**ADMIN ADMINISTRATOR**

* There will be different levels of administrators. One will be super administrator. Others will be assistant administrators. We will have user access levels. We may want to group features into user access levels that can be enabled or disabled for each assistant administrator, and the Admin can assign user access levels to the assistant administrators. We will probably have a super admin, a technical IT admin, and an accounting admin. We do not want the accounting admin to be able to destroy or sabotage any pre-existing data.
* Each user will have attributes that we set – it may be best to create a profile system for the different users, for example attorneys vs bondsmen.
  + - Set if we charge for individual website or domain name
    - Type of user (Attorney, Bondsmen Etc)
    - Turn on or off features
    - Other attributes?
* Enable or disable user access level
  + Some users will not have accounting functions
  + Some users will not have website CMS functions
* Detailed Statistics for network access.

Accounting

* User management
  + Each user will have a separate account
  + Each user account will have individual cases
* Logable event entries
  + Document upload => MANAGE DOCUMENT
  + Admin receives Customer bill => MANAGE DOCUMENT
  + Admin submits bill to 3rd party (viewable by admin only) => EVENT LOG
  + Admin mails check to Customer => EVENT LOG
  + Admin paid by 3rd party (viewable by admin only) => EVENT LOG
* Accounting function – We want the accounting to help manage us and our customers.
  + Detailed reports
    - By User
    - By Global
      * E.g., all cases where bill is received but not submitted by admin
      * E.g., all cases where bill submitted, but admin not yet paid by 3rd party
      * E.g., all cases with negative or positive balance
  + Keep live track of outstanding payments due from 3rd party with aging
  + Keep live track of cases received but not submitted with aging
  + When customer is paid by Admin, keep track of payment amount
  + When Admin is paid by 3rd party, calculate underpayment, if any
  + If underpayment, account for the underpayment in Customer’s account to be deducted from following payment to Customer
  + Keep track of any money transaction logged for any day or period of time – in order to reconcile with receivables/payables and income.
    - Daily reports
    - Time period reports
* Document management/Case Status
  + Each case should have a case status that is automatically set and editable by Admin – Case status should be color coded to help Admin when viewing all cases. Customer can only see status 1, 2, 3. Customer cannot see 2a, 2b, 2c. The numbers and colors I list below are just examples to help distinguish at this point. We can use whatever we want.
    - 1) Case submitted by customer (PURPLE)
    - 2) Case accepted by CounselEdge (GREEN)
      * 2a) Payment made to customer (YELLOW)
      * 2b) Case submitted to 3rd party (BLUE)
      * 2c) Underpayment by 3rd party (RED)
    - 3) Payment received - case closed (No color)
  + Customer can upload supporting document. Customer can only delete documents uploaded by customer while case is in stage 1, in case they upload bad files, they can correct it.

Website CMS

* Templates should be selectable to be live or inactive, and scalable, so that new ones can be easily uploaded in the future.
* Create/Edit Predefined Main heading Subsets So we can add/edit/activate/deactivate the predefined subsets
  + FAQs
  + Manage Stock photos subset
* There should be a few levels of customer CMS access. Example: Basic, Intermediate, Advanced. This way we can charge 3 different prices depending on what features we provide.

Network

* Create/edit/assign identifiers and sub-identifiers on customers which can be searched on network website
* Search criteria can be enabled or disabled by admin
* Some customers may not want to be on the Network. We should be able to deactivate them on the Network.
* Some users may want to be on the Network only; we should be able to set them up to be on the network only.

Fee Based Services – e.g. fee based individual websites, domain names

* Billing and payment

Advertisement Management

* Manage advertisement space on Network website

**ADMIN CUSTOMER**

Accounting

* No reports for customer. Customer can only see history and money balance.

Website CMS

* Choose/switch global templates
  + Some further flexibility of customization of template, such as color theme, background image.
* Turn on or off and rename predefined pages (Home, About the Firm, Attorney Profile, Practice Areas, FAQ, Contact, Custom1, Custom2, Custom3 …)
  + Add unlimited custom sub-pages under main headings. For example, Practice Areas will have many sub pages where the attorney can describe each area of law he practices on a separate page that is a sub-heading of Practice Areas.
* Control content individually for each page
  + Choose/switch Preselected Stock Photos
  + Upload custom Photos instead of using Stock Photos
  + Add/Delete/Change Text
    - Each text box should be Formattable for a text size/styles
    - On certain pages, either Customer should be able to add unlimited text boxes that format chronologically after the previous text box so that their content is easily formatted, or there should be a WYSIWYG text editor. My experience with WYSIWYG editors is that they are very buggy and the text doesn’t always turn out how you expect. We should discuss this further to decide how best to handle it.
    - Have two versions of text which can be switched back and forth by the user with a button that can be enabled or disabled
* View website usage statistics – Statistics should not be too detailed for customer.
  + Hit counter past 30 days
  + Hit counter past 90 days
  + Hit counter past 180 days
* FAQ Page
  + Ability to enable/disable FAQs
  + Ability to choose from a subset of premade FAQs
  + Ability to add unlimited custom FAQs
  + Ability to change order of FAQs
* Designate unlimited practice fields to appear on individual website.
* Designate 3 or 4 practice fields as top priority practice fields, which will be produce search results for network website.
* Respond and Delete comments
* Choose advanced filters – e.g.: Free Consult, or Choose what counties the professional practice in.

**CUSTOMER WEBSITE**

* ~ 20 templates
* Predefined layout for Home Page, About Page, Attorney Profile, Areas of Practice, Contact, FAQs. Also, Custom1, Custom2, Custom3 layouts which the customer can enter text and upload stock photos as they desire, but cannot modify layout.

**NETWORK WEBSITE**

* First Search Criteria will be top level identifier – Each top level should be able to be active/inactive. Top Level will be set by Global Admin, not professional. Professional can choose unlimited sub level filters for individual website, and limited sub level filters for network portal.
  + TopLevel1 (Attorney for example)
  + TopLevel2 (Private Investigator for example)
  + TopLevel3 (Bail Bondsmen)
  + TopLevel4 (Court Translator)
  + TopLevel5 (Court Reporter)
  + TopLevel6 (Rehab)
  + TopLevel7 (Reserved for future)
  + TopLevel8 (Reserved for future)
* Each top level identifier will have sub identifiers
  + Toplevel1sub1 (Attorney – Criminal for example)
    - Sub identifiers should be editable for name
    - Should be able to add/delete/rename or make inactive sub identifiers
* It would help if the hierarchy is scalable for the future. In the future we will have different types of customers. We may have to make changes, for example split it to Attorney-Criminal-Federal-Drug Crimes, and Attorney-Criminal-State-Drug Crimes. The more flexible you can make it, the better
* Filters on the Network Portal will be smart filters. Only the identifiers that will have search results will be displayed. All others will be hidden until such search results exist.
* Advanced Search filters – These filters should appear once a search is made, to further filter the results:
  + More definite Location (Example: county they practice in)
    - This will be a further filter for the main location which is determined before a search can be made. For example, a public user who searched for an attorney on networkportal.com/nashville, the user can further filter the results by which counties the search results claim they practice in. As a further example, if the search results include only 2 professionals, and those 2 professionals only practice in counties A, C, Y, Z, then the advanced filter will only list those counties.
  + Free consult
  + Possibly other filters
* Customer comments for attorneys – how do we authenticate user?
* FAQ section
* Contact
* Advertisement space