Applicant : SHEVEK POONSAMY  
 Unit no : C025, AIRPORT PARK  
 Reference no. : EHC2022082800004  
 ID no. : 9902115360081  
 Email : sashingoo@gmail.com  
 Cell no. : 0715537239  
 Bank Name & number: FNB, 10000000000  
 Rent amount : R2 519,96

### Debit Order Authority

### Navigate

On this screen:



- Click on the **Browse** button, to upload the **Signed Debit Order**.
- Select the necessary document from your computer files.
- Click on the **Open** button
- The document will be attached, in the **Document** column.
- Click **Upload** to proceed with the upload.
- A popup notification will display: **Document(s) Uploaded**.
- Click **Ok** to remove popup box.
- The document name will change from black text to blue.

## Screen

UPLOAD SIGNED DEBIT ORDER

Document Type	Browse	Document
Debit Order	<input type="button" value="Browse"/>	Signed Debit order

### Upload Signed Debit Order

File name: EHC2022082900010.DEBITORORDER

Approval Status: -- Select Option --

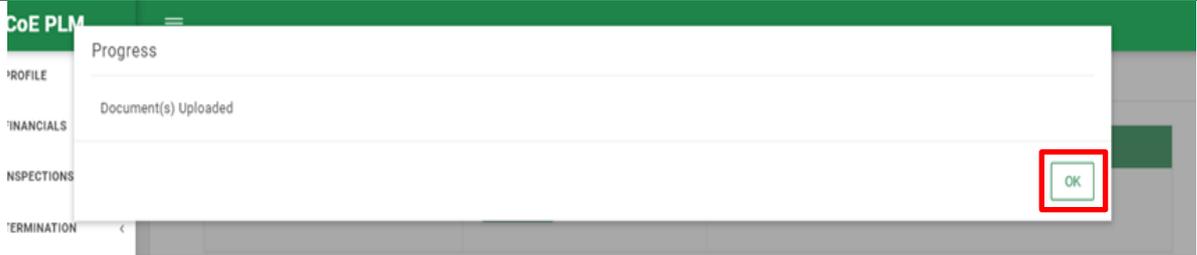
© 2022 - PLM v1.5

### Selecting Document from Computer Files

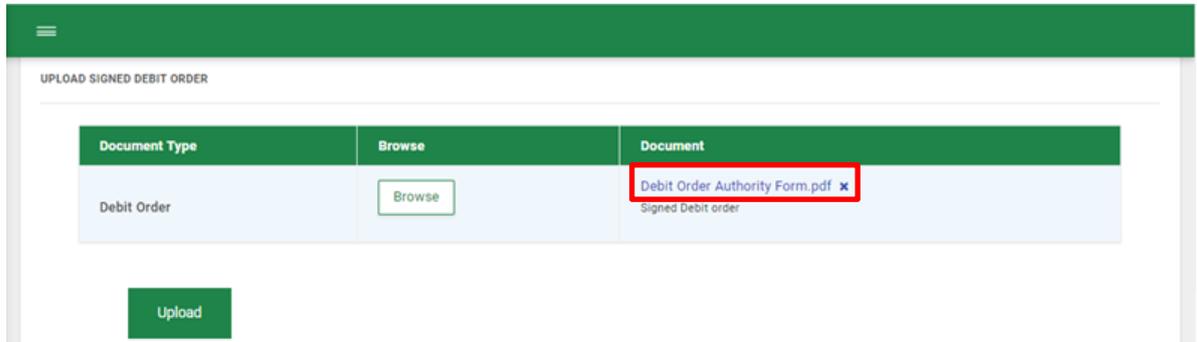
UPLOAD SIGNED DEBIT ORDER

Document Type	Browse	Document
Debit Order	<input type="button" value="Browse"/>	Debit Order Authority Form.pdf Signed Debit order

### Documents Attached



**Progress Popup – Documents Uploaded**



**Uploaded Signed Debit Order Form**



Under Approval Status, if Reject option is selected:

- It is mandatory to input a Comment.
- System retains the application status as Awaiting Debit Authority and will notify the Applicant of the rejection.

**Navigate**



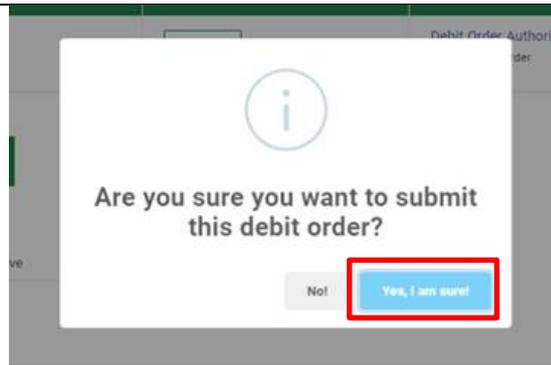
On this screen:

- Select **Approval Status**
- Click on the **Submit** button.
- A confirmation popup box will display, **Are you sure you want to submit this lease agreement?** Click **Yes, I am sure!** to acknowledge.
- You will be re-directed to the **Submitted Applications** page.

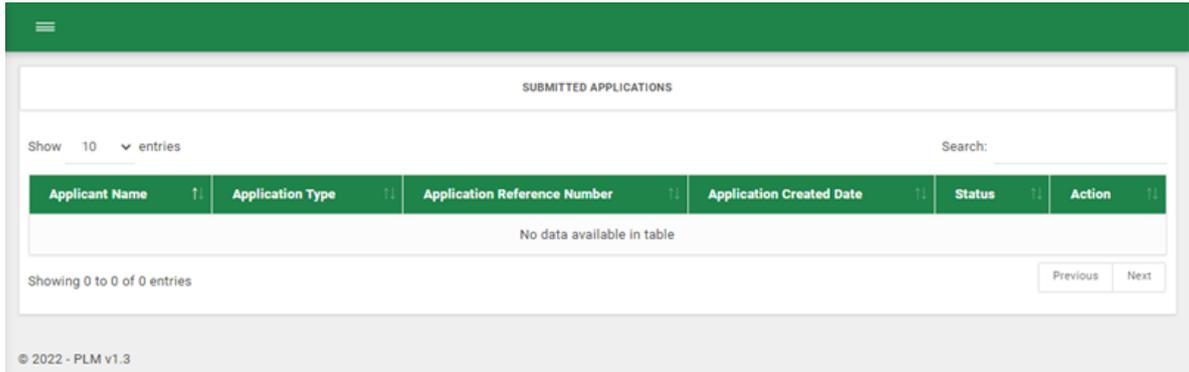
**Screen**



**Final Approval Status**



**Confirmation Popup**



**Submitted Applications Page**



The Customer will be notified that the debit order authority has been approved.

**You have now successfully completed this sub-section**

## 13 REVIEW LEASE TERMINATION AND VALIDATE ACCOUNT



After completing this sub-section, you will be able to review the lease termination and validate the account.



Once the Letting Officer has captured the Lease Termination, you are required to review and validate the account upon Lease Termination.



The application status will be Termination Due To Tenant Notice.

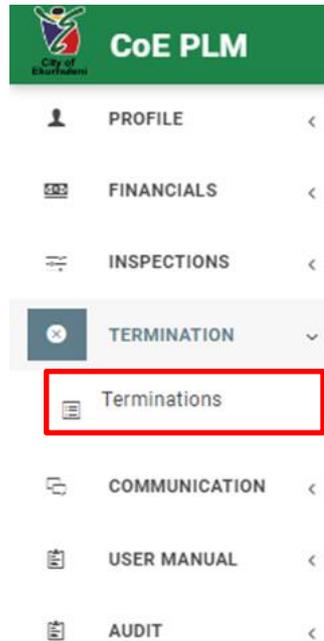
### Navigate



On this screen:

- Click **Termination** dropdown arrow on the navigation panel.
- Click **Terminations**
- You will be navigated to the **Tenants Application Termination** page.

### Screen



Navigation Panel

### Navigate



On this screen:

- Click **Account Validation** button on the application of choice.
- You will be navigated to the relevant page.

### Screen

Lease Reference No.	Tenant Name	Application Type	Lease Date	Status	Action
EHC2022071100005	Dube Macsean	Individual Application	2022/07/11 12:37:16 PM	Termination Due To Lease Not Renewed	Account Validation
EHC2022072100001	Zondo Thandi	Individual Application	2022/08/11 2:26:15 PM	Termination Due To Tenant Notice	Account Validation

### Tenants Application Termination Page

### Navigate



On this screen:

- Under **Evaluating Application** sub-section, clicking on the **View** button, enables you to view the following information, such as:
  - Application Details
  - Applicant Details
  - History
  - Documents
- Under **Tenant Lease Details** sub-section, clicking on the **View** button, enables you to view the following information, such as:
  - Applicant Details
  - Lease Information
  - Tenants Details
  - Applicant History
  - Occupant History
  - Documents
- You will also have an overview of the **Tenant Account Balance**, such as:
  - Deposit Amount Paid
  - Amount Due

## Screen

The screenshot displays a web interface for evaluating applications. It features three main sections: 'EVALUATING APPLICATION', 'TENANT LEASE DETAILS', and 'TENANT ACCOUNT BALANCE'. The 'EVALUATING APPLICATION' section includes a table with columns for Reference Number, Applicant Type, Status, Captured Date, Customer Name, and Action. A 'View' button in the Action column is highlighted with a red box. The 'TENANT LEASE DETAILS' section also has a table with similar columns, and its 'View' button is also highlighted with a red box. The 'TENANT ACCOUNT BALANCE' section shows a table with 'Deposit Amount Paid' (R7 929,00) and 'Amount Due' (R4 558,00).

Reference Number	Applicant Type	Status	Captured Date	Customer Name	Action
EHC2022072100001	Individual Application	Property Lease Application Completed	2022/07/21 11:54:05 AM	Thandi Zondo	View

Showing 1 to 1 of 1 entries

Lease Ref No.	Applicant Type	Status	Captured Date	Customer Name	Action
EHC2022072100001	Individual Application	Termination Due To Tenant Notice	2022/08/11 2:26:15 PM	Thandi	View

Deposit Amount Paid	Amount Due
R7 929,00	R4 558,00

### Evaluation Application, Tenant Lease Details and Tenant Account Balance

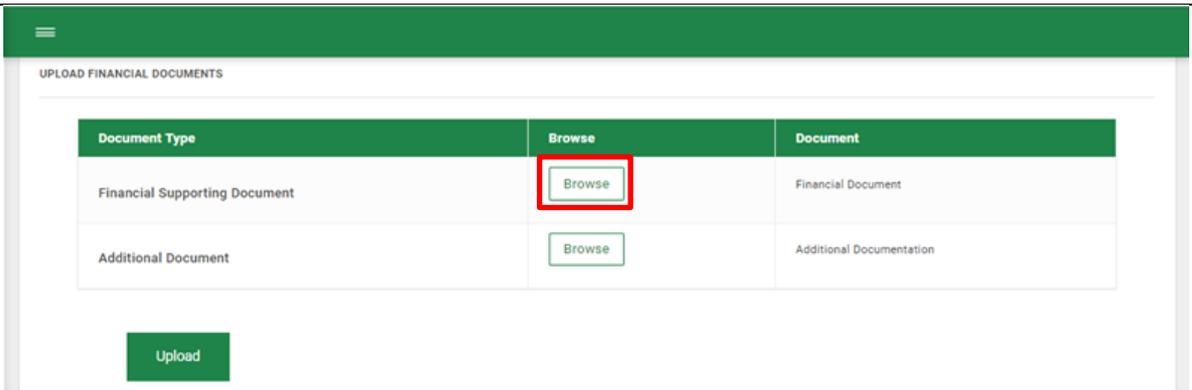
## Navigate



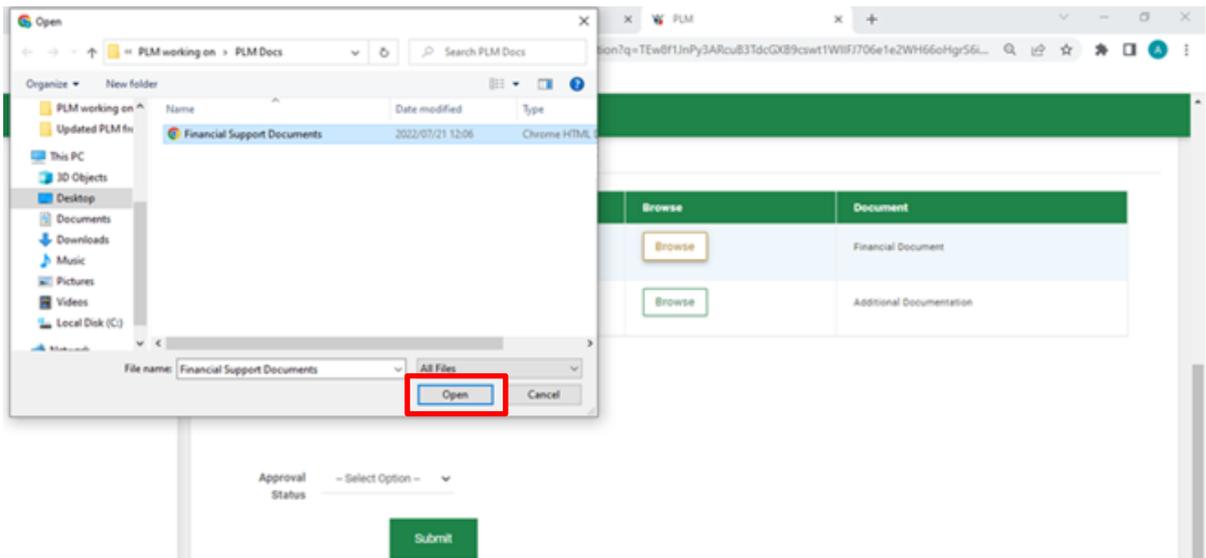
On this screen:

- Click on the **Browse** button, to upload the **Financial Document**.
- Select the necessary document from your computer files.
- Click on the **Open** button
- The document will be attached, in the **Document** column.
- Click **Upload** to proceed with the upload.
- A popup notification will display: **Document(s) Uploaded**.
- Click **Ok** to remove popup box.
- The document name will change from black text to blue.

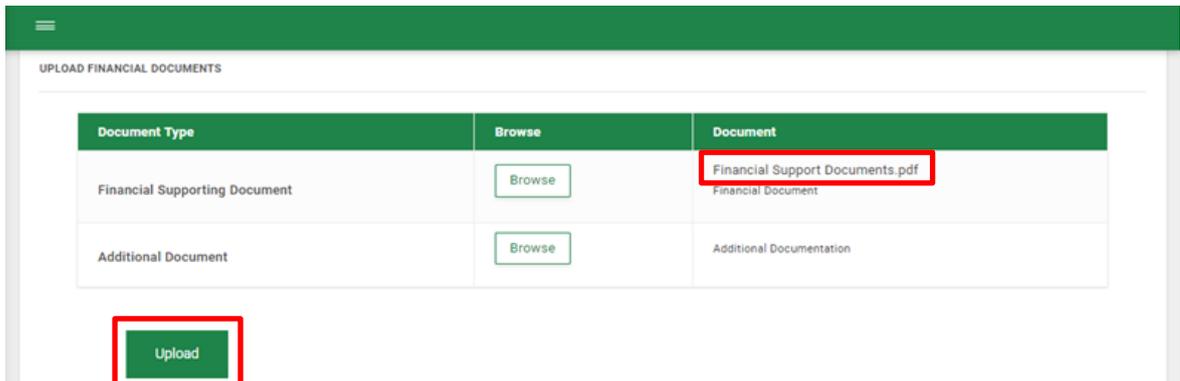
## Screen



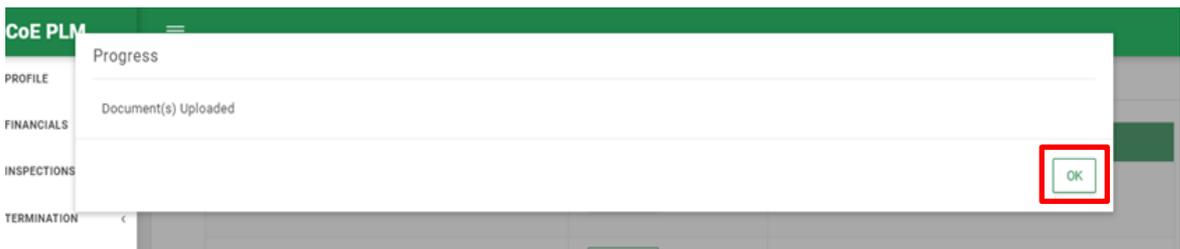
**Upload Financial Documents**



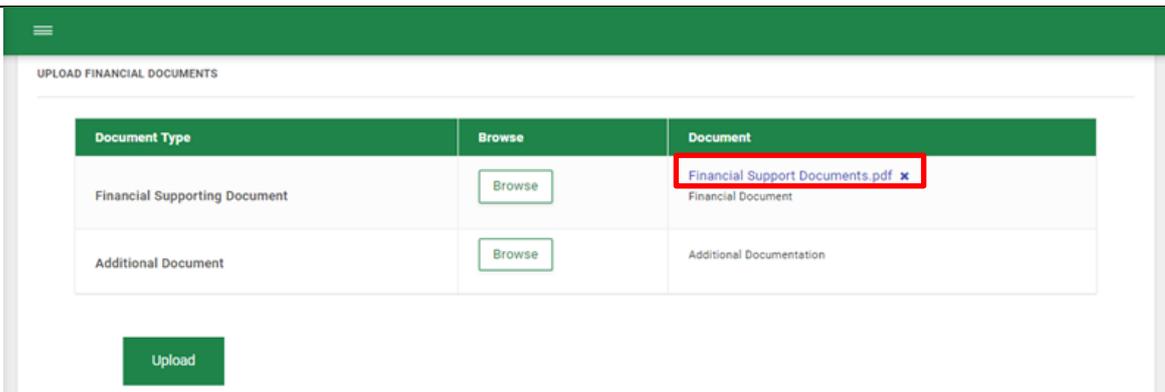
**Selecting Document from Computer Files**



**Documents Attached**



**Progress Popup – Documents Uploaded**



**Uploaded Financial Document**



Under Approval Status, if Reject option is selected:

- It is mandatory to input a Comment.
- System retains the lease application status and will not notify the Housing Supervisor.

**Navigate**



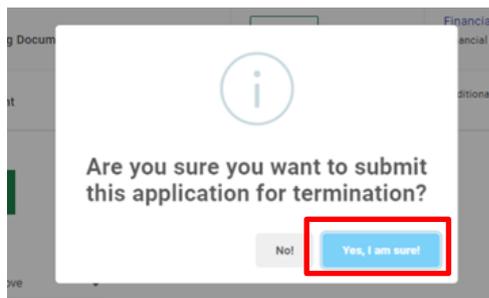
On this screen:

- Select **Approval Status**
- Click on the **Submit** button.
- A confirmation popup box will display, **Are you sure you want to submit this application for termination?** Click **Yes, I am sure!** to acknowledge.
- You will be re-directed to the **Tenants Application Termination** page.

**Screen**



**Final Approval Status**



**Confirmation Popup**

TENANTS APPLICATION TERMINATION					
Lease Reference No.	Tenant Name	Application Type	Lease Date	Status	Action
EHC2022071100005	Dube Macsean	Individual Application	2022/07/11 12:37:16 PM	Termination Due To Lease Not Renewed	Account Validation

Showing 1 to 1 of 1 entries

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### Tenants Application Termination Page



The termination notice will move to the Housing Supervisor’s work queue.

**You have now successfully completed this sub-section**

## 14 HELPFUL HINTS



- Be able to find useful guidelines throughout the application:

Screen	Navigate
	Clicking on COE PLM, refreshes the current page.
	The navigation bar allows you to expand or compress the left navigation panel.
* Red Asterisks	The Red Asterisks next to a specific field, means that it is mandatory to complete that field.
	The Browse button allows you to search your computer to find the relevant document that you would like to upload.
Search: <input type="text"/>	The Search functionality allows you to find what you are looking for.
	The View button allows you to view the attached/generated document.
 USER MANUAL <	Clicking on the User Manual item on the navigation panel, gives to access to view the guidelines of how to navigate the PLM system.

## 15 ASSESSMENTS OF SPECIFIC LEARNING OUTCOMES

Description of Learning Outcomes		
Were you able to?	Yes Tick ✓	No Tick ✓
LOGIN TO PLM		
CAPTURING A RISK ASSESSMENT OUTCOME		
VALIDATE DEPOSIT PAYMENT		
VALIDATE DEBIT ORDER		
REVIEW LEASE TERMINATION AND VALIDATE ACCOUNT		

## 16 NEXT STEPS

You will be required to complete the following:

	Training Evaluation
	Assessment



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