**Back End**

**Notes:**

* All the dates will be using the format: yyyy/mm/dd
* Time format will be 24 hours (hh:mm)
* Time zone will always be Eastern Standard Time
* The orders will be linked to the user through the registered account/email or the email address provided while placing the order?
* Need to decide how to show orders with Explanation Reports ordered as a combo.

**Tabs:**

* GCMS Basic/Documents
* GCMS Advanced Plus
* CBSA Notes
* CSIS Notes
* MyImmiTracker
* Explanation Reports

**Database Fields:**

* **GCMS Basic/Documents**
* Applicant Last Name
* Applicant First Name
* Order Type
* Applicant DOB
* Application Number
* Email Address
* Spouse Last Name
* Spouse First Name
* Spouse DOB
* Add Comments *(Should mention who added the comment with time/date and what the comment was)*
* Order Date *(Non-Editable)*
* Payment Gateway
* Notes Applied On *(Non-Editable)*
* ATIP Request Number
* Current Status
* Completion Date *(Non-Editable)*
* Days Left/Taken *(Based on status, if Notes Applied, then Days Left. If Completed, then Days Taken)*
* Notes Applied By *(Non-Editable)*
* Marked as Completed By *(Non-Editable)*
* View Log *(Non-Editable) (This will have a detailed log with date and time stamps for all the status messages that were selected for this order)*
* **GCMS Advanced Plus**
* Applicant Last Name
* Applicant First Name
* Order Type
* Applicant DOB
* Application Number
* Email Address
* Spouse Last Name
* Spouse First Name
* Spouse DOB
* Add Comments *(Should mention who added the comment with time/date and what the comment was)*
* Order Date *(Non-Editable)*
* Payment Gateway
* Notes Applied On *(Non-Editable)*
* Notes Applied By *(Non-Editable)*
* Basic
  + ATIP Request Number
  + Current Status
  + Completion Date *(Non-Editable)*
  + Days Left/Taken *(Based on status, if Notes Applied, then Days Left. If Completed, then Days Taken)*
  + Marked as Completed By *(Non-Editable)*
* Documents
  + ATIP Request Number
  + Current Status
  + Completion Date *(Non-Editable)*
  + Days Left/Taken *(Based on status, if Notes Applied, then Days Left. If Completed, then Days Taken)*
  + Marked as Completed By *(Non-Editable)*
* View Log *(Non-Editable) (This will have a detailed log with date and time stamps for all the status messages that were selected for this order)*
* **CBSA Notes/CSIS Notes**
* Applicant Last Name
* Applicant First Name
* Order Type
* Applicant DOB
* UCI Number
* Application Number
* Email Address
* Spouse Last Name
* Spouse First Name
* Spouse DOB
* Add Comments *(Should mention who added the comment with time/date and what the comment was)*
* Order Date *(Non-Editable)*
* Payment Gateway
* Notes Applied On *(Non-Editable)*
* ATIP Request Number
* Current Status
* Completion Date *(Non-Editable)*
* Days Left/Taken *(Based on status, if Notes Applied, then Days Left. If Completed, then Days Taken)*
* Notes Applied By *(Non-Editable)*
* Marked as Completed By *(Non-Editable)*
* View Log *(Non-Editable) (This will have a detailed log with date and time stamps for all the status messages that were selected for this order)*
* **MyImmiTracker**
* Applicant Last Name
* Applicant First Name
* Order Type
* Applicant DOB
* Application Number
* Email Address
* Spouse Last Name
* Spouse First Name
* Spouse DOB
* Add Comments *(Should mention who added the comment with time/date and what the comment was)*
* Order Date *(Non-Editable)*
* Order Tracking *(Link from MyImmiTracker website - will be a hyperlink)*
* GCMS Applied On *(Non-Editable)*
* ATIP Request Number
* Current Status
* Completion Date *(Non-Editable)*
* Days Left/Taken *(Based on status, if Notes Applied, then Days Left. If Completed, then Days Taken)*
* Notes Applied By *(Non-Editable)*
* Marked as Completed By *(Non-Editable)*
* Payment Status *(Drop down with options: Pending, Billed, Received, Disputed)*
* View Log *(Non-Editable) (This will have a detailed log with date and time stamps for all the status messages that were selected for this order)*

**Main Dashboard**

**Database Table Fields:** *(Details visible on the database table, dashboard of backend)*

* **GCMS Basic/Documents**
* Sr. No.
* Actions: View and Edit
* Last Name
* First Name
* Order Type
* DOB
* Application Number
* Email Address
* Current Status
* ATIP Request Number
* Order Date
* Notes Applied On
* Days Left/Taken
* Completion Date
* Payment Gateway
* Applied By
* Completed By
* **CBSA/CSIS Notes**
* Sr. No.
* Actions: View and Edit
* Last Name
* First Name
* Order Type
* DOB
* UCI Number
* Application Number
* Email Address
* Current Status
* ATIP Request Number
* Order Date
* Notes Applied On
* Days Left/Taken
* Completion Date
* Payment Gateway
* Applied By
* Completed By

**MyImmiTracker**

* Sr. No.
* Actions: View and Edit
* Last Name
* First Name
* DOB
* Application Number
* Email Address
* Current Status
* ATIP Request Number
* Order Date
* Notes Applied On
* Days Left/Taken
* Completion Date
* Payment Status
* Applied By
* Completed By
* **GCMS Advanced Plus**
* Sr. No.
* Actions: View and Edit
* Last Name
* First Name
* Order Type
* DOB
* Application Number
* Email Address
* Current Status
* ATIP Request Number
* Order Date
* Notes Applied On
* Days Left/Taken
* Completion Date
* Payment Gateway
* Applied By
* Completed By

**Sorting and Filter Options:**

* All order month-wise (multiple selection if possible)
* Sort order fields in ascending/descending order based on Days Left/Taken, Completion Date, Applied Date, Applied By, Completed By
* Filter based on Current Status, Payment Status and their combination
* Search entire database based on the entered keywords and show entries having those keywords

**Order Status List:** (For GCMS Basic/Documents/Advanced Plus/CBSA Notes/CSIS Notes/MyImmmiTracker) *(Each status will be color coded)*

* **Processing Order :0** - (Automatic) *(Initial Order Status. Send email with consent form and instructions)*
* **Awaiting Consent :1000**- (Automatic) *(If Processing Order exceeds 72 hours. Send reminder email for consent form)*
* **Notes Applied :2000** - (Automatic) *(Once the order is processed and tracking number is entered. The Days Left counter starts. Send email with confirmation and tracking number)*
* **Completed:5000**- (Manual) *(When the notes are sent to the customer. Send email with customer satisfaction survey)*
* **Notes Delayed: Extension Request:3000** - (Manual) *(When a notice of extension is received. Send email with details to customer)*
* **Notes Delayed: Overdue :3010** - (Automatic) *(When the counter of days left becomes -1. Send an email with details to customer)*
* **On Hold: Additional Request :3020** - (Manual) *(When additional documents are requested)*
* **Notes Delayed: Additional Request:3030** - (Manual) *(This will become visible when On Hold: Additional Request is set as status. The Days Left counter will start again)*
* **Cancelled:4004** - (Manual) *(When order is cancelled without refund)*
* **Refunded:4003 -** (Manual) *(When order is cancelled with refund)*
* **Explanation Report: Pending:3040** - (Automatic) *(Not visible to user. When the order with Explanation Report is marked as Completed) (Need to figure out how to implement this)*
* **Explanation Report: Completed :3050**- (Manual) *(Not visible to user. When the Explanation Report is sent to the customer) (Need to figure out how to implement this)*

**Order Status List:** (For only Explanation Report orders)

* **Processing** - (Automatic) *(When the order for only the Explanation Report is placed)*
* **Completed** - (Manual) *(When the Explanation Report is sent to the customer)*

**Days Left Counter Start:** *(These will be color coded as well)*

* GCMS Notes Basic/Documents/Advanced Plus/MyImmiTracker: 35 Days
* CBSA Notes/CSIS Notes: 45 Days
* Color coding:
  + Green: Till 0 Days
  + Red: After -1 Days

**Automated Emails**

**List of Automated Emails:** (The admin/employee should have option to edit the content of each email if required) (The content for the emails are provided in the section)

* When Order is Placed
  + Consent 1 - For GCMS Basic/Documents/Advanced Plus/MyImmiTracker
  + Consent 2 - For CBSA Notes
  + Consent 3 - For CSIS Notes
* When Status Changes to Notes Applied (Tracking Number is updated)
  + Tracking 1 - For GCMS Basic/Documents/MyImmiTracker
  + Tracking 2 - For GCMS Advanced Plus
  + Tracking 3 - For CBSA Notes
  + Tracking 4 - For CSIS Notes
* When Status Changes to Completed
  + Complete 1 - For all orders (Generic email)
* When Status Changes to Awaiting Consent
  + Consent 1 - For GCMS Basic/Documents/Advanced Plus/MyImmiTracker
  + Consent 2 - For CBSA Notes
  + Consent 3 - For CSIS Notes
* When Status Changes to Notes Delayed: Extension Request
  + Extension 1 - For GCMS Basic/Documents/MyImmiTracker
* When Status Changes to Notes Delayed: Overdue
  + Overdue 1 - For all orders (Generic email)
* When Status Changes to Notes Delayed: Additional Request
  + Additional 1 - For all orders (Generic email)
* When Status Changes to Cancelled or Refunded
  + Cancel 1 - For all orders (Generic email)