Description

The main goal is to achieve an easy to use, portable, system for car dealers and customers to handle all documents that are needed for financing or leasing a car. The customer can upload files to the platform and see the current status of the progress.
The dealer is able to download all documents and change the status of the progress from his backend. The dealer is also able to add comments to upload sections – i.e. 'document blurry', etc.

Functions per user groups

Main Admin (owner) / 'God Mode'

Is able to…

…view, delete and 'pause' client's accounts
…edit client's subscription plan
…create, edit and delete subscription plans
…add / edit or delete legal information of each client
…create user accounts for all salespersons with details that will be shown in the front end
…assign salesperson to customer
…customize logo of each client
...delete salesperson's account
…view all documents and customers details
…see log files of taken actions
…customize logo of each client
…create custom translations of every text value
…move uploaded files to different categories

Admin (client):

Is able to…

…subscribe to a subscription plan in order to use the system
…customize own logo
…add / edit or delete own legal information
…create user accounts for own salespersons with details that will be shown in the front end
…assign salesperson of his company to customer
…create a customer's account. The password will be set by the system
…delete uploaded documents
…send message to customer using a contact form
…delete customers data with a 24 hour schedule
…mark document set complete
…move uploaded files to different categories

Salesman:

Is able to…

…create a user account. The password will be set by the system and credentials will be emailed to the customer
…comment document folders
…delete uploaded documents
…send message to customer using a contact form
…upload documents that need to be signed
…mark document set complete
…move uploaded files to different categories

Customer:

Is able to…

...upload files
…view and print files
…change password
…ask to delete all data

General

If documents are uploaded by the customer an email should inform the assigned salesperson that documents have been uploaded.

If documents are uploaded by a salesperson an email should inform the customer that documents have been uploaded

A log entry should be created so every action can be tracked

Actions that need to be logged with timestamp:
* All events where documents have been opened
* All events where documents have been printed
* All events where documents have been uploaded
* All events where documents have been deleted
* All events where assignments happened
* All events where the contact form has been used
* All events where a customer asks for deletion of the data
* All events where a customer changes its own data

If customer asks for deletion of all data, a confirmation email needs to be sent to his email address with a link that verifies the deletion of all data. The deletion may delay for 24 hours. After deletion a confirmation email will be sent to the customer. All data need to be deleted from the system including the log in credentials. Also the email may hold a link that is the option to stop the scheduled deletion. A re-registration of the same email address must be possible again.
The assigned salesperson also receives an email where he only gets informed that the customer asks to delete its data.

Away mode: if a salesperson is away it should be possible to assign a representation for a defined time

FRONT END
SKETCH
Customer VIEW
„OVERVIEW‘

[CLIENT'S LOGO]

Menu

Welcome to the document portal of [CLIENT'S CHOSEN NAME]

[Desired car]
i.e. Volkswagen Golf

Current status:

Documents missing

Documents complete

In progress

Approved

Action required – please contact your salesperson

Status depending on selection in backend

Contact

On click on button this shall „unfold“
Button may bounce left to right

Your pseronal Contact

[Name of salesperson]
[Address]
Tel. +00 01234 56789
E-Mail: xxx@xxx.com

Download business card

Write message

On Click, menu „unfolds“:

Menu

Overview

My data

Documents

Contact

© Text

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My data

Menu

Company Name | Company Name

First Name | First Name *

Last Name | Last Name *

Email Address | Email address*

Current password

New password

Repeat new password

Change password

Current password | Current password to save changes

Save changes

Request deletion

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Documents

Documents that need to be reviewed and / or signed

Signed documents

ID card / Registration certificates or other

Wage statement, other income or business information

Business registration or Commercial register excerpt

Indicator that shows the customer what status the documents have.
The salesperson sets this in the backend:
i.e. yellow – action required
green – all information complete

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- Other category 1
- Other category 2
- Other category 3
- other category 4

CATEGORY SELECTED

I.e. Signed documents

Customer's point of view

Comment by salesperson / admin

filename.abc

Uploaded on [DATE]

filename.abc

Uploaded on [DATE]

filename.abc

Uploaded on [DATE]

..etc

On cklick on preview or file name or 'view icon' the file should open in a new window or lightbox

Salesperson point of view

Comment by salesperson / admin

Save comment

filename.abc

Uploaded on [DATE]

X

filename.abc

Uploaded on [DATE]

X

filename.abc

Uploaded on [DATE]

X

..etc

Delete | View | download | move to different category

Create user interface
salesperson / admin

[logo]

Create new user (sales person or admin or owner)

First Name *

Last Name *

Email Address *

Create User

Leads to email:

'Dear [First Name] [Last Name].

I created a new account for you in our document database. You can now log in by using your email address and the password [password]

Please follow this link to start uploading all documents needed: https://www.adress.com

If you have any questions, feel free to contact me

Best regards

[sales person]

[company name]

[Address]

[phone]

[Email] '

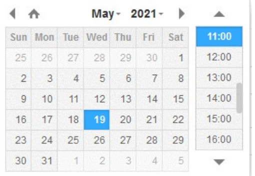
Salesperson

Set Representative

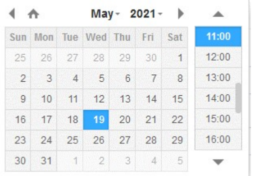
Dropdown

Holds all salespersons created by the admin

From: Field



To: Field



Name	Date created	Last activity	Car model	Action
John Doe	01.05.2021	02.05.2021	Golf	[view] [edit]
Carla Apple	30.04.2021	30.04.2021	Jetta	[view] [edit]