

Modify the Phone App

Problem ID 1084

Issue Modify the main page

Priority 1



Module

Issue Type Add new Functionality to existing Module

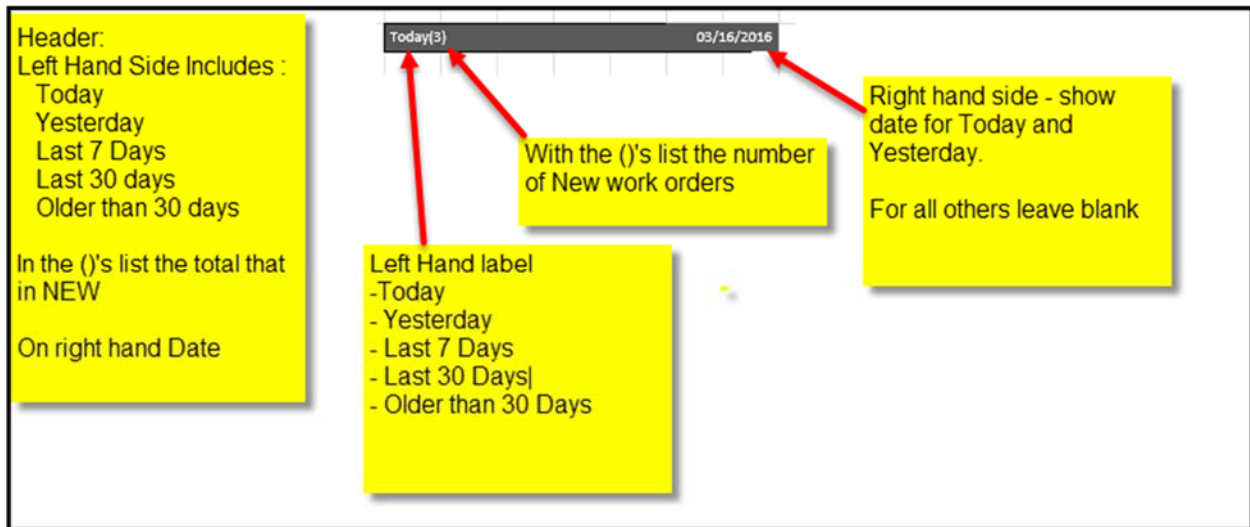
User Name

Description: Change the main Page

See Below for reference

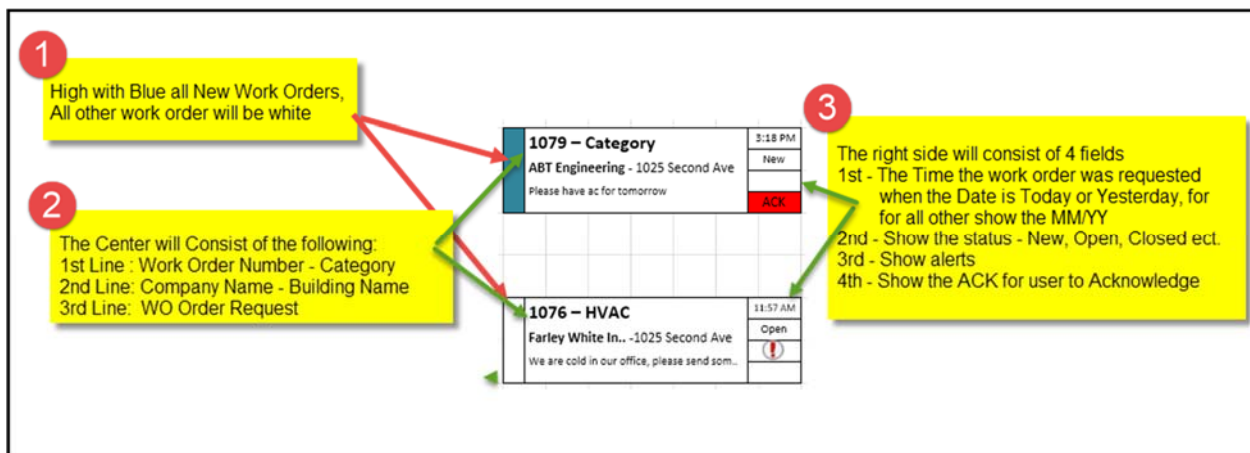
Today(3)		03/16/2016
1079 – Category ABT Engineering - 1025 Second Ave Please have ac for tomorrow	3:18 PM	
	New	
		ACK
1078 – Badges Micro Tenant — 1025 Second Ave Need two badges for Jim and Tom for the ....	3:08 PM	
	New	
		ACK
1077 – Cleaning Farley White In.. -1025 Second Ave Please have ac for tomorrow	2:57 PM	
	New	
		ACK
1076 – HVAC Farley White In.. -1025 Second Ave We are cold in our office, please send som..	11:57 AM	
	Open	
		
1077 – Electrical LG India.. -1025 Second Ave We have a couple of electrical circui..	11:57 AM	
	Open	
Yesterday(1)		03/17/2016
1076 – Plumbing SMS Corporatio.. -1025 Second Ave We have a couple of electrical circui..	11:57 AM	
	Open	
1077 – Cleaning Farley White In.. -1025 Second Ave Please have ac for tomorrow	2:57 PM	
	New	
		
		ACK
Refresh		Create
		Search Order

## 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 will 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 1<sup>st</sup> (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 2<sup>ND</sup> (from the top) display the current status of the work order

2.3.3 3<sup>rd</sup> (From the top) display any alert notifications

2.3.4 4<sup>th</sup> (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.

The screenshot displays a mobile application interface for managing work orders. At the top, there is a header with the text "We have a couple of electrical circui...". Below this, a list of work orders is shown. The first work order is "1077 - Cleaning" by "Farley White In.. -1025 Second Ave" with a status of "New" and a time of "2:57 PM". A red "ACK" button is visible next to this work order. A yellow callout box with a red arrow points to the "Create" button at the bottom of the screen, with the text "Select 'Create' to create a new work order". The bottom of the screen features a dark blue navigation bar with three buttons: "Refresh", "Create", and "Search Order".

Work Order Number	Category Name	Tenant Name	Building Name	Status	Time
1077	Cleaning	Farley White In..	-1025 Second Ave	New	2:57 PM

3.2 Modify existing “Create Work Order” screen.

The image shows a side-by-side comparison of two versions of the 'Create Work Order' screen. The 'Current Layout' on the left is a form with fields for Building, Tenant, Requested By, Category, Date, Time, Internal WO, Work Order Request, Internal Notes, and Attachment. The 'New Layout' on the right is a simplified version with buttons for Building, Tenant, Requested By, and Category, a checkbox for Internal Work Order, a large Work Order Request text area, and an Attachments field. Red arrows and yellow callout boxes indicate the changes: 'Move Time and Date of work order to the top of the screen', 'Created nice large Buttons for user to enter information', 'Remove Date and Time fields', 'Remove Internal Notes field', and 'Modify the Attachments field so that a user can add more than one attachment'.

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:

The image shows the 'Create Work Order' screen with the 'Building' button selected. A dropdown list is displayed, showing a list of buildings: The Abt Building, West Street, New Building, Lucad Building, Light House, Main Street, and Sixty Sate. A yellow callout box explains: 'When User Selects "Building" button, a drop down list show all building the user has access to.'

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

After the User select the Building, the name of the building (i.e. The Abt Building) will replace the "Building" button

**Create Work Order**  
02/20/2016 11:30 AM EST

**The Abt Building**

**Tenant**

**Requested By**

**Category**

☐ Internal Work Order

Work Order Request

Attachments (0): [Upload A File](#)

**Cancel** **Save & Created New** **Save**

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:

**Create Work Order**  
02/20/2016 11:30 AM EST

**The Abt Building**

**Tenant**

**Requested By**

**Category**

☐ Internal Work Order

Work Order Request

Attachments (0): [Upload A File](#)

**Cancel** **Save & Created New** **Save**

ABT Engineering ☐

SMS Corporation, Inc ☒

O'Malley and Harvey ☐

LG India ☐

Lucas, LLC ☐

General Systems, Inc ☐

Xerox ☐

When User Selects "Tenant" button, a drop down list shows all the tenants for the building selected.

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

After the User selects the Tenant, the name of the tenant (i.e. SMS Corporation, Inc.) will replace the "Tenant" button

The screenshot shows a mobile application interface for creating a work order. At the top is a dark blue header with the text 'Create Work Order'. Below it is a light blue bar with the timestamp '02/20/2016 11:30 AM EST'. The form consists of several light blue buttons stacked vertically: 'The Abt Building', 'SMS Corporation, Inc', 'Requested By', and 'Category'. Below these buttons is a section with a checkbox labeled 'Internal Work Order' and a text input field labeled 'Work Order Request'. At the bottom of the form is a dark blue bar with three buttons: 'Cancel', 'Save & Created New', and 'Save'. A red arrow points from a yellow text box at the top to the 'SMS Corporation, Inc' button.

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:

This screenshot shows the same 'Create Work Order' form as before, but with a dropdown list open next to the 'Requested By' button. The dropdown list contains two entries: 'Atwell, Mike' with a white circle indicator and 'Smith, Roger' with a black circle indicator. A red arrow points from the 'Requested By' button to the dropdown list. A yellow text box at the bottom right explains that this list shows all tenant users associated with the selected tenant. The form buttons and layout are identical to the previous screenshot.

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

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

Create Work Order	
02/20/2016 11:30 AM EST	
The Abt Building	
SMS Corporation, Inc	
Smith, Roger	
Category	
<input type="checkbox"/> Internal Work Order	
Work Order Request	
Attachments (0): <a href="#">Upload A File</a>	
Cancel	Save & Created New
Save	

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:

Create Work Order	
02/20/2016 11:30 AM EST	
The Abt Building	
SMS Corporation, Inc	
Smith, Roger	
Category	
<input type="checkbox"/> Internal Work Order	
Work Order Request	
Attachments (0): <a href="#">Upload A File</a>	
Cancel	Save & Created New
Save	

Badges	<input type="radio"/>
Blinds	<input type="radio"/>
Cleaning	<input type="radio"/>
Electrical	<input type="radio"/>
Fire Alarm Test	<input type="radio"/>
Hot/Cold Call	<input type="radio"/>
HVAC OT	<input checked="" type="radio"/>
Lighting	<input type="radio"/>
Micellaneous	<input type="radio"/>

When User Selects "Category" button, a drop down list show 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

After the User select the Category, the category name (i.e. HVAC OT) will replace the "Category" button

Create Work Order	
02/20/2016 11:30 AM EST	
The Abt Building	
SMS Corporation, Inc	
Smith, Roger	
HVAC OT	
<input type="checkbox"/> Internal Work Order	
Work Order Request	
<div>Attachments (0):</div> <div>Upload A File</div>	
Cancel	Save & Created New
Save	

### 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.

A screenshot of a mobile application interface showing a list of work orders. The list includes categories like 'Category', 'Badges', 'Cleaning', 'HVAC', 'Electrical', and 'Plumbing'. Each entry shows a tenant name, address, and a status (e.g., 'New', 'Open', 'ACK'). A red arrow points from a yellow callout box to the 'ACK' button of the '1076 - HVAC' work order.

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

## 4.2 Work Order Details will consist of 10 Parts

A diagram illustrating the layout of the 'Work Order Details' screen. The screen is divided into several sections, each with a corresponding annotation in a yellow box. Red arrows point from the annotations to the respective parts of the screen.

- Work Order Details Header -> Include Work Order Number and Category**: Points to the top header section.
- Body Details : Include Tenant Name, Building Name, Date and Time work order created, Work Order description**: Points to the main body section.
- Status Drop Down box**: Points to the 'Status - NEW' dropdown menu.
- Attachments**: Points to the 'Attachment' button.
- Labor**: Points to the 'Labor' button.
- Materials**: Points to the 'Materials' button.
- Notes**: Points to the 'Notes' button.
- Building Services and Outside Services**: Points to the 'Building Services' and 'Outside Service' buttons.

The screen also includes a 'Go Back' button and a 'Save WO' button at the bottom.

### 4.3 Header

- 4.3.1 Header will have the work order number and Category

### 4.4 Body Details

- 4.4.1 1<sup>st</sup> Line will have the Tenant Name

- 4.4.2 2<sup>nd</sup> line will have the Building Name

4.4.3 3<sup>rd</sup> line will have the date and time work order was created

4.4.4 4<sup>th</sup> line will have the work order description

#### 4.5 Status Menu

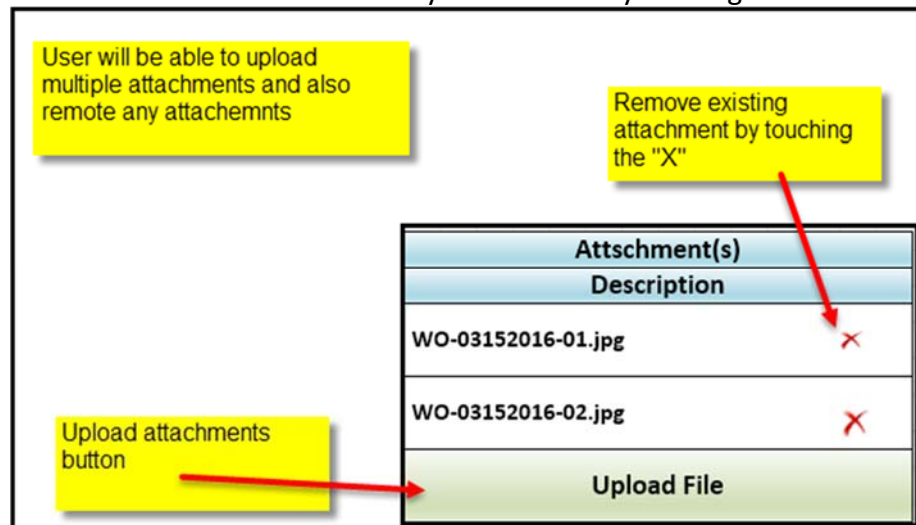
4.5.1 Status menu will be a drop down menu the will show the status list

New	<input type="radio"/>
Open	<input type="radio"/>
On-Hold	<input type="radio"/>
Cancelled	<input type="radio"/>
Pending	<input type="radio"/>
Completed	<input type="radio"/>
Closed	<input type="radio"/>

#### 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 attachments



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

Attachment menu showing that there are 2 attachments for this work order

1076 - HVAC

Farley White Interest  
1025 Second Ave  
03/16/2016 03:18 PM  
We are cold in our office, please send som..

Status - NEW

Attachment (2)

Work Performed Description

Labor

Materials

Notes

Building Services

Outside Service

Go Back

Save WO

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

Description of work performed.  
The User can Add and modify description

Work Performed Description

Removed server for Line and reset breakers.  
Talk to Tenant, Verified operations

Add / Modify

## 4.8 Labor

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

**Labor Details**

Show Emp Name, \$/Hr Rate and Time  
Remove Sno,  
For rate, use Rate Name, not the description

Emp Name	\$/Hr	Rate	Time
Palermo, Rob	\$75	ST	1:00
Lucas, Mark	\$75	ST	1:00

Create

Close

User can select employee to edit or delete entry

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

**Current layout**

**Add New Labor Charges**

Enter Employee Information

Employee  
--Select--

Charge/Hour  
General Labor

75

Rate Charge  
--Select--

Job Time (HH:MM)  
00:05

Save Cancel

**New layout**

**Add New Labor Charges**

Enter Employee Information

Employee  
--Select--

Labor Charge  
General Labor

Rate Charge  
ST - Straight Time - General Labor

Job Time HH MM  
01 : 30

Save Cancel

1 2 3  
4 5 6  
7 8 9  
0

When User select HH or MM, they should only see a key pad, not letters or symbols

Change "Charge/Hour" to Labor Charge  
Remove Charge \$\$  
Rate Charge should default to the Default Rate Charge from the web site  
Separate the HH and MM field

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	No	
\$4	Holiday	Assigned	Yes	No	
\$50	Special Cleaning	Assigned	Yes	No	

**Add New**

*Use the Labor Charge that is set as default*

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	No	
DT	Double Time	2	Yes	No	
Holiday	Rate used for holidays	2.2	Yes	No	

**Add New**

*Use the Rate Charge that is set as default*

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

**Work Order Defaults**

Status Closed: ☒ Change Status Closed

Billable: ☒ Check to default all work order as billable

Include Tenant Request: ☒ Check to show Tenant Request in Invoice

Email Tenant When Completed: ☒ Send an e-mail inform tenant wo is completed

Sales Tax %:

Automatically Charge :

Default Mark-up %:

Override pre-defined Mark-ups:   
Select "Yes" to override pre-defined Mark-ups for Material, Labor and Subcontractor

**Work Order Time Defaults**

Time-in-start:

Time-in Increment:

Time (minimum charge) :

**Save** **Cancel**

*All labor charged need to default the the Time (minimum charge) set in the work order defaults menu*

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

Add New Labor Charges

Enter Employee Information

Employee

--Select--

La

Ge

Rate Charge

ST – Straight Time – General Labor

Job Time

HH

MM

01

:

30

Save

Cancel

When a user selects the HH or MM they should only see a number pad to enter the time for both HH and MM

1	2	3
4	5	6
7	8	9
	0	

4.9 Material Menu

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

Materials Details

Show Description and Quantity

Remove Sno, Cost, Markup-Up and Tax

Materials	
Description	Quantity
Lamps – RV1020 CW	10
T State – RTV123	01

Create

Close

User can select employee to edit or delete entry

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

**Current Layout**

**Add New Material(s) Charges**

Description  
--Select--

Cost

Markup(%)  
75

Quantity

Tax  
No

Save Cancel

**New Layout**

**Add New Material Charges**

Select Material and Quantity

Material Description  
--Select--

Quantity  
1

1 2 3  
4 5 6  
7 8 9  
0

Save Cancel

Annotations:

- Change the top heading to read "Add New Material Charges"
- add "Select Material and Quantity"
- Remove the "Cost" Field and then Markup(%) fields
- Change the "Quantity" field to always display "1" for the quantity
- Remove the "Tax" field
- When a user selects the quantity they should only see a number pad to enter the exact quantity

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.

**Note Details**

Show Date, Description and Internal  
Remove Sno field

Notes		
Date	Description	Internal
03/15/16	Waiting for Part for Supplier	N
03/14/16	Sending John to Check out	Y

Create

Close

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

**Current Layout**

**Add New Note**

Date  
03/19/2016

Internal  
No

Note

Save Cancel

**New Layout**

**Add New Note**

03/19/16

Enter Work Order Note

Internal  
No

Note

☒ Notify Tenant ☒ Notify Uses

Save Cancel

Remove the Date Entry field and just Put the current date in the upper right hand corner

Add "Enter Work Order Note"

Add Notify Tenant and Notify Users.  
See changes to Notes in Work Order Updates

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

**Building Services Details**

Show Service Name, Requested (Combine Amount Requested and Unit of Measure), and Comments.

Remove Sno field

Building Services		
Service Name	Requested	Comments
HVAC - OT	4 Hours	Sun Request
HAVC - OT	4 Hours	Sat Request

Create

Close

User can select Building Service to edit or delete entry

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

**Current Layout**

**Add New Building Service Charge(s)**

Service  
--Select--

Charge (\$)

Amount Requested

Comment (Optional)

Save Cancel

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

**New Layout**

**Add New Building Svs Charge**

Service  
--Select--

Amount Requested

Comment (Optional)

Save Cancel

**Add "Enter Building SVS Charge"**

**Remove the "Charge (\$)" field. User doesn't need to view/modify this field**

**When a user selects the amount Requested they should only see a number pad to enter the Amount**

1	2	3
4	5	6
7	8	9
	0	

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

**Outside Service Details**

Show Vendor, Description and Cost \$  
Remove Sno Markup(%) and Tax

Vendor	Description	Cost \$
VT Electrical	Replaced Ball...	3,105.00
RM Badge	New Badge	15.00

Create

Close

**User can select employee to edit or delete entry**

**Change:  
Vendor name to Vendor  
Job Description to Description  
and  
Job Cost to Cost \$**

- 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:

**Current Layout**

**Add New Outside Service Charge(s)**

Vendor Name  
--Select--

Job Cost

Markup(%)  
15

Tax  
No

Job Description Work Completed(Optional)

Save Cancel

**New Layout**

**Add New Outside Svs Charge**

Enter Outside SVS Charge

Vendor Name  
--Select--

Job Cost

Job Description (Optional)

Save Cancel

1 2 3  
4 5 6  
7 8 9  
0

When a user selects the Job Cost they should only see a number pad to enter the Job Cost

- 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)”