PureSmile Online Booking System

Software Requirements Specification  
and Plan

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# Scope of Work

Background:

* PureSmile started in 2014 as a cosmetic teeth whitening company in Sydney. We first started with two kiosks doing teeth whitening treatments and since then we have expanded our model into cosmetic beauty salons. We contract these clinics/cosmetic salons (clinics) to do teeth whitening treatments which we sell online and pay clinics for labour. The salon acquires a new customer and we get a % from that sale. We currently do almost 100 bookings each month in our clinics and we do this all manually.
* We promote our website through SEO and social media and we are trying to position ourselves to be a booking platform for customers to be able to book cosmetic treatments.
* To be able to do this efficiently we need to automate this process and that’s where this project comes in.

Goal:

* Automation of processing of information for bookings, clinics, treatments (backend).
* The solution needs to be able to communicate with the front end, the booking form (which will need to change into a booking platform eventually)
* The solution needs to be integrated into existing web site as a stand-alone solution. The site is based on WordPress.
* The solution needs to be ran on Microsoft Azure platform
* Programming Language C#

# Functional Requirements

There should be 2 web systems, 2 sub domains:

* admin.puresmile.com.au
* booking.puresmile.com.au

*Highlighted functionality is proposed for version 2.0.*

## Booking scenario

### Scenario 1 – Successful payment and acceptance from clinic

Customer books online in Clinic A for Saturday 17/9/2016 for Treatment IdAAA they processed the payment through Paypal/Braintree. An email is generated to the clinic. This Email has ACCEPT and reject buttons. The Clinic ACCEPTS the booking and the customer is generated a receipt and confirmation of the payment along with information about their treatment. The information is stored in the database.

There is no further action required from us at this point in time.

### Scenario 2 – Successful payment and rejection from clinic

Customer books online in Clinic A for Saturday 17/9/2016 for Treatment IdAAA they processed the payment through Paypal/Braintree. An email is generated to the clinic. This Email has ACCEPT and reject buttons. The Clinic REJECTS the booking at this time. The booking will need to go to the dashboard to be actioned and coordinated by us.

We will call the clinic and find alternate time and call the customer manually.

*In version 2 we will add preferred time and secondary preferred time to eliminate some of this work.*

The dashboard will be part of the Admin.puresmile.com.au system. What did you have in mind for this?

### Scenario 3 – No payment made

Customer books online in Clinic A for Saturday 17/9/2016 for Treatment IdAAA they did not process the payment.

This booking needs to show on some dashboard of bookings to be actioned by us. So when there are 5 bookings over night, when the staff come to the office the admin dashboard and they can see there are 5 customers to be followed up. Showing what treatment they are after, when & where. I want them to be able to either process the payment online or follow up with the customer and find out that the customer no longer wants to proceed with the booking. They can note it and close the booking request. The booking disappears from the dashboard.

If a booking is taken over the phone with the customer we need to be able to push that email to the clinic showing the details of the booking (accept or reject button). The clinic will not know if the booking was placed over the phone or not.

# Site Map

The following describes list of pages and their functionality briefly.

### Admin Interface - admin.puresmile.com.au

1. Login page (public page)
2. List of admin users
3. List of bookings:
   * Filter by name, date, clinic and if is paid or not;
   * Table of booking with sortable columns and with paging. Default sorting by booking date, descending;
4. Page of a booking:
   * Fields of a booking (first name, last name, visit date, visit time, etc.) – allow to edit fields values
   * Status
   * Actions:
     + Save
     + Make payment via BrainTree
     + Cancel booking
     + Confirm booking with clinic – email to clinic outside the system
     + Email receipt to client
     + *SMS to client on the date of the booking (v2.0)*
     + **What else?**
5. Treatment dictionary:
   * Treatment list, create, update, delete;
   * *History of changes;*
6. Customer dictionary:
   * List with filter;
   * Client record page:
     + Create
     + Update
     + Do refund via BrainTree
     + Create payment
     + Get list of bookings by redirecting to list of bookings with the filter;
     + *History of changes;*
     + *Payments*
     + *Refunds*
     + *Bookings*
     + *Text comments (a.k.a. CRM)*
7. Clinics dictionary:
   * Get list – can give you one sample clinic with all the information we ask them to fill out for us.
   * Clinic record page:
     + View, Create, edit
     + Get list of bookings by redirecting to list of bookings with the filter;
     + *Set up connection with Treatments dictionary, including specifying reward as % of revenue per clinic per treatment.*
     + *History of changes;*
     + *List of payments*
     + *List of refunds*
     + *List of bookings*
     + *Text comments (a.k.a. CRM)*
8. Payments and refunds:
   * List of;
   * Create payment
   * Enter refund
9. My notifications:
   * List of;
10. *Reports – available for admins with specific permission:*
    * *”Clinics and their treatments for the given period” summary:*
      + *Clinic*
      + *Number of treatments performed*
      + *Number of customers*
      + *Money spent (spent by customer)*
      + *Money earned (earned by clinic)*
    * *”Clinics and their treatments for the given period” detail:*
      + *Clinic*
      + *Date*
      + *Treatment*
      + *Customer name*
      + *Customer feedback (n/a if no feedback has been left)*
      + *Money spent (spent by customer)*
      + *Money earned (earned by clinic)*
    * *Treatments for the given period:*
      + *Treatment*
      + *# of treatments submitted*
      + *# of customers submitted*
      + *# of treatments applied (not cancelled)*
      + *# of customers applied (not cancelled)*
      + *Money spent (spent by customer)*
      + *Money earned (earned by clinic)*
      + *# of feedbacks left*

### Client Interface - booking.puresmile.com.au

If a client gets email with the link to page of the system (say, info about booking), the link contains secret link which is appropriate for this client and the given page only, so the client does not have to login into the system to access the record. The system identifies the client by this secret link.

If a client wants to access its records without link from email, he/she needs to register and authorize in the system.

Pages are:

1. Make a booking – public page
2. Register via Google+, Facebook, Twitter (no login+password option)
3. Login via Google+, Facebook, Twitter
4. My bookings:
   * List of – accessible by logging in AND by secret link in emails
   * See details of, including status, payment;
   * *Leave feedback*
   * *Send message to admin*
5. My payments and refunds (*do we need separate page that should how much spent to make user sad* ☺? )
6. My notifications – accessible by logging in AND by secret link in emails
7. Manage my profile – accessible by logging in AND by secret link in emails

### Notification Subsystem

This part of the system does not have interface. This module sends email according to the rules predefined in it. each email is logged into “My notifications” section of both interface (client and admin).

Email notification letter should have HTML formatting.

*Send text messages to phones besides regular emails.*

Notifications are:

| **#** | **Condition** | **Recipient** | **Comment** |
| --- | --- | --- | --- |
|  | Booking created | Client, Admins | Contains secret direct links to the booking: 2 domains = 2 links = 2 templates for each letter |
|  | Booking cancelled | Client, Admins |
|  | Booking accepted by admin | Client, Admins |
|  | Payment received | Client, Admins |
|  | Refund made | Client, Admins |
|  | *Client has left feedback* | *Admins* | *Admin link* |

# Plan of Work

| **#** | **Task** | **Efforts (hours)** | **Duration (work days)** | **Cost (USD)** |
| --- | --- | --- | --- | --- |
|  | Create DB model | 4 | 1 | 50 |
|  | Create design and static UI interface | 16 | 5 | 300 |
|  | Create program wireframe, admin authorization, pages stubs | 12 | 1 |
|  | Create booking functionality, all dictionary pages just to show data | 24 | 4 | 500 |
|  | Create admin functionality on the pages (confirm, cancel, refund, …) | 24 | 4 |
|  | Create integration with BrainTree and functionality to accept payment | 16 | 2 | 350 |
|  | Create notifications | 16 | 3 |
|  | Refund functionality via BrainTree, incl. check permission of admins | 20 | 3 | 220 |
|  | Reports | 8 | 2 | 80 |
|  | Total: | 140 | 20 | 1500 |

Estimate is rough and preliminary.