User Stories

Project Module

1. Photo Image – Select image from the attachments and use it as the main image for the project
2. Bulk Upload Images – link multiple images to a project
3. Facebook linker – Project details will be posted to the companies Facebook account
4. Twitter linker – Project details will be tweeted to the companies Twitter account
5. Pinterest liker – Project details will be posted to the companies Pinterest account
6. Upload project stage – Relate new stage to a project. No duplication of stage.
7. Registration ticker – When this field updated, update the related registration information (started, stopped)

Photo Image Module

1. Bulk Upload Images – Can we mass import images in SugarCRM?

Title Module

1. Update title released – if title release is entered, update the related project’s title released, contract title released date. Option to send an email to those people who have contracts in this stage/building and Mail Merge.
2. Mail merge
3. Email button – when a title is released send an email to the people who are within the stage/building
4. Buildings/stages subpanel for the project – display subpanel for the buildings/stage of the related project
5. Document subpanel.
6. Date – When entered, send an email to all the people within the stage/building
7. Change labels for Titles Released/Certificate of Occupancy – if project is NSW, use Certificate of Occupancy

Pricing Module

1. Land Deposit% - If entered, this would apply to all properties uploaded. If property type is U/A, TH/V, do not display this field.
2. House Deposit% - if entered, this would apply to all properties uploaded. If property type is U/A, TH/V, do not display this field.
3. Exchange Deposit/Deposit % - if project state is NSW, this field is displayed as Exchange Deposit. If House Deposit or Land Deposit has been entered, Exchange Deposit amount can be entered (given that property type is U/A, TH/V, House and Land, and Settle Land first field is NO).
4. Days to Exchange – if project is not NSW this field is not displayed
5. Add to Marketing Price – if entered, add the value to the Marketing Price
6. Reservation on Hold Group
   1. Stage – if a project has many stages, we need to be able to enter in multiple stages and a hold (if there is) to that stage.
      1. This will be a sub-module under Pricing.
   2. Special Offer – This amount comes from the related promotion. If input under “For” as “Titled” then this would be on offer for say 3 days for the land which already has titles. If it is for untitled land, then this applies to the untitled land only. This can also be entered inclusive or exclusive of the GST
      1. When a promotion is created/removed the price for that promotion is added/subtracted to the special promo field.
7. Finance Clause Term – If a referrer will reserve a property, this field will popup. If input under “For” as “Titled” then this would be on offer for say 3 days for the land which already has titles, if it is for untitled land, then
8. Pricing Display Options
   1. Consider Creating a module for this
   2. Remove the create button for this module except for the subpanel
9. Options Subpanel – Relate features
10. Promotions Subpanel

Deposit Module

1. Deposit cannot be deleted by normal users
2. Deposit For (Deposit Types) – Dropdown options will depend on the property state.
   1. Deposit – All state (where property type is Unit/Apartment, Townhouse/Villa. House & Land where no house or land deposit is entered)
   2. Exchange- NSW contracts only
   3. Holding Deposit – NSW contracts
   4. Settlement (All state (where property type is Unit/Apartment, Townhouse/Villa. House & Land where no house or land deposit is entered)
   5. Other selection will be all state
3. Deposit to be Held By – Can we have default accounts?

Documents Module