# Phoenix Restorations Client Portal 1.0 Release Notes

## System Requirements

Client Portal requires at least 1 Linux server running Apache with MySQL.

An optimal setup would be 2 servers:

* 1 server for the client portal running Apache with MySQL
* 1 server for the RESTful API database running Apache with MySQL

Whichever server is used as the RESTful API database requires the installation of a Java Runtime Engine (JRE) and the installation of Server.jar. A typical location might be /var/www/servers/ folder. From there, the addition to the rc.local file so run the jar bootstrap script on server startup:

su – USER\_FOOBAR –c /path/to/webroot/java-server.sh

## Additions - BackOffice

### Staff

The staff component is for administering all staff.

This includes adding new staff, list all staff, edit profile, edit credentials, edit permissions/roles, and edit status (active/suspended/locked).

### Scoping

The scoping section is for administering all scope requests.

This includes creating a new scope request, listing all scope requests, and listing all takeoffs.

The user can click on a scope to:

* view its details
* add/edit a location (eg: an apartment number)
* add a contact to a scope location (eg: landlord or tenant contact information)
* create a material takeoff sheet
* view the material takeoff sheet

### Claims

The claims component is for administering all job claims.

This includes creating a new claim. One method is the multipage wizard, intended for a claim being entered on the phone. The other is the claim overview page where the complete claim details can be viewed in one layout.

Claims can have multiple units (eg: a building has a flood that affects 8 apartments and the lobby. Each of these units are part of the main claim, including the lobby public area).

Units can open a separate sub claim (eg: unit 205 in the 8 apartment flood has decided to use their own insurance and they decide to do tenant improvements (an upgrade) and the strata is not covering the upgrade).

Staff (technicians) can log their work performed on a unit (eg, Mike swept the floor for 1 hour, Jim removed the drywall for 2 hours).

Work history on a unit can be viewed on a unit.

Message history on a unit can be viewed.

### Companies

The companies component is for administering all companies (eg: insurance, property management, etc..)

This includes:

* adding/editing a new company
* listing all companies
* deleting a company
* viewing contacts assigned to a company
* adding a contact to a company
* viewing claims assigned to a company
* viewing claims assigned to a contact within a company

### Contacts

The contacts component is for administering all contacts (eg: tenants, landlords, insurance agents, etc...)

This includes:

* Adding/editing a new contact
* Listing all contacts
* Deleting a contact
* Editing the permissions of a contact
* Editing the credentials of a contact
* Editing the status of a contact
* Viewing the claims history of a contact

### Work Actions

The work actions component if for administering types of work performed on a job (eg: remove drywall, install drywall, paint the wall).

This includes:

* Adding/editing a new work action \*multi-language input form
* Listing all work actions
* Deleting a work action

### Website

The website section is comprised of 2 components for administering the front end public website.

#### CMS

The cms component is used for administering page content in the public website.

This includes:

* Listing all pages
* Add/edit a new page \*this is a multi-language input form
  + List all sections
  + Add a new section \*this is a multi-language input form
* Listing all sections
* Creating a new section \*this is a multi-language input form

#### Blogs

The blogs component is for administering the website blog posts.

This includes:

* Listing all blog posts
* Creating/editing a new blog \*this is a multi-language input form

### Building Addresses

The building addresses component is for administering locations for all claims. This is useful since as time goes by, a building may have multiple claims. This removes redundant input of addresses and typos in address information.

This includes:

* Add/edit an address
* List all addresses
* Assign an existing floor plan
* Upload a new floor plan

A building can have multiple floor plans (eg: corner units have floor plan A, central units have floor plan B, and units next to the elevator shaft have floor plan C since they need to accommodate for the consumption of space due to the elevator shaft). This allows the scope writer to select a floor plan on the fly while performing an estimate of damages.

### Surveys

The surveys component is for administering all questionnaires, input forms and scoping surveys. The structure of a survey is as follows:

* Surveys are comprised of pages (eg: a contact information page).
* Pages are comprised of panes (eg: a pane for personal information, a pane for mailing information). These panes can be sorted.
* Panes are comprised of questions (eg: firstname, lastname, email address) and associated answers.
* All questions, answers, panes and even fully created pages are re-usable across multiple surveys.

The survey component includes:

* List all questions
* Add/edit questions \*multi-language input form
  + Add/remove answers (for multi select questions such as radio, checkbox and selection boxes)
* List all answers
* Add/edit answer \*multi-language input form
* List panes
* Add/edit pane
  + Add/remove question
* Delete pane
* List pages
* Create/edit page \*multi-language input form
  + Add/remove pane
* List all surveys (including number of respondents)
* Create/edit survey \*multi-language input form

### Events

The events component is for administering all corporate events.

This includes:

* List all events
  + List attendees
  + List prospects
  + Edit invitation lists
* Create/edit event \*multi-language input form
  + Add/remove event type
* List all event locations
* Create/edit location
* List all event types
* Create/edit event type \*multi-language input form
* List all event contacts
* List all event prospects (people that register that are not in our system)
* List all invite lists

## Additions - Portal

### Profile

In this section logged in users can:

* View their contact information
* Update contact information
* Change password

### Notification Settings

In this section logged in users can change the notification options (mobile text, email...) for various events that can occur (eg: a claim changing status or phase).

### Project Status/Schedule

In this section logged in users can view all aspects of a project. **This is the dashboard/HUD**

This includes the following:

* Photos
* Documents
* Communications
* View affected locations
  + For a tenant its each room
  + For building managers it also includes a list of units and public areas
  + For property management firms it includes a list of buildings
* Generate reports
* List of phases (1-8 phases plus ECD)
* Story stream (eg: entered unit 601, phase changed on unit 602)
* View projects history - list of all previous and current projects the property management or insurance company has had with us
* List/create/view personal notes on a claim

### Alerts

This is a list of items requiring action (eg: we need unit access granted).  
Includes indications “3 new alerts”

### Notifications

This is informative only – no actions required

|  |
| --- |
| eg: golf tournament coming up |
| also: |
| changes to status |
| work performed |
| incident occurred |
| new documents uploaded |
| new photos uploaded |

### Messaging

* Contact form (eg: send to PMA)
* Email
* In-app email
  + Send message
  + Login to respond to message
* Sms message

### Action Requests

Input form for sending requests, including:

* Internal to internal (send a message to a colleague)
* Internal to external (eg: staff requesting unit access)
* External to internal (eg: please send me a document)

### Events

This is where logged in users can view a list of events and RSVP to them

### FAQ

This is where logged in users can view questions/answers that we have published inside the portal. This section will also contain downloadable documents/propaganda

### Add to Calendar

An event or appointment can be added to google calendar/office/iPhone calendar

### Contacts

This is where logged in users can view a list of their personal contacts. This can be an Insurance Agent adding their assistant – it would create an invite for the assistant with a 1 time use login, whereby the assistant can update their contact info and be granted access to the claims list. This is intended so that contacts do not have to be added by Phoenix Staff in the backoffice section – clients can manage their own lists without the need to call Phoenix.