Residents Admin Panel

City Admin Panel:

1. <u>Surveys:</u>

This Section will be the survey feature.

Create Survey:
In the Survey section, admins can create surveys using the "create survey" button at the top right. After pressing it, a pop-up will show up asking to:

- Name the Survey (Survey Title)
- Select Folder (Select the folder which the survey will be assigned to) as a drop down list
- They can choose to create a new folder by clicking "Create new folder" at the bottom left of the pop up.

By pressing "next" we are taken to the external survey tool directly.

Delete Survey:
When the user presses the delete icon for a survey, a pop-up shows up saying:
"Are you sure you want to delete this Survey? You will lose all responses and data collected by this survey once deleted with no chance of recollection.
<u>* You can archive this survey instead</u>

Cancel **Archive** **Delete**

Archived Surveys
Will appear in the all surveys folder. Once you enter the folder, there will be two tabs the all surveys (1) and the archived surveys (2).

You can also archive by dropping down the three horizontal dots which when pressed show the "pick/change folder" option and the "archive option"

Folders *PENDING*
Folders can be picked by pressing the three vertical dots which will show the folder editing as an option.

Survey Icons and Functions:

The Pen: Edit Survey which will be external
The Eye: View Survey
The Human : see which members view the survey
The Graph: Survey results so far
Trash can: Delete icon
The On-Off toggle: Controls whether the survey is live or offline/done
The Broadcast option: Sends the survey as a broadcast to the members
PENDING

Bulk Options:
The user can get to multi select and bulk share, move folder or delete surveys by pressing the select on top of all surveys.

The broadcast survey option:
When you press the "broadcast" button, the following pop up will show up:

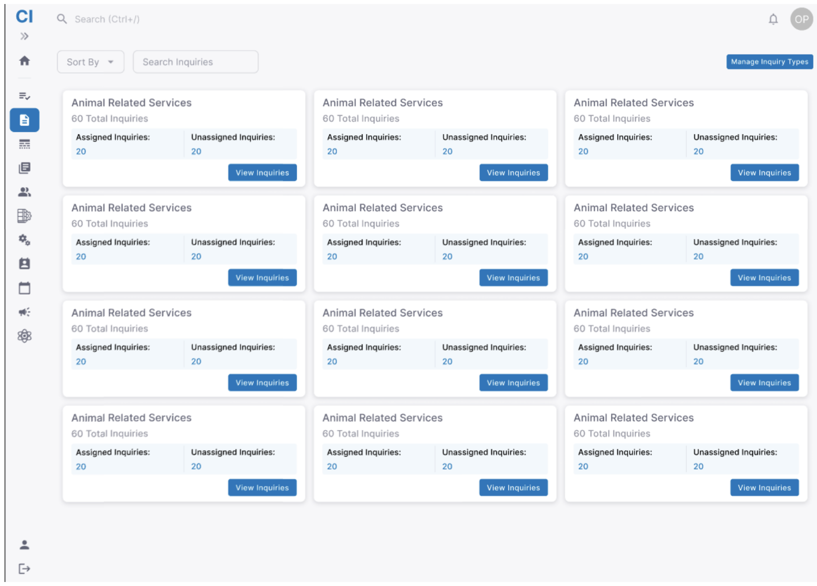
The user will get the survey on email, and or SMS. The process is the same as the broadcast process below.

The toggle on-off means if its available or not. If the toggle is on it means its available on mobile if not then its not.

2. Inquiries:

This section will focus on the inquiries.

Inquiries will be shown in square boxes where you can search the inquiries types or sort them.



Each box will be dedicated to an inquiry type and will show a number of assigned inquiries and unassigned inquiries.

<u>VIEW INQUIRIES</u>

When you press "view inquiries" the new page with all inquiries listed will appear. All Inquiries are listed by:
Name if the addresser - Inquiry Sub type - Date the Inquiry was issued - addresser phone number - addresser zipcode - who the inquiry is assigned to.

- Note: The inquiry can be preassigned to a staff member (will show staff name) or not assigned yet (will show N/A)

Delete Inquiry:
By pressing the delete icon a pop-up shows up asking to ensure whether we're sure we want to delete the inquiry.

The page will have subsections "new inquiries" and "closed inquiries".

4.1. New Inquiries:

This section shows all the new assigned and unassigned inquiries that have yet to be addressed and closed.

View Inquiry:
If we press view inquiry a pop-up will appear showing summary of the inquiry:

- Service Type

- Location: Full address - Resident addressers info
- Information: Comment about the inquiry + Photo attachement

Assign Inquiry:
In the view more, there are two buttons at the end of the pop up that say "Assign to" and "respond".
If the admin presses "assign to" another smaller pop up appears with a searchable drop down list of staff members to assign to.

Re-assign Inquiry:
In the view more, if the inquiry is already assigned to someone, there are two buttons at the end of the pop up that say "Re-assign to" and "respond".
If the admin presses "reassign to" another smaller pop up appears with "assigned to: Staff member name" written and a searchable drop down list of staff members to reassign to.

Respond Inquiry:
In the view more, there are two buttons at the end of the pop up that say "Assign to" and "respond".
If we press "respond to inquiry" a new pop up will appear with a general fill in text to enter response and submit.

Filters:
The inquiries page will be very packed, hence we have the filters. Once you press the "filters" at the top right corner of the page, a sidebar of filters will appear on the right side of the page as well. Inquiries will be filtered according to:

- Search specific inquiries
- Sort By
- Filter by Sub-type (drop down list of the subtype)
- Date range Here we'll have the tool be like the price range on amazon and ali express where you pick date range of inquiries issues (inquires between june 1st and 4rth for example)
- Status: Opened - Unopened
- Assigned to: Assigned - Unassigned

4.2. Closed Inquiries:

This section shows all the closed assigned inquiries that have yet to been addressed and responded to.

View Inquiry:

If we press view inquiry a pop-up will appear showing summary of the inquiry:

- Service Type
- Location: Full address - Resident addressers info
- Information: Comment about the inquiry + Photo attachment
- There is no action buttons only "back"
- Deleting it will be the same as before with an "are you sure" pop-up

Filters:

The inquiries page will be very packed, hence we have the filters. Once you press the "filters" at the top right corner of the page, a sidebar of filters will appear on the right side of the page as well. Inquiries will be filtered according to:

- Search specific inquiries
- Sort By
- Filter by Sub-type (drop down list of the subtype)
- Date range Here we'll have the tool be like the price range on amazon and ali express where you pick date range of inquiries issues (inquires between june 1st and 4rth for example)

MANAGE INQUIRY TYPES:

If we press the "manage inquiry type" button at the top right side of the main inquiry page, we manage inquiries meaning the following.

When pressed we get a pop up showing "General Inquiry Type" here you select the general inquiry types (in an on-off toggle features) you want active that will show for city residents when they want to create inquiry. If the admin presses they only want Animal related inquiries, private property inquiries, and problems and repairs inquiries only, then the other types of inquiries such as public right of way will not show up for the residents when submitting inquiries. Here therefore, the admin and city controls what they want the resident to see.

Under each inquiry type description there is two buttons "Manage inquiry types" and Staff Settings":

Staff Settings:

Pressing staff settings will show a small pop up with the ability to control staff. There will be:

- Drop down list of staff to add
- Assigned staff (search staff name)
- A list of all staff names with delete trash can icon next to them.
- If you delete assigned staff a pop up asking if you're sure you want to delete also shows up

Create Inquiry Type
On the top right corner of the manage inquiry types there is a "create inquiry type". This button allows the city admin to create a new inquiry type that was not already present in the oreset inquiries types.

When pressed, a pop up will appear with the following fill in information:
- Inquiry Title
- Inquiry Description
- Add sub-type
- Staff Setting: Add new staff - assign staff like before

3. Newsletter:

This section will show the newsletter the city will share with the residents

The news will be presented in squares with the news title and a headline picture.

Create News
On the top right corner if we press "create news" a pop up with the following will appear:
- Title (headline)
- Date the news will be published in
- Content free fill
- Upload headline image
- Toggle non off for comments and likes
- You press either create news or "close"

Once you press "create news" you're given the option to pick certain member groups in case the news article is targeting one group or multiple groups and not the entire organization/ city. This is through a drop down list, after picking the groups you press "next" and move towards the "news publish methods" where you select whether you want the members to be informed through SMS or email or both. After picking, you click next and are taken to the same flow as the broadcasts. If you don't want a specific member group and are sending it to everyone, you press skip and move towards the same broadcast flow where you:
1. Pick an email template
2. Review the email
3. Have the option to send test
4. Press "review" if you want to edit

5. Press next to move to the SMS broadcast
6. Have the option to send test
7. Review it by editing it
8. Save draft for later (moved to the drafts in the broadcast tools in SMS)
9. Send it by pressing "Next"

View more

If we press "eye" icon next to each news a pop up with the following will appear all pre filled and uneditable:

- Title (headline)
- Date published
- Content
- Image

At the right end of the pop up you either get to cancel and do nothing or edit the news.

Edit

The same pop up be enabled for editing

cancel

You go back to the main page

Trash can icon:

It's the delete icon, Like standard when you press it the usual "Are you sure you want to delete" "cancel - delete"

Views:

This will be **unclickable** showing the number of people who viewed this news article. It's at the end of each news row.

Comments and Likes:

These will be clickable buttons where the admin can see the number of likes and comments each news article has.

When the comments button is pressed the comment section opens to show all comments. Next to each comment there is an option to hide it in case of malicious comments. If you press hide you have 10 seconds to undo the action. If there are hidden comments then the admin can click on the "show hidden comments" on top which switches the pop up to show hidden comments with the option to unhide them.

If you press the "likes" button then a list of members who liked it will appear in a pop up.

If either or the comments/likes are turned off then their square would be red with "off" and unclickable.

4. <u>Resources:</u>

This section will show the resources (previously named services) which are just static information that show the residents their services and resources in their area/city

The city admin gets to manage which resources will be viewed by the residents in the similar manner to how they pick which inquiries to present to the residents.

Here the preset resources will have an on-off toggle if toggled off the resource section will not appear to their residents, if toggled on it will appear to them.

You can search the resources specifically, select resource category, or select provider to make it easier to navigate and search.

View more:
If you press "view more" next to the specific resource a pop up will appear with the following information already prefilled:

- Resource title
- Content of the resource (description)
- Provider
- Category
- Website

At the right end of the pop up you either get to delete the resource or edit it.

<u>Edit</u>
The same pop up be enabled for editing

<u>Delete</u>
"Are you sure you want to delete this resource "cancel - delete"

<u>Create Resource</u>
On the top right corner if we press "create resource" a pop up with the following will apear:
- Title of resource
- Content free fill Description of said resource
- Provider
- Category (drop down list)

- Website

You either create or cancel/close

Under resources there's resource management where you get to manage the providers and categories.

a. Providers:

Here you see a list of providers. You can edit the providers information by pressing the pen icon, delete the provider by pressing the delete button and learn more about the provider through the (i) icon.

You can add a new provider by pressing the "create new provider" button on the top right. Once clicked a pop up will appear with two fields:

- Provider name
- Description

Once the information is filled you press save and the provider is added.

The edit button will open the same pop up with filled information for edits to be added.

If you press delete a pop up will appear to confirm deletion.

b. Category:

Here you see a list of Categories. You can edit the categories information by pressing the pen icon, delete the category by pressing the delete button and learn more about the category through the (i) icon.

You can add a new provider by pressing the "create new category" button on the top right. Once clicked a pop up will appear with two fields:

- category name
- Description

The edit button will open the same pop up with filled information for edits to be added.

Once the information is filled you press save and the category is added.

If you press delete a pop up will appear to confirm deletion.

5. Events:

The events page will have all the events posted for the members to see.

At the top right there is a "calendar view" which once pressed shows a calendar with the events listed in it as display only

In the main Events View page:

It is displayed in cards showing essential details like event title, date, time, location, and the number of registered participants. In the card there are the three "more" dots. If clicked the admin sees "view" - "edit" - "delete".

If you press on the view, a page opens showing all event details with two analytic cards at the top for RSVP numbers and ticket numbers.
Note that sometimes either or of these two will be turned off which means sometimes it can be one analytic or either of them. If you click on the analytic a page will open with more information.

- FOR RSVP:
    - Event title and date-time
    - Number of accepted RSVPS
    - Number declined
    - Number pending (still did not accept of decline)
    - List of all members and the date they accepted/ declined the RSVP and the RSVP status

You can pick to view and filter them by status *only view attending members/ declining members/ pending members*

- FOR Tickets:
    - Event title and date-time
    - Number of tickets sold
    - Number of tickets left
    - List of all members and the date they purchased the tickets and quantity of tickets purchased.

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If you press edit a pop up shows you all the information you can edit.
If you edit major information like location or time and data a message is sent to the RSVPed members informing them of the changes.

At the end of the drop down there is "delete" to delete the event. If pressed a pop up confirming the deletion will appear. Once clicked notification will be sent to the RSVped members about the cancellation of the event.

You can press the "add event" button which opens up a tab where you can add event pictures, event title, event description, event time, event date, toggle if its all day or not

Add a search bar to enable admins to search for events by name, date, or location.

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You can press the "add event" button which opens up a tab where you can add event pictures, event title, event description, event time, event date, toggle if its all day or not

- Event Title: Enter the name or title of the event.
- Event Location: Provide the venue or location of the event.
- Event Organizer
- Event Recipients drop down list
- Event Description: Enter a brief description or overview of the event.
- Event Date and Time: Select the date and time of the event from a date picker and time drop-down menu.
- Event Image/Banner: Allow administrators to upload images or banners representing the event.
- Toggle on-off if it's All Day
- Toggle on-off if it has RSVP
- Toggle on-off if it has tickets
    - If you toggle tickets on then a new field with the number of tickets and the ticket price will be displayed. These show the limited number of tickets and the prices displayed for the members.

Another Subsection in this page is the Past Events Page:

PAST EVENTS:

Here the events that have already ended are displayed. On the outside you can see the number of RSVPs and tickets sold in the relevant cards. If you press view more the same page as the current view more opens like this;
page opens showing all event details with two analytic cards at the top for RSVP numbers and ticket numbers.
Note that sometimes either or of these two will be turned off which means sometimes it can be one analytic or either of them. If you click on the analytic a page will open with more information.

- FOR RSVP:
  - Event title and date-time
  - Number of accepted RSVPS
  - Number declined
  - List of all members and the date they accepted/ declined the RSVP and the RSVP status

You can pick to view and filter them by status *only view attending members/ declining members/ pending members*

- FOR Tickets:
  - Event title and date-time
  - Number of tickets sold
  - Number of tickets left
  - List of all members and the date they purchased the tickets and quantity of tickets purchased.

If you press Edit, Then the same pop up as the one in the upcoming events opens. The only difference here is that the event details are not editable and there is a field to upload event images.

Broadcast Tools

<u>6. Broadcasting list: In-App</u>

On the left menu, there are the broadcasts. Once pressed the menu drops down to show all types of broadcasts (sms - email - in app). The in app is the last one. Once pressed the "create in app notifications" page opens. There we'll see:

1. Select target audience (group members)
2. By enabling the "schedule for later" you'll get two new tabs: select date (drop down list) and select time drop down list)
3. Subject: Title of the notification
4. Notification content: the details of the notification

At the bottom left there's:

- Clear text: which is a faster way for the user to delete and clear all content and information filled.
- Save As a draft (which once clicked will take the notification into the drafts file)
- Push notification: will send the notification out or send it to the scheduled notifications if the schedule notifications toggle is on.

The Scheduled Notifications Page:
Contains all the draft scheduled notifications as assigned by the user in chronological order. Each Notification shows all the information (target audience, subject, content, schedule for). These information can be edited by pressing "Edit notification" bottom which will open a pop up of the same info editable with "save" and "cancel"

The Drafts Page:
Contains all the draft notifications that were previously sent to the draft page. Similar to the schedule notifications you can press edit but instead of "save" you push the notification.

Notifications History Page:
Contains all the notifications sent. You can search for specific notifications in the search bar on the top right or sort them chronologically or alphabetically.

7. Broadcasting list: Email Campaign

On the left menu, there are the broadcasts.Once pressed the menu drops down to show all types of broadcasts (sms - email - in app). The "Email Campaign" comes in the middle. Once pressed the "create campaign" page opens. There we'll see:

1. The tab showing the overview of:
    - total emails sent, total delivered emails, total opened emails, total clicked emails.
    - At the front of the tab there's "30 days" which is a drop down list where the user can change which time frame in which they want to see the emails from within that time frame.
    - The table list shows email subject , date sent, and status of the emails.
    - You can sort these emails in chronological order or in alphabetical order

In the table column at the right side there are three dots that once pressed show "View report, Duplicate email, delete".

a. View Report

If you press view report: a page of reports opens up showing the email stat:

General:
- Number of delivered emails
- Number of bounced emails

Performance (last number of days):
- Number of opened emails
- Number of clicked emails
- Number of emails reported as spam

Conversion (total emails):
Total number of emails
- Number of opened emails
- Number of clicked emails
- Number of emails reported as spam
- Number if emails delivered
- Number of emails bounced

Once you click on any of the stats reported, it leads to the "Email Engagement" page that has all the recipient emails for each category (all, opened, clicked, reported as spam, delivered, bounced)

On the top right there is an "export" button that allows you to export this page's data and a back button (on the left) to go back to the report page.

b. Duplicate email

The email is simply duplicated right away

c. Delete

A pop up shows up asking if you're sure you want to delete this email (cancel - delete) if you delete it it's fully done if you cancel you're back to the page. **<u>Create New Campaign:</u>**

On the top right of the page there is a "create new campaign" button. Once pressed a pop-up with three email templates shows up for you to pick from. Once the template is picked, you either click close which will close the pop up or "create".

If you press create, it leads you to the create Email page. In this page we have submit the info as follows:

- <u>To</u>: pick a group of members or all members
- <u>Subject</u>: free fill
- <u>Preview</u> Text: free fill
- <u>From</u>: Auto-filled

Under them there will be the email template being edited

Once the email is created you can press "review" which will open up the options to view the email in desktop or in mobile version where editing in disabled.

if you want to make edits after reviewing it you press "edit email" which will bring you back to the editing email page you were on initially.

On the other hand, after reviewing its form, you can press "schedule send" on the top right of the page. Once pressed a pop up comes up where you pick to either schedule send it "now" or "custom date and time" which once picked will drop to show selected date - select time and then you send.

There's also a three dots drop down which allows us to pick to either delete the email (once pressed the usual are you sure confirmation comes up in pop up form) or "send test".

Send Test: means to send a test email which once pressed opens a pop up where you can add up to 6 emails and send the test email campaign to. The emails will be similar in style to what sharing to emails on google doc is like.

Once sent we'll get the confirmation on the right bottom of the page that the emails are sent/ scheduled/ deleted.

There is also a save draft button at the top of the email being created/edited in the process. If pressed the email is moved to the drafts file.

In the Email Campaigns menu tab on the left, we press on "***scheduled emails'*** ' to view scheduled email titles and their scheduled dates of sharing. They can be sorted by chronological order or alphabets and searched individually in the search tab on the right. If you press the three dots drop down you can pick to "edit" the email, "duplicate email" and "delete".

In the Email Campaigns menu tab on the left, we press on "***Draft Emails*** ' to view Draft email titles and their last updated dates. They can be sorted by chronological order or alphabets and searched individually in the search tab on the right. If you press the three dots drop down you can pick to "edit" the email, "duplicate email" and "delete".

8. Broadcasting list: SMS Campaigns

On the left menu, there are the broadcasts.Once pressed the menu drops down to show all types of broadcasts (sms - email - in app). The "SMS Campaign"is the first option in the list.

In the create tab you get a page where you enter:
- Campaign Name
- Target audience (drop down list)
- Text Message content with 160 character limit
- The option to schedule sending the message for later through a toggle
- The option to send test message with the button under the phone
- The option to save draft
- The option to review campaign

If you press "**send test**" a pop up appears where you can add up to 6 numbers and send the test text message campaign to. The message will be similar in style to what sharing to emails on google doc is like.

Once sent we'll get the confirmation on the right bottom of the page that the emails are sent/ scheduled/ deleted.

Schedule for later:
If you toggle schedule for later the field opens to include:
- Select Date
- Select time

By pressing the review campaign you're reviewing and confirming all the details to avoid mishaps. If anything needs editing you press the edit button next to it, if all is good you press "send now".

Scheduled Campaigns:
In the SMS Campaigns menu tab on the left, we press on "scheduled Campaigns ' to view scheduled campaign titles and their scheduled dates of sharing. They can be sorted by chronological order or alphabets and searched individually in the search tab on the right. If you press the three dots drop down you can pick to "edit" the email, "duplicate message" and "delete".

If you press on the campaign name, a page will open showing the progress "estimated campaign recipients, campaign will start in" as well as what the text message is.

- On the top right there is a "cancel campaign" in case you wanted to cancel it of which when pressed a pop up for confirmation shows up
- On the top right there is an "edit" in case you want to edit the info and details of the campaign

Draft Campaigns

In the SMS Campaigns menu tab on the left, we press on "***Draft***" to view Draft SMS titles and their last modified dates. They can be sorted by chronological order or alphabets and searched individually in the search tab on the right. If you press the three dots drop down you can pick to "edit" the SMS and "delete".
If you press edit you'll return to the edit campaign page and the flow repeats itself.

History
This tab shows a table list of the campaign names and their last modified dates and times. You can search and sort by these past SMS campaigns.

In the table column at the right side there are three dots that once pressed show "View report, delete".
The view reports opens the page of reports for SMS broadcasts that show:

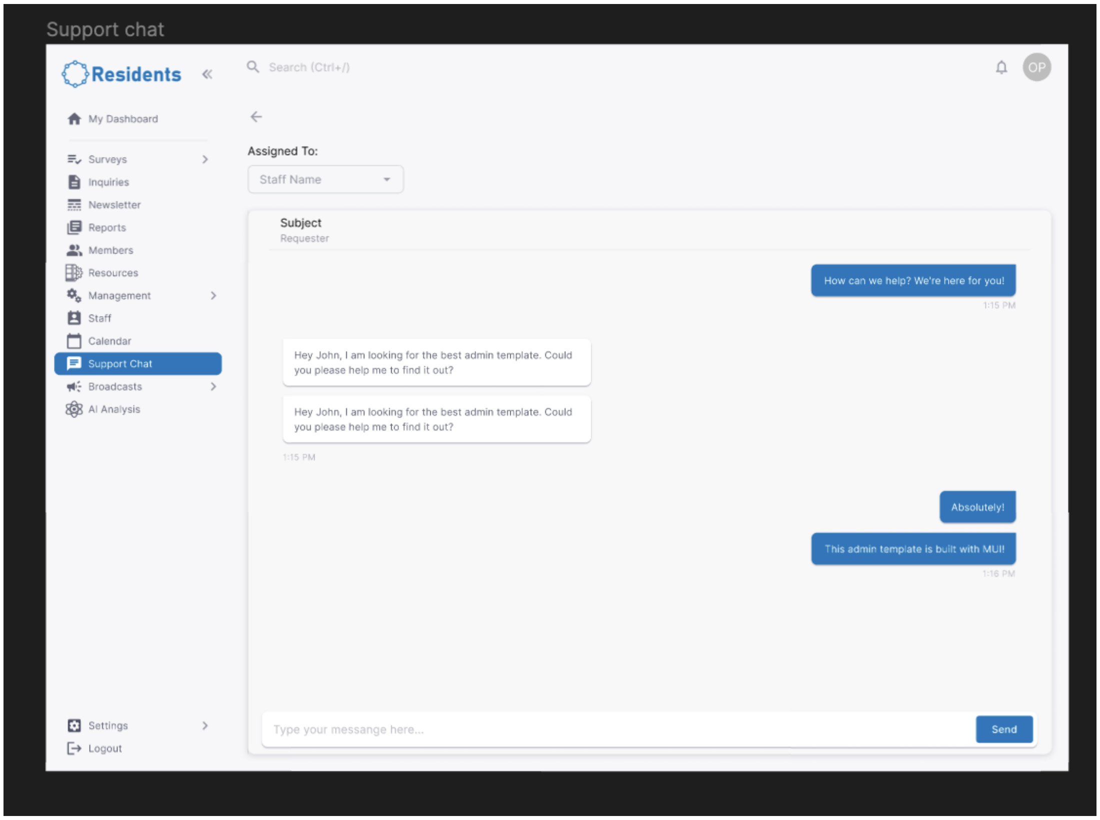
- Delivered
- Undelivered
- Read
- Sent
- Failed
- Null

9. Support Chat:

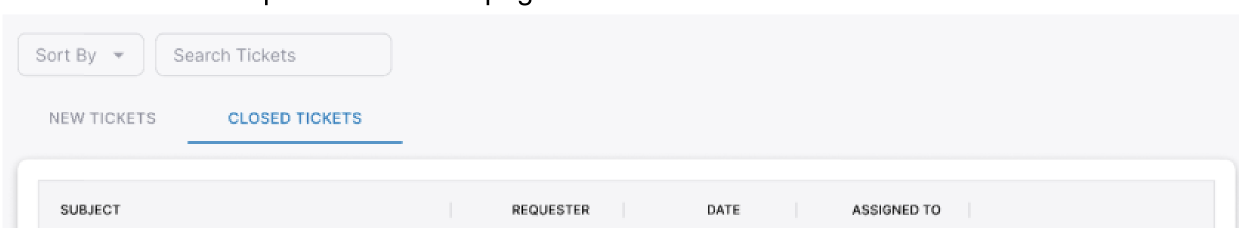
This section the support chat between the client and the members

"Support Chat" when pressed a page showing the support chat will show up. The page contains a table list of support tickets by title, the email of the member issuing the ticket, the date of the issue, who the ticket is assigned to, and a tab to view the ticket.

Once you press to view the ticket, the chat opens showing the tab to assign the ticket in a drop down list, the chat itself led by the Subject of ticket and the requester.



Once the reply is sent, and the ticket is resolved, the ticket moves from "new tickets" to "closed tickets" tab on the top of the table list page.



You can delete a ticket by pressing the three dots at the end of the column which shows the delete option with the usual "are you sure you want to delete" pop up.

Note that the ticket is moved to "closed" after the staff spresses "close ticket" tab at the top of the chat. The ticket only closes if both the member and the staff/admin both close the ticket to avoid misunderstandings and miscommunication.

10. General Reports:

This section will show reports on members.

Here the admin and staff will see each member's and information about their activity and report their activity across all features. Once pressed there will be a list with shows: Report Name It will include:

- Surveys: ratio of response per surveys
- Which type of survey gets answered the most
- Total responses to surveys
- Average time to answer surveys
- Sessions overtime (how many logins)
- What group of residents answers the most amount of surveys
- Which areas partook the most in surveys
- Mobile vs. Desktop Response Rates
- Survey drop off analysis (how many people accessed and dint complete the surveys)

Once you press on "view report" a graph representing the overall report is shown 1st. Under it will be a list view of:

- Name of membership type (monthly/yearly), latest activity, surveys completed, inquiries submitted, payment amount, and payment status.

- If you press export at the far top right a pop up with a drop down list of what type of export type will show up with the buttons export and close.
- There will be a weekly overview graph analytic of activity and engagement

- If we press "Select Survey Completed" we'll see a list of residents who completed this number of surveys
- If we press "select inquiries submitted" then we'll see the list of residents who submitted this number of inquiries

These can be filtered and edited by dates.

11. Members:

This section will focus on the residents, viewing them and controlling the data, etc…

All Group Members:

As mentioned above, the user when sharing a survey will get to pick "member group". In the member section, the user can multi select and group members together into categorical groups to further make their job easier (For example, members residing in Neighborhood 1 in one group, etc…) This can be achieved by multi selecting residents and pressing the "+create new group" option at the top right.

Once you press the create new group button a popup will show up where you get to name the group and officially create it.

Import File:
The admin can import a file of residents/ data using the import button. Once imported, the user will get a pop up asking him if he wants to "generate invitations to residents within this imported file" in order to make the verification process easier for him. The admin can press "later" to move on or generate them.

In the case the user does not generate invites, on the top left there is a generate invitations tab where he can press the members he wants to send an invitation for. When bulk selecting, the option to generate invites also appears at the bottom.

Filters:
The residents page will be very packed, we're taking in large numbers, hence we have the filters. Once you press the "filters" at the top right corner of the page, a sidebar of filters will appear on the right side of the page as well. Residents will be filtered according to:

- Specific name search
- Sort By: Alphabetically, etc..

- Age Range: Here we'll have the tool be like the price range on amazon and ali express where you pick maximum and minimum age you want to view
- Zip Code: Same as age, you select it within a range (ex:90001 - 90008)
- Status Filtering: Filter by who's enrolled, who's invite is confirmed, and who's invite is still pending
- Location Map: Where the user gets to pick a radius on the map on the map to filter and show residents living within this radius

Bulk options:
The user can press the check icon on the table and select all residents within the group/ all residents in general. Once he does that at the bottom quick actions will show us which are "generate invitations - Create New Group - Move to group - delete"

View Profile:
Pressing on view profile will open up a big pop-up showing the general information of the resident (Name - Last name - Email - phone number - Complete Address - Date of birth - Payment history*). Here the user either edits the information or deletes the profile.

Payment history*

The payment history will show the last two payments with the payment type - date of payment - amount paid - and payment status)

Delete Profile:
By pressing delete profile a pop-up shows up asking to ensure whether we're sure we want to delete the profile.

New Member Verification Subsection:
When members sign up, some might use the option of sending a bill or receipt as an address verification method. In this case, once the member has sent their receipt file, it is received in the admin panel in the "new member verifications" section under the members tab.
Once the staff/admin opens the page, they're greeted with the table list showing member name, last name, email, phone number, zip code and zip code with a "view details' ' button at the end.
Once they press the view details, the full profile info will pop up with the bill/receipt attached for the admin to review.
After reviewing the bill, the admin/staff can press "accept" which moves the member to the all members tab and sends them an email that they can login their account now.
If they press reject then they'll send an email to the member that their sign up was rejected due to inaccurate information.

12. Payments management

Payments management

Payment management will allow the admin to control the resident membership payment methods.

Payment methods will have a toggle on off for stripe as a payment method,

When you open the page it's usually empty with a box saying "payments": No Payments created yet

- There is a "create new payment" button that allows the admin to create more than one new payment
- Once you press this button a pop up shows up asking for the following information
    - Recipients
    - Title of the Payment
    - Description of the Payment

- Type of payment (drop down list if recurring or one time)
    - *If you press **recurring**: two new fields open:*
        - Drop down list of the occurrence (monthly yearly)
        - Amount of the paid
    - *If you press **One tim**e: two new fields open:*
        - Deadline date
        - Amount of the paid

Once the payment is created it'll show up in the "payments" and you can:
- Edit it by pressing the pencil icon
- Delete it by pressing the trash icon
- See list of people who paid with the upper tab showing overall total number of people who paid, number of people who didn't, Pending payments

You can filter the analytics and payments on top by pressing the date which opens a calendar and you can select the range you want

13. Verification management

Verification management will allow the admin to control the resident verification payment methods.

For Identity verification methods:
- You toggle on either phone number verification (6 digital code visa SMS) or email code. You toggle on-off the choice of feature.

For Address verification methods:

The admin can pick to:
- auto verify
- no verification option

Verification options are:
- Mail letter: If you toggle on **mail letter**: a letter with verification will be sent to their address through mail
- Bill/ receipt: If they toggle on bill/receipt the admin will have to verify the residents based on a submitted bill/receipt that has their full name and full address
- Geolocation: The location will be verified on phone using exact location

They can toggle all on at the same time.

<u>14. Staff:</u>

This section will focus on the staff, viewing them and controlling the data, etc…

View Profile:
Pressing on view profile, the admin sees the staff-profile with the following info:

- Name - Last Name - Email - Phone number - Address - DOB .
- Staff Permission:
  Here the admin sees and controls the permissions this staff has (View - Manage - none) for the survey, inquiries, reports, newsletter)

- If the admin presses surveys, the surveys permissions drops down open to show a click on which permission for the survey this staff member has (if only view - manage - or none) and a drop down menu of folders they have the permission to

Delete Staff Profile:
By pressing delete profile a pop-up shows up asking to ensure whether we're sure we want to delete the profile.

Add New Staff:
By pressing on this button a pop-up similar to the view profile will show up except this one will be empty and the admin will have to fill it up with all the previous info. (plus permissions in a drop down list - view manage)

- when we add new staff member a code is sent to the staff members email with their account and temporary passcode that they can change after logging in

Bulk options:
The user can press the check icon on the table and select all residents within the group/ all residents in general. Once he does that at the bottom quick actions will show us which are "generate invitations - delete"

Filters:
The staff page will be very packed, hence we have the filters. Once you press the "filters" at the top right corner of the page, a sidebar of filters will appear on the right side of the page as well. Staff will be filtered according to:

- <u>Specific staff name search</u>

- Sort By: Alphabetically, etc..

- Zip Code: Same as age, you select it within a range (ex:90001 - 90008)

- Permissions: Can filter the staff based on permissions:
  For example: Staff that have access to Surveys: Manage Survey, Folder 5
  Staff that have access to Inquiries: Manage Inquiries, Animal Services

ALL THINGS UNDER "setting" on the side bar:

15. FQA

Under the profile section on the sidebar there will be a subtitle "account" which will be the "my account" section

will update the questions later

16. Account

Under the profile section on the sidebar there will be a subtitle "Account" which will show the following:

- **General info:**
- First name
- Last name
- DOB
- Email
- Phone number
  (Edit information)

If they change any of the information here and press save a pop up asking them to verify their identity either through phone or email will show up. Once they pick their preferred method of verification it will lead them to the verification code input and "submit"

- **Address**
  (Edit information)

If you press "edit information" here the address will expand to show "state" "city" both drop down lists.

"Zip code" which would be number input.
"Address" which would include the entire address

If they press save change then address change will need admin approval they pick either by reciept or bill or by mail letter. If they press through receipt/ bill the pop up will change to an upload image file where they upload their reciepts and submit. If they press mail letter then the pop up should show them "a verification mail letter will be sent to your address soon, please be on the look out and thank you for your patience in the meanwhile"

- **<u>Password</u>**
  (change password)

If they press change password then this will expand they will have to type:
- Current password
- New password
- Confirm new password

And then save changes

<u>17. Notifications</u>

Under the profile section on the sidebar there will be a subtitle "notifications" here the user will control the type of notification they are received and how (browser or email)
This will be through check marks where they pick for instance if they'll receive notification that they were assigned a task through email or browser. When this section is pressed it's usually static and non editable until you press the "edit notifications' ' button at the tight corner of the page to avoid accidental changes.

Overall types of Notifications:
- Account activity
- A new login attempt using their email
- You were assigned an inquiry
- Confirm personal profile changes
- Reminder of inquiries unread in 24 - and then 48 hrs
- New user sign ups for verification
- New survey responses-- → Survey Responses reached a milestone (150 responses - 500 responses - 1000 responses)
- Staff survey management
- Staff inquiry management

<u>18. Ticketing AKA "Provider Support"</u>

Located under the Setting called "Provider Support"
This is a support system for when the staff or admin need support from us as providers of the service.

Main Page:

Main page will be split into three sections: Live Tickets and Closed Tickets and Draft Tickets.

Live Tickets:

- Create a tab or section to display a list of all support tickets raised by the city admins.
- Each ticket listing row shows its status, category, priority, subject, and the date it was raised.
- The order of the table would be: Subject - category - sender (staff member/admin) - date issued - priority - status - *view more*
  - Statuses:
    - **Open**: The ticket has been created but has not been assigned to a support agent yet.
    - **Pending**: A support agent is actively working on the ticket to resolve the issue.
  - Categories:
    - **Account and Profile:** Issues related to account settings, password recovery, or profile information.
    - **Technical Support**: Problems with website functionality, app usage, or other technical issues.
    - **Billing and Payments:** Questions or concerns related to invoices, payment processing, or subscription plans.
    - **Feedback and Suggestions**: Ideas or suggestions for improving the service or platform.
    - **General Inquiries:** For non-technical questions or general assistance.
    - **Events and Activities:** Specific inquiries related to events, activities, or community engagement.
    - **feature requests:** Request help for specific features

- Priorities:
    - **low**: Non-urgent issues that can be addressed at a later time.
    - **Medium**: Important but not critical issues that require attention relatively soon.
    - **High**: Urgent issues that need prompt resolution to avoid further complications.
    - **Critical**: Critical issues that demand immediate attention and resolution to prevent major disruptions or emergencies.

- Allow users to search, filter, and sort the tickets based on various criteria.
- A delete icons will be present next to the view more, if you press the delete icon a confirmation pop up shows up to confirm deletion

View More:

- At the end of each list there's a "view ticket" action button
- Once pressed, they are taken to the ticket details view.
- They can see the ticket's full description, status, priority, assigned agent answering them, and any updates provided by the support team.
- The details view also includes options to add comments or updates to the ticket.

Closed Tickets:

- This page shows the closed tickets with the list showing their Subject, Category, sender, Date issued, date resolved, and the action button to *view more*
- By pressing view more you're seeing a pop up with They can see the ticket's full description, status, priority, assigned agent answering them, and all updates provided by the support team.
- A delete icons will be present next to the view more, if you press the delete icon a confirmation pop up shows up to confirm deletion

On top of the tickets main page there will be an action button to create a new ticket (elaborated after).

Draft Tickets:

- This page shows drafted tickets.
- Each ticket listing row shows its category, priority, subject, and the date it was initially written in. There will be an action button to "continue editing" and a delete icon.
  So in order: Subject, Category, sender, Priority, Date issued, and the action button to "continue"
- Once you press to continue editing the same page of the new ticket shows up with the ability to continue editing then submit
- If you press the delete icon a confirmation pop up shows up to confirm deletion

Create New Ticket

- Add a prominent "New Ticket" button on the top
- clicking this button to create a new support ticket.
- The ticket creation form includes fields for category, priority, subject, description, and attachments (if necessary).

1. Subject is similar to how you write the subject of an Email field.

2. Category field is a drop down list of the following:

    - **Account and Profile:** Issues related to account settings, password recovery, or profile information.
    - **Technical Support**: Problems with website functionality, app usage, or other technical issues.
    - **Billing and Payments:** Questions or concerns related to invoices, payment processing, or subscription plans.
    - **Feedback and Suggestions**: Ideas or suggestions for improving the service or platform.
    - **General Inquiries:** For non-technical questions or general assistance.
    - **Events and Activities:** Specific inquiries related to events, activities, or community engagement.
    - **feature requests:** Request help for specific features

3. Priorities field is a drop down list of the following:

- **low**: Non-urgent issues that can be addressed at a later time.
- **Medium**: Important but not critical issues that require attention relatively soon.
- **High**: Urgent issues that need prompt resolution to avoid further complications.
- **Critical**: Critical issues that demand immediate attention and resolution to prevent major disruptions or emergencies.

4. Description is an open field to write up to 300 words describing the issue
5. Attachment in case they need to attach a screenshot of the problem

A submit action button which will generate a confirmation message at the corner that the ticket was submitted successfully.
A cancel action button which would trigger a confirmation pop up
A save as draft button to save the ticket as draft

19. Dashboard

Will Include the following metrics:

Engagement Metrics:

- Live Visitors
- Log in by day
- Total Visits (website - phone)
- Average time spent

General Survey Metrics:

- Number of Surveys Completed
- response rates

Newsletter Engagement Metrics:

- open rates
- subscriber growth

General Inquiry Metrics:

- number of inquiries received
- average time taken to respond to inquiries.
- highest category of inquiries department for the month

20. The Store Tab feature:

The Store Tab feature:

The Store Tab feature allows cities/organizations to sell their merchandise or products directly to their members. This feature is optional and can be activated or deactivated by the admin based on their preference. When activated, organizations can list products, manage orders, and fulfill purchases seamlessly.

On the sidebar, the store page will have 3 sections. It's going to be shown like this:

So it will be:

STORE >

- Products (will contain products and categories)
- Orders
- Emais
- Sales overview

1. PRODUCTS:

When you press all products on the sidebar you'll get this page

This Page will be split into two sections:

1. Products
2. Categories

The first section is the All products page. When you click that page you'll see all the products and merchandise with their details and the ability to add and manage products.

The product page will showcase products in a list-like manner. The columns would be as follows:

- Miniature picture of the product

- Product name
- category
- Status (this will be a toggle on - off for products where they toggle it on when the product is published and toggle it off when the product is not available)
- Stock
- Price
- View more
- Delete icon

<u>If you press view more you see:</u>

- Product Name
- SKU (Stock Keeping Unit)
- Description
- category
- Price
- Stock Quantity
- Weight
- featured image *main image that will be displayed*
- The Images of the products
- Number of orders
- Action buttons:
  - Edit
  - Delete (A confirmation prompt might be included to prevent accidental deletions)
  - Cancel

If you press "edit" the information will be editable and you can go over all the details and edit them, the action buttons will become:

- Save changes
- Cancel

<u>ADD NEW PRODUCT:</u>

On top of the lists on the far right there is an "***add new product"*** action button. Once pressed a pop up shows where the admin has to fill in and input the following information:

- Product Name
- SKU (Stock Keeping Unit)
- Description

- category
- Price
- Stock Quantity
- Weight
- Set featured image *main image that will be displayed*
- Upload up to 5 Images of the product
- Action buttons:
    - Publish: product listing will go live on the website
    - Save Draft: Save the product as a draft to continue editing later.
    - Cancel: Discard changes and return to the products page.

At the top there is an "import" button. Once pressed, it shows a pop up where you pick either CSV or Excel and then browse and add the file.

You can bulk select multiple products and at the bottom of the page a small bar that shows quick actions: Disable - Enable - Delete *example down from the survey page*

Side page - draft products same structure but they're offline and view more is called contin

Filters:

When you press filters the side bar opens on the right *see members filters*

Filters:

- *Stock status *available, unavailable"*
- *Price range*
- *categories*

Sort by:

- *Featured*
- *Newest*
- *Best Selling*
- *Price: Low to High / High to Low*
- *Alphabetical*

- *Stock Availability*

On the top next to the filter and sort by, add the search bar in all pages!!!

Note: When a product is out of stock, it will automatically be marked as unavailable on the storefront (toggle turned off).

1.2. Categories

This page has a list of categories of products that are offered. They're listed in list view. The list columns would be as follows:

- Category Name
- Date added
- Category Description
- View Products
- Delete icon

Once you press view products a pop up will appear with a list of products under this category. *literally listed*

At the top right there will be an "add category" button. Once pressed a pop up will appear where you fill in these fields:

- Category Name
- Category description (10 words max)
- Cancel action button

If you press delete the usual pop up for confirmation appears.

Add a search bar

Add sort by

2. ORDERS PAGE:

When you press the orders button on the sidebar under Store you'll get this page:

Ob top of the page show the statistics the way we had shown bel tickets. Add:

- *Total orders*
-

3. **The Second Section shows the Orders. It will be cut into two parts "ongoing orders , closed orders"**

<u>The Ongoing orders:</u>

This page will display a list of all orders received

Each order will be listed with essential details which are:

- Order number
- Date
- Customer name
- Order total $$
- Status
- View more action button

The statuses will be:

- *Pending: Order has been placed but not processed yet.*
- *Shipping: Order is being shipped to the customer.*
- *Delivered: : Order has been successfully delivered to the customer.*
- *Returned: Customer has returned the order items.*
- *Refunded: Payment for the order has been refunded to the customer.*

The ***view more*** action button opens the detailed information about the specific order. This includes:

- Shipping information
- Billing information
- Products ordered
- Quantities and prices
- Product Subtotal cost
- Shipping cost
- Total

- Order Timeline

The admin panel will provide search and filtering options to help the organization quickly find specific orders.
Filters may include:
- date range
- order status
- customer name *alphabetical*
- order numbers (descending - ascending)

On the top next to the filter and sort by, add the search bar in all pages!!!

The past Orders Page:
Same list but the status will be "closed" and when you press view more you just see the order details with a delete action button only.

3. Emails

On the sidebar, replace personalization with emails. Once the page loads, on the side, there will be a sidebar.

It will be listed as:
- **All Emails**
- **Email Templates**
- **Automations**

<u>3.1. All Emails:</u>
<u>This page will contain "emails sent" and "drafts"</u>

<u>For the emails sent:</u>

This page will show all emails sent in a list format. The columns will be:
- Subject

- type
- Date
- View Email action button
- Three dots that once you click show you these actions: Delete , Duplicate Email

At the top there will be action button "Send email"
Once you press view email the page will expand to show all emails with the top being a header with the subject, the date, the recipients and then the email. At the end of the email there is a delete and cancel action buttons. Don't forget the confirmation for delete.

If you press "Send Email" button on top right, a pop up will appear asking you to pick "custom email" or "pick template"

If you pick "Custom Email" the email page will open and the admin fills in the following information:

- Email Subject: The admin provides a name for the email (e.g., "Order Confirmation").
- Types - drop down list showing these options:
    - Order Emails
    - Follow up Email
    - Shipping and Tracking Emails
    - Communication Emails
    - Feedback and Surveys
    - Abandoned Cart
- The email will be under it where the admin can write the email

Once done, at the bottom right there will be a "preview" button where the admin can preview the email to see how it will appear to customers.
There will be a cancel button where they cancel the email attempt
There will be a save draft button where they save the email information
There will be a send button where they send the email attempt

- Add a search bar
- FIlter by Categories and by date of creation

Add Bulk Actions: Checkboxes next to each template allow you to select multiple templates for bulk actions, such as deleting or duplicating.

For the Drafts:

This page will show all emails sent in a list format. The columns will be:

- Subject
- type
- Last Date Edited
- Continue action button
- Three dots that once you click show you these actions: Delete , Duplicate Email

Once you continue email the page will expand to show all emails with the top being a header with the subject, the date, the recipients and then the email. At the end of the email there are Cancel and Save Draft, send email action buttons.

Don't forget the confirmation for delete.

3.2 Email templates:

This page the admin can view, create, edit, and manage different email templates.

Below the search bar, there is a list of all the available email templates. Each template is represented as a list. Each list shows imp information which are:

- template name
- Short description
- type
- Expand Email action button
- Three dots that when you click show Duplicate and delete

By pressing the expand email, the email template opens up as a large pop up where you preview the email, at the bottom right, there is an "edit" action button which opens it in full page view and enables editing and a delete action button where you delete *get confirmation pop up*. When it opens the editing page at the bottom right there will be action buttons "save" and "cancel".

Create New:

By pressing "create new template" button on the top right, a pop up shows up the admin fills in the following information:

- Template Title: The admin provides a name for the template (e.g., "Order Confirmation").
- Template Trigger: Admin chooses the trigger event (e.g., "Order Placed").
- Type - drop down list showing these options:
    - Order Emails
    - Shipping and Tracking Emails
    - Communication Emails
    - Feedback and Surveys
    - Abandoned Cart
- The email will be under it where the admin can customize the email content

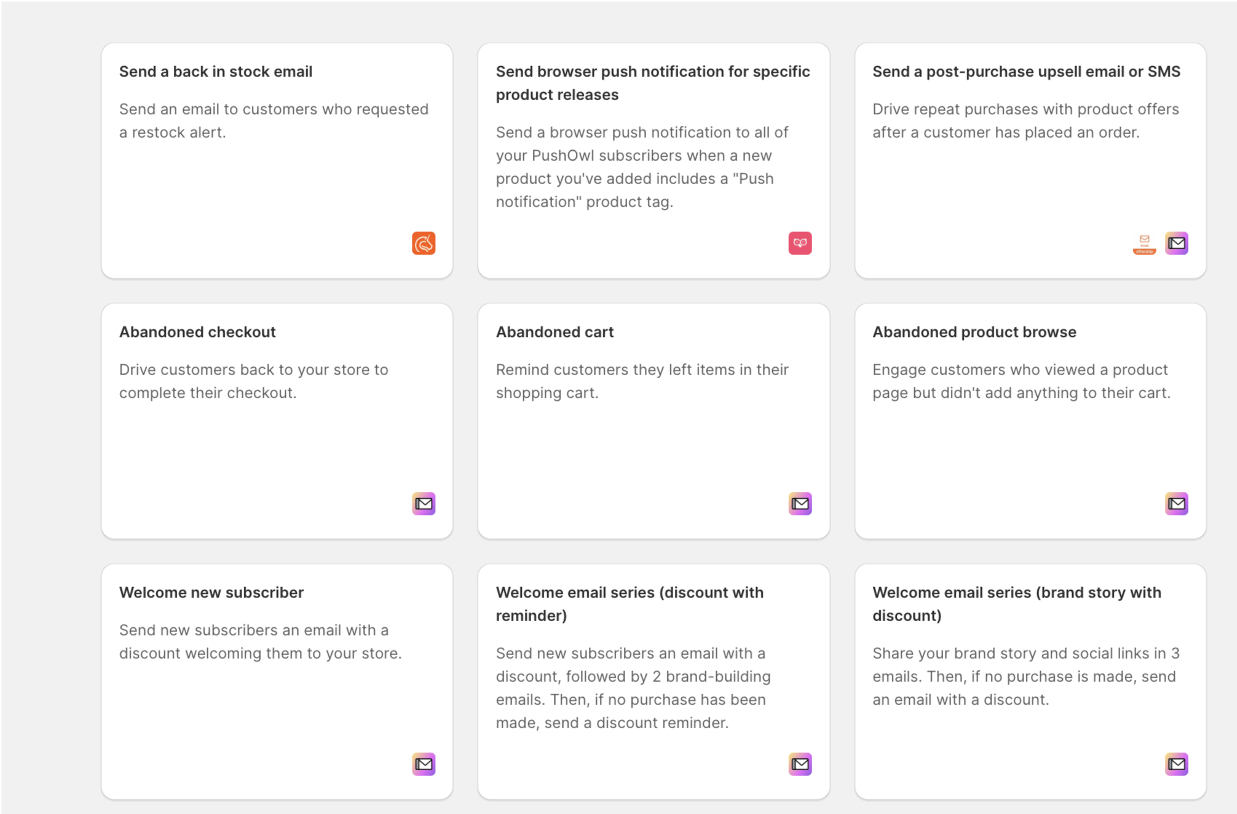
Once done, at the bottom right there will be a "preview" button where the admin can preview the email to see how it will appear to customers.
There will be a cancel button where they cancel the template attempt
There will be a save button where they save the template information

- Add a search bar
- FIlter by Categories and by date of creation

Add Bulk Actions: Checkboxes next to each template allow you to select multiple templates for bulk actions, such as deleting or duplicating.

3.3. Automations

This page shows automated emails. Lets have them in card form like this:



The exact same but with a delete icon and a toggle on-off which shows whether its active automation or not.

Once you press on one of them, A pop up shows where you see the template email and the following information:

- Template Title: The admin provides a name for the template (e.g., "Order Confirmation").
- ***Template Trigger: Admin chooses the trigger event (e.g., "Order Placed").***
- Recipient
- Type
- The email will be under it

The action button at the end of the email will be: Edit and delete. if they press edit the information becomes editable and if they press delete they get the confirmation pop up. When they press edit and finish editing, the action buttons would be "update automation" and "cancel"

At the top right there is an add new automation action button, once pressed the admin gets a:

- pop up where they pick if they want a template or a custom one. If they pick a template they're taken to the template page where they see the template emails. Once you pick one, they click on it and it shows the email template in full view with the ability to edit information and action buttons "use" and "cancel".

If they pick to create custom automation, the same flow as creating a new template appears:

- Automation Title: The admin provides a name for the email (e.g., "Order Confirmation").
- ***Automation Trigger: Admin chooses the trigger event (e.g., "Order Placed").***
- ***Automations drop down list will include:***
  - Product restock
  - Sale Announcement
  - Abandoned cart
  - Welcome emails.
  - Post-Purchase Follow Up
  - Order Confirmation
  - Shipping Confirmation
  - Delivery Confirmation
  - Payment Confirmation

- Type - drop down list showing these options:
  - Order Emails
  - Shipping and Tracking Emails
  - Communication Emails
  - Feedback and Surveys
  - Abandoned Cart
- The email will be under it where the admin can customize the email content

4. Sales Overview

This page provides a high-level summary of your organization's sales performance and key metrics. It offers a snapshot of your sales data, allowing the admin to quickly assess the product performance. This page should include the following metrics and graphs:

- **Total Sales:** Display the total revenue generated from all completed sales transactions within a specified time period (e.g., day, week, month, quarter, year).

- **Number of Orders:** Show the total count of orders that have been successfully processed within the selected time frame.
- **Average Order Value**: Showcase the average amount spent by customers per order, giving insight into customer spending habits.
- **Top Selling Products:** List the best-selling products or services along with their sales quantities and revenue, highlighting which items are driving the most sales.
- **Geographic Distribution:** Show where your sales are coming from geographically, indicating regions or countries with the highest sales volume.

- Export and Share buttons on top right:
  Provide options to export the sales overview data or share it with colleagues for further analysis and reporting.

21. Feature Management

This tab contains the features of the admin panel with a toggle on-off. This page is only available in admin view so only the admin gets to control which features to turn on and off the admin panel.

If you turn the feature off, it's deactivated and won't appear neither on the admin panel or the member panel and app.

21. NOTIFICATIONS ICON ON TOP RIGHT:

For the Admin, the notifications tab on the top right will be split into two:

- Personal:
  Includes Notifications about:
  - account activity (weekly You've spent xyz time on the admin panel)
  - A new login attempt
  - Confirming Personal Info Changes in their account (ex: you've successfully just changed your password)
- Work Activity :
  Includes Notifications about:
  - Milestone survey respondents (Surveys for the day have reached 500 respondents for example - 3 new surveys were created)
  - Inquiry Milestones (50 inquiries were answered today - 12 inquiries were left unattained for 48 hours)
  - Support Notification: 15 new support ticket chats
  - Newsletter Notifications: News article reached 30 comments - 100 likes milestones
  - Event Notifications: 500 people RSVPed this event - A new event was created
  - Provider ticket answered

For the Staff:

Only one section for notifications which includes:

- account activity (weekly You've spent xyz time on the admin panel)
- A new login attempt
- Confirming Personal Info Changes in their account (ex: you've successfully just changed your password)
- New Survey assigned
- New chat assigned
- New Inquiry Assigned
- Provider ticket answered

22. CALENDAR ICON ON TOP RIGHT:

The calendar icon on the top right opens a calendar which shows upcoming events as well with no action buttons, just an overview to keep everyone updated.

Reminders:

- Automation for mail, text message and email invite and unique verification codes
- Invite pending, invite sent, not invite, enrolled (statuses)
- If some residents imported have their phone number or name of some info missing, there should be a warning about this to bring it to the admins attention

- On app -> When signing up its either enter your unique verification code or "pick your organization" bteje metal pending bel general info

- When we press view profile, the unique code of the client should show up there

- When we export the list the unique should should come up as a column as well

- If the resident's info were imported but the resident was not invited and said resident went on the app to sign up using the info, it'll show an error like a message telling them that they're already enlisted in the mobile app, please reach out to the organization for full integration.

- Residents tab make it more like shopify in the way its friendly

Residents Member Panel:

1. Sign up/ Sign In

First page shows a split:

- login in as staff
- Join as a member

Once you press Join as a member. You have two options either joining by invitation code or joining as a new user. Invitation code means the organization or city sent you a unique code that you can use to sign up instantly without address verification.

- ***New User:***

The new user goes through four steps.

1st step: pick their city or organization from an autofill drop down list.
2nd step: after picking the organization/city and pressing "next" the user fills in their information which are:

- First name
- Last name
- DOB
- Email
- Phone number
- Password
- Password confirmation

After pressing next the page shows the identity verification which is the code sent to email/phone. If the code was not sent or received the user can press resend.

3rd step: with the identity verified in the previous step, now the user inputs their address information which contains:

- State (drop down list)
- City (drop down list)
- Zip Code
- Complete Address

4rth step: the fourth and final step is the address verification where the user picks whether they want to confirm their address through either:

- Mail:
  The page will show a "thank you a mail letter will be sent your way in the next couple of days be on the lookout"

- Receipt/bill:
  If picked, the page shows an attachment upload file where they can upload an image of a receipt or bill showing their info and address. Once this is submitted a thank you note saying their organization will verify and get back to you soon will show up confirming the process is done.

If the user picks an organization or city that doesn't allow external sign ups, an error note will show up telling them to contact their administration for an invitation instead.

- ***<u>Invitation Code:</u>***

If the user has an invitation code once they press the invitation code section, the 6 inputs will show up for code input, once the code is inputted they press "next" which takes them to the next page with their personal information pre-filled. In this page the following information should be auto filled:

- First name
- Last name
- DOB
- Email
- Phone number

They then add:

- Password
- Password confirmation

Afterwards, they press next which takes them to the last page showing prefilled address information, once they confirm all is good they sign up and it takes them to their dashboard!

2. NEWSLETTER

For the member, the newsletter shows squares with the news posted by the organization/ city. Once the member presses on a certain news article, the page containing the full news article is opened.

There is a like and comment section where the member can like and comment on the news which would create engagements.

3. SURVEYS

For the member, once they access the surveys on the menu the surveys main page opens where the current open surveys are viewed.

The page allows the member to navigate between current and archived surveys.

If the user presses "complete" they're taken to the survey tool where they answer the survey. After finishing it, the survey turns into "completed" right away.

After the survey is done and finished and expired, it moves to the archived surveys where there is a status showing whether the user completed the survey or didn't and the action button to view the survey.
The user can search for a specific survey or filter the surveys by:

- Date
- Completion

In the archived surveys section, the member sees the expired and finished surveys. The red status means the survey expired without completion and the green status shows that the survey was completed. By pressing "view survey" they are taken to the survey tool where they can view the survey but not edit or respond to it.

4. INQUIRIES

For the member, once they press on the inquiries on the side menu, the inquiries main page opens.

On the top you can see there are three tabs (live, closed, draft)

Live:
The main page shows all current inquiries that the member has sent. The squares show the inquiry number, the type, and the date it was issued in. by pressing "view inquiry" a new page opens showing details about the inquiry submitted.

When pressing view more, there is a delete inquiry button on the right corner, if they press it the usual "are you sure you want to delete"pop up shows up.
Closed:
Closed inquiries show inquiries that have been issued, submitted, answered and closed. By pressing view inquiry, the member can view details of the inquiry submitted + the response they received.

DRAFT:
By pressing "continue" in the draft inquiries section, the user can continue drafting their inquiry by seeing the step 4 as stated below in the new inquiry and editing missing information and then sending it out which automatically moves it to "live".

New Inquiry:
The floating plus (+) sign is the button which the user presses to send a new inquiry.
Once pressed, the four step process of creating an inquiry starts.

- **The first Step (page):** is where the user picks the general inquiry type by picking one option
  Once that option is selected the page drops down to show the inquiry subtypes that are more specific.

- **The Second Step (page):** is where the user add additional information about the inquiry:
  - This is dependent on what the admin has picked

- **The Third Step (page):** is where the user adds the location of the inquiry
  The user also reviews their contact information with the option to toggle on "send anonymous" if desired
  The user can then add additional information such as additional description and a photo attachment.

- **The Fourth Step (page):** is where the user in the final step reviews and confirms all the information submitted. They can press edit information on any of the steps and information submitted or press send.

If they at any point want to pause and leave, they press the "save and exit" button on the right corner which sends the inquiry to the DRAFTS section for them to finish later. If they submit then the inquiry moves to the live inquiries section.

5. <u>Resources</u>

For the member, once they press on the resources on the side menu, the resources main page opens.

The resources page shows the resources that the user can have. By pressing "view details" the resource expands to the whole page to show the entire resource details.

The user can search for specific resources
The user can filter and sort the resources by alphabets, type, provider, category.

6. <u>Calendar</u>

For the member, once they press on the calendar on the side menu, the calendar main page opens.

The calendar can be viewed by month, week, day, and list. During the day there are some events. Once you press on the event, the event expands to show all event details including date, location, time, and description with the poster and a tab that says "RSVP" which onced pressed a pop up shows up with the event title and whether the member (accepts) or (declines)

7. <u>Settings</u>

For the member, once they press on the settings on the side menu, it drops down to show them:

- **Account:**

By pressing the account, the member is taken to their profile. When pressed the user is taken to the page showing their information (name, email, phone number, address, dob, password).

> If the user presses "change" over the password the page switches to show three fields: Enter current password, enter new password, Confirm new password. After confirmation they're returned to the profile page
>
> If the user presses change phone number, the page changes to show: current phone number, new phone number, confirm number with action button to send verification code which drops down a field to enter the verification code and confirm.
>
> If the user presses change email, the page changes to show: current email, new email, email with action button to send verification code which drops down a field to enter the verification code and confirm.

If the user presses change address, we have to reconfirm the address just like the sign up. The user sees a pop up that says "are you sure you want to edit your address" once they press "yes" they're taken to the next page where they input their new address and pick their address verification method similarly to the sign up page and proceed similarly to the sign up process.

They're then temporarily logged out until the confirmation from the admin where they directly sign back in again.

Additionally, after an event is over, the member can go to their profile, access an "attended events' ' tab where they can see all past events they participated in. Once they press on a certain event, it will expand to show the event details with a gallery of the pictures taken in the event. These pictures would be uploaded by the admin later after the event is over and the attending member would receive a notification that pictures are uploaded and can now be viewed.

- **Support Chat:**

When pressed the support chat page is opened where the user has to:
- Input a subject for this chat *issue title*
- Then draft the first message *issue description*
- After the conversation is over, the user presses "close conversation" which closes the ticket from their end

- **FQA**

Shows a list of frequently asked questions that onced pressed drops down to show us the answers. (will provide these questions and answers later)

- ## **Notifications:**

When pressed the user is taken to the notification page where they control what type of notification they want to receive.