

TASKBOARD CUSTOMIZATION

[PHASE-1]

TaskBoard Customization

Update Basic TaskBoard Features and Functions

- Integrate TaskBoard to Partner Dashboard
- Calculate Partner Dashboard KPI Metrics
- Add Pipeline DealFlow Sub-Total to each Container
- Integrate bizVAULT Features and Functionality
- Add Comments to TaskBoard
- Add eMail Support to TaskBoard
- Add Other Features/Modifications (TBD)

TaskBoard Details

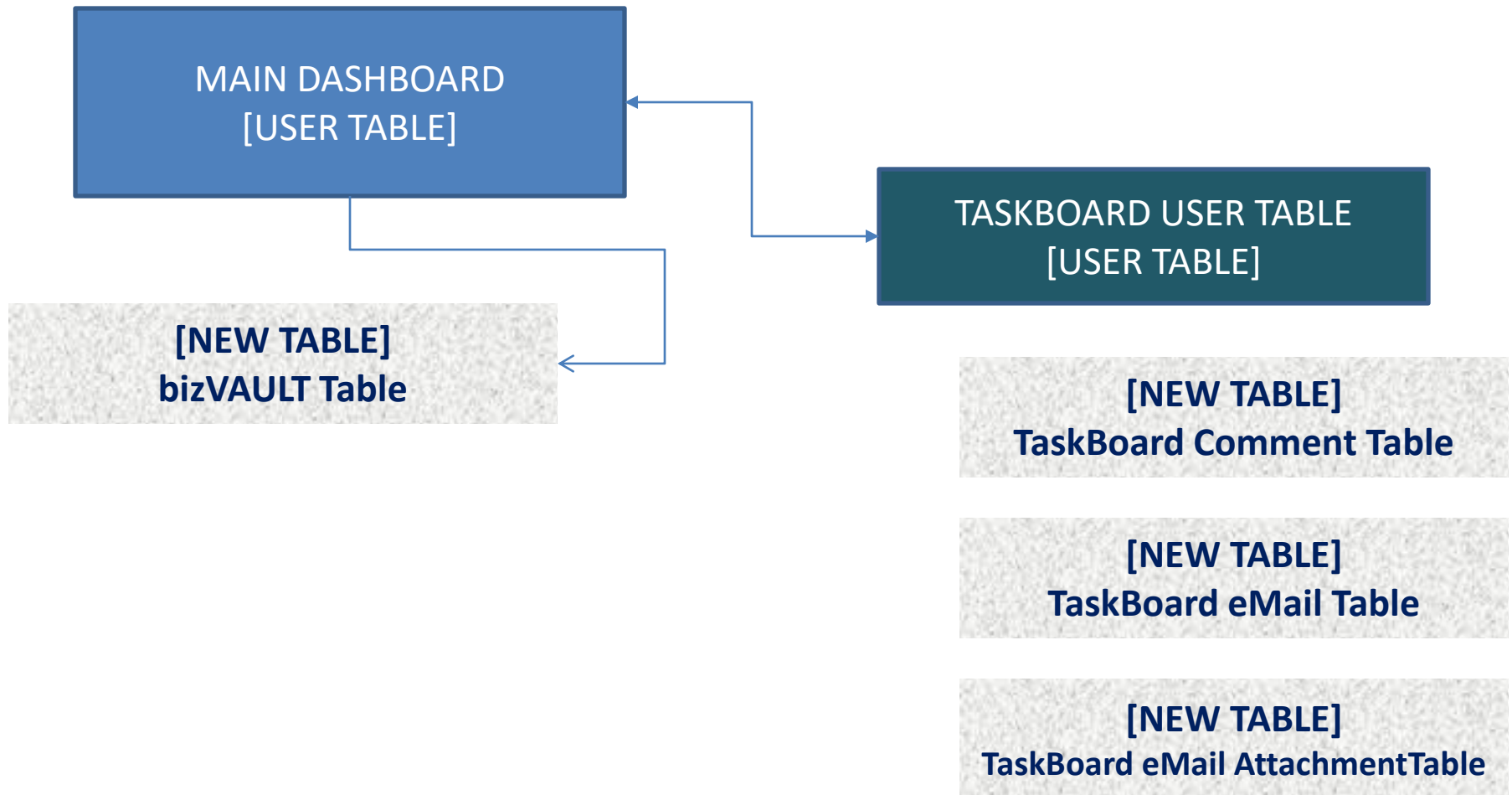
- Since the TaskBoard will serve as the “dealflow” pipeline – within the Partner’s Dashboard - each task should be considered a “deal”.
- Each deal will have a “*funding_approved_amount*” and a “*funding_request_amount*” associated with it.
- The “*funding_request_amount*” is inserted into the DB from the Main Dashboard when a Standard User submits a “Funding Request”
- The “*funding_approved_amount*” default value is the same as the “*funding_request_amount*” – but it can be changed by the Partner – if the Partner decides they are only willing to fund a different (typically lower) amount.

Basic Funding Partner TaskBoard [DealFlow Pipeline]

REQUEST SUBMITTED	REQUEST UNDER REVIEW	REVIEW COMPLETED	REQUEST APPROVED	FUNDING CLOSED	FUNDING DENIED
<div>Test10-Deal</div> <div>+</div> <div></div>	<div>Test5-Deal</div> <div>+</div> <div></div>	<div>Test4-Deal</div> <div>+</div> <div></div>	<div>Test8-Deal</div> <div>+</div> <div></div>	<div>Test1-Deal</div> <div>+</div> <div></div>	<div>Test3-Deal</div> <div>+</div> <div></div>
<div>Test9-Deal</div> <div>+</div> <div></div>	<div>Test6-Deal</div> <div>+</div> <div></div>	<div>Test2-Deal</div> <div>+</div> <div></div>	<div>Test7-Deal</div> <div>+</div> <div></div>		

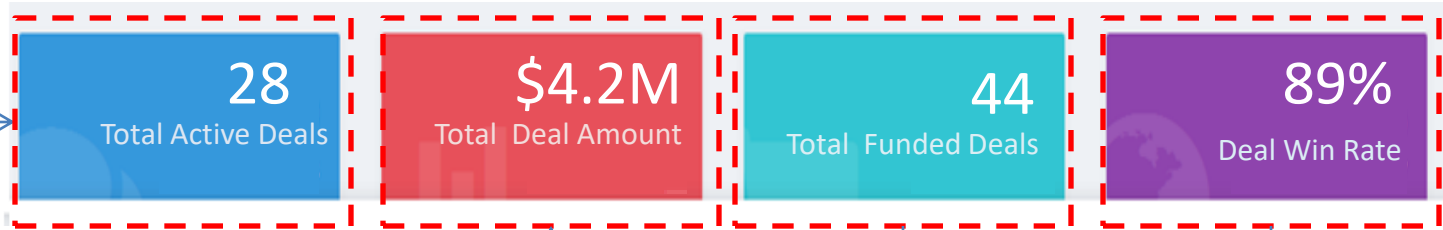
Updated “tasks” Table

Column	Type	Comment
task_id	int(11) <i>Auto Increment</i>	
task_title	varchar(255)	
task_description	text	
task_user	int(11)	
task_date_creation	timestamp [CURRENT_TIMESTAMP]	
task_due_date	datetime NULL	
task_date_closed	timestamp NULL	
task_container	int(11)	
task_order	int(11)	
task_funding_amount_requested	int(11)	[New Item For Atif] - Funding amount requested by User
task_funding_approved_amount	int(11)	[New Item For Atif] - Funding Amount Approved by Partner
task_user_bizVault_status	varchar(48)	[New Item For Atif] - bizVault Status for this Deal (Task)
task_user_bizVault_access_id	int(11)	[New Item For Atif] - bizVault Access ID for this Deal (Task)
task_time_spent	time NULL	
task_time_estimate	time NULL	
task_color	varchar(20) NULL [0]	
task_archived	tinyint(1) [0]	



CALCULATE KPI METRICS

SQL Psuedo Code: Get all tasks (deals) from task Table where "task_partner_id" = \$current_partner_id"



SQL Psuedo Code: Sum (task.funding_amount) where "task_partner_id" = \$current_partner_id"

SQL Psuedo Code: Sum all tasks where task_container = "FUNDING CLOSED" and "task_partner_id" = \$current_partner_id"

SQL Psuedo Code: Divide all FUNDING CLOSED tasks by all FUNDING DENIED tasks + FUNDIND DENIED tasks where "task_partner_id" = \$current_partner_id"

CODING NOTE: IF "FUNDING CLOSED" or "FUNDING DENIED" = 0 - then Deal Win Rate = "TBD"

Inserting a NEW Task into the TaskBoard “task” Table

AWT-CEP Your Small Business Success Dashboard

2018 Key Performance Indicators for DREAMBUILDER CONSTRUCTION CORP

Contract Details

Contract Number: 08-0R4404

Description: Install Vegetation Control Underneath Existing Metal Beam Guard Rail

Location: 800 882 St. SE, ALABAMA, AL

Contract Date: Jan 15, 2018

Contract Amount: \$797,061

GET FINANCING FOR THIS CONTRACT

Task Contract Board

NAME	CATEGORY	DESCRIPTION
DREAMBUILDER CONSTRUCTION CORP	CONTRACT	Install Vegetation Control Underneath Existing Metal Beam Guard Rail

View other contracts plus later requests here

California Small Business Success Copyright © 2018

Contract Financing Options

Company Name: DREAMBUILDER CONSTRUCTION CORP

Contract Name: Install Vegetation Control Underneath Existing Metal Beam Guard Rail

Contract Number: 08-0R4404

Contract Amount: \$797,061

Basic Partner

MORE INFO

CDC Line of Credit - You Qualify!

MicroLoan

DREAMBUILDER CONSTRUCTION CORP

YOU ARE **Pre-qualified**

UP TO \$13,000

[CLICK HERE TO LEARN MORE](#)

Close

Basic Partner

Loan Amount

Min — Max

\$10,000.00 — \$25,000.00

[APPLY NOW](#)

Loan Product: CDC Loan - FastFund

Interest Rate: 10% - 12%

Repayment Term: 6 - 48 Months

Repayment Frequency: Monthly

Origination Fees: 150% - 2,000%

Pre Payment Penalty? [NO](#)

Loan Details

The Math

	6 Month Loan		48 Month Loan	
	MONTHLY PAYMENT		MONTHLY PAYMENT	
MINIMUM LOAN AMOUNT	\$230.74	\$584.45	\$230.74	\$584.45
	Interest Rate 0.0%	Interest Rate 0.0%	Interest Rate 0.0%	Interest Rate 0.0%
\$10,000.00	Actual APR 12.9%	Actual APR 12.9%	Actual APR 12.9%	Actual APR 12.9%

	6 Month Loan		48 Month Loan	
	MONTHLY PAYMENT		MONTHLY PAYMENT	
MAXIMUM LOAN AMOUNT	\$230.74	\$584.45	\$230.74	\$584.45
	Interest Rate 0.0%	Interest Rate 0.0%	Interest Rate 0.0%	Interest Rate 0.0%
\$25,000.0	Actual APR 12.9%	Actual APR 12.9%	Actual APR 12.9%	Actual APR 12.9%

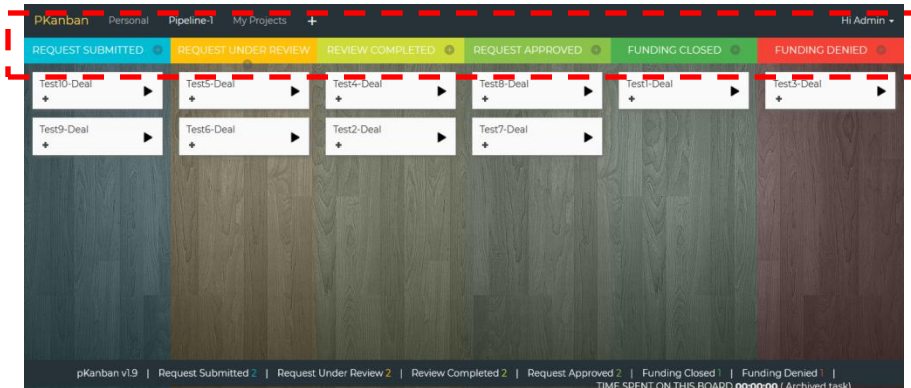
Close

When a **Standard User** clicks the “Apply” button - then a NEW task (deal) is created on the Partner TaskBoard.

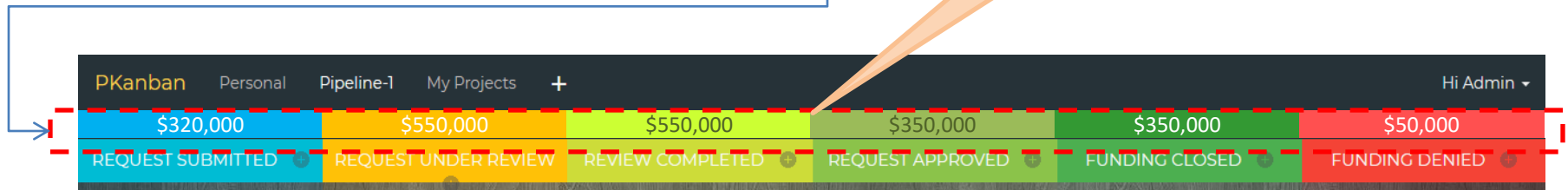
The User completes the Request Form including the “funding_request_amount” is inserted into the tasks Table

NEW Feature

ADD SUB-TOTAL TO TASKBOARD CONTAINER



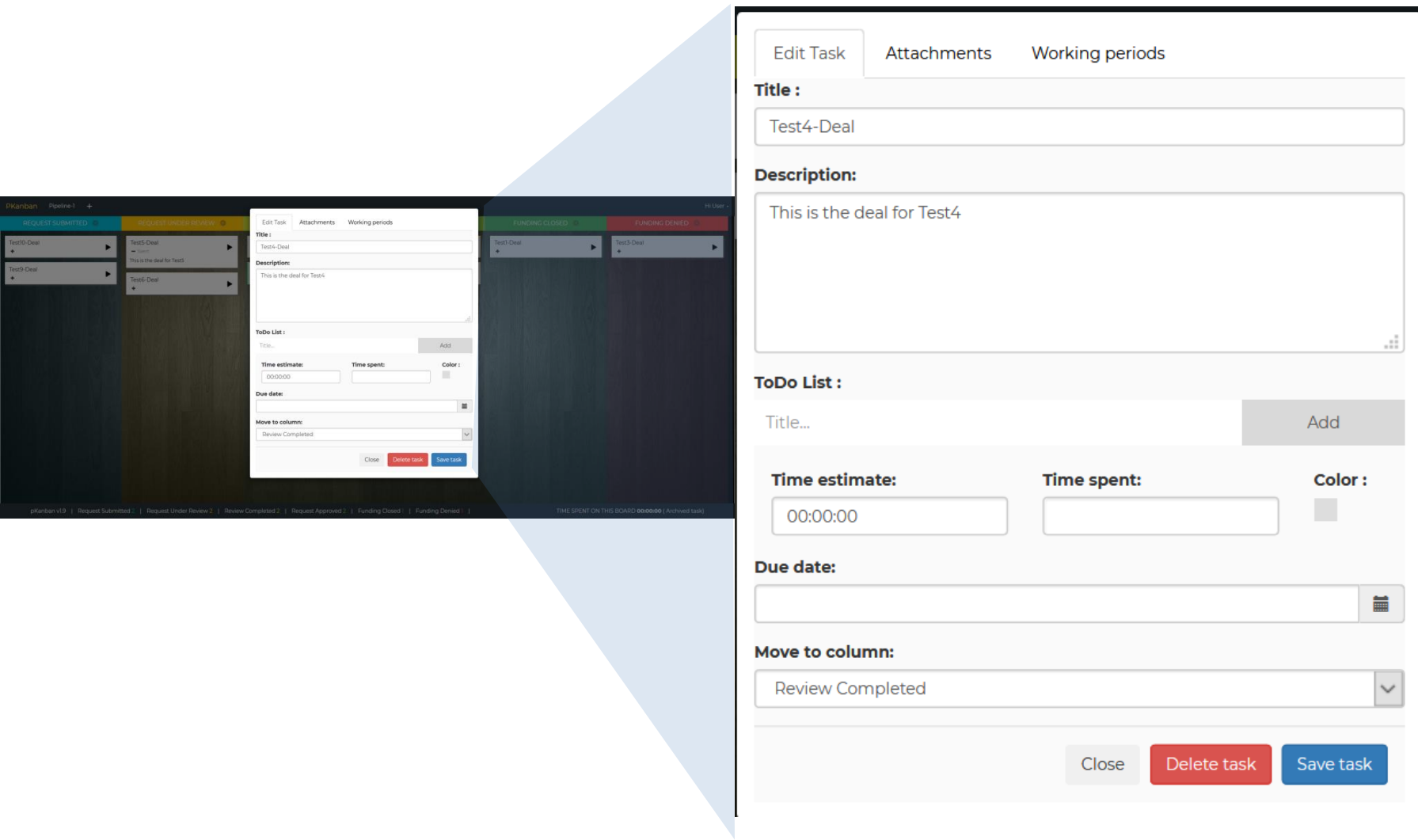
Add Sub-Total Row Above Each TaskBoard "Container"



NEW Feature

ADD COMMENTS TO TASKBOARD

Add Comment Section to Task (Deal) Window



Add Comment Section to Task (Deal) Window

Edit TaskAttachmentsWorking periods

Title :

Test4-Deal

Description:

This is the deal for Test4

ToDo List :

Title...Add

Time estimate:

00:00:00

Time spent:

Color :

Due date:

Move to column:

Review Completed

CloseDelete taskSave task

Edit TaskAttachmentsWorking periods

Title :

Test4-Deal

Description:

This is the deal for Test4

Add Comment

NF

Write a comment...

Save

Title...Add

Time estimate:

00:00:00

Time spent:

Color :

Due date:

Move to column:

Review Completed

CloseDelete taskSave task

Add Comment
Section



Add Comment

NF

Comment Title:

Write a comment...



Place User Picture
or Username
Initials Here

Allow for User to
attach files to
comment

Add Comment Section to Task (Deal) Window

Edit Task

Attachments

Working periods

Title :

Test4-Deal

Description:

This is the deal for Test4

Add Comment

NF

Comment Title:

Write a comment...

A

Apizano

Aug 10, 2018 at 10:56 AM

Loan approval obtained on 8/8, subject to an 80% State Guarantee. Sent approved credit memo to NorCal FDC for initial review/assessment. Attempting to obtain state guarantee approval on 8/15. Conditional loan commitment letter to be sent to borrower by COB 8/10.

🔗

Reply

Delete

Title...

Add

Time estimate:

00:00:00

Time spent:

Color :

Due date:

Move to column:

Review Completed

Close

Delete task

Save task

Display
Comments Like
This

A

Apizano

Aug 10, 2018 at 10:56 AM

Loan approval obtained on 8/8, subject to an 80% State Guarantee. Sent approved credit memo to NorCal FDC for initial review/assessment. Attempting to obtain state guarantee approval on 8/15. Conditional loan commitment letter to be sent to borrower by COB 8/10.

Reply

NEW Feature

SEND EMAIL TO A SPECIFIED TASK ("DEAL")

Edit Task

Attachments

Working periods

Title :

Test4-Deal

Edit Task

eMails

Attachments

Time Tracking

Title :

Test4-Deal

- Add eMail Tab
- Change Working Periods
to "Time Tracking"

Column	Type	Comment
task_email_id	int(11) <i>Auto Increment</i>	
task_email_user_id	int(11)	
task_email_task_id	int(11)	
task_email_inbox_name	varchar(128)	
task_email_received_date	timestamp [CURRENT_TIMESTAMP]	
task_email_sender_email_address	varchar(128)	
task_email_sender_first_name	varchar(64)	
task_email_sender_last_name	varchar(64)	
task_email_subject	varchar(256)	
task_email_message	mediumtext	

task_email_user_id : ID of User receiving this email
task_email_task_id: Task ID of this email
task_email_inbox_name: Inbox Name Associated with this email

CODING NOTE TO ATIF:

The email function is similar to trello email feature that allows you to send email directly to a trello card. This feature will do the same by allowing external users to send or cc email to a specific task (deal) on the TaskBoard.

Each task has a unique “email_inbox_name” that is used to associated external Emails to a specific task on the TaskBoard. Emails can be sent by adding the “task_email_inbox_name” to the “To”, “CC” or “BCC line when sending email from An external email server or service (gmail, yahoo, outlook, etc).

Additional code must be written to search the “to”, “cc” and “bcc” strings for the Unique “task_email_inbox_name” string – if the string is found the email should be stored in the appropriate database fields.

Edit Task

eMails

Attachments

Time Tracking



☐ Select All

☐ [Redacted] 11:20
[Redacted] daily news updat...
Tuesday 27th November 2018 View in... ☆

☐ [Redacted] 09:27
Latest news: Man in critical condition...
Tuesday 27th November 2018 View in... ☆

☐ [Redacted] 26 Nov
Where will we be in 10 years?
Dear , This day, 10 years ago, the Clim... ☆

☐ [Redacted] 26 Nov
Where will we be in 10 years?
Dear , This day, 10 years ago, the Clim... ☆

☐ Aisha Hannibal, Liv. 10 Oct
Urge your council: make streets safer ...
October is International Walk to Scho... ☆

☐ Aisha Hannibal, Liv. 1 Oct
Want safer streets?
October is International Walk to Scho... ☆

☐ Living Streets 13 Sep
Good news for walking: Bank Junctio...
A success for pedestrians Dear Wand... ☆

eMail Received *Date: May 13, 2019 @3:45pm*

eMail Subject *Test eMail Subject*

eMail Subject *Test eMail Subject*

From *John Doe*

A critical component to the growth and success of any small business winning new business opportunities. The California Access to Capital Program has launched a number of key initiatives for California Certified Businesses to ensure when these business win or are awarded State or Local government contracts they can obtain the funding they need to successfully deliver the products, goods and services associated with the awarded contract.

California small businesses need capital to grow and thrive. Our programs are designed to meet the unique needs of California business owners. By utilizing an expansive network of lending partners, funding sources and direct lending programs the California Access to Capital Program has enabled over \$750M of small business capital over the past 3 years.

Our team of professional business bankers, financial planners and consultants have over 320 years of combined experience in banking and business financing. Our banking and financing consultants and specialists come from industry leading organizations such as the SBA (Small Business Administration), Wells Fargo Bank, Bank of America, Union Bank, Accenture and Deloitte just to name a few.

Our free services are offered as part of the California Access to Capital Program and provided as part of California's wide range of small business support services.



Sample_Attachment_Doc.pdf

Edit Task

eMails

Attachments

Time Tracking

Select All

11:20

daily news updat...

Tuesday 27th November 2018 View in...

09:27

Latest news: Man in critical condition...

Tuesday 27th November 2018 View in...

26 Nov

Where will we be in 10 years?

Dear , This day, 10 years ago, the Clim...

26 Nov

Where will we be in 10 years?

Dear , This day, 10 years ago, the Clim...

10 Oct

Aisha Hannibal, Liv.

Urge your council: make streets safer ...

October is International Walk to Scho...

1 Oct

Aisha Hannibal, Liv.

Want safer streets?

October is International Walk to Scho...

13 Sep

Living Streets

Good news for walking: Bank Junctio...

A success for pedestrians Dear Wand...

eMail Received

Date: May 13, 2019 @3:45pm

eMail Subject

Test eMail Subject

eMail Subject

Test eMail Subject

From

John Doe

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Sample_Attachment_Doc.pdf

TaskBoard eMail Top Banner Section

TaskBoard eMail Listing Section

Main Message Section

eMail Attachments Section