Notifications development, separate service

* Liaise over new server, deployment (china)
  + **Days**
  + Integrate with new notifications (me)
    - Simple messages
    - Html messages
    - Video looked at notification
    - Message for record owner and all other with different priority
      * **5 days**
      * **10-40 days**

Documentation,

* refactor,
* Self-documenting code where possible
  + 40 days,

Country Specific

* Add specific payment providers if required
* Addition of New countries
* Adding Translation
* Check – could be Country Amendments allow extra for this i.e 1-2 days
* Possible Customer report in correct format
  + **3 – 4 days**

Phase 1, end of August Launch. – dashboard may roll over

* Cube, Colin to check all data is accurate. And specify data changes (china)
  + Liaise over new server, deployment
    - **2 days**
    - **20-40days**
* Marketing / Signup,
  + Colin to provide content,
  + separate Db
  + registering workshop intent,
  + group intent
  + email sent to country sponsor for authorisation
    - **1 days**
    - **10 days**
* Video App
  + by pass grid
  + return to evhc record
* Payments (Simple).
  + Manual workshop setup based on email back from country sponsor. Free trial handled by user not knowing password
  + Email a payment page to workshop
  + Payment made by workshop
  + On success user emailed with reset password granting access
  + Changes handled through shelling out to payment website from evhc authenticating through domain cookie
  + Group Level
  + Cancelations
  + Integrate payment system with evhc
  + New url and certificate
    - **5 days**
    - **50 days**
* Colin Fixes
  + **3 Days**
* Setup Wizard (include re developing templates screens),
  + **50 days**
* Help Tour (Templates, Connect, EVHC
  + upgrade advisor, deferred, history, bookedin - components - requirejs
  + upgrade labour - razor view engine
  + upgrade parts - razor view engine
  + upgrade template – razor view engine
  + connect – razor view engine (only rolling out EVHC CONNECT)),
    - **60 days**
* Basic User Dashboards, can carry over not all essential for launch.
  + i.e notification download.
  + Setup wizard
  + **30 days**
* Country / Global Level Reports Automated reports
  + Reports unknown
    - **7 days**
* Password changes
  + Password format, Only new users
  + Remove lockout
  + Email forgotten passwords from login page
    - **5 days**
* Ftp Uploads. Basic help text - included
* Excel Uploads basic help text – included
  + Excel upload / ftp upload map to headers etc
    - **15 Days**
* Change Castrol head office address on legal popups

Phase 2,

* Automation Workshop and Payment Setup (templates. Lost reasons, connect etc),
  + 60 **days**
* Dashboard Improvements
  + Alerts etc.
    - 20 **days**
* Migrate data services
  + **5 days**
* Move images and log files
  + **1 days**
* Reporting
  + Cube last refresh time / next refresh time
    - **1 days**
* Password changes
  + Convert old users
    - **3 Days**
* Recommendations (Consultant Input)
  + allow 20 **days**,
* Optimisation – ef
  + improve evhc,
  + leave admin as not used as frequently ongoing
    - 20 **days**
* Optimisation base on uptake and growth
  + New rellek analysis
  + unknown

Phase 3,

* Improve Deferred Work Process
* Beta environment for all projects
  + Automated deployment to production
* Separate geographically located date centres
* Reporting
  + Check all reports coming of cube. Rewrite if not. Cannot be done until cube completed.
* Archiving Strategy.
* Review Admin Optimisation ef

Misc.

* New feature Help
  + Introduce a new feature but don’t need full tour help
* Updates to tour based on new features
* Documentation on going
* Analysis / Scalability on going
* review phases 1 – 3 suggest improvements updates based on market / user feedback

New Features

* Automated Reporting,
  + Not including reports (do we make all current reports email able, separate reporting project.
  + Country
  + Groups
  + Dealers
    - 30 **days**

Money Back.

27500 owed

250 + 3500 to be paid

23,750 remaining

Approx 68 days

Colin’s fixes

* **Tabbing of tyres, need to know exactly what the problem is.**
* **Delete EVHCS load data a scrolling down grid**
* HTML Page seems slow to load and vide could do with spinner if loading to show something is coming
* Check HTML Report tyre space saver options removed as all currently show (Also check it removes MOT etc. if disabled)
* Video Authorisation screen doesn’t allow you to close with bottom button on tablet as its below screen
* Format Castrol screens
* Format Report Buttons at the top of all reports
* Benchmark trend report dates year on year analysis not working, categoryTrackingreport
* DealerePerformanceReport, advisor globalization p4
* Advisor Selection on Input Screen
* Viewed videos order latest viewed first
* **View HTML Report in History so video can be seen**
* **Video keep 90 days**
* **Video Alert on Notifications**
* Castrol/Consultant permissions can’t view videos?
* Check Globalisation on Alerts for Validation on Live Site is currently Swedish (was pre update)
* Changes made for IE8 etc. on beta won’t cause issue when uploaded?
* **Just had good feedback from Snows Techs, Include Spare Tyre 3 options on Nav bar as they love the nav bar and use it all the time but the spare tyre options means they have to view down the page when on all green job**
* **Whats App copy data**

signup

intent logged in db

email entered twice

email sent to china

china accepts send email back

workshop created / user created manually, guid

ener the guid into ourment system emil sent back to user from payment system with link to payment page

ask question about payment mechanism

go cardless

paypal

worldpay

payment made

on success give

thank you for your payment, we have emailed you your login details please check your inbox to start using our system

using guid, lookup workshop in evhc

send out email to all registered users using password reset procedure

Marketing front end

* Sign up
  + - Phase 1
      * Capture workshop data, which gets sent to relevant Castrol people
      * Info reviewed by country
      * If accepted we are notified
      * Workshop setup completed by us
      * Workshop notified on completion of setup, **payment is now required**
      * **Email sent out with link to payment option page**
    - **Phase 2 / 3**
      * **Worksop setup also sets up details and workshop is automatically created using entered data**
  + **Content to be decided**

Payment

* Phase 1, simple forms / buttons for capturing
  + sepa,
  + paypal
  + details colin to manage once info has been emailed through
  + etc
* Phase 2 / 3

Automate payment procedures and invoice

Setup – phase 1 manualy entered, phase 2 automated before workshop is turned on

* EVHC
  + system defaults
    - lost reasons
    - deleted reasons
    - templates
* connect
  + system defaults
    - connect templates
    - Schema?

Main System

* phase 1
  + setup wizard - what to include?
* EVHC
  + new user
  + lost reasons
  + deleted reasons
  + templates
* Connect
  + templates
* Help tour – what to include
* EVHC
* Templates
* Connect
  + EVHC
  + upgrade advisor - components - requirejs
  + upgrade labour - razor view engine
  + upgrade parts - razor view engine
  + upgrade template – razor view engine
  + connect – razor view engine (only rolling out EVHC CONNECT)
* Connect
  + Creating template
  + Sending

Phase 1/2/3

* dashboard what to include
* Links to Defaults
* Recommendations engine (consultant input / cube)
* Help / links for common issues
* Feature compatibility check informing user of features that won’t work / advising to upgrade browser

General

* Phase 1
  + login password changes
    - forgotten password – require email
    - user locked out, remove
    - Password expiry?
    - Password length?
  + needs investigation later proposal whats app / connect integration (copies link)
* Phase 2/3
  + Needs investigation later proposal deferred process
  + SMS Charging for lager franchise
* upgrade to ef –
  + - evhc
    - admin
    - connect
    - analysis of aggregated values - speed increase - linq to sql currently loads subitems and categories line by line n+1

Reporting

All report from cube

Country reports

Automated Reports

Phase 2

We can send out automated reports and modify distribution list via form

Phase 3

All workshops can opt in to individual automated reports

Analysis of scalability phase 2/3

* Based on new relic
* SQL Profiler

New countries

Translation

payment schedule / po - this and maintenance