Mac’s HVAC Grading Rubric

Create 4 case types:

* Create New Prospect
  + Enter client information including first name, last name, and email address
  + Check if client already exists
  + If client already exists, end the process
  + If client doesn’t exist, fill out a new client form containing their first name, last name, email address, and phone number
* Perform Service Call
  + Enter client email
  + Check if client exists
  + If client exists, load client information and continue to next step
  + If client does not exist, start a ‘Create New Prospect’ case type to create the client
  + Schedule the service appointment (performed by employee)
  + Technician performs service call, addresses issue, enters notes, and call finishes
* Install New System
  + Enter client email
  + Check if client exists
  + If client exists, load client information and continue to next step
  + If client does not exist, start a ‘Create New Prospect’ case type to create the client
  + Employee contacts client to set up consultation including the date and time of the consultation
  + After the consultation is complete, employee can enter notes and a price estimate
  + If client approves, technician performs service and enters any notes and installation finishes
  + If client does not approve, case ends
* Onboard Employee
  + Creates an operator
  + Operator is added to an access group
  + Tracks that training has taken place
* Include validation for the collect information step fields in each case type
* Routing should be to the appropriate users in each case type
* Skin rule should be updated
* (optional) add custom functionality that is interesting or useful

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| Task | Point Value |
| Create new prospect case type created | 1 |
| Collect information step includes first name, last name, and email address | 1 |
| If client exists, end the process | 2 |
| If client doesn’t exist, proceed to new client form | 2 |
| New client form contains first name, last name, email address, and phone number | 2 |
| Case type includes field validation | 1 |
| Steps are routed to appropriate users | 1 |
| Perform service call case type created | 1 |
| Perform service call case type creates ‘create new prospect’ child case if client does not exist | 2 |
| Case type loads client information for performing service call | 3 |
| Technician performs service and can enter notes | 2 |
| Case type includes field validation | 1 |
| Steps are routed to appropriate users | 1 |
| Install new system case type created | 1 |
| Install new system case type creates ‘create new prospect’ child case if client does not exist | 2 |
| Case type loads client information for performing system installation | 3 |
| Employee sets up consultation including date and time | 2 |
| Notes and price estimation are entered by employee | 1 |
| Client can approve or deny price estimation | 1 |
| On approval, technician completes installation and enters any notes | 1 |
| On denial, the case ends | 1 |
| Case type includes field validation | 1 |
| Steps are routed to appropriate users | 1 |
| Employee onboarding case type created | 1 |
| Employee operator is created | 2 |
| Operator has access groups configured | 2 |
| Training session takes place | 1 |
| Skin rule is updated | 2 |
| (Optional) additional features added | 2 |
| Total Possible Score: | 44/42 |

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| Color | Score | Percent |
| Blue | 42-44 | 100 % |
| Green | 35-41 | 81-99% |
| Lime | 28-34 | 65-80% |
| Yellow | 21-27 | 48-64% |
| Orange | 14-20 | 31-47% |
| Red | 0-13 | 0-30% |