Description

We need to add another flag/checkbox to the Directory data/management form in the Web Admin Portal that will hide the directory from ALL mobile app access, including hiding from search results (or geolocation results) in the Locations Selection mobile app page AND also disabling direct links via branch.io, or mobile web. This flag should be editable ONLY by MarComet Web Admin Portal user roles, and NOT editable by location admin users. (Note - this flag could be oriented as a "positive" flag, i.e. flag as "active", and make it on/yes/true by default.)

The intent for use is that when the system is live, if a hotel has not paid their bill, we need to be able to disable the mobile presentation of their Directory entirely. This includes both finding it on the locations selections page, as well as direct access via branch.io, or direct access via mobile web url.

This new flag, and other new credit and account management related fields, should be put on a new form in the Web Admin Portal that is launched by a new top level button added to the Directory top level, name the button "Account Management". This Account Management button should only be viewable by MarComet Web Admin Portal users, and NOT viewable/accessible by location admin users.

We also need to add a couple of other fields for credit and account management to this new restricted-access Directory data/management form:

- "Directory ID" - should display (non-editable) the system ID of the directory

- "Directory Name" - should display (non-editable) the Name of the directory

- "Source Template ID" - should display (non-editable) the system ID of the directory's source template

- "Source Template Name" - should display (non-editable) the Name of the template

- "Directory Creation Date" - should display (non-editable) the date the directory record was created, in U.S. date format MM/DD/YYYY

- "Directory Last Modified Date" - should display (non-editable) the date the directory record was last modified, in U.S. date format MM/DD/YYYY

- "Billing Cycle" - (editable), should be a text value, with picklist (choices = Monthly, Quarterly, Annual)

- "Billing Rate" - (editable), should be a U.S. currency value, with two decimal places

- "Payments System ID" - (editable), should manage an alphanumeric value, max 50 characters. (this date may be referenced in future automated account management features, but only manually for now, to cross reference to a third-party payments management system)

- "Account Paid Through Date" - (editable), should manage a date value, in U.S. date format MM/DD/YYYY (this date will be referenced in future automated account management features, but only manually for now)

- "Active Account" checkbox - (editable, as described above), default to checked (on/yes/true)

- "Payment Contact" - should be a large memo field for account management to detail payment contact information, including names, phone numbers, addresses, etc.

- "Notes" - (editable), should be a large memo field for account management related notes to be entered

Carl S. Ackerman

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Related issues

[#1](https://marcomet.plan.io/issues/240#note-1)https://secure.gravatar.com/avatar/d0baf417fe05fb9afb647a71360c5496?rating=PG&size=24&default=blankUpdated by [Carl Ackerman](https://marcomet.plan.io/users/3) [3 months](https://marcomet.plan.io/projects/egsd-mobile-app/activity?from=2016-11-16) ago

* Assignee set to Narsimha Gondi

[#2](https://marcomet.plan.io/issues/240#note-2)https://secure.gravatar.com/avatar/b41c64ab8533b5aea1042bc79e9e4b2d?rating=PG&size=24&default=blankUpdated by [Narsimha Gondi](https://marcomet.plan.io/users/28) [2 months](https://marcomet.plan.io/projects/egsd-mobile-app/activity?from=2016-11-28) ago

* Status changed from Open to Awaiting Approval
* Assignee changed from Narsimha Gondi to Carl Ackerman

[#3](https://marcomet.plan.io/issues/240#note-3)https://secure.gravatar.com/avatar/d0baf417fe05fb9afb647a71360c5496?rating=PG&size=24&default=blankUpdated by [Carl Ackerman](https://marcomet.plan.io/users/3) [2 months](https://marcomet.plan.io/projects/egsd-mobile-app/activity?from=2016-11-28) ago

* Status changed from Awaiting Approval to Ready for Dev
* Assignee changed from Carl Ackerman to Narsimha Gondi

[Quote](https://marcomet.plan.io/issues/240/quoted?journal_id=657) [Edit](https://marcomet.plan.io/issues/240)

Need time estimate to approve work (since you already told me it would take more than 2 hours).

[#4](https://marcomet.plan.io/issues/240#note-4)https://secure.gravatar.com/avatar/b41c64ab8533b5aea1042bc79e9e4b2d?rating=PG&size=24&default=blankUpdated by [Narsimha Gondi](https://marcomet.plan.io/users/28) [2 months](https://marcomet.plan.io/projects/egsd-mobile-app/activity?from=2016-11-28) ago

* Estimated time set to 5:00 h

[#5](https://marcomet.plan.io/issues/240#note-5)https://secure.gravatar.com/avatar/b41c64ab8533b5aea1042bc79e9e4b2d?rating=PG&size=24&default=blankUpdated by [Narsimha Gondi](https://marcomet.plan.io/users/28) [2 months](https://marcomet.plan.io/projects/egsd-mobile-app/activity?from=2016-11-28) ago

* Status changed from Ready for Dev to Awaiting Approval
* Assignee changed from Narsimha Gondi to Carl Ackerman

[#6](https://marcomet.plan.io/issues/240#note-6)https://secure.gravatar.com/avatar/d0baf417fe05fb9afb647a71360c5496?rating=PG&size=24&default=blankUpdated by [Carl Ackerman](https://marcomet.plan.io/users/3) [2 months](https://marcomet.plan.io/projects/egsd-mobile-app/activity?from=2016-11-28) ago

* Status changed from Awaiting Approval to Ready for Dev
* Assignee changed from Carl Ackerman to Narsimha Gondi

[Quote](https://marcomet.plan.io/issues/240/quoted?journal_id=660) [Edit](https://marcomet.plan.io/issues/240)

Approved for Development Work

[9:55:59 AM] Carl Ackerman: Consider the existing show/hide flag that we have for the directory. This is a second show/hide flag that works a little differently.  
[9:59:57 AM] Carl Ackerman: The currently existing show/hide flag is designed to enable a "for design only" stage while creating a directory, by allowing any directory administrator to prevent the directory from showing up in a location search (as a customer might accidentally find it) but still allow it to show up with a direct link (branch.io link, etc.) so that it can be accessed while it is in the design stage.  
[10:01:58 AM] Carl Ackerman: The new flag is designed to turn off a directory for a non-paying customer, so it will disable the access entirely, via the direct links (branch.io, etc.) as well as exclude from location search.  
[10:02:29 AM] Carl Ackerman: This new flag should NOT be accessible by the directory admin, only customer service admin and above.  
[10:02:48 AM] G Narasimha: got it  
[10:02:55 AM | Edited 10:04:32 AM] G Narasimha: thanks  
[10:04:50 AM] Carl Ackerman: We might need a message to present when a disabled directory is accessed directly - like a substitute page, that says "Directory Currently Inactive - Please Contact Customer Service"   
[10:05:07 AM] G Narasimha: ok  
[10:08:10 AM] Carl Ackerman: I am not sure if any access restrictions would need to be imposed on the admin portal side, so we won't worry about that for now. So, for example, if a directory is inactivated, it can still be edited, just not viewed in mobile presentation form (you'd get the "Directory Currently Inactive" page)  
[10:08:35 AM] G Narasimha: yes

[10:47:10 AM] Carl Ackerman: payments will still all be handled off-line, by our customer service staff. If a customer has not paid, for now they would manually go into the system and uncheck this new "active" flag.  
[10:47:46 AM] G Narasimha: ok  
[10:50:13 AM] G Narasimha: can u check it once just now i modified  
[10:51:52 AM] Carl Ackerman: ok. this estimate includes the things we discussed now on Skype? (i.e. "Directory Inactive" mobile page?)  
[10:52:14 AM] G Narasimha: yes  
[10:54:06 AM] Carl Ackerman: ok great. I will approve it. If at any time you think that you will need more than the estimated time to complete the ticket, then you should send it back to me for approval. Of course, if it takes you less time, that is fine.

[#7](https://marcomet.plan.io/issues/240#note-7)https://secure.gravatar.com/avatar/b41c64ab8533b5aea1042bc79e9e4b2d?rating=PG&size=24&default=blankUpdated by [Narsimha Gondi](https://marcomet.plan.io/users/28) [2 months](https://marcomet.plan.io/projects/egsd-mobile-app/activity?from=2016-11-30) ago

* File [240.png](https://marcomet.plan.io/attachments/download/366/240.png) [View](https://marcomet.plan.io/attachments/366/240.png) added
* Assignee changed from Narsimha Gondi to Carl Ackerman

[Quote](https://marcomet.plan.io/issues/240/quoted?journal_id=664) [Edit](https://marcomet.plan.io/issues/240)

Login Credentials :  
---------------------------------  
username : itadmin  
password : itadmin

I created a hotel directory ( 11-30-2016 ) from the source template like WHG - Wingate (Carl 2016-08-23 B).  
I can provided all the editable and non-editable field as you mentioned for Account Management. These capability is available for only high-level admins like CS Admin, Super Admin and IT Admin. Not for Location Admin or Hotel Admin.

In Mobile App if the new flag variable is false it will redirect to Directory Currently Inactive page with corresponding message otherwise it will redirect to corresponding hotel.

[#8](https://marcomet.plan.io/issues/240#note-8)https://secure.gravatar.com/avatar/b41c64ab8533b5aea1042bc79e9e4b2d?rating=PG&size=24&default=blankUpdated by [Narsimha Gondi](https://marcomet.plan.io/users/28) [2 months](https://marcomet.plan.io/projects/egsd-mobile-app/activity?from=2016-11-30) ago

* File [240(1).png](https://marcomet.plan.io/attachments/download/367/240(1).png) [View](https://marcomet.plan.io/attachments/367/240(1).png) added

[#9](https://marcomet.plan.io/issues/240#note-9)https://secure.gravatar.com/avatar/d0baf417fe05fb9afb647a71360c5496?rating=PG&size=24&default=blankUpdated by [Carl Ackerman](https://marcomet.plan.io/users/3) [2 months](https://marcomet.plan.io/projects/egsd-mobile-app/activity?from=2016-11-30) ago

* Status changed from Ready for Dev to In Development
* Assignee changed from Carl Ackerman to Narsimha Gondi

[Quote](https://marcomet.plan.io/issues/240/quoted?journal_id=666) [Edit](https://marcomet.plan.io/issues/240)

Per Ticket:  
This new flag, and other new credit and account management related fields, should be put on a new form in the Web Admin Portal that is launched by a new top level button added to the Directory top level, name the button "Account Management". This Account Management button should only be viewable by MarComet Web Admin Portal users, and NOT viewable/accessible by location admin users.

- Instead this was done as another tab the edit directory.  
- Agreed Narasimha will move to new popup form.

- Grey fields are hard to read

- Size limit messaging belongs only on pages with image upload, at bottom display is ok

- Display in Location Search checkbox only belongs on Hotel Details tab

- In a field label, for alignment, in general keep it left-aligned. It seems like you have it as justified which looks strange when the field word wraps.

- Billing Rate field needs to be formatted/restricted to 2 decimal place value (for U.S. currency)

- Account Paid Through Date field needs to be formatted/restricted to date value/format MM/DD/YYYY.

- Payment Contact field needs to be a large text box, and needs to accept line breaks (not a one line presentation)

- Notes field needs to be an even larger text box, and needs to accept line breaks (not a one line presentation)