Hi, Carlie -

Here are the user stories you requested.

**User Stories**

* As a Scheduler, I want reminder service calls and messages, so that I can make sure customers are aware of their upcoming appointments.
* As a Scheduler, I want to see the technicians’ availability, so that I can make sure work is assigned so it can be completed efficiently.
* As a Cashier, I want to see the discount calculations for our customers to make sure they received the appropriate discount on their service.
* As a Service Tech, I want to see the parts availability, so I can plan for the customer’s repair appropriately.
* As a Service Tech, I want to see customers' service history, so I know if this repair is a repeat issue.
* As a Service Tech, I want to see the schedule calendar, so I know where I need to be and when.
* As a Service Tech, I want to be able to keep notes on customers, so I know what they’ve asked and what I still need to do.
* As a Service Tech, I want to access my schedule from my phone, so I know if my schedule or route has changed at the last minute.
* As a Parts Dept. Employee, I want to pull inventory requests every 2 hours, so I can have parts ready for the service techs when they need them.
* As a Parts Dept. Employee, I want to see the parts database, so I know when parts need to be reordered.
* As a Manager, I want customizable reporting, so I can see the different department activities for each day.
* As a Scheduler, I want to see routing/mapping of the service techs appointments, so I know if I can add on an appointment easily without taking them out of their way.
* As a Service Tech, I want to be able to offer preventative maintenance, so the customer is able to rely on their purchases from our shop.
* As a Service Tech, I want real time messaging with the office, so I can let them know of any updates or get answers to customer questions.

Below is a sampling of the unit, integration, and system tests we are planning to run.

**Testing**

Unit Test - Result

| Scheduler makes appt | Confirmation number |
| --- | --- |
| Scheduler produces invoice | Invoice that lists everything customer is to pay for and any discounts |
| Service Tech writes estimate | Estimate that lists all charges for repairs |
| Inventory/Warehouse runs parts report | Listing of all parts and quantities on hand |
| Service Tech requests parts | Service tech sees confirmation that request was sent |
| Manager sees mapping/routing | Can tell where the tech is and where he will be going |
| Scheduler sees mapping/routing | Can tell where the tech is and where he will be going |
| Service Tech makes customer notes | Notes are available for viewing by techs and schedulers |

Integration Test -

| Scheduler sends update to Service Tech | Service tech is notified by email/test that there is an update |
| --- | --- |
| Service Tech instant messages Parts | Parts gets a message instantly with who is messaging and their question |
| Scheduler sends reminder message to customer | Customers get email/text/phone calls with reminders to their appointment time and date |
| Service Tech requests parts | Request shows on the parts report they run every 2 hours |
| Parts notifies Service Tech of availability | Service tech finds out if the part they need is in stock or needs to be ordered |
| Scheduler determines customer discount | Discount should appear on customers account |

System Test -

* Parts Inventory
  + Enter part number
  + Enter number pieces received
  + Mark part as being used
  + Delete parts
  + Reorder parts
  + Update prices
  + Run reports
  + Notify Service Techs
  + Received requests
  + Security
  + Navigation
* Customer Account
  + Enter information
  + Update information
  + Delete information
  + Received invoice
  + Pays invoice
  + Received estimate
  + Approves estimate
  + Denies estimate
  + Security
  + Navigation
* Scheduler
  + Accepts customer call
  + Enters customer account information
  + Customers information populates screen
  + Security
  + Navigation
  + Enter Service Tech appts
  + Views mapping/routing
  + Update calendar
  + Change appts
  + Remove appts
  + Update customer info
  + Delete customer info
  + Views customer notes
  + Views customer discounts
  + Views customer service plan
  + Updates customer service plan
* Service Technicians
  + Views calendar/schedule
  + View mapping/routing
  + Views customer account
  + Views customer notes
  + Views service history
  + Views parts availability
  + Messages store from field
  + Inputs estimate
  + Received approval/denial from customer
  + Requests parts
  + Notified when parts are ready

**Training**

The training plan we will use will be a combination of learning styles. There will be 5 groups of training each with information specific to those groups. Initially, training will be in a small group, in person format. There will also be training materials recorded for later use that users can get to from online video. Written documentation will also be stored online for use.

* Managers
  + Basic overview of the system
  + Reports available to be run
  + How to run them
  + Key contact people
  + How to request changes
  + Viewing appointment calendar
  + Viewing mapping/routing
* Schedulers
  + Basic overview of the system
  + How to enter appointments for techs
  + How to update appointments for techs
  + How to message techs in the field
  + Viewing mapping/routing
  + Creating invoices
  + Viewing customer information
  + Determining discounts
  + Viewing customer account
  + Updating customer account
  + Points of contact for assistance
* Service Technicians
  + Basic overview of the system
  + Viewing appointments on computer and mobile
  + Viewing mapping/routing on computer and mobile
  + Viewing customer account on computer and mobile
  + Updating customer account on computer and mobile
  + Viewing parts inventory on computer and mobile
  + Requesting parts on computer and mobile
  + Receiving message re: parts on computer and mobile
  + Messaging store when in the field
  + Points of contact for assistance
* Parts
  + Basic overview of the system
  + Viewing inventory
  + Updating inventory
  + Adding inventory
  + Deleting inventory
  + Running parts request report
  + Points of contact for assistance
* Cashiers
  + Basic overview of the system
  + Entering services
  + Entering discounts
  + Voiding sale
  + Running credit cards
  + Troubleshooting credit card issues
  + Points of contact for assistance

**Roll Out**

The new system will be rolled out using a phased approach. Rolling it out this way has many advantages and can be used in conjunction with the training plan. As each part is rolled out, we will train those users at that time. Phasing in one part at a time is going to be advantageous because we’ll see if there are any “live” issues that need to be addressed before rolling out to the next area. It will reduce the risk of major issues that could take down the whole system and possible permanent data loss. If there are problems, we can roll back the system to a previous point where there weren’t issues. It is less stressful on the users to phase in parts and on the IT team because it’s taken a little at a time. The phase in will start with the least critical department and hopefully any issues that arise will be taken care of before we get to the critical areas.

Please let me know if you have any questions.

Thanks -

Leah