

# Customer Work Management Web Application

v1.1.2

## Update History

### v1.1.1 (1/24/2017):

a. add the following web pages.

1. Page 2-a-m: client accounts (Mobile UI)
2. Page 2-d-m: Document Manager (mobile UI)

b. Modify page Page 2-e: View/Modify client account

### v1.1.2 (3/16/2017)

a. update pages:

1. Page 3-b: Create new work (moved "client contact" field to the top and changed the field name to "client")
2. Page 4-e: View/Modify Invoice (added "send invoice notice" buttons)

<a href="#">Client Accounts</a> (Page 2-a)	<a href="#">Work Book</a> (Page 3-a)	<a href="#">Billing &amp; Payment</a> (Page 4-a)	<a href="#">Marketing</a> (Page 5-a)	<a href="#">Reports</a> (Page 6-a)	User Name ▼
Create Client Account (Page 2-b)	Create New Work (Page 3-b)	Create New Invoice (Page 4-b)	Create Newsletter (Page 5-b)		User Management (Page 1-c)
Notification Manager (Page 2-c)	Work Calendar (Page 3-c)	Invoices (Page 4-c)			Plan and Billing
Document Manager (Page 2-d)	Work Template (Page 3-d)	Payments (Page 4-d)			Log Out

The below web pages are not listed in the menu bar.

View/Modify client account (Page 2-e)	View/Modify work (Page 3-e)	View/Modify invoice (Page 4-e)	User Sign Up (Page 1-a)
			User Log In (Page 1-b)

Sign Up

Sign Up

Username

Text

Password

\*\*\*\*\*

Confirm Password

\*\*\*\*\*

Security Question

Text

Security Question Answer

Text

Enable Two-Factor Authentication Login

☐ No ☐ Yes

Send passcode to

☐ Mobile Phone ☐ Email

First Name

Text

Last Name

Text

Email Address

Text

Mobile Phone Number

xxx-xxx-xxxx

Other Phone Number

xxx-xxx-xxxx

Business Name

Text

Business Type

Law Firm

▼

Business Time Zone

US Pacific Time

▼

Work Email

Text

Business Phone Number

xxx-xxx-xxxx

Business Address

Street

City

State

Zip Code

Country

▼

Business Description

Text

Business Logo

File Path

Upload

CAPTCHA

Sign Up

Go to page 1-b: User Log In

← → ↻ ⬆

Log In

https://www.com

Log In

Username

Text

Password

Text

[Forgot the password?](#)

CAPTCHA

Log In

— — ▶ Go to page 2-a: Client Accounts

[Sign Up](#)

— — ▶ Go to page 1-a: User Sign Up

Create Staff User

https://www.com

Create Staff User

Username

Text

Password

\*\*\*\*\*

Confirm Password

\*\*\*\*\*

Security Question

Text

Security Question Answer

Text

Enable Two-Factor Authentication Login

☐ No

☐ Yes

Send passcode to

☐ Mobile Phone

☐ Email

First Name

Text

Last Name

Text

Email Address

Text

Mobile Phone Number

xxx-xxx-xxxx

Other Phone Number

xxx-xxx-xxxx

Job Title

Text

Department/Division

Billing Department

Work Time Zone

US Pacific Time

Work Email

Text

Office Phone Number

Text

Office Address

Street

City

State

Zip Code

Country

User Note

Text


Personal Photo

File Path

Upload

Add Staff



 search account	Sort Name <span>▼</span>
<div>Acct. #: 000382    Name: James Johnson    <span>^</span></div> <div>Assigned Staff: Staff C Account Status: New Contact: James Johnson Email: James@gmail.com Phone: 222-222-2222</div> <div><div>Work</div><div>Billing</div><div>Notification</div><div>Document</div></div>	
Acct. #: 000385    Name: Maria Karey <span>▼</span>	
Acct. #: 000391    Name: WWW Biz <span>▼</span>	
Acct. #: 000392    Name: Tesla Mark <span>▼</span>	
Acct. #: 000393    Name: Kelly Bush <span>▼</span>	
Acct. #: 000394    Name: Peter Peterson <span>▼</span>	
Acct. #: 000395    Name: Mary Michael <span>▼</span>	
Acct. #: 000396    Name: Waltz Disney <span>▼</span>	



← → ↻ 🏠

https://www.com

Create Client Account

[Client Accounts](#)

[Work Book](#)

[Billing & Payment](#)

[Marketing](#)

[Reports](#)

Create Client Account

Account Type

☒ Personal

First Name

Text

Last Name

Text

☐ Business

Business Name

Text

Account Status

New

▼

Assigned to

Staff A

▼

Contact First Name

Text

Last Name

Text

Email Address

Text

Phone Number

xxx-xxx-xxxx

Mailing Address

Street

City

State

Zip Code

Country

▼

Billing Address

Street

☒ Same as mailing address

City

State

Zip Code

Country

▼

Account notes

Text

Email Group

New client

▼

Notification preference

☒ Email

☒ Phone

☒ SMS

Client portal

☐ Enable

☐ Disable

Send Portal Invitation

Create Client Account

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Create Notification

[illegible]

Document Manager

https://www.com

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[Reports](#)

User Name ▼

🔍 search document

James Johnson ▼

Advanced Search

Add Documents

📁 Q1 report

📁 Q2 report

📁 Q3 report

📁 Q4 report

📁 Annual report

📁 Audit report

📁 folder 1

📄 File ABC

📄 file BCD

📄 file CDE

📄 file ABC

📄 file BCD

📄 file CDE

📁 Q1 report

📁 Q2 report

📁 Q3 report

📁 Q4 report

📁 Q1 report

📁 Q2 report

📁 Q3 report

📁 Q4 report

Share on client portal

Remove from client portal

Email client

View

Edit

Delete

Share on client portal

Remove from client portal

Email client

View

Edit

Delete

Share on client portal

Remove from client portal

Email client

View

Edit

Delete

Share on client portal

Remove from client portal

Email client

View

Edit

Delete

Share on client portal

Remove from client portal

Email client

View

Edit

Delete

Share on client portal

Remove from client portal

Email client

View

Edit

Delete

Share on client portal

Remove from client portal

Email client

View

Edit

Delete

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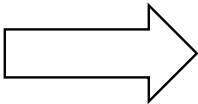
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James Johnson

search document

Folder: Q1 report 2016	v
Folder: Q2 report 2016	v
Folder: Q3 report 2016	v
Folder: Q4 report 2016	v
Folder: Annual report 2016	v
Folder: Audit report 2016	^
<div><div></div>folder 1</div> <div><div></div>folder 2</div> <div><div></div>folder 3</div>	
Folder: Q1 report 2017	v
Folder: Q2 report 2017	v
Folder: Q3 report 2017	v
Folder: Q4 report 2017	v
Folder: Annual report 2017	
Folder: Audit report 2017	



Back

search document

Folder: folder 1

^

File ABC

Share

Email

View

File DEF

Share

Email

View

File GHI

Share

Email

View

File HIL

Share

Email

View

Folder: folder 2

v

Folder: folder 3

v

← → ↺ ↻

https://www.com

View/Modify Client Account

[Client Accounts](#)

[Work Book](#)

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[Reports](#)

User Name▼

Account Number: 000391

Account Type: Business

🔍 search account

[Advanced Search](#)

Account Information

Work Book

Work Calendar

Notification

Documents

Invoice & Payment

Business Name

WWW Biz

Account Status

Active▼

Assigned to

Staff D▼

Contact First Name

Wayne

Last Name

Walker

Email Address

W.W@www.biz

Phone Number

333-333-3333

Mailing Address

ABC road

DEF city

CA

10001

US▼

Billing Address

ABC road

☒ Same as mailing address

DEF city

CA

10001

US▼

Account notes

This client contacted us on .....

Notification preference

☒ Email

☒ Phone

☒ SMS

Client portal

☐ Enable

☐ Disable

Send Portal Invitation

Save Changes

Archive this Client

Delete this Client

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## Reports

Use Work Template

--	---

Text
------

New 

Assign to me 

12/12/2016

Never End

☒ Repeat Every 3 months ☐

hh:mm

hh:mm

2 hours

office 


Text
------


File Path

Name	Upload Date
Doc 123.docx	6/8/2016
Doc 456.pdf	6/8/2016
Doc ABC.pdf	6/20/2016

☐ Yes      ☐ No

\$200/hour

Unpaid 

☒ Notify Client Contact    Reminder    1 day    ▼    ☒ Email    ☒ Phone    ☒ SMS☒ Notify Staff Assignee    Reminder    1 day        ☒ Email    ☐ Phone    ☐ SMS

Text

### Create and Send Invoice

← → ↻ 🏠

https://www.com

Work Calendar

[Client Accounts](#)

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Happy User ▼

Create New Work

🔍 search activity

show by client ▼

show by staff

show by client

James Johnson ▼

Time	Sunday	Tuesday	Wednesday	Thursday	Friday	Saturday
7:00am	-					
8:00am	-	Consultation				
9:00am	-		Meeting		Read Doc	
10:00am	-	Read Doc	Consultation	Meeting		
11:00am	-		Write Report		Meeting	
12:00pm	-		Write Report		Meeting	
1:00pm	-		Write Report		Meeting	
2:00pm	-		Write Report		Meeting	
3:00pm	-		Write Report		Meeting	
4:00pm	-		Write Report		Meeting	
5:00pm	-		Write Report		Meeting	
6:00pm	-		Write Report		Meeting	
7:00pm	-		Write Report		Meeting	
8:00pm	-		Write Report		Meeting	
9:00pm	-		Write Report		Meeting	

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Create Work Template

---

**Work #1**

Work

Consulation

Staff Assignee

Myself ▼

Duration

1 hour ▼

Location

Office

Work Description

Text

Work Documents

File Path

Upload

Name	Upload Date
Doc 123.docx	6/8/2016
Doc 456.pdf	6/8/2016
Doc ABC.pdf	6/20/2016

Billable

☐ Yes ☐ No

Billing Rate

\$200/hour ▼

☒ Create Invoice

Automatic Reminder

☒ Notify Client Contact

Reminder

1 day ▼

☒ Email ☒ Phone ☒ SMS

☒ Notify Staff Assignee

Reminder

1 day ▼

☒ Email ☐ Phone ☐ SMS

Reminder Message

Text

Clear

Add More Work

Finish and Save Template

↓

When clicked, the page will extend to show the "Work #2" section, so on and on.

← → ↻ ↗
View/Modify New Work

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View/Modify Work

---

Work ID: 000539

Work

Meeting

Status

New ▼

Staff Assignee

Attorney ▼

Date

06/10/2016

☒ Repeat
 

Every 3 months

▼

End Date

Never End

Time

3pm

Duration

1 hour ▼

Location

Office

Client Contact

James Johnson ▼

Work Description

Talk about .....

---

Work Documents

File Path

Upload

Name	Upload Date
Doc 123.docx	6/8/2016
Doc 456.pdf	6/8/2016
Doc ABC.pdf	6/20/2016

---

Billable

☐ Yes
 ☐ No

Billing Rate

\$200/hour ▼

Invoice Status

Unpaid ▼

Invoice Number: 000387

---

Automatic Reminder

☒ Notify Client Contact
 

Reminder

1 day ▼

☒ Email
 ☒ Phone
 ☒ SMS

☒ Notify Staff Assignee

Reminder

1 day ▼

☒ Email
 ☐ Phone
 ☐ SMS

Reminder Message

Text

---

Update Work Activity

Delete

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Create Invoice

111

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Create Invoice

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User Name ▼

---

Create New Invoice

Invoice Date  

Client  ▼

Invoice Date: 11/11/2016

Bill to:  
James Johnson  
123 Abc street,  
Good City, CA 90001

Work Number	Description	Date & Time	Duration	Rate	Subtotal	Work Status	Edit
000826	Consultation	5/28/2016 10:15AM	1 hour	\$100/hour	\$100	Completed	<button>Remove</button>
000823	Review 30 page document	6/8/2016 11:30AM	1.5 hours	\$200/hour	\$300	Completed	<button>Remove</button>
000809	Meeting Attorney	6/10/2016 03:00PM	1 hour	\$200/hour	\$200	Scheduled	<button>Remove</button>
							<button>Add Work</button>
3 works				Total	\$600		

Manual Edit

Save

Save and Send

Cancel

---

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▼

search invoice

Search by Client

▼

James Johnson

▼

Advanced Search

Create Invoice

[illegible]



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User Name ▼

---

View/Modify Invoice

Invoice Number: 000394

Invoice Date: 11/11/2016

Bill to:  
James Johnson  
123 Abc street,  
Good City, CA 90001

Work Number	Description	Date & Time	Duration	Rate	Subtotal	Work Status	Edit
000826	Consultation	5/28/2016 10:15AM	1 hour	\$100/hour	\$100	Completed	<button>Remove</button>
000823	Review 30 page document	6/8/2016 11:30AM	1.5 hours	\$200/hour	\$300	Completed	<button>Remove</button>
000809	Meeting Attorney	6/10/2016 03:00PM	1 hour	\$200/hour	\$200	Scheduled	<button>Remove</button>
							<button>Add Work</button>
3 works				Total	\$600		

Send 1st noticeSend 2nd noticeSend final notice

EditSaveDelete

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User Name

Create Newsletter/Group Notification

[illegible]

## Terms of Service







