Application: Fee clerk

Roles and their functionality

Role	Configure Company	Configure Office	Configure Fee Table	Update Users	Accept Fee	Ledger Report			
Super Admin	X	X	X	X	X	X			
Company Admin		X (for their company)	X (for their company)	X (for their company)	X (for their company)	X (for their company)			
Office Manager			X (for their offices)	X (for their offices)	X (for their offices)	X (for their offices)			
Fee Clerk					X	X (for their office)			

User Hierarchy

- SuperAdmin – Can perform all functions. One super admin will be manually creates. Other super admins can be configured by a super admin.
- Company Admin – Can perform all functions for their company. There can be multiple company admins in a company
- Office Manager – Can perform functions for their offices but can not create offices or assign an office manager to offices
- Fee Clerk – Their role is to collect fees for one office

Process:

- Configure Company
    - Super admin creates (or updates or inactivates[1]) companies and may create, update or inactivate company administrators
- Configure Office
    - Within a company there can be multiple offices. This function creates, updates or inactivates them[2]
- Configure Fee Table
    - The fee table is the master list of fees that will be collected in the system. In some cases there will be a fixed fee and in other cases the fee will be variable and entered at the point of sale.

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[1] The system should preserve history, thus we create, update or INACTIVATE system entities as opposed to deleting them. Once an entity is inactivated, it is essentially delated (doesn't show on the GUI, but remains in the database marked as inactive).

[2] Some users will be able to transact for multiple companies and offices. Please display the company and office at the top of the screen and if the user is able to work in multiple companies (only the super admin) or multiple offices (Super Admin, Company Admin or Office Manager) , they will be able to change the company and office via a drop down.

- A fee will generally be added or updated by a company administrator or an office administrator who can work for multiple offices. When a fee is added, please provide a way for the fee to be assigned to all, many or one office. Please default to ALL but give the user the ability to select the offices (from their list of assigned offices)
- Update Users
  - The super admin will be created in the database, whereas all other entities such as companies, offices and users will be created via the GUI
- Login
  - Users will login with a username and password that will be encrypted in the database. Once they login, they will be presented with the menu of functions that are enabled for their role.
- **Accept Fee**
  - This is the main function of the system.
  - The screen should work nicely on a phone, tablet or laptop sized screens (note that other system functions can
  - The user will be able to choose a transaction type
  - If the Fee they choose is a fixed fee, that fee will be set. If not fixed, they will enter the fee.
  - There will be a quantity field (integer) defaulted to 1
  - They may note who they collected the fee from and add notes
  - The screen will display the total amount due[3]
  - Then they will collect the fee and have the ability to "Mark as Collected" or "Cancel"
  - There needs to be a possibility to refund a fee. Please have a "Refund" check box. If checked, the "Mark as Collected" button will change to "Mark as refunded." When the transaction is logged in the database, the refund field will be marked and the amount will be negative
  - The fee will be logged in the database whether it is collected or not. If it is canceled the "collected" flag will not be set, but the office will know that a transaction was logged
  - The system will then offer the ability to print receipt, email receipt or "no receipt"
- Ledger Report
  - This will be a report of the fees collected.
  - Filters:
    - Company (most users will have only one company. Allow multi-select. Default to all)
    - Office (allow multiselect. Default to all)
    - Start Date (default to today minus 30 days)
    - End Data (default to today)
    - Complete / Cancelled (default to Complete. Also offer the options of Canceled and ALL)
    - Collection/Refund (default to Both. Also provide choices of "Collected" and "Refunded"

[3] The GUI should be designed so that they can enter multiple fees and mark them to be collected at once and to give them a "total" for the uncollected transactions on the screen.

- User (default to ALL). Allow multi-select of users.
- Fields to include
  - Company
  - Office
  - Short Date
  - Fee name
  - Unit Price
  - Quantity
  - Amount
  - Received From
  - Notes
  - Collected
  - Refund
  - User
  - Time Stamp (Date and Time)
- Please provide the ability to export to Excel (CSV is fine)

Starting Point ERD:

Here's a starting point ERD for the application.