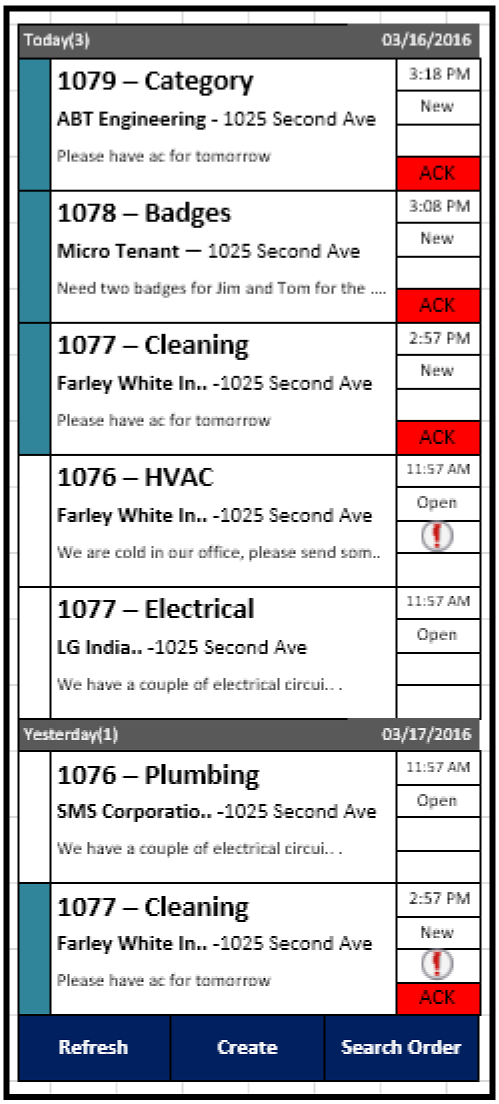
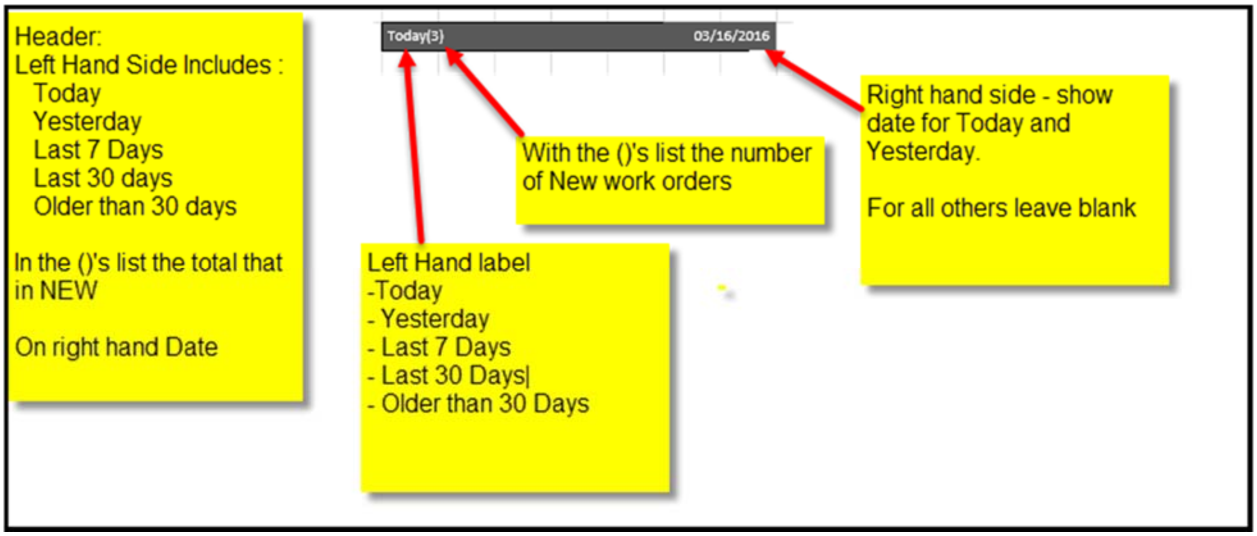
Modify the Phone App

Problem ID	1084
Issue	Modify the main page
Priority	1
Module	
Issue Type	Add new Functionality to existing Module
User Name	
Description:	Change the main Page See Below for reference



1 Date Header

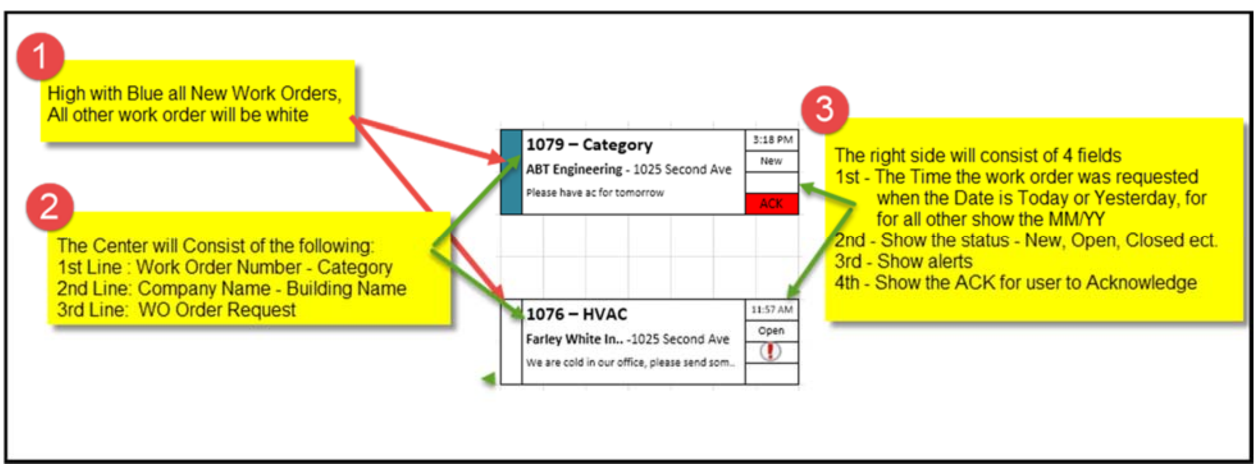


Date Header will include 3 Parts

1.1 Left Hand Side of header will include the following:
- 1.1.1 Today
- 1.1.2 Yesterday
- 1.1.3 Last 7 Days
- 1.1.4 Last 30 Days
- 1.1.5 Older than 30 Days

1.2 Left Hand side within the ()'s
- 1.2.1 List the number of New Work Orders, if zero are open then display (0)

1.3 Right hand side Display Date
- 1.3.1 The date will display for only Today and Yesterday menu. All other menu's will be left blank



2 Main Body consists of three Parts

2.1 Left Indication color indicator of New work order
- 2.1.1 Highlight the left side with a bright blue color to let the user know that the work order status is New, change to white when the status is other than New.

2.2 Center Information

2.2.1 The first line with be Bold with a large font (16pt)

2.2.1.1 The Line will display the Work Order Number and Category Name

2.2.2 The Second line will also be bold with a smaller font (14pt)

2.2.2.1 The line will display the Tenant Name and the Building Name

2.2.3 The third line will not be bold with a small font (12pt)

2.2.3.1 The line will display the Work Order Request

2.3 Right Side Information will consist of 4 fields

2.3.1 1st (Top Field) will display either the Time of the work order request or the date of the work order.

2.3.1.1 If the Date header is Today or Yesterday, Display the Time

2.3.1.2 If the Date header is Last 7 Days or older then display the MM/YY

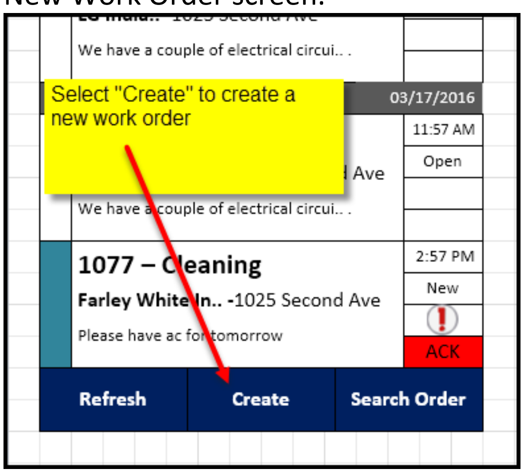
2.3.2 2ND (from the top) display the current status of the work order

2.3.3 3rd (From the top) display any alert notifications

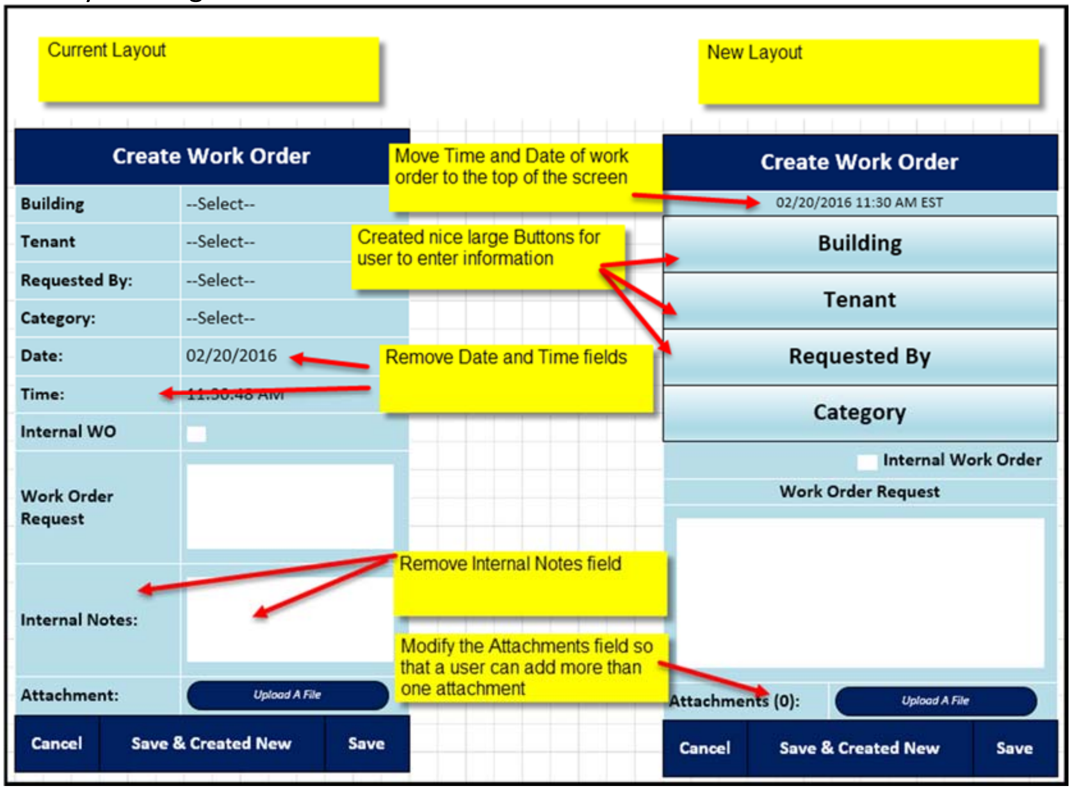
2.3.4 4th (From the top) If work order is New display the "ACK" button for user to open the work order.

3 Create a New Work Order

3.1 When a user selects "Create", a new windows will open showing the "Create New Work Order screen.



3.2 Modify existing "Create Work Order" screen.



3.3 Move the Date and Time fields to the top of the screen and reduce the font.

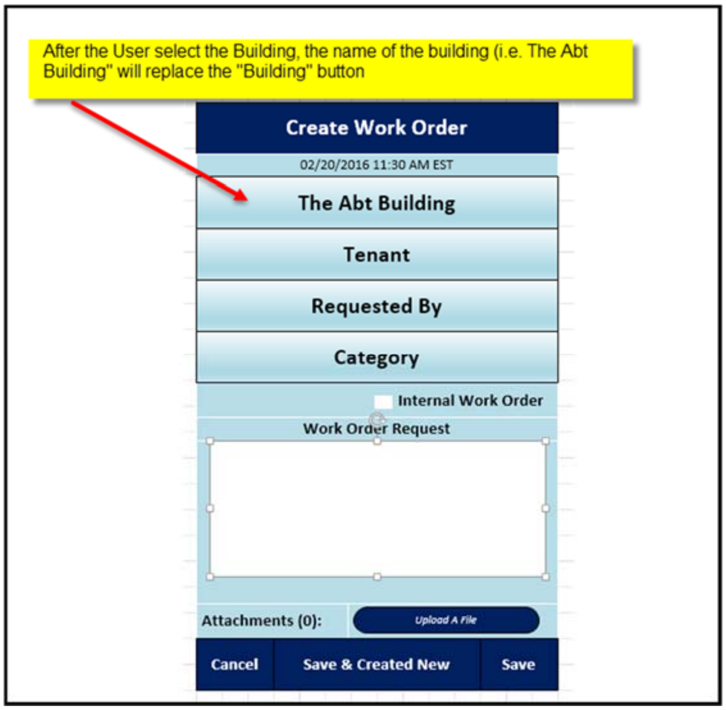
3.4 Change the way the buttons are setup, Create large buttons for Building, Tenant, Requested By and Category.

3.5 Remove the Internal Notes field, we do not need this ability within the app.

3.6 **Enter Building,**

When the User selects the "Building" button, a list of all the buildings the user has access to will be displayed:

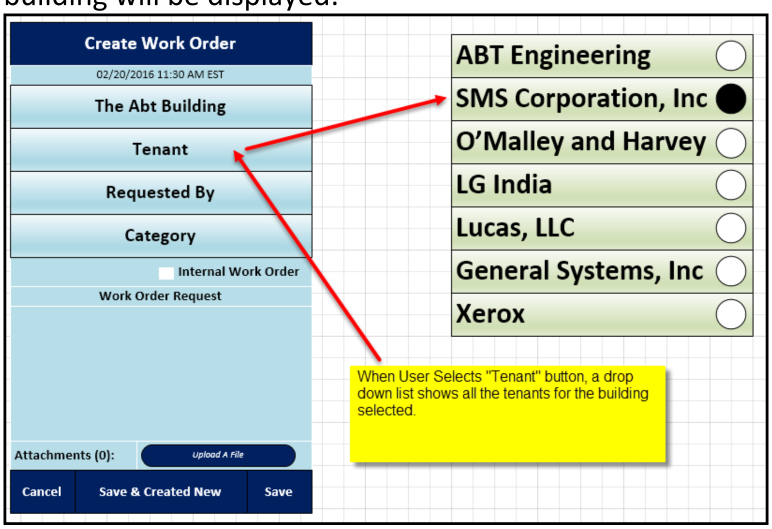
3.7 Once the User selects a building, the "Building" menu will change to the building name (i.e. The Abt Building).



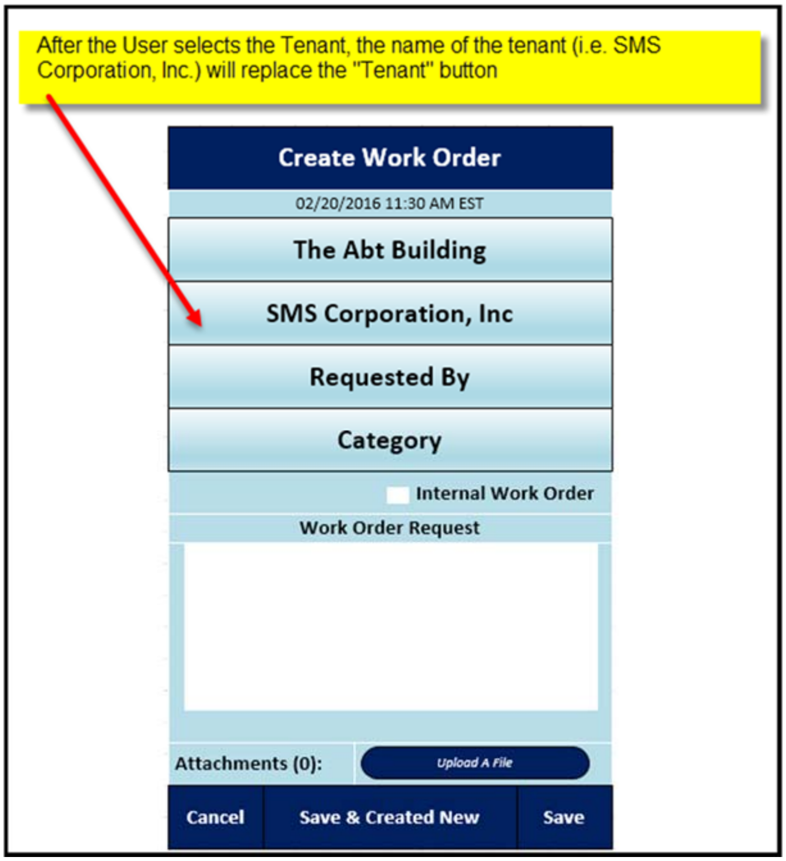
NOTE: If the User only has access to One Building, then that building will default, the user will NOT have to select the Building.

3.8 **Enter Tenant**

When the User selects the "Tenant" button, a list of all the tenants for that building will be displayed:



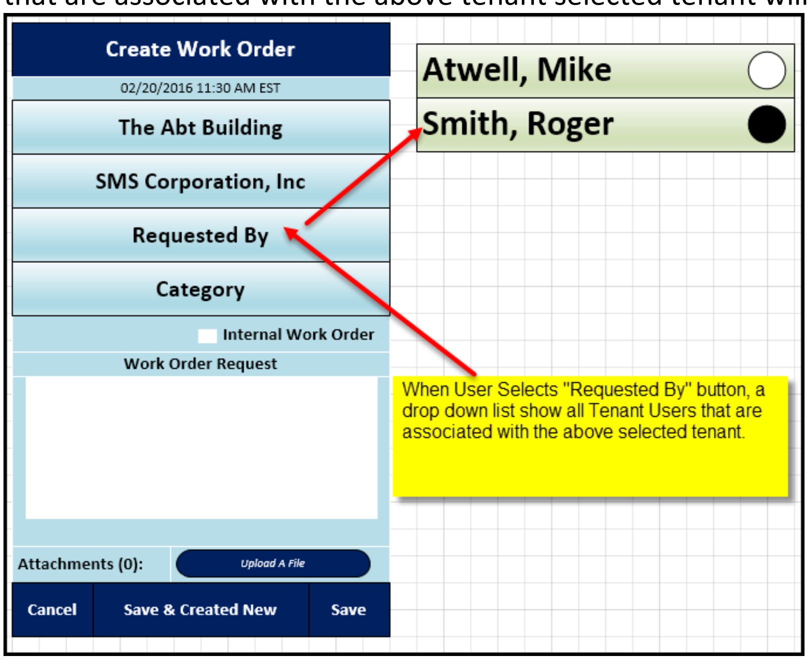
3.9 Once the User selects a tenant, the "Tenant" menu will change to the tenant name (i.e. SMS Corporation, Inc.).



NOTE: If the Building only has one tenant, then that tenant name will default, the user will NOT have to select the Tenant.

3.10 **Enter Requested By**

When the User selects the "Requested By" button, a list of all the tenants users that are associated with the above tenant selected tenant will be displayed:

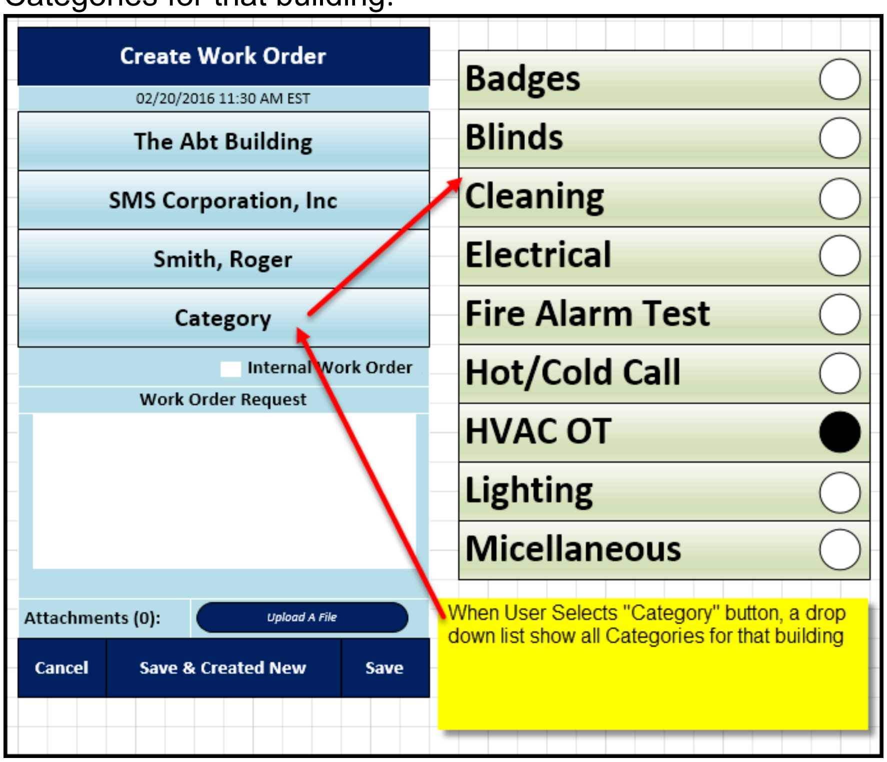


3.11 After the User selects the Requested By button, the tenant user name (i.e. Smith, Roger) will replace the "Requested By" button

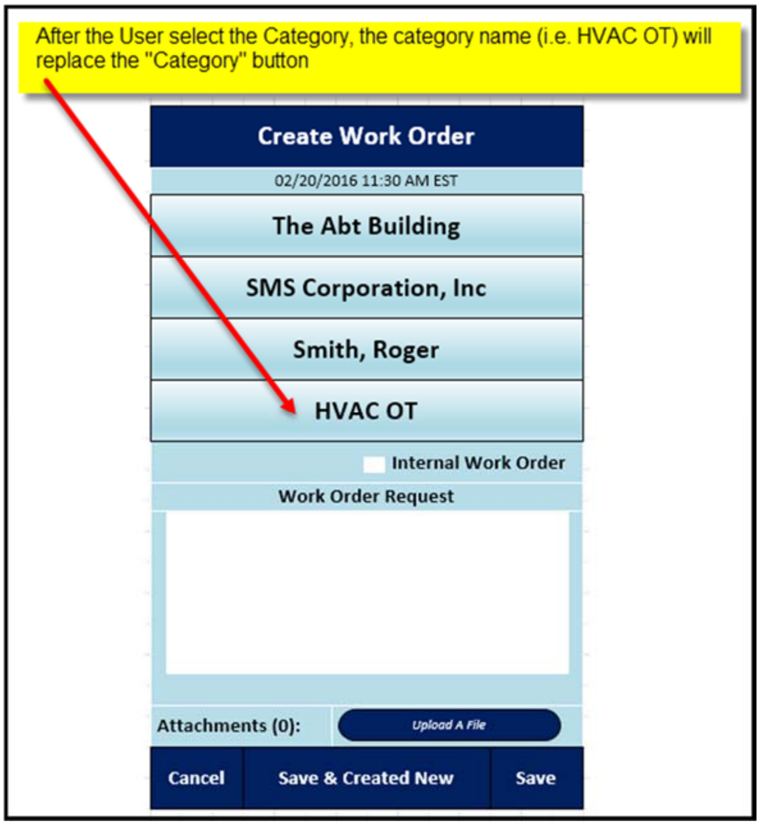
NOTE: If the Requested By only has one tenant user, then that tenant user will default, the user will NOT have to select the Requested By button.

3.12 **Enter Category**

When User Selects "Category" button, a drop down list shows all Categories for that building:



3.13 After the User selects the “Category” button, the category name (i.e. HVAC OT) will replace the "Category" button



3.14 **Internal Work Order**

If User select internal work order, a check will appear showing that the work order is for internal use only, No e-mail will be sent to the tenant. The tenant will not see this work order when they log onto the system either.

3.15 **Work Order Request**

when the user selects Work Order Request, they will have the ability to add/modify the work order request description.

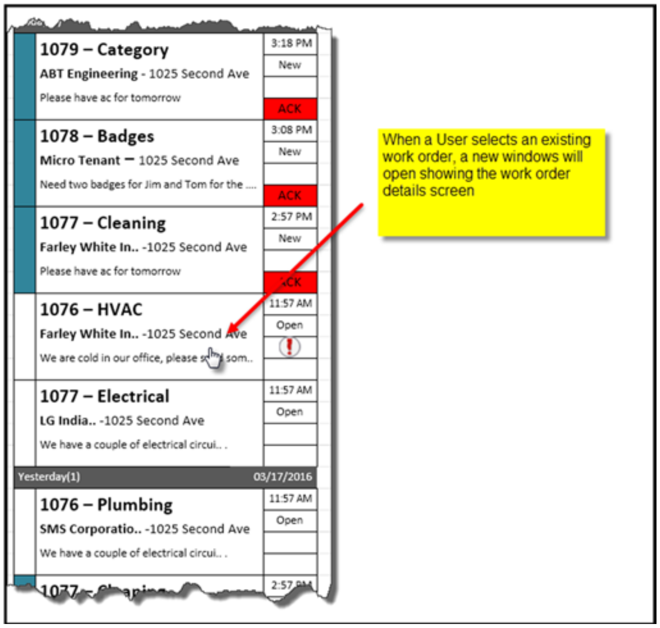
3.16 **Attachments (0)**

The attachment menu will show the amount attachments that are uploaded for the new work order.

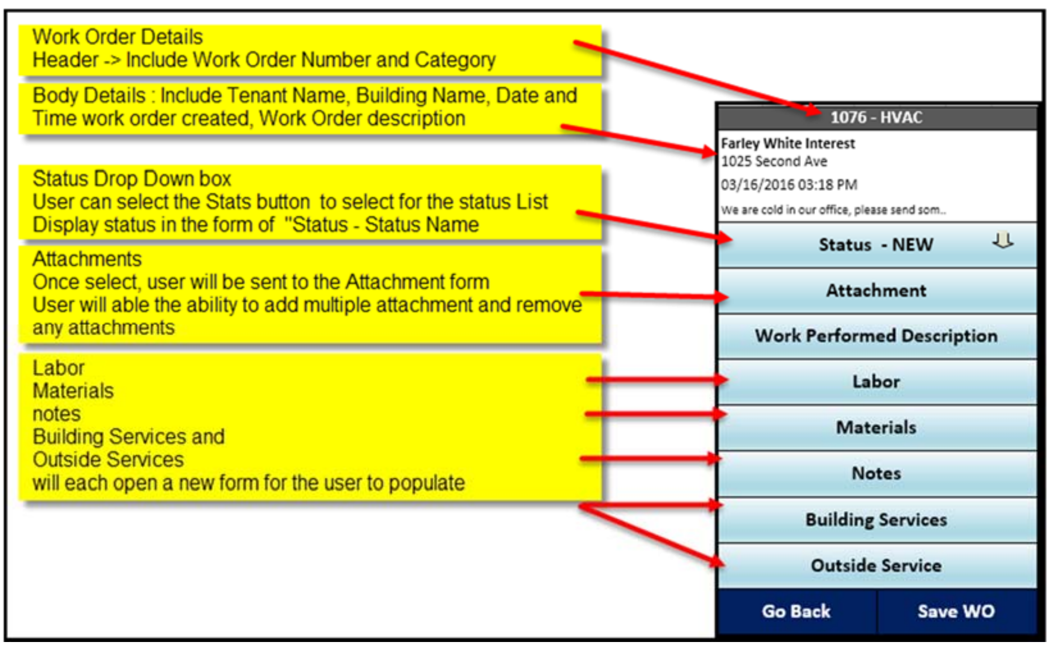
3.16.1 User will be able to add mutlitple attachement to the new work order. Also the user will have the ability to remove the attachements

4 Work Order Details

4.1 When a User selects an existing work order, a new window will open showing the work order details screen.



4.2 Work Order Details will consist of 10 Parts



4.3 Header

4.3.1 Header will have the work order number and Category

4.4 Body Details

4.4.1 1st Line will have the Tenant Name

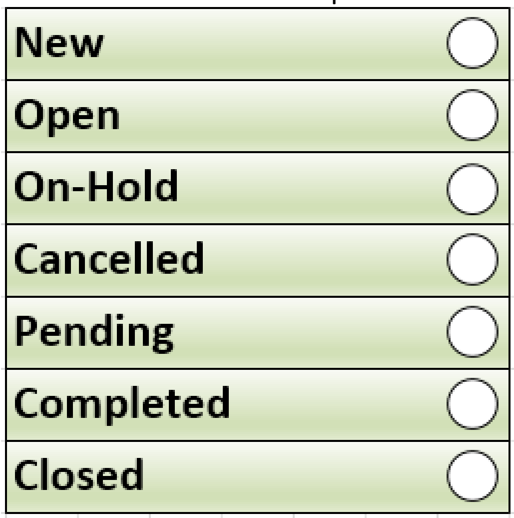
4.4.2 2nd line will have the Building Name

4.4.3 3rd line will have the date and time work order was created

4.4.4 4th line will have the work order description

4.5 Status Menu

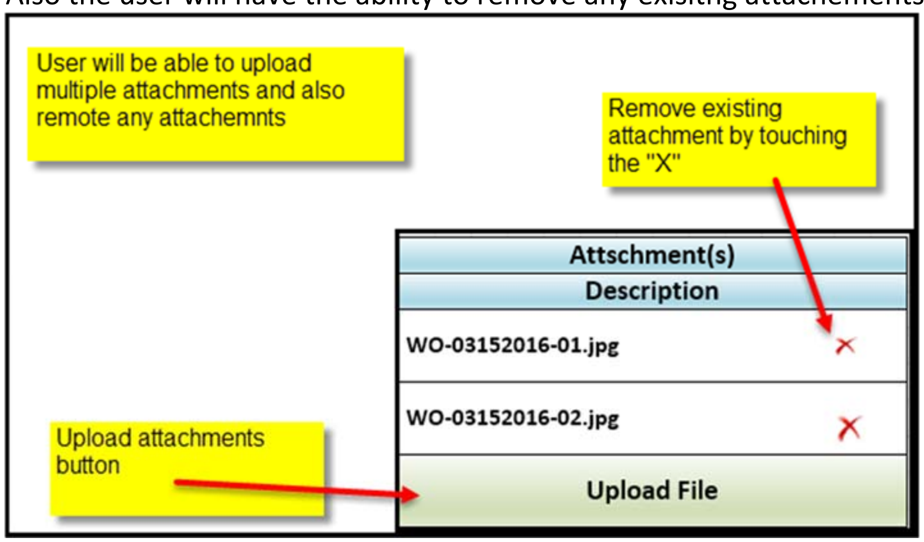
4.5.1 Status menu will be a drop down menu the will show the status list



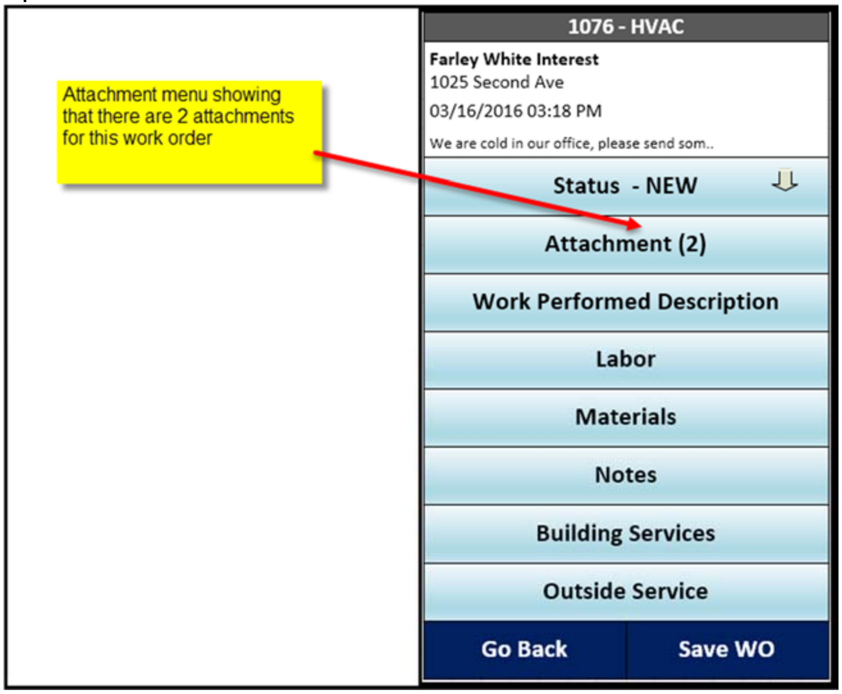
4.6 Attachment Menu

4.6.1 When User selects Attachment , a new window will open showing the Attachment screen

4.6.2 User will be able to add mutlitple attachement to an exisitng work order. Also the user will have the ability to remove any exisitng attachements



4.6.3 The attachment menu will show the amount attachments that are uploaded for the work order.

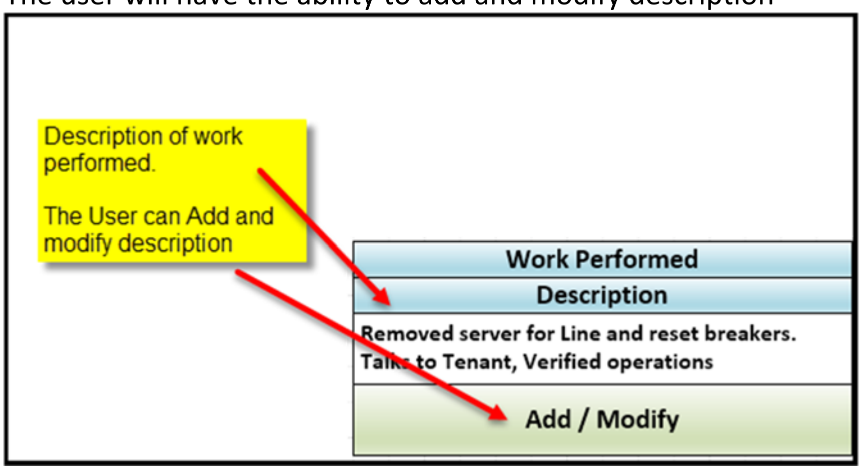


4.7 Work Performed Description

4.7.1 Change "Description of Work" to "Work Performed Description"

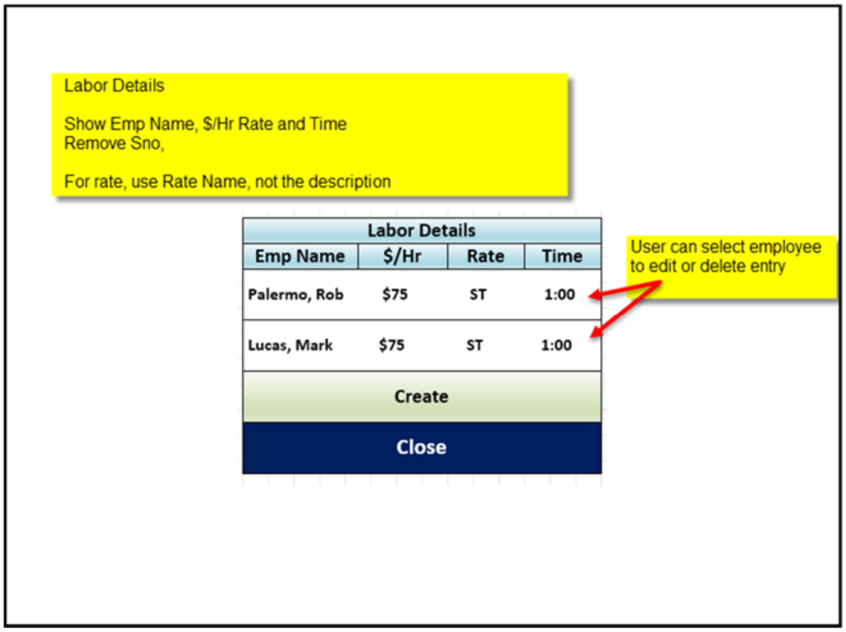
4.7.2 When User selects "Work Performed Description", a new window will open showing the Work Performed screen.

4.7.3 The user will have the ability to add and modify description



4.8 Labor

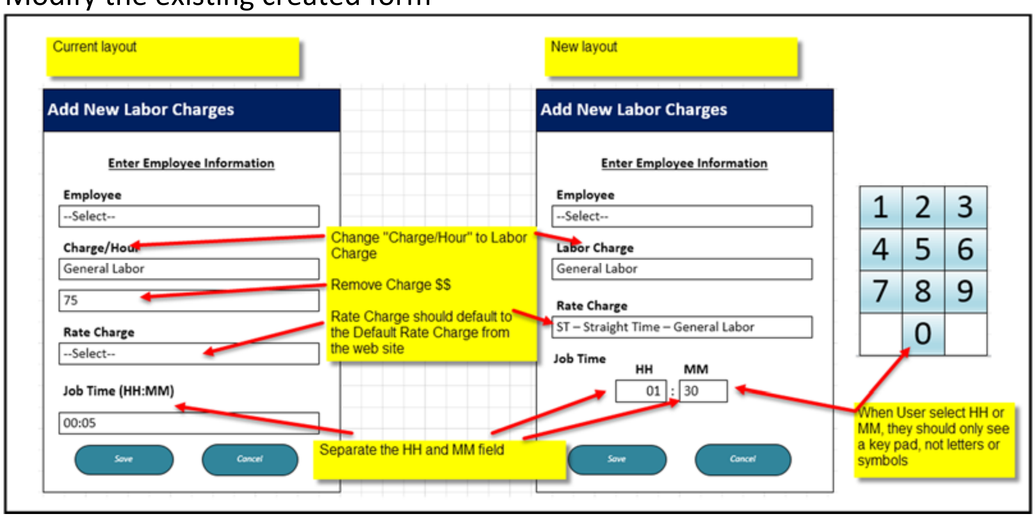
4.8.1 When User selects Labor, a new window will open showing the Labor screen.



4.8.2 Display Emp Name, $/Hr, Rate and Time.
Remove the Sno field
For Rate, use the Rate Name, **not** the rate description

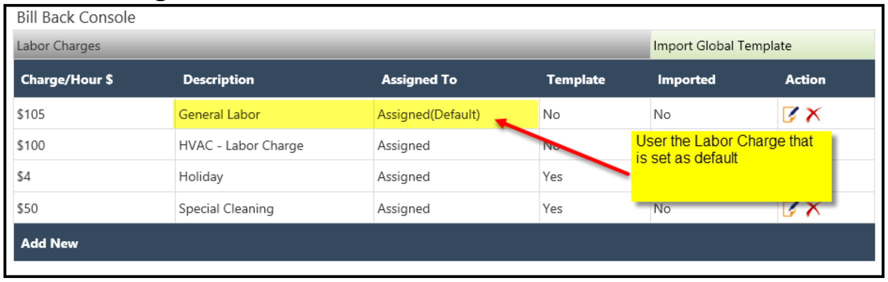
4.8.3 If user select an existing labor charge, they will have the ability to edit or remove the select labor charge

4.8.4 Modify the existing created form



4.8.5 Change “Charge/Hour” to “Labor Charge”

4.8.6 Make sure that the default labor charge is select from the web site for that building



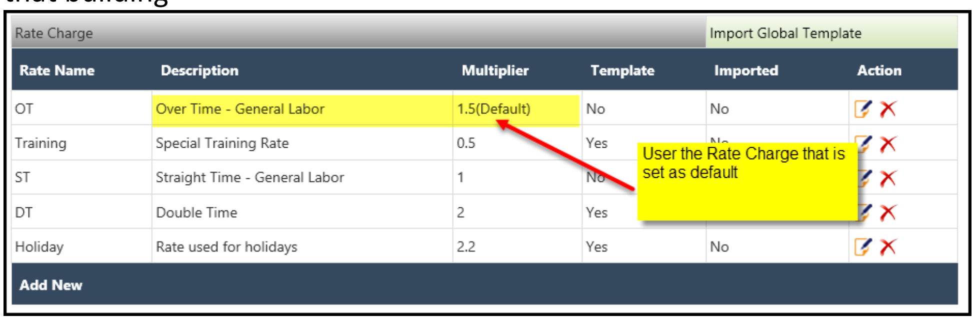
Bill Back Console

Labor Charges | Import Global Template

Charge/Hour $	Description	Assigned To	Template	Imported	Action
$105	General Labor	Assigned(Default)	No	No	
$100	HVAC - Labor Charge	Assigned	No		
$4	Holiday	Assigned	Yes		
$50	Special Cleaning	Assigned	Yes	No	
Add New					

4.8.7 Remove the actual $$ cost for view, we do not want them to be able to change the rate that is being charge from the app.

4.8.8 **Rate charge** should also use the default rate charge from the web site for that building

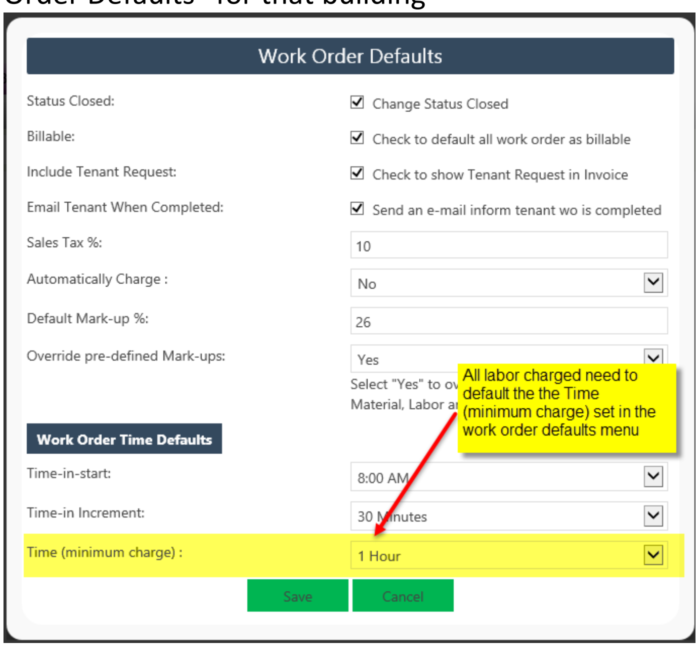


Rate Charge | Import Global Template

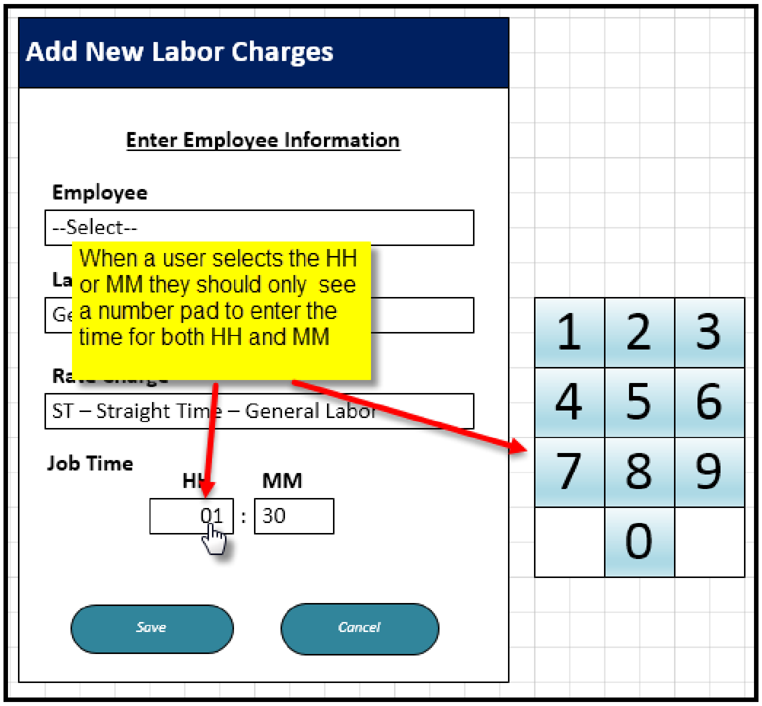
Rate Name	Description	Multiplier	Template	Imported	Action
OT	Over Time - General Labor	1.5(Default)	No	No	
Training	Special Training Rate	0.5	Yes	No	
ST	Straight Time - General Labor	1	No		
DT	Double Time	2	Yes		
Holiday	Rate used for holidays	2.2	Yes	No	
Add New					

4.8.9 **Job Time** – Separate the HH and MM for ease of user for the user.

4.8.10 Job time should use the default minimum time from the web site "Work Order Defaults" for that building

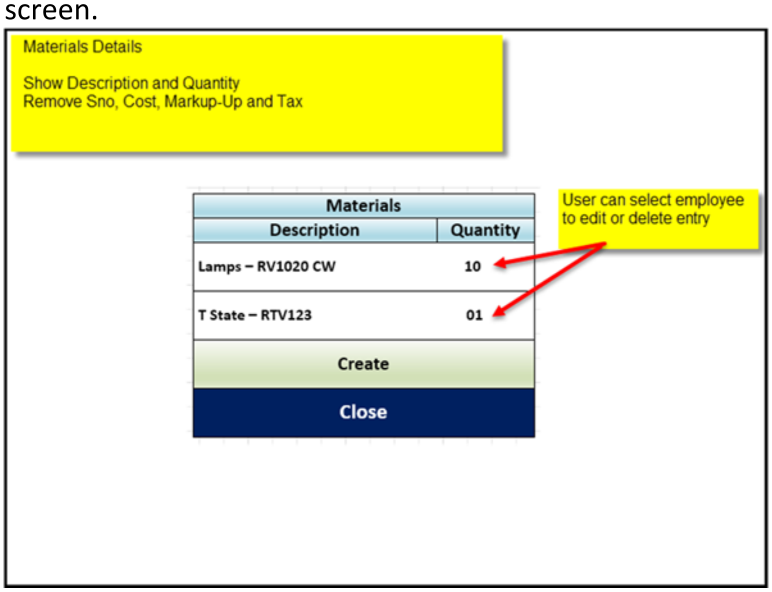


4.8.11 When the user select the HH or MM they should be given a Number Pad to enter the Job Time



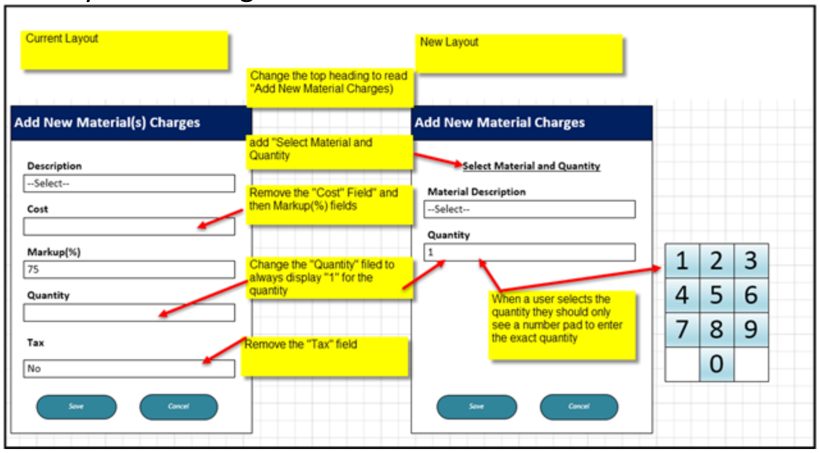
4.9 Material Menu

4.9.1 When User selects Materials, a new windows will open the Materials screen.



4.9.2 Remove Sno, Cost Mark-Up and Tax fields from the current app. The engineers do not need to see this information.

4.9.3 Modify the existing create form



4.9.4 Change the top header to read "Add New material charges"

4.9.5 Add "Select Material and Quantity"

4.9.6 Remove the "Cost" field, the user doesn't need see or edit this field.

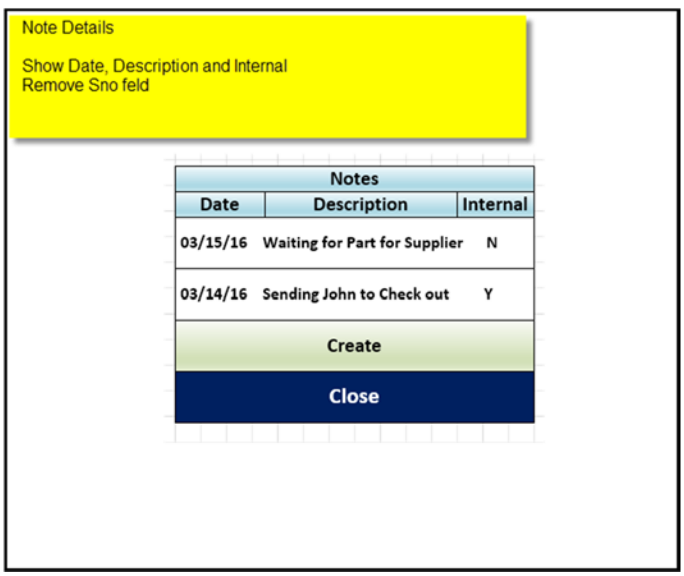
4.9.7 Remove the "Markup (%)" field, the user doesn't need to see or edit this field.

4.9.8 Quantity field should default to "1", with the user having the ability to modify it.

4.9.9 When user select the "Quantity" field they should only see a number pad to enter the exact quantity.

4.10 Notes

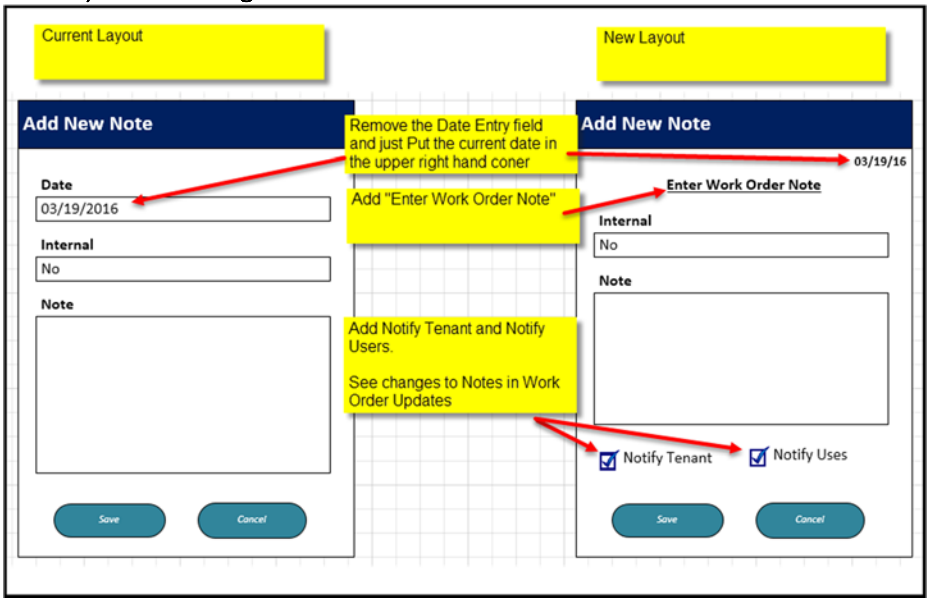
4.10.1 When user selects Notes, a new windows will open showing the Note screen.



4.10.2 Display Date, Description and Internal, remove Sno field

4.10.3 If User selects and existing Note, the user will NOT be able to edit or delete note. (This should be only done via the web site)

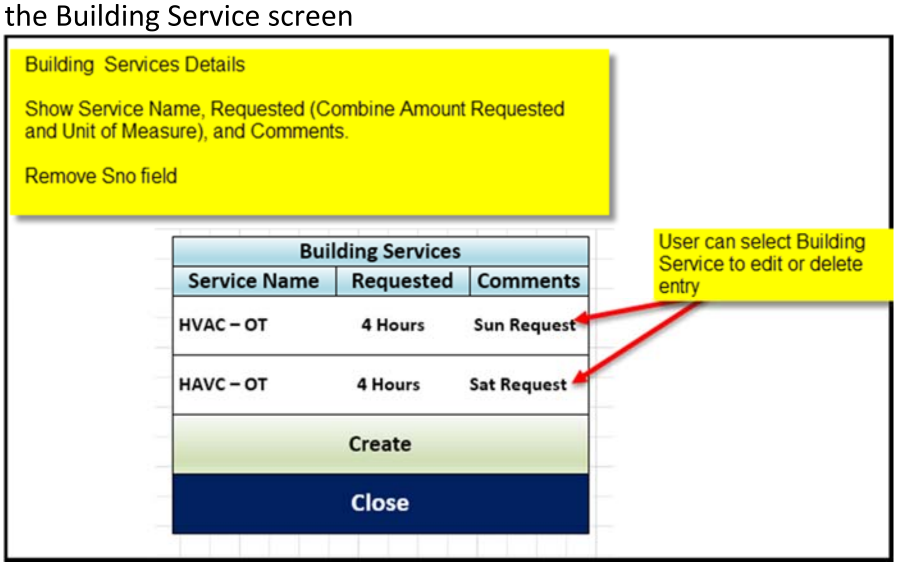
4.10.4 Modify the existing Notes Form



4.10.5 Remove the Date Entry field, and show current date in upper right corner
4.10.6 Add “Enter Work Order Note”
4.10.7 Add two new fields, Notify Tenant and Notify Users.
The Notify will be a new Option for the notes.
If Notify Tenant is check, and e-mail will be sent to the Tenant User and any other user that is Cc’ed informing them of the new note.
If Notify Users is checked, then e-mail all users that are associated with the work order Category E-Mail distribution Group and the Default E-Mail distribution group. (Do not e-mail any User more than once!)

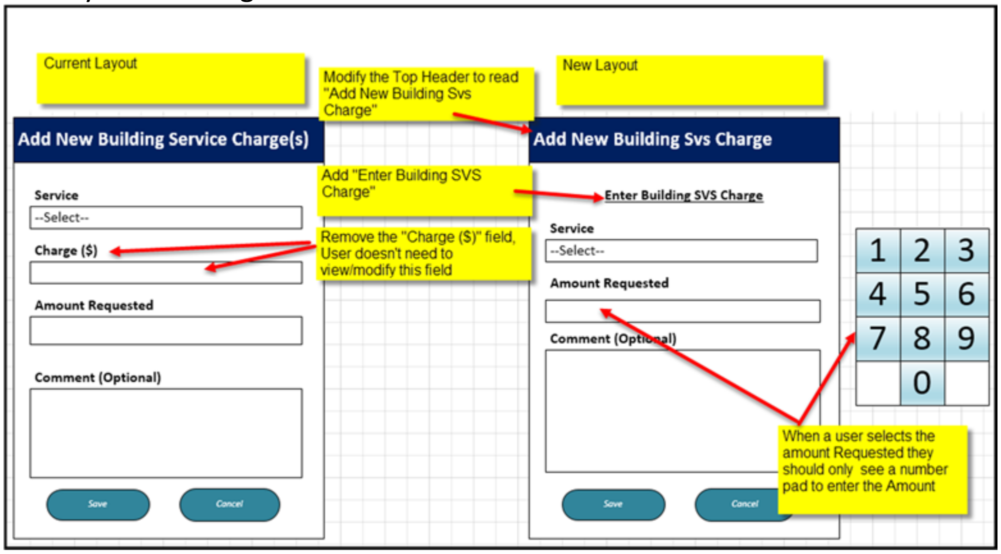
4.11 Building Service

4.11.1 When User select Building Services, a new windows will open showing the Building Service screen



4.11.2 Display the Service Name, Requested (This will combine the Amount Requested and Unit of Measure in one field) and Comments.
4.11.3 Remove Sno, Charge and Unit of Measure fields.

4.11.4 Modify the existing create form



4.11.5 Modify the Top Header to read " Add New Building Svs Charge"

4.11.6 Add "Enter Building Svs Charge"

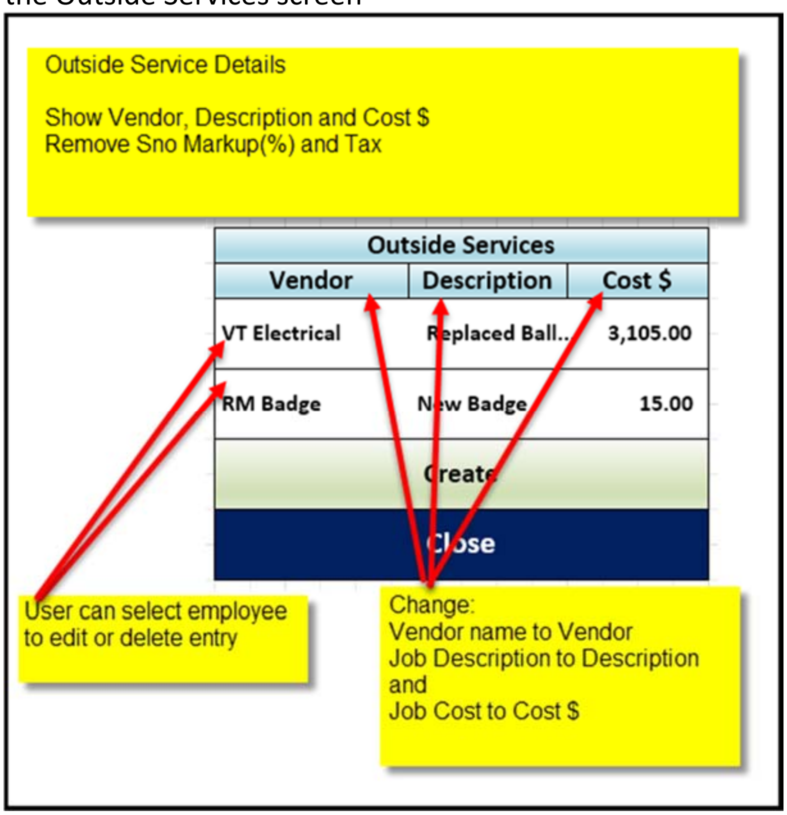
4.11.7 Remove the "Charge ($)" field, user doesn't need to be able to add/modify this field.

4.11.8 Amount Requested should default to Minimum required from the Building Services Menu for the current building.

4.11.9 When the user select the "Amount Requested, they should be given a Number Pad to enter the Amount.

4.12 Outside services

4.12.1 When the user select Outside Services, a new windows will open showing the Outside Services screen

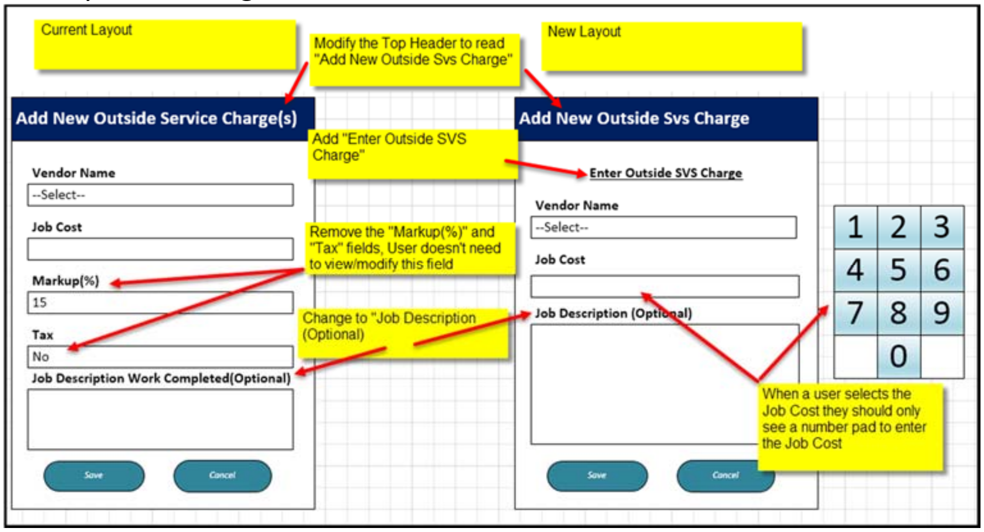


4.12.2 Display Vendor (Change from Vendor Name), Description (Change from Job Description) and Cost $ (Change from Job Cost).

4.12.3 Remove Sno, Markup(%) and Tax fields

4.12.4 If user selects and existing Vendor, they will have the ability to edit or remove the selected Vendor charge.

4.12.5 Modify the existing created form:



4.12.6 Change the Top Header to read "Add New Outside Svs Charge"

4.12.7 Add "Enter Outside Svs Charge" label

4.12.8 Remove "Markup (%)" and "Tax" fields, User doesn't need to be able to modify or change these fields.

4.12.9 Change description to read "Job Description (Optional)"