Homeowner - _Logged in_

- Tabs to use, and in order - which should also be stickied. ***Please rename all tabs to follow the below:***
  - Post Project
  - My Projects
  - My Reviews
  - Messages
  - Favourites
  - Homii Tips
  - Incentives
  - Edit Profile
- When a top tab is clicked, it should remain the same Orange as when it's hovered over.
  - Basically, anything that can be CLICKED on the site, when hovered over, the text should change colour (or give some indicator to the user that they can click).
- Default image = Homii Magnifying Glass
  - THIS SHOULD NEVER CHANGE.
- We should make the user icon image at the top right hand the Homii Magnifyging Glass
- When I click Logout, for some reason, I need to click it twice...
- We like that when a homeowner logs in (after their initial login, which will prompt the video to display), they are directed towards the "Post Project" page.
- Within the current "Create Project" the final button should read "POST," as there are no future steps when a user is already logged in.
- Within the current "Project List" tab:
  - We should make the individual fields underneath Delete & Mark As Complete as a blank box, in which the user will check mark when actioning either item. This will should then trigger a second alert asking if the user is sure of their action (FOR BOTH DELETE & MARK AS COMPLETE)
    - We should alert user's that "Marking this as complete/Deleting this job, is for your own reference and will only be reflected on your profile"
  - We should remove the "EDIT" function, since this will not be changing on a contractor's side, it's kind of irrelevant. What do you think?
  - When you click into "Contractor Matches," the user should be able to click anywhere on the contractor's box to get into their profile. Not just on their Company name.
  - The tabs within should read "OPEN PROJECTS" & "COMPLETED PROJECTS"
    - As well, POST A NEW PROJECT button should be a larger box and in a similar font. Maybe we place it somewhere else on the page?
      - OR, why don't we get rid of this altogether? Since the top bar has a POST PROJECT button always showing….?
  - At the bottom of the results, we couldn't see how the "PREVIOUS" & "NEXT" button will look when hovered over or clicked. However, we don't like the size, colour, or text as it current is. Please make it visually appealing, and keep this consistent throughout.

- Within the "Incentives" tab:
  - We don't need to display an image, and we especially shouldn't give an option to add, since a homeowner will never display their image publically… If this is to fill space, please use the default Homii Magnifyging Glass.
  - Let's call it an "Incentive ID"
  - We don't need to display the user's Email ID, unless I'm missing something?
  - I want to have more of the URL showing in the box with the unique referral code. We can move the URL underneath a button saying "Copy your unique referral code:"
  - Please make the "Share to Social ICONS" smaller
  - Total Due & Amount Earned" should be swapped, and "Request Payment" should be written a few sizes smaller. As well, please change the colour of Request Payment to a darker colour. Orange doesn't look great.
    - Both dollar amounts should have "$" before them.
    - NOTE: Request Payment, should be underneath/inside the "Amount Due" box.
- Within the "Reviews" tab:
  - Reviews should display the Contractor Company Name, not the individual who signed up.
  - Since we can only click on the Company Name to get to a contractor's profile, we need to make it OBVIOUS that that is where to click. Maybe change the colour to underline it, make the font bigger, etc…
    - We want this to be as easy as possible! Please use your expertise here.
  - As discussed, we'll add another action item on this page to prompt homeowner to write a review for another company.
- Within the "Favourite Contracto" tab:
  - What will be displayed? Currently, you're showing a review? What if this homeowner hasn't review a favourited contractor?
  - I think we should display a brief overview of the contractor's business, with the information they've provided upon signup
    - Show Company Name, Avg. Star Ratings, Categories offered, Message/Chat option, Phone number, Review, and Company logo/picture.
    - When I click on for example, avg. star ratings, I should be taken to that company's reviews. When I click on Messages, it should go to chat. When I click on the phone number (from mobile) it should call the company. When I click on review, it should allow me to write a review. Etc, etc, etc,.
      - This goes for all content on site basically. If you see a contractors name somewhere, you should be able to click on them. Or their reviews, etc.
- Within the current "Chat" tab:

- ○ We have questions for SendBird and need a company email before we can setup a call with them.
  - ■ We don't like the look of it right now. Seems like it would
- Within the current "Edit Profile" tab:
  - ○ When I click "Change Password," we MUST force the user to input their CURRENT PASSWORD first. Only then can they change their password.
    - ■ Thus, the fields will read:
      - Current Password
      - New Password
      - Confirm New Password

Contractor - *Logged in*

- Tabs to use (which should also be stickied). ***Please rename all tabs to follow the below:***
  - ○ My Projects
  - ○ My Reviews → ***This section is missing completely!***
  - ○ Messages
  - ○ Incentives
  - ○ Homii Tips
  - ○ Edit Profile
- When a top tab is clicked, it should remain the same Orange as when it's hovered over.
- We should make the user icon image at the top right hand the Homii Magnifyging Glass
- When I click Logout, for some reason, I need to click it twice...
- Default image = Homii Magnifying Glass
  - ○ They should be triggered to change this image.
- Within the current "Project List" tab:
  - ○ Firstly, there will only be two tabs within: "My Projects" AND "Completed Projects"
  - ○ We want to keep these categories within this tab (for the search result box):
    - ■ Job Title
    - ■ Job Description
    - ■ Estimated Budget
    - ■ Estimated Start Date
    - ■ City
    - ■ View
      - This is basically giving all the same information that we're already displaying… WE WANT TO TALK ABOUT AN EASIER WAY TO DISPLAY THIS INFO...why have it twice??? I like the "VIEW" but if it doesn't show it nicely, then….. It kinda sucks..
        - ○ Would be nice if they could view as PDF or something, and then send to email, print, etc.
    - ■ Chat
      - Should read "Message Homeowner"

- - - ■ Mark as Complete (should be an empty box, and with a "did you mean to mark as complete" similar to the homeowner setup).
        - ● We should tell contractor's "Marking this complete is for your own reference, and enables you to track your Return on Investment with Homii, and will only be reflected on your profile""
    - ○ Remove "Categories" & "Status"...What is Status even???
    - ○ Within the Completed Jobs tab:
        - ■ This is where we discussed showing some analytics for the contractor, around how much they earned.
        - ■ Maybe instead of showing "Estimated Budget," we should have it read "Estimated Revenue"
            - ● Can we make it so that when a contractor Marks a Job Complete, we force them to input how large the project was in $$???
                - ○ This will allow us to track properly, as well as give the contractor a realistic view on how well this is working for them.
        - ■ We'll remove Categories from this list too.
- ● Within the "Incentives" tab: **SAME AS HOMEOWNER INCENTIVE NOTES**
- ● Within the current "Chat" tab: **SAME AS HOMEOWNER INCENTIVE NOTES**
- ● Within the current "My Profile" tab:
    - ○ Let's make the Toggle buttons smaller at the top - they're too big right now
    - ○ Within the forms, all of the fonts and boxes seem so large. Let's reduce the size a little bit and make it easier to get through.
    - ○ Let's have buttons read "Edit Private Information" AND "Edit Company Information"
        - ■ Under "Edit Private Information" we should include:
            - ● First Name
            - ● Last Name
            - ● Phone Number
            - ● Postal Code
            - ● Email Address
            - ● Password
            - ● Change Password
                - ○ When I click "Change Password," we MUST force the user to input their CURRENT PASSWORD first. Only then can they change their password.
                    - ■ Thus, the fields will read:
                        - ● Current Password
                        - ● New Password
                        - ● Confirm New Password
        - ■ Under "Edit Company Information" we should include:
            - ● The Company Logo/Icon, which we are NOT showing in the Edit Profile

- The Gallery Images, which we are NOT showing in the Edit Profile
- Everything else that we currently have, except let's add the "Upload Company Logo" & "Gallery Images" towards the top.
  - What fields are mandatory here? What will a public facing profile look like if a user doesn't complete any of their company info?

Referrer - *Logged in*
- There will be NO TABS / 2nd header for a Referrer.
- We should make the user icon image at the top right hand the Homii Magnifyging Glass
- When I click Logout, for some reason, I need to click it twice...
- Default image = Homii Magnifying Glass
  - THIS SHOULD NEVER CHANGE.
- Within the "Incentives" tab: **SAME AS HOMEOWNER INCENTIVE NOTES**

System Admin - *Logged in*
- Tabs to use (which should also be stickied). *Please rename all tabs to follow the below:*
  - Projects
  - Reviews
  - Categories
  - Cities
  - Provinces
  - Incentives?
    - We need to add an incentive category for us.
    - We should have access to incentives as well, in case we need to manually manipulate? If system doesn't capture something
    - As well, we want this to be able to collect all the data:
      - Total amount paid out, with the option to change the date range
  - System User
- When a top tab is clicked, it should remain the same Orange as when it's hovered over.We should make the user icon image at the top right hand the Homii Magnifyging Glass
- When I click Logout, for some reason, I need to click it twice…
- Within the "Project List" tab:
  - We want to see some statistics here:
    - Total Jobs posted (this month, this year, etc.)
    - I know we can count the pages, however, onc we are larger, that won't be feasible.
  - Nothing is populating in the search results, and we are unable to test the Actions here…
    - What we REQUIRE is: ability to *Edit* (Add or remove any text or images to an already existing project, which should populate on the contractor

and homeowner site), ***Delete completely***, or ***Post Brand New*** (for a homeowner).

- At the bottom of the results, we couldn't see how the "PREVIOUS" & "NEXT" button will look when hovered over or clicked. However, we don't like the size, colour, or text as it current is. Please make it visually appealing, and keep this consistent throughout.

- Within the "Cities" tab:
  - As long as the cities we add will fall into the backend matching algorithm, as well as the payment gateway, then we're all set.
  - At the bottom of the results, we couldn't see how the "PREVIOUS" & "NEXT" button will look when hovered over or clicked. However, we don't like the size, colour, or text as it current is. Please make it visually appealing, and keep this consistent throughout.

- Within the "Provinces" tab:
  - As long as the cities we add will fall into the backend matching algorithm, as well as the payment gateway, then we're all set.
  - At the bottom of the results, we couldn't see how the "PREVIOUS" & "NEXT" button will look when hovered over or clicked. However, we don't like the size, colour, or text as it current is. Please make it visually appealing, and keep this consistent throughout.

- Within the "Categories" tab:
  - How does the Category Charge work? How will this tie into the backend payment system?
  - At the bottom of the results, we couldn't see how the "PREVIOUS" & "NEXT" button will look when hovered over or clicked. However, we don't like the size, colour, or text as it current is. Please make it visually appealing, and keep this consistent throughout.

- Within the "System User" tab:
  - We want to have statistics here, showing us:
    - Total Revenue earned (this month, this year, etc.)
    - Total Referrer $$ Earned / Owed (this month, this year, etc.)
    - Visitor to site this month
    - Total Homeowner count
    - Total Contractor Count
    - Total Referrer Count
    - Will BrainTree offer something for this?
  - What do the actions do on this page? The one action and then the "amount" button?
  - How will we know if a user has paid? How will we know if a user's CC is expired/expiring?
  - Can we make homeowner's / referrer's inactive as well? Or is it just Contractors?
  - At the bottom of the results, we couldn't see how the "PREVIOUS" & "NEXT" button will look when hovered over or clicked. However, we don't like the size,

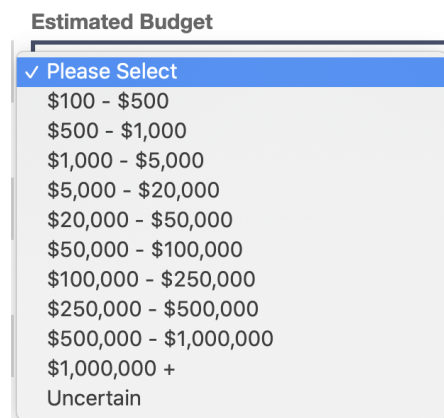colour, or text as it current is. Please make it visually appealing, and keep this consistent throughout.

- Within the "Homeowner Review" tab:
  - We need a search function here, so that we can quickly find and address bad/false reviews
  - Please change the two action buttons here into one single button, since they do the same thing (allow the Admin to View & Edit). You can call it "VIEW"
  - At the bottom of the results, we couldn't see how the "PREVIOUS" & "NEXT" button will look when hovered over or clicked. However, we don't like the size, colour, or text as it current is. Please make it visually appealing, and keep this consistent throughout.
- WordPress
  - What will this look like for us? Where will we access?
  - What pages will fall under WordPress?

Basic user - *NOT Logged in*

- When I click "POST A PROJECT," from the homepage, there are typos on the fields.
  - Both buttons are different sizes….. We need to keep consistent throughout the entire site!
  - "Job Description" is incorrectly spelt
  - "Estimated State Date" should all be capitalized
  - "ATTACH FILE(S)" needs to be displayed differently, because right now it looks like it could be a "previous" button… how can we show it so that it's clear?
    - TrustedPros has it displayed like the below image. Please copy.

      + Add Files   (Optional) Add documents or images that might be helpful

  - When I click on "Estimated Budget," we need to have a dropdown similar to TrustedPros - to make it easier for homeowners to select a budget, and for us to track estimated project size. See image below. Please copy fields

    Estimated Budget

✓ Please Select
$100 - $500
$500 - $1,000
$1,000 - $5,000
$5,000 - $20,000
$20,000 - $50,000
$50,000 - $100,000
$100,000 - $250,000
$250,000 - $500,000
$500,000 - $1,000,000
$1,000,000 +
Uncertain

- ○ When a user clicks "NEXT," it should take them to the CREATE YOUR ACCOUNT / TELL US ABOUT YOURSELF → the same as the TrustedPros setup. We can have ours in 2 steps, or 1. Your call.
  - ■ When a user completes this "Step 1," they can either fill out their information to create an account & post project all in one, OR, they can click "Already have an account? Sign in." and then their project will be automatically posted and put into their account.
- When signing up, for ALL USER TYPES, they must have a duplicate Password field to ensure accuracy. As well, they need a duplicate Email field to ensure accuracy.
- When signing up, specifically for CONTRACTORS, we must display all 4 of these below for them to click and agree to.

By Checking the Boxes Below:

☐ **I AGREE** I have read and agree to TrustedPros Terms & Conditions.

☐ **I AGREE** I have read and agree to TrustedPros Privacy Policy.

☐ **I AGREE** I have read and agree to TrustedPros Code of Conduct.

☐ **I VERIFY** I verify that I am the owner of or I am authorized by to register this business and manage this listing.

- There is nowhere to Review a contractor that we can see as of yet, however, this should be available for any user who is not logged in. See TrustedPros process → https://trustedpros.ca/write-a-review
  - ○ We want to follow the same process as them. See what it looks like to "search for a contractor and write a review" without having an account.

Footer & Header

Header:
- Can we see what it would look like if we reduced the size of the house in the logo?
- Header should always be stickied
- Entire should be centered
- Let's move the logo down so that the writing is centered with the search bar & sign up/login. It's okay that the bottom of the magnifying glass sticks lower.
- Search functionality should always provide a dropdown to the user based on the fields that match the letters being typed. As more letters are added, less results will show, until finally, the one result being typed to completion will be displayed.
- SIGNUP button: will go to a page that has the two large boxes side by side displaying (HOMEOWNER) or (CONTRACTOR) and below them, we will have a smaller box showing (REFERRER) → see Trustedpros for reference… it's similar, minus the. referrer section.

Footer:
- Homeoner
  - ○ Login/Signup
  - ○ Post Project

- - - Write A Review
    - Search Contractors/Categories
    - Incentives
    - Tips For Hiring → video
      - Please make this on WordPress so that we can make changes
    - Review Guidelines
- Contractor
  - Login/Signup
  - Incentives
  - Pricing
  - Code Of Conduct
  - Tips → video
    - Please make this page on WordPress so that we can make changes
- Referrer
  - Login/Signup
  - Tips → video
    - What's in it for them, what's in it for them
    - Please make this page on WordPress so that we can make changes
- Homii
  - About
  - Blog
  - Contact Us
  - Terms & Conditions
  - Review Guidelines
  - Code of Conduct
- We'll create our social media links towards the end
- Please change text in footer, underneath logo to read "All Rights Reserved (little R in circle)2020 homii"
- Can we see what it would look like if we reduced the size of the house in the logo?

BrainTree Information
- Created a sandbox account, as per the BrainTree's suggestion
- We will create our live business account once we're all confirmed with the testing
  - Sandbox details:
    - **Username:** yourhomii@gmail.com
    - **Password:** X1T3YEDfeu*u

SendBird Information
- Created a free account using my personal email, since they will not allow us to start a paid service until we have our company emails purchased and setup.
- See details below:
  - **Username**: *yourhomii@gmail.com*
  - **Password**: *eWpKY%7u8ULF*