Rentista Wire Frame States

Broker/brokerage used interchangeably – sorry for the confusion

Global

* Broker Logo - All pages will have a “Broker Logo” image at the top right corner of the page with the ability to easily upload new broker images for different brokerages.
  + Ideally any picture format will be accepted and with a wide range of sizes
  + Should be able to host multiple instances of application for different brokers using different Broker Logos
    - Note this may not be easily doable in the MVP – should discuss as a larger group
    - Jack – We should discuss how robust this feature should be for the MVP. If we’re dealing with a handful of brokerages, it may be easier to just put together customized schemes for them manually. A fully scalable system might be overkill right now.
* Color Format/Scheme – The color scheme should be customizable for the background, foreground, text, buttons etc.
  + May be more of a Chris item but multiple instances of the application should be able to load a different CSS file (may be off on my logic here but hopefully you get where I’m going)
  + Same issue as above, separate CSS is possible without much effort, but we should probably do it manually for now instead of building that total customization system. I think this point would be a good one to bring up next time we meet in person, especially given that it shouldn’t hold up development in the meantime.
* Browser Compatibility – Compatibility with IE and Chrome (which includes most others) would be a minimum, ideally also on mobile
* The layouts from the wireframes shouldn’t be difficult to make compatible across all 5 major browsers and most mobile ones as well. I think we should shoot for compatibility with Firefox, Opera, Safari, Chrome, IE8/9/10, and iOS for the initial demo. It will likely work on most other mobile browsers at that point.
* Resizing – Views should be flexible and dynamic to the size of the screen/window
* Generally doable without much trouble. Will try to make this a priority when designing the code for the layout.
* Side Panel Label States – A label’s state should not change just because they jump to it. A label should remain in the initial state until they have uploaded or completed partial fields in that form.
  + If a user hits the Back Button on any given page:
    - If the form has been completed, maintain the “completed” state of the label
    - If the form has not been completed, change to the “focus” state
  + If a form has been partially completed, change the state to “partial”
    - Instances where an application has been partially filled out, the upload requires two copies of something but the user has only uploaded one, etc.
* Individual Form/Step Completion – As a user clicks the button that will continue them in the process (not the back button) and they have actually successfully uploaded or completed a page, the side panel form label for that form should turn to a “completed” state and the next page should turn to the “focus” state
  + If a user jumps from one page to a page out of sequence the form that the user jumps to should turn to the “focus” state

All of the above looks speced out well, and will be handled by the PHP/MySQL backend.

* Help Uploading Page – Opens new window with about a ¼ window area as the page it is opening from. For now let the help be a static bulleted list.

1. MVP Process 1 – “Secure” Login Page
   1. Fake login page that will accept any username/password that is input
   2. Attempting to create the façade of security here
   3. We should include a basic user creation system, literally just create user name and password. We’ll need to persistently store user data in order to correctly build the document storage system, and it really won’t take much effort to do. Will also provide the right anchor point in the architecture to build a more robust system for user profiles in the 2.0 version if/when we get there.
2. MVP Process 2 – Welcome Page
   1. Title of Brokerage should appear after “Welcome to “
   2. Short Text Description - Default to pre-established generic wording
      1. Ability to upload customized wording from different brokers
   3. Side Panel –
      1. All steps shown with the Welcome label as “active” (some sort of highlighting)
      2. Other labels should be in their “initial” or not started state when the user is new to the page
         1. If it is a returning user, label states should reflect what has been completed, in-process or not started
      3. Each label should link directly to that form
   4. Clicking the Begin Button should direct the user to the Non-Compete Contract form
3. MVP Process 3 – Non-Compete Contract
   1. Short Text Description at the top should be text that outlines what the non-compete is used for at a high level
   2. Area for contract should allow for a PDF to be uploaded to the form
      1. Area for contract should be independently scrollable (might have contracts that are multiple pages)
   3. Agreement Checkbox – should only be checkable if the user has scrolled to the bottom of the contract
      1. I find this annoying from a user perspective but from a broker perspective I feel it would be beneficial
   4. Next Button at bottom should only be clickable if the checkbox has been selected.
   5. After the user has checked the checkbox and hit the next button the page should jump to the Documentation Upload Information form
4. MVP Process 4 – Documentation Upload Information
   1. Short text description should describe that this gives an overview of the documentation that needs to be uploaded and that further information is detailed in the subsequent pages.
   2. Each of the “upload label” sub-headers on the form should be linked to that form
      1. Each subsection description should be a high level overview of what that document is
   3. Help Uploading – Easily noticeable link should be available at the top of the page, opening up in a new window
   4. Clicking the Next Button the user is directed to the Pay Stubs form
   5. All of the above also looks speced out well

* ***Upload Screens***
  + Example Documentation - contains both text and digital examples of the documentation that the user needs to upload
  + Upload Help Area – Provides a link to the popup Help Uploading form
  + Select File Area
    - Note: May want to include something here to clearly indicate that multiple forms have to be uploaded for a specific step
  + Each Next click brings the user to the step following
  + Allow each document to be “skipped over” if handed in via another form (i.e. fax, hard copy, email etc.)

1. MVP Process 5 – Pay Stub Upload
2. MVP Process 6 – Employment Letter Upload
3. MVP Process 7 – Tax Return
4. MVP Process 8 – Bank Statement Upload
5. MVP Process 9 – Photo ID Upload
6. MVP Process 10 – CPA Upload
7. MVP Process 12 – Application (*Need to discuss MVP functionality*)
   1. Mirror Non Compete form with similar validation in terms of completing the form.
8. MVP Process 13 – Completion

Overall this looks pretty well put together and I would say that the project is ready to start development based off of this info. The only component that I think needs to be fleshed out better is how the broker’s interface will look and exactly how it will interact with the user data. I can tell enough from what we’ve discussed in person and these documents that I can build the user database in a way that it would be easy to work with the broker’s system, but we should spec out exactly what that system will look like when we get a chance.