Cat #	Application Module	Req #	Docs	Feature	Sprint	Subscription Level	Web	Mobile
1	System Administration	1.001		View All Users	1			
1	System Administration	1.002		Add / Edit User Account	1			
1	System Administration	1.003		Enable / Disable User Account	1			
1	System Administration	1.004		Ban / Deactivate User Account	1			
1	System Administration	1.005		View User Activity Logs	1			
1	System Administration	1.006		Monitor Live System Activity	1			
1	System Administration	1.007		Lockdown Entire System	1			
1	System Administration	1.008		Display Maintenance Message	1			
1	System Administration	1.015		View Roles List	1			
1	System Administration	1.016		Add / Edit Role / Role Permissions	1			
2	Account Administration	2.001		Login / Logout	1			
2	Account Administration	2.002		View / Edit MyAccount Details / Settings	1			
2	Account Administration	2.003		Reset MyAccount Password	1			
2	Account Administration	2.004		Add / View / Edit Company (Booking Agency)	1			
3	Communications	3.001		Scrape / Parse Incoming Mail Message for Order Details (Phase 1 - Standard Extraction)	1			
2	Account Administration	2.005		View / Edit MyAccount User Profile (Public Facing Page)	2			
3	Communications	3.002		Configure MobileNotaryMail Email Settings	2			
3	Communications	3.003		View MobileNotaryMail Inbox	2			
3	Communications	3.004		Manage MobileNotaryMail Folders	2			
3	Communications	3.005		Manage MobileNotaryMail Messages (Draft, Send, Search, Read, Move, Delete, Archive)	2			
3	Communications	3.006		Scrape / Parse Incoming Mail Message for Order Details (Phase 2 - Exception Extraction)	2			
4	Scheduling	4.001		Manage MyAccount Calendar Settings	2			
4	Scheduling	4.002		Manage Task List / To-Do's (View, Add, Edit, Delete, Complete)	2			
7	Website / Mobile	7.001		Standard Public Facing Web Pages (About, Product, Pricing, Contact)	2			
7	Website / Mobile	7.002		Splash Page - Animated Logo + Daily Inspiration / Affirmation	2			
1	System Administration	1.009		Direct Message a User Account	3			
3	Communications	3.007		Send a MyAccount MNE Connect Request to Another MNE User	3			
3	Communications	3.008		View MyAccount MNE Connections List	3			
3	Communications	3.009		Link a MobileNotaryMail Message to a Specific Order	3			
3	Communications	3.010		Scrape / Parse Incoming Mail Message for Order Details (Phase 3 - Attachments Extraction)	3			
3	Communications	3.011		Download Attachments from Message	3			
3	Communications	3.012		Initiate Chat with System Administrator	3			
3	Communications	3.013		Initiate Chat with MyAccount MNE Contact	3			
3	Communications	3.014		View MyAccount Chat History	3			
4	Scheduling	4.003		View MyAccount Calendar (w/ Toggle to View All Appointments or Only Available Timeslots) (and also show new, unviewed appointments in a different color and icon)	3			
4	Scheduling	4.004		Edit MyAccount Appointment Details	3			
4	Scheduling	4.005		Display Notification for Incoming Appointment Request	3			
4	Scheduling	4.006		Accept / Decline Incoming Appointment Request	3			
4	Scheduling	4.007		Send Automated Confirmation Text for Appointment	3			
5	Order Management (Notarizing & Signing)	5.001		View / Edit Order (including Rescission Date)	3			
5	Order Management (Notarizing & Signing)	5.002		Capture All Orders Automatically with Ability to Manually Add Order (and including partial order accept)	3			
5	Order Management (Notarizing & Signing)	5.003		Display ID and Notary Credentials to Signer(s)	3			
5	Order Management (Notarizing & Signing)	5.004		Add State Fees to Order (Automatically from DB Table)	3			
5	Order Management (Notarizing & Signing)	5.005		Add Task / To-Do's to an Order (Workflow Management)	3			
7	Website / Mobile	7.003		Tools & Resources Library (Useful tools and resources every Mobile Notary should have at their fingertips)	3			
7	Website / Mobile	7.004		Knowledge Base / FAQs	3			
1	System Administration	1.010		Monitor Group Chats	4			
1	System Administration	1.011		Disable Group Chat	4			
1	System Administration	1.012		Archive / Hide Group Chat	4			
1	System Administration	1.013		SaaS Subscription Management Software (Payment Processing) KillBill.io Payment Processior TBD	4			

Cat #	Application Module	Req #	Docs	Feature	Sprint	Subscription Level	Web	Mobile
2	Account Administration	2.006		View / Edit My Services & Fees Table (Private - Threshold Settings)	4			
2	Account Administration	2.007		View / Edit MyAccount Subscription Settings	4			
2	Account Administration	2.008		Manage MyAccount Notifications	4			
3	Communications	3.015		Manage MyAccount Blog Posts (Create, Edit, Delete)	4			
3	Communications	3.016		Scrape / Parse Incoming Mail Message for Order Details (Phase 4 - Manual Extraction)	4			
3	Communications	3.017		Create a Group Chat	4			
3	Communications	3.018		Join a Group Chat	4			
3	Communications	3.019		Add Third-Party Contacts to an Order Contacts List (along with video conference and SMS contact details)	4			
4	Scheduling	4.008		Initiate a Phone Call Directly from Calendar Appointment	4			
4	Scheduling	4.009		Manage Two-Way Automated SMS Dialogue w/ Signer(s) to Confirm and/or Reschedule Appointment Time on Same Day	4			
5	Order Management (Notarizing & Signing)	5.006		View and Respond to All MobileNotaryMail Messages Linked to Order	4			
5	Order Management (Notarizing & Signing)	5.007		Add Expenses to Order (Categorize by Personal or Business)	4			
5	Order Management (Notarizing & Signing)	5.008		Generate an Invoice from Order	4			
5	Order Management (Notarizing & Signing)	5.009		Send an Invoice Reminder for an Order (Manual or Auto-Settings)	4			
5	Order Management (Notarizing & Signing)	5.010		Apply a Payment to an Order	4			
5	Order Management (Notarizing & Signing)	5.011		Search and Filter Orders	4			
5	Order Management (Notarizing & Signing)	5.012		Enter and Track Write-off Expenses such as stamps and mileage	4			
6	Accounting & Reporting	6.001		View Invoices List (and Status)	4			
6	Accounting & Reporting	6.002		Manage Individual Invoices (Edit, Remind, Apply Payment, Close)	4			
7	Website / Mobile	7.005		MyFavorites - Ability to add any major MNE tool or function to a favorites page for rapid access (incl. my fav shippers)	4			
7	Website / Mobile	7.006		Blog	4			
1	System Administration	1.014		Manage Company Blog Posts	5			
2	Account Administration	2.009		Link External Calendar to MyAccount (Optional - User Choice)	5			
2	Account Administration	2.010		Link External Email to MyAccount (Optional - User Choice)	5			
4	Scheduling	4.010		Create a Google Map with Driving Directions for Appointment Route (including Traffic Conditions) - Updates in Real Time	5			
5	Order Management (Notarizing & Signing)	5.013		View My Daily Order Workflow	5			
5	Order Management (Notarizing & Signing)	5.014		Add Additional Signer(s) to Order	5			
5	Order Management (Notarizing & Signing)	5.015		Manual Lookup / Add County (Automatically from DB Table)	5			
5	Order Management (Notarizing & Signing)	5.016		Capture Signer(s) ID for Signing	5			
5	Order Management (Notarizing & Signing)	5.017		View Shipments (by Carrier and Date)	5			
5	Order Management (Notarizing & Signing) [1]	5.018		1. Allow Manual Entry of Nearby Shipping Centers (or explore auto-location and/or import of shipping centers near me) - User Favorties 2. Also with respect to shippers must leverage FedEx/UPS API to locate shipping locations ~Essentially we need to be able to allow User to enter their favorite shipping centers so they can select them, and we also need to capture and display all locations of full-service FedEx/UPS shipping centers (via their API), as well as express locations, such as FedEx Express, Mailboxes, Etc., FedEx/UPS dropboxes and so on with respect to my present location.	5			
5	Order Management (Notarizing & Signing)	5.019		Add a third-party contact (lawyer, booking agent, etc.) (w/ video chat contact and SMS details) to an order (Duplicate of item 3.019)	5			
6	Accounting & Reporting	6.003		View / Filter Canned Reports (Unpaid Invoices, Expenses, Mileage, Customer (Booking Agencies), Tax Summaries, P&L, Income / Billing [including by radius or county), Shipping, Workflow)	5			
7	Website / Mobile	7.007		User Forum	5			
2	Account Administration	2.011		Set Defaults / Thresholds for MyAccount (Working Hours, Fee Thresholds, Auto-Logout Time, Invoice Reminder Period, Etc.)	6			
2	Account Administration	2.012		View & Manage My MNEStorage (w/ Alerts)	6			
2	Account Administration	2.013		Link MyAccount to My Own Personal Cloud Storage Account (Dropbox, iCloud, Google Drive, etc.) (Good idea???)	6			
5	Order Management (Notarizing & Signing)	5.020		Create a Custom Daily Workflow	6			
5	Order Management (Notarizing & Signing)	5.021		Capture Mileage from Home Base to Signing Location as well as In between Signing Locations (GPS if possible)	6			
5	Order Management (Notarizing & Signing)	5.022		Print Closing Documents for Signing*	6			
5	Order Management (Notarizing & Signing)	5.023		Track Packages for an Order / Scan/Add Package Tracking Nbr to Add to Order	6			
5	Order Management (Notarizing & Signing)	5.024		Scan and scrape a Paper Invoice; Generate Order (Still valid???) -- bad value proposition?	6			
6	Accounting & Reporting	6.004		Generate Final Tax Reports for Filing (Schedule C, Schedule SE, Etc.) - Quarterly & Annual	6			

Cat #	Application Module	Req #	Docs	Feature	Sprint	Subscription Level	Web	Mobile
6	Accounting & Reporting	6.005		Export / Import Bank Statements via Plaid.com	6			
6	Accounting & Reporting	6.006		Create / View Custom Reports	6			
6	Accounting & Reporting	6.007		Auto-Purge Data After 48 Months and 3 Warnings. At 4th Warning autocreate XLS export and email it to them, then purge. [2]	6			
6	Accounting & Reporting	6.008		Export to QuickBooks, TurboTax, or accounting software. (Zapier?)	6			
6	Accounting & Reporting	6.009		Send Batch Invoices (Not sure on this one)	6			
7	Website / Mobile	7.008		Academy	6			
8	BETA Testing							
9	Go-Live							

Function	Description	
Scanning Shipping Barcode (USPS, UPS, FedEx)	Phone must be able to scan shipping label and stuff scanned number into tracking number within app and also within the Signing Agent's website. The app will also take a picture of the package and the Shipping Label. Should the package be dropped off at a Shipping Center and a confirmation receipt is obtained from the Shipping Center, the confirmation receipt can be captured within th web app and also uploaded to the Signing Agent's App should it have that capability or at the very least email shoud the mobile notary decide to do this.	
Hand Holding phone	Have Screen setup for left or right handed person	
Phone Modified Verision of Screen	Talk about modified Screen	?
Chat/Video Calling	Chat Abilities tied into Zoom, Google, Duo for Closing that require attorny's	
Have daily affirmation appear on front page	Something Uplifting to appear on the front page	
Notary tools page	Page to contain Links, Rescission Calendar, County Look-up, etc	
Ability to add in expenses per signing	Good if we can bring up phone cam and scan by barcode or price.	
Ability to add in expenses not attributed to a signing		
Ability to see workflow of signings		
See see GPS map of signings		
Calendar of Signings and ability to switch to available time slots		
Ability to set paramaters to put signings into automatic, semi-automatic, and manual accepting of signings of incoming text messages		
Ability to scan each incoming text message for possible signing opportunity.	The text messags come in various formates and also have links to follow for scanning of dates, times, locations and closing fee's	
Ability to Close out a closing in the work order system		
Ability to access the Chat Group		
Ability to acsess Forum		
Abiility to access Academy		
Ability to access email		

Function	Description	
Minimal Version of the Accounting System including invoive view and resend	We would like to understand whats possible here.	
Minimal Version of Order Management	We would like to understand whats possible here.	
WorkFlow Management		
All the normal login, out, reset pages		
Native Android, iOS		
There will be NO purchases from these applications	We don't want an App Store or Google Play bill!!!	
I have developers accounts on both Google and iOS		

[1] May not be the right category.

[2] We need to distill this functionality out better. Perhaps buy more storage, or premium plan allowance, etc.