We need a client/tech order management application written in php and easily configurable and installable in any server.  
  
We need to handle Service orders for jobs received from our clients and or customers. Clients are usually small fitness stores that may have more than one location, that offer our service at the point of sell. COD customers are those who find us online or elsewhere.

Client or customer request a job such as delivery and assembly of fitness equipment, out-door patio furniture, basketball goals, furniture and other ready to assemble items or repairs.

An administrator assigns job to specific tech in the national coverage area and the technician modifies service status to the point of completion.  
  
  
Front end  
- user can choose language  
- user can login  
- check service / job status  
- leave a message for a specific job  
- Technician’s should be able to change status of a job to : Attempted ,Contact 1,2 and 3, scheduled for certain date, in-progress\*, job completed\*  
- all drop down lists (such as service status) must be configurable by admin  
- Enter an order via login or via email to be entered manually by admins  
- See weekly pay and pay amount per job (not customer paid)  
  
In admin view you must be able to:   
- add clients  
- add job  
- add technicians  
- add admins  
- search database using any field  
- filter jobs by tech, state, client  
  
  
Other Notes :  
- Must be given the ability to export data for statistical reasons  
- The script must have clear installation instructions  
- The script must be able to install easily in any server and run on cpanel/whm with root access.  
- For any status change the client or technician is informed via e-mail to login in the system and take action.

Client Message:

Here is some screen shots of a system that works quite well. I personally don’t like the look; however it does work and has got a lot of attention in the industry here in America. My system does NOT need all the features this one has. I would rather have less features and look more modern and simple for the tech, customer and manager to use.

1. **What color scheme you need for this application?**

**Ans: Please look at our site, developed by myself, look at portals page also, since box-ware would be the brand for the software.** [**www.oo-tb.com**](http://www.oo-tb.com)

**2. Do you need this Application in different languages? If yes than definitely it will take more time.**

**Ans: Not important right now.**

**3. Will Users are Technicians, Admin and Customers and clients? Or you don’t need Customer Client Panel and give them access to the system?**

**Ans: Only technician and Administrators.**

**4. Will you make this Application for in house use?**

**Ans: As well as techs that updates the job status.**

**5. What are the Information you need to store against a Customer and Client?**

**Ans: Client and customer can be the same. Client will be a retail store or manufacture but still a customer could be an individual who call directly. A client will submit a job to us for the customer (end user). Please review the website www.oo-tb.com and let’s come back to this question.**

**6. Some time Customer will come to you for Repairing and you will Repair the equipments. So to store all the information’s about the Repairing you need to store the information of the parts which has been changed and the price etc right?**

**Ans: Correct, yet there WILL NOT be any inventory.**

**7. Will you charge any Type of Tax (Service Tax) etc to Customers and Clients?**

**Ans: No, except in some cases we may charge more if the product has to be carried up stairs or moved.**

**8. Who will assign task to a Technician? Can a Technician refuse to accept the Task? If yes in which case he will be able to refuse the task?**

**Ans: Good question! The goal one day will be jobs auto assigned based on zip codes, for the 1st version it is acceptable for the admins (managers) to assign jobs to techs. Rarely will a tech refuse a job, more than often we will reassign if it does not get scheduled or customer contacted within 48 hours.**

**9. Do you need a panel through which you can see the Technicians and their Respective Work for the time?**

**Ans: Time tracking is not important; jobs status is important, examples 1. Arrive at customer/ 2. Job Completed. It would be great at some version to have a mobile application that would allow for customer signature via android or IOS**

**10. Do you need to keep track of Technicians per Day earning for the company?**

**Ans: Per Job, based on certain techs getting paid certain amounts for certain products, one tech might make 50 dollars for a repair or install where another makes 60 as an example.**

**11. What are the Different Reports you need in the System?**

**Ans: Basic, will circle back around to this question.**

**12. Will you need Job Management Facility to be integrated in the system? Like when a client or customer asks for repair or installations then the Technicians may require specific instruments to accomplish the task. In that case he will send a requisition to specific person to arrange the same and the respective person will issue the instrument. Will you need this kind of processes in the system?**

**Ans: No**   
  
**13. Do you need Credit Reminder in your system?**

**Ans: Not sure**

**14. Do you need Pending Job Reminder in your system?**

**Ans: on-hold jobs as a filter is fine**

**15. Do you need Inventory Management Process in this system? If yes what are the information you need to store against Different parts?**

**Ans: No**

**16. Will you make Bill for the Customer and client through this system?**

**Ans: Yes**

**17. Do you need AMC contract management process in this system? If yes what will be the Dataflow you need for the same?**

**Ans: Not now, perhaps in the future we will offer fitness equipment maintenance programs that would be the only type contract.**   
  
**18. When an order will come up from the Customer or Client you need to Place it in the system and that time you need to input many information against the Work Order. I would like to know what are the different information you need to gather for the same?**

**Ans: See attached work order, also keep in mind that we use authorize.net as a payment gateway. This could come in version 2 and is not critical at this point.**   
  
Things to consider:

This business stems from two partners who have a substantial amount of resources nationally. We have both built similar companies for corporations and at this point have won two small but national startup clients that provide great leverage for gaining more business pending system (https://box-ware.com) completion. At the time we have a "operational system" we will be able too fund ongoing enhancements and growth.