A Web Page

http://

[Dashboard](#) | [Fuel Suppliers](#) | [Account Activity](#) | [Notifications](#) | [Admin](#)

Dashboard

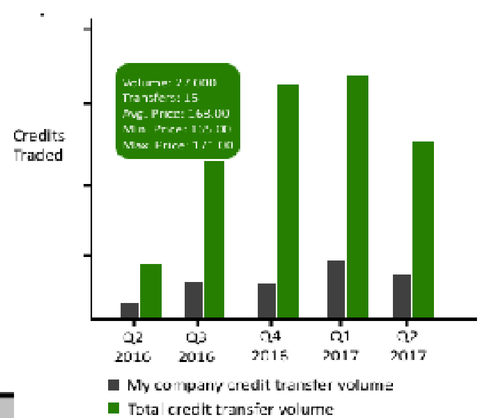
Recent Activity

Proposal	User	Status	Updated ▼	Edit
[Air Liquide offers to buy 6000 credits at 165.00 each from Green-Tech. Total: 99000.00](#)	Jane Fields	Proposed	06-27-2017	
[Air Liquide offers to buy 12000 credits at 155.00 each from HydroCorp. Total: 186000.00](#)	Jaime Vasqu	Draft	06-24-2017	✎
[Air Liquide offers to buy 4000 credits at 160.00 each from Kleen Fuelz. Total: 64000.00](#)	Claire Lecle	Accepted	06-21-2017	

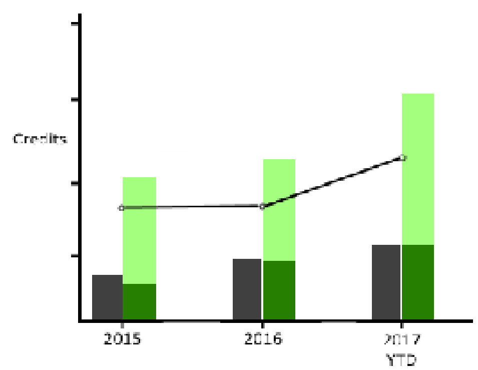
Average Credit Price

Period ▼	Provincial Average	Company Average
2017 Q3	168.00	N/A
2017 YTD	176.00	172.00
2016	167.00	169.00

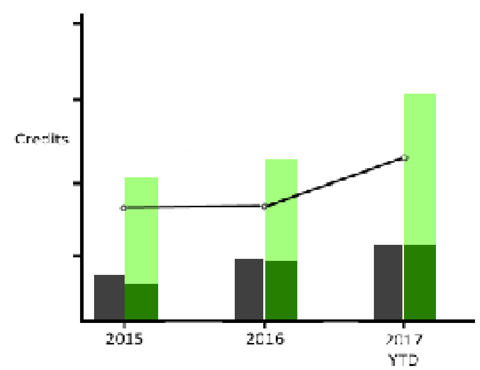
Credit Transfer Volume Per Quarter



Net Debits/Credits Per Year - Industry



Net Debits/Credits Per Year - Company



Dashboard
Company-specific information is only shown for external users. internal users only see the industry data.

Recent Activity

- Only show last 3 changes from the Account Activity area.
- Users can access Edit/View controls based on their Role and the status of the Activity (Submitted, Accepted etc.)

Link opens a read-only view
Pencil opens an edit view

Average Price/Credit

- Shows information from the Low Carbon Fuel Credit Market Report
  - Avg price for current Year To Date
  - Avg price for last complete quarter (could be previous year)
  - Avg price for last complete year
  - Show company average for the same periods

Charts
First 2 charts do not include 0 and near-0 dollar transfers
We do not include any unapproved transactions in our calculations

Transfer Volume Per Quarter

- Rolling 8 quarters (only closed quarters)
- Bar showing total volume of credits traded
- Bar showing user's company volume of credits traded
- On-click(?), open dialog show the following for the appropriate quarter:
  - No. of Transfers:
  - Avg. Price:
  - Min. Price:
  - Max. Price:

Net Debits/Credits - Industry

- Rolling 5 years, including last complete quarter of current year (e.g., 2017 to Q3)
- Stacked credits bar (Fuel and Awarded)
- Debits bar
- Net Credits line

Chart needs to be able to handle negative Net Credits

Net Debits/Credits - Company
Same as Industry chart but uses just the company data

Market Report Disclaimer: All charts are subject to adjustment, based on compliance and verification numbers - **do we need to include this?**

A Web Page

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Dashboard | Fuel Suppliers | Account Activity | Notifications | Admin

List | Company Details

Fuel Suppliers

search

Company Name	Contact Name	Contact Email	Contact Phone
Company name	John Smith	j.smith@company.ca	555-453-6161
Company name	Jinder Phagura	jinder.phagura@company.com	555-813-8181
Company name	Frida Chin	f.chin@company.net	555-313-4151
Company name	Dan Brown	danbrown@company.io	555-898-3132
Company name	Lesley Sturm	lsturm@company.nz	555-966-4155
Company name	Damon Albarn	dalbarn@company.il	555-833-3333
Company name	Kim Deal	kim.deel@company.org	555-677-1138
Company name	Massimo Zolbrod	m.zolbrod@company.net	555-311-4952
Company name	Jem Finer	jemfiner@company.ru	555-981-1367
Company name	Jackie Griggs	jgriggs@company.ie	555-211-9898
Company name	Emma Soo	emma.soo@company.no	555-818-3646
Company name	Caitlin Moore	caitlinmoore@company.sp	555-621-6216

Fuel Suppliers List - External view
This is what non-Gov users see when they look at the Fuel Suppliers list

Secondary Navigation allows them to switch to Company Details

Shows information available in the Validation and Transfer of Credits PDF on LCFB site

Lock the table headings so that they are always visible

- Sorted Alphabetically
- No access to other Fuel Supplier details

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Dashboard | Fuel Suppliers | Account Activity | Notifications | Admin

List | Company Details

Air Liquide Ltd.

Corp. Address: 612 Wharf Avenue, Calgary AB, T1X 0L6

Credit Balance: 6,250

Status: Sell Only

Contacts

Add

search

Name	Role	Email	Phone	Status	Edit
Giacomo Guilizzoni	Admin	g.guillizoni@company.ca	250-763-4143	Active	
Marco Botton	Analyst	m.button@company.ca	250-763-4144	Active	
Mariah Maclachlan	Analyst	m.maclachlan@company.ca	250-763-4156	Active	

☑ Only show Active Contacts

Correspondence

Add

search

Document Name	Compliance Year	Upload Date	Contact	Organization	Notes
2017 Compliance Report	2017	03-28-2018	Marco Button	Air Liquide	

Contact Activity History

search

Company Information Area

- Status can only be changed by Internal users with Analyst Role
- Drop-down list includes
  - Sell Only
  - Buy & Sell
  - Not allowed to Buy or Sell
- All other users see Status as a static string

Lock the table headings so that they are always visible

Contacts (4 rows)

- Add, Edit View controls are visible to Externals with the right role/ permissions
- Link open read-only view of Contact
- Pencil opens editable view of Contact
- Default Sort aphabetically by first name
- Non-Admin contacts can click the Pencil in their row to edit their own information

Correspondence (4 rows)

- Add, View, View Notes controls are visible to Externals with the appropriate role/permissions
- Link opens the file/offers to download
- View - opens the Notes in a modal window
- Default Sort: reverse chronologically by Upload Date

Contact Activity Log - used to be History (table not shown) (4 rows)
Table lists activity by Contacts within the organization

- Created a credit transfer proposal
- Updated a credit transfer proposal
- Accepted a credit transfer proposal
- Declined a credit transfer proposal
- Sent a credit transfer proposal
- Rescinded a credit transfer proposal
- Added <contact name>
- Updated <contact name>
- **Made <contact name> Inactive**
- Uploaded <document name>
- Downloaded <document name>

Default Sort is reverse chronological
Columns:

- Description
- Contact
- Date

Notifications

- Govt approves a credit transfer
- Govt rejects a credit transfer
- Govt awards credits
- Govt reduces credits
- Govt validates credits
- Company proposes a transfer
- Company rescinds a transfer
- Company receives a proposal
- Company accepts a proposal
- Compmany declines a proposal
- Someone accepts our proposal
- Someone declines our propasl

A Web Page

Account Activity | Notifications | Admin

<Add/Edit> Contact

First Name:* [ ] ☐ Show contact in Fuel Suppliers list

Last Name:* [ ]

Contacts must use a BCeID to login

BCeID:* [ ]

Add contact to Business BCeID

Work Ph.: Enter 10-digit number

The contact will receive text notifications

Mobile Ph.: Enter 10-digit number

The contact will receive email notifications

Email: [ ] ☐ Do not send email notifications

Inactive contacts cannot login to the system, but their activity is saved

Status*: Active

Roles:* Select roles

- Create, Edit, and View credit transfers
- Upload files to BC Government
- Propose or Rescind credit transfers to other companies
- Accept or Decline credit transfers from other companies
- Add, Edit, and Delete contacts

* Required

Cancel | Save

Add/Edit Contact (External)
Opens when Add button or Pencil icon is clicked

Contact Info
Mobile and Email

- Include a tip that explains how the information will be used
- Entering a phone number automatically sets up SMS notifications
- Entering an email automatically sets up

BCeID

- Include a tip that explains function: "Contacts must use a BCeID to login"
- Link to BCeID site below field - https://www.bceid.ca/

Status

- 2 options
  - Active
  - Inactive

Roles

- Include a tip explaining that they have to select at least one Role for a contact
- User can choose up to 3 options:
  - Admin
  - Director
  - Analyst

Notifications

- Admin can select how user should be notified. Users can update this themselves later.
- Users always get System notifications.

Confirmation

<current Fuel Supplier list contact> is currently the contact for this organization. You can only have one contact on this list at a time.

Do you want to change the contact to <contact being saved>?

No | Yes

1

Confirmation

<current Fuel Supplier list contact> is currently the contact for this organization in the Fuel Suppliers list. Your organization will not have a contact in this list until you select another.

Do you want to change this contact's status to Inactive?

No | Yes

2

Validations
Checkbox
Need a validation dialog if there is already a contact with this setting. Only 1 person can be in the Fuel Suppliers list. Validate on Save. (1)

- **Yes** - change the contact info in the Fuel Supplier list
- **No** - clear the setting/checkbox for this contact and save the record.

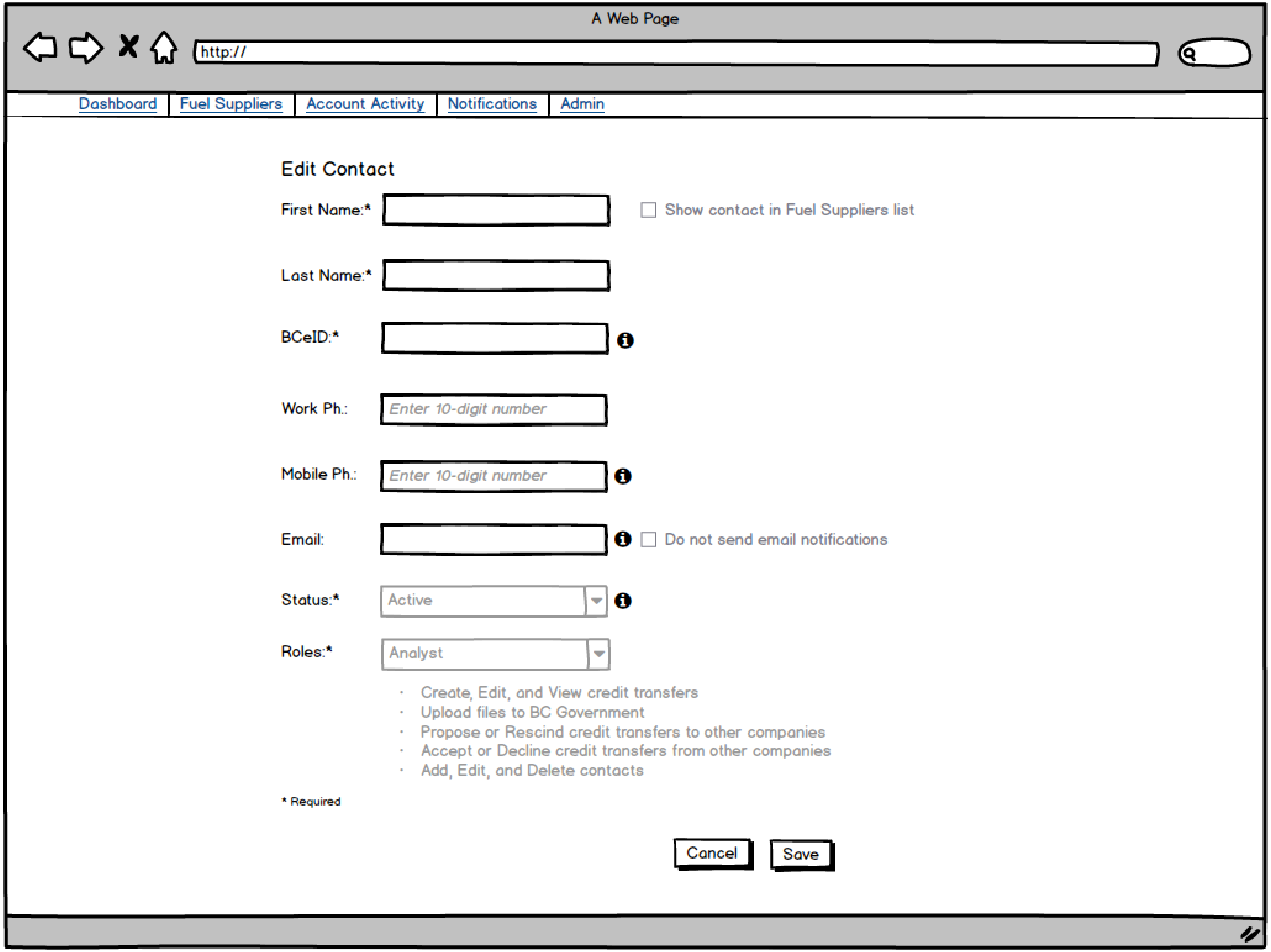
Making the Fuel Suppliers list contact Inactive (2)

In-line Validations
First Name
Enter contact's first name

Last Name
Enter contact's last name

BCeID
Enter contact's BCeID number

Roles
Select at least one role for this contact



Edit Contact - Non-Admin (External)
Non-Admin Contacts can edit their own information

They cannot view or edit another Contact's information

Other than Status, Roles and the Fuel Suppliers checkbox, we are not restricting what they can edit.

Disabled controls
Status
Role
Fuel Suppliers check box
Do not send email notifications checkbox (if it is showing)

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Dashboard | Fuel Suppliers | Account Activity | Notifications | **Admin**

Contact

First Name: John - Contact appears in Fuel Suppliers list

Last Name: Doe

BCeID: 1987654325

Work Ph.: 555-555-5555

Mobile Ph.: 555-555-5554

Email: john.doe@company.com - Does not receive email notifications

Status: Active

Roles: Admin, Analyst, Director

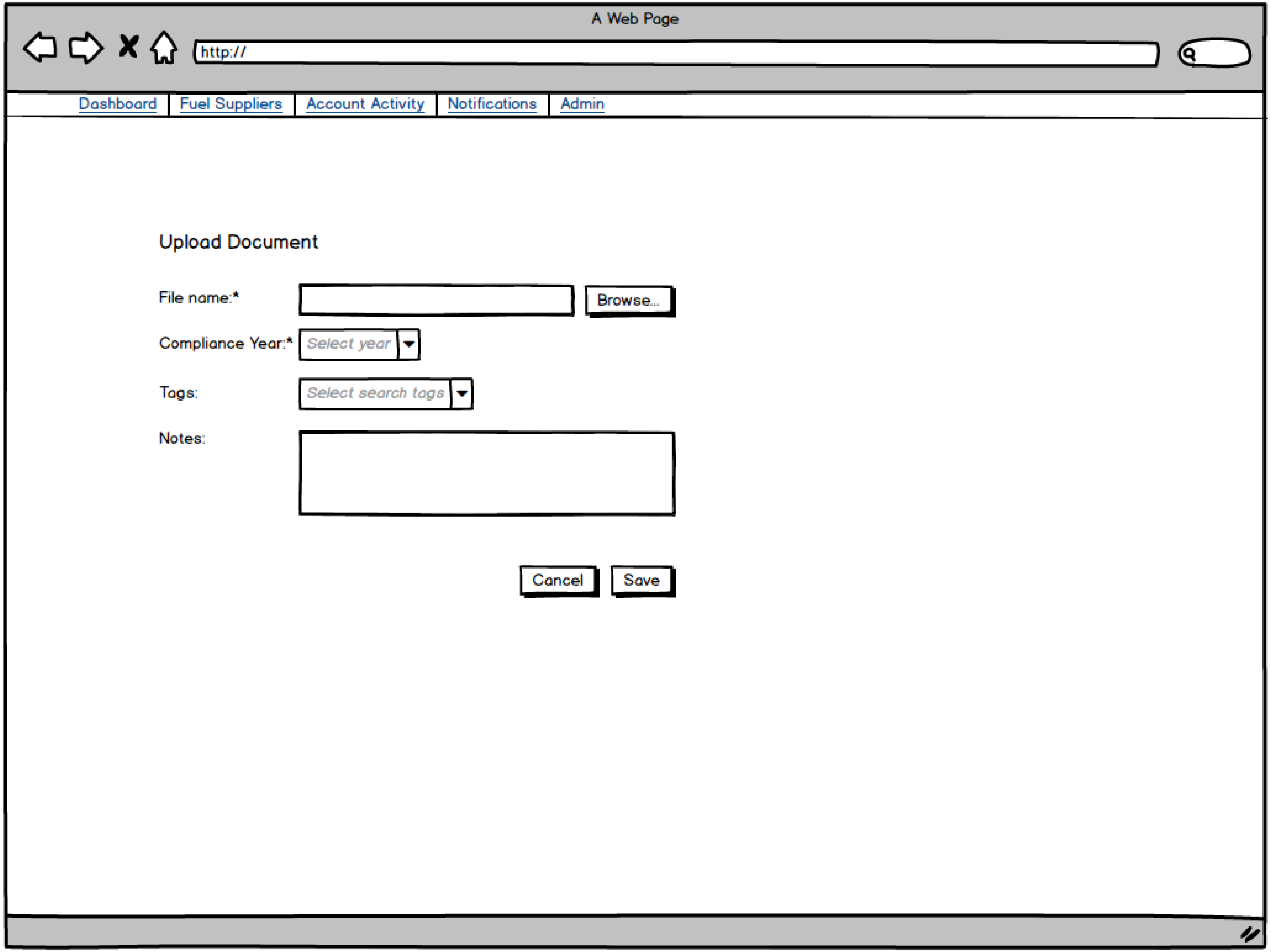
- Create, Edit, and View credit transfers
- Upload files to BC Government
- Propose or Rescind credit transfers to other companies
- Accept or Decline credit transfers from other companies
- Add, Edit, and Delete contacts

Close

View Contact
This is the same window that is available to Industry Admins

If user has edit permissions, they can click the pencil icon - this then becomes the Add/Edit window

Close - returns the user to the Contacts table



Upload - access from Fuel Supplier details

Compliance Year

- **List includes options from 2015 to present**
- **Can list automatically add another year when calendar turns over? -** System should be one year behind actual year (e.g., on Jan 2108, 2017 should be available as a compliance year)

Tags

- Multi-select drop-list
- When more than one tag is selected and list is closed, show "Multiple Selections"
- **We need a list of tags from LCFB - or Stephen?**

Buttons
Cancel - return to Fuel Supplier details page, do not save
Save - save file to DB, return to Fuel Supplier details

In-line Validations

File name
Select a file to upload

Compliance Year
Select which Compliance Year the file relates to

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Dashboard | **Fuel Suppliers** | Account Activity | Notifications | Admin

Fuel Suppliers

Add

search

Name	Status	Credit Balance	Last Transaction	Edit
Company name	Sell Only	65 000	02-17-2017	
Company name	Buy & Sell	125 000	02-17-2017	
Company name	Buy & Sell	14 000	02-17-2017	
Company name	Buy & Sell	37 500	02-17-2017	
Company name	Sell Only	9 000	02-17-2017	
Company name	Sell Only	26 000	02-17-2017	
Company name	Buy & Sell	51 000	02-17-2017	
Company name	Buy & Sell	2 000	02-17-2017	
Company name	Buy & Sell	19 000	02-17-2017	
Company name	Buy & Sell	36 000	02-17-2017	
Company name	Sell Only	83 000	02-17-2017	
Company name	Buy & Sell	71 000	02-17-2017	

☑ Only show "Buy & Sell" and "Sell Only" Fuel Suppliers

Fuel Suppliers List - Internal view

- There is no second level navigation for Internal users
- Add button opens Add Fuel Supplier window
- Link opens Fuel Supplier details
- Pencil opens Edit view of Fuel Supplier details
- Sorted Alphabetically
- Checkbox is selected by default

Lock the table headings so that they are always visible

A Web Page

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Dashboard | **Fuel Suppliers** | Account Activity | Notifications | Admin

Air Liquide Ltd.

Corp. Address: 612 Wharf Avenue, Calgary AB, T1X 0L6

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search

Name	Role	Email	Phone	Status	Edit
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Mariah Maclachlan	Analyst	m.maclachlan@company.ca	250-763-4156	Active	

☑ Only show Active Contacts

Correspondence

Add

search

Document Name	Compliance Year	Upload Date	Contact	Organization	Notes
2017 Compliance Report	2017	03-28-2018	Marco Button	Air Liquide	

Contact Activity History

search

Company Information Area
- Clicking Pencil opens the Add/Edit Fuel Supplier window.
- Allows Internal users with correct permissions to change company information

Lock the table headings so that they are always visible

Contacts (4 rows)
- Add, Edit and View controls are available to Internals with the right role/ permissions
- Link opens read-only view of Contact
- Pencil Opens editable view of Contact
- Default Sort aphabetically by first name

Correspondence (4 rows)
- Add, View and View Notes controls are available to Internals with the right role/ permissions
- Link opens file/offers to download
- View icon opens Notes in a modal dialog
- Default Sort: reverse chronological by Upload Date

Contact Activity Log - used to be History (table not shown) (4 rows)
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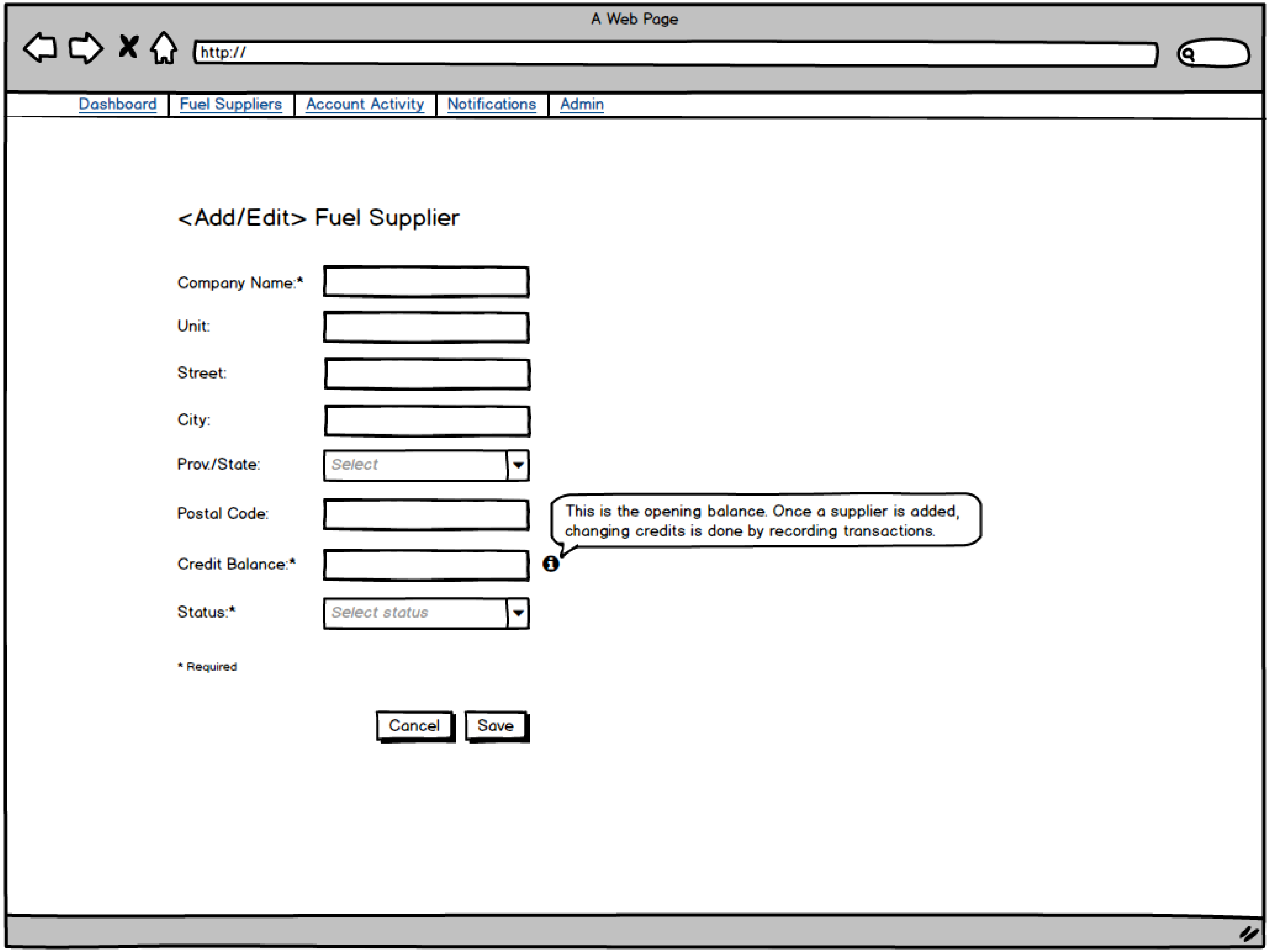
- Rescinded a credit transfer proposal
- Added <contact name>
- Updated <contact name>
- **Made <contact name> Inactive**
- Uploaded <document name>
- Downloaded <document name>

Default Sort is reverse chronological
Columns:
- Contact
- Description
- Date



Add/Edit Fuel Supplier - Internal with correct role/permissions

Same contents as the info Area on Fuel Supplier details screen

- Credit Balance is the opening number of credits. On Save, this field becomes static text and cannot be edited without recording a transaction.
- Status has 3 options:
  - Sell Only
  - Buy and Sell
  - Not able to Sell or Buy

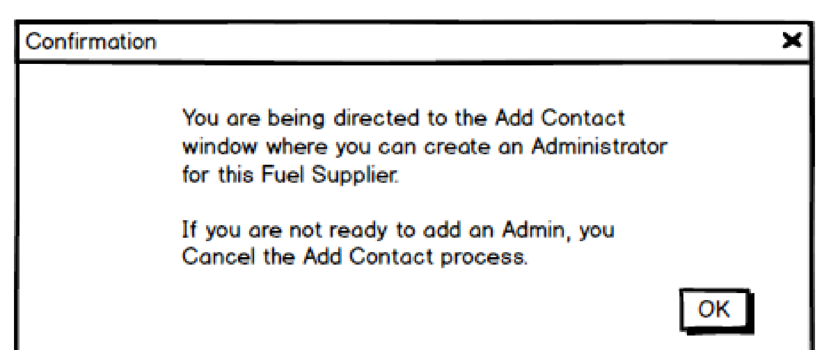
When Save is clicked, display a notification that they will be taken to the Add Contact window so they can create an Admin user.

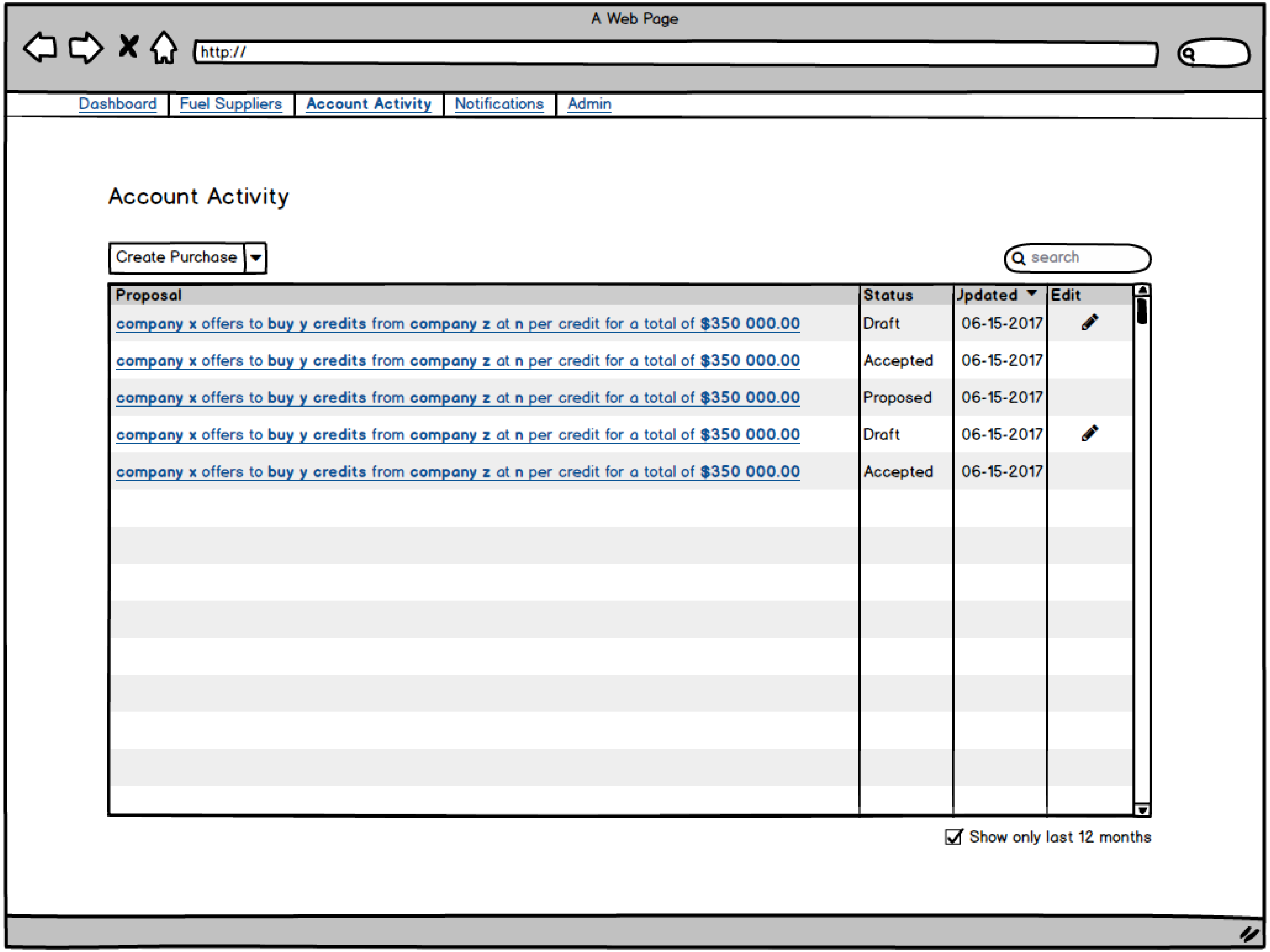
If possible, include a Do not show this message again checkbox.

In-line Validations
Company name
Enter the company's name

Credit Balance
Enter the number of credits the company has

Status
Select the company's current status





The Create button has 2 possible states for External users

- Create Purchase
- Create Sale

User can click on the button to trigger the action or open the drop-down and select a different option to open the transfer window

Default Sort is by Last Updated, newest first

Pencil icon is available to External users with the appropriate role - transfer must have Draft status

Link opens the transfer for any External user with the appropriate role (Controls in the Transfer window will be based on user's role and transfer's status - e.g., Draft items would be editable).

Show only last 12 months checkbox

- Filters the list. It is checked by default.
- Do we need this filter to release? We may want different filtering down the road (will Internal users want to be able to filter by company? Status?)

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Dashboard | Fuel Suppliers | **Account Activity** | Notifications | Admin

Account Activity

Award Credits ▾

search

Activity	Organizatio	Contact	Status	Last Upc ▾	Edit
BC Government awards **y credits** to **company z**	BC Gov	First Last	Draft	06-15-2017	
company x offers to **buy y credits** from **company z** at **n** per credit for a tota	Biz name	First Last	Accepted	06-15-2017	
company x offers to **buy y credits** from **company z** at **n** per credit for a tota	BC Gov	First Last	Recommenc	06-15-2017	
BC Government retires **y credits** from **company z**	BC Gov	First Last	Draft	06-15-2017	
company x offers to **buy y credits** from **company z** at **n** per credit for a tota	Biz Name	First Last	Accepted	06-15-2017	

☑ Show only last 12 months

The sam ewindow is used for Internal and External users but the contents will vary

The Create button has 3 possible states for Internal users

Internal user buttons

- Award Credits
- Retire Credits
- Validate Credits

User can click on the button to trigger the action or open the drop-down and select a different option to open the transfer window

Lock the table headings so that they are always visible

Industry transfers are not visible to gov if they have any of these statuses:

- Draft
- Proposed
- Rescinded
- Refused

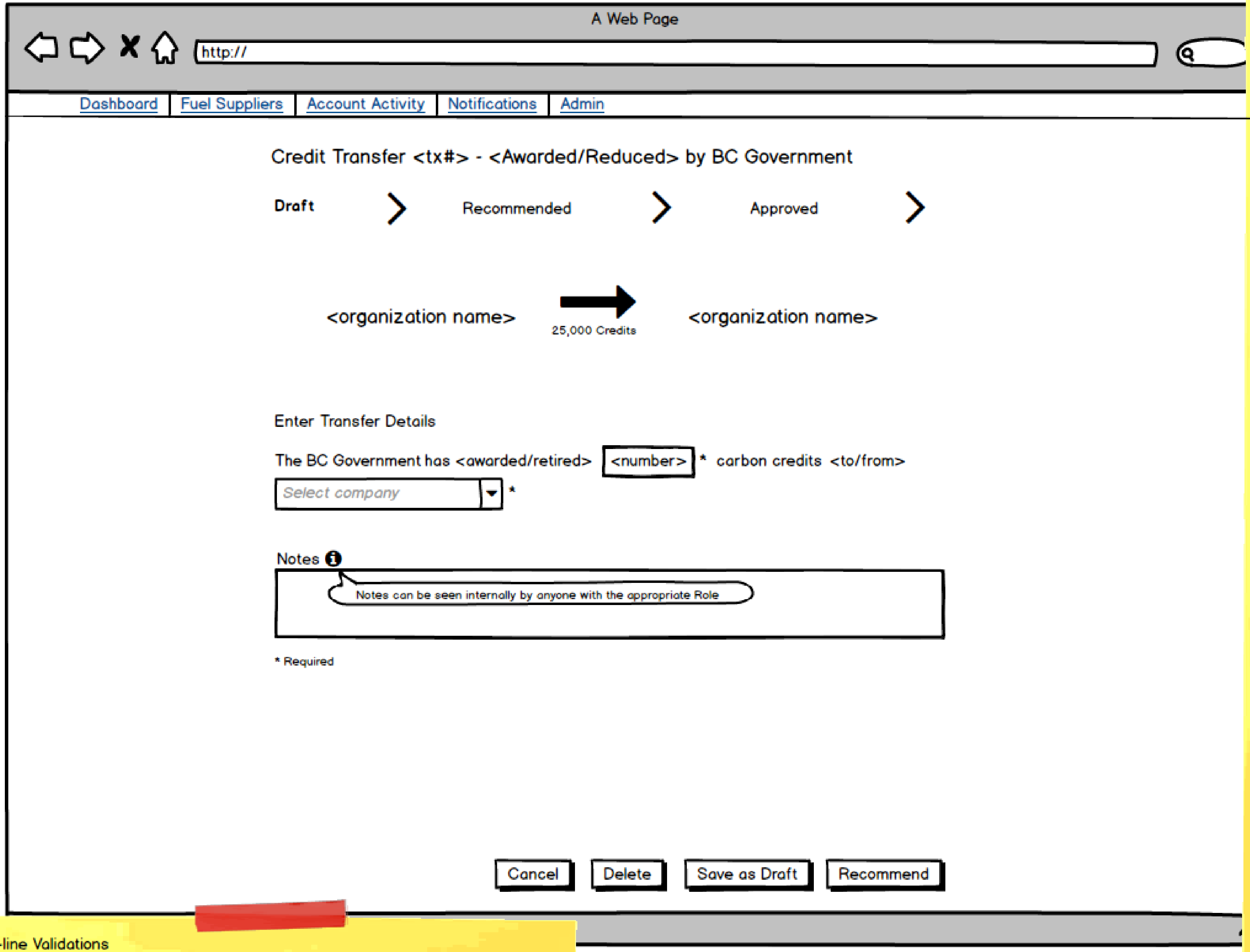
Default Sort is by Last Updated, newest first

Pencil icon is available to Internal users with the appropriate role

Link opens the transfer for any Internal user with the apprpriate role (Controls in the Transfer window will be based on role and transfer status)

Show only last 12 months checkbox

- Filters the list. It is checked by default.
- Do we need this filter to release? We may want different filtering down the road (will Internal users want to be able to filter by company? Status?)



Award/Retire screen
Only BC Govt employees have access to this screen.

Heading
Credit Transfer can have the following possible configurations
- Awarded by BC Government
- Reduced by BC Government
- Validation by BC Government

Progress/Tracking Graphic - States:
- Draft
- Recommended
- Sent

Transfer Graphic:
- Credit donor is always on the left - Gov for awards.
- Credit recipient is always on the right - Gov for retired credits.
- Information populates as the form is completed.

Transfer Details:
- Auto-populate BC Government.
- Author enters number or credits being transferred and selects the company
- **Need to clarify language LCFB wants to use - validations**

History
- Will appear once a draft is saved.
- This history is only visible to BC Govt

Buttons
- Cancel - returns to the Account Activity list view
- Delete only visible for Draft status transactions. Removes the transaction from the system. returns user to the Account Activity list
- Save as Draft - saves a copy of the transaction and returns user to the Account Activity list view
- Recommend
  - notifies the Director that the transfer is ready to be approved.
  - returns user to the Account Acitivity list view
  - In order to Recommend, the user must provide notes for the Director. Use in-line validation below the Notes box

Notes
- Can only be seen by BC Govt employees with correct permissions/role

In-line Validations

<number>
Enter the number of credits

Select company
Select a company for this transaction

Notes
Include a note explaining this tranfer

Do we need a validation for the company selected or can any company be chosen in this context?

A Web Page

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Dashboard | Fuel Suppliers | Account Activity | Notifications | Admin

Credit Transfer <tx#> - <Awarded/Reduced> by BC Government

Draft > **Recommended** > Approved >

<organization name> → <organization name>

25,000 Credits

Enter Transfer Details

The BC Government has <awarded/retired> 10,000 carbon credits <to/from> <company name>.

Notes

Notes can be seen internally by anyone with the appropriate Role

* Required

History

Status	Date ▾	Contact	Credits	Notes
Recommended	06-26-2017	<name>	10 000	
Draft	06-23-2017	<name>	10 000	
Draft	06-18-2017	<name>	15 000	

Cancel | Retract

Award/Retire screen
Only BC Govt employees have access to this screen.

Heading
Credit Transfer can have the following possible configurations
- Awarded by BC Government
- Reduced by BC Government
- Validation by BC Government

Progress/Tracking Graphic - States:
- Draft
- Recommended
- Sent

Transfer Graphic:
- Credit donor is always on the left - Gov for awards.
- Credit recipient is always on the right - Gov for retired credits.
- Information populates as the form is completed.

Transfer Details:
- read-only string
- **Need to clarify language LCFB wants to use - validations**

History
- This history is only visible to BC Govt

Buttons
- Cancel - returns to the Account Activity list view
- Retract - works like Rescind.
  - Closes the transaction and changes status to Retracted.
  - Cannot be edited further

Notes
- Can only be seen by BC Govt employees with correct permissions/role

In-line Validations

<number>
Enter the number of credits

Select company
Select a company for this transaction

Notes
Include a note explaining this tranfer

Do we need a validation for the company selected or can any company be chosen in this context?

A Web Page

http://

Dashboard | Fuel Suppliers | Account Activity | Notifications | Admin

Credit Transfer <tx#> - <Awarded/Reduced> by BC Government

Draft › **Recommended** › Approved ›

<organization name> → 25,000 Credits → <organization name>

Enter Transfer Details

The BC Government has <awarded/retired> 10,000 carbon credits <to/from> <company name>.

Notes*

Notes can be seen by Suppliers and internals with the appropriate Role

* Required

History

Status	Date	Contact	Credits	Notes
Recommended	06-26-2017	<name>	10 000	
Draft	06-23-2017	<name>	10 000	
Draft	06-18-2017	<name>	15 000	

Cancel | Decline | Approve

In-line Validations

<number>
Enter the number of credits

Select company
Select a company for this transaction

Do we need a validation for the company selected or can any company be chosen in this context?

Award/Retire screen
Only BC Govt employees have access to this screen.

Heading
Credit Transfer can have the following possible configurations
- Awarded by BC Government
- Reduced by BC Government
- Validation by BC Government

Progress/Tracking Graphic - States:
- Draft
- Recommended
- Sent

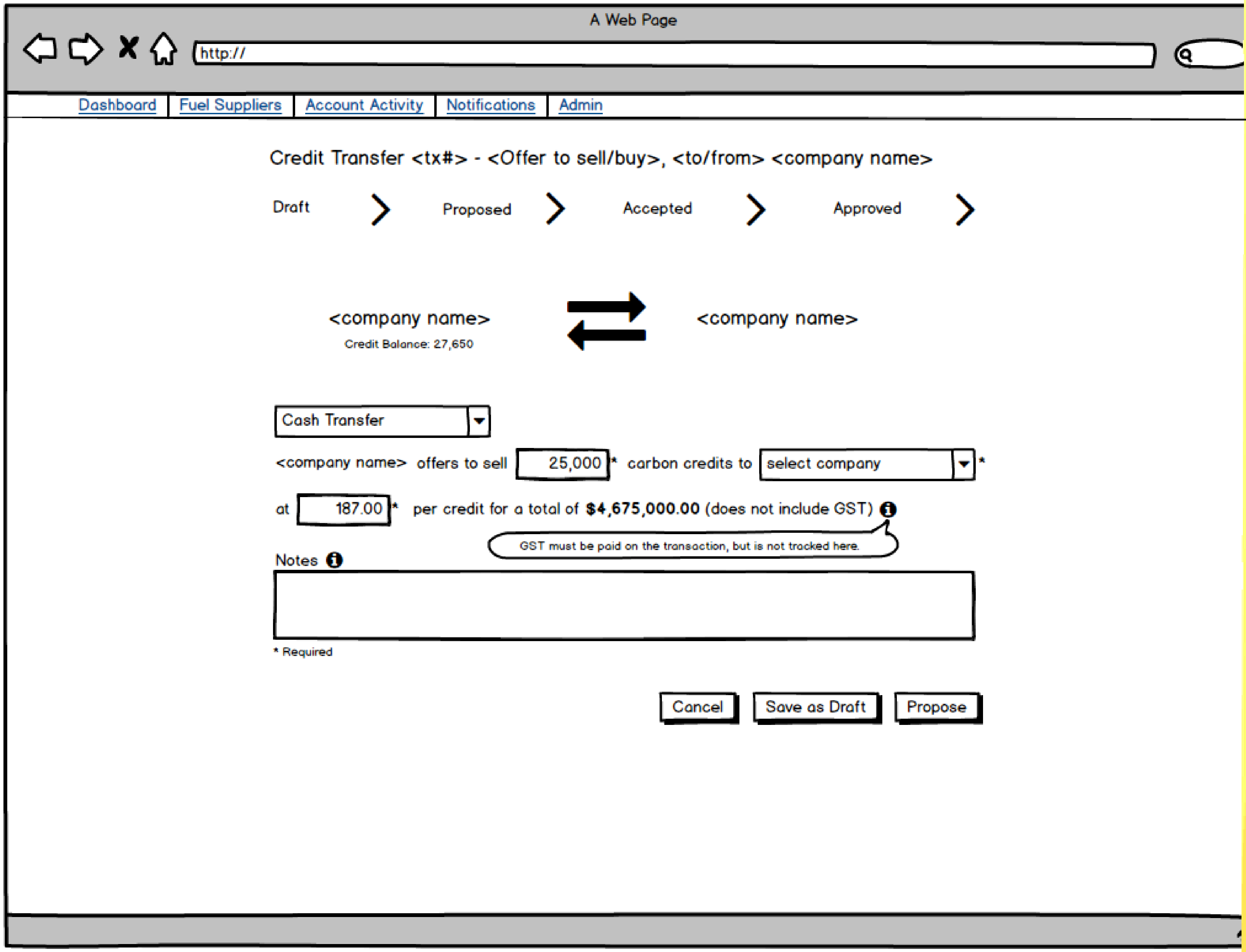
Transfer Graphic:
- Credit donor is always on the left - Gov for awards.
- Credit recipient is always on the right - Gov for retired credits.
- Information populates as the form is completed.

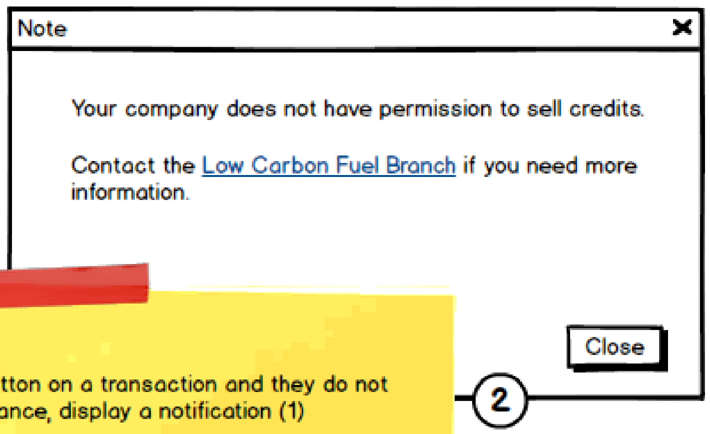
Transfer Details:
- Auto-populate BC Government.
- Author enters number or credits being transferred and selects the company
- **Need to clarify language LCFB wants to use - validations**

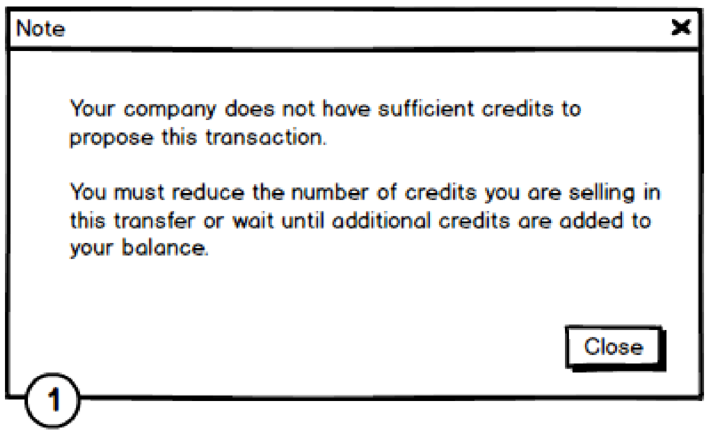
History
- Will appear once a draft is saved.
- This history is only visible to BC Govt

Buttons
- Cancel - returns to the Account Activity list view
- Save as Draft - saves a copy of the transaction and returns user to the Account Activity list view
- Approve
  - transfers the credits to/from company,
  - sends a Notification to the appropriate company and govt Contacts
  - updates status to Approved
  - returns user to the Account Acitivity list view
- Decline
  - no transfer takes place
  - sends notification to the appropriate company and govt contact
  - updates status to Declined
  - returns user to the Account Acitivity list view

Notes
- Visible to anyone who has access to the transaction.







Create view screen

Heading
Transaction Number - system number to identify each tx (doesn't change with status)

Credit Transfer can have the following possible configurations (buy/sell is determined by button used to get here):

- Offer to sell, from <company name>
- Offer to sell, to <company name>
- Offer to buy, from <company name>
- Offer to buy, to <company name>
- Award from BC Government
- Retired by BC Government

Progress/Tracking Graphic - States:

- No status (nothing indicated until user takes an action)
- Draft
- Proposed
- Accepted/Declined/Withdrawn
- Approved/Rejected

Transaction Graphic:

- Credit seller is always on the left.
- Credit buyer is always on the right.
- When the Initiator is the Seller in a transaction, show their credit Balance under their name. DO NOT SHOW to the Recipient or when the Initiator is the Buyer.
- Information populates as the form is completed.

Select Transfer Type

- Cash Transfer (default)
- Zero Dollar Transfer
- In Lieu of Cash Transfer
- Choosing one will determine the format of the transfer beneath the control. Cash is shown here.

Transfer Details

- Strings in design show Initiator is creating an offer to sell
- Auto-populate the name of the company that the user represents.
- **Is the "Select company" list filtered to show only companies that are permitted to buy or sell, as appropriate?**
- Total is calculated using number of credits and price per credit
- Include a tool tip explaining that GST is not included in Total (on-click)

History

- Will appear once a draft is saved

Buttons

- Cancel - returns to the Account Activity list **(do we want a confirmation if they have entered anything?)**
- Save as Draft
  - Saves a copy of the transaction
  - Sends notification as needed

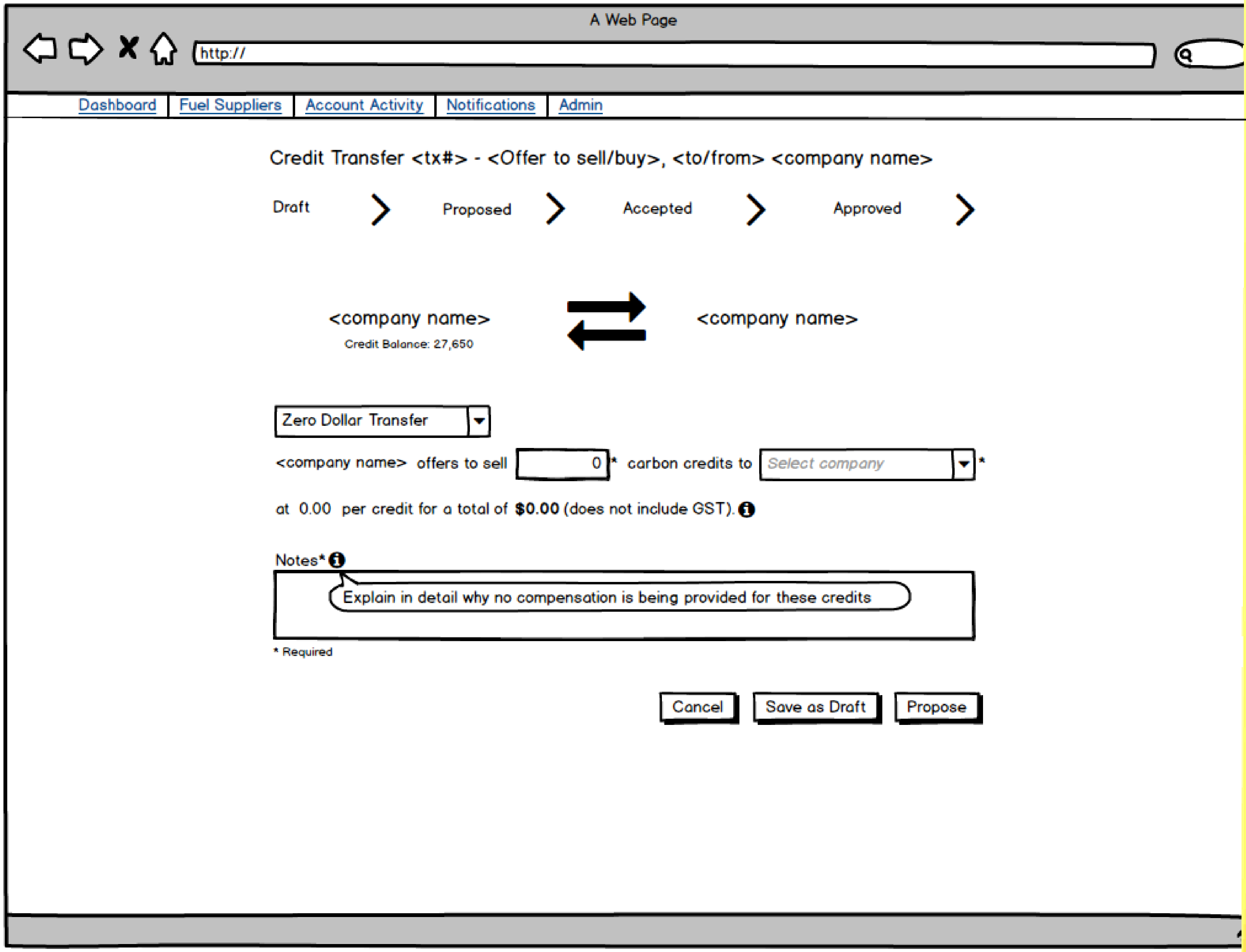
Validations
Propose
If a Seller clicks the Propose button on a transaction and they do not have enough credits in their Balance, display a notification (1)

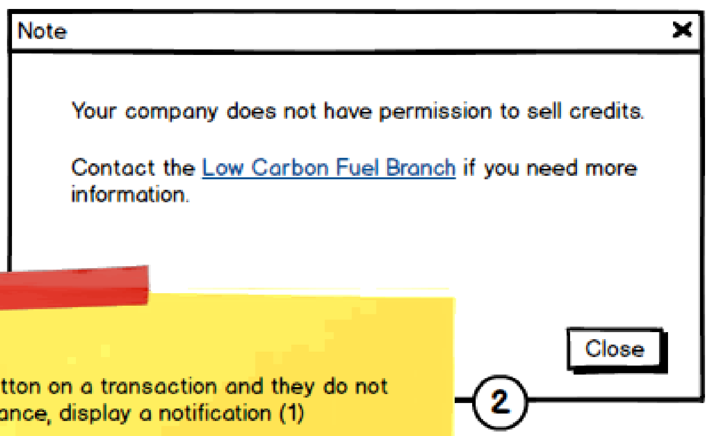
If an Initiator clicks Propose to sell credits and they do not have Sell Only or Buy and Sell status, display a notification (2) Use generic LCFB email for mailto

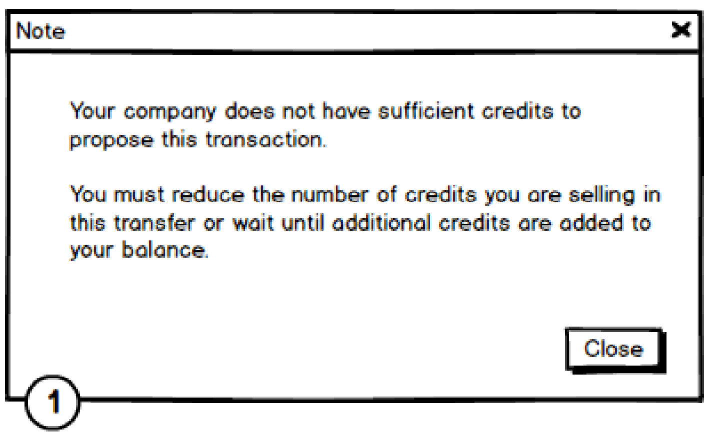
In-line Validations
<number of credits>
Enter the number of credits

Select company
Select a company

<price/credit>
Enter the price per unit for credits







Create view screen

Heading
Transaction Number - system number to identify each tx (doesn't change with status)

Credit Transfer can have the following possible configurations (buy/sell is determined by button used to get here):
- Offer to sell, from <company name>
- Offer to sell, to <company name>
- Offer to buy, from <company name>
- Offer to buy, to <company name>
- Award from BC Government
- Retired by BC Government

Progress/Tracking Graphic - States:
- No status (nothing indicated until user takes an action)
- Draft
- Proposed
- Accepted/Declined/Withdrawn
- Approved/Rejected

Transaction Graphic:
- Credit seller is always on the left.
- Credit buyer is always on the right.
- When the Initiator is the Seller in a transaction, show their credit Balance under their name. DO NOT SHOW to the Recipient or when the Initiator is the Buyer.
- Information populates as the form is completed.

Select Transfer Type
- Cash Transfer (default)
- Zero Dollar Transfer
- In Lieu of Cash Transfer
- When Zero Dollar or In Lieu is selected, the Notes section becomes a required field and the tip changes as shown.

Transfer Details
- Strings in design show Initiator is creating an offer to sell
- Auto-populate the name of the company that the user represents.
- **Is the "Select company" list filtered to show only companies that are permitted to buy or sell, as appropriate?**
- Total is calculated using number of credits and price per credit
- Include a tool tip explaining that GST is not included in Total (on-click)

History
- Will appear once a draft is saved

Buttons
- Cancel - returns to the Account Activity list **(do we want a confirmation if they have entered anything?)**
- Save as Draft
  - Saves a copy of the transaction
  - Sends notification as needed
  - Returns the user to the Account Activity list
- Propose
  - Sends the transfer to the Recipient
  - Saves state as Proposed.
  - Sends notification as needed
  - Returns user to Account Activity list view.

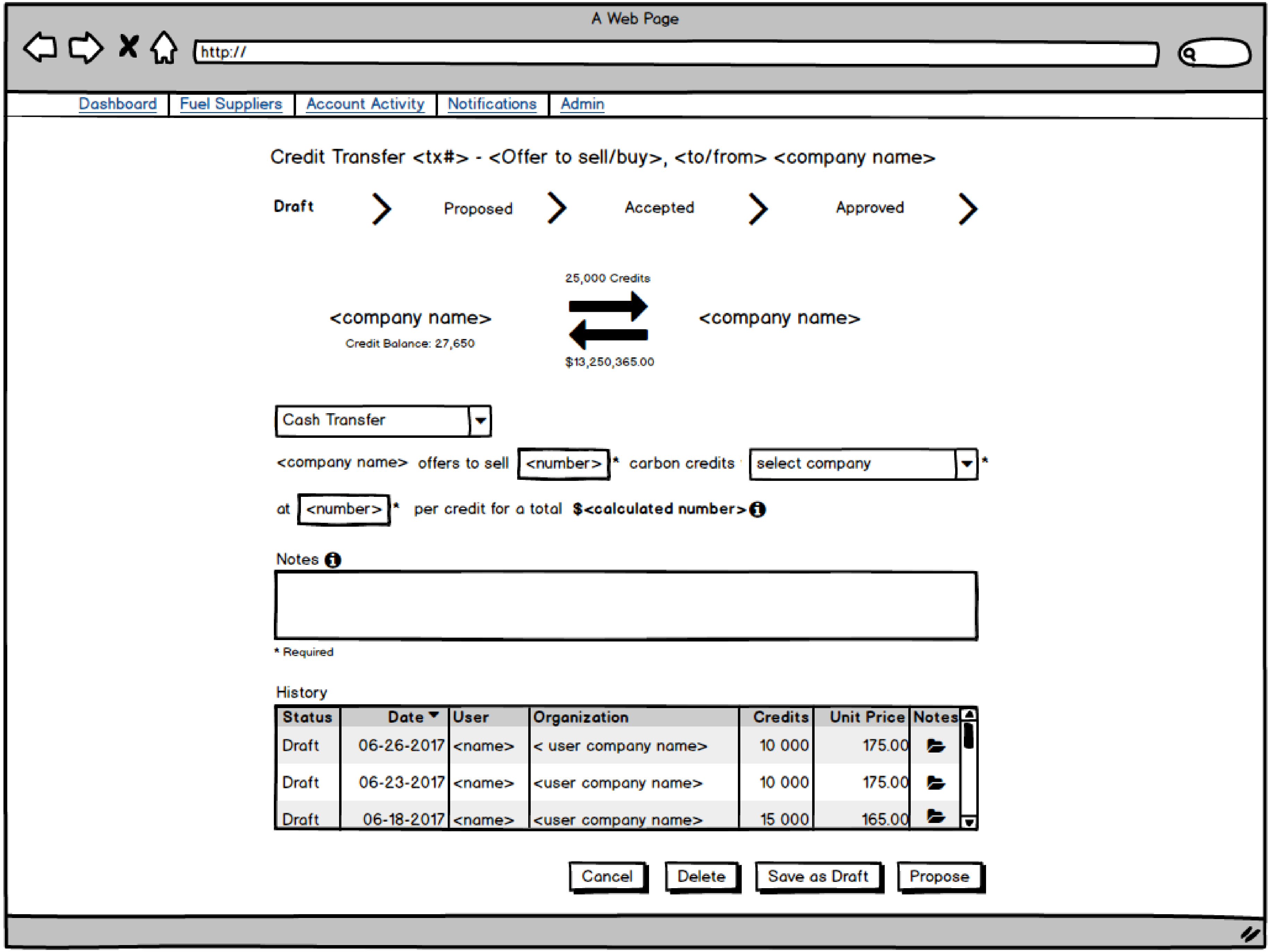
Validations
Propose
If a Seller clicks the Propose button on a transaction and they do not have enough credits in their Balance, display a notification (1)

If an Initiator clicks Propose to sell credits and they do not have Sell Only or Buy and Sell status, display a notification (2) Use generic LCFB email for mailto

In-line Validations
<number of credits>
Enter the number of credits

Select company
Select a company

<price/credit>
Enter the price per unit for credits



Edit screen
Only the company that created the transaction has access to this screen.

Behaves the same as the Create view except that there is now a **Delete** button

Notes field is always blank - it is for current user to add new notes.

To view notes, user needs to click on the icon in the Notes column of the History table

A Web Page

http://

Dashboard | Fuel Suppliers | Account Activity | Notifications | Admin

Credit Transfer <tx#> - <Offer to sell/buy>, <to/from> <company name>

Draft > **Proposed** > Accepted > Approved >

<company name>
Credit Balance: 27,650

25,000 Credits

$13,250,365.00

<company name>

Transfer Details

Air Liquide offers to sell **6000** carbon credits to **Imperial Oil** at **185.00** per credit for a total of **$<calculated number>**

Notes

Notes are visible to your company and the recipients

History

Status	Date	User	Organization	Credits	Unit Price	Notes
Proposed	06-26-2017	<name>	< user company name>	10 000	175.00	
Draft	06-23-2017	<name>	<user company name>	10 000	175.00	
Draft	06-18-2017	<name>	<user company name>	15 000	165.00	

Cancel | Rescind

Proposed Transfer - Initiator View
This is what an Initiator sees when they open a Proposed transfer.

Progress/Tracking Graphic - States:

- Draft
- Proposed (current state)
- Accepted/Refused/Withdrawn
- Approved/Declined

Transfer Details:

- Transaction is shown as a single string, bolding the Companies, number of credits, price per credit, and total.
- Include a tool tip explaining that GST is not included in Total

Buttons

- Cancel - returns to the Account Activity list view
- Rescind- initiator does not want to proceed with the transfer.
  - Show confirmation message
  - Set status to Rescinded in tables and in progress area.
  - Transfer is locked and cannot be updated.
  - Return user to Account Activity list view.
  - Send Notifications as appropriate

When Rescind is clicked, display a confirmation dialog.

Yes - Set status to Rescinded in tables and in progress area.
- Transfer is locked and cannot be updated.
- Return user to Account Activity list view.
- Send Notifications as appropriate

No - Return to Account Activity list

Note

Rescinding this offer cancels the proposed transfer of credits. The transaction will still be visible to you and the other company, but it cannot be edited or accepted.

Do you want to continue?

No | Yes

A Web Page

http://

[Dashboard](#) | [Fuel Suppliers](#) | [Account Activity](#) | [Notifications](#) | [Admin](#)

Credit Transfer <tx#> - <Offer to sell/buy>, <to/from> <company name>

Draft > **Proposed** > Accepted > Approved >

<company name> — 25,000 Credits / $13,250,365.00 — <company name>

Transfer Details

Air Liquide offers to sell **6000** carbon credits to **Imperial Oil** at **185.00** per credit for a total of **$<calculated number>**

Notes

Notes are visible to your company and the recipients

History

Status	Date	User	Organization	Credits	Unit Price	Notes
Proposed	06-26-2017	<name>	< user company name>	10 000	175.00	

Cancel | Refuse | Accept

Accept/Decline screen
~~Recipient~~ view of a Proposed Transfer

Progress/Tracking Graphic - States:

- Draft
- Proposed (current state)
- Accepted/Refused/Withdrawn
- Approved/Declined

Transfer Details:

- Transaction is shown as a single string, bolding the Companies, number of credits, price per credit, and total.
- Include a tool tip explaining that GST is not included in Total

Buttons

- Cancel - returns to the Account Activity list view
- Refuse - recipient does not want to proceed with the transfer.
  - Set status to Refused in tables and in progress area.
  - Transfer is locked and cannot be updated.
  - Return user to Account Activity list view.
  - Send Notifications as appropriate
- Accept - recipient agrees to the transfer.
  - Status changes to Accepted.
  - Transaction can now be Rejected or Approved by Gov.
  - Send Notifications as appropriate
  - Return user to Account Activity list view.

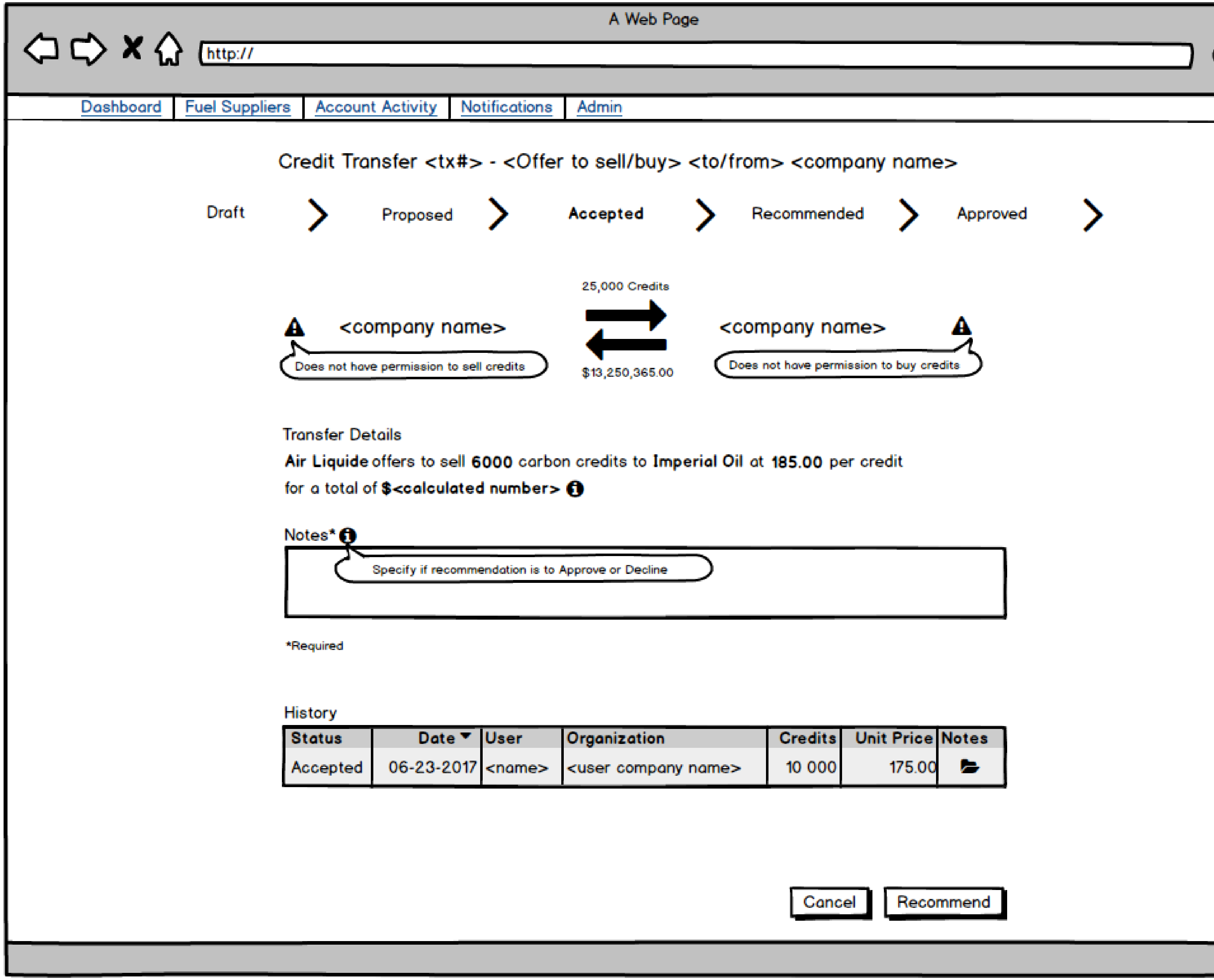
Validations
Accept
If a Seller has received a proposal to sell more credits than they have, and they click Accept, display a notification

Note

Your company does not have sufficient credits to accept this transaction.

You must wait until additional credits are added to your balance or ask the buyer to propose another credit transfer.

Close



Recommend screen
Government view of an Accepted Transfer

Analysts always look at transfer before Director Approves or Declines and they will Recommend to Approve or Decline

Progress/Tracking Graphic - Possible States:

- Draft
- Proposed
- Accepted/Refused/Withdrawn (current state)
- Approved/Declined

Transfer Graphic:

- If a seller does not have permission to sell, flag with a warning icon. Clicking will reveal text below explaining the problem
- If a seller doesn't have sufficient credits for a transfer, flag with an exclamation mark icon. Clicking will reveal text below explaining the problem
- If a seller doesn't have permission to sell AND doesn't have enough credits for the trade, show one exclamation mark icon. Clicking will reveal text below explaining the problems
- If a buyer doesn't have permission to buy credits, show an exclamation mark icon. Clicking will reveal text below explaining the problem.
- If it is a Zero-dollar transfer, flag below the dollar amount with a warning icon. Clicking will open tip explaining "Zero-dollar transfer. Review Notes from Suppliers."

Transfer Details:

- Transaction is shown as a single string, bolding the Companies, number of credits, price per credit, and total.
- Include an info icon. Clicking will reveal text below explaining that GST is not included in transaction Total

Notes.

- Notes are required for a status to change to Recommended - ensures that i a transfer doesn't go to Director without clarifying whether the recommendation is to Approve or Decline.

Buttons

- Cancel - closes the window
- Recommend - sets status to Recommended and notifies the appropriate Internals.
  - Return user to Account Activity list

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http://

Dashboard | Fuel Suppliers | Account Activity | Notifications | Admin

Credit Transfer <tx#> - <Offer to sell/buy> <to/from> <company name>

Draft > Proposed > Accepted > **Recommended** > Approved >

25,000 Credits

<company name> <company name>

Does not have permission to sell credits

$13,250,365.00

Does not have permission to buy credits

Transfer Details

Air Liquide offers to sell **6000** carbon credits to **Imperial Oil** at **185.00** per credit for a total of **$<calculated number>**

Notes

Director's notes are visible to all recipients

History

Status	Date ▾	User	Organization	Credits	Unit Price	Notes
Recommended	06-26-2017	<name>	< user company name>	10 000	175.00	
Accepted	06-23-2017	<name>	<user company name>	10 000	175.00	

Cancel | Decline | Approve

Approve/Reject screen
Government view of an Accepted Transfer

Externals looking at transactions that have been Recommended will only see them in th eprevious Accepted state and can only view notes from Accepted or Draft status, depending on if they are the Initiator or Recipient.

Progress/Tracking Graphic - Possible States:
- Draft
- Proposed
- Accepted/Refused/Withdrawn
- Recommended (current state)
- Approved/Declined

Transfer Graphic:
- If a seller does not have permission to sell, flag with a warning icon. Clicking will reveal text below explaining the problem
- If a seller doesn't have sufficient credits for a transfer, flag with an exclamation mark icon. Clicking will reveal text below explaining the problem
- If a seller doesn't have permission to sell AND doesn't have enough credits for the trade, show one exclamation mark icon. Clicking will reveal text below explaining the problems
- If a buyer doesn't have permission to buy credits, show an exclamation mark icon. Clicking will reveal text below explaining the problem.
- If it is a Zero-dollar transfer, flag below the dollar amount with a warning icon. Clicking will open tip explaining that this is zero-dollar transfer and it should be reviewed carefully.

Transfer Details:
- Transaction is shown as a single string, bolding the Companies, number of credits, price per credit, and total.
- Include an info icon. Clicking will reveal text below explaining that GST is not included in transaction Total

Notes.
- Notes recorded by Director are visible to recipients

Buttons
- Cancel - closes the window
- Decline - sets status to Declined. This transaction is finished. It can only be viewed.
  - Notify both companies
  - Return user to Account Activity list
- Approve - sets status to Approved.This transaction is finished. It can only be viewed.
  - Update buyer and seller credit balances.
  - Return user to Account Activity list
  - Notify both companies?

A Web Page

http://

Dashboard | Fuel Suppliers | Account Activity | **Notifications (6)** | Admin

Notifications

search

Notice	Date ▼	Contact	Organization	Read
BC Government has approved a credit tra	**12-12-2017**	**name**	**BC Gov**	
string	**12-12-2017**	**name**	**BC Gov**	
string	**12-12-2017**	**name**	**BC Gov**	
string	**12-12-2017**	**name**	**Air Liquide**	
string	**12-12-2017**	**name**	**Air Liquide**	
string	**12-12-2017**	**name**	**Air Liquide**	
string	12-12-2017	name	Air Liquide	
string	12-12-2017	name	HydroTheory	
string	12-12-2017	name	HydroTheory	
string	12-12-2017	name	HydroTheory	
string	12-12-2017	name	HydroTheory	
string	12-12-2017	name	Very Good Fuels	
string	12-12-2017	name	Very Good Fuels	
string	12-12-2017	name	Very Good Fuels	
string	12-12-2017	name	Very Good Fuels	

☑ Only show last 12 months

Notifications

Notification tab is bold when there are unread notifications

Next to the tab label is a number in parentheses showing number of unread notifications.

Unread items are bold in the list and display a closed envelope in the Mark Read column

- Raj, are you happy with just the envelope to indicate state?
- Clicking on the View link takes the user to the transaction page and sets status as "read" for that user.
- Clicking the envelope changes the status to read and the icon to an open envelope
- Read items cannot be changed back to unread

A Web Page

http://

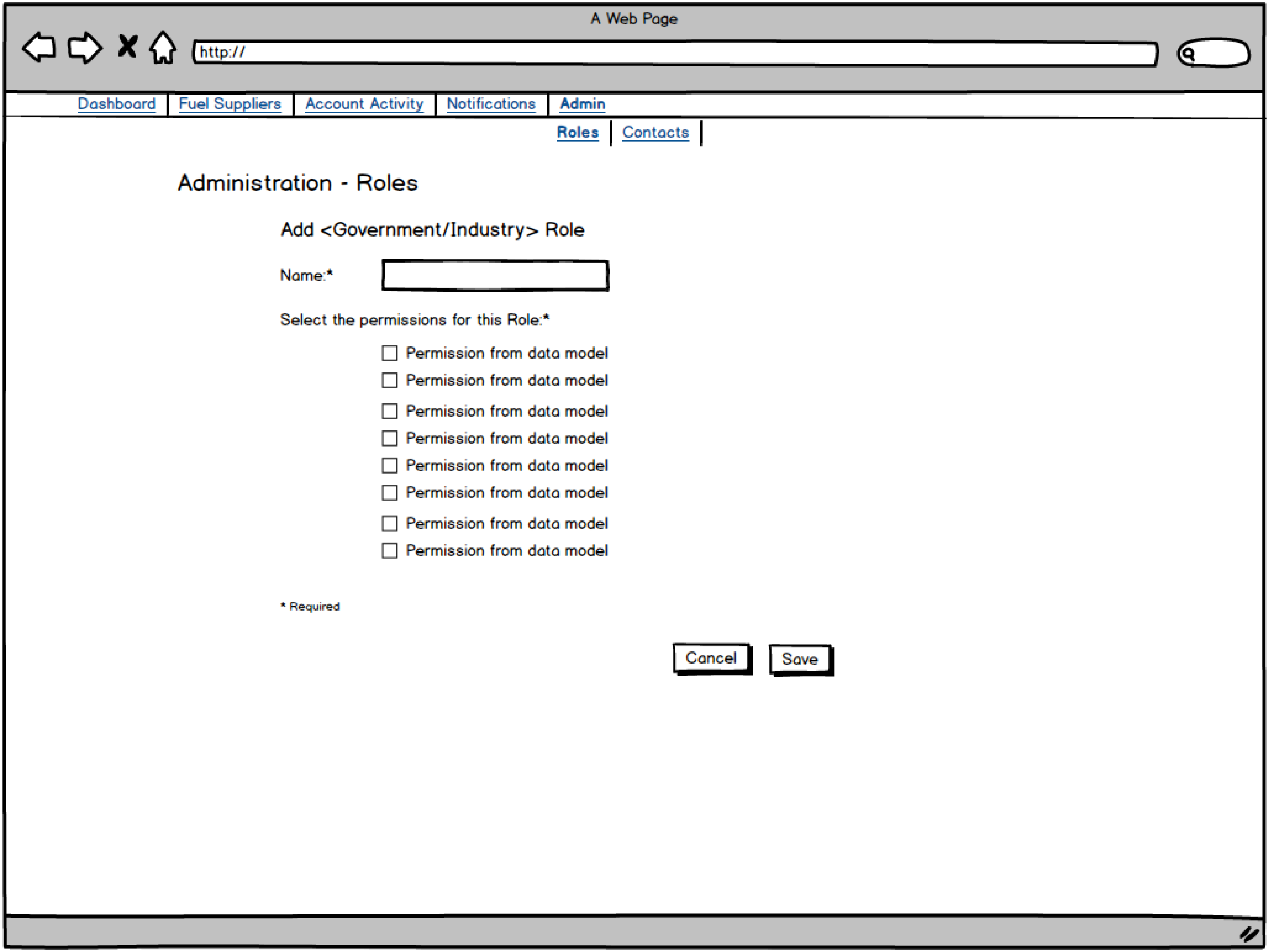
Dashboard | Fuel Suppliers | Account Activity | Notifications | **Admin**

Roles | Contacts

Administration - Roles

Add Governmet Role ▾

Name	Governmen ▾	Permissions	Edit
Admin	Yes		✎
Analyst	Yes		✎
Director	Yes		✎
Admin	No		✎
Analyst	No		✎
Director	No		✎


A Web Page
http://
Dashboard
Fuel Suppliers
Account Activity
Notifications
Admin
Roles
Contacts
Administration - Roles
Add <Government/Industry> Role
Name:*
Select the permissions for this Role:*
Permission from data model
Permission from data model
Permission from data model
Permission from data model
Permission from data model
Permission from data model
Permission from data model
Permission from data model
* Required
Cancel
Save

A Web Page

http://

[Dashboard](#) | [Fuel Suppliers](#) | [Account Activity](#) | [Notifications](#) | [Admin](#)

[Roles](#) | [Contacts](#)

Administration - Contacts

Add Governmet Contact ▾

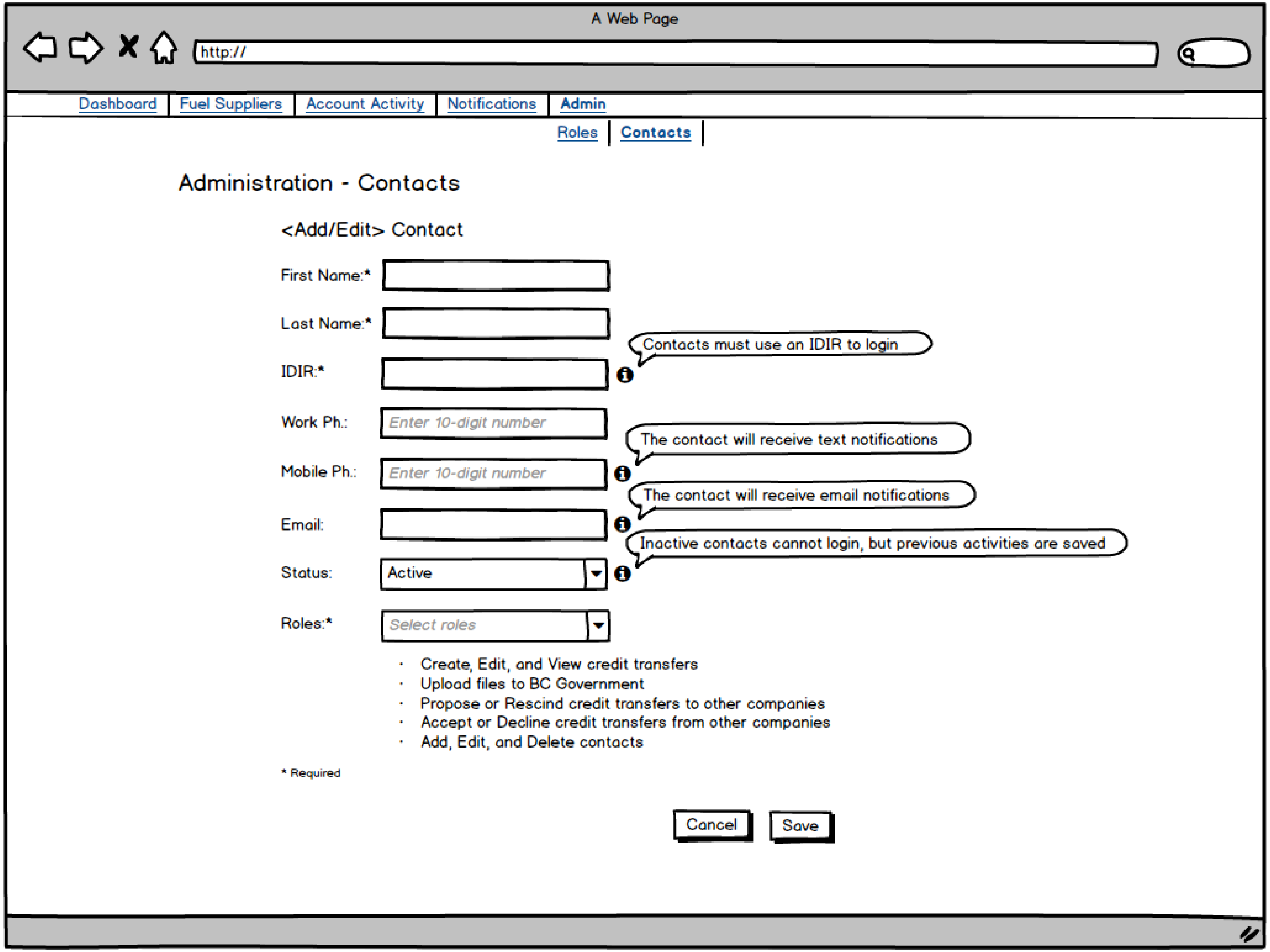
search

Name	BCeID/IDIR	Organization	Role	Status	Edit
Giacomo Guilizzoni	number	BC Gov	Admin	Active	✎
Giacomo Guilizzoni	number	BC Gov	Analyst	Active	✎
Giacomo Guilizzoni	number	BC Gov	Director	Active	✎
Giacomo Guilizzoni	number	Air Liquide	Analyst	Active	✎
Giacomo Guilizzoni	number	Air Liquide	Analyst	Inactive	✎
Giacomo Guilizzoni	number	Air Liquide	Director	Active	✎
Giacomo Guilizzoni	number	Air Liquide	Admin	Active	✎
Giacomo Guilizzoni	number	HydroTheory	Analyst	Active	✎
Giacomo Guilizzoni	number	HydroTheory	Analyst	Active	✎
Giacomo Guilizzoni	number	HydroTheory	Admin	Active	✎
Giacomo Guilizzoni	number	HydroTheory	Analyst	Inactive	✎
Giacomo Guilizzoni	number	Very Good Fuels	Director	Active	✎
Giacomo Guilizzoni	number	Very Good Fuels	Admin	Active	✎
Giacomo Guilizzoni	number	Very Good Fuels	Analyst	Active	✎
Giacomo Guilizzoni	number	Very Good Fuels	Admin	Active	✎

Add Contact

Like the transfers, users can sxelect which contact type they are creating and the Add screen will be configured appropriately.

Add Government Contact
Add Supplier Contact



Add/Edit Gov Contact

If a Mobile number is entered, the user wil receive Text notifications
If an Email address is provided, the user will receive Email notifications

If Show contact in Fuel Suppliers list is selected, show the "Do not send email notifications" checkbox - this allows users to include their email in the list and opt out of email notifications (**only 1 user per company - we could leave this off and wait for them to request the option**)

As Gov Roles are selected from the muti-select list, display the Contact's permissions below the control.

Save - creates the Contact record/profile returns user to the Contacts table.

Cancel - returns the user to the Contacts table

Should the Add/Edit string Say Add/Edit Government Contact? We have the IDIR field but it might be better to say it at the top.

A Web Page

http://

Dashboard | Fuel Suppliers | Account Activity | Notifications | **Admin**

Roles | **Contacts**

Administration - Contacts

Contact

First Name: John

Last Name: Doe

IDIR: john.doe

Work Ph.: 555-555-5555

Mobile Ph.: 555-555-5554

Email: john.doe@gov.bc.ca

Status: Active

Roles: Admin, Analyst, Director

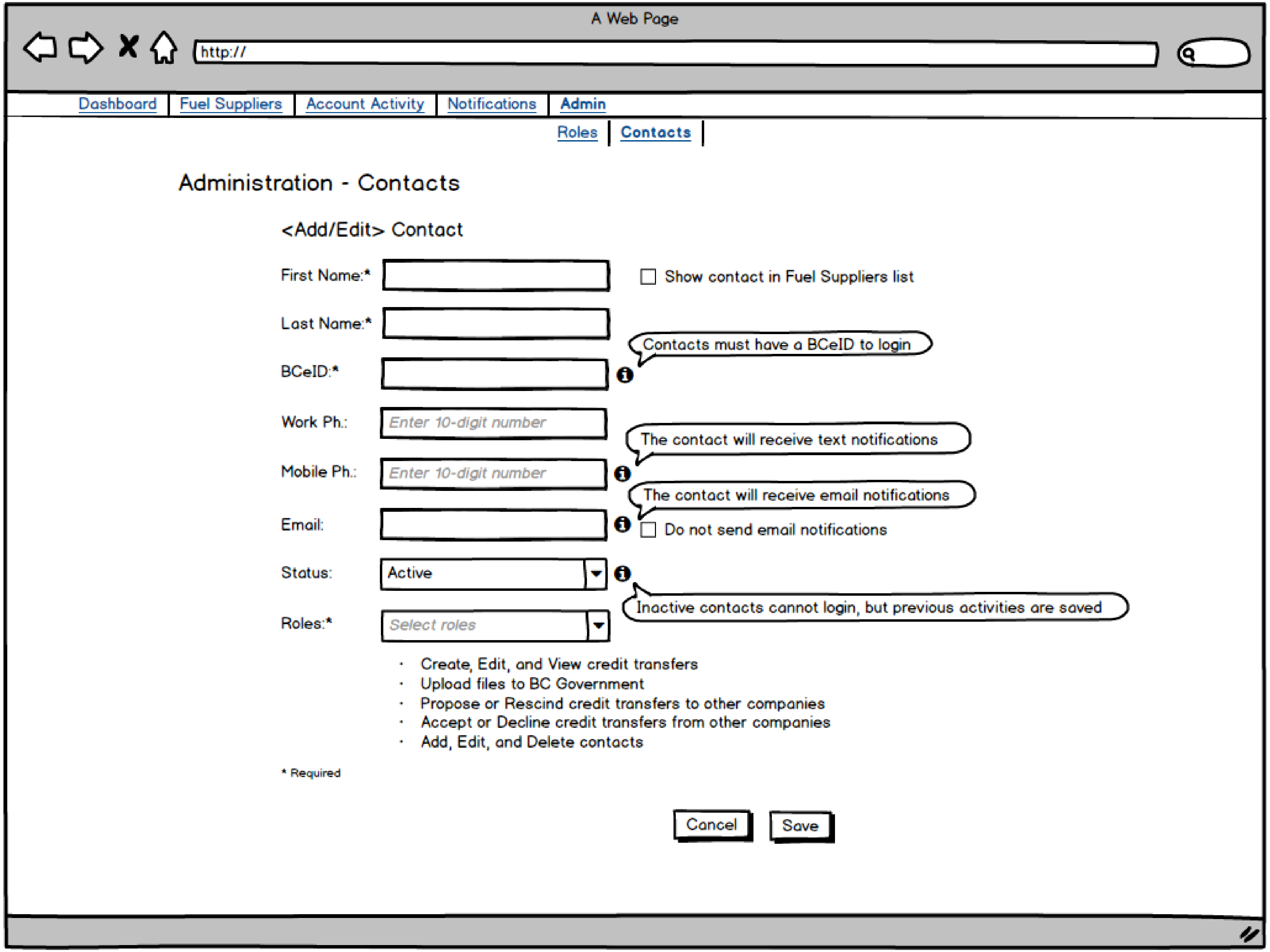
- Create, Edit, and View credit transfers
- Upload files to BC Government
- Propose or Rescind credit transfers to other companies
- Accept or Decline credit transfers from other companies
- Add, Edit, and Delete contacts

Close

View Contact
This is the same window that is available to Industry Admins

If user has edit permissions, they can click the pencil icon - this then becomes the Add/Edit window

Close - returns the user to the Contacts table



Add/Edit Contact
This is the same window that is available to Industry Admins

If a Mobile number is entered, the user wil receive Text notifications
If an Email address is provided, the user will receive Email notifications

If Show contact in Fuel Suppliers list is selected, show the "Do not send email notifications" checkbox - this allows users to include their email in the list and opt out of email notifications (**only 1 user per company - we could leave this off and wait for them to request the option**)

As Industry Roles are selected from the muti-select list, display the Contact's permissions below the control.

Save - creates the Contact record/profile returns user to the Contacts table.

Cancel - returns the user to the Contacts table

Should the Add/Edit string Say Add/Edit Supplier Contact? We have the BCeID field but it might be better to say it at the top.

A Web Page

http://

Dashboard | Fuel Suppliers | Account Activity | Notifications | **Admin**

Roles | **Contacts**

Administration - Contacts

Contact

First Name: John - Contact appears in Fuel Suppliers list

Last Name: Doe

BCeID: 1987654325

Work Ph.: 555-555-5555

Mobile Ph.: 555-555-5554

Email: john.doe@company.com - Does not receive email notifications

Status: Active

Roles: Admin, Analyst, Director

- Create, Edit, and View credit transfers
- Upload files to BC Government
- Propose or Rescind credit transfers to other companies
- Accept or Decline credit transfers from other companies
- Add, Edit, and Delete contacts

Close

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This is the same window that is available to Industry Admins

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Close - returns the user to the Contacts table