# Current process

Survey Created

Cost is calculated

Move status changed to “Estimate”

Move status changed to “Pending”

Estimate booked by JK Personnel

Services are scheduled

Move status changed to “Booked”

Currently, move status is updated to Pending Move, when the estimate is selected, and deposit is paid (usually done over call, or via email).

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# Future process

When the app is released, customer will be required to acknowledge the selected estimates via app. This will give us following scenarios to consider:

1. Estimate is selected and deposit is paid. Customer acknowledges the selected estimate without changes.
2. Estimate is selected and deposit is paid. Customer does not acknowledge the selected estimate, or make changes to address, valuation, service dates etc.
3. Estimate is not selected. Customer has to select an estimate, make the deposit payment using app.

Based on our understanding, we will have three different process flows as below. “Estimate review process” is not detailed here.

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## Scenario 1:

Estimate is selected and deposit is paid. Customer acknowledges the selected estimates via app.

Survey Created

Cost is calculated

Move status changed to “Estimate”

Move status changed to “Ordered”

Estimate booked by JK Personnel

Services are scheduled

Move status changed to “Booked”

Customer acknowledges the estimate without changes using App

Move status changed to “Pending”

In this case, items marked as green is the difference from current manual process.

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## Scenario 2:

Estimate is selected and deposit is paid. Customer does not acknowledge the selected estimate, or make changes to address, valuation, service dates etc.

Updates provided for Services

Manual Process 1

Manual Process 2

No

Yes

Survey Created

Cost is calculated

Move status changed to “Estimate”

Move status changed to “Ordered”

Estimate booked by JK Personnel

Customer reviews estimate

Move status unchanged. Alert sent to coordinator

Manual Process 2

Move status changed to “Estimate”

Coordinator creates new estimate

Services are scheduled

Move status changed to “Booked”

Coordinator approves changes

Move status changed to “Pending”

Manual Process 1

In this scenario, when customer provides updates move status is unchanged, and an alert is sent to move coordinator. Move coordinator then gets in touch with customer and manually updates the status to “Pending”.

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## Scenario 3:

Estimate is not selected. Customer has to select an estimate, make the deposit payment using app.

Move status changed to “Booked”

Move status changed to “Pending”

Manual Process 1

Services are scheduled

Coordinator approves changes

Manual Process 1

Survey Created

Cost is calculated

Move status changed to “Estimate”

Move status changed to “Ordered”. Alert sent to coordinator.

Customer selects estimate, and make a deposit using App

In this scenario, since user is already selecting the estimate and acknowledging at the same time, coordinator can approve selection and update status to “Pending”. There is no requirement for customer to provide acknowledgement a second time.