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# Overview

The purpose of this document is to outline project requirements which will serve as a blueprint for necessary features, functionality and constraints.

# Requirements

#### Data to store:

1. Store organization information
2. Store driver information
3. Store driver availability information
4. Store user information
5. Store client information
6. Store appointment information
7. Store trip information
8. Store message information
9. Store organization audit log information
10. Store system audit log information
11. Store role & permission information
12. Store system configuration information

#### Required actions:

1. Add and update organizations
2. Add, view, and update and deactivate clients
   1. Verify/auto-complete home address
3. Add, view, and update drivers
4. Add, view, update and deactivate users
   1. Assign role
   2. Set permissions
   3. Allow as driver setting
5. Add, view and update appointments
   1. Suggest available drivers
   2. Set appointment status
   3. Verify/auto-complete address destinations
   4. Add/edit trips/destinations (time, mileage, distance(?))
   5. Add/edit appointment notes
   6. Add donation amount
   7. Send secure email/SMS updates
   8. Display custom form elements if defined
6. View organization audit log
7. Ability to add organizations (system admin)
8. Import historical data

#### Views to implement:

Pages are actual pages while form components are able to be placed within pages.

Page

1. [Login](#_81oz6udzff0o)
2. [Appointment schedule](#_k2pl504muv3y)
3. [Clients (search)](#_8xkmxypxpu2y)
4. [Drivers (search)](#_jpjhkartxm1n)
5. [Messages (search)](#_xyzw3rd2n9am)
6. [Reports](#_hiq1hcvcu2f5)
7. [Organization settings](#_jxvkrplua1vn)
   1. [General](#_ufq04x2vctk5)
   2. [Forms](#_vfg4inxn4d3a)
   3. [Users](#_4uu8jpb6i30r)
   4. [Roles](#_v2a0uuu4weuu)
   5. [Audit log](#_gbucadyjces7)
8. [System (system user only)](#_ghy1iy3b8ovo)
9. [Organizations (system user only)](#_kd7vo490kd75)

Form component

1. [Organization](#_r25uh2l6rn1q)
2. [Appointment](#_c0exxhqs2u4)
3. [Client](#_3us9y4wyh37f)
4. [Driver](#_u9rg2kb9tela)
5. [Availability](#_shq31y1pda22)
6. [User](#_nwwx2lokzhzg)
7. [Role](#_vhdqipaxh854)
8. [Message](#_2jf20yne3hqw)
9. [Report configuration](#_kxj0be89sazh)

# Requirement details

### Login

Page Functional Priority 1 (MVP) Mar 24, 2025 9:29 PM

#### Description:

This is the login page to the system.

#### Form fields:

* Username
* Password

#### Actions:

* Sign-in button

### Appointment schedule

Page Functional Priority 1 (MVP) Mar 24, 2025 9:41 PM

#### Description:

This will display appointment details in either a calendar or list format. Quick-glance appointment information will be available in this view and provide navigation to view/edit appointments.

#### Actions:

* Create new appointment button
* View/edit appointment button

### Clients search

Page Functional Priority 1 (MVP) Mar 24, 2025 9:47 PM

#### Description:

Displays a table of clients in an organization. A search bar and filters will be available on this page. Will be able to click on results to view/edit information about a client.

#### Form fields:

* Search
* Filters

#### Actions:

* Search button
* Client selection
* Page number button
* Previous page button
* Next page button

### Drivers search

Page Functional Priority 1 (MVP) Mar 24, 2025 9:53 PM

#### Description:

Display a table of drivers in an organization. A search bar and filters will be available on this page. Will be able to click on results to view/edit information about a driver.

#### Form fields:

* Search
* Filters

#### Actions:

* Search button
* Driver selection
* Page number button
* Previous page button
* Next page button

### Messages search

Page Functional Priority 3 Mar 24, 2025 9:58 PM

#### Description:

Display a table of historical messages sent via email and SMS. A search bar and filters will be available on this page. Will be able to click on results to view message information. This will show quick-glance information including a partial of the message, date and time it was sent and the user that sent it.

#### Form fields:

* Search
* Filters

#### Actions:

* Search button
* Message selection
* Page number button
* Previous page button
* Next page button

### Reports

Page Functional Priority 1 (MVP) Mar 24, 2025 10:04 PM

#### Description:

Display a list of available report configurations to export. A search bar will be available to search through the report configuration names. There will be an add button to add a new report configuration.

#### Form fields:

* Search

#### Actions:

* Search button
* Report export button
* Report ⋮ dropdown button
  + Preview
  + Edit
  + Delete
* Page number button
* Previous page button
* Next page button

### Organization settings

Page Functional Priority 1 (MVP) Mar 25, 2025 12:05 AM

#### Description:

Provide a place to edit organization system settings.

#### Actions:

* Tab selection

### Organization settings: General

Page Functional Priority 1 (MVP) Mar 24, 2025 11:30 PM

#### Description:

Will include general organization system settings.

#### Form fields:

* Organization name
* Organization logo

#### Actions:

* Upload logo button
* Save button
* Delete organization (danger button, only available to the super admin of the organization)

### Organization settings: Forms

Page Functional Priority 1 (MVP) Mar 24, 2025 11:52 PM

#### Description:

Will include a list of forms that allow custom elements. These list items are clickable and will show an example of the form with the current custom elements. Will have a button to allow custom form elements to be added.

#### Form fields:

* Element description
* Element type selection
* Form selection
* (If dropdown)
  + Dropdown values
  + Optional default value
* (If text input)
  + Placeholder
  + Type (text, number, tel, email, etc.)
  + Optional default value

#### Actions:

* Add new form element button
* Element ⋮ dropdown button
  + Edit
  + Delete
* Move element up button
* Move element down button
* Save button

### Organization settings: Users

Page Functional Priority 1 (MVP) Mar 25, 2025 12:05 AM

#### Description:

Will include a table of users along with a search bar. This is where a user's roles and permissions can be added or removed. There is also a button that allows users to be added.

#### Form fields:

* Role dropdown
* (permission) checkbox
* User first name
* User last name
* User email
* User phone
* Notes

#### Actions:

* Add user button
* Save user button
* User ⋮ dropdown button
  + Edit
  + Delete

### Organization settings: Roles

Page Functional Priority 2 Mar 25, 2025 12:11 AM

#### Description:

Lists defined roles. Has a button that allows a user to add a role and define permissions. (Priority 2 because we can define roles initially on the backend)

#### Form fields

* Role name input (unique)
* (permission) checkbox

#### Actions:

* Add role button
* Save button
* Role ⋮ dropdown button
  + Edit
  + Delete

### Organization settings: Audit log

Page Functional Priority 1 (MVP) Mar 25, 2025 12:15 AM

#### Description:

Show audit log of user actions in a table with timestamps.

#### Form fields

* Search
* Filters

#### Actions:

* Search button
* Page number button
* Previous page button
* Next page button

### System

Page Functional Priority 3 Mar 26, 2025 1:51 PM

#### Description:

Provides a place to show system audit information. This will only include system level logs and will not include any organization specific information. This page will only be accessible to system administrators. (Marked as low priority since this information could be output into a log file)

#### Form fields:

* Search
* Filter

#### Actions:

* Search button
* Page number button
* Previous page button
* Next page button

### Organizations

Page Functional Priority 1 (MVP) Mar 26, 2025 1:59 PM

#### Description

Provides an area to view a list of organizations with general information. This will include information like organization name, date/time it was created, etc. This will also have a button that will allow a new organization to be created. This page is only accessible to system administrators.

#### Form fields:

* Search

#### Actions:

* Search button
* Page number button
* Previous page button
* Next page button
* Add organization button

### Organization

Form component Functional Priority 1 (MVP) Mar 26, 2025 2:38 PM

#### Description:

View component for creating an organization. This will only be accessible to system administrators.

#### Form fields:

* Organization name
* Organization logo
* Organization contact information
  + First name
  + Last name
  + Email
  + Phone

#### Actions:

* Create button

### Appointment

Form component Functional Priority 1 (MVP) Mar 26, 2025 2:56 PM

#### Description:

The add/update appoint form view component. This will show when a user attempts to add an appointment or clicks on an existing appointment in the schedule. The driver search will display drivers names with a flag showing if the driver is available for this ride. Drivers who aren’t available should still be searchable.

#### Form fields:

* Date
* Start time
* End time (estimate, can update as real end time after)
* Client (dropdown)
  + (client is selected)
    - Display client notes and information
* Driver (searchable suggestions w/ availability)
* Note
* Destinations
  + Address (autofill suggestions)
  + (if only one destination)
    - Round trip checkbox
* Milage
* Hours
* Distance(?)
* Status dropdown
* (custom form elements)

#### Actions:

* Save appointment button
* Add client button

### Client

Form component Functional Priority 1 (MVP) Mar 26, 2025 3:43 PM

#### Description:

The add/update client form view component. This will show when the user attempts to add or update a client to their organization.

#### Form fields:

* First name
* Last name
* Contact
  + Email
  + Phone
  + Contact preference (dropdown)
* Gender (dropdown)
* Home address (autofill)
* Notes
* Vehicle preference type (dropdown) (this could be a custom form element)
* (custom form elements)

#### Actions:

* Save client button

### Driver

Form component Functional Priority 1 (MVP) Mar 26, 2025 3:48 PM

#### Description:

The add/update driver form view component. This will show when the user attempts to add or update a client to their organization.

#### Form fields:

* First name
* Last name
* Contact
  + Email
  + Phone
  + Contact preference (dropdown)
* Notes
* Vehicle type (dropdown) (this could be a custom form element)
* (availability form view component)
* (custom form elements)

#### Actions:

* Save driver button

### User

Form component Functional Priority 1 (MVP) Mar 26, 2025 3:54 PM

#### Description:

The add/update user form view component. This will show when a user (with permissions) attempts to add or update a user's information.

#### Form fields:

* First name
* Last name
* Contact
  + Email
  + Phone
  + Contact preference (dropdown)
* Allow as driver (checkbox)
  + (if allowed as driver, display:)
    - Vehicle type (dropdown) (this could be a custom form element)
* Notes
* (Permissions checkbox)
* (custom form fields)

#### Actions:

* Save information button

### Role

Form component Functional Priority 1 (MVP) Mar 26, 2025 4:00 PM

#### Description:

The add/update role form view component. This will show when a user (with permissions) attempts to add or update a role and its permissions.

#### Form fields:

* Role name (unique)
* (permissions checkbox)

#### Actions:

* Save role button

### Message

Form component Functional Priority 3 Mar 26, 2025 4:03 PM

#### Description:

The message form view component. This would show when a user goes to send a message to custom recipients.

#### Form fields:

* Recipients
* Subject
* Body

#### Actions:

* Send message button

### Report configuration

Form component Functional Priority 1 (MVP) Mar 26, 2025 4:12 PM

#### Description:

The add/update report configuration form view component. This will show when a user (with permissions) attempts to add or update a report configuration. These configurations will be used to save data export preferences.

#### Form fields:

* Configuration name
* Data fetch type dropdown
  + (if database query) Priority 1 (MVP)
    - Query field
  + (if visual query system) Priority 3
    - Tables
    - Columns
    - Filters

#### Actions

* Save report configuration button

### Availability

Form component Functional Priority 1 (MVP) Mar 26, 2025 4:24 PM

#### Description:

The add/update driver availability form view component. This will show when a user (with permissions) attempts to add or update a driver's availability.

#### Form fields:

* Availability type
  + (If recurring)
    - Week day (dropdown)
    - (Add time blocks) (these time blocks will always define when the driver/user is available)
      * Start time
      * End time
  + (if specific date)
    - Date
    - (Add time blocks)
      * Start time
      * End time
    - Is available (checkbox) (this will overwrite any overlapping recurring driver/user availability)

#### Actions:

* Save availability button