title: "Use Case: Geo-Tagged Service Completion Workflow"

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Use Case: Geo-Tagged Service Completion Workflow

Document Type & Naming

This document is a **Use Case** (also known as a **Feature Use Case** or **User Story**). Use cases are standard practice for capturing how a system's features support real-world workflows, detailing actors, preconditions, and step-by-step flows to illustrate value.

Purpose

To demonstrate how **Skyesoft** streamlines on-site service close-out, enforces quality through geo-tagging, and maintains accountability—ultimately delivering superior customer service and embodying Stephen Covey's **Habit 7: Sharpen the Saw**.

Actors & Roles

- **Receptionist**: Receives customer calls and views order status.
- **Install Crew**: Executes on-site work and interacts with the mobile app.
- **Install Manager**: Oversees crew activities and reviews completion.
- **Account Representative**: Monitors orders, communicates with the customer.

Preconditions

1. Order "Patch & Paint Wall" is created in Skyesoft and tagged **Completion Photos Required**.
2. Site coordinates geo-fence defined for the location (e.g., 10411 N 35th Ave).
3. Crew has company-issued mobile device with Skyesoft mobile app.

Main Flow

1. **Crew Arrival & Geo-Check**: When the crew reaches the site, their phone's GPS triggers a check-in—Skyesoft marks them **On Site** only within the geo-fence radius.
2. **Perform Work**: Crew patches and paints the wall according to the order scope.
3. **Request to Leave Protocol**:
   - Crew remains geo-tagged inside the boundary until all tasks complete.
   - Tapping **Request to Leave** outside the fence without approval triggers an alert.
4. **Photo Verification**:
   - Crew uploads timestamped photos of the completed patch and paint.
   - Skyesoft flags these for review by the Install Manager.
5. **Automated Alerts**:
   - If the crew exits early, Skyesoft alerts the Install Manager and Account Rep via in-app and SMS notifications.
6. **Manager & Rep Review**:
   - Install Manager approves photos or requests corrections.
   - Account Representative can join the in-order chat to add notes or confirmations.
7. **Order Close-Out & Customer Communication**:
   - Upon approval, Skyesoft emails completion photos to the customer in real time.
   - Order status changes to **Closed**.

Features Highlighted

- **Real-Time Location Tracking** via geo-fencing
- **Controlled Exit Protocol** to enforce completion
- **Photo-Verified Close-Out** workflow
- **In-App Chat & Alerts** for seamless collaboration
- **Automated Customer Notifications** for instant confirmation

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Covey Habit 7: Sharpen the Saw

This use case embodies continuous improvement by:

- **Streamlining Processes**: Automates manual follow-ups and reduces re-work.
- **Enhancing Accountability**: Geo-tagging and exit protocols prevent service gaps.
- **Empowering Teams**: Provides clear, data-driven steps and collaboration tools.
- **Renewing Workflows**: Transforms paper-based close-out into agile, digital protocols.

By constantly refining these workflows and leveraging technology, Skyesoft keeps the organization—and its people—sharpened for long-term excellence.