USER DOCUMENTATION

Version 1
16/10/2022

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Introduction

1.1 Purpose and scope

The purpose of this document is to give an overview of key functions and processes implemented by this system.

The system in the document is developed by Team 49. This system is a website for First-Call conveyancing to efficiently onboard clients and reduce overall wait times for responses and better manage the information of all the onboarding forms.

1.2 Process Overview

Manage Clients:

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3. Search clients
4. Create and configure forms
5. Edit form
6. Email to clients
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Manage Website content:

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Manage Clients

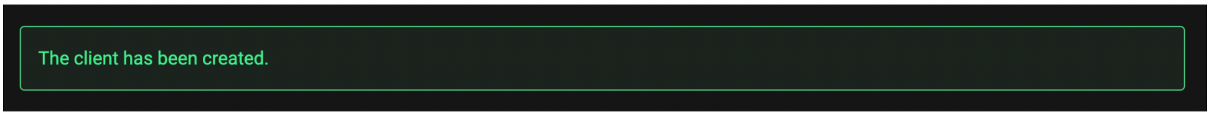
Overview

- This section is separated into two sections Create and Manage Clients and Create and Manage Client’s forms
- Create and Manage Clients will explain the processes regarding creating, updating Clients, and searching for specific clients
- Create and Manage Client’s forms will explain the processes regarding creating, previewing, editing and searching for forms.

Create and Manage Clients

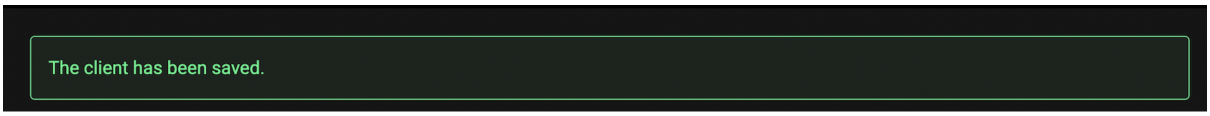
Create new client

1. Login to the system using valid credentials.
2. Click on the “**Clients''** button on the navigation bar which will take you to the clients page.
3. On the clients page, click on the “**New Client”** button on the top right to begin the process of adding a client.
4. User will see a form which asks for general information about the client.
5. Input details in the form and select the main form type.
6. Click on the **“Submit”** button on the bottom of the form.
7. Users will see a pop up message in green colour which states that the new client has been saved.



Edit clients’ information

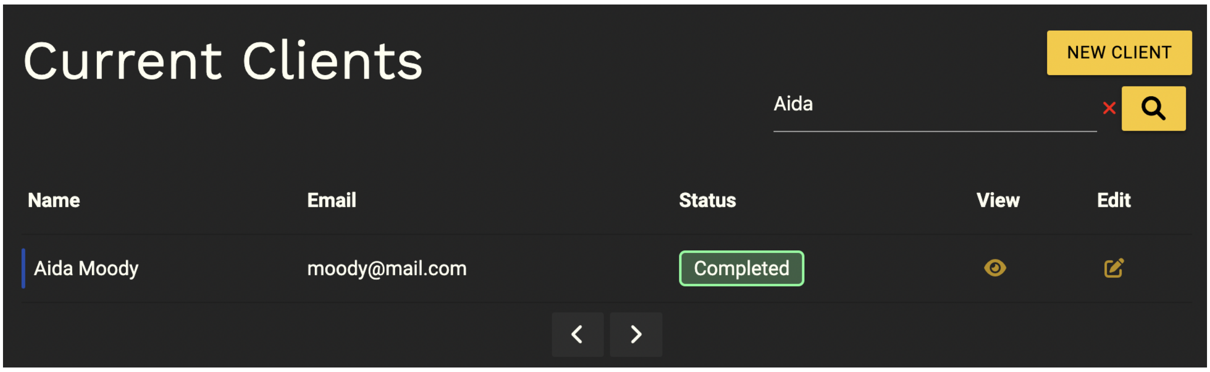
1. To edit the client’ information, go to the clients page and click the edit icon.
2. Update the client’s name and email address.
3. Click on the “**Submit**” button on the bottom of the form.
4. Users will see a pop up message in green colour which states that the client’s information has been updated.



Search clients

1. To search for a specific client, go to the clients page.
2. Type the client's relative information (name or email address) on the search bar.
   NOTE: The information input must be a part of the client's relative information, and the input only allows letters and numbers.
3. Click the search icon or press enter on the keyboard.
4. The relative clients will be displayed.

Example:

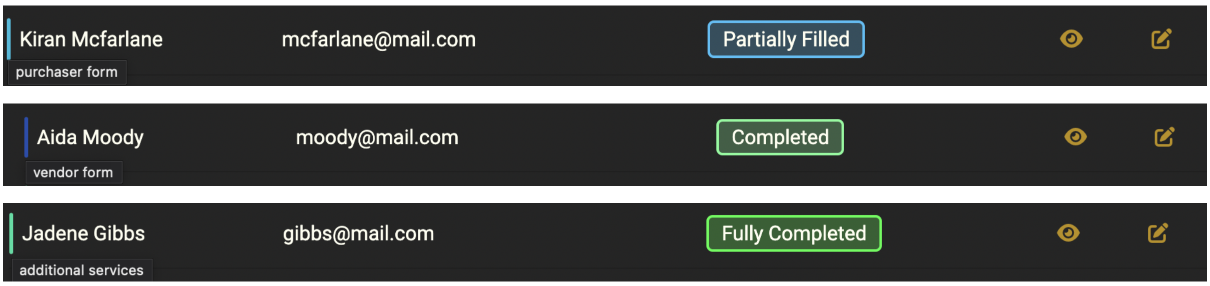


Create and configure forms

1. The client will automatically generate a main form once the client has been created.

   NOTE: Different colours represent different forms (Purchaser Form - light blue, Vendor Form - dark blue, Additional Services Form - green).

Example:



2. In the client page, user can check the status of the form

   NOTE: It is divided into 4 status with different colours in total (Fully Completed - light green, Completed - forest green, Partially Filled - blue, Awaiting Response - red)

Example:

Name	Email	Status	View	Edit
Kiran Mcfarlane	mcfarlane@mail.com	Partially Filled		
Aida Moody	moody@mail.com	Completed		
Jadene Gibbs	gibbs@mail.com	Fully Completed		
Paula Mejia	mejia@mail.com	Awaiting Response		

3. After the client finishes the main form, click on the "**View**" icon to jump to the client's view page to add a new form.
4. Click the "**Add New Form**" button on the left bottom to add the new form .

NOTE: If the client did not complete the main form, they are unable to add the new form.

Example:

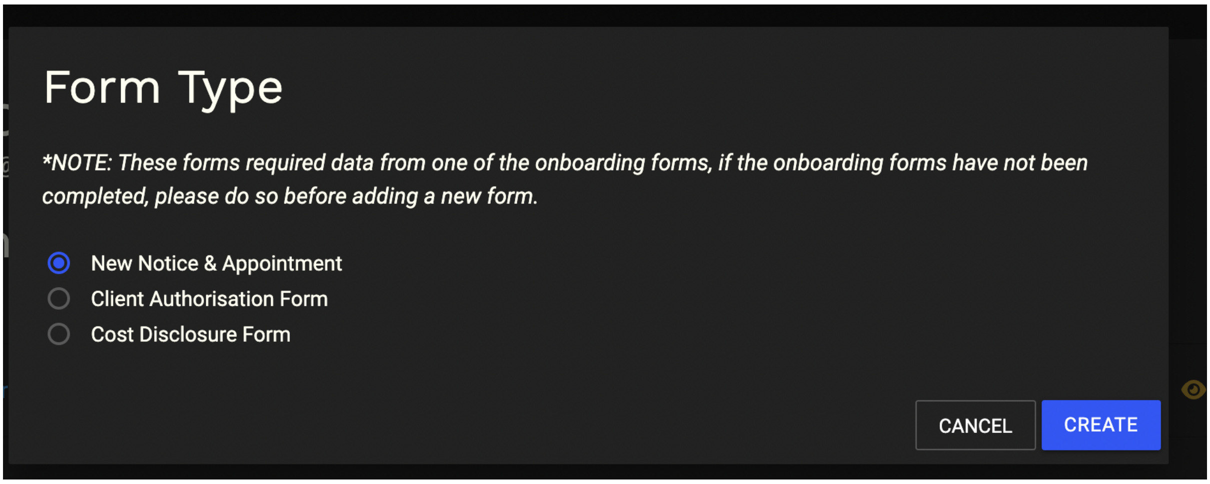
Form Type

***NOTE: These forms required data from one of the onboarding forms, if the onboarding forms have not been completed, please do so before adding a new form.**

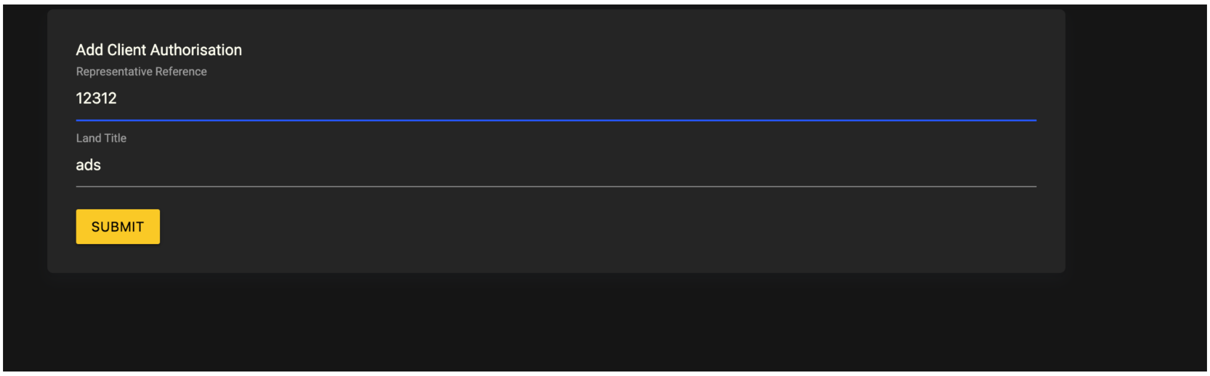
- New Notice & Appointment
- Client Authorisation Form
- Cost Disclosure Form

CANCEL

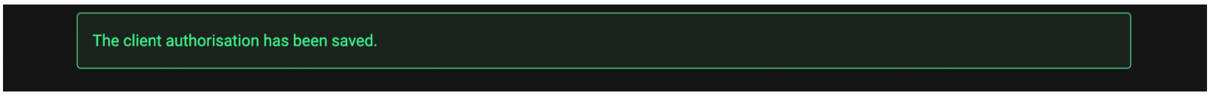
5. There are three types of the additional forms besides the main forms, some forms need some additional information to generate, you need to select the form and click the create button on the bottom.



6. After clicking the create form button, if you might redirect to a new form's additional form page to collect the information we need to generate the form, once you have completed all the information, click on the submit button.

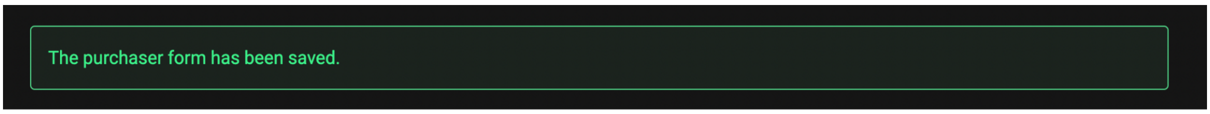


7. The new form will be created and pop up information like this:



Edit form and expiry date:

1. Navigate to the View Clients page
2. Click on the "**Edit**" icon to jump to the form edit page, user can edit the main form information.
3. The first column (expiry) of the form edit page, user can directly edit the date, the expiry date can be extended or shortened.
4. Click on the "**Update Form Expiry**" button to save the information.
5. Users will see a pop up message in green colour which states that the form has been updated.

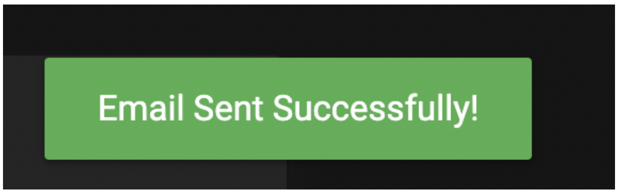


Email to clients

1. Navigate to the View Clients page.
2. Click on the "**Email**" dropdown button, there are "initial email" and "follow up email".
3. Send the "Initial email to the client to remind them to finish the form, user can click the "**Click here to view**" to jump to the form link.

NOTE: If they don't complete the form for a long time, staff will send the follow up email to remind them.

4. Click on the "**Send Email**" button on the right bottom to send the email to the client.
5. Users will see a pop up message in green colour which states that the email has been sent successfully.

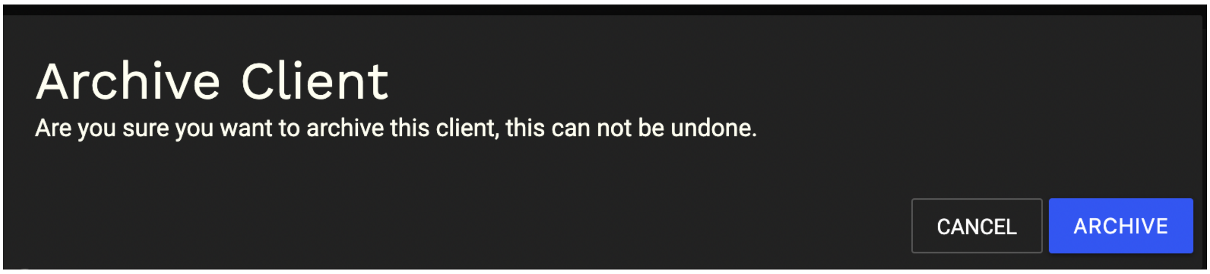


Generate clients' form in PDF

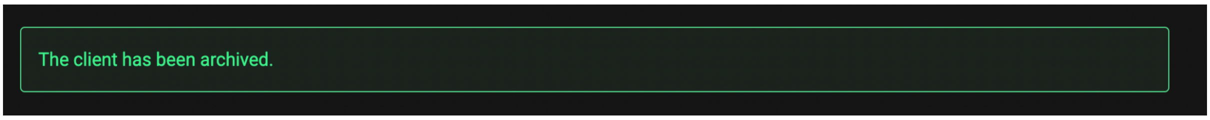
1. Navigate to the View Clients page.
2. Click on the "PDF" icon to jump to the pdf form page, users can click the "download" icon on the top right to download the pdf form.

Archive clients

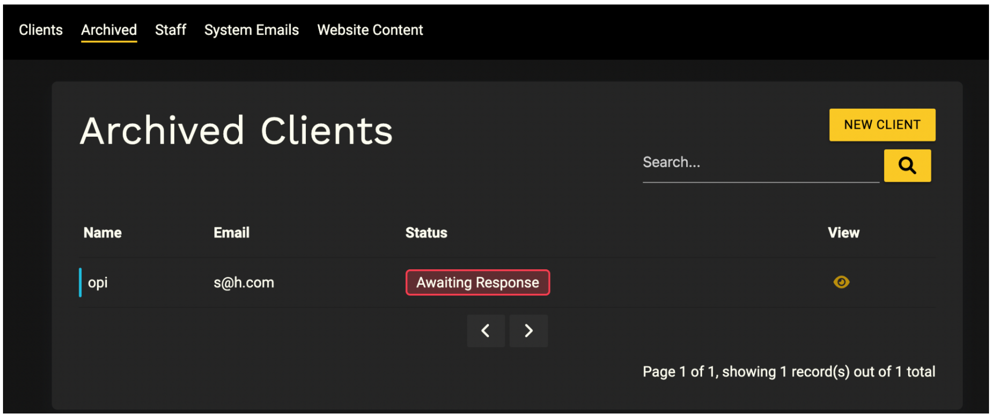
1. Navigate to the View Clients page
2. There is a "Archive Client" button on the left bottom.
3. If the client completed or abandoned all the business process, the staff can archive their information.
   NOTE: Once they click the "Archive Client" button, there is a reminder message that will show, as once archive, it cannot be undone.



4. Users will see a pop up message in green colour which states that the client has been archived.



5. And they will show in the Archived page.



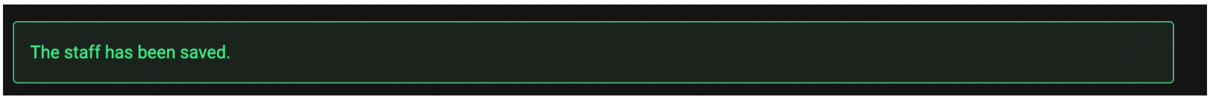
Manage Staff

Overview

- This section will explain the processes regarding managing a staff, these tasks will include creating, and updating for staff.

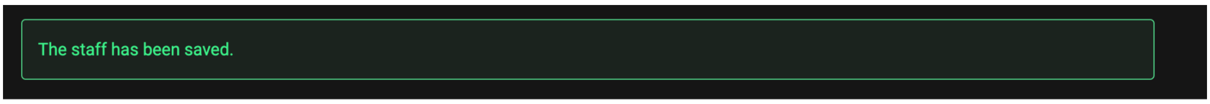
Create new staff

1. Navigate to the clients page using the **“Staffs”** link in the navigation bar to the top of the screen.
2. Click on the **“NEW STAFF”** to begin the process of adding a new staff.
3. Input the relevant personal information pertaining to the new client.
4. Click on the **yellow** “**Submit**” **button** on the bottom of the form to create a new client.
5. If all the information inputted in the correct format there is a green pop up message will show in the top of the staff page indicating that the update was successful.



Update staff’s personal information

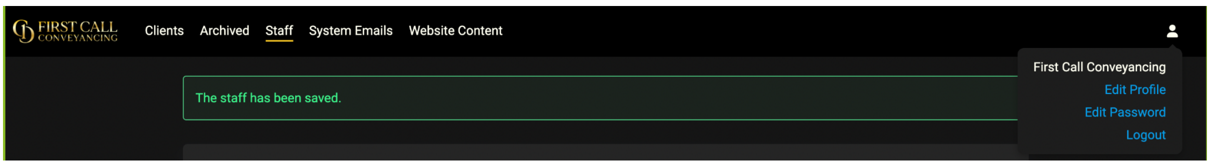
1. Navigate to the **Staff** page.
2. Click on the “**Edit**” button on the last column of the row to edit a client.
3. Once the “**Edit**” button is clicked, you will be redirected to the staff's information form.
4. You can update the new personal information.
5. Click on the **yellow** “**Submit**” **button** in the bottom of the form to save the new information.



6. If all the information inputted in the correct format there is a green pop up message will show in the top of the Staff page indicating that the update was successful.

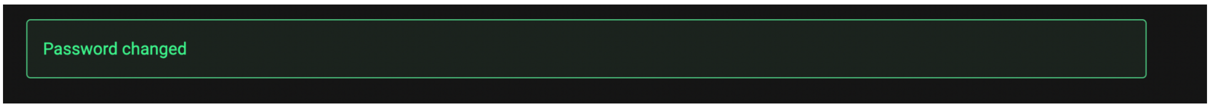
Update staff’s password

1. Click the user icon on the top left.



2. Click on the “**Edit Password**”.

3. Once the "**Edit Password**" button is clicked, you will be redirected to the current staff's password information page.
4. If all the information inputted in the correct format there is a green pop up message will show in the top of the Staff page indicating that the update was successful.



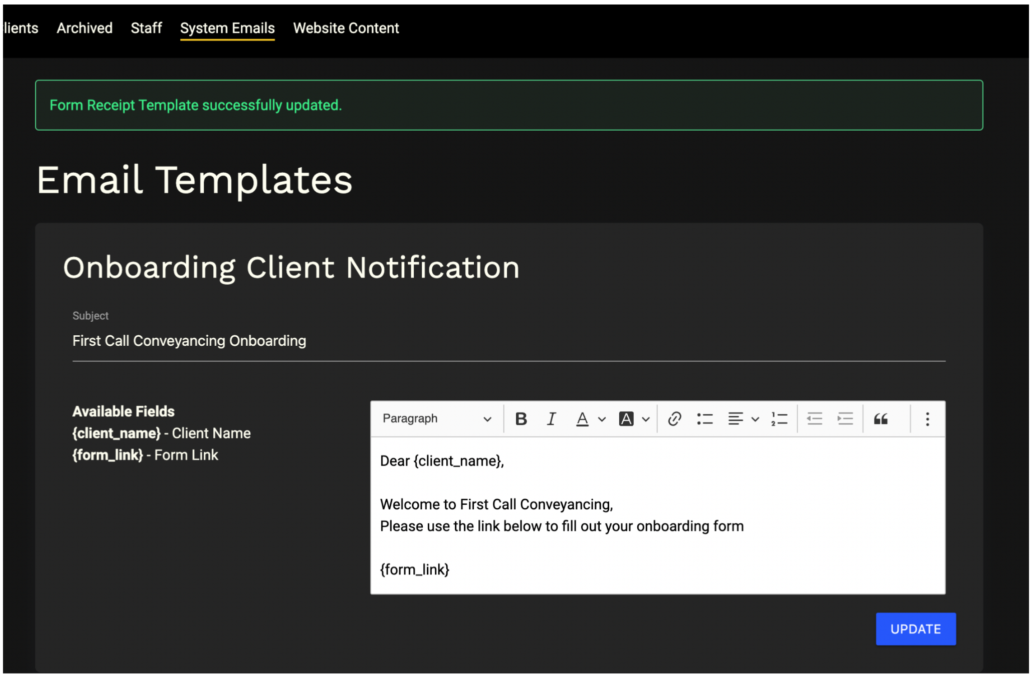
Manage Email System

Overview

- This section will explain the processes regarding updating the email systems.

Updating Template Email:

1.Navigate to the clients page using the **"System Emails"** link in the navigation bar to the top of the screen.
2.Choose the email template you would like to update, and directly change the information.
3.After edit the email, click the "**update**" button the the right bottom.
4.Once the "**update**" button is clicked, the email template will be updated and the information will pop up on the top.



Manage Website content

Overview

- This section will explain the processes regarding updating the website content

Updating Website content:

1.Navigate to the clients page using the **“Website content”** link in the navigation bar to the top of the screen.
2.Choose the content you would like to “**update**” , and directly change the information.
3.After edit the content, click the “**update**” button the the right bottom.
4.Once the “**update**” button is clicked, the website content will be updated and the information will pop up on the top.