



GOLDEN TIGER REALTORS

You say Sell! we say Sold!!

Golden Tiger Realtors (Pty) Ltd

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Back Office Process: Loading Offers to Purchase (OTP)

1. Purpose

To ensure a clear, controlled, and auditable process for receiving, approving, tracking, and filing all Offers to Purchase (OTP) on the Back Office system.

2. Roles and Responsibilities

- **Agent**
Submits signed OTP and all supporting documents.
- **Bongi (Back Office – Document Control)**
Receives, scans, uploads, tracks OTPs, submits to Principal, Bond Originator and Conveyancer, and manages folder movement.
- **Seelan (Principal)**
Reviews and signs OTP before any external submission.
- **Bond Originator**
Confirms bond approval or decline.
- **Conveyancer**
Manages transfer once instructed.

3. Back Office Folder Structure

- **Pending** – Signed OTPs awaiting bond approval or cash payment
- **Approved** – Bond approved or cash payment received
- **Declined** – Bond declined

4. Process Steps

Step 1: Submission of Signed OTP

- Agent submits the following to **Bongi**:
 - Signed OTP (buyer and seller)
 - Buyer and Seller FICA documents
 - Proof of deposit (if applicable)
 - Mandate (if applicable)

Bongi actions:



- Scan and check documents for completeness (signatures, initials, dates).
 - Save documents using the standard naming convention.
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Step 2: Principal Review & Signature

- Bongi sends the scanned OTP to **Seelan (Principal)**.
 - Seelan reviews and signs the OTP.
 - Signed OTP is returned to Bongi.
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A. Bond Purchase Process

Step 3A: Upload to Pending Folder

- Bongi uploads the signed OTP pack to:

Back Office → Offers to Purchase → Pending

Status: Pending Finance

Step 4A: Submission to Bond Originator

- Bongi sends the OTP to the **Bond Originator**.
 - Details and date sent are recorded.
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Step 5A: Bond Outcome

If Bond Approved:

- Bond Originator notifies Bongi in writing.
- Bongi:
 - Sends the OTP pack to the **Conveyancer**
 - Uploads bond approval
 - Moves OTP from **Pending** to **Approved**

Back Office → Offers to Purchase → Approved

If Bond Declined:

- Bond Originator notifies Bongi.
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- Bongi:
 - Uploads decline confirmation
 - Moves OTP from **Pending** to **Declined**

Back Office → Offers to Purchase → Declined

B. Cash Purchase Process

Step 3B: Upload to Pending Folder

- After Seelan signs, Bongi uploads the OTP to:

Back Office → Offers to Purchase → Pending

Status: Pending Payment

Step 4B: Conveyancer Instruction

- Bongi emails the signed OTP to the **Conveyancer**.
 - Await proof of payment / confirmation of funds received.
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Step 5B: Payment Received

- Once payment is confirmed:
 - Bongi uploads proof of payment
 - Moves OTP from **Pending** to **Approved**

Back Office → Offers to Purchase → Approved

5. Control Rules

- All OTPs **must first be uploaded to the Pending folder**.
 - OTPs may only be moved to **Approved** when:
 - Bond purchase: Bond approval confirmed
 - Cash purchase: Payment received
 - OTPs are moved to **Declined** only with written bond decline.
 - Folder status must always match the transaction status.
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6. File Naming Convention



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PropertyAddress_BuyerSurname_Status_Date

Example:

12OakStreet_Mokoena_Pending_2026-01-10

12OakStreet_Mokoena_Approved_2026-01-18