

# Scheduling Plug-In

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## Analysis required

**Problem:** Tony will be offering "free consultations" to prospects interested in the company's services. Those prospects will need the ability to schedule a consultation with Tony, which corresponds with his availability. Tony wants to call this a "plug-in" because this plug-in needs to be able to add this functionality to different parts of our website and possibly from social media posts.

### Requirements:

- The ability for Tony to select the time periods that are available for consultations, so only those days/times show up on the calendar.
- The ability for Tony to tell the system how long a "consultation slot" should be. Maybe that is 30 minutes, or 60 minutes, or some other time period.
- The ability for a prospect to see a calendar that shows the available time slots.
- The system should email the prospect the meeting time confirmation. This email should also include the ability for the prospect to easily import the meeting information into their Gmail calendar or their Outlook calendar.
- The system should also send out a meeting reminder 4 business hours before the meeting. For example, if the meeting is at 2 pm, then the meeting reminder should be sent at 10 am. If the meeting is scheduled before noon, then two reminders should be sent: one at 4 pm the day before and the second one 1 hour before the meeting.
- The ability for Tony to set up a questionnaire for each type of consultation, that the prospect would need to fill out, in order to participate in the consultation. This allows Tony to prepare for the consultation ahead of

time. The questionnaires would be different, depending on if it is a Joule Broker consultation compared to an MGI Solutions consultation.

- The system needs to store all of the scheduled consultations. It also needs to store all of the completed questionnaires. It needs to keep track of whether or not a questionnaire is complete. If not, then the system needs to remind the prospect to finish filling out the questionnaire. If it is not filled out, then the consultation should be rescheduled when the questionnaire is complete.

## Plug-in solution

We will create a new website using difference architecture and systems without change architecture on JB & MGI websites.

My suggestion is to add a button at the Contact Page or pop-up on JB & MGI websites to suggest prospects request a free consultation. If the prospect clicks on the “Request Consultation” button, the site will open the calendar page and allow the prospect to set schedule on free slot consultation. And admin site to manage, approve, decline consultation.

## Question

I have some question please clarify it. Thank you.

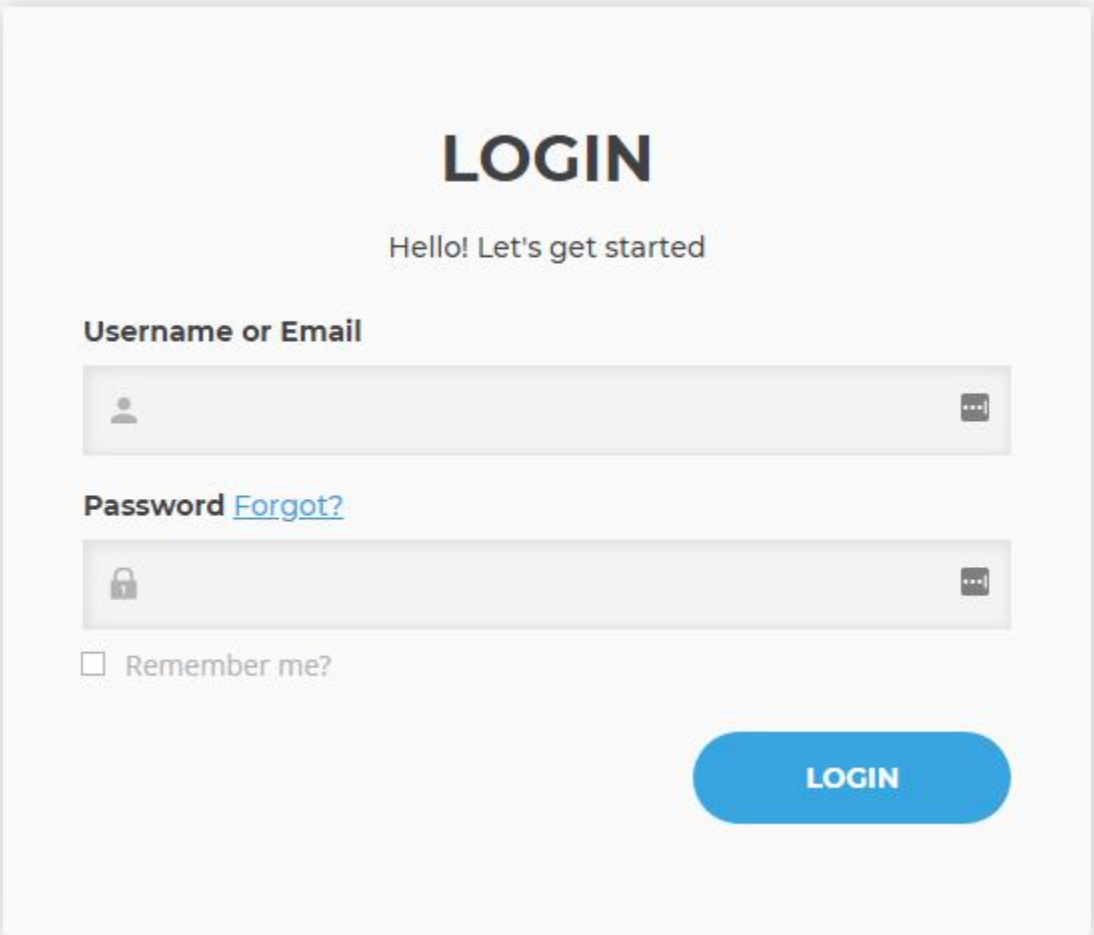
1. The consultation is online or meeting at the specific address?
  - I will add the address on the consultation details
2. Does consultation have status Success/Fail/Re-schedule?
3. How many users do you want to process this Plug-in? Only you or can add more users?
4. In case someone trying to spam the Plugin, do you want to ban their phone number and email address?

*I will separate this BA document into three parts: Admin side, Prospect side, System side.*

## Admin side

### Login Page

- Email
- Password
- [Forget password](#)
- Remember me checkbox
- Login button

A login page mockup with a light gray background. At the top center is the word "LOGIN" in large, bold, dark blue letters. Below it is the text "Hello! Let's get started" in a smaller, dark gray font. There are two input fields: the first is labeled "Username or Email" and contains a person icon on the left and a clear button (three dots) on the right; the second is labeled "Password" and contains a lock icon on the left and a clear button on the right. A blue link "Forgot?" is positioned to the right of the "Password" label. Below the input fields is a checkbox labeled "Remember me?". At the bottom right is a blue rounded rectangular button with the word "LOGIN" in white capital letters.

**LOGIN**

Hello! Let's get started

**Username or Email**

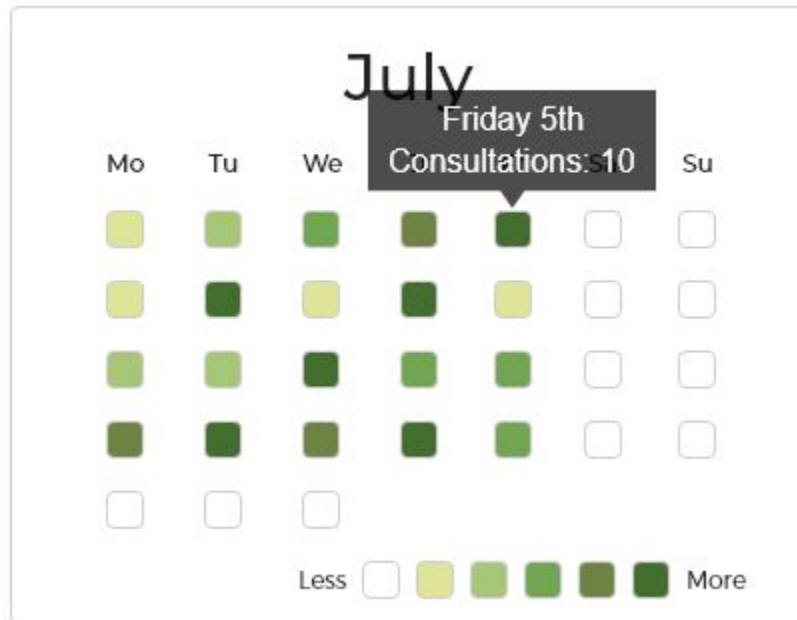
**Password** [Forgot?](#)

☐ Remember me?

**LOGIN**

## Homepage - Dashboard page

- Heatmap calendar: to show the activities of this month
  - Green dot to show up how many consultations in a day.
  - Hover on the green dot view tooltips: a total of consultation of that day



- Next consultation
  - Date-time
  - Prospect info
    - Name
    - Email

- Phone Number
  - Contact from (The page prospect require a consultation)
  - View more link (to view the answers)
- Metric card
  - Total consultation
  - Total consultation remain
  - Avg consultation per month = Total consultation/business day of this month
- Next consultation list - Pending consultation list
  - A grid
    - Name
    - Date-time meeting (default sort)
    - Contact from
    - Command column
      - Decline button
      - Accept button
      - Details button
  - View more link
    - Display a pop-up with detail consultation
      - Full Name
      - Email
      - Phone number
      - Date
      - Time



- Contact from
- Question and answers list
- Paging if we have more questions
- Approve button
- Decline button
- Cancel button
- Approve/Decline action
  - Ask the user to confirm their action “Do you want to accept/decline this consultation”
  - Reason textbox to write a reason (required)
  - Yes/No button

Home

Calendar

Manage Consultation

Manage Questionnaire



## July



### Next Consultation

Date: 07-26-2019 14:00 - 15:30  
Full Name: Jimmy McGill  
Email: jimmy@mcgill.com  
Phone Number: (234)-124-254  
Contact from: Joule Broker

[View more >>](#)

### Analysis Consultation

Total Consultation this month 20  
Total Consultation remain 12  
AVG Consultation this month 1.6/days

Full Name	Date	Time	Page	Commands
Jimmy McGill	07-26-2019	14:00 - 15:30	Joule Broker	<a href="#">Decline</a> <a href="#">Details</a>
Walter White	07-26-2019	16:00 - 16:30	MGI Solutions	<a href="#">Decline</a> <a href="#">Details</a>
Jessie Pinkman	07-27-2019	08:00 - 9:00	Joule Broker	<a href="#">Decline</a> <a href="#">Details</a>
Gustavo Frings	07-27-2019	10:00 - 10:45	MGI Solutions	<a href="#">Decline</a> <a href="#">Details</a>
Jacob Peralta	07-27-2019	14:00 - 14:30	MGI Solutions	<a href="#">Decline</a> <a href="#">Details</a>
Raymond Holt	07-27-2019	15:00 - 16:30	Joule Broker	<a href="#">Decline</a> <a href="#">Details</a>
Elliot Alderson	07-29-2019	08:30 - 9:15	MGI Solutions	<a href="#">Decline</a> <a href="#">Details</a>
Julie Nguyen	07-29-2019	09:30 - 11:00	Joule Broker	<a href="#">Decline</a> <a href="#">Details</a>
Minh Tong	07-29-2019	14:00 - 15:30	MGI Solutions	<a href="#">Decline</a> <a href="#">Details</a>
Pete Mitchell	07-30-2019	10:15 - 11:45	MGI Solutions	<a href="#">Decline</a> <a href="#">Details</a>
Kate Smith	07-31-2019	15:30 - 16:15	Joule Broker	<a href="#">Decline</a> <a href="#">Details</a>

Full Name	Date	Time	Page	Commands
Rosa Diaz	07-26-2019	14:00 - 15:30	Joule Broker	<a href="#">Decline</a> <a href="#">Accept</a> <a href="#">Details</a>
Terry Jeffords	07-26-2019	16:00 - 16:30	MGI Solutions	<a href="#">Decline</a> <a href="#">Accept</a> <a href="#">Details</a>
Charles Boyle	07-27-2019	08:00 - 9:00	Joule Broker	<a href="#">Decline</a> <a href="#">Accept</a> <a href="#">Details</a>
Skyler White	07-27-2019	10:00 - 10:45	MGI Solutions	<a href="#">Decline</a> <a href="#">Accept</a> <a href="#">Details</a>
Hank Schrader	07-27-2019	14:00 - 14:30	MGI Solutions	<a href="#">Decline</a> <a href="#">Accept</a> <a href="#">Details</a>
Marie Schrader	07-27-2019	15:00 - 16:30	Joule Broker	<a href="#">Decline</a> <a href="#">Accept</a> <a href="#">Details</a>
Angela Moss	07-29-2019	08:30 - 9:15	MGI Solutions	<a href="#">Decline</a> <a href="#">Accept</a> <a href="#">Details</a>
Tyrell Wellick	07-29-2019	09:30 - 11:00	Joule Broker	<a href="#">Decline</a> <a href="#">Accept</a> <a href="#">Details</a>
Phillip Price	07-29-2019	14:00 - 15:30	MGI Solutions	<a href="#">Decline</a> <a href="#">Accept</a> <a href="#">Details</a>
James Greer	07-30-2019	10:15 - 11:45	MGI Solutions	<a href="#">Decline</a> <a href="#">Accept</a> <a href="#">Details</a>
Cathy Mueller	07-31-2019	15:30 - 16:15	Joule Broker	<a href="#">Decline</a> <a href="#">Accept</a> <a href="#">Details</a>



- Home
- Calendar
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July

Mo Tu We Th Fr Sa Su

Next Consultation

Date: 07-26-2019 14:00 - 15:30

Analysis Consultation

Total Consultation this month 20

ation remain 12

ation this month 1.6/days

Full Name

Jimmy Mc

Walter Whi

Jessie Pink

Gustavo Fri

Jacob Pera

Raymond H

Elliot Alder

Julie Nguye

Minh Tong

Full Name

Bo Nguyen

Email Address

Bo\_nguyen@pisoft.com

Phone Number

(222) - 145 - 5252

Date

08-01-2019

Time

08:30 AM - 09:30 AM

Contact from

Joule Broker

Question 1:

>Lorem ipsum dolor sit amet, consectetur adipiscing elit?

Etiam sed rhoncus orci. Aliquam hendrerit arcu egestas, euismod turpis vel, elementum velit. Suspendisse non ultricies magna, eu placerat felis. Cras metus magna, faucibus at magna id, vehicula vestibulum ex.

Question 2:

Praesent varius pretium libero nec tincidunt?

Donec ultrices metus massa, sit amet mollis magna sollicitudin vel. Donec non ex in sem rutrum hendrerit nec eu sapien. Praesent placerat elit vitae nunc blandit, ut convallis ligula consequat.

Question 3:

Maecenas et posuere quam, vel porttitor?

Nunc ut nibh nisi. Morbi pellentesque lectus at lorem suscipit imperdiet. Interdum et malesuada fames ac ante ipsum primis in faucibus.

Question 4:

Praesent varius pretium libero nec tincidunt?

Donec ultrices metus massa, sit amet mollis magna sollicitudin vel. Donec non ex in sem rutrum hendrerit nec eu sapien. Praesent placerat elit vitae nunc blandit, ut convallis ligula consequat.

Question 5:

Praesent varius pretium libero nec tincidunt?

Donec ultrices metus massa, sit amet mollis magna sollicitudin vel. Donec non ex in sem rutrum hendrerit nec eu sapien. Praesent placerat elit vitae nunc blandit, ut convallis ligula consequat.

Question 6:

Praesent varius pretium libero nec tincidunt?

Donec ultrices metus massa, sit amet mollis magna sollicitudin vel. Donec non ex in sem rutrum hendrerit nec eu sapien. Praesent placerat elit vitae nunc blandit, ut convallis ligula consequat.

Question 7:

Praesent varius pretium libero nec tincidunt?

Donec ultrices metus massa, sit amet mollis magna sollicitudin vel. Donec non ex in sem rutrum hendrerit nec eu sapien. Praesent placerat elit vitae nunc blandit, ut convallis ligula consequat.

Question 8:

Praesent varius pretium libero nec tincidunt?

Donec ultrices metus massa, sit amet mollis magna sollicitudin vel. Donec non ex in sem rutrum hendrerit nec eu sapien. Praesent placerat elit vitae nunc blandit, ut convallis ligula consequat.

1 2 >

Decline

Close

age	Commands
Broker	<div>Decline</div> <div>Accept</div> <div>Details</div>
olutions	<div>Decline</div> <div>Accept</div> <div>Details</div>
Broker	<div>Decline</div> <div>Accept</div> <div>Details</div>
olutions	<div>Decline</div> <div>Accept</div> <div>Details</div>
olutions	<div>Decline</div> <div>Accept</div> <div>Details</div>
Broker	<div>Decline</div> <div>Accept</div> <div>Details</div>
olutions	<div>Decline</div> <div>Accept</div> <div>Details</div>
Broker	<div>Decline</div> <div>Accept</div> <div>Details</div>
olutions	<div>Decline</div> <div>Accept</div> <div>Details</div>
Pete Mitchell	07-30-2019 10:15 - 11:45 MGI Solutions <div>Decline</div> <div>Details</div>
Kate Smith	07-31-2019 15:30 - 16:15 Joule Broker <div>Decline</div> <div>Details</div>
James Greer	07-30-2019 10:15 - 11:45 MGI Solutions <div>Decline</div> <div>Accept</div> <div>Details</div>
Cathy Mueller	07-31-2019 15:30 - 16:15 Joule Broker <div>Decline</div> <div>Accept</div> <div>Details</div>

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- Home
- Calendar
- Manage Consultation
- Manage Questionnaire

### July

Mo	Tu	We	Th	Fr	Sa	Su

### Next Consultation

Date: 07-26-2019 14:00 - 15:30

### Analysis Consultation

Total Consultation this month	20
Consultation remain	12
Consultation this month	1.6/days

## Consultation Detail

Full Name: Bo Nguyen

Email Address: Bo\_nguyen@pisoft.com

Phone Number: (222) - 145 - 5252

Date: 08-01-2019

Time: 08:30 AM - 09:30 AM

Contact from: Joule Broker

Question 1: Lorem ipsum dolor sit amet, consectetur adipiscing elit?

Question 2: Praesent varius pretium libero nec tincidunt?

Question 3: Maecenas et posuere quam, vel porttitor?

Question 4: Praesent varius pretium libero nec tincidunt?

Question 5: Praesent varius pretium libero nec tincidunt?

Question 6: Praesent varius pretium libero nec tincidunt?

Question 7: Praesent varius pretium libero nec tincidunt?

Question 8: Praesent varius pretium libero nec tincidunt?

12 >

Decline

Accept

Close

Full Name	Date	Time	Agency	Commands
Jimmy Mc			Broker	<div>Decline</div> <div>Accept</div> <div>Details</div>
Walter Whi			Solutions	<div>Decline</div> <div>Accept</div> <div>Details</div>
Jessie Pink			Broker	<div>Decline</div> <div>Accept</div> <div>Details</div>
Gustavo Fri			Solutions	<div>Decline</div> <div>Accept</div> <div>Details</div>
Jacob Pera			Solutions	<div>Decline</div> <div>Accept</div> <div>Details</div>
Raymond H			Broker	<div>Decline</div> <div>Accept</div> <div>Details</div>
Elliot Alder			Solutions	<div>Decline</div> <div>Accept</div> <div>Details</div>
Julie Nguy			Broker	<div>Decline</div> <div>Accept</div> <div>Details</div>
Minh Tong			Solutions	<div>Decline</div> <div>Accept</div> <div>Details</div>
Pete Mitchell	07-30-2019	10:15 - 11:45	MGI Solutions	<div>Decline</div> <div>Details</div>
Kate Smith	07-31-2019	15:30 - 16:15	Joule Broker	<div>Decline</div> <div>Details</div>
James Greer	07-30-2019	10:15 - 11:45	MGI Solutions	<div>Decline</div> <div>Accept</div> <div>Details</div>
Cathy Mueller	07-31-2019	15:30 - 16:15	Joule Broker	<div>Decline</div> <div>Accept</div> <div>Details</div>





- Home
- Calendar
- Manage Consultation
- Manage Questionnaire

July

Mo Tu We Th Fr Sa Su

### Full Name

- Jimmy Mc
- Walter Whi
- Jessie Pinki
- Gustavo Fri
- Jacob Pera
- Raymond t
- Elliot Alder
- Julie Nguy
- Minh Tong

Full Name Bo Nguyen  
Email Address Bo\_nguyen@pisoft.com  
Phone Number (222) - 145 - 5252  
Date 08-01-2019  
Time 08:30 AM - 09:30 AM  
Contact from Joule Broker

- Question 1: Lorem ipsum dolor sit amet, consectetur adipiscing elit?
- Etiam sed rhoncus orci. Aliquam hendrerit arcu egestas, euismod turpis vel, elementum velit. Suspendisse non ultricies magna, eu placerat felis. Cras metus magna, faucibus at magna id, vehicula vestibulum ex.
- Question 2: Praesent varius pretium libero nec tincidunt?
- Donec ultrices metus massa, sit amet mollis magna sollicitudin vel. Donec non ex in sem rutrum hendrerit nec eu sapien. Praesent placerat elit vitae nunc blandit, ut convallis ligula consequat.
- Question 3: Maecenas et posuere quam, vel porttitor?
- Nunc ut nibh nisi. Morbi pellentesque lectus at lorem suscipit imperdiet. Interdum et malesuada fames ac ante ipsum primis in faucibus.

Add this consultation to your calendar?

Reason\*

Cancel

Saved

- Question 4: Praesent varius pretium libero nec tincidunt?
- Donec ultrices metus massa, sit amet mollis magna sollicitudin vel. Donec non ex in sem rutrum hendrerit nec eu sapien. Praesent placerat elit vitae nunc blandit, ut convallis ligula consequat.
- Question 5: Praesent varius pretium libero nec tincidunt?
- Donec ultrices metus massa, sit amet mollis magna sollicitudin vel. Donec non ex in sem rutrum hendrerit nec eu sapien. Praesent placerat elit vitae nunc blandit, ut convallis ligula consequat.
- Question 6: Praesent varius pretium libero nec tincidunt?
- Donec ultrices metus massa, sit amet mollis magna sollicitudin vel. Donec non ex in sem rutrum hendrerit nec eu sapien. Praesent placerat elit vitae nunc blandit, ut convallis ligula consequat.
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Analysis Consultation

Total Consultation this month 20

ation remain 12

ation this month 1.6/days

Time

08:30 AM - 09:30 AM

Contact from

Joule Broker

Question 1:

Lorem ipsum dolor sit amet, consectetur adipiscing elit?

Etiam sed rhoncus orci. Aliquam hendrerit arcu egestas, euismod turpis vel, elementum velit. Suspendisse non ultricies magna, eu placerat felis. Cras metus magna, faucibus at magna id, vehicula vestibulum ex.

Question 2:

Praesent varius pretium libero nec tincidunt?

Donec ultrices metus massa, sit amet mollis magna sollicitudin vel. Donec non ex in sem rutrum hendrerit nec eu sapien. Praesent placerat elit vitae nunc blandit, ut convallis ligula consequat.

Question 3:

Maecenas et posuere quam, vel porttitor?

Nunc ut nibh nisi. Morbi pellentesque lectus at lorem suscipit imperdiet. Interdum et malesuada fames ac ante ipsum primis in faucibus.

1

2

>

Decline

Accept

Close

Question 6:

Praesent varius pretium libero nec tincidunt?

Donec ultrices metus massa, sit amet mollis magna sollicitudin vel. Donec non ex in sem rutrum hendrerit nec eu sapien. Praesent placerat elit vitae nunc blandit, ut convallis ligula consequat.

Question 7:

Praesent varius pretium libero nec tincidunt?

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Question 8:

Praesent varius pretium libero nec tincidunt?

Donec ultrices metus massa, sit amet mollis magna sollicitudin vel. Donec non ex in sem rutrum hendrerit nec eu sapien. Praesent placerat elit vitae nunc blandit, ut convallis ligula consequat.

Full Name

Jimmy McCoy

Walter White

Jessie Pinkman

Gustavo Fring

Jacob Perabo

Raymond T. Chandler

Elliot Alderson

Julie Nguyen

Minh Tong

Pete Mitchell

Kate Smith

07-30-2019

10:15 - 11:45

MGI Solutions

Decline

Details

07-31-2019

15:30 - 16:15

Joule Broker

Decline

Details

James Greer

07-30-2019

10:15 - 11:45

MGI Solutions

Decline

Accept

Details

Cathy Mueller

07-31-2019

15:30 - 16:15

Joule Broker

Decline

Accept

Details

Page

Commands

Broker

Decline

Accept

Details

solutions

Decline

Accept

Details

Broker

Decline

Accept

Details

solutions

Decline

Accept

Details

solutions

Decline

Accept

Details

Broker

Decline

Accept

Details

solutions

Decline

Accept

Details

Broker

Decline

Accept

Details

solutions

Decline

Accept

Details

solutions





Decline

Accept

Details

## Calendar page

- View as Google calendar
  - Allow the user change view between Day, Week, Month with hour list (default = week)
- Time slot
  - Default time list is grey
  - Time slot color
    - White: Available time slot
    - Blue: Next consultation
    - Green: Today consultation
  - Filter time slot view on the calendar (default = view all available to save the filter setting)
    - White: Available time slot (default - no-filter)
    - Yellow: Consultation expired
    - Blue: Next consultation
    - Green: Consultation at the moment
- Create/Edit/Delete time slot
  - Create: Click on the calendar or Create button to create a new Free Time
    - Date
    - Time start
    - Time end
    - Duration = [Time End] - [Time start] (or enter Time start + Duration = Time End)
    - Note

-  Available time slot
-  Consultation expired
-  Next consultation
-  Consultation at the moment























Date

Time   To

Duration  Minutes

Note

- Edit: Click on Free time slot on the Calendar or Free slot list to edit Date time
- Delete: Delete free time slot on Edit or Free Time list
- List free slot by Grid list
  - Date
  - Time
  - Duration
  - Note
  - Commands

Date	Time	Duration	Note	Commands		
07-26-2019	14:00 - 15:30	90		 Delete	Edit	 Details
07-26-2019	16:00 - 16:30	30		 Delete	Edit	 Details
07-27-2019	08:00 - 9:00	60		 Delete	Edit	 Details
07-27-2019	10:00 - 10:45	45		 Delete	Edit	 Details
07-27-2019	14:00 - 14:30	30		 Delete	Edit	 Details
07-27-2019	15:00 - 16:30	90		 Delete	Edit	 Details
07-29-2019	08:30 - 9:15	45		 Delete	Edit	 Details
07-29-2019	09:30 - 11:00	90		 Delete	Edit	 Details
07-29-2019	14:00 - 15:30	90		 Delete	Edit	 Details
07-30-2019	10:15 - 11:45	90		 Delete	Edit	 Details
07-31-2019	15:30 - 16:15	45		 Delete	Edit	 Details

- Create a new free slot by user
  - User click on the calendar to open create a new free slot page



	MON 15	TUE 16	WED 17	THU 18	FRI 19	SAT 20	
GMT+07							
07:00							
08:00							
09:00							
10:00							
11:00							
12:00							
13:00							
14:00							
15:00							
16:00							
17:00							
18:00							
19:00							
20:00							
21:00							
22:00							
23:00							

Day

D

Week

W

Month

M

Year

Y

Schedule

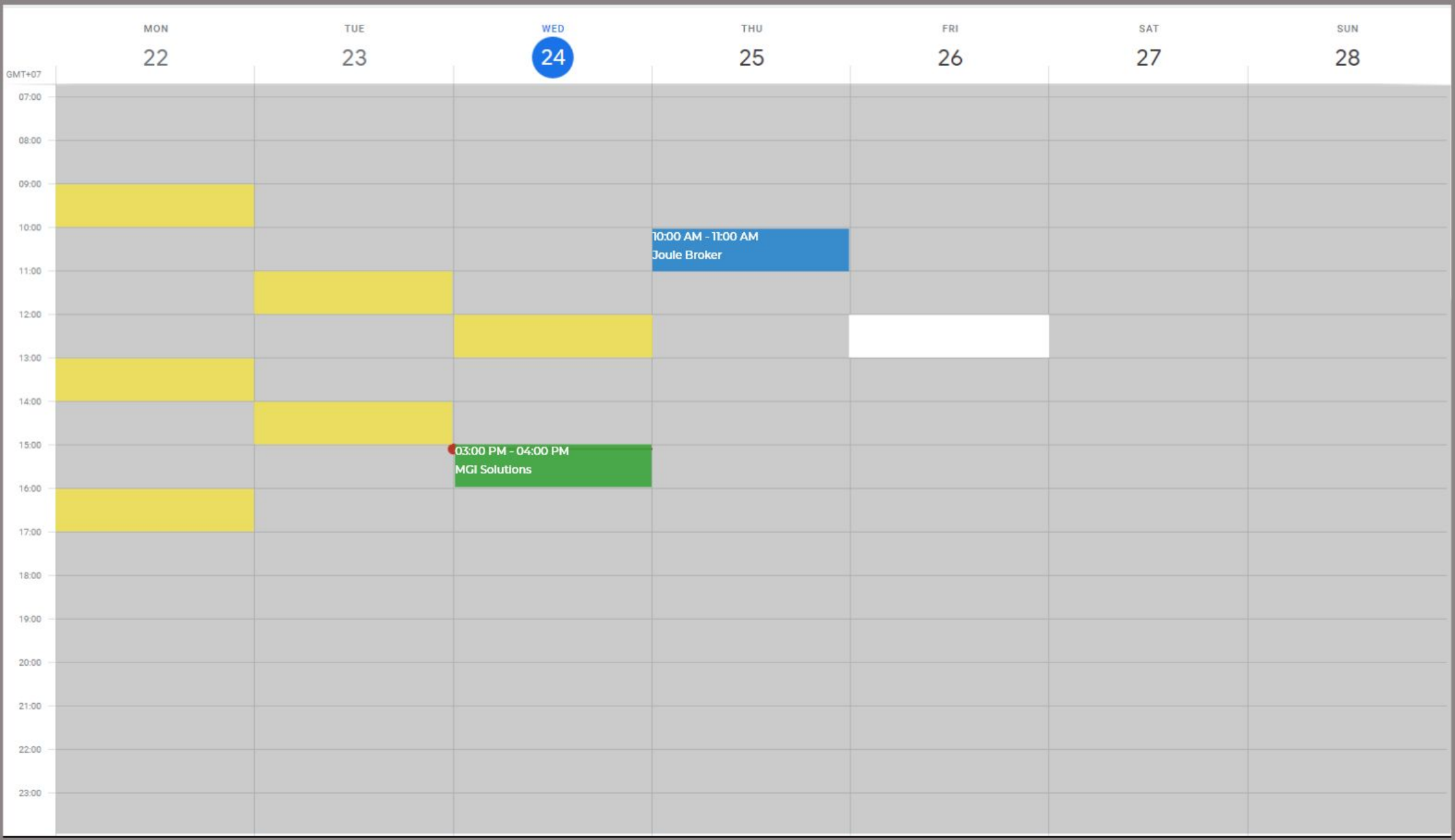
A

4 days

X

✓ Show weekends

✓ Show declined events



GMT+07

MON 22

TUE 23

WED 24

THU 25

FRI 26

SAT 27

SUN 28

07:00

08:00

09:00

10:00

11:00

12:00

13:00

14:00

15:00

16:00

17:00

18:00

19:00

20:00

21:00

22:00

23:00

## Manage Consultation

- Tab view consultation list - Default = Approved

All Consultation Approved Pending

- Display list consultation by grid
  - ID consultation
  - Full Name
  - Email address
  - Date time request consultation (Default sort)
  - Tag (MGI, Joule Broker)
  - Note (Reason)
  - Commands (Control button)
    - Approved: Cancel button, Details button
    - Pending: Approve button, Decline button, Details button

Id	Full Name	Email	Date time request	Tag	Note	Commands
				All		
1	Jimmy McGill	jimmy@mcgill.com	07-26-2019	Joule Broker	Prospect customer	<button>✖Decline</button> <button>Approve</button>

## Manage Questionnaire

- Joule Broker category
  - View question list
  - Add question
  - Remove question
  - Sort question
- MGI Solutions category
  - View question list
  - Add question
  - Remove question
  - Sort question

## Profile

- Manage Password
- Logout

Manage Password

Logout

MGI Solutions

Joule Broker

Create


#	Question	Commands	
1		<div>X Delete</div>	<div>Edit</div>
2		<div>X Delete</div>	<div>Edit</div>
3		<div>X Delete</div>	<div>Edit</div>
4		<div>X Delete</div>	<div>Edit</div>
5		<div>X Delete</div>	<div>Edit</div>
6		<div>X Delete</div>	<div>Edit</div>
7		<div>X Delete</div>	<div>Edit</div>
8		<div>X Delete</div>	<div>Edit</div>
9		<div>X Delete</div>	<div>Edit</div>
10		<div>X Delete</div>	<div>Edit</div>
11		<div>X Delete</div>	<div>Edit</div>


## Prospect Side

### 1. Prospect require

Prospect will require a Free Consultation on Joule Broker or MGI Solutions by click on the “Get free consultation” button on Contact Page.

#### Get In Touch

First Name *		Last Name *
Company *		
Email *		
Phone *		
Message *		

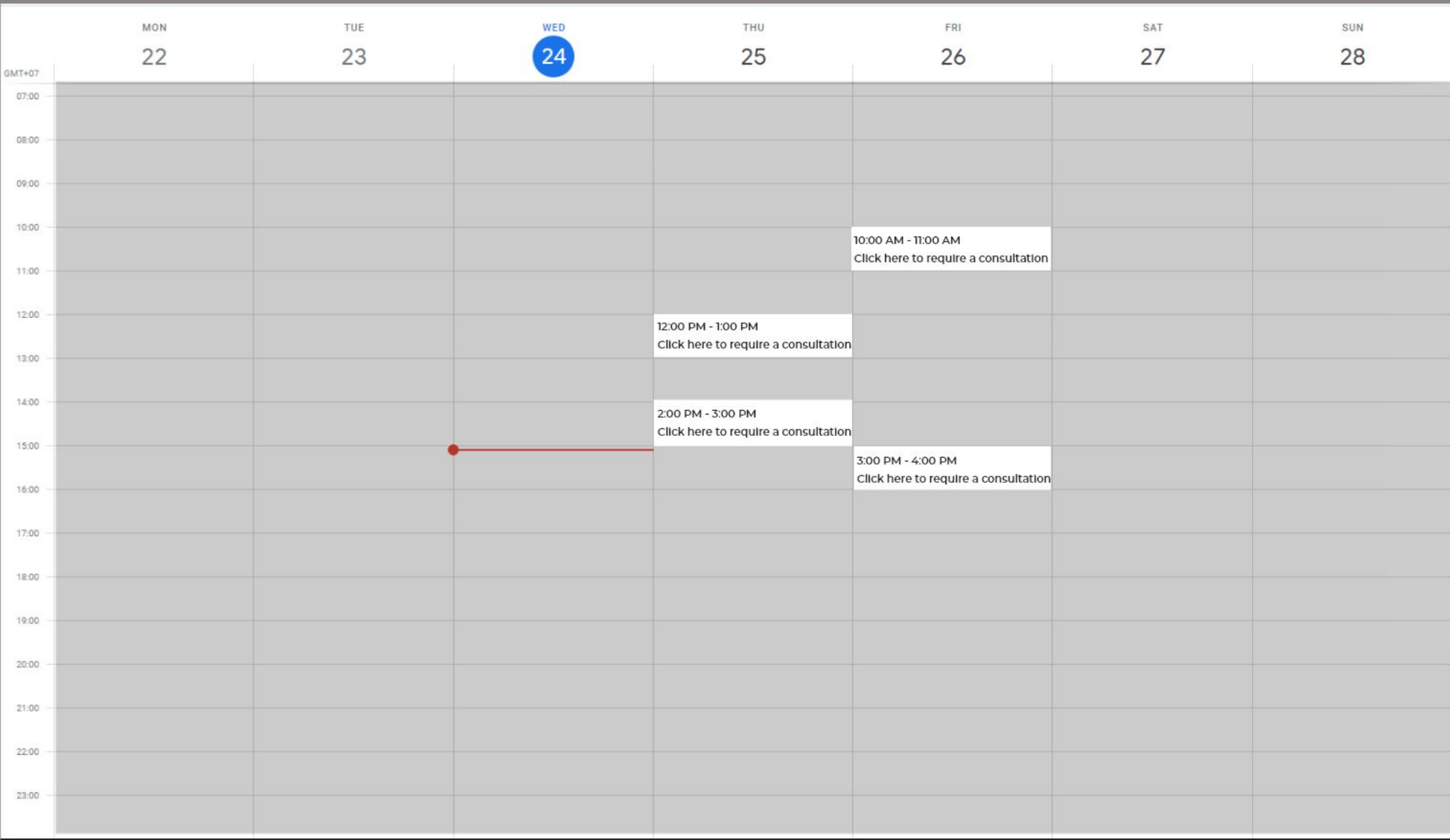


SUBMIT

REQUEST A FREE CONSULTATION

## 2. Prospect set schedule for consultation

- It will open the [calendar page to allow the prospect set schedule for a consultation](#).
- Prospect will view the calendar page with free slot only
- Prospect clicks on a free time slot to set schedule for a consultation
- Prospect has to fill email address, phone number, answers all of the questionnaires and click on Google Captcha to confirm it doesn't a bot.
- The Calendar page will pop-up a message "Check your email to confirm the request".
- The page will send an email to confirm the consultation, the prospect can accept or decline the consultation.





MON

22

TUE

23

WED

24

THU

25

FRI

26

SAT

27

SUN

28

## Request Consultation

Full Name\*

Email Address\*

Phone Number\*

Date 07-26-2019

Time 10:00 AM - 11:00 AM

Contact from Joule Broker

Question 1: \* Lorem ipsum dolor sit amet, consectetur adipiscing elit?

Question 2: \* Praesent varius pretium libero nec tincidunt?

Question 3: \* Maecenas et posuere quam, vel porttitor?

Question 4: \* Praesent varius pretium libero nec tincidunt?

Question 5: \* Praesent varius pretium libero nec tincidunt?

Question 6: \* Praesent varius pretium libero nec tincidunt?

Question 7: \* Praesent varius pretium libero nec tincidunt?

Question 8: \* Praesent varius pretium libero nec tincidunt?

1

2

&gt;

☐

I'm not a robot

reCAPTCHA  
Privacy - Terms

	MON 22	TUE 23	WED 24	THU 25	FRI 26	SAT 27	SUN 28
GMT+07							
07:00							
08:00							
09:00							
10:00							
11:00							
12:00							
13:00							
14:00							
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16:00							
17:00							
18:00							
19:00							
20:00							
21:00							
22:00							
23:00							

10:00 AM - 11:00 AM  
[Click here to require a consultation](#)



Require consultation succeed.  
Please check your email inbox to confirm the requirement.

Close

### 3. Prospect confirm the consultation

Send an email to make sure prospect wants a consultation

- Date - time request
- [Confirm button Yes/No from their action](#)

### 4. Remind prospect before the consultation

If the meeting from 8:00 AM - 12:00 PM, send a reminder via email

- 4:00 PM a day before the meeting
- 1 hour before the meeting

If the meeting from 12:01 PM to 5:00 PM, send a reminder via email

- 4 hours before the meeting. Example if the meeting at 2:00 PM, send the reminder at 10:00 AM
- 1 hour before the meeting

### 5. Require consultation succeed

- [Email to the prospect the information](#) about the consultation
- .ics file so they can import to Google Calendar & Outlook calendar


## System Side

### 1. Forget password

When the user clicks on forget the password, send an email to reset the password.

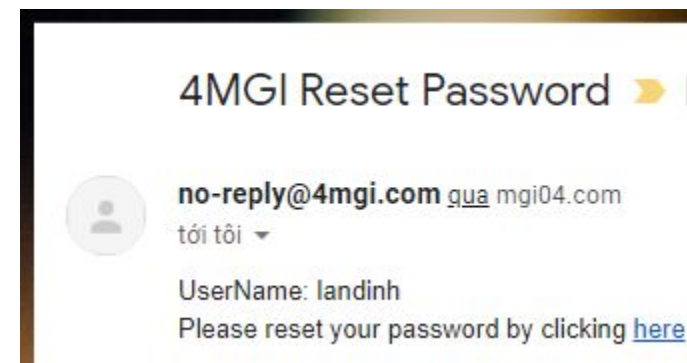
## FORGOT YOUR PASSWORD?

Email



[Return to Login](#)

SEND



## RESET YOUR PASSWORD

Email

 dinhlan77@gmail.com

New Password



Confirm password



RESET

## 2. Prospect require

Prospect click on the Request free consultation” button the system will recognize which pages prospect come from (Joule Broker or MGI Solutions).

## 3. Prospect confirm the required consultation

If the prospect confirms the email, it will open a new page with a message “Require consultation succeed”.

If the prospect declines the email, it will open a new page with a message “Thank you for your time”.

## 4. Prospect set schedule for consultation

When we got wich pages prospect came from, we will display the difference questionnaire (Joule Broker or MGI Solutions).

Prospect confirm for set schedule for a meeting

Depend on which pages prospect came from, send and email layout to confirm the action.

## 5. Accept consultation

Admin accepts the consultation

- Add the consultation to free slot on the calendar page
- Display the consultation on the Next Consultation list
- Decline the consultations have the same date-time.

Delete time slot

- Remove the free time slot list
- Remove the free time slot from the calendar
- Send an email to Prospect have required at the time to change schedule
  - With a link so the prospect can re-schedule

#### 6. Edit time slot (edit date or time)

- Update free time slot list
- Update the calendar list
- Send an email to Prospect have required at the time to change schedule
  - With a link so the prospect can re-schedule
- If Update date-time = free time exists Then deny the action.

#### 7. Decline consultation

- Send email to prospect the consultation was canceled
- Change consultation status to available
- Remove the consultation

#### 8. Free time slot expired

FreeTime.Status = available **AND** FreeTime.Date < Today

- Change FreeTime.Status = expired
- Removed Free time slot out of free time list
- Change the color on the calendar from white to yellow
- View only, cannot edit or delete

#### 9. Convert time zone

- **Note:** Convert time zone to local time zone. Default Time zone = Tampa, Florida