**Requirements**

* Code committed to a source code repository we own so we can do code reviews and track the progress to make sure we’re on the right path. We can provide up to 3 GitHub licenses.

**Overview**: DocAssist is a B2B company servicing mortgage professionals (users). We need a portal where users can register an account, login and place orders and submit information for review.

**General Features**

* **Registration:** The user will be able to easily register for an account, login, and reset their password.
* **Tracking**: The portal will have user analytics (maybe Google Analytics) installed so we can track user behaviour.
* **Domain**: This portal will be hosted at app.docassist.ca. Depending on difficulty, we may want multiple subdomains with the same functionality so we can white label our service for brokerages (companies). See the section below on ‘white label capability’ for more details.
* **Payments**:
  + Users will pay us for most orders. However there are some legacy accounts that receive special pricing, and some orders do not have a charge per submission. For the users that require special pricing we will create a second price tier.
  + The user will be able to store their credit card on file using Stripe so that it is billed when the user places a one-time order. The user will also be able to manually enter a different payment card.
* **Salesforce integration**: The portal will integrate with Salesforce so we can track orders and registrations. Zapier is an acceptable solution if a direct integration is not possible.
* **Past Data Migration**: We currently have accounts registered in WooCommerce. We need to transfer the member base to the new system and provide legacy users with the same benefits they were promised. The benefits are briefly discussed in the payments section (above).
* **Submission Tracking**: Every submission a user does will be visible on the platform so the user can track the status of past orders.

**Document Ordering Service**:

* **Overview**: These are transactional services available from the portal. While logged in, the user will complete and submit a form. When we receive an order our administrative team must complete the order from Salesforce.
* **Form 1: NOA’s (Notice of Assessments)**
  + **Step 1**: The mortgage user selects the NOA option and is presented with two choices:  
    - **Choice 1**: Upload the signed document. This is if the client already signed the paperwork and the user wants us to process the transaction. They provide us with the client details in a form and upload the documents.
    - **Choice 2**: Email the client. If the user wants us to email the form to the client for completion, they will give us the client’s name and email. We will send an email to the client with a PDF attached along with instructions. The email will be sent from noreply@docassist.ca because we do not want to interact with the client directly.
  + **Step 2**: After the user chooses their choice but before it is executed, the user will be told their card on file will be charged. They may choose to manually enter a different card.
  + **Step 3**: The user is sent to a thank you page and the order is processed. The order information is passed into Salesforce.
* **Form 2: Title Searches**
  + **Step 1**: The user fills out a few mandatory fields
  + **Step 2**: The user will be told their card on file will be charged. They may choose to manually enter a different card.
  + **Step 3**: The user is sent to a thank you page and the order is processed. The order information is passed into Salesforce.
* **Form 3**: **& Corporate Registry Searches**
  + **Exact same functionality as Form 2, just different questions**
* **Form 3: Compliance Package**

* **Overview**: The user completes a form which is sent to Salesforce. There is no payment in this transaction. The form does have conditional logic.
* **Visibility:** This service is only available to a few select companies. The user must only have access if they are ‘associated’ with a specific company. See the White Label capability in the next section for the expanded functionality.
* **Registering**: Once a user registers, if they are part of the company we will manually associate them to the company. Then they will have access to the compliance package.
* **Document Upload**: The user has the ability to upload documents using drag and drop section. Documents are sent to dropbox.

**White label capability**

* We have companies that want the portal branded to their corporate name. We want the option to create a subdomain that is powered by the same database but has custom branding.
* **For example:**
  + **Domain**: https://abc.docassist.ca
  + **Logo**:‘ABC Mortgage’
  + **Availability:** Only users associated with the ABC Mortgage company can login to the subdomain. If they are not registered they can request access.