Develop Python Web Application

We require a skilled Python Developer (or team) to create a Web Application for an Australian Business.

The application is for the Paraplanning Industry to manage the development of Statements of Advice (SoA's).

We want the application to be built and hosted on the Google Cloud Platform possibly using Google Cloud SQL.

You may use Django or another development framework.

It serves 2 main purposes..a data repository and a workflow system. We are also developing another tool (an automated document creator) and this will be integrated with the new Web Application.

This is a relatively complex application and we do not want to post a full spec here as we want to work with the chosen developer to further develop the spec. We will provide screen mock-ups and other details to the chosen developer.

Because you do not have a full spec available, we understand that any bid provided may need to be adjusted. We expect that initially there will be approximately 1 weeks work to refine and develop the spec and agree on a full project cost so please include this time in your initial bid.

Users of the Application

There are 3 main users groups for the application:

1. Financial Advisers - These are the customers and they order SoAs for their clients. They use the application to place orders (for SoA's) and to track the progress of orders.

2. QPP - This is our team who primarily use the application to manage the production of SoA's

3. Paraplanners - These are the people who create the SoA's. This can include QPP staff or external contractors.

Key Functionality

Here are the key functions that each of the user groups requires in the application. There will be other required functionality as well which we will work through with the chosen developer.

Financial Advisers:

Function	Description
Register	Register online to add the Adviser Business as a User
Place an Order	Using the Order form which includes ability to upload multiple supporting documents
Approve Order Agreement	When the adviser submits an order QPP creates an Order Agreement OA (in the application) which summarises the order and the cost. The FA can then approve the OA
Purchase Credits	Purchase credits online (integrate with Braintree Payments). Credits are used to purchase SoA's. Full purchase history needs to kept.
View Order Progress	See all orders in process, including due date and time of completion
Manage Users	Add edit and delete users for their own business. Ability to reset passwords.
View Transaction History	Shows history of credit purchases and usages with ability to select different date parameters for report.

QPP:

Function	Description
Manage Users	Manage the paraplanners registered in the system, add edit, delete and also suspend
Manage System Settings	This includes changing the settings or things like SoA Cost, the settings for jobs being added to the queue, the settings for monitoring the progress of an SoA
View Adviser Credits	View a list of credits in each adviser business and also add credits manually
Manage Advisers	add, edit, delete or suspend advsiers

Add Credits	Manually add credit to a Financial Adviser
Add Job to Queue	Allocate a job to the queue where registered paraplanners can pick up the job
Allocate Job	Allocate a job to a chosen paraplanner
View Jobs in progress	See a list of all jobs in progress along with the status of the job.
View reports	View a list of management reports

Paraplanners

Function	**Description**
Manage Profile	Change profile data including bank account (where we pay them for work done) and reset password
View Job Queue	View available jobs
Claim a Job	Claim a job from the queue
Update job status	Check off progress as they work through a job...this enables us to see the progress of a job
View Job History	View past jobs including payment history
Send message	This is an area where they can request information or clarification to a job they are working on. This message should auto generate an email to the financial adviser based on a template we provide. The financial adviser needs to be able to respond to the message.
Hand Over a Job	If the paraplanner is unable to complete a job or is only working on key parts of the job they can then hand it over...either the job goes back in the queue or it is automatically allocated to another paraplanner

The Data

The data involved for each client can be quite complex...with potentially 100s of fields.

We need a database structure that contains all the required fields. A list of fields will be supplied.