**General Feedback:**

* The notification icon on dashboard are not functional.
* "Last updated by" and “ticket created by” aspect missing for tickets, this must be incorporated.
* Option to send msg (notes) to accounts, just the way there is an option for IT for tech and client notes
* The portal should only be accessible during a person’s shift time to improve

security *(CR)*.

* Tab key for moving to the next option. eg entered PO ref, after pressing tab it should move to ticket status to increase team efficiency
* We can combine the four statuses “Cancelled Chargeable, Rescheduled Chargeable, Revisit Required Chargeable, and Completed” into one called *"Billable". (CR)*
* For Revisit Required Chargeable and Completed, we can add time logs to show how many hours were spent. (CR)
* For Cancelled and Rescheduled Chargeable, we can add a checkbox or note option to let the Accounts team know how many hours to charge the client. We can also use this to mention if we’re charging a different amount than what was agreed, so they are informed. (CR)
* Homepage should have both signup and login options. A new member can sign up on their own and on the backend an approval request can be sent to respective

manager. (CR)

* On expanding menu on the left the background screen should adjust accordingly.
* Setting button on the left menu bar is not required for IT & SD. If there is a need to keep it, it’s name must be changed. (Name suggestions: Sort by/filter by).
* Escalated status can be added to list of statuses. (CR)

**Dashboard:**

* Only team leads must have the right to assign the ticket. A member should be able to only self-align a ticket. Already assigned member can only be changed by Team lead.
* Pin option on most left (displaying columns of dashboard, technicians, projects) is not required, we can choose expand option when required to see those fields. (CR)
* Add a delete option for tickets, but it should need TL (Team Lead) approval with a reason before it’s deleted. If this is initiated the need for Duplicate status will no more be required. (CR)
* Reorder Statuses - The ticket statuses should appear as per priority of each department —for example, start with New, then Awaiting Client Confirmation, etc. (If billable status is initiated as per the suggestion mentioned in general feedback) (CR)
* Pinned tickets section must only appear if a task is pinned. Moreover the background color for pinned section must be darker to enhance visibility.
* Cannot add new team member for assigning tasks (very much required) (CR)

**Tickets:** (this section is not required, + option on dashboard will suffice (CR), however the following discrepancies have been identified in this section)

* The flexibility to choose rate type is missing i.e. hourly, half or full day rates for techs
* If client rates are already mentioned in the client section and will be automatically picked by the system once client is selected after ticket is created there is no need to keep client rate section while creating ticket. (CR)
* Only selective status must be available to respective teams for selection. e.g. status like billed should only appear to accounts team. (CR)
* When creating a new ticket, the PO# should not be filled in by default under PO Reference No. option.
* Adding address while creating a ticket - Error msg: This page can't load Google Maps correctly.
* Nearby technicians - Google maps is not working
* Unable to search techs in nearby techs
* Option to manually add tech is missing (ex techs of partners) (CR)
* Some sort of notification must appear, if tech material/travel cost is mentioned and material/travel cost for client is missing and vice versa. In case if for either of the recipient costs are not applicable there should be a default option of N/A. in case if the material/travel cost sections are left blank ticket should not save. (CR)
* Notification must appear once a tech is assigned to a ticket. (CR)
* Similarly relevant notification must pop up for any changes made to a ticket and saved.
* The GTR member field is not needed when creating a new ticket.
* Fix the spelling of “Country” shown in the City selection.
* When filtering techs by certificate, it should only show techs from the selected location, not from everywhere.
* We should not be able to select statuses like Confirmed, ACC, or Completed when creating a new ticket. These options must be available only once tech is assigned to ticket. Moreover, if schedule date is for a future date we must not be able to mark the ticket as completed. (CR)
* There’s no option to add a new end client. This should be added, only team lead should have the right to add end client to a ticket. (CR)
* Once tech is assigned, the section of nearby tech must no more appear, instead an

option to unassigned or change tech should appear. (CR)

* Uplifts are not automatically applied if scheduled date for a ticket is for OOH or WE. (CR)

**Project Section:**

* Must have a section to add end client name (CR)
* More status options for project e.g. completed, onhold should be available (CR)
* Must have a section to add date when project was commenced & completed. (CR)
* Section to add project rates must be made available. Creating an option to add document for project rates will suffice as well. (CR)

**Client:**

* Two rate options are given, client rate and hourly rate, it should be first two hours, hourly rate, addtn hr, HD, FD. (There should be a drop-down menu. If first 2 hours is selected, 2 cells must appear. One to add first 2 hours and additional hour. If half day is selected there must appear 2 cells first to enter half day rate and other to add additional hour rate. In case if Full day is elected from drop down menu only 1 cell must appear to mention full day rate. In case of hourly rate only hourly rate cell must appear.) (CR)
* No option to add rates for different levels of techs.
* OOH and WE uplift sections must have option to select days instead of dates. There must be an option to add start and end timings as well for all uplifts. (CR)
* Sunday/Holiday uplift option is missing. (CR)
* Instead of rate for uplift there must be an option of percentage only. (CR)
* The option to add/del client should only be available to specific people.

**Partners:**

* There must be an option to directly contact a partner from portal itself. As we previously had a whatsapp button incorporated. (CR)
* Only TR should be able to add partners
* A rate section similar to client should be available for partner as well. (CR)
* On opening a partner, all the affiliated engineer list must appear as well. And on clicking on their name all tech details must open (Tech remarks etc. Basically, the click must take us to the technician section of the portal). (CR)
* Option to del partners should be with limited access

**Technician:**

* Only TR should be able to add new techs
* There should be a record of the technician’s last visit with date and PO#. (CR)
* Google maps are not working, so unable to search techs by location.
* If a location is entered all other filters (distance, type) must show results for the entered location only and must not display result for all countries.

**IT:**

* unable to open ticket from dashboard
* No option to save members & status
* Add partner option is not required to IT
* Execution detail section is missing aspects like report sent to client, notes section to add any additional pointers.
* IT should not be able to assign SD members to tickets.
* Only relevant statuses & tickets must appear on IT portal on dashboard. They must only be able to see Awaiting Client Confirmation (for same day or next day schedule) Confirmed and Onsite tickets only. (CR)
* Tech preparation check mark in ticket with date and time. Once checked, no member should be able to uncheck it except for TL. (CR)

**Reports:**

* There should be filters to view reports under each section by “month, last month, or this year.”
* Option to filter reports by Client & end client (CR)
* Report must mention the duration between creation and cancellation of a ticket.
* It must also provide information like tickets cancelled after Awaiting Client Confirmation or Confirmed. (CR)
* Some SD members' reports don’t show charts or dates.
* It will be helpful if charts also download along with the table for each reporting section (CR)
* Only project team must have the option to download report in excel and pdf form. TL should be able to download reports in pdf form only. (CR)
* We should be able to open tickets directly from the reports section. (CR)
* Tech budget sheet to be reflected in portal and techs being booked on higher price is to be notified to TL. A report of same to be generated (CR)
* Reports must reflect the following information as well;
  + Total Assigned Tickets
  + Total Closed Tickets
  + Request Closed within 4 hours
  + Total Cancelled Tickets
  + Client Cancellations
  + SD Cancellations
  + TR Cancellations
  + Budget Breach - (Number of tickets for which techs are booked at a higher rate then the one mentioned in tech budget sheet) (CR)
  + Number of escalated ticket due to tech (particular due to skillset issue, or non availability of tools) (CR)
* Finance section is not functional.
* IT report must reflect the following information for relevant members
  + Total Assigned Activities
  + Completed Activities
  + Total Hours for Conducted Activities
  + Total Evaluations Assigned
  + Total Evaluations Conducted
  + Total Preparation Calls
  + Total Escalated tickets after execution (CR)

**GTR**

* Tech evaluation section can be added. instead of sharing techs on WhatsApp, it can be added on portal and IT team gets notified about it. (Same can be incorporated for evaluations between SD & IT) (CR)