Queries...

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* ***How will we manage contracted jobs?*** *(Doc attached to explain process)* Currently we generate them through the system, they sit in the “Contracted Not Booked” column until we book them to an available day in the month they are due. The confirmation generates which we send via “delayed message” in Outlook as they go out 2 weeks prior. The procedure is attached.   
  - Generate job based on cycle. Auto-generate email 14 days prior to job date to confirm job.   
  - So if a job is booked in on the 3rd of the month and it is on a 30 day contract, then book it in again for the next month on the 3rd, unless it is the weekend and then make it the next available day.

We will create a scheduler that will run on every hour and check whether any contracted job is due. If scheduler found any contracted job due then a mail will be generated for the respective client for confirmation. If he confirmed the mail then a new job will be created and booked for the date based on the contracted cycle. We will also consider that job will be not booked for Saturday or Sunday.

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* ***Reminders – how will we generate these?*** Attached is the reminder procedure as well.    
  - Select date range, send reminders.   
  - Offer sales / discounts. Ability to edit template.

We’ll create new screen where we can create reminders. Also, while creating reminders need to save that entry into respective customer contact log.

Preview template option will be available while creating reminder.

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* ***How will temporary roster changes be managed so they don’t show up on the Operations Screen?*** Ie, an OTRW wants to work a day he is usually off in lieu of another day.   
  - Can we add a one off work day?   
  - Setup work days for fortnight period. Some OTRW work 2 days one week and 3 the next. Others might have 1 day off each fortnight, need to set that up.    
  - If day off/holiday, then gray them out in schedule.

If user start any job on Friday and he wants to continue that job in next working day then he needs to follow below points:

1. Start job on Friday.
2. Pause the job before leaving.
3. Restart job on Monday.

On calendar two events of the same job will show one on Friday and one on Monday.

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* ***Management of company vehicles.*** Will these be entered into Stock or somewhere else?   
  - Make a new section for Assets. Then assign that asset to OTRW.

We will create a separate page for Asset where admin can add vehicles. A vehicle dropdown will be available in the employee section so that admin can assign a vehicle to the OTRW User.

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* ***Where will we specify the job type per OTRW?*** Ie, gutter cleaner or Roofer.   
  - Add this in profile

- Need ability to override if OTRW not quailed for work type. For example an OTRW is qualified only for roof cleans and someone tries to assign OTRW roof repair, should show an error. If this is attempted by the operations user then automatically allow it.

We have already added work type while adding a new job. We will also add this under the employee profile screen, So that we can easily compare it while assigning job to OTRW.

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* ***Rate equations for bonus figures, where are these entered?*** These categories are also directly related to the pay rates. They change from time to time when our overheads go up or the LP/HR goes up.   
  - Only accessed by Ops and Matt.

We already created a Rate screen, Also a category sheet of labour is shared by you. So please explain which information we need to include in this screen?

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* **How will the task function work?**

- Just via messaging for internal staff / admin etc  
- Need to be able to add tasks for OTRW that are NOT assigned to a job. For example pickup stock, pickup a ladder. OR Office meeting. This needs to show in the schedule, especially staff meetings etc.

Please provide us the complete flow of task function?

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* **How will notifications work?**
* - Currently it shows the last few actions.   
  - Need to be able to see full log of notifications, need to see full history. Needs to say for example WHO created or saved the invoice.

We will provide the view history button on the notification popup. So the user can see the history of the notifications.

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* ***How does the weekly view work when assigning jobs on the operations screen?*** We cannot see much detail.
* - Select week, then select day.   
    - Need to be able to drag a job from another day to current day and vice versa.

Under week view OTRW list is not available so assignment cannot possible in this. It will only be possible to change the day of job in week view. But if there are 50 jobs on the same day, on the same time. It will become congested and difficult to identify the specific job to change the day booked.

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**Timesheets / Jobs . Invoicing...**   
- Can we setup geofence for job of 50 metres. So when the OTRW arrived at the job then automatically “clock on” and start time for that job, if they leave the geofence then “clock off” that job. That way the full day will easily distinguish between on a job and travel time.   
Suppose if OTRW reaches within the coverage area and job started automatically. But due to some reason he is not able to start the job. So how can get the actual hours spent on the job?

Within the coverage area if he has two jobs then how come system knows which job to start?

* - All time needs to be saved into the timesheet

ok

* - Time does NOT need to be added to the invoice. Invoice amounts / quantities ONLY come from the quote.
* ok

**Invoices...**  
- Ability to mark invoices as paid and how. Save date etc.   
- Attached is a document explaining the process for Invoicing in RIJO now.   
- More feedback about the invoicing system will be sent soon.

Waiting for the feedbacks.

              **Contact Log...**  
                  - Needs to show all actions and contact regarding client. So if a quote, then show “quote #115” created by User, then hyperlink to that quote. Same for jobs, invoices, messages etc.

Ok.

               **Quotes...**  
                  -What to do in the instance of a partial quote being accepted? Needs to be able to keep record of old quote, but also accepted / edited quote. For example a quote might be created for 3 roof tile options, but they only want 1, they accept the quote for 1, need to still save the old quote but have a modified and approved version.

We need flow of this with markups ?   
  
**Jobs...**  
                - Need to be able to extend jobs, maybe into next day, possibly for even multiple OTRW. So if a job is NOT marked as complete then move it back to “booked” for the next day so that Operations manager can allocate to OTRW again.

At the end of the day user can pause the job and restart the job again on the next day. And if that OTRW is not available for next day then operation manager can change the OTRW assignment.

                - OTRW might possibly work a job that does not get finished and then need to go en-route to another quick job to finish the day. So they need option to leave a job as above and go to next job.

OTRW user can pause one job and start another.

                - How will this effect the geofence? For example if on a job then you leave the geofence, it needs to stop counting time on that job. Then kick of travel time if headed to next job, or if not en route to next job then prompt... is this personal time? Yes / No.

When OTRW leaves the site then how system will know that job is completed or still in in-progress state.

As per your suggestion we need to show pop up here.

And if OTRW going to his home how system will know that it is travel time for job or something else.

So again we need to show pop up here.

So for every action we are showing popup so its better that OTRW manually punch his time.

Concerns:

1. If there are more jobs within the same coverage area.

OTRW user leaves geofence and entering again into the geofence how system will know which job to start. We could start by job start time but suppose if jobs are delayed/overdue then.

If user want to start other job on the same area by suspending first job due to some reason. How system will manage this scenario.

1. How system will manage if OTRW enters into the other jobs coverage area by some reason.

Suggestions:

1. User only able to start his job within the site coverage area and a prompt will automatically display to start jobs which are under that site coverage area.
2. Once he leaves the coverage area job will automatically come to pause state if it is not marked completed by the OTRW user.
3. Then a prompt will display to ask reason? Can select personal time, lunch break, etc.

Example :

1. OTRW user has three jobs within the same cover area.
2. When he enters into the coverage area , a prompt will show up with three job options to start.
3. If user starts job1 and leaves the coverage area after some time, job1 will go to pause state automatically and a prompt will show to select personal time, lunch time etc.
4. When he again enters into the same coverage area, a prompt will come up with three options “resume job1”, “start job2”, “start job3”.

**Dashboard....**  
                - Need to show ALL details in the tile on schedule (NOT just job id). So need to have the suburb, strata number, time of day AND match the colour coding EXACTLY as in RIJO system.

Ok.

                - If you click a day, left panel is ALL assigned jobs in RIJO, right panel is ALL jobs pending for that day only. Then can refine to show all jobs by suburb, type etc.

Ok.

                - When right click on a job it gives an error

Ok. We will fix it.

                - System is slow when double clicking a job.

Ok. We will fix it.

                - If extending a job to a second OTRW, have option in Job description to extend to 2nd worker OR more. Could possibly have a very large job that requires 9 workers.

We will provide a multiselect drop of OTRW users while creating a job.

We have “need two person” option so we can change it to many person or more than one person job.

                - Look at options in RIJO when right click on job. Are there any functions missing in new system?

Extend, call back, NR jobs left. Need more detail as we can’t add/modify your database.

                - Need codes in job tiles, like “Not Early” same as RIJO.

Explain terms “S”, “TRES”, “POS”, “NE”, “4S”

                . Need tabs in right panel like in RIJO that show all standby jobs and total. Does not need CNB (Contract not booked) as these jobs are handled as above and go straight to “booked”. Contracted jobs will automatically go into “booked” tab based on monthly date. Need booked tab, standby.

Please elaborate all tabs.

                - Need undo/redo function on EVERY page. (For if mistake is made)

Only for edit case

                - Need option to delete / reschedule WHOLE day with one click.

In Rijo may be clicked any day on month view to reach specific day view, then right click job to perform actions available to reschedule whole day

Possible cases:

Unbooked Job(s), Booked job(s) for other day, Reassign Job(s) to other OTRW, Make it more than one person job i.e. added more OTRW’s   
                - IF a OTRW is sick for the day, need a option to move all jobs to next day for same OTRW, send SMS notification to all customers for that OTRW for that day.

Ok

In Rijo, right click change date.

We need flow of these. How it will work in our new system.

- When click on a job it is not always showing the job details or the pin on the map. Often it gives an error. This is in google chrome.

Will be fixed.

                - IF OTRW is on holidays, or day off, then make him GRAY for that whole day in the schedule and NOT possible to allocate job to him.IF an OTRW has to start late for the day then gray out the time                     until available, OR if he has a meeting in the office, then gray out that time and no jobs can be booked for that time.

Need to save OTRW all day time and have their respective events to bind them in calendar.

                - Some jobs might have 10 guys, need to be able to handle that in schedule, split job amongst 4. Total hours combine onto 1 job.

ok  
  
                SMS...  
                - SMS Tech is provider  
                - Save ALL SMS’s sent to customer in contact log.