

Modify the Phone App

Problem ID 1084

Issue Modify the main page



Priority 1

Module

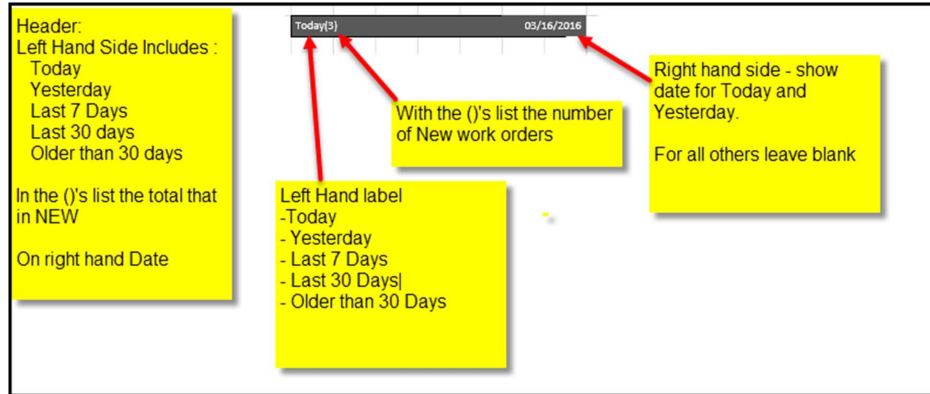
Issue Type Add new Functionality to existing Module

User Name

Description: Change the main Page  
See Below for reference

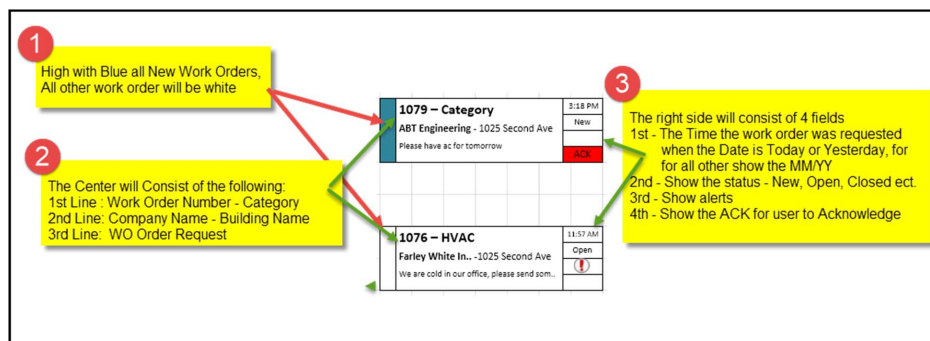
Today(3) 03/16/2016	
<b>1079 – Category</b>	3:18 PM
ABT Engineering - 1025 Second Ave	New
Please have ac for tomorrow	ACK
<b>1078 – Badges</b>	3:08 PM
Micro Tenant – 1025 Second Ave	New
Need two badges for Jim and Tom for the ...	ACK
<b>1077 – Cleaning</b>	2:57 PM
Farley White In.. -1025 Second Ave	New
Please have ac for tomorrow	ACK
<b>1076 – HVAC</b>	11:57 AM
Farley White In.. -1025 Second Ave	Open
We are cold in our office, please send som..	
<b>1077 – Electrical</b>	11:57 AM
LG India.. -1025 Second Ave	Open
We have a couple of electrical circui..	
Yesterday(1) 03/17/2016	
<b>1076 – Plumbing</b>	11:57 AM
SMS Corporatio.. -1025 Second Ave	Open
We have a couple of electrical circui..	
<b>1077 – Cleaning</b>	2:57 PM
Farley White In.. -1025 Second Ave	New
Please have ac for tomorrow	 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) ML - Shouldn't this be the work orders for that day, not just the new work order?
- 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. ML – What about additional updates from the tenant? Say we add in the new email note functionality, and the tenant sends a new note in response to the use note, shouldn't we show that it happened?
    - 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.
 ML – Shouldn't the user be able to acknowledge from the work order list screen?

### 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.

We have a couple of electrical circuit...		03/17/2016
		11:57 AM
Ave		Open
We have a couple of electrical circuit...		
<b>1077 – Cleaning</b>		2:57 PM
<b>Farley White Inc. -1025 Second Ave</b>		New
Please have ac for tomorrow		ACK
<div>Refresh Create Search Order</div>		

3.2 Modify existing "Create Work Order" screen.

Current Layout

New Layout

Create Work Order

Move Time and Date of work order to the top of the screen

Create Work Order

Building

Tenant

Requested By

Category

Date

Time

Internal WO

Work Order Request

Internal Notes

Attachment

Upload A File

Cancel

Save & Created New

Save

3.2 ML – Note: Save & Created New, should be Save & Create New

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:

Create Work Order

02/20/2016 11:30 AM EST

Building

Tenant

Requested By

Category

Internal Work Order

Work Order Request

Attachments (0):

Upload A File

Cancel

Save & Created New

Save

The Abt Building

West Street

New Building

Lucad Building

Light House

Main Street

Sixty Sate

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).

Formatted: Normal, Indent: Left: 0.5", No bullets or numbering

Formatted: Font: 12 pt

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 'Create Work Order' form. At the top, there's a title bar 'Create Work Order' and a timestamp '02/20/2016 11:30 AM EST'. Below this are several buttons: 'The Abt Building', 'SMS Corporation, Inc', 'Requested By', and 'Category'. The 'SMS Corporation, Inc' button is highlighted with a red arrow pointing to it from a yellow callout box. Below these buttons is a checkbox for 'Internal Work Order' and a text area for 'Work Order Request'. At the bottom, there's an 'Attachments (0):' section with an 'Upload A File' button and three main buttons: 'Cancel', 'Save & Created New', and 'Save'.

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

ML: Ever a case where the suer would confuse building and 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 'Create Work Order' form with a dropdown menu open next to the 'Requested By' button. The dropdown list contains two entries: 'Atwell, Mike' with an empty circle and 'Smith, Roger' with a filled black circle. A red arrow points from the 'Requested By' button to the dropdown list. A yellow callout box at the bottom right of the dropdown menu states: 'When User Selects "Requested By" button, a drop down list show all Tenant Users that are associated with the above selected tenant.' The form itself is identical to the previous screenshot, with 'SMS Corporation, Inc' selected as the tenant.

### 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

The screenshot shows a mobile application interface for creating a work order. The form has a blue header 'Create Work Order' and a timestamp '02/20/2016 11:30 AM EST'. Below the header, there are several fields: 'The Abt Building', 'SMS Corporation, Inc', 'Smith, Roger' (which is the result of selecting a user), and 'Category'. There is a checkbox for 'Internal Work Order' and a text area for 'Work Order Request'. At the bottom, there is an 'Attachments (0):' section with an 'Upload A File' button, and three buttons: 'Cancel', 'Save & Created New', and '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:

This screenshot shows the same 'Create Work Order' form as before, but with a dropdown menu open for the 'Category' field. The dropdown list contains the following options: 'Badges', 'Blinds', 'Cleaning', 'Electrical', 'Fire Alarm Test', 'Hot/Cold Call', 'HVAC OT' (which is selected and highlighted with a black circle), 'Lighting', and 'Micellaneous'. A red arrow points from the 'Category' button in the form to the dropdown list. A yellow callout box at the bottom right of the dropdown list contains the text: '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></div>	
Attachments (0):	<a href="#">Upload A File</a>
<a href="#">Cancel</a>	<a href="#">Save &amp; Created New</a> <a href="#">Save</a>

#### 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 attachment to the new work order.

Also the user will have the ability to remove the attachments

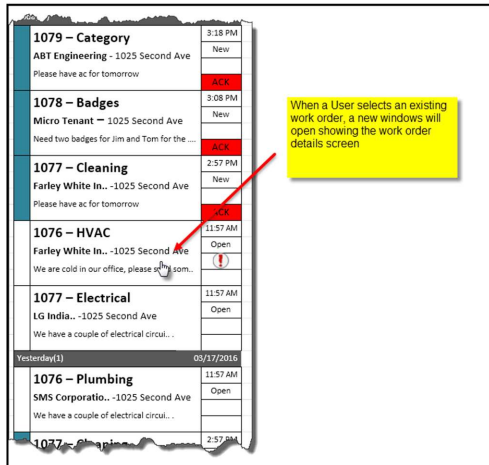
~~3.16.1~~ ML – What about adding attachments after the work order is created. What if the user requests that the tenant add more info via an attachment, then the tenant adds a attachment via the web page. It now should be uploaded here, right?

Formatted: Indent: Left: 1.5", No bullets or numbering

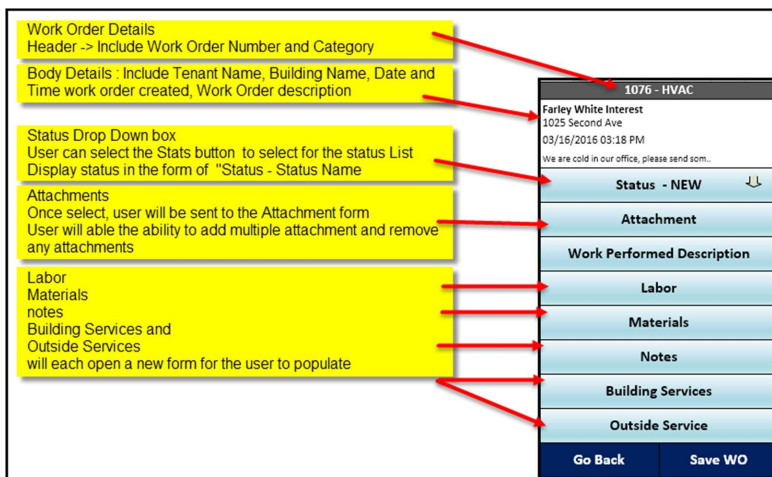


## 4 Work Order Details

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 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

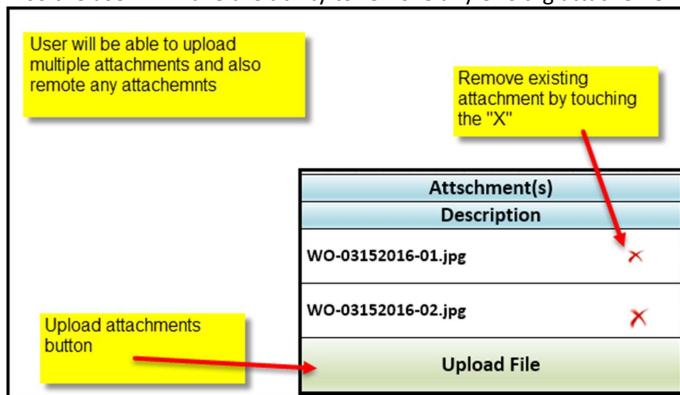
4.5.1 Status menu will be a drop down menu the will show the status list

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 attachment to an exisitng work order.  
Also the user will have the ability to remove any exisitng attachments



The mockup shows an 'Attachment(s)' screen with a table of existing attachments and an 'Upload File' button. Annotations explain the functionality of each element.

Attachment(s)	
Description	
WO-03152016-01.jpg	X
WO-03152016-02.jpg	X
Upload File	

Annotations:

- Yellow box: "User will be able to upload multiple attachments and also remove any attachments" (points to the 'Upload File' button).
- Yellow box: "Remove existing attachment by touching the 'X'" (points to the 'X' icon next to the first attachment).
- Yellow box: "Upload attachments button" (points to the 'Upload File' button).

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

<b>1076 - HVAC</b>	
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

4.6.3 ML – I assume that attachments do not download from the web automatically when the work order is displayed but only when the user tries to access them.

**Formatted:** Normal, Indent: Left: 1", No bullets or numbering

**Formatted:** Font: 12 pt

#### 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

<b>Work Performed Description</b>
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

New layout

Add New Labor Charges

Enter Employee Information

Employee  
--Select--

Charge/Hour  
General Labor

Rate Charge  
--Select--

Job Time (HH:MM)  
00:05

Save Cancel

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

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

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

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](#)

*Note: A red arrow points from the 'Assigned(Default)' cell to a yellow callout box that says '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](#)

*Note: A red arrow points from the '1.5(Default)' cell to a yellow callout box that says '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: ☒ Yes  
Select "Yes" to override the pre-defined Mark-up for Material, Labor and other charges.

**Work Order Time Defaults**

Time-in-start:

Time-in Increment:

Time (minimum charge) :

[Save](#) [Cancel](#)

*Note: A red arrow points from the '1 Hour' cell to a yellow callout box that says '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--

Rate  
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

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**

Material Description  
--Select--

Quantity  
1

Save Cancel

1 2 3  
4 5 6  
7 8 9  
0

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" ML - just text not a link, right?

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

4.10.5 Remove the Date Entry field, and show current date in upper right corner

4.10.6 Add "Enter Work Order Note"

4.10.6.4.10.7 ML – "Enter Work Order Note" just text not a link, right?

4.10.74.10.8 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

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

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.

Formatted: Font: 12 pt



#### 4.11.4 Modify the existing create form

**Current Layout**

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

**New Layout**

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

Service  
--Select--

Charge (\$)

Amount Requested

Comment (Optional)

Save Cancel

**Add New Building Svs Charge**

Enter Building SVS Charge

Service  
--Select--

Amount Requested

Comment (Optional)

Save Cancel

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" ML – just text not a link, right?

#### 4.11.64.11.7

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

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

#### 4.11.94.11.10 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

Outside Services		
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 an 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

New Layout

Modify the Top Header to read "Add New Outside Svs Charge"

Add "Enter Outside Svs Charge"

Remove the "Markup(%)" and "Tax" fields. User doesn't need to view/modify this field

Change to "Job Description (Optional)"

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

Add New Outside Service Charge(s)

Vendor Name  
--Select--

Job Cost

Markup(%)  
15

Tax  
No

Job Description Work Completed(Optional)

Save

Cancel

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

- 4.12.6 Change the Top Header to read "Add New Outside Svs Charge"
- 4.12.7 Add "Enter Outside Svs Charge" label ML – just text not a link, right?
- 4.12.7—

Formatted: Font: 12 pt

Formatted: Normal, Indent: Left: 1", No bullets or numbering

- 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)"