

# Multiple Users in a Customer

## Business Requirements:

1. Create a framework within the Collateral App that will allow multiple users to to be in the same scenario (rename "change?) or customer at the same time.

## Functional Requirements:

### Must Have's: (Work in process as of 06/21)

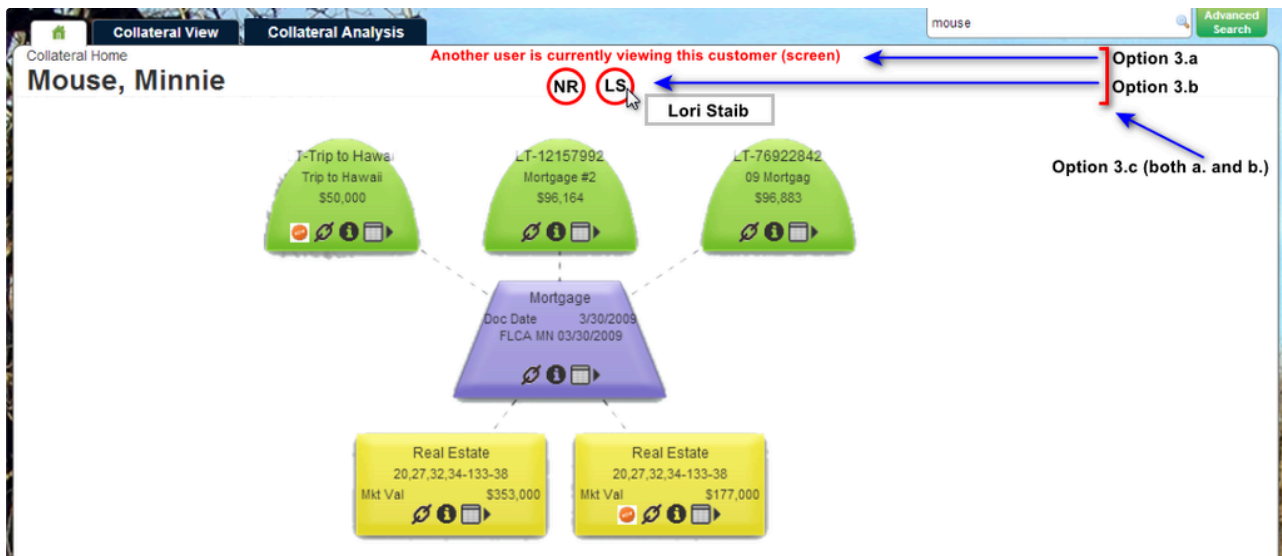
1. Multiple users must be allowed to be active and viewing a customer or collateral scenario (change?) at the same time.
2. When two or more users are in the same customer/change, they both need to be able to make changes and save any edits they have made at the same time.
3. When two or more users are in the same customer or collateral change at the exact same time, there should be an indicator in the top center of the screen to show this. This will always display on the screen when there are multiple user so that there is no confusion.
  - a. Option #1: This indicator will say "Another User is currently viewing this Customer" ("Screen"?)
  - b. Option #2: An indicator will appear that shows all users initials who are currently viewing the same customer.
    - i. When you hover your mouse over the initials, the users full name will pop up by your mouse.
  - c. Option #3: Using BOTH option 1 and 2.
4. If all other users have exited out of the customer EXCEPT for one remaining user, then the above notifications or indicators will disappear and no longer be visible.
5. If an edit or change has been made in a customer/collateral change with multiple users in it, there needs to be a notification to the other user(s).
  - a. Option #1: Indicator in the upper center of screen saying "Change was made by XX (User) at 12:37pm. Please Refresh". All other users would need to refresh their screen to see updated customer/collateral canvas?
  - b. Option #2: Have the screen automatically refresh for all other users when a change is made by another user. (Is this possible or realistic?)

## Non-Functional Requirements:

1. Data framework behind the scenes needs to be built that will recognize multiple users and edits/changes at the same time and be able to update the appropriate database real-time. This would allow for indications and timestamps to be possible in the notifications that are displayed to users.
2. Need a way to detect and monitor when a user is in a customer, and when they exit.
  - a. How will the collateral app know that users have left the customer?
    - i. When the close the browser tab they are in?
    - ii. Maybe an "X" button to manually close a customer?

## Screenshots of "Potential" functionality: (NOTE: These screenshots are for example only and could change based on decisions made during development)

Possible screen mock-up of indicators for multiple users in a customer at the same time:



Possible screen mock-up of a notification when another user in the same customer has made changes:

