

Application System Overview & Use Cases

Version 1 (DRAFT)

1. Overview

The Application will be developed to facilitate a bid management process for property managers on behalf of associations to select the best fit vendor for a given job. Jobs below a configurable threshold will have an accelerated work order process and jobs above that same threshold will have a project appropriate bid approval process. Vendors will subscribe to the service on an annual fee basis to be eligible to be selected to bid for work within a set radius of their location based on their available services. Based on their bid a Vendor can win work and will pay a win fee for each job awarded to them. The Fee will be calculated based on a configurable fee table based on the dollar value of the job. The fee table could be different for different associations. Per the table, a portion of the win fee will be remitted back to the awarding association to encourage use of the system for all jobs. Vendors internal to an association will not pay a subscription or win fee when selected. To be considered an internal vendor the vendor address must be identical to the property and they will not be available to be selected for work at any other properties regardless of distance.

2. Use Cases by Subtask

2.1. Registrations

2.1.1. Manager Registers with the system

2.1.1.1. Any Platform

2.1.1.2. Manager downloads app to mobile device or accesses URL to initiate registration. Manager completes registration form including the selection of one or many properties. If property is not available, one can be setup by the manager after approved registration. Registration is pending until an Admin approves registration and any property affiliation.

2.1.2. Vendor Registers with the system

2.1.2.1. Any Platform

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2.1.2.2. Vendor downloads app to mobile device or accesses URL to initiate registration. Vendor completes registration form including the payment of subscription fee with valid credit card. Credit card must be authorized for auto pay of annual subscription until canceled by the Vendor. Vendor location is required. Admin has ability to reject vendor and refund subscription if needed.

2.1.2.3. Vendor can maintain their record by adding or removing service Categories from the available list or maintaining data or profile picture. Vendor address cannot be updated more often than three times a year without admin reset.

2.1.2.4. Registration URL can be delivered to a vendor list in mass by admin with upload of email addresses and vendor names. (V1 Manual process, V2 Automated from system email address)

2.1.2.5. Vendor cannot search for jobs without an active subscription, insurance certificate and license in provided

2.2. Property Management

2.3. Bid Request/Proposal Process

2.3.1. Manager Initiates a Job:

2.3.1.1. Project Workflow:

2.3.1.1.1. Manager creates a project record associated to a property.

2.3.1.1.2. Manager can search for vendors (by name, service Category) and invite them to bid by adding them to the vendor list.

2.3.1.1.2.1. Only Vendors that have specified a service area that covers the property address will be available to the manager for selection.

2.3.1.1.3. Vendors can see the project available to be bid on if it is within their specified service area, but cannot see what property or manager it is for.

2.3.1.1.4. Many Vendors can submit bids.

2.3.1.1.5. Manager reviews bids and awards the project to one vendor and instantly the vendor is charged a win fee via credit card.

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2.3.1.2. Workorder workflow:

2.3.1.2.1. Manager can search for vendors (by name, service Category or distance) and invite them to bid by adding them to the vendor list or Vendors within a specified distance to the property can see the project available in their project search results. Many Vendors can submit bids.

2.3.1.2.2. Workorders can be single source

2.3.2. Manager Bid Review

2.3.2.1. Manager can review, accept or reject any bids submitted to the job (for projects at least three bids must be submitted prior to a manager accepting a bid.

2.3.2.2. Manager Award Work (Selection)

2.3.2.3. Only one bid can be accepted per job.

2.3.3. Vendor Pays win Fee

2.3.3.1. Win fee is assessed from the vendor at the time of the managers acceptance. If win fee payment is unsuccessfully processed the acceptance will be "pending". **More error handling needed here**

2.3.4. Association receives portion of Win Fee

2.4. Manager's Activity

2.5. Vendor's Activity

2.5.1. Vendor reviews selections for bidding by service Category

2.5.2. Vendor Bid Submittal

2.5.2.1. Vendor can submit, modify or retract a bid until it is accepted (win) or rejected (loss) by a manager. Once a bid has won or lost it can no longer be modified.

2.6. Admin's Activity

2.6.1. Admin Setup up a Property

2.6.1.1. Web Platform

2.6.1.2. Admin adds property making it available for selection by manager. Admin can add and remove managers from a property.

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2.6.2.Admin Setup of Association

2.6.2.1. Web Platform

2.6.2.2. Admin adds association. Admin can add and remove properties to an association.

2.6.3.Admin sets up a win fee table for an Association

2.6.4.Admin Manages max search radius for vendors

2.6.5.Admin Maintains Service Categories

2.7. Other General Functionality (Dashboard)

2.8. Mobile API

2.9. Payment Integration

2.10. Manager Mobile View

2.11. Vendor Mobile View

2.12. System Inactivates Vendor with Expired Credit Card

2.13. System Processes Auto Vendor Subscription Renewal

3. Definitions

3.1. App = Application

3.2. iOS = iOS 13.3 or Greater

3.3. Android = Android 10 or Greater

3.4. SQL = Microsoft SQL Server 2019 or Greater

3.5. CC = Valid and Active Credit Card associated to a Vendor Record

3.6. Manager = Property manager can manage one or many properties

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3.7. Property = Can be managed by one or many managers and is affiliated to an association

3.8. Association = Affiliated to one or more properties.

3.9. Service Category = List of types of work that are required to complete the job. A Vendor must have these service Categories listed on their vendor profile to submit a bid to a job. A list of Service Categories in the system will be maintained in the system by the admin that is available as a system wide enumeration list that can be selected by any user that is filling out a form that includes the selection of a service Category. No free form service Categories should be accepted in any form except when an admin is adding or modifying the list of available service Categories in the system.

3.10. Bid = Response from Vendor to Manager proposing an estimated cost for completion of the work described in the job

3.11. Awarded = The moment a Manager accepts a bid from a vendor for a project or workorder.

3.12. Win Fee = Fee charged to Vendor Credit Card at the time a bid is awarded to a vendor

3.13. Jobs = There are two types of "Jobs" in the system:

3.13.1. Project:

3.13.1.1. Minimum budget of \$1,500 (admin can change this threshold by property)

3.13.1.2. Need a bid from three vendors before the manager can award the project to a vendor.

3.13.2. Work Order:

3.13.2.1. Manager creates a Workorder record associated to a property. Workorders have a max budget of \$1,500 (admin can change this threshold by property)

3.13.2.2. Manager reviews bids and awards the project to one vendor and at the moment the vendor is charged a win fee