SUMMARY OF REQUIREMENTS

We are a service-based business that creates marketable floor plans for real estate clients. When an order is placed by our clientele (usually real estate agents), it is for a particular property address and we set an appointment and go to the property and create survey drawings and then days later deliver our clean, finalized drawings electronically (via email attachment) to our clients for use on clients' websites and print material. We usually receive between 10-30 orders per day and turnaround for an order from inception (the day an order is placed on our website) to final delivery to client is usually 5-10 days. We have admin staff that facilitate and track these orders, on-site technicians, marketing team that create the final product and managers for each team.

We are looking for a CRM and Order system to:

- Input, review and edit new and existing orders
- Track due dates and phases
- Maintain our client contact information and preferences
- Maintain our job-site-technician (we call them Surveyors) contact information and scheduling preferences
- Track on-site appointments and technicians performing the appointments (calendar works best)
- Track phases/status of all open and completed jobs
- Track basic financial data on sales for admin role online
- Different internal user access levels and sign ins to enable access and restrictions within the CRM to various data (no access to certain data, read-only access to other data and write access to other data).
- Dashboard view for a quick view customized per user role (what we can see on the dashboard should relate to the various user restriction levels)
- Send confirmation of order with details to client (auto-generated email but we manually hit send)
- Send instructions of order to our surveyors (auto-generated email but we manually hit send)
- Notification of new order to our design team (auto-generated email)
- Autofeed information into the system from our online order requests (on our website on squarespace)
- Autofeed orders and leads from the system into Quickbooks online

THE FIELDS WITHIN NEW ORDER/NEW PROJECT

- Every order gets a unique Invoice Number: Autogenerated Number
- Every order needs to belong to either: FloorPlanVisuals or FPVimages (floorplanvisuals should be default which fpvimages as a second option in a dropdown menu or in a checkbox)
- Every order will have a client name field which will pull in client profile information into each order

Client Info:
The following information from a client's profile will carry over to all new orders placed for the client however all fields should be 'overwriteable' when you are within a new Order (or project) and if overwritten, it should be asked if this should overwrite Client profile information or applies only to this order. The client profile fields:
- Agent or Owner First Name:
- Agent or Owner Last Name
- Company
- Email
- Phone: should be able to handle multiple phone numbers along will allowing for text labels (cell, assistant, samantha, office, etc)
- POC First Name
- POC Last Name
- POC Relationship
- Client Preferences
- Referred By
- Payment Info: protected field for cc info input (free fill text field)

Property Info:
These fields will not carry over to other orders but is order specific. This is a very important identifier for the order as we consider an order
- Address
- City
- State
- Zip
- Approx Total Sq Ft: dropdown list which will trigger a related cost

Survey Info:
- Number of Units Surveying: dropdown 1, 2, 3, 4, custom (text field) and approx size of unit
  If More than 1:
    - Number of Units in Building/Complex
    - Surveying entire building/property or select units: dropdown with those two options
    - Number of Non-Residential Units Surveying

- Total Sq Ft of Non-Residential Units: dropdown list which will trigger a related cost
- Number of Residential Units Surveying
- Approx Sq Ft of Each Residential Unit Surveying: dropdown list which will trigger a related cost per unit

- Building Type: dropdown with single-family, multi-family, commercial, commercial/residential mix, industrial/warehouse only (this will also be combined with sq ft fields to trigger cost of plans)

<u>On-site survey Instructions</u>:
- unit access information
- additional survey instructions
- time allocation

<u>Appointment Info</u>:
- Order Date: should be defaulted to the day the order is entered but should have a calendar to select dates from
- Appointment Date: calendar dropdown to select a date
- Appointment Time: Manual input
- Surveyor Name:: dropdown list containing our current surveyors names for selection
- 2nd Appointment Date: field should be minimized, if anything is input into this field, this field should supercede the above original appointment date when it comes to notifications to parties involved (surveyor, client, etc).
- 2nd Appointment Time: same preferences as for 2nd appt date
- Surveyor: dropdown and same preferences as for 2nd appt date
- A calendar to track all appointments and filterable/searchable by surveyor name, dates, property address

<u>Cost Info</u>:
- Cost Field: this will be the cost of the floor plans and will be autocalculated based on square footage fields
- Extra Services: this will be autocalculated and will be the total cost of the Add-on services selected (such as square footage calculation, Furniture, etc - there are probably 20-40 add-on services and multiple can be selected at one time).
- *Two blank fields:* the first blank field is a description field (I will enter text into here, such as - 'travel' or 'custom services' - make this field long enough to write a sentence if i need to) and right next to the description field will be the second blank field which will allow me to enter a monetary figure (including pennies - $0000.00).
- *One more line with two blank fields*, same as described above
- Total Due: this will add up the totals from Cost, Extra Services and from the blank fields (if possible).

** calculating amounts is a desired ability, not an absolute requirement

Expenses:

All fields should be hidden and appear only when maximized or triggered.

- Two blank fields: the first blank field is a description field (I will enter text into here, such as - 'travel costs' or 'gas used' - make this field long enough to write a sentence if i need to) and right next to the description field will be the second blank field which will allow me to enter a monetary figure (including pennies - $0000.00).
- One more line of two blank fields, the same as described above.
- Total Expenses: this field will add up the totals from the two above Expenses fields
- Adjusted Total: it will subtract the field Total Expenses from Total Due. Make this field editable.

Scope:

These will be checkbox or multiple-choose dropdown items but will have a free-fill cost box next to each and some will have a third box for textual input as well. Each item should have an optional checkbox or some other way to notate that add-on/preference will carry over to all future orders for the client. When checked, the items will also trigger an associated cost that will appear in the cost box. Should be noted as For all Orders or maybe two boxes that say For this order only and For all Orders. Please note the ability to autocalculate items is NOT mandatory, it is just a desired feature.

From On-Site Survey (subsection header):
- Floor Plans
- Exterior yes or no (selection)
- As-Builts - room dimensions, door/window widths&heights, scaled to ¼” or ⅛” on arch sheet size: it should include all that text
- 2D b&w Exterior Elevation Drawings Quantity 4 (one building)
- 2D b&w Exterior Elevation Drawings Quantity for other than 4: text box
- Building Sections (should also contain a text box to explain the building sections)
- Roof Plan
- Interior Elevation Drawings: big text box allowing up to 2 lines of text
- Add’l Survey Instructions

In-House (subsection header):
- Square Footage Calculation Add-On
- Building Gross Sq Ft Calculation Add-on
- Per Unit Sq Ft Calculation Add-on - for Commercial
- Exterior Add-on
- Site Plan: this will have the cost box but will also
  If selected:
    - Lot Features: big text box allowing about 3 lines of text
- Pool: desirable if when checked will feed cost into Site Plan/exterior cost box (whichever is checked off)
- Sports Court: desirable if when checked will feed cost into Site Plan cost box/exterior cost box (whichever is checked off)

- Waterfront: desirable if when checked will feed cost into Site Plan cost box/exterior cost box (whichever is checked off)
- Furniture Add-on
- Travel
- Sq Ft Take Off Only
- CAD File Release
- 3D Ext Rendering
- 3D Int Rendering
- Fly-Over Animation
-Walk-Thru Animation
- No Add-ons Needed: this will be a checkmark like the rest but won't need cost or text box. It will still need the option to carry this preference over to all orders for the client.

Post-Appointment:
- Delivery Date: calendar
- Invoice Date: calendar
- Actual Total Sq Ft: manual input
- Survey Quality:

Show only when triggered or for certain logins:
- Paid: Yes/No dropdown
- Date Paid: calendar
- Payment Method: dropdown with credit card (default), check, paypal, other
- Payment Notes: Up to 5 lines of text
- Last Four of CC Used:
- Amount Paid
- Allocated Time: will need to pull this info into surveyor confirmation email
- In and Out Times:
- Amount Pd to Surveyor
- Surveyor Paid: Yes or No dropdown
- Important Comments: Up to 7 lines of text

Notes from Zeynep on Fields they Need Must Add to Fields Doc:
We need surveyor name in the DB for each project as well.
- We'd need all of the sections in our current log. I couldn't see "Notes" and "PA notes" among your notes. We definetely need those.
- We normally list only the NEW projects and revisions with costs in the log since only they are in the DB. So we'd need some sort of a regular revision date and hours and PA information somewhere. Maybe the ones you mention are covering the items that I'm talking about. But I have no idea what the new interface would look like so it'd be good to receive more information. Is it a new system which is getting designed for us just like the current DB? What will the interface be like? Will it be more like google sheets or the DB?

- Will I be able to move and arrange projects in this system? Because I normally do that daily in order to have as many projects as possible completed. PAs don't just start the next project all the time during the heavy season.
- It'd be good we can keep the same order for the invoice number, address, details etc as the current log.

Designer Fields:
- Due Date: calendar date
- Designer: It will be a dropdown field just like surveyors (please provide the ability for us to add new designers to this dropdown list.
- PA Completion Date: calendar date
- PA Total Time Spent:
- Revision Request Date
- Revision Completion Date
- Revision Delivery Date
- Project Notes: up to 5 lines of text

STATUSES/PHASES

We need easy ability to see status or phase of an order, this is another primary function of this CRM. The status should also contain the date that the current status was achieved. I prefer these phases/statuses be easily available on our dashboard and I have put them in order of what needs to be most prominent to lease prominent. The below are the phases and they are in chronological order however selection of more than one Phase should be allowable.

1. Pending Survey (when new order date has been generated)
2. In Survey (appt/survey date)
3. Ready For Design Team (when the Appointment date has come/passed)
4. With PA (manual selection of phase)
5. Ready for QC (manual selection of phase)
6. With DTM (manual selection of phase)
7. Finalized Ready to Invoice (manual selection of phase)
8. Invoiced Ready to Charge & Deliver (manual selection of phase)
9. Ready to Deliver (manual selection of phase)
10. Pending Payment
11. Finalized and Closed (manual selection of phase)
12. Revision Ready for Design Team (manual selection of phase)
13. Revision with DT (manual selection of phase)
14. Finalized Revision Ready to Invoice (manual selection of phase)
15. Revision Ready to Charge & Deliver (manual selection of phase)
16. Revision Finalized and Closed (manual selection of phase)
17. Pending Client Feedback (manual selection of phase)
18. Surveyor Paid

CAPABILITIES POSSIBLY NOT DESCRIBED IN THE FIELDS ABOVE

- Entering new orders (can add a new client within a new order if the order is for a new client)
- Add new surveyors and their contact info and edit existing ones
- Adding new clients and their contact info and edit existing ones
- Invoicing and Adding/Revising/Deleting pricing brackets
- Search within all fields (for a particular order or all order that fall within certain criteria - basically a report feature)
- Reporting
- Allow pennies (doesn't round)
- Sort, filter and group information utilizing any/all fields
- calculate total sales $$ per month or per filter/sort
- calculate total number of orders placed per month or per filter/sort
- Autogenerated emails with order details including pricing to clients but first allow review and editing of autocompiled info before sending
- Autogenerated emails with appt details including time allocations to surveyors but first allow review and editing of autocompiled info before sending
- Downloading for archiving system
- Time allocation fields need to be able to contain two decimal places (2.25hrs)
- Connecting the system to our website order page (we use squarespace)
- Converting Lead to Order

<u>Some of the Capabilities Explained:</u>
Capability: New Order
New Order - this will be the most prominent (centered, bolded or a bigger button, etc, some way to distinguish this feature). Selecting this feature will show predefined fields and options (we can provide a sample of these fields but already described above).

Capability: Search
Search - will be 2nd most used feature. Selecting this feature will allow searching among any of the fields:

Capability: Outstanding Invoices
This will be a report that shows only outstanding invoices and will be used extensively by our bookkeeper to make sure there are no outstanding invoices since the beginning of time. (Basically Invoice date contains a date that is not 00000s and Got Paid is No). **Our preference is that this system links with Quickbooks.**

Capability: New Surveyor

New Surveyor should be a very small button/link, etc, since adding a new surveyor occurs only once a month at most. Selecting this feature will show the same fields and options as currently shown in Add Surveyor.

Capability: Payroll
There will also need to be a Payroll button. This will show a filtered view of certain fields in an order:

Property Address
Appointment Date
Total Square Footage
Comments
Private Comments
Surveyor Name
Surveyor Paid
Amount Paid Surveyor

- Auto-paystubs. Just like the confirmation emails are autofilled, I need a paystub template or I can provide my own (which contains a table with rows for line items) and some or all of the fields will be autofilled using fields from the CRM when a certain status is achieved in an order?
- Auto-invoicing. Can fields autofill QB invoices?
- Can notification emails be autogenerated and sent to specific email addresses when a new order is entered or when data is updated in certain fields and 'saved' in an order?

Leads
Tracking of new leads, which contain the same fields as entering new orders, except:

- The $$ fields from the new lead cannot to be counted into the total monthly tally of revenue (since it is a lead only and the Lead $$ field will only contain a price QUOTE and won't be revenue for us).
- The $$ field from the new lead cannot be counted in the total number of orders tally since again it is only a lead and not an order.
- The identifier will be Lead rather than Order so that we can use reporting functionality

The Different User Accesses and Dashboard Views

ADMINISTRATOR

DASHBOARD/PRIMARY NEEDS
Administrator will have access to everything and to each user's dashboard.

Search Bar
It will be searchable by
- Property address
- Client name
- Surveyor name
- Status

Open Orders
This will show a list of all orders that are not in status "finalized and closed"
The fields visible from an order on this list will be:
- Address
- Surveyor
- Appt date
- Order date
- Status

Outstanding Invoices
This will show a list of all orders that are in status Pending Payment.
The fields visible from an order on this list will be:
- Client Name
- Address
- Appt date
- Order date
- Finalized date
- Status

Reports
This should allow population of a collection of data in an easy to read report format. It should:
- allow export of data
- allow reporting daily, monthly, annually, custom timeframe for any report
- Allow reporting across any fields contained within an order
- Allow reporting across any fields contained within a client profile
- Allow report containing Staff Data
- Staff Productivity
- Staff Time Off
- Revenue

- Number of Orders
- Client Reporting
- Types of orders placed
- Status
- Provide number calculations. For example, by searching for a particular client, all orders should populate but the following figures should also be tallied in the search result:
    - Total revenue
    - Uncollected revenue (overdue payments)
    - Open order revenue
    - Total number of orders populated

Deliveries

This will show a list of all orders that are in the following statuses:

- Finalized Ready to Invoice (manual selection of phase)
- Invoiced Ready to Charge & Deliver (manual selection of phase)
- Ready to Deliver (manual selection of phase)
- Finalized Revision Ready to Invoice (manual selection of phase)

The fields visible from an order on this list will be:

- Address
- Appt Date
- Order Date
- DT Completion Date
- Status

SECONDARY ITEMS

Enter New Order

Should be a button or some other easily distinguishable feature.

Client Contact/Profile Information

It will contain all client profile data. It should possess:

- Adding New client
- Editing existing client information
- Viewing all orders for client
- It should not allow deletion of a client or modification of a client's name.

Surveyor Profile Information

It will contain all surveyor profile data. It should possess:

- Adding New surveyor
- Editing existing surveyor information
- Viewing all appts for surveyor

- Should not allow deletion of a surveyor or modification of surveyor name

Wishlist: Managing Scheduling

This should allow viewing of each staff members timeclock inputs as follows:

- Viewing, adding and modifying current clock status (clocked-in, clocked-out etc)
- Viewing, adding and modifying clock status for a particular date or date range
- Ability to create entry for any user for upcoming prescheduled time off.
- Ability to add notes to days for any user
- Track time worked and time taken off
- Search and filter by timeclock inputs for particular users or all users for periods of one day, a month, a year or a custom timeframe
- Search and filter by surveyor appt calendar inputs for particular surveyors or all surveyors for periods of one day, a month, a year or a custom timeframe

Payroll & Invoicing

There will also need to be a Payroll view and creation capability. This will show a filtered view of certain fields in an order:

- Property Address
- Appointment Date
- Total Square Footage
- Comments
- Private Comments
- Surveyor Name
- Surveyor Paid
- Amount Paid Surveyor

Auto-paystubs

Just like the confirmation emails are autofilled, I need a paystub template or I can provide my own (which contains a table with rows for line items) and some or all of the fields will be autofilled using fields from the CRM when an order status is Finalized and Closed:

Auto-invoicing

Certain fields autofill QB invoices

Notification Emails Autogenerated

Email notification sent to specific users when a new order is entered or when data is updated in certain fields and 'saved' in an order

Forms and Policies

This area will contain documents, manuals, policies etc. It should allow:

- Attachments
- Data entry (can it sync with Google Docs or some other way to enter data in here rather than creating attachments)
- Sharing with other staff members

CLIENT SERVICES MANAGER

DASHBOARD/PRIMARY NEEDS
Each CSM should have their own user login.

Enter New Order
Most prominent need, should be a button or some other easily distinguishable feature

Search Bar
It will be searchable by
- Property address
- Client name
- Surveyor name
- Status

Open Orders
This will show a list of all orders that are not in status “finalized and closed”
The fields visible from an order on this list will be:
- Address
- Surveyor
- Appt date
- Order date
- Status

Deliveries
This will show a list of all orders that are in the following statuses:
- Ready to Invoice (manual selection of phase)
- Invoiced Ready to Charge & Deliver (manual selection of phase)
- Ready to Deliver (manual selection of phase)
- Revision Ready to Invoice (manual selection of phase)

The fields visible from an order on this list will be:
- Address
- Appt Date
- Order Date
- DT Completion Date
- Status

Calendar
This will show a calendar that will default to show all appointments, past or present. Past appointments will be greyed out.
It should be filterable by:
- address
- surveyor name

- filtre should be defaulted to present and future appointments but it should contain the ability to search for past appointments.

Wishlist: Logging Time and Managing Scheduling

Timeclock which will be a clock in/out button on dashboard that when clicked, will:

- Allow user to select:
    - Clock In
    - Start Break
    - End Break
    - Start Lunch Break
    - End Lunch Break
    - Clock Out
- It will clock their time automatically using real time based on computer timeclock or some other method

Secondary (on a sidebar):

Viewing their clock-in and outs.

Ability to create entry for prescheduled time off.

Ability to add notes to days i.e., “I was late this day because my son was ill.”

SECONDARY ITEMS

Client Contact/Profile Information

It will contain all client profile data. It should possess:

- Adding New client
- Editing existing client information
- Viewing all orders for client
- It should not allow deletion of a client or modification of a client’s name.

Surveyor Profile Information

It will contain all surveyor profile data. It should possess:

- Adding New surveyor
- Editing existing surveyor information
- Viewing all appts for surveyor
- Should not allow deletion of a surveyor or modification of surveyor name

CSM LIMITATIONS

The elements/fields within an order that a CSM can access are limited as follows:

No Access:

- Any monetary calculations (for example, they can do a search for a particular client's orders and see all 100 orders for that client. They will even be able to see how much we charged for each order if they click into the order but in their broad view, when 100 orders are populated, nothing should total up the total dollar cost).

Wish List: Additional Capabilities We Wish for CSM To Have:

- Send emails to clients from within an Order but to show our company gmail address
- Export an email from our company gmail and import it into an Order easily

The Different User Accesses and Dashboards

DESIGN TEAM MANAGER

DASHBOARD/PRIMARY NEEDS
The Design Team Manager should have its own user login.

DT Projects
This will show a list of all orders that are the following statuses:
- Ready For Design Team
- With PA
- Ready for QC
- With DTM)
- Revision Ready for Design Team
- Revision with DT

The fields visible from an order on this list will be:
- Type
- Scope
- Address
- Appt Date
- Deadline
- PA
- Status

Open Projects
This will show a list of all new orders that are not in the below status:
- Finalized and Closed
- Revision Finalized and Closed

The fields visible from an order on this list will be:
- Type
- Scope
- Address
- Appt Date
- Deadline

3D Open Orders
This will show a list of all new orders that Scope contains at least: 3D and are not in the below status:
- Finalized and Closed
- Revision Finalized and Closed

The fields visible from an order on this list will be:
- Type

- Scope
- Address
- Appt Date
- Deadline
- Status

Calendar

Will show a calendar with all design team member projects by date, should be filterable by address or PA. It will also show if a PA is out for the day and company holidays.

Wishlist: Logging Time and Managing Scheduling

Timeclock which will be a clock in/out button on dashboard that when clicked, will:

- Allow user to select:
    - Clock In
    - Start Break
    - End Break
    - Start Lunch Break
    - End Lunch Break
    - Clock Out
- It will clock their time automatically using real time based on computer timeclock or some other method

Secondary (on a sidebar):

Viewing their clock-in and outs.

Ability to create entry for prescheduled time off.

Ability to add notes to days i.e., “I was late this day because my son was ill.”

SECONDARY ITEMS

Client Contact/Profile Information

It will allow view-only access. It will contain a search bar only that will allow a search for client name. It should allow:

- Viewing client profile data
- Viewing particular orders for client (user will need to select one of the orders that populate rather than it showing a list of all orders that populate)
- Ability to copy data onto clipboard to paste elsewhere

Design Team Member Contact/Profile Information

This will contain all current design team members information. It should allow:

- Viewing DT member profile data
- Editing profile data
- A free-text box for comments

- Contain access to calendar entries for that member
- Contain access to timeclock entries for that member

Forms and Policies

This area will contain documents, manuals, policies etc. It should allow:

- Attachments
- Data entry (can it sync with Google Docs or some other way to enter data in here rather than creating attachments)

Report

This should allow population of data generated from within an order in the area called Design Team Fields so that we can assess productivity as well as types of work completed, etc, so it will allow cross reporting on a particular design team member for different items such as:

- PA Completion Date: calendar date
- PA Total Time Spent:
- Revision Completion Date

PROJECT ARCHITECT

DASHBOARD/PRIMARY NEEDS
Each Project Architect should have their own user login.

My Projects
This will show a list of all Open orders that are assigned to the user (when the field entitled Designer within an order contains this user's name).
The fields visible from an order on this list will be:
- Type
- Scope
- Address
- Appt Date
- Deadline
- Status

DT Projects
This will show a list of all orders that are the following statuses:
- Ready For Design Team
- With PA
- Ready for QC
- With DTM)
- Revision Ready for Design Team
- Revision with DT

The fields visible from an order on this list will be:
- Type
- Scope
- Address
- Appt Date
- Deadline
- PA
- Status

Calendar
Will show a calendar with all design team member projects by date, should be filterable by address or PA. It will also show if a PA is out for the day and company holidays.

Wishlist: Logging Time and Managing Scheduling
Timeclock which will be a clock in/out button on dashboard that when clicked, will:
- Allow user to select:
    - Clock In
    - Start Break

    - End Break
    - Start Lunch Break
    - End Lunch Break
    - Clock Out
- It will clock their time automatically using real time based on computer timeclock or some other method

Secondary (on a sidebar):
Viewing their clock-in and outs.
Ability to create entry for prescheduled time off.
Ability to add notes to days i.e., “I was late this day because my son was ill.”

SECONDARY ITEMS

Client Contact/Profile Information

It will allow view-only access. It will contain a search bar only that will allow a search for client name. It should allow:

- Viewing client profile data
- Viewing particular orders for client (user will need to select one of the orders that populate rather than it showing a list of all orders that populate)
- Ability to copy data onto clipboard to paste elsewhere

Forms and Policies

This area will contain documents, manuals, policies etc. It should allow:

- Attachments
- Data entry (can it sync with Google Docs or some other way to enter data in here rather than creating attachments)

3D VISUALIZATION EXPERT

DASHBOARD/PRIMARY NEEDS

The 3D Team should have their own user login.

3D Open Orders

This will show a list of all new orders that Scope contains at least: 3D and are not in the below status:

- Finalized and Closed
- Revision Finalized and Closed

The fields visible from an order on this list will be:

- Type
- Scope
- Address
- Appt Date
- Deadline
- Status

SECONDARY NEEDS

Wishlist: Logging Time and Managing Scheduling

Timeclock which will be a clock in/out button on dashboard that when clicked, will:

- Allow user to select:
    - Clock In
    - Start Break
    - End Break
    - Start Lunch Break
    - End Lunch Break
    - Clock Out
- It will clock their time automatically using real time based on computer timeclock or some other method

Secondary (on a sidebar):

Viewing their clock-in and outs.

Ability to create entry for prescheduled time off.

Ability to add notes to days i.e., “I was late this day because my son was ill.”

BUILDING SURVEYOR

DASHBOARD/PRIMARY NEEDS

Each Surveyor should have their own user login. They will have very limited functionality.

Calendar

- The user will see a calendar with their own appointments only, past, present and future

Open Appointments

This will show a list of all orders that are in status Pending Survey or In Survey.
The fields visible from an order on this list will be:

- Property Info
- Survey Info
- Additional Survey Instructions
- Appointment Date
- Appointment Time
- From On-Site Survey (subsection of Scope)

Survey Drawings Due

This will show a list of all orders that are in status Ready for Design Team.
The fields visible from an order on this list will be:

- Property Info
- Survey Info
- Additional Survey Instructions
- Appointment Date
- Appointment Time
- From On-Site Survey (subsection of Scope)

Surveys Pending Payment

This will show a list of all orders that are in or after status Finalized and Closed but before status Surveyor Paid.

Finalized and Closed

This will show a list of all orders that are in status Surveyor Paid.
The fields visible from an order on this list will be:

- Actual Total Sq Ft
- Survey Quality
- Allocated Time
- In and out Times
- Amount Pd to Surveyor
- Surveyor Pd

SECONDARY NEEDS

Wishlist: Logging Time and Managing Scheduling

This user is always on the field. It would be desirable if they could access at least the timeclock from the field. Timeclock which will be a clock in/out button on dashboard that when clicked, will:

- Allow user to select:
    - Clock In
    - Start Break
    - End Break
    - Start Lunch Break
    - End Lunch Break
    - Clock Out
- It will clock their time automatically using real time based on computer timeclock or some other method

Secondary (on a sidebar):

Viewing their clock-in and outs.

Ability to create entry for prescheduled time off.

Ability to add notes to days i.e., “I was late this day because my son was ill.”