**theraterbase.com – notes and change requests**

General

* Address Book User Login
  + Navigation Bar is doing weird spacing thing on drop downs. (See Figure 01)
  + Dashboard – Recent Projects is pulling recent projects from all users? (See Figure 02)
  + User Access Rights controlled by “Group” assignment
    - Full Access Rights
      * Office Staff
      * Rater
    - Limited Access (Access to see “Projects”, “Lots”, “Calendar Items” for associated items)
      * Builder
      * Contractor
      * Home Owner
      * No access to “Address Book”, “Marketing”, “Projects – Builders”, “Projects – Sub Contractors”

Address Book

* Address book Screen Changes (See Figure 03)
  + Change “Other Phone” to “Office Phone”
  + Remove “Agent Information”
  + Move “Email Address” to the Personal Information Box
  + Move “Website URL” to part of the “Company Information”
  + Move “Group” to the ‘User Access’ box.
    - Assigned Group will determine user restrictions
  + PHASE II Changes
    - XML call to CalCERTS for ‘Signature Agreements’ merging with Address Book Entries
      * CalCERTS Web Service “Get Users who have issued signature authority”
      * Need to know what XML Call returns

Lots Search Screen

* “Action” Button screen for “Assigning CF1R”
  + Hitting “Apply Assignation” Button should also close screen and needs to refresh the Lots list

Lot Details Screen

* HVAC Systems Screen
  + This is still acting funny, we need to discuss this in the meeting

Scheduling Workflow Details

* General
  + Make “Projects” --> “Lots” (Lot Search) Look, feel, and operate like the Projects Lots Tab, including the changes below, with the exception of it being for ALL lots regardless of project
* Rater Assignments (Scheduled Tasks)
  + Rater login will show them the lot & address of each lot they are assigned too, sorted by Date / time.
  + Each lot will show inspections required to be done, based on “Inspection Type” set for this visit.
    - Frame Inspection Forms
      * Quality Insulation Inspection (HQII)
      * Misc Inspections - Thermal Bypass Checklist
      * Misc Inspections – Above Code Checklist
    - Final Inspection Forms
      * Low Leakage Ducts
      * Refrigerant Charge Test or CID
      * EER Verification
      * Infiltration Inspection (Blower Door)
      * Airflow Verification
      * Maximum Cooling Capacity
      * Fan Wattage Verification
      * Misc Inspections - Thermal Bypass Checklist
      * Misc Inspections – Above Code Checklist