

## Add company

Company name\*

Professional Pest Management

Status\*

Active

Representative first name\*

Paul

Representative last name\*

Duncan

Email address\*

paul@professionalpestmgmt.com

Phone number\*

+1 9099575910

Address line 1\*

4385 E. Lowell St.

Address line 2

Ste D

City\*

Ontario

State/Province\*

CA

Zip Code\*

Zip Code

Password\*

Password

Password confirmation\*

Confirm password

Add

\*\*\*These fields DO NOT NEED TO BE REQUIRED

#### -Need fields to be intuitive for what's needed:

Example: Insulation is the main one- Job Scope- Remove/Replace, Removal Only, Install Only  
Once selected all things not related to these scopes should be hidden. Email confirmation to rep/office should ONLY show the information relevant to the job.

#### - Need to see how the emails work

- Emails header should be unique as specified in the original agreement it should at the minimum say the date the job is going, the type of work & street address (example: "NEW Insulation booking for 11/15/2020 @ 1234 Main St Riverside")

#### Company Access:

-Need Sub Admin for companies as well so that they can give admins in the office access to book jobs, assign to a sales rep, and also receive the email confirmations.

**Employee Access Rights:** Lead or Service Tech  
Lead has ability to complete a job, upload files, etc.  
Service tech can only see job assigned to them

**Ability to adjust # of appointments each day-** We aren't still clear how this is going to work? Truck feature may not work, we need something different that just shows # of jobs available.

**Rescheduled jobs** go back to the original logic that it needs to be approved, if there's no availability it should show that as well.

**Booking a job:**

When booking a job it forces you to pick an option. Cory needs to walk through so you understand which need to be that way, and which ones don't.

**Managing a job:** Companies or Reps should NOT be allowed to delete any jobs.

**Upload feature for multiple pics** not in there yet.