

Stone Signs On-line Form Points to Note

AGENTS VIEW

1. Enable secure login for Estate Agents on a per Branch basis. E.g. michaeljones@goring.
2. Login in 1. above linked to office email for the purpose of password resetting.
3. If form is submitted with mandatory fields missing, do not process but retain field data. Display message: "Mandatory fields are missing" with OK button to acknowledge.
4. If form is submitted successfully, display message: "Form submitted to Stone Signs", with OK button to acknowledge.
5. Allow Agent to amend or cancel sign request in the event of error, may need time limit on this...?
6. For sign options: **Change, Remove or Re-erect**, show drop-down list of placed signs based on Branch.
7. If **Remove** option is selected, ensure address for this site cannot be requested again, i.e. prevent duplicated request for removal.
8. However if Remove request is then cancelled by Agent, ensure address it put back in play.
9. Display pending and placed signs in a map view for all Branches on a per Estate Agent basis. Each Branch to be displayed in a different colour. Faded pin drop shows sign placement pending. No. of Branches may exceed six.
10. When map view opens, encompass all pending and placed signs in the view.
11. Allow map view to be filtered by Branch.
12. Group sign requests in the following tables:
 - Sign Requests Made; Pending Placement (n)
 - Signs Placed (n)
 - Signs unsuccessful (n)
13. Agent view must be mobile compatible.

BEN'S DASHBOARD

1. Secure login required for Ben's Dashboard.
2. Ben's Dashboard to display all sign requests made from all Estate Agents and Branches.
3. Dashboard to include fields from the on-line form in a table format for easy use on mobile or tablet. Also include:
 - Status.
 - Sign request date/time stamp.
 - Sign Placed date/time stamp.
4. Six main Status areas to be displayed on separate pages:
 - a. Signs requests; awaiting placement.
 - b. Signs placed; awaiting invoicing.
 - c. Signs unsuccessful; awaiting invoicing.
 - d. Signs invoiced; awaiting payment. – group as per invoice ref.
 - e. Signs invoiced; payment late.
 - f. Signs paid.
5. Sign request area to allow filter by postcode so that working areas can be grouped. Postcode groups to be provided by Hannah. Areas are:

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- Worthing
- Shoreham to Seaford
- Ferring to Selsey

6. Sign request area to have Placed/Unsuccessful buttons plus confirmation message:

- Sign Placed Confirm: *Sign Placed Y/N*
- Sign unsuccessful Confirm: *Mark as unsuccessful Y/N*

7. Ben's Dashboard to also have facility to make sign requests on behalf of all Estate Agents in the event of re-erected signs and ad hoc on-site work carried out.