Project and Promo Initiation Form

Note: The form will have trouble loading if you’re using internet explorer. Please use a more modern web browser, such as Google Chrome, Edge, Firefox, Brave, etc..

Home Screen:

A picture containing graphical user interface

Description automatically generated

The links on the home page link the project initiation, promo initiation, and the billing group forms. Just click a link to get started.

Navigating the Project Form:

1. Once loaded, you’ll have a list of managers in both the dropdowns, and a list of all active employees in the form of checkboxes. Required fields are labeled with red asterisks and/or red underlines.

Loading the names should take no longer than a minute.

Graphical user interface

Description automatically generated

Graphical user interface, chart

Description automatically generated

1. For the Start and End Date fields, you may manually type the date or click the calendar icon to click a date.

Graphical user interface, application

Description automatically generated

1. Once the page is filled out, move onto the next page by clicking the “Next” button at the bottom of the page. If the form detects that you’ve made a mistake, it will prompt you with an alert.

A green and white sign

Description automatically generated with low confidence

1. The keywords have a “Search Keywords” field that will list the keys dynamically as the user types. The keys will list starting with the first letter typed in the search field and so on. You may also ­have the option to add up to 3 other keywords.

Diagram

Description automatically generated with medium confidence

1. Other fields on the second page include Project Latitude and Longitude. You may use either a decimal format or actual coordinates. If using actual coordinates, please stick to a format like 40°47'46.26"N.
2. For the third page, I recommend waiting until the profile codes load before inputting other information. On this page, both the service agreement and retainer fields have the capability to expand an extra required field. If the user selects “Yes” on service agreement, the user will be prompted to explain why. If the user selects “Enter Amount:” on the retainer field, the user will be prompted to enter an amount.

A picture containing graphical user interface

Description automatically generated

1. The fields on those pages should hopefully be self-explanatory.
2. The final page includes a description of service field. The description of services includes an external link. This will open a separate tab on your browser to search by project number and/or description. Running a search may require waiting a few minutes due to searching the database’s massive number of previous entries. I hope to improve this functionality by making the searches much faster in version 2.

Graphical user interface

Description automatically generated with medium confidence

Graphical user interface, text, application

Description automatically generated

Table

Description automatically generated with medium confidence

1. The final page will display all your entries throughout the form for you to review. After the user reviews their input, they may click “Submit” at the bottom of the form to submit the information as they wish. Submitting the information should take less than a minute. The user should be prompted a successful submission, or if an error occurs during their submission.

Graphical user interface, application

Description automatically generated

Promo Form:

Essentially, the Promo Initiation is shorter and involves many of the same fields as the Project Initiation. One new field is called “Type of Promo”.

Add Billing Group:

1. You will first be prompted to enter a project number. Once you click “Search Projects,” It will search the database for corresponding project numbers (make sure to type the full project number).
2. If it finds a project, information includes the Project’s Number, name, manager, client name, and list of assigned billing groups. If not, the page will display “No Projects Found.” Click on “Add New Billing Group” to start adding a new billing group to the corresponding project.

Graphical user interface, text, application

Description automatically generated

1. The page should update its contents with the project’s information and some fields to fill out on the first page.

Graphical user interface

Description automatically generated

1. After you fill out the first page, click on “Next” at the bottom of the page to move onto the second page.
2. The keywords have a “Search Keywords” field that will list the keys dynamically as the user types. The keys will list starting with the first letter typed in the search field and so on. You may also ­have the option to add up to 3 other keywords.
3. Other fields on the second page include Project Latitude and Longitude. You may use either a decimal format or actual coordinates. If using actual coordinates, please stick to a format like 40°47'46.26"N.

Graphical user interface

Description automatically generated

1. Click on “Next” to move onto the next page, or “Back” to go back to page 1.

Graphical user interface, application

Description automatically generated

1. Fill out the required fields on the third page. The Description of Services field includes the same external link to search projects, as mentioned in number 7 of “Navigating the Project Form.”

Table

Description automatically generated with medium confidence

1. To type in an amount for the retainer, select “Enter Amount:” and an extra field will pop from below.

Graphical user interface

Description automatically generated

1. Click “Next” when done.
2. The final page includes a summary of everything that has been entered into the form.

Table

Description automatically generated

1. If everything looks correct, click on “Submit” at the bottom of the page.

Graphical user interface

Description automatically generated

1. If submission is successful, you will be prompted with a successful submission, and the choices to “Start Over” or “Back to Home.”

