**Letter Functionality / Requirements Final 11-30-13**

***Development Notes***

*I am looking to have this developed in Django/Python.*

*-Zurb Foundation HTML/CSS to be used and their relevant components/addons.*

*-Wireframe mockups will be supplied (Balsamiq) for all pages:*

*-Two parts to the site 1. Static sell pages 2. Dynamic Project Manager Pages, see below*

Static Pages

Contact Page (Styling with Address, Email, Phone, Email) and a chat function

Example Form-PDF (PDF example of letter, example of online form to be submitted)

FAQ (static, styling, 7x content items)

FEATURES (static, styling, 3x regions, 14 content items - icons + words)

Help Page (Left sidebar menu, approx 35 items-header+paragraph)

Home Page (styling, Large 100% image, 3x regions with 11 items (icons, buttons, words)

Header - Foundation Bar (Name, Menu, Button, User menu)

Footer - (4 regions, icons + words, buttons, links, menus, social links, contact form, subscribe)

Set Up Your Project (10 x project fields, CC payment fields, select plan)

Side Nav (for small devices)

Top Bar Popups (example of popups styling/content)

(note: regions are reused, here is the list:

Header, Content, Pre Sub-content, Sub-content, Footer First, Footer Middle, Footer Last, Copyright)

Project Manager Pages

(note separate one region header/footer to be used for Project Manager pages)

Project Manager Control Panel (see below)

Project Manager Example (see below)

Project Manager Reporting (see below)

Project Manager Contacts (see below)

Project Manager Submissions (see below)

**Project Manager Overview.**

This website will basically manage the process of sending out a request for a letter to be completed within the website with an electronic signature, on a project basis (anywhere from 0-400 letters per project). The Project Admin will set up a project with relevant project details (approx 10 fields). Upload names and emails of those needing to complete the letter (the recipient) and email requests to be sent to those people. The requested letter (form - approx 40 fields) will be completed within the website, and a pdf version created from both the project detail fields and the letter fields completed by the recipient. The process will be managed in 3 different tables, Contacts, Submissions, and Reporting each with different functionality, and separate page for Project Manager page/dashboard.

**Project Manager Process & Notes**

**Step One - Setting up letter Project**

**(See wireframe - Control Panel)**

-Project Manager(PM) owner signs up for a user account. Allow Linkedin/Facebook/website user sign in for users.

-PM creates a project:

Project Name

Project Owner Name

Legal owner of XXXX

Project begin date

(daily letter request emails will begin automatically on this date if not done manually, if starting immediately, set to todays date)

Project End date (no further daily letter request emails will be sent, can be changed)

Select default letter template form they wish to use: (1 type at the moment)

Selects a plan (maximum # of letters)

Storage of forms expires (free for 4 months from end of project), (additional storage $ amount to develope later)

letter to the benefit of: XYZ Company

Agrees to terms and conditions

(Adding additional users completed after project is set up)

*(Once the projected is set up. They should be guided to uploaded the contact emails/names of those who need to be sent the letter. Once that is complete they should be taken to the ‘letter Contacts’ tab in the project manager)*

**Step Two - Upload letter Contact Requests**

**(See wireframe - Letter Contacts)**

(See Contact Control Panel functionality)

-Upload or enters contact email address

-Enter manually via quick form module pop-up

-Upload via connection to Outlook/Gmail/Yahoo etc

**Step Three - Send Requests**

-Send email requests; either manually begin requests by pressing ‘Send All’, or they will be sent automatically on project begin date.

-Every 24 hours from project begin date, a reminder will be sent to those contacts who have not completed the letter

**Step Four - Letter Request Received**

-The recipient receives an email from the website, detailing they are requested to complete the letter request. They will click on the link and be taken to the website form.

- There, the respective fields will need to be completed. They will be allowed to sign-off letter with Linkedin/Facebook or just name.

- The signature field will the an ‘e-signature’.

-Once they submit the fields, they will be taken to a PDF version properly formated, the fields will infill where relevant. Those fields will be a combination of the ‘project setup fields’, and the ‘recipient completed’ fields. There are approximately 45 fields that need to be inputted into the letter

-They will have the chance to review the final letter. Save for later submission and also submit the letter if they agree with everything.

-PDF copy of letter sent to recipient.

(letter will also include the following;

-IP address of user completing form

-Date/time stamp

-Facebook or Linkedin login identifying details (I not sure what fields are available)

**Step Four - Review letter Submissions**

**(See wireframe - letter Submissions)**

(See Submissions Control Panel Functionality)

Completed letters will be saved here for review and approval.

-Project Manager is to review each letter and approve.

-Once approved, they will not appear on this list.

**Step Five - letter Reporting**

**(See Wireframe - letter Reporting)**

(See Reporting Control Panel Functionality)

-All letters that have been reviewed and approved will be included in the letter Reporting.

-The fields from the completed letter form (not the project setup fields) will be headers that are sortable (sort by ascending/descending) Approx 18 different columns.

-Rows will be a different completed/approved letter data.

Daily Functions For website to undertake

-Email PM user with daily summary, to include;

-Number of completed letters

-Number of uncompleted letters

-List of uncompleted letter by email and name fields

-Email non completed letter requests to recipients (every 24 hours until letter completed)

*Cart*

*-8 different levels of products, fixed price for each product-only difference between them is the maximum number of recipient email address they can have in the project manager ie 0-10 address emails=free, 11-50 address emails=$XX etc etc.*

*User Types*

*Project Managers*

*-Sets up the project and has rights to all functionality. Is the only user who can make changes to the ‘Project Details’ box.*

*Project Assistant Managers*

*-Everything the PM has except changes to the ‘Project Details’ box. Cannot add any type of users.*

*Project Reporting User*

*-Can only use and see the ‘reporting tab’ and see the ‘Project Details’ box.*

*-Cannot see the ‘Project Status’ or add any type of users.*

*-Cannot see or use the ‘Contacts’ or the ‘Submissions’ Tab.*