eresol inc

smart connections

Smart Connections

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# Customer Registration Page

1. Mobile Authentication is required for Customers & Email authentication required for Service Providers
2. User Name should be unique Email Address
3. All are mandatory fields
4. Password should be minimum 8 char with 1 number and 1 special char validation
5. Provide an option to view T&C document to review before sign in
6. Password should be masked in all forms

## **Customer Profile**

1. Changing Mobile Number needs re authentication
2. All Address information is optional except Country and Postal Code
3. Display only Fields (Customer First Name, Last Name, User Name and current mobile Number)
4. Capture Security questions and answers and prompt before changing the password
5. Areas of Interest is optional field

# Employee

1. Effective From Date and Effective to Date should be date pickers
2. Effective From Date should be default system date on creation of employee or can be changed to previous date
3. If Effective from Date is in future, system should not give access for anything till that date and we cannot create any schedules to this employee
4. All of them are mandatory fields in this form.
5. If render service is selected, system should consider this employee in schedules (all options)
6. Based on Role, System should give access to employee
7. Working Hours and Break time should captured in Time, so we can derive available timings for defining schedules for service providers.
8. Data values in Role can be derived from Look up
9. Service Provider / Corporate is display only
10. Whenever employee logs in first time, system should prompt to change the password
11. If an employee set as a Super User, he / she should be getting full access under that SP.

# Service Provider Registration Page

1. Email Authentication Required for Service Provider
2. \*\*\*All Service providers’ registration will be sent to Corporate for Approval.
3. Company Name is optional to entertain free lancers

## Service Provider Profile

1. Business Area should be driven from a look up
2. All are mandatory fields for Service Provider
3. New Email Address required re authentication
4. Appointment option determines what should be captured
5. If Appointment option is Default Schedules, system should give requirement box (details) for Service provider to capture it from Customer.
6. Customer should be entering details against requirements (1 and optional 2)
7. Upload service providers Business pictures and videos - This captures about service providers' photos, promos and videos and display to Customers.
8. Promos should be displayed separately than profile pictures and videos in service providers page

## Requirements Page

1. Service Providers Name should be display only
2. Add another requirement (+ Button)
3. If requirement 2 and requirement 3 are mandatory, service provider will check the box
4. Display image, if it’s captured in SP Profile page,
5. All these requirements should be shown to customer after choosing Service Provider for any service for both Option1 & Option2.
6. In case of Option 1(Regular Appointments), these requirements should be captured based on Appointment Specific, i.e., these requirements should be captured at Appointment Definition screen
7. In case of Option 2(Default Appointments), these requirements are captured after selecting service provider before finalizing time schedule

# Role & Responsibility Assignment

1. Should able to query an employee under Corporate or Service Provider (optional)
2. Roles should be pulled from Look up table
3. All forms defined in the system should be pulled here to grant access permissions
4. System should act based on access permission of any SP employee or Corporate Employee
5. Role Name may be Manager, Admin, Analyst and others. These to be appeared as roles in Employee creation
6. Functionality name is screen name / page name
7. Role are defined by a service provider and is applicable / used only by that service provider. Roles defined by one service provider is not visible for other service providers

# Lookup Page

1. Corporate / SP Name is display only based on login
2. Look up types are maintained in Database level (ex: Business Area, Appointment Category, Appointment Sub Category, Appointment Type, Roles, Appointment Options and others)
3. Pull Look up types based on Service Provider / Corporate login. Service Provider cannot have access to all lookup types.
4. Some of the lookups have parent / master and child relationship, which is also be defined at database level
5. Pull here base on selection
6. And data selection in respective forms should be dynamic based on master /child look up relation
7. All enabled (Y) and valid (considering effective from & effective to) should be shown in respective list
8. There is no restriction on look up values for any selected lookup category.  (But we will start with max of 100 values for any lookup)
9. Look up Values defined by any SP should be visible only to them.

# Appointment Definition Page

1. Based on Employee Definition, automatically no. of employees should be populated
2. Employee multi selection box should list all employees , who are rendering services
3. While defining appointment in the system, service provider will choose, who all participating in this appointment.
4. Effective Start Date & Effective End date should be Date fields
5. Appointment Start and end time should be defined using appropriate field types
6. Appointment scheduler should give access for SP to select day/dates/ time range for this appointment.
7. These schedules should be shown to customers accordingly
8. Knowledge base / links can be visible to customer, while taking this appointment
9. Upon submitting system should capture requirements for every individual appointment definition.
10. All requirements defined in the appointment should be shown to customers and capture answers accordingly while customer is taking the appointment.
11. If SPOT/Q checked as "Yes", system should able to give this appointment definition to walk in SPOT/Q on that specific days.
12. SPOT/Q should be having a separate Sequence number generated
13. APP ID (display only): System should generate a unique id (varchar field type) for every appointment definition prefixing SP ID (ex: SP ID + APP ID). This appointment Id should be captured in appointment scheduling page and customers' mobile app.
14. Appointment query , Appointment definition change and copy functionality should be provided in this same screen
15. If any changes to an appointment should be notified to customers accordingly on mobile App

# Scheduling an Appointment

1. Customer Details area is accessible only to SP, if customer calls and would like to schedule an appointment.
2. If Customer has already registered mobile with this account, system links to that account and customer can check appointment details on mobile app.
3. Customer does not have ability to review details, if he/she is not a registered member to our product.
4. Appointment Details are display only for Customer and SP
5. All available schedules should be shown based on appointment criteria
6. Before customer enter into this screen, system should prompt customer to select service provider and appointment selection page.
7. If service provider is entering into this screen, system should automatically populate SP Details.
8. System should call requirement section upon submit and capture answers for each appointment.
9. Reference number is across Appointments - means it should be unique for all appointments under one SP
10. SPOT / Q is only accessible to SP for walk in appointments.
11. In case of Default schedules, system should insert a record for a selected time in the table with "Tentative" status and send a notification on SP mobile app.
12. SP has an option to Accept / Reject the schedule
13. If SP updates the schedule, it should automatically update database as "Confirmed" / "Rejected" and update customer on mobile app
14. If SP does not respond in 24 hours, system should notify customer with SP Contact details to contact SP directly.
15. For Contact type schedule, after customer entering requirement details along with Appointment selection, system should show contact details of the SP. ( No schedule required)
16. Write a Review about Service Provider and Email link should be available for customers to interact (emailing) to SP
17. Review / Feedback should be accessible to all customers, who visit this SP
18. Emailing functionality should be available for both Customer / SP for 2 way communication.

# Data Load

1. File should be .csv file
2. Parse the data and upload to respective table
3. Tables should have all respective columns along with (TRX PROCESSED STATUS, SP NAME, and SP ID)
4. need to brainstorm on data security and storing
5. Data should be email to customers automatically in a PDF copy (\*\* discuss on options for templates)
6. Will brainstorm on options of mail merging options
7. System automatically loads to respective table based on selection, otherwise error message on mismatching selection
8. Emailing / SMS status should be updated if possible

# Search SP

1. If Business area is selected in menu, system should auto populate in this page
2. After selecting ZIP CODE system should pull details in Google map or scrolling list

# Search Appointment

1. This search is for both SP and customer
2. If SP login, system automatically populate SP Details (visible only)
3. If Customer Logsin, system automatically populate Customer Details
4. After submitting system should pull all the details in the grid
5. If any active appointment, customer or SP want to review in detail, system should open up details in App Schedule page upon double click the appointment from grid.
6. By default system should populate one week date range and Active Status

# Appointment Selection Page

1. System should all appointment listings from lookups appropriately
2. Upon clicking submit, system should take customer or SP to Requirements page based on definition
3. After Requirement gathering, system should take into scheduling page to select date and time

# Schedules

1. Employee Name is display only, assuming this employee login and trying to check his / her schedules
2. System should give option to select date in the calendar
3. All schedules should be visible upon selecting date / month respectively
4. After highlighting specific schedule, it should give details about customer and requirement answers for that
5. Customer information (Name, Mobile Number) and Requirements should be captured in every schedule for all schedule types.

# Closing

1. System auto populates Appointment ref number, but in case of walk-in user will enter SPOT/Q ref number and close it
2. Warning on wrong data entry, if prior appointments are still open allotted to this consultant or service associate.
3. Customer details (with email address from profile) should populate based on ref number
4. If customer details are not populate, user will enter customer details manually
5. Store these details with closing comments in a data base table for future tracking
6. Email these details to customers email address.
7. Ref number is always unique for SP appointment / SPOT (Q). System should able to pull closing details later date also based on Ref Number.