SUMMARY OF REQUIREMENTS
We are looking for a system to replace our existing, slow system to:

1) Input/Import orders from our website and track orders and leads
2) Keep track of due dates for orders
3) Keep all of our clients' contact info
4) Keep track of dates (show the Order in different stages or phases based upon dates), our phases are:
    - appointment date (manually entered by us)
    - appointment-date-has-passed-but-plans-have-not-been-marked-delivered **(auto-generated date)** which has to be easily filterable/groupable so team knows it is time to finalize the plans)
    - plans are completed and ready to be QC'ed date
    - plans are finalized date
    - payment has been processed date
    - plans have been sent date
5) Keep our field surveyor's contact information
6) Different internal user access levels and sign ins
7) Send confirmation of order with details to client and send instructions of order to our surveyors
8) Autofeed information into the system from our online order requests (on our website on squarespace)
9) Autofeed orders and leads from the system into Quickbooks online

CAPABILITIES WE CURRENTLY HAVE AND NEED -
Every order gets a unique:
- Invoice Number: Autogenerated Number
- Dropdown list of two items FloorPlanVisuals and FPVimages

<u>Client Info</u>:
This info will carry over to all orders placed for the client (the person in First Name and Last Name fields)
- First Name:
- Last Name
- Company
- Email
- Phone: should be able to handle multiple phone numbers along will allowing for text labels (cell, assistant, samantha, office, etc)
- POC First Name
- POC Last Name
- POC Relationship

- Client Preferences (fed from our order system - overwriteable)
- Referred By (fed from our order system - overwriteable)
- Payment Info: protected field for cc info input (free fill text field)

Property Info:
This info will not carry over to other orders for this client but is only each order specific.
- Address
- City
- State
- Zip
- Approx Total Sq Ft: dropdown list which will trigger a related cost

Survey Info:
- Number of Units Surveying: dropdown 1, 2, 3, 4, custom (text field)

  If More than 1:
    - Number of Units in Building/Complex
    - Surveying entire building/property or select units: dropdown with those two options
    - Number of Non-Residential Units Surveying
    - Total Sq Ft of Non-Residential Units: dropdown list which will trigger a related cost
    - Number of Residential Units Surveying
    - Approx Sq Ft of Each Residential Unit Surveying: dropdown list which will trigger a related cost per unit

Surveyor Instructions:
- unit access information
- additional survey instructions
- time allocation

- Building Type: dropdown with single-family, multi-family, commercial, commercial/residential mix, industrial/warehouse only (this will also be combined with sq ft fields to trigger cost of plans)

Appointment Info:
- Order Date: should be defaulted to today but should have a calendar to select dates from
- Appointment Date: calendar dropdown to select a date
- Appointment Time: Manual input
- Surveyor Name: dropdown list containing our current surveyors names for selection
- 2nd Appointment Date: field should be minimized, if anything is input into this field, this field should supercede the above original appointment date when it comes to notifications to parties involved (surveyor, client, etc).
- 2nd Appointment Time: same preferences as for 2nd appt date
- Surveyor: dropdown and same preferences as for 2nd appt date

<u>Cost Info</u>:

- Cost Field: this will be the cost of the floor plans and will be autocalculated based on square footage fields
- Extra Services: this will be autocalculated and will be the total cost of the Add-on services selected (such as square footage calculation, Furniture, etc).
- *Two blank fields:* the first blank field is a description field (I will enter text into here, such as - 'travel' or 'custom services' - make this field long enough to write a sentence if i need to) and right next to the description field will be the second blank field which will allow me to enter a monetary figure (including pennies - $0000.00).
- *One more line with two blank fields*, same as described above
- Total Due: this will add up the totals from Cost, Extra Services and from the blank fields.

<u>Expenses</u>:

All fields should be hidden and appear only when maximized or triggered.

- Two blank fields: the first blank field is a description field (I will enter text into here, such as - 'travel costs' or 'gas used' - make this field long enough to write a sentence if i need to) and right next to the description field will be the second blank field which will allow me to enter a monetary figure (including pennies - $0000.00).
- One more line of two blank fields, the same as described above.
- Total Expenses: this field will add up the totals from the two above Expenses fields
- Adjusted Total: it will subtract the field Total Expenses from Total Due. Make this field editable.

<u>Order Info</u>:

These will be checkbox items but will have a cost box next to each and some will have a third box for textual input as well. Each item should have an optional checkbox or some other way to notate that add-on/preference will carry over to all future orders for the client. When checked, the items will also trigger an associated cost that will appear in the cost box. Should be noted as For all Orders or maybe two boxes that say For this order only and For all Orders.

- Gross Sq Ft Calculation Add-on
- Per Unit Sq Ft Calculation Add-on - for Commercial
- Exterior Add-on
- Site Plan: this will have the cost box but will also
  If selected:
    - Lot Features: big text box allowing about 3 lines of text
- Pool: desirable if when checked will feed cost into Site Plan/exterior cost box (whichever is checked off)
- Sports Court: desirable if when checked will feed cost into Site Plan cost box/exterior cost box (whichever is checked off)
- Waterfront: desirable if when checked will feed cost into Site Plan cost box/exterior cost box (whichever is checked off)
- Furniture Add-on

- Travel
- Sq Ft Take Off Only
- As-Builts - room dimensions, door/window widths&heights, scaled to ¼” or ⅛” on arch sheet size: it should include all that text
- 2D b&w Exterior Elevation Drawings Quantity 4 (one building)
- 2D b&w Exterior Elevation Drawings Quantity for other than 4: text box
- Building Sections
- Roof Plan
- Interior Elevation Drawings: big text box allowing up to 2 lines of text
- CAD File Release
- No Add-ons Needed: this will be a checkmark like the rest but won’t need cost or text box. It will still need the option to carry this preference over to all orders for the client.

<u>Post-Appointment</u>:
- Delivery Date: calendar
- Invoice Date: calendar
- Actual Total Sq Ft: manual input

Show only when triggered or for certain logins:
- Paid: Yes/No dropdown
- Date Paid: calendar

- Payment Method: dropdown with credit card (default), check, paypal, other
- Payment Notes: Up to 5 lines of text
- Last Four of CC Used:
- Amount Paid
- Allocated Time: will feed into surveyor confirmation
- In and Out Times:
- Amount Pd to Surveyor
- Surveyor Paid: Yes or No dropdown

- Important Comments: Up to 7 lines of text

<u>Designer Fields</u>:
- Due Date: calendar date
- Designer: It will be a dropdown field just like surveyors (please provide the ability for us to add new designers to this dropdown list.
- PA Completion Date: calendar date
- Revision Request Date
- Revision Completion Date
- Revision Delivery Date
- Project Notes: up to 5 lines of text

REPORTING

Our current system has the following color coding to represent status or phase of an order, I prefer this be available on our dashboard or by searching for a particular phase.

1. New order (when new order date has been generated)
2. Survey Date
3. DT Work Date (When the Appointment date has come/passed)
4. DT Completion Date
5. When Invoice Date is filled in
6. When Got Paid becomes Yes
7. When Revision Request Date is filled in
8. When Revision Completion Date is filled in
9. When the Revision Delivery Date is filled in

CAPABILITIES POSSIBLY NOT DESCRIBED ABOVE

- Entering new orders (can add a new client within a new order if the order is for a new client)
- Add new surveyors and their contact info and edit existing ones
- Adding new clients and their contact info and edit existing ones
- Adding/Revising/Deleting pricing brackets
- Search within all fields (for a particular order or all order that fall within certain criteria - basically a report feature)
- Report to view all surveyors' contact info
- Reporting
- Allow pennies (doesn't round)
- Sort, filter and group information utilizing any/all fields
- calculate total $$ per month or per filter/sort
- calculate total number of orders per month or per filter/sort
- Autogenerated emails with order details including pricing to clients but first allow review and editing of autocompiled info before sending
- Autogenerated emails with appt details including time allocations to surveyors but first allow review and editing of autocompiled info before sending
- Downloading for archiving system
- Allocation fields need to be able to contain two decimal places (2.25hrs)
- Connecting the system to our website order page (we use squarespace)

<u>Some of the Capabilities Explained:</u>
Capability: New Order
New Order - this will be the most prominent (centered, bolded or a bigger button, etc, some way to distinguish this feature). Selecting this feature will show the same fields and options as currently shown under New Order.

Capability: Search
Search - will be 2nd most used feature. Selecting this feature will allow searching among any of the fields:

Capability: Outstanding Invoices
This will be a report that shows only outstanding invoices and will be used extensively by our bookkeeper to make sure there are no outstanding invoices since the beginning of time. (Basically Invoice date contains a date that is not 00000s and Got Paid is No). **Our preference is that this system links with Quickbooks.**

Capability: New Surveyor
New Surveyor should be a very small button/link, etc, since adding a new surveyor occurs only 1-2 times a month. Selecting this feature will show the same fields and options as currently shown in Add Surveyor.

Capability: Payroll
There will also need to be a Payroll button. Only our HR person will have access to this capability/button (along with the above capabilities). This will show orders for Appointment Dates that occurred within last 25 days and will show the below fields only:

Property Address
Appointment Date
Square Footage Bracket
Comments
Private Comments
Surveyor First Name
Surveyor Last Name
Surveyor Paid
Amount Paid Surveyor

DESIRED ITEMS BUT NOT MANDATORY IF NOT POSSIBLE

- Auto-paystubs. Just like the confirmation emails are autofilled, can I provide the paystub template that I have (which contains a table with rows for line items) and some or all of the fields be autofilled using fields from the DB?
- Auto-invoicing. Can fields autofill QB invoices?
- Can notification emails be autogenerated to specified addresses that are triggered when a new order is entered or when data is updated in certain fields and 'saved' in an order?

Leads
Tracking of new leads, which contain the same fields as entering new orders, except:
- The $$ fields from the new lead cannot to be counted into the total monthly tally of revenue (since it is a lead only and the Lead $$ field will only contain a price QUOTE and won't be revenue for us).

- The $$ field from the new lead cannot be counted in the total number of orders tally since again it is only a lead and not an order.
- The identifier will be Lead rather than Order so that we can use reporting functionality