



SEPTEMBER 29, 2020

SEVILLE DEVELOPMENTS
TRACKER PORTAL

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DOKKIT LTD.



SCOPE – CUSTOMER PORTAL

Scope includes:

- User Interface
- Webapp controls
- Integration flow from simPRO to the customer portal

Important Information

- ☐ Any items not explicitly detailed in this document shall be deemed to be excluded.
- ☐ Works outlined in this scope will not start until a signed approval has been received.
- ☐ Images contained within the scope of works are for reference purposes only and may differ visually (but not functionally) from works delivered.
- ☐ We reserve the right to request a non-refundable deposit upon approval.
- ☐ Additional changes after quote approval will require re-scoping and re-quoting.

Business Requirements

As a customer of simPRO Seville Developments can give access to the customer portal but due to the nature of their business they need a more customised version for their housing authority client SW9.

The main requirements are:

- Multi-user logins
- Display current statistics for jobs that are open for SW9
- Allow jobs to be queried by either work order number, site Id or site address
- Show the following details for each job:
 - Work Order number
 - simPRO job number
 - SW9 Site identifier
 - Work order priority
 - Work order status
 - Work order description
 - Engineer assigned
 - Engineer cis card image
 - Scheduled work date
 - Scheduled work time
 - Engineer notes
 - Catalog entries with quantities
 - Attachments (both documents and images)
- Allow the user to update their app profile and password
- The webapp should be responsive on desktop and tablet
- API authentication to simPRO using Client Credentials Grant

WIREFRAMES

Login

A Web Page

https://sevilletrackerapp.co.uk

Login

User email

Password*

Submit

seville

Figure 1 Login

Dashboard

seville

Dashboard

Admin Panel

Work Order

Site

Work Order	SiteId	Site	Date Ope	Status	Engineer	Schedule Date	Schedule Time
20345	BLACKTH004	4 Blackthorn Close Launceston Cornwall	Jul-03-2019	In Progress	Jeff Waize	2021-08-05	8:00 - 9:30
20345	BLACKTH004	4 Blackthorn Close Launceston Cornwall	Jul-04-2019	Job Created	Jeff Waize	2021-08-05	14:00 - 15:00
20345	BLACKTH004	4 Blackthorn Close Launceston Cornwall	Jul-03-2019	New			
20345	BLACKTH004	4 Blackthorn Close Launceston Cornwall	Jul-03-2019	Completed	Jeff Waize	2021-08-05	8:00 - 9:00

<< < 1 2 3 4 >

Figure 2 Dashboard

1. Work order search – searches for the exact work order in simPRO
2. Site search – searches for all jobs for a particular site
3. Work order table – updated every few minutes and on page refresh
4. Table controls – will allow work orders to be viewed all at once or in segments and the table can be ordered by any column

Work Order Detail

seville

Dashboard

Admin Panel

<< Back to dashboard

Work Order #SD43204

simPRO Job #2134

Appointment Date

Time Slot

SiteID
BLACKTH004

Priority
Urgent 25 hour

Site
124 Harrow Court

Status
In progress

Description
Internal hall light fixture electrics

Engineer
Adam Lacey

CSCS Card
cscs.jpg

Engineer Notes

Catalog

1	Altroprime 90 5kg
1	Carefree TOP COAT SATIN 5 Litre (2 x 5 Litre Bottles)
1	Carefree Undercoat 5 Litre (2 x 5 Litre Bottles)
3	EpoSeal DPM 25kg
1	MIS MISTRAL EVAPORATIVE COOLER WITH REMOTE (MEC1R
2	PolySeal CS 5kg STEEL
2	weberfloor 4360 baseflow rapid 25kg bag
3	weberfloor 4610 industry top 25kg bag
1	

Attachments

Schematic.pdf
Safe Work Method Statement.pdf
purge_cert.pdf
IMG_2020_08_12.jpg
Operation Certificated Completed.pdf
FA design.pdf
Rams.pdf
Warranty-Certificate-Template.pdf

Figure 3 Work Order Detail

1. Work Order # - pulled from a custom field on the job
2. simPRO Job # - pulled from the job handler
3. Site ID – pulled from a custom field on the site
4. Priority – determined from job ResponseTime
5. Site – determined from job and site data name
6. Status – pulled from the job status
7. Description – pulled from the job and html formatting enabled
8. Engineer – pulled from the job schedule
9. CSCS card – pulled from the engineer data if available
10. Catalog – combination of all stock parts assigned to the job along with quantities and attachments

3

Catalog Detail

seville

Dashboard

Admin Panel

<< Back to dashboard

Work Order #SD43204

Appointment Date

SiteID

Site

Description

Engineer

Engineer Notes

Catalog

1	Altroprime 90 5kg
1	Carefree TOP COAT SATIN 5 Litre (2 x 5 Litre Bottles)
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Operation Certificated Completed.pdf
FA design.pdf
Rams.pdf
Warranty-Certificate-Template.pdf

Catalog part

Altroprime 90 5kg

Part No

HSFRA093

Vendor

HSFRA

Vendor Description

Attachments

[manufacturer_datasheet.pdf](#)

Figure 4 Catalog Detail

1. Catalog Part - pulled from the job cost centre
2. Part no – pulled from the catalog table
3. Vendor – pulled from the catalog table
4. Vendor Description – pulled from the catalog table
5. Attachments – list of all available attachments for the catalog part

User Profile

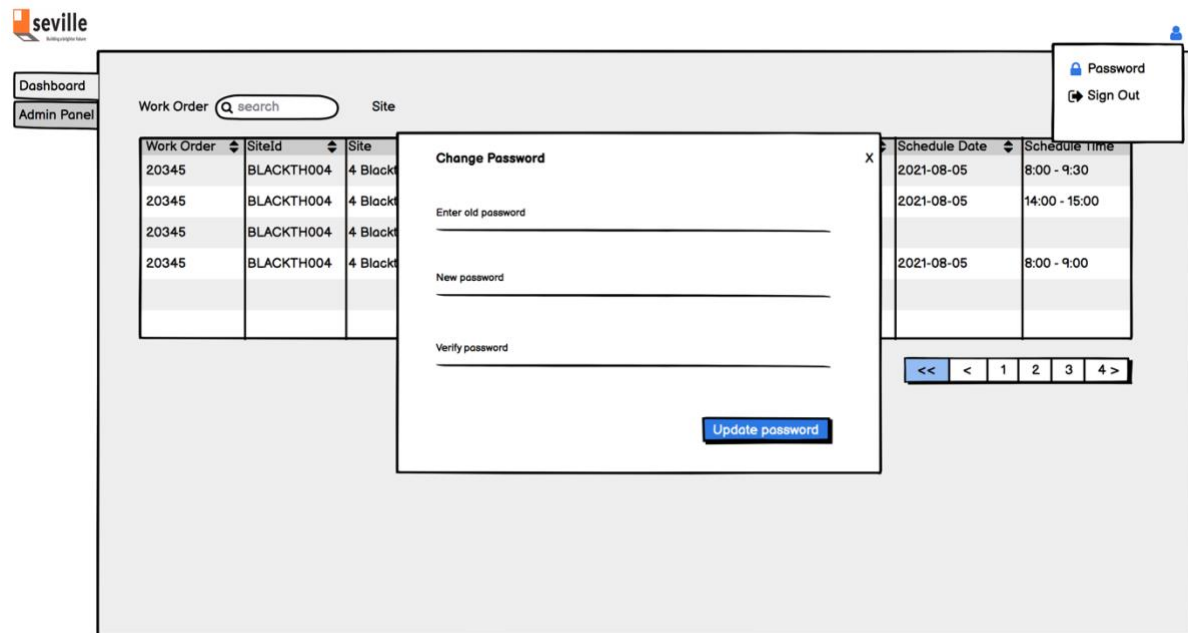


Figure 5 User Profile

1. User Details – pulled from the simPRO site name
2. Password – here the user can change their password for the portal

Admin Panel

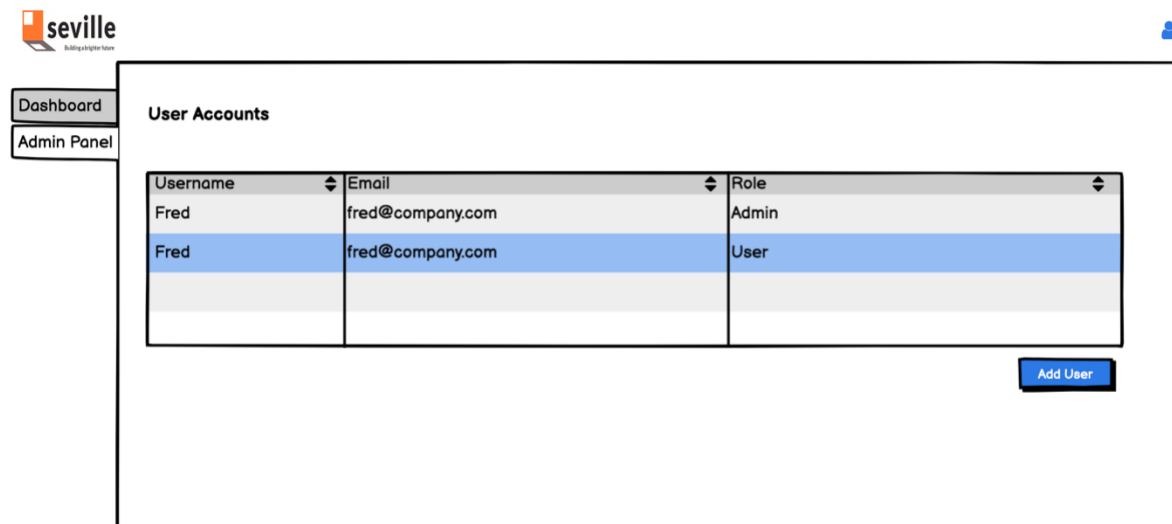


Figure 6 Admin Panel

1. Admin Panel only visible to admin users
2. Only two roles; Admin and General User

The screenshot shows the 'User Accounts' management interface. On the left, there is a sidebar with 'Dashboard' and 'Admin Panel' options. The main area displays a table of users:

Username	Email	Role
Fred	fred@company.com	Admin
Fred	fred@company.com	User

On the right, there is a form for editing user details for the selected user (Fred):

Username: Fred
 Email: Fred@company.com
 Role: User

Buttons: Delete User, Update User

Figure 7 Edit/Add User Details

SITEMAP

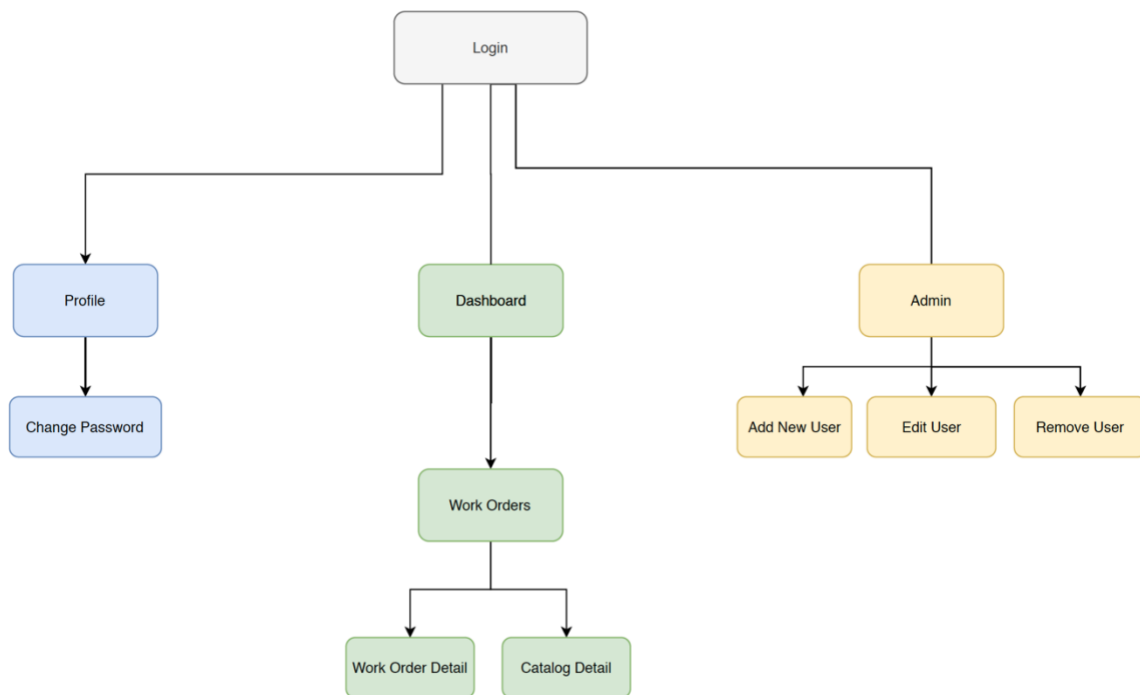


Figure 8 Site Map