# Phase 2 Servman.Net application

## Technical requirements

1. Support for multiple companies
2. Web based
3. Integrates with Salesforce.com and Intuit Market Place
   1. Works as federated in Intuit Market Place
   2. Integrates with QuickBooks data
   3. Integrates leads from sales force
4. Configurable and customizable
   1. Ability to add custom fields
   2. Ability to add custom flows
5. Extendable
   1. Supports basic functionality that can be extended for different vertical markets.
6. Service oriented.
   1. Our client Gui will talk to the same services as any third party gui. Ability to write diffirent gui interfaces in different technologies (Flash, Silverlight, Winforms, Ajax, Iphone)
   2. Services are delivered and documented as part of the application. JSON, REST or SOAP.
7. Secure
   1. Strong security over the internet and hosting security
8. Ability to process Credit cards
9. Relational DB (SQL Server vs Mysql). Abilty to run it again either MYSQL or SQL server without code changes
10. Nice reporting system. Ability to generate reports in Word, PDF, Excel
11. Ability to customize reports easily

## Basic system business requirements (Release 1. System is shown to customers on IPP and Sales Force market places. Sales efforts begins) (Jan 2011. Prototype Oct 2010 shown to Intuit)

### Setup and Configuration

1. Import data from QB and guide user to setup their business company
2. Setup mapping between our data and Qb Data
3. Manage technicians( What services they can do)
4. Manage technicians hours of operations
5. Manage services

### Leads

1. Allow lead to come from the internet
2. Show lead sources

### CSR

1. Create new visit
   1. Support time windows
   2. Services
   3. Pricing
2. Answer customer on her status, history

### Dispatcher

1. Create work day
   1. Set technicians and appointments
   2. Confirm, Dispatch, Arrive, Complete and Undo’s, ETC, Cancel, Rework
   3. See technicians on the map
   4. Manage Inventory
   5. Take a payment

### Technician

1. Receive a job, update status, (Arrive, compete, cancel, ETC)
2. Take a payment

### Accountant

1. Review completed transactions, create invoices, sync them into QB
2. Review payments, sync to QB
3. Attached scanned paper work to the project

### Business Owner

1. Super cool dashboard on the web and iPhone
2. Ability to customer and may be create new dash board elements

## Restoration specific module (Feb 2010. Dalworth Restoration moves to use new web based system)

1. Job costing
2. Integration with Exactimate
3. Ability to track monitoring results

### Oriental Rug Cleaning Specific Module

## Carpet Cleaning Specific module (Release 3 Dalworth Carpet Cleaning starts using the system)

1. Pricing using areas
2. Capacity calculation
3. Specific reports

### Smart Schedule

Integrate smart schedule recommendations into application.

1. Ability to mark process of cleaning rugs
2. Attach photos of rugs to jobs