

Jarvis

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List of Projects to be Approved

Project ID #	Date submitted	What	Where	When
1234	July 24, 2012	We want to revovate our kitchen from	Downtown Montreal	During the summer
1234	July 24, 2012	We want to revovate our kitchen from	Downtown Montreal	During the summer
1234	July 24, 2012	We want to revovate our kitchen from	Downtown Montreal	During the summer
1234	July 24, 2012	We want to revovate our kitchen from	Downtown Montreal	During the summer
1234	July 24, 2012	We want to revovate our kitchen from	Downtown Montreal	During the summer
1234	July 24, 2012	We want to revovate our kitchen from	Downtown Montreal	During the summer

This will be a list of all projects with the status "Received". The projects that were submitted through the site and are waiting to be approved or rejected.

The information in the columns are directly the input of the user in the respective boxes (what, where, when).

When we click on one line, the specific and detailed information about that project appears in the window on the right >>>

When a project is either approved or rejected, it should be removed from this list.

Project Details

Project ID # [Edit](#)

Date submitted

What 

Where

When

Client Name

Phone #

E-mail

Admin Notes 

Admin user can input notes (ex: I just left a voice mail to the client to ask more details)

Title (max 50 characters)

Category

Region

This is the box that required manual intervention from admin to create a title and assign a category and region from a drop-down list

Reject - Category

Reject - Region

Invalid

Approve

E-mails to be generated to user based on the action / button
Refer to email communication documentation for email templates

Status will be changed from "Received" to one of the 4 options depending on the button

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List of Projects to be Sold

Project #	Date submitted	Title	Category	Region
1234	July 24, 2012	Replace shingles roof 20x34	Roofing	Montreal
1234	July 24, 2012	Replace shingles roof 20x34	Roofing	Montreal
1234	July 24, 2012	Replace shingles roof 20x34	Roofing	Montreal
1234	July 24, 2012	Replace shingles roof 20x34	Roofing	Montreal
1234	July 24, 2012	Replace shingles roof 20x34	Roofing	Montreal
1234	July 24, 2012	Replace shingles roof 20x34	Roofing	Montreal

This will be a list of all projects with the status "Approved"
The information in the columns are the input from admin user in the "Approve Project" task
When we click on one line, the specific and detailed information about that project appears in the window on the right >>>
When a project is sold, it should be removed from this list

Project Details

Project ID # [I Edit](#)
 Date submitted
 Title
 Category
 Region
 What
 Where
 When
 Client Name
 Phone #
 E-mail
 Admin Notes

Sell Project

I Remove All	Company	Ranking	Notes	Status
<input checked="" type="checkbox"/>	ABC Renovation 555-555-5555 sales@abcreno.com	85 % 72 % 95 % 88 % 75 %	<input type="text"/>	
<input checked="" type="checkbox"/>	ABC Renovation 555-555-5555 sales@abcreno.com	85 % 72 % 95 % 88 % 75 %	<input type="text"/>	
<input checked="" type="checkbox"/>	ABC Renovation 555-555-5555 sales@abcreno.com	85 % 72 % 95 % 88 % 75 %	<input type="text"/>	

List of companies that are a match, based on Category + Region.
And that are not in DND (do not disturb) mode.
Companies presented in order of the overall ranking score (the best on top).
The last comes already with all boxes checked.

Order of ranking % : 1- Accept rate | 2- Close rate | 3- Client satisfaction | 4- Payment history | 5- Discretionary

E-mail with project info sent to pros.
(refer to email communication document)

When project is sold, or expired, status changed to "Sold" if at least one pros accepted, and to "Closed" if no pro accepted

Sell

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Project Details

Project ID # [I Edit](#)

Date submitted

Title

Category

Region

What [I Edit](#)

Where

When

Client Name

Phone #

E-mail

Admin Notes [I Edit](#)

Project Status

If the project is status "Follow-up", those buttons appear.
If the project is in any other status, the status is displayed here (just a big text with the name of the status in this blue box)

[I Edit](#) Pro \$ Not confirmed

Closed Awarded

List of pros

Awarded	Company	Status
<input type="checkbox"/>	ABC Renovation 555-555-5555 sales@abcreno.com	Re-send Project Info 
<input type="checkbox"/>	ABC Renovation 555-555-5555 sales@abcreno.com	Propose Project 
<input type="checkbox"/>	ABC Renovation 555-555-5555 sales@abcreno.com	Propose Project 
<input type="checkbox"/>	ABC Renovation 555-555-5555 sales@abcreno.com	Propose Project 

If pro has already "purchased" a project, then the button should be to re-send him the project info + client contact

If pro has rejected the project OR still not replied, then the button should be to "sell" him the project (sending just the project info, no client info)

Communication

All system logs, actions, emails, notes, etc [I Compose New](#)

Date	From	Message	
June 12, 2012	System	Received project	I View
June 13, 2012	System	Approved project	I View
June 13, 2012	System	Project sold	I View
June 24, 2012	User	Selected ABC Renovation	I View
June 27, 2012	User	Gave 7/10 rating to ABC Renovation	I View
June 27, 2012	Admin	Thanks you. Please call us to give more information about your specific case so we can try to help you.	I View
June 27, 2012	Admin	I will call you tomorrow	I View
June 27, 2012	Note	Reminder to call the client because he was not happy with the service	I View

Notes

Next Follow-up

Re-start follow-up on : [/ /](#) 

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Business Coordinates

Business ID # See list of Pro Status
 Status Active [Edit](#)

Company Name
 Address
 City
 Province, Postal Code Select

Language English French
 Member since / /

Contact Name
 Other Contact
 Main Phone
 Secondary Phone
 SMS
 Main E-mail
 Secondary E-mail
 Credit Card Select
 Number
 Expiration Select Select
 Credit Card not on file
 Invoice
 Commission % Admin \$ Lead

Ranking Statistics

See Ranking Calculation Method

Proposed	Accepted	Accepted too late	Rejected	Closed
100	60	10	30	6
85%	60%	10%	30%	10%
Client Satisfaction	Invoice History	Discretionary		
Edit	Edit	Edit		

Total invoiced \$ 12,555
 Collected \$ 10,555
 Receivable \$ 2,000
 Avg \$ per Project \$ 6,000

Overall Rating 92 %

Communication

All system logs, actions as well as emails [Compose New](#)

Date From Message

- June 12, 2012 System Please find attached the list of active projects for the month of May 2012. We ask to follow-up with us as soon as possible.... [View](#)
- June 24, 2012 System System : project follow-up list sent [View](#)
- June 12, 2012 Pro Thanks. We just closed project #1234 for \$10,000. You can invoice us next week, when the project will be completed. [View](#)
- June 24, 2012 Admin Talked with Mike on the phone. He will send us a check by Monday. [View](#)
- June 12, 2012 Pro Thanks. We just closed project #1234 for \$10,000. You can invoice us next week, when the project will be completed. [View](#)
- June 24, 2012 System System : project follow-up list sent [View](#)

Open a message box (read more, reply, etc.)

Categories

Calendar icon to be able to input "from" - "to" dates for seasonal categories

Landscaping :	Landscaping :	Landscaping :
<input type="checkbox"/> Deck	<input type="checkbox"/> Deck	<input type="checkbox"/> Deck
<input checked="" type="checkbox"/> Lawn	<input checked="" type="checkbox"/> Lawn	<input checked="" type="checkbox"/> Lawn
<input type="checkbox"/> Fence	<input type="checkbox"/> Fence	<input type="checkbox"/> Fence
<input checked="" type="checkbox"/> Driveway	<input checked="" type="checkbox"/> Driveway	<input checked="" type="checkbox"/> Driveway

| Roofing : |
|----------------------------------------------|----------------------------------------------|----------------------------------------------|----------------------------------------------|----------------------------------------------|
| <input checked="" type="checkbox"/> Flat |
| <input checked="" type="checkbox"/> Shingles |

Regions

Montreal :	Toronto :	Calgary :	Ottawa :	Quebec :
<input type="checkbox"/> Montreal	<input type="checkbox"/> Toronto	<input type="checkbox"/> Calgary	<input type="checkbox"/> Ottawa	<input checked="" type="checkbox"/> Quebec
<input checked="" type="checkbox"/> Laval	<input checked="" type="checkbox"/> Mississauga	<input type="checkbox"/> North York	<input type="checkbox"/> Gatineau	<input type="checkbox"/> Levis
<input type="checkbox"/> Monterege	<input type="checkbox"/> Markham	<input type="checkbox"/> Edmonton		
<input checked="" type="checkbox"/> Rive-Nord				

Notes

Clicking on a project line opens the Manage Project page

Project List

#	Date	Region	Category	Title	Status
1122	June 24, 2012	Montreal	Roofing	Renovate shingle roof	Sold
2233	June 12, 2012	Toronto	Landscaping	Excavate and install grass in backyard	Paid
1122	June 24, 2012	Montreal	Roofing	Renovate shingle roof	Sold
2233	June 12, 2012	Toronto	Landscaping	Excavate and install grass in backyard	Awarded
1122	June 24, 2012	Montreal	Roofing	Renovate shingle roof	Sold
2233	June 12, 2012	Toronto	Landscaping	Excavate and install grass in backyard	Awarded
1122	June 24, 2012	Montreal			Invoiced
2233	June 12, 2012	Toronto	Landscaping	Excavate and install grass in backyard	Paid

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search

Username | Log Out | Edit Profile

Refine Search

Search Results - List of Projects

Project #

Date All / to /

Status

<input checked="" type="checkbox"/> Received	<input checked="" type="checkbox"/> Sold
<input type="checkbox"/> Rejected (Reg)	<input type="checkbox"/> Follow-up
<input checked="" type="checkbox"/> Rejected (Cat)	<input checked="" type="checkbox"/> Closed
<input type="checkbox"/> Invalid	<input type="checkbox"/> Awarded
<input type="checkbox"/> Approved	<input type="checkbox"/> Invoiced
<input checked="" type="checkbox"/> Sale in process	<input checked="" type="checkbox"/> Paid

Region

- Quebec
- Montreal
 - Laval
 - North Shore
 - South Shore
- Calgary
 - Calgary
- Toronto

Category

- Painting
- Landscaping
 - Fence
 - Deck
 - Grass

Project #	Date Submitted	Title	Category ▼	Region ▼	Status ▼
1234	July 12, 2012	Build new wooden deck	Deck	Calgary	Awarded
1234	July 12, 2012	Build new wooden deck	Deck	Calgary	Approved
1234	July 12, 2012	Build new wooden deck	Deck	Calgary	Sold
1234	July 12, 2012	Build new wooden deck	Deck	Calgary	Paid

Clicking on a project line would open the "Manage Project" page for that specific project

Refine Search

Search Results - List of Pros

Pro ID #	<input type="text"/>
Status	<input checked="" type="checkbox"/> Active <input type="checkbox"/> New Submitted <input checked="" type="checkbox"/> On-Hold <input type="checkbox"/> Deactivated <input type="checkbox"/> Out-of-Region <input checked="" type="checkbox"/> Banned <input type="checkbox"/> Invalid
Region	<input checked="" type="checkbox"/> Quebec <input type="checkbox"/> Montreal <input type="checkbox"/> Laval <input type="checkbox"/> North Shore <input type="checkbox"/> South Shore <input type="checkbox"/> Calgary <input type="checkbox"/> Calgary <input checked="" type="checkbox"/> Toronto
Category	<input checked="" type="checkbox"/> Painting <input type="checkbox"/> Landscaping <input type="checkbox"/> Fence <input type="checkbox"/> Deck <input type="checkbox"/> Grass

Pro ID #	Company	Ranking ▼	Status ▼
655	ABC Renovation (John Smith)	555-555-5555 sales@abcreno.com 92 %	85 % - 72 % - 95 % - 88 % - 75 % Active
655	ABC Renovation (John Smith)	555-555-5555 sales@abcreno.com 92 %	85 % - 72 % - 95 % - 88 % - 75 % On-hold
655	ABC Renovation (John Smith)	555-555-5555 sales@abcreno.com 92 %	85 % - 72 % - 95 % - 88 % - 75 % Banned

Clicking on a pro line would open the "pro Profile" page for that specific pro

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search

Username | Log Out | Edit Profile

Tools

- + Add New Project
- + Add New Pro
- Regions
- Categories
- Testimonials
- Rankings (Pros)
- Status
- Email templates

This would be the basic page when clicking on the "Setting Tools" section.
Then follows a different settings window for each button (see separate wireframes)

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search

[Username](#) | [Log Out](#) | [Edit Profile](#)

Tools

[+ Add New Project](#)[+ Add New Pro](#)[Regions](#)[Categories](#)[Testimonials](#)[Rankings \(Pros\)](#)[Status](#)[Email templates](#)

Opens a "blank" Approve Project page

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search

[Username](#) | [Log Out](#) | [Edit Profile](#)

Tools

[+ Add New Project](#)[+ Add New Pro](#)[Regions](#)[Categories](#)[Testimonials](#)[Rankings \(Pros\)](#)[Status](#)[Email templates](#)

Opens a "blank" Pro Profile page

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Tools

+ Add New Project
+ Add New Pro
Regions
Categories
Testimonials
Rankings (Pros)
Status
Email templates

Settings : Regions

Territories Add

Toronto
Montreal
Toronto
Calgary

Regions Add

Laval
South-Shore
North-Shore
Down I

When clicking on "+Add" a free text box will be added to insert the new text

Enable on Home Page
Order

Region ID # Territory Region

English French

Location Tag (i.e. in Montreal)

Keywords

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Tools

- + Add New Project
- + Add New Pro
- Regions
- Categories**
- Testimonials
- Rankings (Pros)
- Status
- Email templates

Settings : Categories

Group

Add

Picture

Enable on Home Page

Order

Category ID # Group Category

English	French
<input type="text"/>	<input type="text"/>

Category Name
Main Tag Line on Landing Page
Title on Submit Form
Page Title
Keywords
Page Description
Category Info Text - Title
Category Info Text - Article

Categories

Add

Fence
Deck
Lawn
Drivew I

When clicking on "+Add" a free text box will be added to insert the new text

Tools

[+ Add New Project](#)[+ Add New Pro](#)

Regions

Categories

Testimonials

Rankings (Pros)

Status

Email templates

Settings : Testimonials

Users :

	Add	Select	English	French	City	Name
	<input checked="" type="checkbox"/>	Upload				
	<input checked="" type="checkbox"/>	Upload				
	<input checked="" type="checkbox"/>	Upload				

Pros :

	Add	Select	English	French	City	Name
	<input checked="" type="checkbox"/>	Upload				
	<input checked="" type="checkbox"/>	Upload				
	<input checked="" type="checkbox"/>	Upload				

Tools

[+ Add New Project](#)[+ Add New Pro](#)[Regions](#)[Categories](#)[Testimonials](#)[Rankings \(Pros\)](#)[Status](#)[Email templates](#)

Settings : Ranking (Pros)

Item	Calculation	Weight	 Add
Accepted Projects	Accepted ▾ / Proposed ▾	20 %	 Remove
Closing Rate	Closed ▾ / Accepted ▾	20 %	 Remove
Client Satisfaction	8,7 / 10	20 %	 Remove
Payment History		20 %	 Remove
Discretionary	85 / 100	20 %	 Remove

Tools

[+ Add New Project](#)[+ Add New Pro](#)[Regions](#)[Categories](#)[Testimonials](#)[Rankings \(Pros\)](#)[Status](#)[Email templates](#)

Settings : Status

Project Status List

- | | |
|--------------------|------------------------|
| 1- Received | Edit |
| 2- Rejected (Reg) | Edit |
| 3- Rejected (Cat) | Edit |
| 4- Invalid | Edit |
| 5- Approved | Edit |
| 6- Sole in process | Edit |
| 7- Sold | Edit |
| 8- Follow-up | Edit |
| 9- Closed | Edit |
| 10- Awarded | Edit |
| 11- Invoiced | Edit |
| 12- Paid | Edit |

[!\[\]\(ae9ba1fb84fedddf9e0c13562fe7d84c_img.jpg\) Add](#)

Pro Status List

- | | |
|------------------|------------------------|
| 1- Active | Edit |
| 2- New Submitted | Edit |
| 3- On-Hold | Edit |
| 4- Deactivated | Edit |
| 5- Out-of-Region | Edit |
| 6- Banned | Edit |
| 7- Invalid | Edit |

[!\[\]\(55565783cc6bed40097b4839bf03f6a2_img.jpg\) Add](#)

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Tools

[+ Add New Project](#)[+ Add New Pro](#)[Regions](#)[Categories](#)[Testimonials](#)[Rankings \(Pros\)](#)[Status](#)[Email templates](#)

Settings : Email templates

Trigger

English

French

[Add](#)Send when project
status changes to : [Remove](#)Send when project
status changes to : [Remove](#)Send when project
status changes to : [Remove](#)

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To come at a later stage.

This page would be a dashboard with relevant information, stats and KPI that we want to see everyday, and that we will project on the office screen in real time.

We could have graphs and stats with :

- Number of projects today (and last 30 days, and vs. previous 30 days)
- Breakdown of number of projects by region
- Breakdown of number of projects by category
- Cost per acquisition (CPA)
- Conversion rate
- # of projects awarded to our pros
- Revenues (today, current month, etc.)
- Etc...

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To come at a later stage.

This page would allow us to generate various reports.