Business Rules (Up to end of E2) Real Estate System 2019-09-15

**Business Rules – you must format these and choose the appropriate type and category for the business rules, the date for these can be the project start date. The originator can be the project sponsor (me).**

**001 – Customer Age Requirement Date: 10/02/2019**

**Category: Constraint Type: Dynamic**

A customer must be legal age of majority according to the laws of the province the agency is operating in. Picture driver’s license is the required proof of identity and legal age.

**002 – Required Listing Agent** **Date: 10/02/2019**

**Category: Structural Fact Type: Static**

Each property listing added to the system must be associated with an agent, but this can only be done once the listing paperwork has been completed and signed off with a customer signature. The system will require an acknowledgement of completed contract when assigning an agent to a listing.

**003 – Listing Contract Details** **Date: 10/02/2019**

**Category: Structural Fact Type: Static**

Only one agent can represent a customer’s listing at any one time. A listing contract has a start date and end date which encompass a 3 month period. Listings can be renewed. An agent normally cannot be changed for the duration of the listing contract. When the 3 month contract expires, a new agent can be selected.

**004 – Property Listing Sold Status Modification** **Date: 10/02/2019**

**Category: Constraint Type: Static**

Property Listing Status – for the purposes of this website, if an agent marks a property as ‘potentially sold’ this does not remove the property listing from the website until the appropriate paperwork, financing and authorizations are completed with all banking and legal parties. Marking a property listing as ‘potentially sold’ simply flags the property listing so potential buyers can visibly see the property listing is unavailable for further showings (it will display on the site as SOLD). Only the listing agent or the Agency Broker can mark a property as ‘potentially sold’ or change a property listing’s status back to available. When all financial and legal matters are attended to and the property is legally sold to another, the property is not deleted but rather marked as ‘sold’ by the listing agent or the broker, and the record is archived and will no longer display on the website although all data is maintained for agency records.

**005 – Property Listing Expiration Process** **Date: 10/02/2019**

**Category: Constraint Type: Static**

Should a listing contract expire with the property still in an ‘unsold’ state, the property listing is not deleted but is removed from available listings which means it will no longer show up in search results or be permitted to be shown by agents. Customers who own a property that is listed with the Agency should be sent an automatic listing contract renewal email prior to the listing expiry to alert them that the contract is near its end so they may avoid interruption of service. The email will appear to come from their listing agent, although it will be sent from the system. The email should have a link embedded that will allow the customer to renew the contract for another three months. The customer will be required to log in to the website in order to facilitate this renewal.

**006 – Minimum Number of Pictures** **Date: 10/02/2019**

**Category: Constraint Type: Static**

All listings must have at least one picture, but they may have up to 7 pictures if desired

**007 – Listing Without Signed Contract** **Date: 10/02/2019**

**Category: Constraint Type: Static**

A customer already in the system wishes to list property with an agent. A signed contract with that agent must be evident prior to the listing being associated with the agent and becoming available for display on the website. Should the customer wish to provide all pertinent listing details to an Agency Staff Member this is permitted and can be recorded, however the listing cannot be associated with the agent, nor will it appear on the Real Estate website until confirmation of a signed contract can be indicated in the system.

**008 – Cancel Saved Listing** **Date: 10/02/2019**

**Category: Constraint Type: Static**

A saved listing can only be cancelled by most Agency Staff Members if it hasn’t been associated with an agent. The only person who has authority to cancel a listing already assigned to an agent is the Agency Broker.

**009 – Personnel Privacy Policy** **Date: 10/02/2019**

**Category: Constraint Type: Static**

Personal information of Agency Personnel is not publicized or shared with outside parties. It is kept only for the use of the Agency alone. Social Insurance Number, LoggedInUserName, Street Address, Postal code, Home Phone Number, and date of birth are examples of personal information.

**010 – Employment Age Requirement** **Date: 10/02/2019**

**Category: Constraint Type: Dynamic**

Employees must be of legal age. Legal age status must be proven at the time of hiring via government issued picture id. The minimum age should be the age of majority in the province of operation.

**011 – Authorized Account Creation** **Date: 10/02/2019**

**Category: Constraint Type: Static**

The Employees with the position of Office Manager or Broker should be granted the authority to create other staff accounts. They also have the ability to modify existing staff accounts.

**012 – Image Security Policy** **Date: 10/02/2019**

**Category: Constraint Type: Static**

All uploaded images must be physically viewed by a human before they are accepted for viewing by the public on the site. By default, a listing or an Agent will have a “Picture Not Available” image that displays temporarily until the images have been approved. Once an image has been viewed and deemed acceptable, it will be placed into the images folder.

**013 – Image Upload and Metadata** **Date: 10/02/2019**

**Category: Structural Fact Type: Static**

When an image is to be uploaded, the path that is stored in the database will be the path to where the image will be placed once it has been physically approved. The file name for an agent’s image should be the Agent’s first name, middle name and last name. The file name for images associated with a listing should be the listing identifier and street address. In all cases, if there are files of the same name uploaded, a number should be appended to ensure unique file names.

**014 – Showing Appointment Authority** **Date: 10/02/2019**

**Category: Constraint Type: Static**

The Office manager OR the Agent involved may create a showing appointment with a particular Customer and Agent at a given time to view property.

**015 – Showing Appointment Travel Time** **Date: 10/02/2019**

**Category: Constraint Type: Static**

When a showing appointment is booked, an agent requires a block of 15 minutes before the appointment and 15 minutes after the appointment for travel time.

**016 – Current Agent Booking Showing** **Date: 10/02/2019**

**Category: Constraint Type: Static**

If the “logged in” Agent is the person booking a showing, he/she will be the selected agent for a booking and no other Agent can be booked. In the case where the Office Manager is booking a showing, the Office Manager will be required to choose the appropriate agent.

**017 – Upload Authorization** **Date: 10/02/2019**

**Category: Constraint Type: Static**

All staff are permitted to do image uploads.