GCA - Quote

Requirements: (Laravel based development)

- Design and Implement a quote generation process.
- Match Service Providers (SP) and Clients from the generated quotes.
- Collect payment information for external processors.
- Allow SP to Sign in/out each service call, with sign off checklists.
- Notification and email generation at each step.
- Collect performance and review metrics for providers and customers.
- Payment dashboard for SP, and clients with work, performance, and payment history.
- Admin dashboard for GCA with work, performance, outstanding and paid payment history.

Functional Requirements:

FR1: Generating a Quote for the customer:	
Req1:	Collect Zip Code and Radius of search Collect information regarding the customer space: (This will be used in **FR3**, cost calculator, number of hours) ● Rooms (Bedrooms, Bathrooms, Kitchen) ● Add-Ons (Stove, Oven, Microwave, Cabinets, Other such as fireplace, jacuzzi, etc.
Req2:	Collect information regarding adds ons, based on space selection (Req1) (This will be used in **FR3**, cost calculator, number of hours) ● Cabinets ● Inside appliances, etc. ● Windows ● Kitchenette ● Basement ● Additional Items added as needed.

Req3:	Collect scheduling Information (When does the client need this service (Req1, Req2) and how often?
	● When:
	  ○ ASAP, (Date and Time)
	    (Wish list: If not asap, collect at least two prefered date/times)
	  ○ Future (Date and Time)
	  ○ Cleaning Location?
	● How Often:
	  ○ Once
	  ○ Weekly
	  ○ Bi-Weekly
	  ○ Monthly?
	  ○ Schedule any other frequency

Req4:	Any other relevant information about the space and occupants: - Any Pets (for allergies) - Any Hazards () - Any restrictions () - Special Needs (mobility etc.)
Req5:	Collect any other comments from the customer. Free form text, length of 200?
Req6:	Collect coupon code or any promotions. (Link to cost calculation **FR1.Req7**)
Req7:	Give a cost range estimate, actual dollar amount based on the number of hours above (from **FR1.Req1, FR1.Req2**) and the hourly rate of providers. (pull info from **FR3**, cost calculator) - Customers can add hours as needed in half hour increments, resulting in an update to the cost estimate. - Also show the **average rate per hour, or average cleaning cost for the customers zip code**.

FR2: Matching Customer to Service Provider and Scheduling: (Dependant on FR1)	
Req1:	Pull all relevant cleaning quotes/specifications from **FR1.** (For rescheduling, from the customer dashboard, pull all relevant information regarding the scope of work, location, etc.)
Req2:	Match cleaners (background checked cleaners only) that serve that zipcode (**FR1.Req1**) and/or radius (**FR1.Req1**) - Default keyword for this service would be "cleaning", "home-cleaning") - Wishlist, when more services are offered though GCA, such as carpet cleaning, pressure washing. ozone treatment, sanitizing, etc. more keywords will be added. - These customer keywords will be used to match the keyword with the services performed by the various providers to match clients/providers. - Providers will select the service keywords based on the services they can provide. (**FR4**)
Req3:	Show the list of cleaners with the "Rate" (from **FR1.Req7**), along with "Reviews/Rating", "Distance". - The list should be sortable on the following, - Rate - Reviews/Rating - Distance
Req4	- Add Cleaning Location (Specific address, cleaning location for GPS coordinates) - Collect Payment Information. (Whatever the billing processor requires) - A new job/project is create in GCA's platform for both CCs and SPs

<u>Req5:</u>	**<u>Req5.1:</u>**
	Let the customer select the provider. Confirm date/time (from **FR1.Req3**), and final cost estimate, and any other details. (Full estimated sum will be authorized)
	
	- In case your selected provider is NOT available are you willing to proceed with the next available provider OR are you willing to reschedule the service with your provider of choice?
	
	Scenario 1: Customer select a specific Provider:
	   ● Send a job to the SP.
	      ○ Customer job request is sent (email, text, push notification for the app) to the selected provider for confirmation.
	      ○ The provider confirms the job.
	         ■ There will be a hard time limit, within 180 minutes. (adjustable feature in the system)
	      ○ If the job is confirmed, send an email notification to the client stating they have a message in the GCA's dashboard. Provide SP's contact info in GCA's dashboard.
	         ■ Contact info is Google Voice to Twilio number (or any other redirect 3rd party platform)
	
	Scenario 2.1: Client selected to go with the *any available provider*
	   ● GCA beams (email, text, push) the job to all cleaners servicing the area and matches the first cleaner that accepts (in the dashboard) the job.
	
	Scenario 2.2: Client selected to *reschedule* with their provider of choice
	   ● Client is redirected to GCA's message board and provides alternative date/time to reschedule
	
	~~Scenario 2: Provider CAN NOT CONFIRM or is UNAVAILABLE:~~
	   ● ~~Send a notification email to the client asking them to check their Messageboard in GCA. (Full estimated amount will be authorized credit card authorization should be done at this point)~~
	      ○ ~~Customer job request is sent to the selected provider for confirmation. There will be a hard time limit, within 20 minutes.~~
	      ○ ~~The provider now **CAN NOT** confirm that they are available.~~
	      ○ ~~Email the client that the provider is unavailable and give them the following options:~~
	         ■ ~~*Schedule next available SP* (service provider). Preferred option would be to encourage the client to send the job to all available providers that can meet the clients requested date/time selection.~~
	            ● ~~If selected, the job is beamed to all providers. (Cost estimate should be below what was quoted to the client)~~
	            ● ~~The first provider that confirms, gets the job.~~
	         ■ ~~*Schedule the same provider* for a different date/time.~~

- Third option, client decides not to do anything, revert authorization, and send out email apologizing for inconvenience.

Req5.2:
Customer doesn't care, *ASAP cleaning*.

- GCA beams the job to all cleaners servicing the area and matches the first cleaner that accepts the job.
    - At acceptance, a full estimated amount will be authorized. Credit card authorization should be done at this point).
    - A new job/project will be created for CCs & SPs
- If the job is confirmed, send an email notification to the client stating they have a message in the GCA's messageboard. Provide SP's contact info in GCA's message board.
    - Contact info is Google Voice to Twilio number (or any other redirect 3rd party platform)

FR3: Cost Estimate Calculator	
Req1:	Pull all relevant cleaning quotes/specifications from **FR1.**

Req2:	For rate calculation, GCA should be able to turn this feature on/off.
	• GCA default rates.
	• Provider custom rates
	    ○ Each Service Provider profile will have the following information linked to their profile for rate calculations. (Default values for those SP, who don't provide custom rates)
	
	        • Hourly Rate: $25 (default)
	        • Each Room - 30 mins
	        • Each Full Bathroom - 1 hour
	        • Each Half Bath - 45 Minutes
	        • Each Item - 30 min
	            ○ Stove
	            ○ Microwave
	            ○ Jacuzzi
	            ○ Fireplace
	        • Laundry per load - 2 hours
	        • Windows Glass Inside Only, Each window - 10 mins
	        • Glass Double Door - 20 mins
	        • Inside Cabinets - 1 hour
	        • More fields as needed.

FR4: Executing Project (Work Order)

Req1:	Add job in SP's Google calendar (or send ics appointment links for multiple calendar services)
Req2:	Email / text / push 1 hour in advance reminder to SP & CC

Req3:	Upon arrival SP clock ins (timestamped, "I have arrived") in the job page on their dashboard.
	● For mobile application, future dev
	  ○ SP location will be verified via the app for the job site.
	  ○ The data needs to be fetched to GCA's platform. For potential safety and police reporting concerns (stealing, aggression, vandalism, etc)

Req4:	Upon completion of the job,
	
	Service Provider:
	SP sign-out (timestamped), similar to the signin page on the dashboard.
	● SP will use the checklist to sign out and close out the job.
	  ○ Checklist questions: (one page, quick completion)
	    i. All requested services performed? (pull selected services from quote)
	    ii. Did you remove all cleaning supplies / trash from the site?
	    iii. Any job relevant notes? (Only shown to GCA and this SP)
	● Send email (notifications) to the client.
	● Close out the job in the SP dashboard. (Job Completed)

Req5:	For mobile app: ● SP's status will change to ("I have left the job site") under the Job Profile page, and job status updated to job completed. ● SP's geo location will be tracked to verify.

Req6:	**Cleaning Customer:**
	
	● The CC will be asked to review the SP and rate/share their experience.
	  ○ Was the service completed: Yes/No - Submit
	  ○ Collect Review/Feedback. Review is public, feedback is for GCA.
	● Customers are asked to submit a review/completion survey - which is posted in SP's profile page.
	  ○ SP is not able to see CCs review until they submit their own review about CC
	  ○ SP is able to comment back to CCs review (only 1 time)
	  ○ SP is able to change their review later on
	● Survey is triggered by SP asking to review/rate CC. (Only shown to SPs for now)
	
	● Customer is able to "tip" SP, optionally. (Entire tip goes to the SP)
	● Show the final amount to the customer, and update the amount for the

	payment processor. ● Close out the job in the CC dashboard, filed under history or past jobs. (Job Completed)
Req8:	Money is released to SP in X amount of days after successfully completing the service. (Update dashboard to show payment status.)

FR5: Dashboard (SP, CC)

Req1:	Service Providers:
	
	    ● Rate Calculation:
	      ○ Hourly Rate : $25 (Default rate, allow to change)
	
	      ○ Editable fields for rate calculation: **DEFAULT VALUES SHOWN BELOW** (Changes limited to twice a year, or TBD)
	        ■ Each Room - 30 mins
	        ■ Each Full Bathroom - 1 hour
	        ■ Each Half Bath - 45 Minutes
	        ■ Each Item (stove/microwave/jacuzzi/fireplace) - 30 min
	        ■ Laundry - 2 hours
	        ■ Doing Dishes - 1 hour
	        ■ Windows Glass Inside Only - 2 hours
	        ■ Inside Cabinets - 1 hour
	        ■ More fields as needed.
	
	    ● Jobs:
	      ○ Active Jobs:
	        ■ Sign-In when arriving at site.
	        ■ Scope of Work, extra services requested.
	        ■ Sign-Off when leaving.
	        ■ Checklist Page (FR4: Req4)
	      ○ Upcoming Jobs:
	        ■ Date and Time (Add to calendar Link)
	        ■ Client Info (TBD) and Location. (Navigation Links)
	        ■ Hours Requested.
	        ■ Scope of work.(Printable PDF or other format)
	        ■ Payment Amount.
	
	      ○ Past Jobs:

	■ Date, Time, and Location ■ Hours Worked and Payment Amount.

Req2:	Cleaning Customer:
	    ● Jobs:
	        ○ Active Jobs:
	            ■ Review Cleaner.
	            ■ Add Tip and close out (optional)
	        ○ Upcoming Jobs:
	            ■ Date and Time (Add to calendar Link)
	            ■ Cleaner Name and Contact Info. (TBD)
	            ■ Hours Requested.
	            ■ Scope of work.(Printable PDF or other format)
	            ■ Payment Amount.
	
	        ○ Past Jobs:
	            ■ Cleaner Name, Review and Info for rescheduling. (Method for rescheduling) (NO CONTACT INFO.)
	                ● Job/Cleaner Specific notes.
	            ■ Final Payment Amount. (Tip, etc.)

Req3:	Admin (GCA):
	    ● All Jobs: (based on Status)
	        ○ Active: Ongoing active Jobs
	        ○ Requested: Client requested, currently unconfirmed/unmatched by SP.
	        ○ Confirmed / Assigned: Client requested, confirmed by SP.
	        ○ Canceled: Client or SP cancelled jobs.
	        ○ Completed: Finished jobs.
	        ○ Disputed: Transitional status, manually moved to cancelled or completed after GCA decision.
	
	        ○ Information needed for all above Jobs:
	            ■ Requested Date and Time
	            ■ Cleaner Name and Contact Info.
	                ● Requested cleaner, or GCA assigned.
	            ■ Hours Requested.
	            ■ All Client Info and Location.
	            ■ Scope of work.(Printable PDF or other format)
	            ■ Payment Amount.
	                ● Payment method and information.
	                ● Date processed and paid/refunded.
	            ■ All and any other relevant job information (Added as needed)
	    ● Manage Reviews.
	        ○ List of reviews if linked to each job.
	            ■ Hide, Edit, Post, Change reviews.

	● Background information for the SPs

General Reqs: Misc.	
Req1:	SPs scoring system **top provider**(0-100%): ● Based on reviews SPs scoring system **Pro** ● Based on length on GCA's platform ● Based on the amount of money earned on GCA's platform
Req2:	Email CC CTA (call to action) to schedule "recurring" cleaning services

(Future Items)
Account Creation (Clients: : ALREADY IN PLACE IN PMP Pro)
Themes and Colors should be uniform throughout.

Account Creation (Service Providers: ALREADY IN PLACE IN PMP Pro)
- Under SP Profile, flag (date, renew every year?) everyone at account creation for background check.
- Mark check complete if the background check comes clear from outside company (NEED TO PICK). Only background check, marked cleaners will be used in matching SP/CC services.

Calculation Formula (for Req1, Req2) - Customizable fields for future change.
Minimum - 2 hours (includes 1 item + 1 hour of travel time)
Each Room - 30 mins
Each Full Bathroom - 1 hour
Each Half Bath - 45 Minutes
Each Item (stove/microwave/jacuzzi/fireplace) - 30 min
Laundry - 2 hours
Doing Dishes - 1 hour
Windows Glass Inside Only - 2 hours
Inside Cabinets - 1 hour

Hourly Rates
Baltimore Metro Area - $25 (defined by the SP's)
Booking fee - 5%

Example: https://www.dazzlingcleaning.com/

DAZZLING CLEANING

1. Pick a Date   2. Book a Cleaning

Pick a date & time

◉ Show all dates & times

○ Only show Yocaira's, Enoc's & Claudia's
   preferred times

Date	Start time
03/12/2021	1:00 PM ⌄

🕐 See recommended hours

–	Duration 3 hrs	**+**

Zipcode
20814

Email address
jon@shmo.com

Voucher Code (optional)

See Cleaner Availability   ❯

🔒 All cleaners have passed a comprehensive background check & maintain a verified
profile with past reviews & transparent prices.

Care.com

Find trusted caregivers for your every need

To get started, choose an option:

‹ Back

Tell us what your housekeeper should know about your home.

How many bedrooms and bathrooms?

— 2 +   — 2 +
Bedrooms   Bathrooms

What should your housekeeper bring?

☐   ☐
Supplies   Equipment

Next

USA TODAY   mom.com   FORTUNE   REAL SIMPLE   CNBC   Bloomberg