Global Level / Admin Parameters:

       Set up Properties

       Set up General Contractors

       Set up Sub Contractors

       Set up Users

       Set up Stage Status

       Set up Pricing / Paying Categories

Set up Properties

- Job site Name and address
- Billing Name and address
- Billing Terms
- Property Manager name/email address/phone number – 3 possible
- Maintenance Manager name/email address/phone number – 3 possible
- Assign the General Contractor from drop down list of parameters above
- GC Manager name/email address/phone number – 3 possible
- Fill in pricing schedule for billing / paying (Fill out $ value to Pricing / Paying Categories set-up in Global/Admin parameter list.)
- Each property would have a dashboard that would display certain information and be sorted by certain information. (ie Apt#, Status, Sub-Contractor)
- Design the layout of the property; add the floor number or building number first; within those add the unit numbers.
- Within each unit number, define the size.
    - So, if we say unit number 101 is a 5 bedroom, I would like the program to add 6 parts underneath the unit number; the parts will always be unit#common, unit#bed 1, unit#bed 2, unit#bed 3, unit#bed 4, unit#bed 5. If we say the unit is a 2 bedroom, the program should add 3 parts underneath the unit number; unit#Common, unit#bed1, unit#bed 2.
    - Select Stage Status from drop down list of parameters above.
    - Over-Ride Rates – Yes or No. If yes, this would **only** be edited or seen by ADMIN user. Bring up the same table as in Global Parameters with ability to change or add to. This can be at entire unit level or any part of that unit.
    - Transfer Unit – Yes or No. If yes, we need to change the color or highlight somehow to know those units take priority. This can be at entire unit level or any part of that unit.
    - Repairs Needed – Yes or No. Default to No. If yes, need ability to enter a repair #, repair size and assign a sub-contractor from drop down list of parameters above. This can be at entire unit level or any part of that unit. (There can be an unlimited number of repairs – Repair size should be by sq foot)

- Carpet Clean – Yes or No. Default to No. If yes, need ability to assign a sub-contractor from drop down list of parameters above. This can be at entire unit level or any part of that unit.
- Full / Partial Paint – Always default to Full - ability to change to partial. Need ability to assign a sub-contractor from drop down list of parameters above. This can be at entire unit level or any part of that unit.
- 100% Baseboards & Doors – Yes or No. Default to No. If yes, need ability to assign a sub-contractor from drop down list of parameters above. This can be at entire unit level or any part of that unit.
- Accent Wall – Yes or No. Default to No. If yes, need ability to assign a sub-contractor from drop down list of parameters above and ability to enter how many. This can be at entire unit level or any part of that unit.
- Ceiling Painted – Yes or No. Default to No. If yes, need ability to assign a sub-contractor from drop down list of parameters above. This can be at entire unit level or any part of that unit.
- Wall Color Change – Yes or No. Default to No. If yes, need ability to assign a sub-contractor from drop down list of parameters above and ability to enter how many? This can be at entire unit level or any part of that unit.
- Front Door Painted - Yes or No. Default to No. If yes, need ability to assign a sub-contractor from drop down list of parameters above. This will be at unit level only.
- Paint Call-Back – Yes or No. Default to No. If yes, need ability to assign a sub-contractor from drop down list of parameters above. This can be at entire unit level or any part of that unit.
- Tub Resurface – Yes or No. Default to No. If yes, need ability to assign a sub-contractor from drop down list of parameters above. This will be at bed parts only.
- Tile Resurface – Yes or No. Default to No. If yes, need ability to assign a sub-contractor from drop down list of parameters above. This will be at bed parts only.
- Bathroom Countertop Resurface – Yes or No. Default to No. If yes, need ability to assign a sub-contractor from drop down list of parameters above. This will be at bed parts only.
- Kitchen Countertop Resurface – Yes or No. Default to No. If yes, need ability to assign a sub-contractor from drop down list of parameters above. This will be at common parts only.
- Cleaning Vendor - Need ability to assign a sub-contractor from drop down list of parameters above. This can be at entire unit level or any part of that unit.
- Deep Clean – Yes or No. Default to No. If yes, need ability to assign a sub-contractor from drop down list of parameters above. This can be at entire unit level or any part of that unit.
- Trash Bag Clean Out – Yes or No. Default to No. If yes, field to enter how many? If yes, need ability to assign a sub-contractor from drop down list of parameters above.
- Clean Call-Back – Yes or No. Default to No. If yes, need ability to assign a sub-contractor from drop down list of parameters above. This can be at entire unit level or any part of that unit.
- A history of each action taken on each unit # needs to be stored and displayed.

- A history of each action taken on each unit # part needs to be stored and displayed.
- Need ability to add photos and or comments to any of these areas.

Set up General Contractors

- This would just require Name, Address, Phone Number, Tax-ID number and Logo. These would appear in a drop-down list from the Property Setup.

Set up Sub-Contractors

- This would just require Name, Address, Phone Number, and SS number. These would appear in a drop-down list throughout the stages. Ability to upload and attach copy of W-9 if possible?

  Ability to assign a status to the Sub's – Ie….Active / In-Active / Do Not Use. Only active sub's can be assigned to units / parts.

  Each time a sub-contractor is assigned a unit/part, would like them to receive a text message that would require a response of Accept or Decline. If no answer is received, we should assume a decline and indicate that the unit needs to be re-assigned. Maybe change color? Ideas?

Set up Users

- As discussed before. 4 different types of users that will mainly control what they can and cannot do. Each one would obviously have a user ID and Password.
    - ADMIN – Ability to do all things. Only user that can access/edit all 6 Global Parameters level.
    - Office User – Ability to access/edit the first 3 Global Parameters settings. (Set up Properties, GC's and Subs). They can see ALL properties. No ability to see Users, Status or Pricing other than when displayed in drop down list throughout the program.
    - Apartment Manager – Able to see **their** property and changes status or add notes or photos and give signature approval when necessary. No ability to edit any of the 6 Global Parameters. No ability to see anything except the property units/parts.
    - Sub-Contractor – Able to see **their** properties only and **their** units only. They can change status or add notes or photos.

Set up Stage Status

- Just need to set up a listing of stages to be displayed in a drop-down list throughout the stages. For each stage, I would like a parameter that says if I need ability for sign-off. If answered yes, any time that status is in effect, it should provide a field for the managers to enter their Signature/approval. That approval signature(s) would all create a history entry for the unit.

  The following is what I am intending at this point:
    - Do Not Turn

- Assigned by Property
- Repairs Needed
- Pending Repair Authorization by Property
- Pending Completed Repair Approval by GC
- Pending Completed Repair Approval by Property
    - Once this is complete, it should flag that ready for repair bill/pay.
    - Once Billed, change status to billed
    - Once Payed, change status to payed
- Ready for Carpet Cleaning
- Pending Completed Carpet Approval by GC
- Pending Completed Carpet Approval by Property
    - Once this is complete, it should flag that ready for carpet bill/pay.
    - Once Billed, change status to billed
    - Once Payed, change status to payed
- Carpet Callback
- Ready for Paint
- Pending Completed Paint Approval by GC
- Pending Completed Paint Approval by Property
    - Once this is complete, it should flag that ready for paint bill/pay.
    - Once Billed, change status to billed
    - Once Payed, change status to payed
- Paint Callback
- Ready for Clean
- Pending Completed Clean Approval by GC
- Pending Completed Clean Approval by Property
    - Once this is complete, it should flag that ready for clean bill/pay.
    - Once Billed, change status to billed
    - Once Payed, change status to payed
- Clean Callback
- 100% Complete
    - Once in this status, it should lock that unit/part, maybe change to a different color to identify completed. Only ADMIN can change out of this status.

Set up Pricing / Paying Categories:
- I am envisioning a table format at this point. This will be effective for the whole property but can have an over-ride at the unit/unit part level. Typically, the only items that would be added would be different types of repairs. Would need ability to add the repair description, billing rate and the paying rate. Also may need to subtract a callback fee from the original painter and/or cleaner.

	Billing Rate:	Paying Rate:
Sheet-Rock Repairs:	$_____ sq ft	$_____
Carpet Cleaning Common:	$_____	$_____
Carpet Cleaning Bed:	$_____	$_____

Full Paint Common:	$_____	$_____
Full Paint Bed:	$_____	$_____
Partial Paint Common:	$_____	$_____
Partial Paint Bed:	$_____	$_____
100% Baseboard/Doors Common:	$_____	$_____
100% Baseboard/Doors Bed:	$_____	$_____
Accent Wall:	$_____	$_____
Ceiling:	$_____	$_____
Wall Color Change:	$_____	$_____
Front Door:	$_____	$_____
Paint Callback:	N/A	$_____
Tub Resurface:	$_____	$_____
Tile Resurface:	$_____	$_____
Bathroom Countertop:	$_____	$_____
Kitchen Countertop:	$_____	$_____
Cleaning Common:	$_____	$_____
Cleaning Bed:	$_____	$_____
Deep Clean:	$_____	$_____
Trash Bags:	$_____	$_____
Clean Callback:	N/A	$_____