**Out of the Box**

**(Order Management Software)**

**1. Scope of the project:**

This project is basically order management software developed in PHP and MySQL as backend. The order management deals with the service orders posted by clients or customers (COD) for specific purposes. These orders are being assigned to some technicians by admin users to carry forward. Clients are usually small business stores that offer service orders at the point of sell. COD customers are those who offer service orders from anywhere. The technicians are registered users who can modify service status at the point of completion .The software is developed in such a way that it can track each and every step of the order from the stage of posting to report release. The whole functionality of the software is based on the lifecycle of orders.

**2. Technical Details:**

The basic language is PHP and MySql backend for data storage. Other scripting languages like **AJAX, JQuery, JavaScript** are used in this project for validation, auto suggestion, avoid page refreshing etc. Some plug-in like Fusion Charts, mpdf, Fancy Box, Accordion, Date Picker, CKEditor are used in this project for showing statistical data in dashboard, popup modal windows, maps, calendar, WYSIWYG editor , event calendar etc.

**3. Payment Gateway Integration:**

**Authorized.net** is the payment gateway integration used in this project. For client payments and customer payments this PG is used. We have used the **Advanced Integration Method (AIM)** which is Authrized.Net’s recommended connection method and offers the most secure and flexible integration for all types of transactions.

**4. Important Modules:**

* Dashboard
* Open Board (Service Call)
* Dispatch Board (Service Call)
* Client Management
* Technician Management
* User Management
* Email Template Management
* Payments (Client Billings and Technician Payouts)
* Reports (Both Payment Reports and Job Reports)
* Work Calendar (Monthly Works )
* Settings (Master Module)

These above are the modules used in the project to manage whole process of the order management. Besides this there is also client/customer login area and technician login area where separate modules are present for them.

**For client’s login area:**

* Dashboard
* Account Management
* Open Board (Service Call)
* Dispatch Board (Service Call)
* Payments (Including all billings)
* Reports (Both payment and job reports)

**For Technician’s login area:**

* Dashboard
* Account management
* Job Board (Service Call)
* Work calendar (Monthly Works)
* Payments (all payouts)
* Reports (Both payment and Job reports)

**5. Major business Logic involved in the system**

The main business logic behind the system is job post and after approval the posted job is assigned to a technician by admin user .The technician will complete the job and update the status of the job. After completion of job the bill will arise against clients/customers. Technicians also get their payments. At last the reports will be generated for different type of users (admin, clients/customers and technicians) in their respective login areas.

**Admin:**

* Admin can manage accounts, clients, technicians and major settings necessary for the system.
* Different email templates used in the system can be managed by admin user.
* Service prices for different services basing on products and work types can be added and modified time to time.
* On the special request of COD (Cash on deliver) customer, admin can add /post jobs in the system.
* To approve jobs posted by different clients there is option in the system. So the jobs can be authenticated and made ready for schedule.
* For schedule /assign jobs to a particular technician facility is given in open job board.
* If necessary admin can assign multiple jobs to a single technician to start work.
* Admin user has rights to view/ modify the job posted by client or himself at any time and any condition of the work order.
* The system has facility to notify the work status updated by technician in dispatch board which is an important module of the system.
* Admin user can raise bills against the clients and COD customers after completion of work order.
* Technician payouts can be easily handled by the system in technician payments section.
* All the payment history made by different clients and cod customers can be viewed in the system.
* Reports are the important section of the system. Different reports like client’s details, technician details, work order details, technician work status details, open jobs, scheduled jobs and completed jobs can be generated from the system.
* The payment related reports like client billing details, cod billing details, technician payments details, all job payments, and service wise billings can be generated from the system.
* All the reports can be downloaded into different formants like .doc, .pdf, .xls and print mode.
* The most important module of admin is dashboard. Where admin user can visualize the details of statistical data and can be migrated to required modules. Dash board contains the latest open jobs, scheduled jobs(Assigned jobs), billable jobs, pending bills(to tech), weekly start up works(current week), pie chart of whole work status, Best technicians and Best clients and service wise work order details.
* The major functionality of open and dispatched board is the grouping of jobs according to delivery state (customer state), expand and collapse of records.

**Clients:**

* The system gives the facility to each client to post new jobs. After login clients add/post their required jobs for different customers and leave for admin approval.
* They can manage the jobs posted by viewing/editing/deleting from their open boards.
* Once the job is assigned by the admin user, client can’t do any operation like edit and delete but can view the job and work status.
* In clients payment section all the billable work orders will be displayed where client can make online payment by putting the credit card details.
* Then after client can view the payment history made by him/her at any time.
* Reports are also available for clients. They can down load total job reports and payment reports from the system.
* All the clients’ reports can be saved in .doc, .pdf, .xls or print format.
* Dashboard facility is also given for clients, where client can view the gist of his/her own jobs with some statistical data of the system.

**Technicians:**

* Login facility is available for all technicians .Once the technician is created by admin user one email notification will fire to that technician with login credentials.
* Technicians have their own job board where technician can view the assigned jobs and if required then rescheduled the assigned jobs.
* After work start the technician can update the work status in the system by clicking the option present in job board.
* There technician can input the work status, start date, arrival time, departure time with some notes. This status with time table will be reflected in all section of all users (Both admin and clients).
* Technicians can view the payments history made against him from the system.
* Reports can be generated by technicians. Technicians can download reports like total jobs, total payments from the system.
* All the report formats can be in .doc, .pdf, .xls and print mode.
* Dashboard facility is also given for technicians where they can view the gist of their work orders, pending bills, present week work start graph and some statistical data from system.

**Systems generated notifications:**

* Auto generated email will send to admin if the job is not assigned within certain period of time (defined by admin).
* Auto generated email will fire to technicians if the scheduled job is not started in proper time. Simultaneously one email will go to admin to reschedule the assigned work.
* One system generated email will fire to both technician and customer one day before the work start to aware about the work.
* Besides this system generated emails all other emails will fire while operating certain actions in the system.

**The link of the project in testing server:**

<http://www.bletprojects.com/outbox>

Login credentials are:

User ID: [info@outbox.com](mailto:info@outbox.com)

Password: info123