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***Meriweather Management System***

***v.1.1***

***Scope of Work Document***

## 

## Revisions

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| --- | --- | --- | --- |
| Version | Date | Author | Comments |
| 1.0 | 1/18/10 | Andy Tan | First Draft |
| 1.1 | 2/10/10 | Andy Tan | Updates |
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# I. Project Description

The main objective of this document is to specify the project scope and deliverables necessary to support the daily process for Meriweather Mowing Services. This document explains the expected high level functionality for the initial release of the software.

# II. Drivers

* Provide a central database for customer, property, services, crews
* Ability to schedule and automate daily operations
* A database schema to hold collection of data in which reports and specific metrics can be obtained and derived from.
* Automate Meriweather repeatable processes to include scheduling services, printing daily reports, provide customer letter reminders and customer list for newsletter.

# III. Project Scope

Meriweather Management System v.10 to include the following features:

1. Employees
   1. List of Employees
   2. Ability to add, edit and archive Employees
   3. Search based on key words
   4. Filter on Active, non-active employees, contractors
2. Vendors
   1. List of Vendors
   2. Ability to add, edit and archive Vendors
   3. Search based on key words
   4. Filter on Active, non-active vendors
3. Customers
   1. List of Customers
   2. Ability to add, edit and archive customers
   3. Filter, search based on key words
   4. Assignable Groups (*Current, In-Frequent, Archived*)
   5. Customer with multiple properties
4. Properties
   1. List of Properties based on Customer
   2. Ability to add, edit and archive property
   3. Filter (Active, Archived)
5. Services (serves as a master service list for customer properties)
   1. List of Services based on customer properties
   2. Ability to create Jobs *(Mow, Leaf, Gutter, or Other)*
   3. Search based on key words
   4. Filter on customer Groups (*Current, In-Frequent, Archived*)
   5. Property Route Assignment
   6. Flag and assign customer as a 4 Step customer
   7. Add, edit and save information for cost, seasonal codes, four step, proposed prices, and instructions *(leaf, gutter, 4step, special)*
6. Scheduled Work
   1. List of schedule work based on services
   2. Ability to add, delete and modify jobs
   3. Search based on key words
   4. Filter based on status - pending, deferred, completed, abandoned.
   5. Filter based on date - today’s job, or custom dates
   6. Assignment of schedule work status *(Pending, Deferred, Completed, Abandoned)*
   7. Assignment of Crew based on Employees/Contractors
   8. Field for saving Cost, Man Hours, Contract Cost, 4Step Cost for reporting
7. Routing
   1. User Defined Routes
   2. Filter on different route types
   3. Route assignment of property
   4. Ability to order property
   5. Delete routes - assignable
   6. Map Functionality for quick preview of property locations
8. Letter Reminder
   1. Generic Letter Editor (Word Processor capable)
      1. MS Word compatibility
      2. Ability to save template
   2. Handle data fields merge (data as defined by MMS)
   3. Ability to parse current job codes for batch printing of letter reminders
9. Reports
   1. MMS Listing/Instruction Sheet
   2. MMS Revenue Sheet
   3. Contractor Listing/Instruction Sheet
   4. Contractor Pay Sheet
   5. Contractor Revenue Sheet
   6. Other Job List (Mow, gutter, Leaf, Four Step)
   7. Service Job History (pending, completed)
   8. Invoice Report based on date of completed jobs
   9. Extensible database - schema for future data analysis and reporting
10. Password Login
    1. Ability for secure login
    2. Ability to lock application
11. Print
    1. Customer List, Property List
    2. Employee List
    3. Vendor List
    4. Print Preview
12. Newsletter functionality
    1. Exports a CVS file of customer information (as defined by MMS)
    2. Ability to specify exception dates, to exclude customers based on date of services.
13. Configuration
    1. General Preferences (Password, Sound, Template path)
    2. User defined field for Customer Types, Routes, Job Status
14. Miscellaneous
    1. Export Customer, Vendor, Employee, Services, Schedule, Route to Excel
    2. Grid list with column header sort
    3. Hide and unhide columns
    4. Ability for Online software updates and patches
    5. Users Manual
15. Import Tool
    1. Imports current mowlist database
16. Support & Maintenance
    1. Major/Minor software defects addressed
    2. Minor enhancements

# IV. Out of Scope

The following are considered out of scope for the initial delivery of the Meriweather Management System version 1.0. These items can be scoped out and defined accordingly.

1. Job Analysis
   1. Report types
   2. Additional Data or DB schema
2. QuickBooks Invoicing
   1. Integration to SDK.
   2. Invoicing tied to account number?

# V. Deliverables

1. MMS Program
2. Documented Users manual
3. Training
4. Software updates for problems resolutions
5. Minor enhancements

# VI. Milestones

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| --- | --- | --- | --- |
| **Milestone** | Description | Date | Payment  $8700 |
| M0 | Start of Project | 1/23/09 | 10% (paid)  870 |
| M1 | Prototype  -Requirements Gathering  -Database Design  - Framework | 3/27/09 | 25% (paid)  2175 |
| M2 | Basic Functionality  - Employee, Properties  - Customer, Vendors  -Services, Schedule Jobs  -Import mowlist database  -Routing | 1/20/10 | 20%  1740 |
| M3 | Delivered functional software  - Usable system delivered  - Database freeze  - Letter Editor, job codes  -Newsletter export  - Printout of Jobs/contractor, etc | 2/15/10 | 20%  1260  -480 |
| M4 | Completed  -Basic Reporting  -Invoice print out  -Major problems solved  -Minor enhancements | 2/30/10 | 15% |
| M5 | Released - Acceptance  -Minor fixes continues  -Minor enhancements continues | 5/30/10 | 10% |

# VII. Stakeholders

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| **Name** | Role | Email Address |
| Rod Ballard | Primary Stakeholder | mmsthebest@aol.com |
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