**Feedback June 22, 2013**

Looking good.  
  
The dashboard concept is great!, important information here would be:  
  
Jobs Open (means unscheduled)  
Jobs Dispatched (means being run today)  
Jobs Scheduled (means all jobs scheduled not including today's jobs)

Answer: Ok, that means we have three job statuses. One Open, another Dispatched and last Scheduled.

In al reality, jobs scheduled and dispatched are still both scheduled. Important that at least the jobs in dispatch (running that day) are at least colored or tagged in a way that they are jobs being monitored for updates. Updates means, the tech is putting the job in progress or arriving at customers home and completing the job. I will leave it up to your team to come up with something creative based on these needs. Feel frr to contact me anytime. Important is around 7PM the day before a job is being scheduled, the technician gets an email reminding him of the service (very important)

The type of jobs is not important but if you can incorporate it  
without taking up or using great space on the dash board is good.

Once clicking on the Jobs board, the critical information will be to  
filter the jobs based on:

Answer: Ok, that means clicking on the specific job from dash board that should be filtered and displayed in separate page.

No. Open jobs will all open unless filtered by a time range. Once the jobs are open (either scheduled or unscheduled/open) the ability to use a drop down filter to see them in categories by tech, state, etc.

There should be two job boards:  
  
Open jobs which is too be scheduled  
Jobs already scheduled/

Query: ok, that means we will put two separate job boards in our dash board. Presently we have kept one for Current Jobs and another for Expert Technicians. So we have to replace these and place two boards, one for Open Jobs and another for Scheduled jobs. Please provide your esteem suggestion on this.

I’m not sure where expert technician fits in for the main dashboard. The technician’s login, should only show the jobs that he personaly has assigned to him. With the ability to only does a few things: Schedule it and update it to the point of completing it. Now eventually it will be needed to allow one tech to control or place a job assigned to him to another tech that is under him. The part about a tech scheduling a assigned job to another can come later if need be.

Filters are very important so that we can see graphically the jobs based on:  
  
State, Tech, Client, Job Type

Answer: We will provide all criteria of search in Manage jobs page after successfully adding and scheduled.

With more than 300 techs, it is VERY important to be able to find all the jobs assigned to a specific tech. When we have district manager or area mangers, they will want to see all jobs that are in specific states, type , etc.

A client can be a store or fitness center with more than one location  
or it could be a COD customer that called directly and is anywhere in  
the country.  
  
A client has the following fields:  
Name:  
Address:  
Zip:  
City:  
State:  
Contact name:  
Phone:  
Fax:  
Email:  
Name on Credit Card, : Number: Exp, Month, Year, CVC  
Locations + Address separate data base but attached.

Answer: We will move forward with these fields for client/COD Customer.

But one more thing is **“Locations + Address separate databases but attached”**. We could not get this field explanation clearly. If it is true in our sense we have to keep two fields for Location and address. What is your esteem suggestion on this?

Let’s circle back around to this later since it is not critical at this time.

For about credit card information like Number, Exp Month, Year and CVC number. Is it necessary to keep these fields in client add form? We think for security reason this informations are not necessary in the same add form. This information need to be place in the Payment process stage. What is your logical thinking on this?

Ok, will leave that to your team.

A tech (user with different site privilege, can only update jobs from)  
has the following fields:  
First Name  
Middle Name  
Last Name  
Address  
City  
Zip  
State  
Contact Phone  
Alt Phone  
Email  
Make Check Payable To:  
SSN#  
Date of birth  
Company Name  
FEIN#  
Status = Active - inactive - Benched  
Login level - In the future may differ, i.e ability to contra other  
techs scheduling  
Type Vehicle - Picture  
Tech Picture  
Drivers License Number  
Pay Grade = A, B, C or D

Answer: We will move forward with these fields above for Technicians add form. This is OK as per your suggestion.

Yes

Pay grades:  
  
various products that are assembled:  
  
This has to do with a few modules, i.e product pricing and tech payout  
  
Keep in mind, different customer may have different discounts and  
different tech may have different payout adjustable  
  
Repairs will sometimes require 2 or three trip and in-ground basket  
ball goals (hoops will always require two trips), setting the pole and  
standing it up after it dries. tech gets paid when the job is  
complete, rarely will two different tech do the same job but it could  
happen in isolated situations. Example, a tech start a job but unable  
to finish the install.

Query: We have to keep product pricing (Job pricing) on client/customer basis and also Technicians Payments individually. Are we right with our thinking? Please suggest.

Yes, but for reporting purpose it’s needed to associate for profit/vs loss

Tech having the ability to schedule jobs via browser and update them  
via field software or mobile application is the goal.

Answer: Ok, Technicians can login the system and update their job status periodically in the system.What is your thinking on our thoughts.

Techs will ALWAYS be updating jobs while out in the field using androids and iphones. Keep that in mind

Dabasis, if you could provide a display of the dispatch board, how it  
will filter or show scheduled jobs, we would be comfortable with  
moving to miles stone 2 and forward. This is the biggest concern we  
have of the software, as it is a critical process in what we do.

Answer: We will provide filter option in manage job page and from dashboard the selected job will be displayed.What is your suggestion on this?

Sounds good! Be creative as always while keeping it easy for the user/manger

**Apart from the above query/explanation one more query from the requirement. Please see below**

Query: One more query about the Post Oder form fields. Can you please specify what controls/fields would be in the Post Job fields in details? Or we can keep all the fields same as the image (order form image) you had provided previously. Please suggest.

Will send the updated form

Email june 24, 2013

Please work to allow us see how the scheduling board will look. This  
is one of our most concerned interested areas.

**Email July 2, 2013**

Hello debasis, see attached with the understanding that we are not trying to duplicate that system. The tab that says post a job should be simply be "service calls" and have drop downs under them allowing to find open board, dispatch board etc.   
  
I don't particular care for the form the way your team has it now, it looks more like a paper format rather than a system. I am sure it will come together in the end.   
To answer your questions.   
Query1. Auto populate is great wherever it can be used. Yes   
  
Query2 You got it! Yes  
  
Creating a new order in another system and then canceling it.

**Email July 3, 2013**

Hello Debasis, There is some facts necessary to know prior to allowing you access into the other system.. We can better talk about these via Skype when you get this. Meanwhile we are working on the other queries.

**Email July 8, 2013**

NICE! Now things are truly moving forward!  
,  
looking good.  
Form is good enough.  
  
Development  
[www.oo-thebox.com](http://www.oo-thebox.com/)

---------------------------------------------------------------------------------------------------------------  
Just a few things to keep in mind:  
  
1. Can we make it so we can adjust the columns we want to see in the order we want to see them?  
  
2. Can we make it so we can assign multiple orders to the same tech at the same time? Possibly by highlighting the order or by a check mark and change all items checked. "Similar to how an you can delete multiple e-mails."  
  
3. We would like to know how many orders we can see on one screen without having to click to the next screen. As you seen In Venus you can view every order on one board for that day, week, month.  
  
4. Can we click on the order to view the details? or hoover?  
----------------------------------------------------------------------------------------------------------------------------------------------------------------------  
Also...  
  
We need to see multiple techs on one board. If you need to see Venus again we can do that

**Email July 9, 2013**

On the dash board, we REALLY like the graph showing open vs scheduled jobs. Can you make that optional changeable by also (new jobs vs scheduled jobs by time frame as an example today 7/8-7/8 or 7/4-7/8) and also open jobs vs scheduled jobs by a certain tech or customer. Basically the dashboard being a graph summary of the open and closed board.. NOW THAT WILL BE THE ONE-UP ON VENUS.

**Email July 17, 2013**

Looking great in progress. Have you out any direction towards the time frame as the when the scheduled job will be run and notifications that are made to admin and tech if he has missed the first part of the time window, Keep in mind that we operate on two hour time windows, in other words, if we tell a customer they will be serviced at 10AM, we also let them know that the tech could arrive between 9AM and 11AM regardless of how long the job takes, Some jobs takes longer, Eventually we will have the system learn how long it takes certain techs to do certain jobs just for purpose of better scheduling for that particular tech. Now thats on down the road of coarse. Yet for now it is important that the system is able to schedule not only on days but on times as a reminder. Sure you already know that, just wondering also how you could incorporate that on the dispatch board and possible the dashboard. As an example: Jobs being ran per certain hours, today, this week and by certain techs. Also how many jobs are late to be scheduled on the dash board and colored red on the dispatch board.  
  
WOuld be realy cool of the pie or bar that showes jobs not being serviced on time would allow the mouse hoover to popup the customer information and tech nam phone number.. Now also keep in mind that the tech will have ti make updated as to the progress of the job, in other words, a module that just allows him to scheduled a job and place job in progress meaning arrived at customers and job completed. Eventually we would love to have a specific android and iphone application that allow customer to even provide signature of job competed.

**Email July 19, 2013**

NOT CHANGING DIRECTION AT ALL GUY but I wanted to share something with you. For a while now and untill we are using Box-ware, we have been using an application that I found within my google developer account. One specific thing we like about it, maybe two is the way the dispatch board works. and also how the status board works. I can tell that the dahboard of boxware will replace most or some of what I am about to show you. I am only sharing this with you because if you can take something from it that you like, especially "the google maps api" Any how, it has been a life saver and is getting us through while we have discovered a few things about it that at least look very nice. There is allot of things on i that dost workd very easily without having to enter stuff more than once. ANyways take a look at the following dispatch board and figure on if its possible to make the dashboard of boxware have a small version on how its dispatch board works. This kind of what my confusion was about when we were deciding on making a system like Venus or with time slots. I just thought maybe a variation of both might be helpful for your eye. If not than forget about it. at least take a look please.  
  
<http://www.aceroute.com/login.html>  
  
[dev@oo-thebox.com](mailto:dev@oo-thebox.com)  
  
80xW4r3!

Debasis, will the technicians be able to see jobs only assined to them and update?   Can we allow for client to request a job with thier own user ID & the job be approved by admin/managers?   Is this difficult or already possible.

**Email July 29, 2013**

Keep in mind that there is a slight difference between a client and a customer.  In fact we will refer to customer that contsct us directly as COD (Cash On Delivery) Customer.  A Client provides us customers, most of our work comes from clients such as <http://www.fitnessblowout.com/>  
 anybody who buys equipent from that site, the product gets sent to the custoemr by fitness blowout, then fitness blowout sends us a wokorder to complete the job once it arrives or a repair even

I am OK, with all call in customer being COD Client and we update adress on order each time for now.  Just thinking,  will provide you some detail greater in day or two. Looking damn good though!

**Email July 31, 2013**

Looking good blet! Our pricing is straight forward for now. I am going  
to share with you our basic paysheet to techs. The system will  
obviously need to track receivable vs payables.  
  
Once this is operational and working, we will have a final task  
request before going live.

**Email July 31, 2013**

Keep in mind that when we assign a job to technician, he still has to schedule it. The system must allow assigning job to tech, which sends email notifications to technician telling them job is available. Then allow tech to login to their username to update the job. Selecting more than one job to be assign at a time will be a great feature very soon if not already and a notification be sent from each instance.  
  
Open job means it has to be assigned to technician first, then scheduled by technician and/or admin second. In some cases, the admin may schedule a job for the technician.  
  
I imagine the system will include cron so jobs that system will recognize jobs that are not scheduled within certain amount of time, etc.   
  
It is my hopes that you observe other systems,  
[www.fieldlocate.com/demo](http://www.fieldlocate.com/demo)  
[www.aceroute.com](http://www.aceroute.com/)  
[www.servicebench.com/site/](http://www.servicebench.com/site/)  
including the Venus system to maximize these features.  
  
Arranging columns or moving them around on the open and dispatch board? Notice on Venus, this feature was built for the various managers across the county, so that they can see jobs just in their area and information that is more important. The filter system that you have allows for this, yet it is my hopes that you can be creative in displaying such informations in certain orders and widths.  
  
Keep the jobs on single lines and expandable based on filters set possibly.  
  
Dashboard allows hoover over job to see details in small rounded corner grey box, would be nice.  
  
Security will eventually be an issue (sooner than later), as an example the credentials for technician only does NOT eliminate user from accessing the system as is now.  
As an example: <http://www.bletprojects.com/outbox/email-template?id=2> can still be accessed by user (technician or any other) without email template ability. This is not a priority right now, just be aware that we will eventually need to tighten this up even in a later version is fine.   
  
Blet, the achievable goal within a year is to have this system replicatable as also a service to others such as the above sites I shared. Very soon BoxWare is going to fuel Out Of The Box, then OOTB is going to quickly fuel BoxWare. Ultimately, our own technicians can also use our system in order to manage jobs even from other companies than Out Of The Box. This is very important, we will be the first and only company in America to do something like this, it will, I promise you, make us all, including yourself, very very happy. I and my partner has the contacts and the resource to make Out Of The Box quickly become a multimillion dollar company and have already got a big jump towards it, yet BoxWare is where it is at!! I cant emphasize the big picture of this industry in America. Its all about retail and lazy or (to busy to do themselves) people that wants someone else to do the work. Then its all about the corporations dealing with a company that has modern, state of the art technology & resource. last, its about having the credible sells people to tell them what they need to hear. I am my partner has been 20+ years building the largest company in America, now we as well as the same sells people (some of them) are doing it very quickly for a better core group and for ourselves.  
  
Your team has demonstrated great capability. As a novice developer, I know that it takes compassion and desire in order to get a great system and site, I also know your developer can do whatever we ask him to do, as you have demonstrated.   
  
I am not certain what it is but I and my partner are looking for something to "WOW" or to surprise us, is it possible that your developer can look at the other systems and be creative in making BoxWare a unique experience that can leap us towards the big picture I have just shared with you.

**Email august 07, 2013**

How are things going Blet? I noticed there is a module named States, I am a little confused on what that is for. Is it possible that soon we can place at least a portion of the software on our server? I ask this because we have a important customer that we would like to at least demonstrate to him how to submit an order and the notifications.

**Email August 08, 2013**

I sent the state in html format simply for the state selection to be a drop down list, this way the state entries will have no room for spelling error when entering an order.  
  
Looking good Blet, looking forward to the new looks and hoover. Once we get the accounts receivable and tech payouts operations we should start preparing for go live date. Is is possible that the script will have a install script built with it or will it be necessary to config files during installation. My biggest concern is if the server ever goes down that I will be able to reinstall the software easily with a backed up MySQL DB

**Email August 12, 2013**

Blet I am still not seeing the account receivable and tech pay, this is critical.  
-------------------------------------------------------------------------------------------------------------------------  
Why do you block access every time you request money?. I don't like this Blet, How can this be good business to make a decision on where we are at. This at this point does not set very well with me. I suggest that you get the system unlocked so that myself and partner can see the work completed and also compete the accounts part and tech pay. A system is not system without it.

Blet, its a record of what the job cost that in return is receivables meaning that it will keep a running total of the customers amount owed. and also the technician payout based on his paygrade per job. This is the part where I say there is slight difference between a client and the end customer. The client would need to be billed for the jobs they provide us not the end customer..  
  
Thanks  
  
Once this is completed I will be happy to release milestone 2. Soon after "give the touch ups in the system" the remaining amount of the project payment.  
-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------  
N problem in the locked system, it just appeared to be the same as the last time you requested a milestone, excuse my wrong perception if so the case. No problem.

**Email August 13, 2013**

Hello Debasis,  
  
We do use Authorize.net and it would be great if a customer could pay the per job or even a weekly total of jobs using this method. we will also receive checks from time to time and the receivable will have to be entered manually. Techs get paid when jobs are completed (we payout on Fridays), unless it is a repair job, they will get paid for the first visit A(diagnostics) and also the second and maybe even a thorud visit in rare cases. On basketball goals, the job requires two trips yet they get paid the full amount when job is complete, so on the first phase (digging hole) they get paid zero. in some rare cases we may have to pay the tech for first phase if some other tech happens to complete the job for him, in that case they both get some money.Different techs make different amount based on the pay grade A,B,C,D.. Ultimately we will need the flexibility to charge a customer anytime we see fit, the important thing is that it keeps a total of what our clients owe us and what we owe the techs for completing the job. The system must track both of those indepently since we may in many cases have to pay the tech before we get paid for the job. For this reason I have been reminding you that we have clients that we work for that provides us end user jobs, we also have end user customers that call us directly that we charge them immediately for the work (COD)  
  
Along with the cron jobs, it is important that when we assign a job to a technician, that he gets a email telling him its assigned to him and also a reminder to schedule the customer if it is not scheduled within 24 hours. He has 7 days to get the job done total, he has 2 days to get the job scheduled. Sounds like you are very well on track, great news!  
  
Flow example 1:   
- retail store sells product and collects money for service of installation  
- retail store submits work to be completed  
- admin looks for tech local to job and assign the job to tech (tech gets notification)  
- tech contacts customer within 2 days and schedules them (otherwise he gets notification)  
- Would be great and important if customer (end user) gets a reminder and tech gets a reminder the day before service. Also if tech get get emailed the work order (paper format) that the customer can sign upon completion.  
- Tech updates the status of the job to the point of completion  
- Tech gets paid on fridays for each job completed per the price agreed when hired A,B,C,D  
- Client gets billed for jobs competed when tech turns in paperwork (eventually we will ant to do some kind of electronic signature on the smart phones, sooner than later.  
- If the end user is a call in (COD) customer- we will have collected the money prior to the tech arriving at the customer by running their credit card via the virtual terminal or providing them a link to pay the invoice.

**Email August 14, 2013**

1. Yes, define any price, as long as we can change it.  
Example: Treadmille Delivey and Assembly, we get paid 125.00, tech gets paid A.85 B.75 C65 D 55  
2. We have not done any delivery onlys yet, we will be soon. Ultimately, creating different services should be ability, if that is a huge request, we can circle back around later on that. If it is a huge request at least create a service called General Service and we will enter the price per job. Doubt we will use it much at all, will be used though.

TO make it easy, COD will be a customer that calls in. COD will be a client which covers all customers that are not given to us by a company (client)  
Getting really excited Debasis. We are in great need of the system

**Email August 16, 2013**

All work order basis, A word consist of one or more pieces to be delivered and installed or installed, or repaired. Each product charges and pays a certain amount. No hourly  
-----------------------------------------------------------------------------------------  
Each service has its own price, example, delivery pays certain amount on most all products unless it is very large and heavy then we would need the flexibility to charge extra or if going upstair we may charge additional., assembly only pays certain amounts based on product type. Combined we have a price for delivery and assembly based on product.  
-------------------------------------------------  
The main thing is having the services table "delivery only", "assembly/installation only", delivery and assembly" and "repair" There will be different products that cost various amounts to install. Having the flexibility to add services would be the ultimate solution.  
-----------------------------------------------  
Looking good Debasis! It's on the right track and almost there!, please try to work somthing out on the adjustable columns in the open and dispatch board.

Very good news, I hope so as well.   Please  work on getting the open and dispatch board with the better view expandable, simular to what Venus was or something that is equivelent..  The problem with now is we have 100s of jobs that are open and will have to scroll way down to search in no certain order.  That is very important.   Also work to get the flow of how a order is entered, such as that which will automatically take you to the next field so that entry is not all over the place. I would like to see a new order entered in a box that overlays the page (Very simular to what the support tab by clicking on the right of this page looks like <http://oo-thebox.com/> )  Make text and lines a llitle smaller (around 12).  We are prepared to pay for all the software immeditely 100% upon completion.  Mid next week would be perfect, our #1 client is expecting to see it runningon Friday while in Las Vegas.

**Email August 17, 2013**

No, COD customers will not submit jobs using the system.

Debasis, is a way you can create some order in which an order is entered? Example, when new order is clicked, it actually prompts the user to enter data in a certain order... I dont care how this is achieved. This is important to have a consistent flow in order entry.

**Email August 20, 2013**

The tabbing will create order for now, can we get the new order page to be a pop-up smaller box with the same properties as the click to see map function? My only thoughts is browser compatibility? As for the expand and collapse, this will be fine as long as long as it is based on filter settings. In other words, the filter settings should allow for selecting a prefered view. Its current setup doesn't really do anything functionally at all, except for collapse a certain amount of jobs unknown in no certain order. I don't know what I am collapsing or expanding. Here is what needs to happen at this point:  
1. the ability to click on a column header "as an example, State.  
2. When clicking on State, it becomes the first column and is collapsed based on states. So if there is 20 orders in 5 different states, there will be 5 collapsed rows, with the title of the rows being various states.  
  
Blet, we are getting down to the final days, your team has plenty of information at this point between our Skype conversations and the dialog made here. I am still seeing some things that doesn't quite jive correctly. I imagine and hope the developers know what they are. As an example, on the dispatch board, the open jobs only show 4 jobs as does the scheduled, it makes that section pretty much unusable  
unless one gets lucky by hoovering over a job and it happens to be one needing looked at. I have not had time to go through the software with a fine tooth comb, and really don't want to, I just want it to be a  
solution that is competitive in the market or "better as you said it will be" Your team has honored my request on these features "in part" I have the feeling that I am being leaned on to explain each and every  
turn, stop and go of this project rather than just getting to the destination. Lets look at this project much like a home, where I originally say, here is 3 other houses that I like very much, I want the inside to look like this one and the outside like, etc. I am not super picky, yet the house has to have all the rooms and the appliance has to be there :) I say this with humility Blet, no other way to say it than what it is. Please have your team go through the software and do things that has "impact, flow and consistency" My request for final touches is just that, I have provided you with several systems that work very good and there is several more form other service companies, they all do the same thing and one of which is favorable, Venus. I ask with great need here, get your team to up the bar on feel, looks and order so that we can start using this software. I am certain if they put their ALL 100% in this for just a couple days, great strides will be made and we can complete this project and all be happy  
  
  
I imagine on the order, all orders, that there will be a section that populates price billable and price payable to tech. Price populates according to clients chosen and tech chosen respectively. It is important that we have the ability to override those prices as their will be times that we make special pricing agreements/adjustments.

Thats quite OK, for now we will go with a standard price on services that is the same for all clients. It may even stay this was as long as we have the ABILITY TO CHANGE PRICE while entering the order. As a  
work around moving forward, we can always create the same service with a different name, as example Treadmill-Fitnessblowout, Delivery-fb, etc. for new or different price agreements that we make with various clients.

**Email August 21, 2013**

Yes, move to the payment module, this works for now just fine  
-------------------------------------------------------------------------------------------  
I have to point out, the states do not match the row titles. There should be 8 jobs under Alabama and 1 job under minnesota. Just a FYI. LOOKS GREAT THOUGH, its one of those small things that makes a huge difference. We depend on certain people in 50 states to get the jobs done nationally across 4 times zones. Being able to track and to see what is going on is the big goal.  
--------------------------------------------------------------------------------------------------  
Also having the states as a "permanent" filter item will make the state filter/dropdown of no use. Another example of something that makes no reason. Please tighten these loose ends up along with the dashboard that only shows 4 jobs both open and scheduled. If there is no creative solution then simply remove the view of jobs from the dispatch board..   
-----------------------------------------------------------------------------------------------------------  
from the dashboard rather than dispatch that is

**Email August 23, 2013**

Good Blet! Thanks!  
----------------------------------------------------------  
On the client billing, it is important that billing can be run against all jobs completed as a total for the client. COD can also be a client but will be billable as individual jobs to the different customers/work orders. Perhaps having some type of color code would be great. If the job is grey it needs contacted, if it is red it is past 48 hours of being contacted, if it is green it is completed if it is blue it has been paid, etc. Just thinking out loud but I think colors will be a great way to know the status of jobs and for status of finances.  
-------------------------------------------------------------  
BLET!! I just found the effect I have been describing. For the boards and other list, this would make us VERY HAPPY. See the attached example video. I am not sure what code this is, maybe css/html5 and Java??  
-------------------------------------------------------------------------------  
I like the css version better, however here is some more simple code that works as well <http://www.danvk.org/wp/dragtable/>  
--------------------------------------------------------------------------------  
I think having the table retain the setting per user will be the goal sooner than later, I figure that will need to be css/java /cookie settings or server side scripting even better  
\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Sudhir sir Responsive table link : <http://www.html5rocks.com/en/tutorials/dnd/basics/>

Responsive and seo friendly table link: <http://www.mobifreaks.com/wp-content/demos/Responsive-and-SEO-Friendly-Data-Tables/>

Responsive Table Link : <http://elvery.net/demo/responsive-tables/>

<http://jebaird.com/demos/dragtable/>

**Email August 26, 2013**

Not this is moving double time! Getting there, thanks!  
-----------------------------------  
Blet, if we decide to run credit card against client for say "all outstanding jobs" at one time, rahter than running the card several times for each job. This will soon be a problem if not already. Do you know any solution to this?

One of our clients, FitnessBlowout has us run the credit card for payment anytime we complete a job, currently we complete about 5 jobs a day for them and will often run the credit card for several jobs at one time. Another client pays us 30 days net using a check, COD customers will also pay credit card, but for the sake of ease, having a general payment page we can update their order as paid manually once paid or run it for them over the phone in most cases. If you know a better solution, I am open to suggestion for the COD/Call in customers.

**Email August 27, 2013**

Blet, I am not sure what detail you may need specifically, but consider the following.  
  
if the system is efficient in Accounts receivable and payables, it will "like any system" keep a running total of clients/customers/techs payables and receivables againsts what is owed and what is paid.   
  
Lets assume the following:  
  
Cient "A" has 10 outstanding jobs that need to be paid.  
Client or Admin can pay against the outstanding amount owed which will apply paid status towards jobs completed starting from 1st job unpaid.  
  
I like the ability to pay per job as well, because that will fit some of our client billings.  
  
Most clients will pay weekly, biweekly or monthly and pay for all unpaid jobs at that time.  
One particalr client "Fitnessblowout.com" has supplied us with a credit card that we run anytime we want to "pending job completed"  
  
So, if client "A" has 10 jobs completed at 100 each "total 1000"  
Client pays "$850"  
Client still owes for for job 10 job and 50 dollars towards job 9.  
  
The client or admin being able to pay towards a certain job is also great and needed as it now seems available.  
  
On a report basis, being able to see the profits/payables against:  
Technician, jobs, clients, type services, etc.  
  
All accounts are paying based on products completed during the job or jobs.  
  
All of our technician gets paid every friday for jobs completed the previous week, regardless of weather we have been paid or not yet.

**Email August 28, 2013**

Work in a search ability in the boards and on the dashboard, the ability to search a job by customer.  
  
my partner however is desiring to see the innovation we discussed on movable columns and filters of the open and dispatch board.  
  
On the openboars that collapses based on states, perhaps that will change with the new style in works. The delivery state is more important than pickup state but in most cases is the same except that usually there will not be a pickup at all.. Being able to choose and drag move columns is the goal.

When creating or editing a job, the ability to assign to tech, itemize the billing cost as products are added and populate tech pay based on his paygrade. The option to override those numbers is important.  
  
imagine you already know that or have plans to integrate the billing into the work order entry.

**Email August 30, 2013**

That will work for now, later I will wish to utilize a css version of that feature, just so you know. The ability to sort is very important as well. While it must still maintain the category by state (delivery to state not pickup state) Was really hoping for something innovative here as well if you can. Basic html will get us by if not.

**Email September 03, 2013**

Hello Debasis, the other solution is more practical than this one. we very much like the states grouped the way they were in categories. I recommend lets revert back that way, we can always circle back around to improve on it later. we can proceed to complete the billing.

How do you expect the software will install, will self install be an option later or now? Difference being, uploading scripts already configured or a install script that guides the configurations?

**Email September 7, 2013**

Very good, will respond in the next 12 hours, discussing with partner today.  
  
I LOVE the popup on new jobs! Thats great. I dont see the pricing and payout on the new job. We will need the ability to manually edit payouts and payouts after populating during order entry.  
----------------------------------------------  
The way it is, we can only guess what the order is going to cost or pay. Is this in development still? Looking great other than that

**Email September 10, 2013**

Blet, still not seeing the pay amounts in order entry.  
----------------------------------------------------------  
Everything is looking great I must say, order amount and pay amount per order is critical part of the billing system.  
---------------------------------------------------------  
As we are entering orders, price should populate based on service/product and tech pay based on tech/pay grade. The ability to override those prices is alos important in cases.

**Email September 12, 2013**

Hey Blet, my apology had some bad storms with outages. Reviewing now  
----------------------------------------------------------  
Yet the site seems to be down  
---------------------------------------------------------  
Looking forward to giving it the first drive Blet, yes great cooperation. Let me know when site comes back up. My email address is [mike@oo-thebox.com](mailto:mike@oo-thebox.com) It appears your server is down as well with some outages :) No problem, looking forward to finalizing this project  
---------------------------------------------------------------  
I am still not seeing price populate on the jobs Blets. Is your team unable to develop that critical part? How do we adjust prices/see prices on particular orders? To get on the same page, refer back to the Venus screens shots, the order will need to show whats being paid/received not only to the company but to the tech and the clients. I have to assume you have plans still of activating this function and is all that's really needed in order to make this go, it is however like having no steering wheel in the car without it.

**Email September 13, 2013**

That's is a huge part and step towards completion. Very good

**Email September 24, 2013**

1.A search function that we can use to find order number, customers, or whatever.

2. When a tech logs in he cannot see what the company is charging but only what he makes in the price.

3. We need to have a time window in scheduling not a exact time...example we will arrive between the hours of 12pm and 4pm. Right now you have only one field which gives us a exact time.. example.. arrival time 12pm only.

4. the states on all boards need to be in alphabetical order.

5. I need a print button in order for our Technicians to print a work order from their order screen

**Email September 25, 2013**

Blet, For the search we are looking for pretty much what you have described. Something to help us find specific order by tech, customer name, phone number, as many fields as possible.  
-------------------------------------------------------  
Blet one more thing I did notice now and this is the fact that when we assign a job the admin is forced to enter a start time and date. That function is not needed at that point. All the admin has to do is assign the job to the tech.  
---------------------------------------------------  
Blet, we will enter the Milestone for final payment tomorrow and hopefully close this project out. Thank you sir for all your assistance.

**Email September 26, 2013**

Hello Blet, below are things that we have already covered and are just not operating according to how it needs to work, how it has to work. Getting these few things repaired will at least allow us to go operational with the software Once we go operational, we will continue to write specific next version upgrades.  
  
States need to be in order a-z also on creating order page  
  
Client will not always be COD...  
  
Let me explain this again,  
  
Client is a company who provides us customers. Not all jobs will be COD as it is set now. The only jobs that are COD is customers who find us directly, such as on the internet of phone book.  
  
As an example:  
  
Fitness Blowout company is a ecommerce fitness retailer, they sell treadmills and other fitness equipment to buyers.  
  
The buyers pay fitness blowout company for a service to have it installed in their home and even delivered in some cases and in return our client pays us the money. Another example for you is, Freelancer is a client for you, since they provide you work which is performed for the customer.  
  
  
Techs don't need to see best tech and clients in the dashboard.  
  
Search is not working and needs to be searchable by name, phone number, email etc.  
  
The dispatch board will be a mess the way it is. It shows jobs that are both scheduled and unscheduled. The dispatch board should only show jobs that are scheduled and by default should start with jobs scheduled for today (current day) As an example, going to the dispatch board should by default show jobs being run today. Setting the date from and to should allow us to see jobs being ran from any date range.  
  
The dispatch board can also show jobs that has already been run if set for a past date.  
This is critical and only makes sense for any scheduling system and is so the case with all that I have demonstrated.  
  
These are critical things that we have discovered that prevent us from being able to utilize/accept the system now.   
  
We will include other things we have and will discover in specific documentation which will attach to your next awarded project shortly after we make transfer of this development.

**Email September 27, 2013**

Blet,   
We will be reviewing the program and should be releasing payment by end of day tomorrow. One thing I did not see as admin in the order edit field and that is a way to change the scheduled date or change the order status back to open.

**Email September 30, 2013**

Please show example of #2  
---------------------------------------------------------  
Blet, we are releasing the funds as we agreed to do today. Make the final adjustments as requested above and prepare for transfer of files as soon as possible. We will need to be working the weekend to install the software.   
----------------------------------------------------------------  
Blet, I would prefer uploading our own files as I have done many times. Do upload the files to be uploaded to the project via freelancer. Part of the project description was that we install our own software as their is no better time than now for me to learn experience the process  
-----------------------------------------------------------  
I will certainly share the FTP, SSH and Cpanel access as well moving forward For purpose of following Freelancer transfer requirements, simply zip files and upload to the completed project. I also request and requested that the updated files I will except on Monday, meanwhile the files as is will give me ability to learn what we have.  
------------------------------------------------------------------  
Is their any unusual or special Apache compilations that I need to process.  
  
[/var/cpanel/easy/apache/profile/\_main.yaml]  
  
Apache 2.2.25  
[More Info ↑] Expires  
Fileprotect  
Prevent Users from reading other webroots  
[More Info ↑] Frontpage  
[More Info ↑] Headers  
[More Info ↑] Mod SuPHP  
This option will make the following changes to your profile prior to the build:  
Enables:  
CGI  
[More Info ↑] Proxy  
required for cPanel/WHM/Webmail/Webdisk proxy VirtualHost support  
[More Info ↑] Rewrite  
!! Removing this will break certain functionality !!  
  
PHP 5.3.26  
[More Info ↑] Bcmath  
[More Info ↑] Calendar  
[More Info ↑] CurlSSL  
This option will make the following changes to your profile prior to the build:  
Disables:  
Curl  
  
[More Info ↑] FTP  
[More Info ↑] GD  
This option will make the following changes to your profile prior to the build:  
Enables:  
Zlib  
[More Info ↑] Imap  
[More Info ↑] Magic Quotes  
[More Info ↑] MailHeaders  
[More Info ↑] Mcrypt  
[More Info ↑] Mysql  
compile MySQL support using the PHP bundled libraries (if the System MySQL option is checked it takes precedence over this option)  
[More Info ↑] Mysql of the system  
compile mysql (and mysqli if its checked) support against the system libraries  
[More Info ↑] Openssl  
Requires OpenSSL 0.9.7 or newer  
[More Info ↑] Sockets  
[More Info ↑] TTF (FreeType)  
[More Info ↑] Zlib  
Requires that zlib is installed and up to date